

# The Socio-Political Instability Observer

## Results from the Socio-Political Instability Survey

January 2025



Source (from left to right): Displaced Palestinians return to their homes following the 2025 Gaza war ceasefire, [REUTERS/Khalil Ramzi](#). The German Chancellor loses confidence vote against his government, triggering early elections, [Euractiv \(Michael Kappeler/picture alliance via Getty Images\)](#). Celebrations after the fall of Assad's regime, [Wikipedia Commons](#). President Trump is sworn as the 47th President of the United States, [Wikipedia Commons](#).

This 'Observer' factsheet outlines the results of the fifth Socio-Political Instability Survey. In this survey, military, economic, diplomatic, environmental and demographic factors are encompassed as drivers of socio-political instability. Extreme socio-political instability includes the probability of conflict fatalities, and specifically, the fatalities that result from the incidence of armed conflict. To learn more about the Survey, please visit the [HCSS website](#).

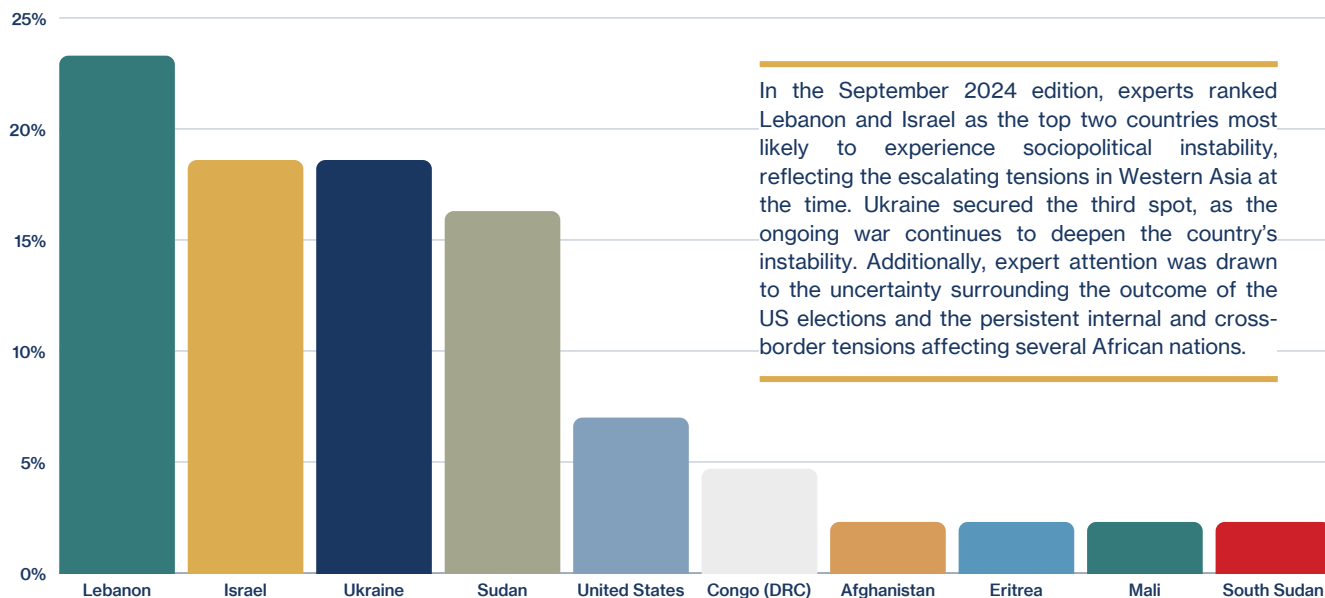
The January 2025 edition of the Observer series continues to monitor high levels of instability in Western Asia and Eastern Europe. Although a ceasefire was reached for the Gaza war, the region still faces great instability due to the continuous tensions between Israel and Iran, as well as the uncertainty left after the collapse of the Assad Regime in Syria. At the same time, Ukraine has regained the top of the list of countries most at risk of socio-political instability, possibly due to the uncertainty surrounding the future of the war. However, when it comes to the country exercising the most influence on global socio-political instability, the United States jumped from around 15% in the last edition to 60% this year, highlighting the uncertainty connected with the second Trump administration and its new approach towards historical allies and adversaries. This edition also highlights that economic factors have now surpassed military ones as the primary drivers of instability, likely due to the heightened possibility of trade wars.

The survey further examines the potential outcomes of the Russo-Ukrainian war, the EU's stance within the U.S.-China rivalry, and the Sustainable Development Goals (SDGs) most affected by geopolitical tensions. Finally, respondents reflect on instability within their own countries

## 1. Results from September, 2024

### Country likely to experience the most socio-political instability in the next six months

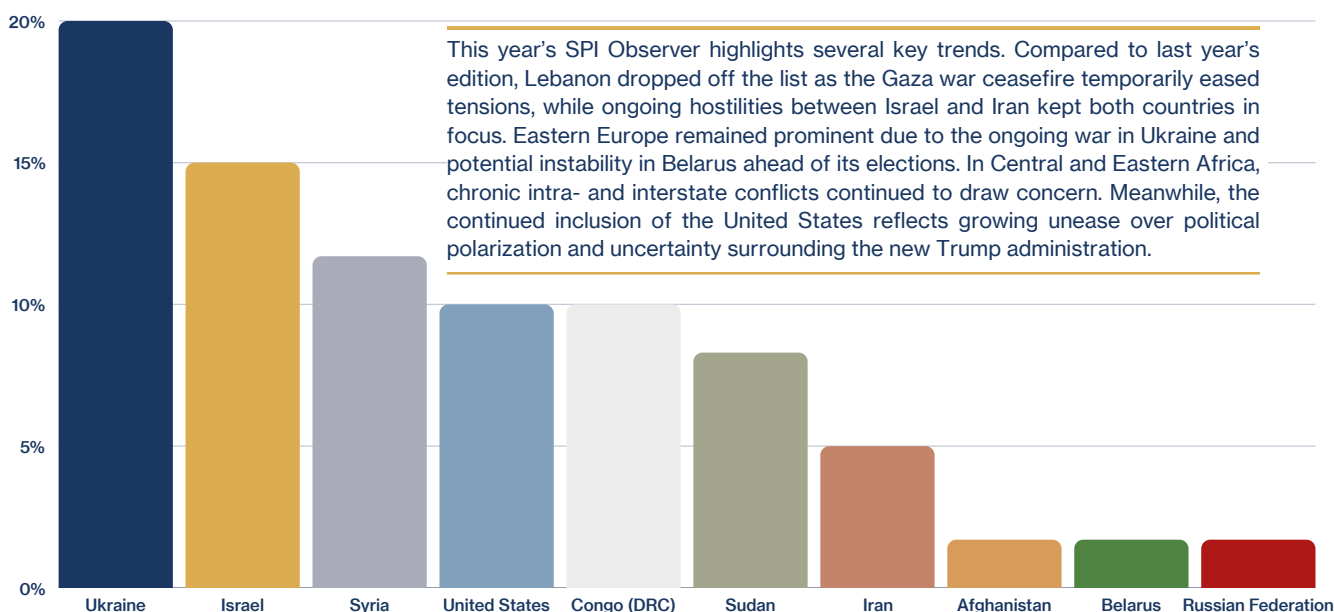
Answering the question: "Which country do you assess will have the highest sociopolitical instability over the next six months?", experts predict that Lebanon, Israel and Ukraine would experience most socio-political instability in the following six months.



## 2. Results from January, 2025

### Country likely to experience the most socio-political instability in the next six months

In this edition, experts predict that Ukraine, Israel and Syria will experience most socio-political instability in the next six months.



#### Top 3 Sep 2023:

1. Ukraine 24%
2. Russia 15%
3. Niger 11%

#### Top 3 Jan 2024:

1. Ukraine 19%
2. Israel 19%
3. Lebanon 13%

#### Top 3 Sep 2024:

1. Lebanon 23%
2. Israel 19%
3. Ukraine 19%

#### Top 3 Jan 2025:

1. Ukraine 20%
2. Israel 15%
3. Syria 12%

Main Drivers of socio-political instability

Answering the question “For this assessment, please indicate the impact of the following drivers of sociopolitical instability”, the experts mentioned Economic drivers as the main factors behind socio-political instability, followed by Military and Environmental factors.

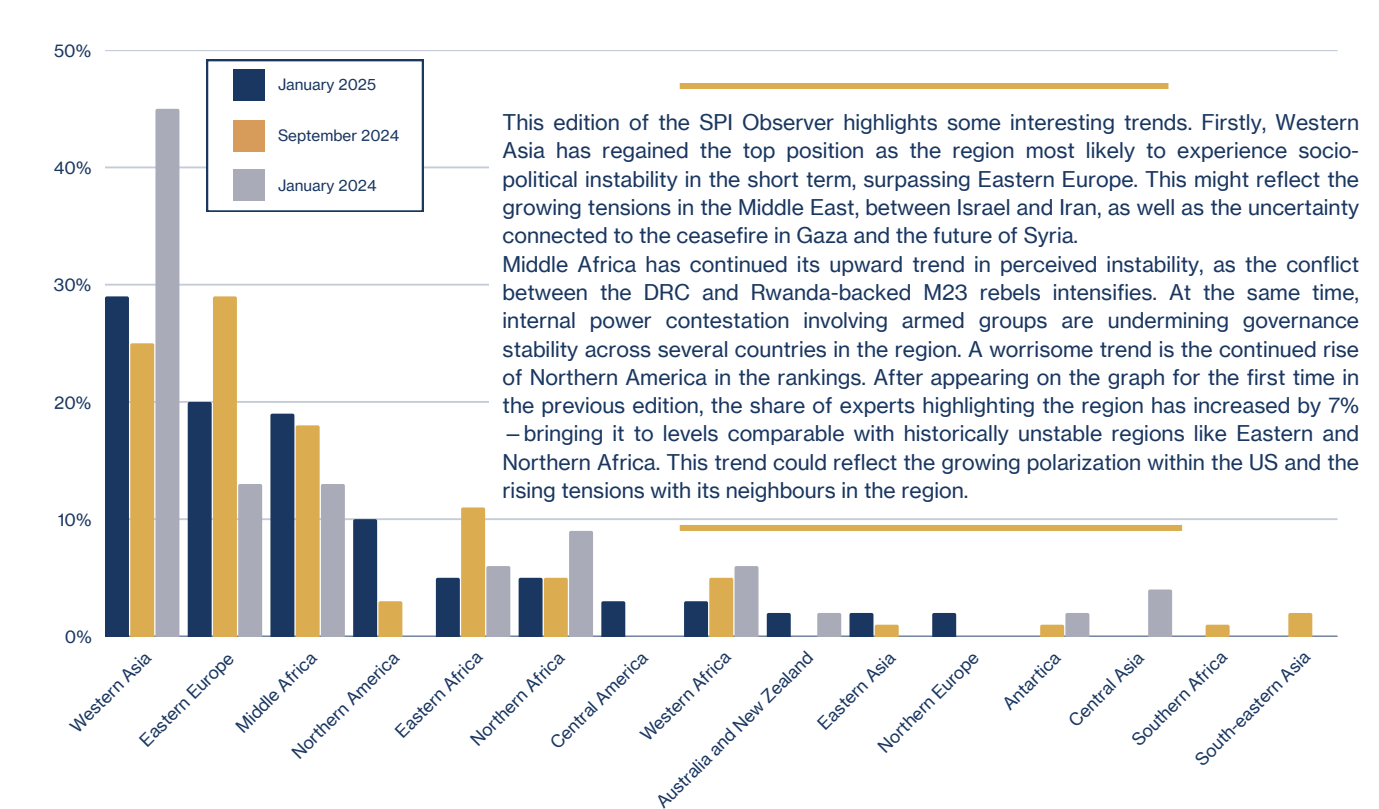
Experts scored five drivers of socio-political instability in terms of impact globally, from 1 to 5, with 1 being the most impactful driver.

September 2024	January 2025
1 Military	1 Economic
2 Economic	2 Military
3 Environmental	3 Environmental
4 Demographic	4 Diplomatic
5 Diplomatic	5 Demographic

“ This year’s SPI Observer results reveal notable shifts in expert opinion. Most significantly, economic drivers have overtaken military ones, suggesting that renewed trade tensions – particularly in light of the new US administration – could have a major impact on global sociopolitical stability. At the lower end of the table, diplomacy has risen in importance, surpassing demographic factors. This shift could point to a growing recognition of diplomacy’s role in addressing emerging (economic) disputes between countries. Meanwhile, environmental factors hold steady in third place, highlighting the ongoing significance of sustainability and the growing influence of climate change on future sociopolitical dynamics. ”

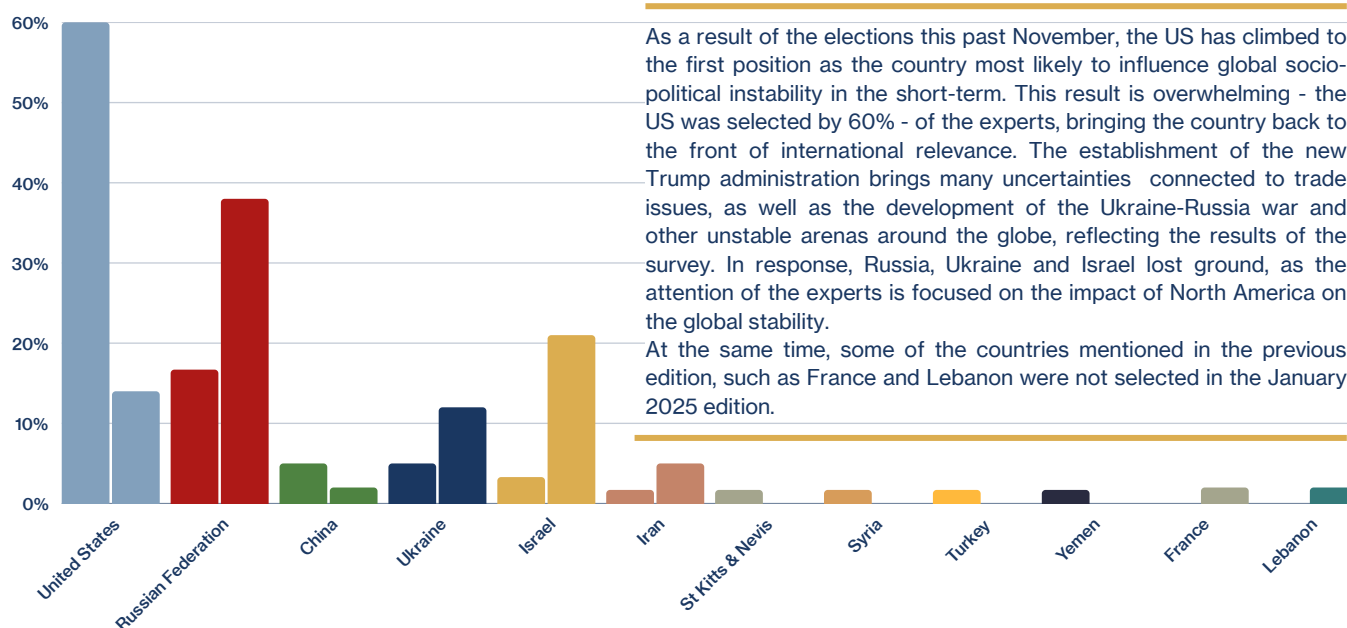
Regions likely to experience most socio-political instability in the next six months

Answering the question: “ Which region do you assess will have the highest sociopolitical instability over the next six months?”, experts predict that Western Asia is the region most likely to experience socio-political instability in the short term



## Country likely to exert the most influence on global socio-political instability in the short term

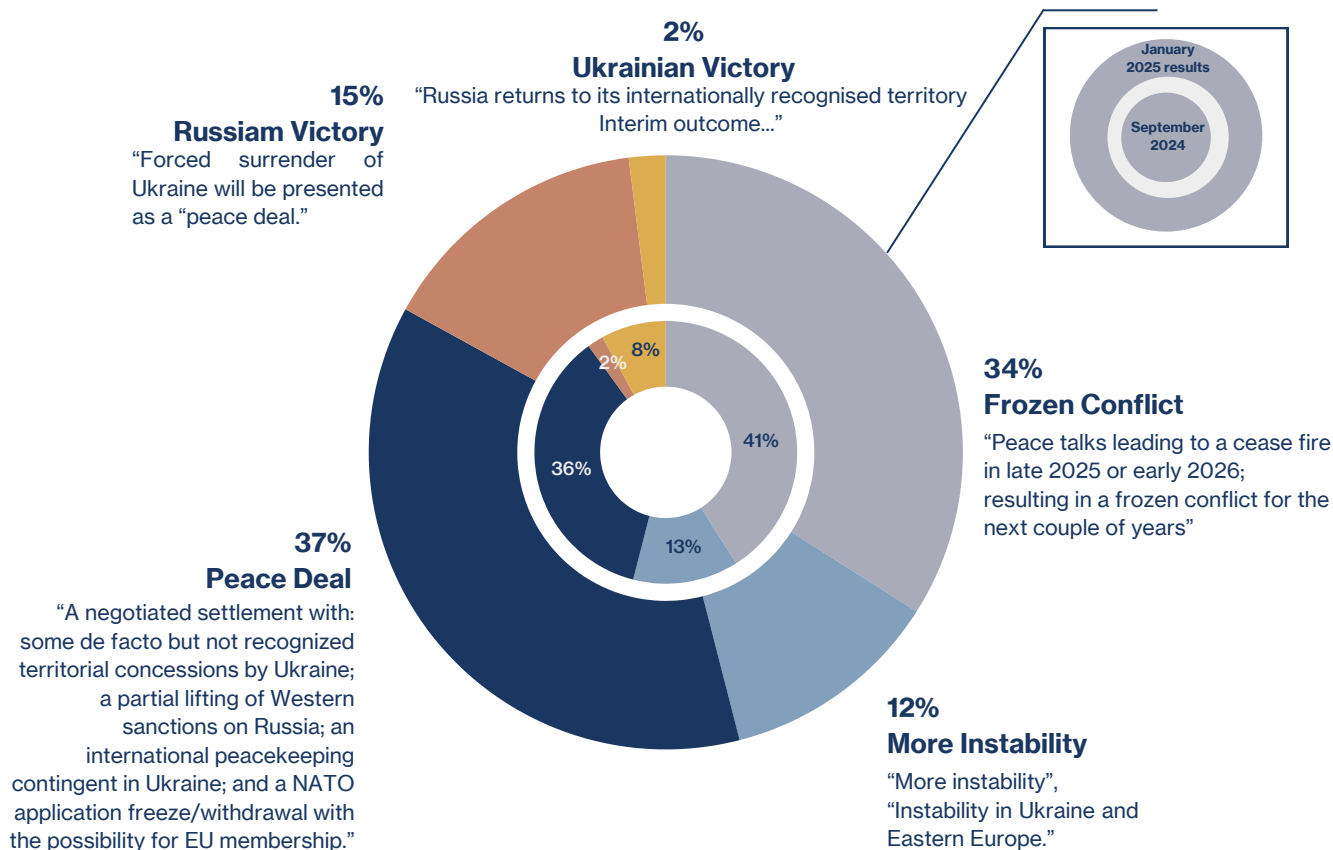
Answering the question: "Which country do you assess will have the most impact on global sociopolitical instability over the next six months?", the experts predict that the United States, the Russian Federation, China will exert the greatest influence on global socio-political instability.



## 3. Looking Onwards: Likely Outcomes of the Russia-Ukraine War and EU's Position Between US and China

### Most likely outcomes of the Russia-Ukraine war

In an open question, experts signaled that they expected a peace deal or a frozen conflict to be the most likely outcomes.



## Making sense of the results

### Stalemate and pragmatism dominate expert expectation



Compared to September 2024, the January 2025 SPI Observer shows a clear shift with respect to the war in Ukraine. This edition underlines a growing pessimism with respect to the chances of Ukraine to end this war on favourable terms. A number of reasons might underpin these results:

#### 1. The Trump effect

The return of Donald Trump to the US presidency has injected uncertainty into Western unity. His ambivalence toward NATO and Ukraine, coupled with the potential for reduced US support, may have weakened confidence in Ukraine's chances of reclaiming occupied territories. As a result, the expectation of a Ukrainian victory plummeted to 2%.

#### 2. Russia's economic resilience

Despite the heavy sanctions imposed by the West, Russia managed to sustain its war effort, redirecting its export to Asia - most importantly China and India - and relying on commercial triangulations to circumvent the sanctions. Time gives Russia an advantage as Western "fatigue" continues to grow. As a result, the number of respondents expecting a Russian victory increased from 2% to 15%.

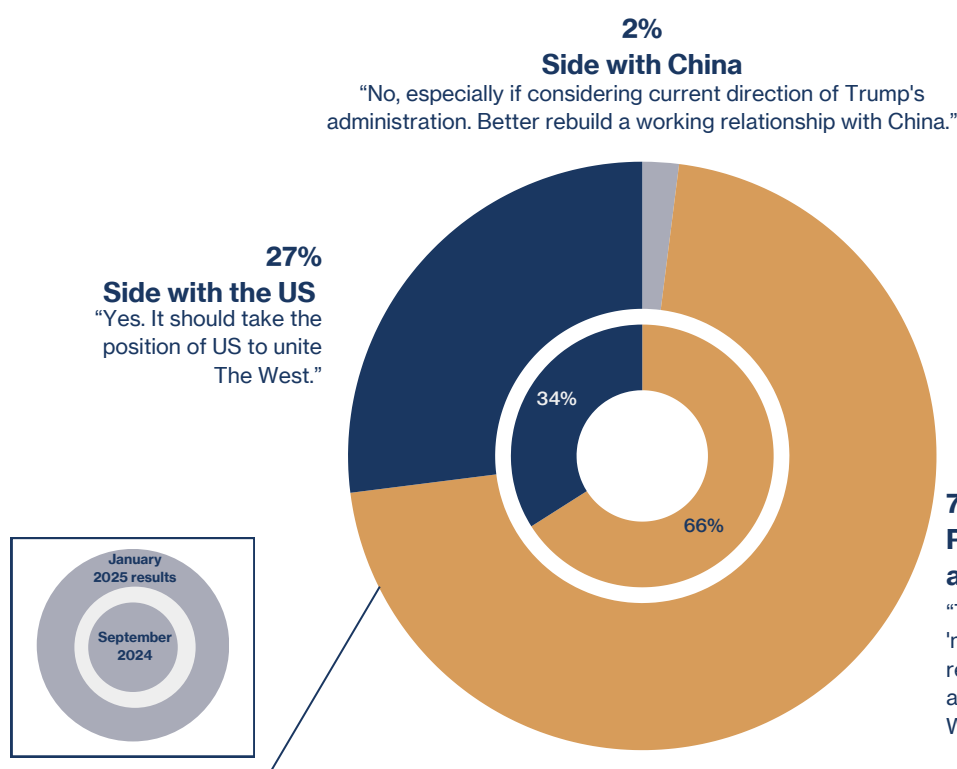
#### 3. End in sight?

Similarly to the September 2024 edition's results, the vast majority of the experts believed that the war will come to a conclusion, either through a peace deal (37%) or a frozen conflict situation (34%). This overwhelming consensus might be the consequence of the contextual factors surrounding the war mentioned above, which might pressure the parts to meet at the negotiating table.



## Position that the EU should take in the strategic competition between the US and China according to the experts

Answering the question: "Should the EU take a position in the strategic competition between China and the US, and if so which?", most expert believe that the EU should pursue some form of strategic autonomy.



#### “ — Analysis:

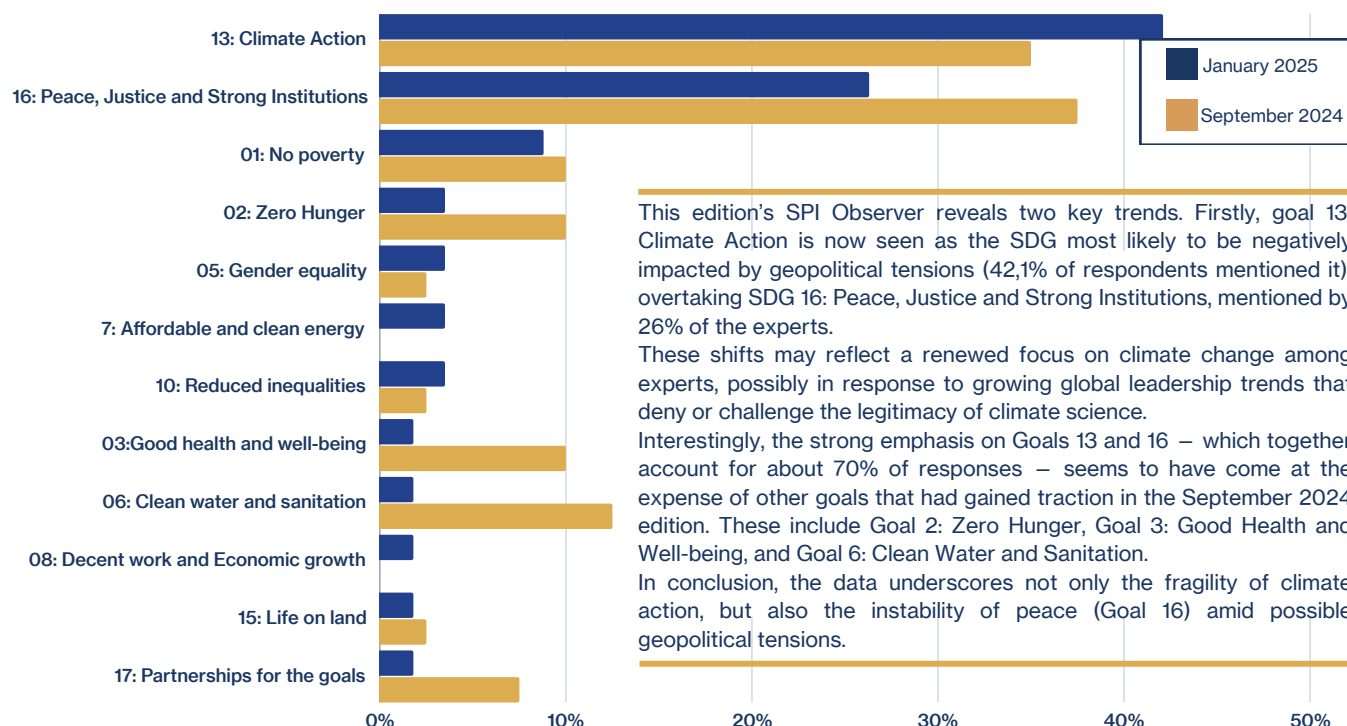
This year's result display a shift in the perception of where the EU should position itself, mainly in response to the second Trump administration's trade and discursive stance towards the EU. The percentage of respondents arguing for the EU to stick with the US dropped by 7%, with 5% moving towards strategic autonomy and 2% favoring closer ties with Cina.

#### 71% Pursue a form of strategic autonomy

"The EU should follow a path of 'multi-alignment', which is the only reasonable direction. It cannot afford to make enemies of either Washington or Beijing."

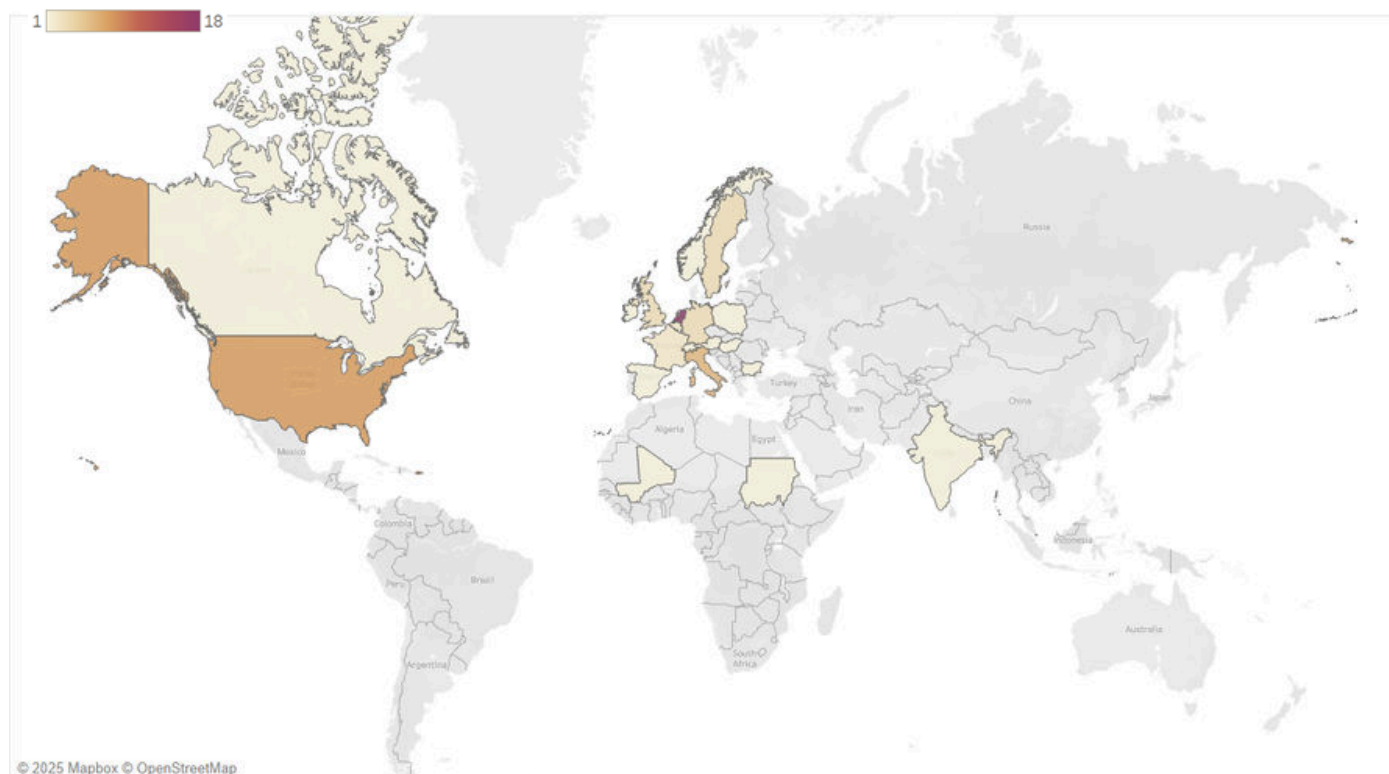
## Sustainable Development Goals (SDGs) most negatively impacted in the next two to five years due to geopolitical tensions

Answering to the question: “Which Sustainable Development Goal (SDG) will encounter the most difficulties in its implementation in the next two to five years as a result of heightened geopolitical tensions?”, most expert maintain that the goal 13: Climate Action, will be the most impacted SDG by geopolitical tensions.



## Place of residence of the experts surveyed

Most of the respondents reside in the Netherlands, United States, and Italy.



- 60 experts from universities, think tanks and research institutes completed this version of the survey.
- Our expert respondents reside in 21 different countries across 10 different regions.
- Participation rate increased by 39% compared to the September 2024 edition.

In May 2023, HCSS launched The Socio-Political Instability Survey, inviting over 500 think tankers from around the world to give their views on the short term likelihood and geography of global volatility using both multiple-choice and open questions. The results of the open-ended questions were gained through a process of quantitative and qualitative discourse analysis. With specified themes or coding categories determined by the authors. The most popular categories are those included in the most responses, but each response usually includes multiple categories. The survey was completed throughout the month of January 2025 and is the fifth iteration of the Observer since its inception in May 2023. Each survey will produce an 'Observer', like this document, highlighting key findings which will be available on the HCSS website.

### Take part in the next Socio-Political Instability Survey!

**Are you a geopolitics, economics, security, climate, area or international affairs expert affiliated with a think tank, university or research institute? Interested in taking part in the next Socio-Political Instability Survey? Sign up via the [Socio-Political Instability Survey page](#)**

### Selected References

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### Previous 'Observers'

1. <https://hcss.nl/report/the-socio-political-instability-observer-may-2023/>
2. <https://hcss.nl/report/the-socio-political-instability-observer-september-2023/>
3. <https://hcss.nl/report/the-socio-political-instability-observer-january-2024/>
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