



HCSS Survey

1

The Socio-Political Instability Observer

Results from the Socio-Political Instability Survey

July 2025



Source (from left to right): Israeli Iron Dome air defense system fires to intercept missiles over Tel Aviv [Image: Leo Correa/AP/picture alliance]. Service members of the 58th Separate Motorised Infantry Brigade of the Ukrainian Armed Forces attend military exercises at a training ground in Kharkiv region, Ukraine, on August 11, 2025 [Sofia Gatilova/Reuters]. Soldiers arrive at Allafah market, recently recaptured by Sudan's army from the RSF paramilitary, in the Al Kalalah district, south of Khartoum [AP Photo]. Chinese President Xi Jinping with European Council President Antonio Costa and European Commission President Ursula von der Leyen in Beijing, China July 24, 2025. China Daily via REUTERS

This 'Observer' factsheet outlines the results of the sixth 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](#).

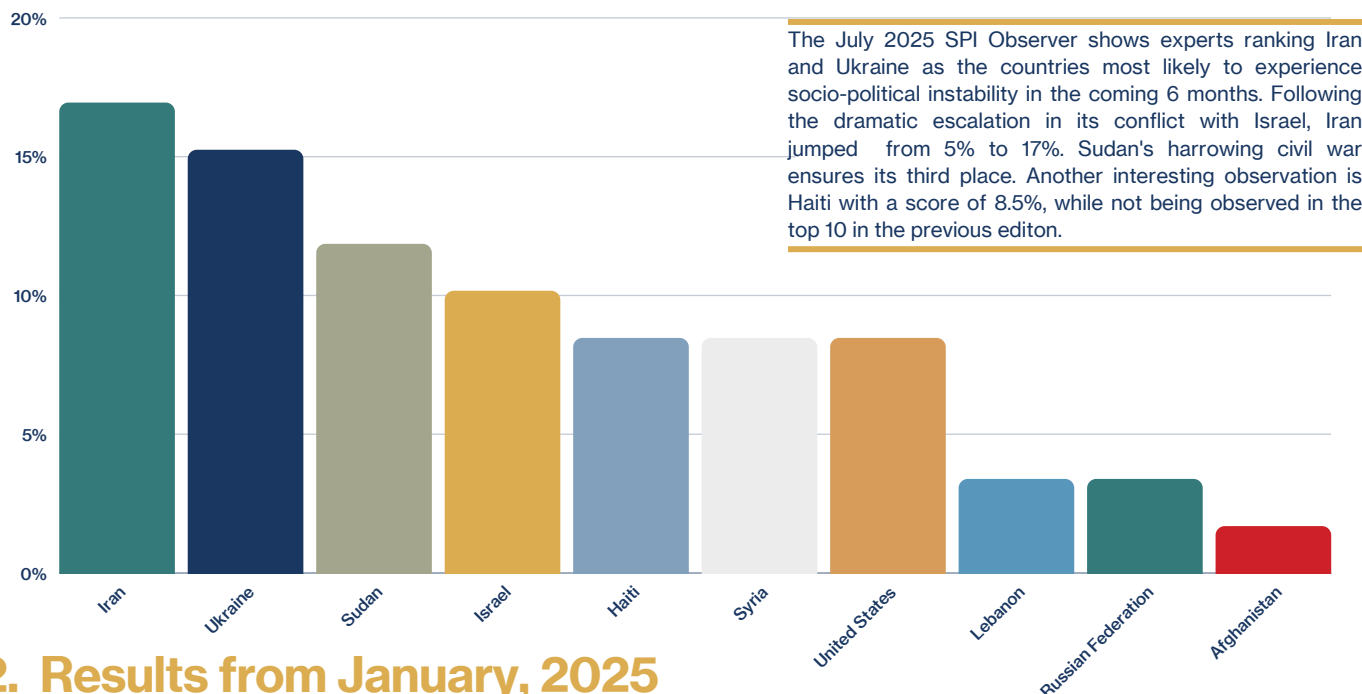
The July 2025 edition of the Observer series continues to monitor high levels of instability in Western Asia and Eastern Europe, caused by the war in Ukraine and the conflict in Gaza. The escalation of the conflict between Israel and Iran followed by American airstrikes on the Fordow nuclear plant weakened the Ayatollah's reign, bringing Iran to the top of the list of countries most at risk of further socio-political instability. Consequentially, military factors are once again seen as the main driver of global socio-political instability, once again surpassing economic factors now the unease and uncertainty surrounding US trade has receded into the background.

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 July, 2025

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

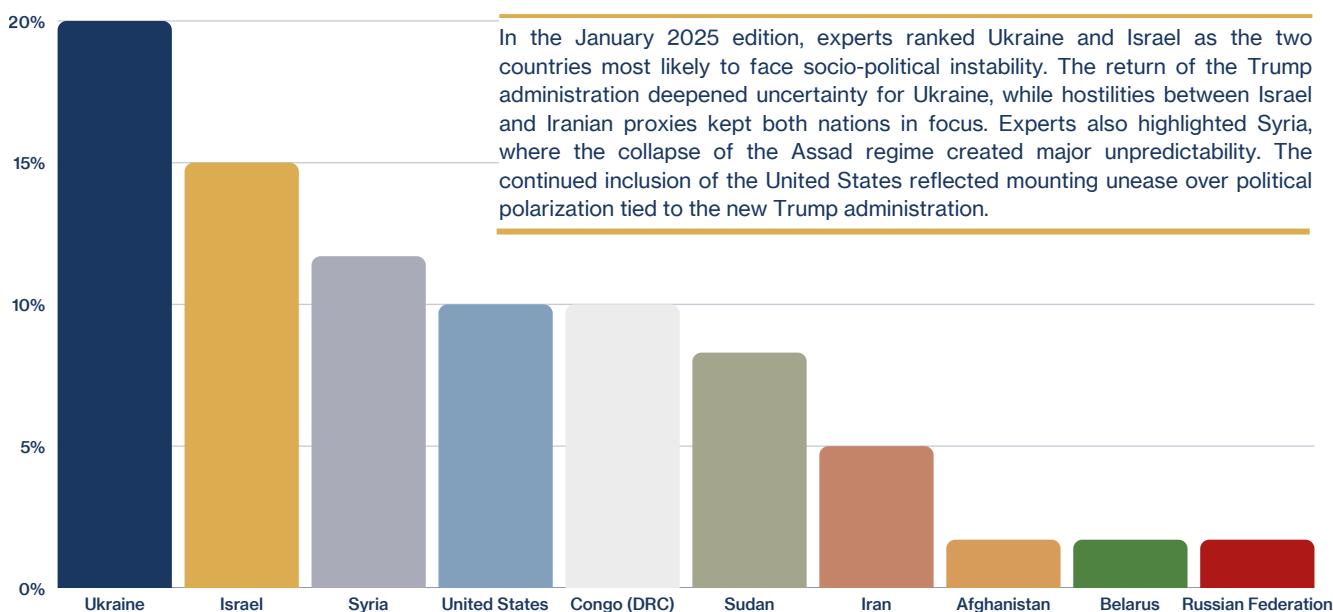
Answering the question: "Which country do you assess will have the highest socio-political instability over the next six months?", experts predict that Iran, Ukraine and Sudan would experience most socio-political instability in the following six months.



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 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:

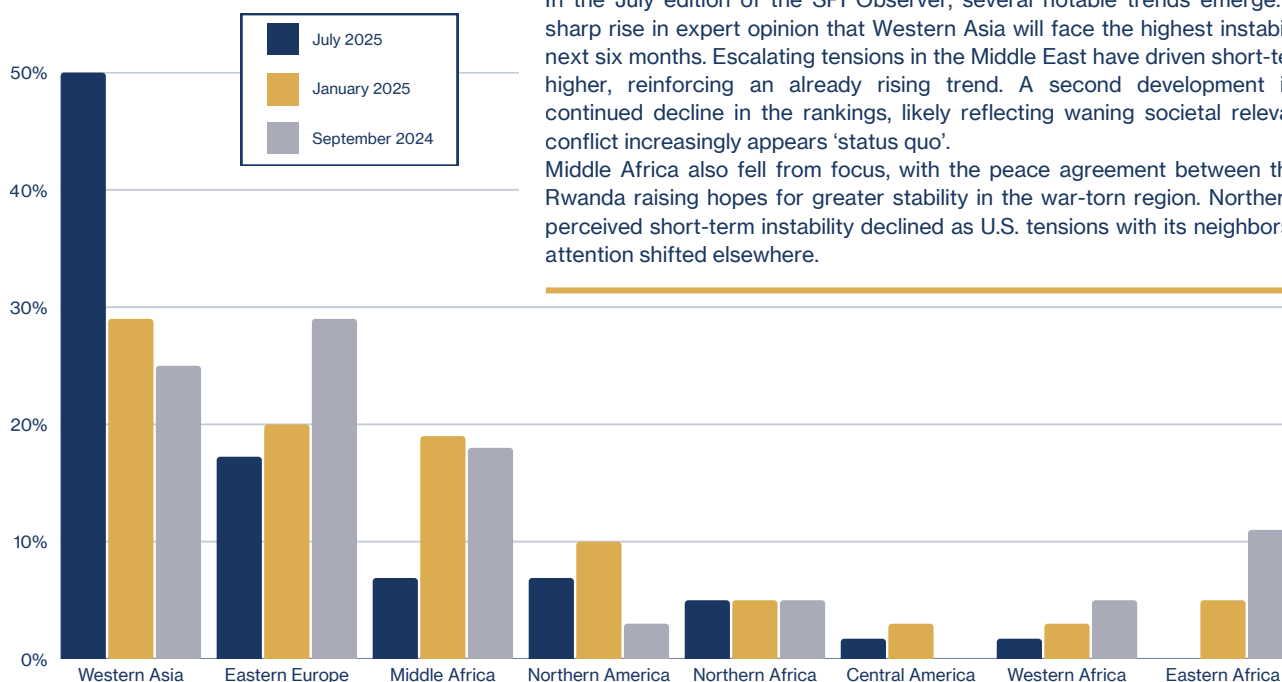
1. Ukraine 20%
2. Israel 15%
3. Syria 12%

Top 3 July 2025:

1. Iran 17%
2. Ukraine 15%
3. Sudan 12%

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 socio-political 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



In the July edition of the SPI Observer, several notable trends emerge. First is the sharp rise in expert opinion that Western Asia will face the highest instability over the next six months. Escalating tensions in the Middle East have driven short-term volatility higher, reinforcing an already rising trend. A second development is Ukraine's continued decline in the rankings, likely reflecting waning societal relevance as the conflict increasingly appears 'status quo'.

Middle Africa also fell from focus, with the peace agreement between the DRC and Rwanda raising hopes for greater stability in the war-torn region. Northern America's perceived short-term instability declined as U.S. tensions with its neighbors eased and attention shifted elsewhere.

Making sense of the results

Low scores for Africa despite major instability



The July 2025 SPI Observer shows very strong results for two regions: Western Asia and Eastern Europe. This is in stark contrast to the different African regions that had a combined score on expert opinion of 14%. This is odd when regions like Western Asia (50%) and Eastern Europe (17%) seem to get a far stronger focus, even though there has been a rise in instability throughout Africa over the last few years. Even Northern America, where there is currently no real conflict, scores higher than most African regions.

Across the continent, conflicts and clashes continue to cause deadly consequences: fighting between M23 rebels and DRC forces, the Sudanese civil war, and persistent jihadist violence in the Sahel. In Sudan alone, more than 150,000 people have died since the country descended into chaos in April 2023. These conflicts fuel overlapping humanitarian crises, with displacement and food insecurity among the most severe.

A potential explanation for this response might be the outsized attention this conflict gets in western media, which spans the geographic area of a large number of our respondents. African conflicts and crises remain underreported in the media, while the scale of the destruction eclipses those taking place closer to Europe. With the African continent bound to have an exponential demographic growth, the importance of these conflicts will only increase in the future, justifying increased attention.



The battle-scarred streets of Omdurman, part of the Khartoum metropolis in April. Credits: Ivor Prickett for The New York Times

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 socio-political instability over the next six months?", the experts predict that the United States, the Russian Federation and Israel will exert the greatest influence on global socio-political instability.



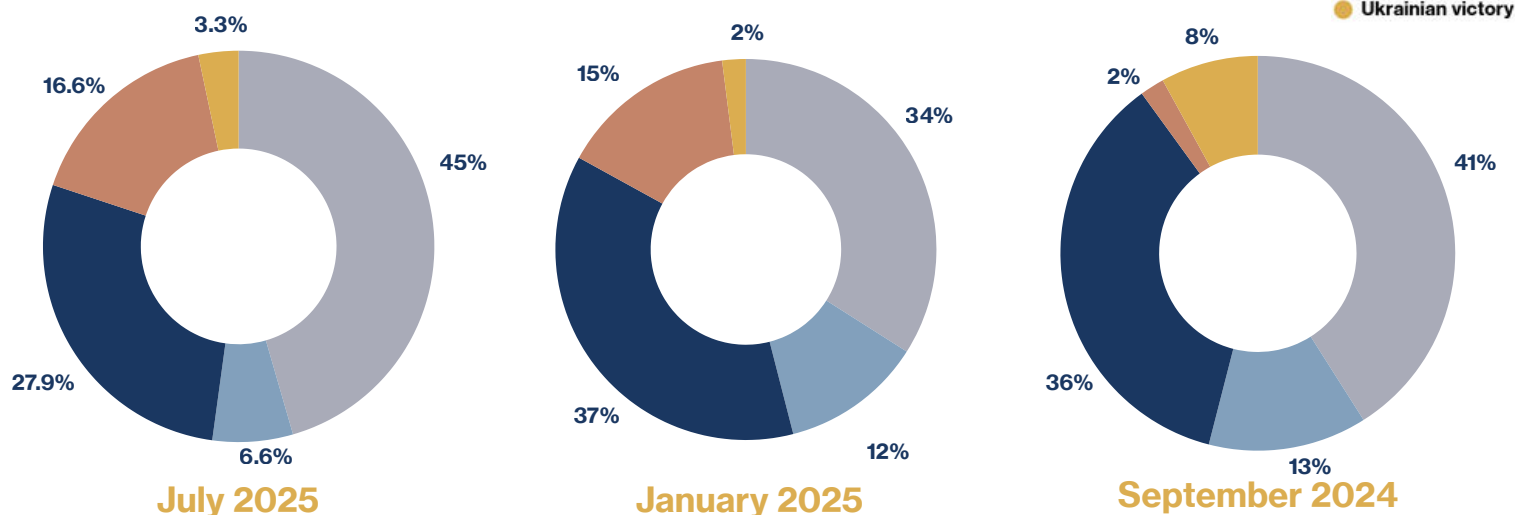
Following the inauguration of Trump's second term, experts again ranked the United States as the country most likely to drive short-term global socio-political instability. With fears of major trade wars easing, the U.S. share dropped by 15%. Still, Washington remains central to the conflicts in Ukraine and Gaza, while its trade policies continue to spark instability across countries and markets worldwide.

A notable trend is the limited relevance assigned to China as a driver of short-term instability. Despite ongoing great power competition, Beijing is not viewed as a key originator of acute instability, likely because expert focus remains on immediate crises and active conflicts, where China does not play an active role.

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.



Frozen conflict

"Peace talks leading to a cease fire in late 2025 or early 2026; resulting in a frozen conflict for the next couple of years"



More instability

"More instability", "Instability in Ukraine and Eastern Europe."



Russian victory

"Forced surrender of Ukraine..."



Ukrainian victory

"Russia returns to its internationally recognised territory Interim outcome..."



Peace deal

"A negotiated settlement with: some de facto but not recognized territorial concessions by Ukraine; a partial lifting of Western sanctions on Russia; an international peacekeeping contingent in Ukraine; and a NATO application freeze/withdrawal with the possibility for EU membership."

Main Drivers of socio-political instability

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

July 2025

1 Military

2 Economic

3 Demographic

4 Environmental

5 Diplomatic

January 2025

1 Economic

2 Military

3 Environmental

4 Diplomatic

5 Demographic



“

In this edition of the SPI, experts placed military drivers back in the top spot, as uncertainty over U.S. trade policy faded as the main source of instability. With major trade wars seemingly averted, attention shifted toward ongoing conflicts in Eastern Europe, the Middle East, and Africa.

Demographic factors also rose to third place, reflecting recognition of the challenges posed by refugee flows and humanitarian crises that continue to generate instability.

Meanwhile, diplomatic drivers dropped out of focus, underscoring the growing dominance of power politics in shaping the new world order.

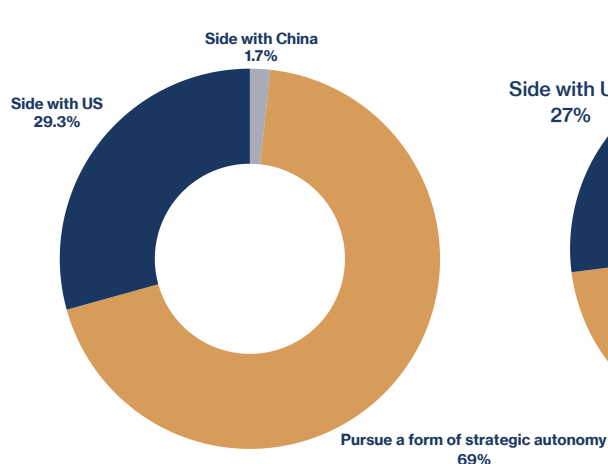
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Position that the EU should take in the strategic competition between the US and China according to the experts

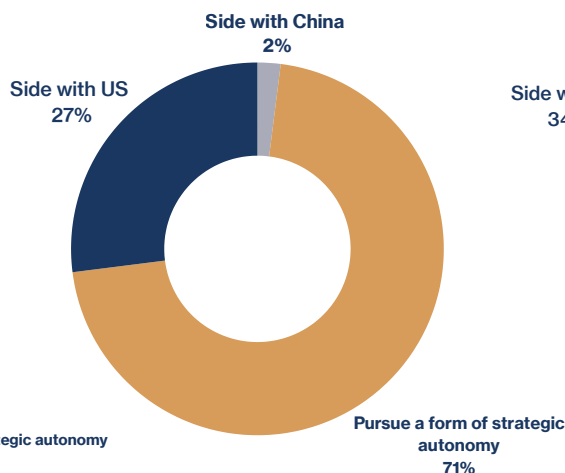
Answering the question: “Should the EU take a position in the strategic competition between China and the US, and if so which?”, most expert believe that the EU should pursue some form of strategic autonomy.

Analysis:

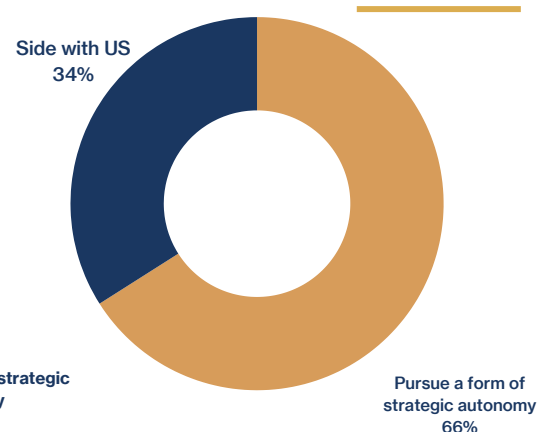
An easing of the volatility of the second Trump administration's trade and foreign relations policy has caused a correction of trends found in the previous edition. The percentage of respondents arguing for the EU to stick with the US has increased again, while moving towards strategic autonomy has dropped slightly.



July 2025



January 2025



September 2024



Side with China

“No, especially if considering current direction of Trump's administration. Better rebuild a working relationship with China.”



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.”

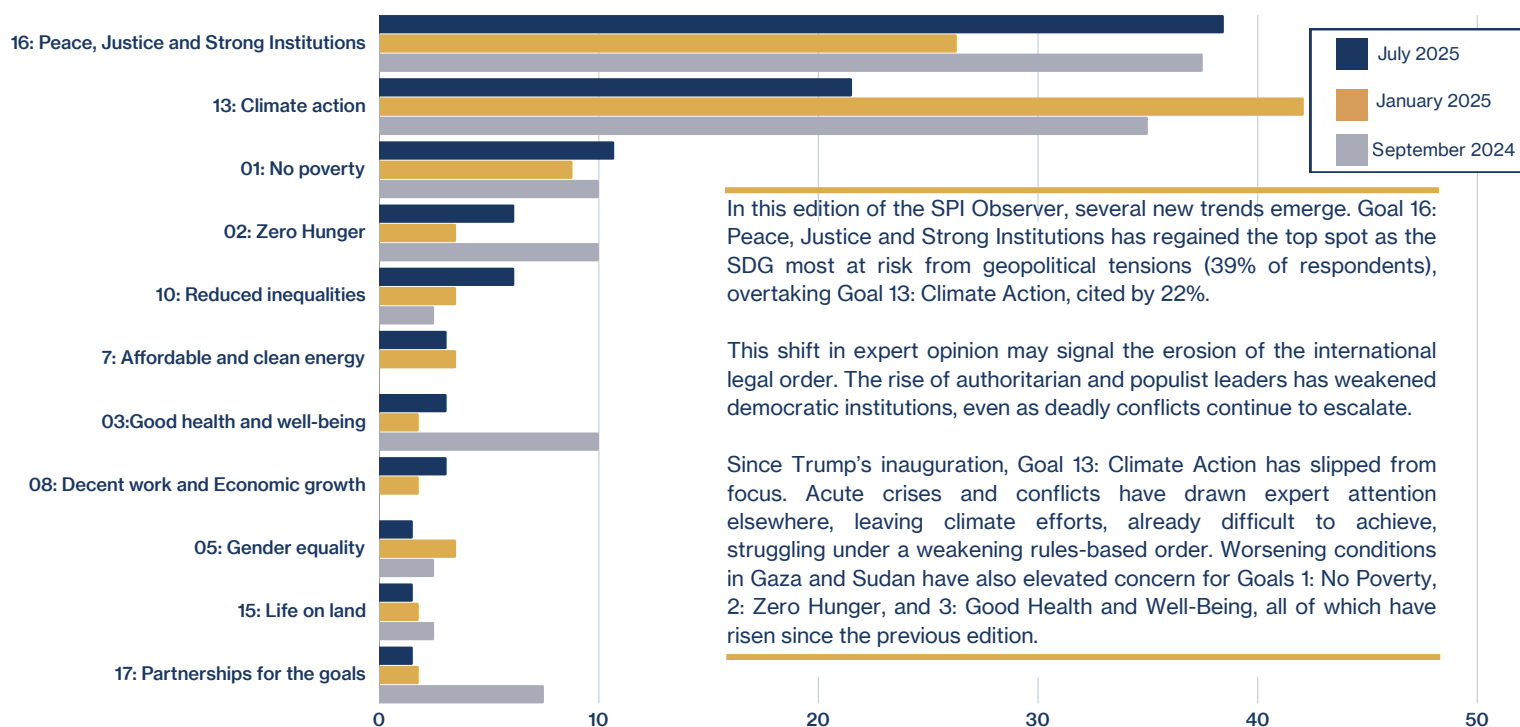


Side with US

“Yes. It should take the position of US to unite The West.”

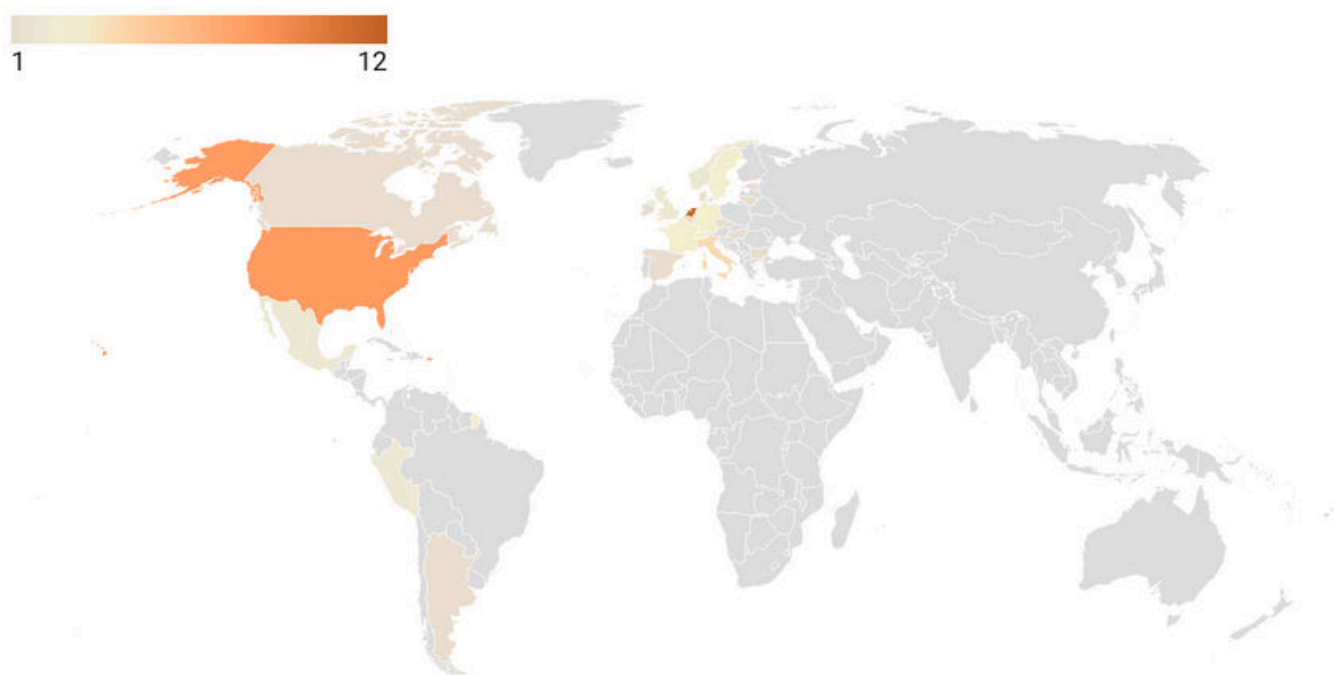
Sustainable Development Goals (SDGs) most negatively impacted in the next two to five years due to geopolitical tensions

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 16, Peace, Justice and Strong Institutions, 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, Belgium and Italy.



Created with Datawrapper

- 60 experts from universities, think tanks and research institutes completed this version of the survey.
- Our expert respondents reside in 23 different countries across 7 different regions.

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 July 2025 and is the sixth 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](#)

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/>
4. <https://hcss.nl/report/the-socio-political-instability-observer-september-2024/>
5. <https://hcss.nl/report/the-socio-political-instability-observer-january-2025/>

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July 2025

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