

# Global Risks to the EU 2026



Author  
**Veronica Anghel**

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Cover: President Donald Trump and President Vladimir Putin meet in Alaska, 2025.  
[DoD photo by Benjamin Applebaum, CC0.](#)



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1. Meeting between Ursula von der Leyen, President of the EC, and Donald Trump, President of the United States, G7 Summit, Canada. © European Union, 2025, CC BY 4.0.



2. A Polish tanker sits atop his T-72 battle tank during Exercise Steele Crescendo. © NATO North Atlantic Treaty Organization, CC BY 4.0.

## 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 security. First 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.

A target high-knowledge sample of 500 respondents rank the likelihood and expected impact of 30 predefined risks affecting EU security. By operationalising risk as a measurable construct and applying systematic scoring methods, this initiative aims to generate strategic foresight for European foreign policy. The survey is a yearly academic endeavour also meant to capture trends in threat perceptions among experts.

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 author is also grateful to the Council for European Studies (CES), the largest transatlantic community for the study of Europe, for distributing the survey, and to the Europe's Futures Initiative (EFI) for supporting this research.

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



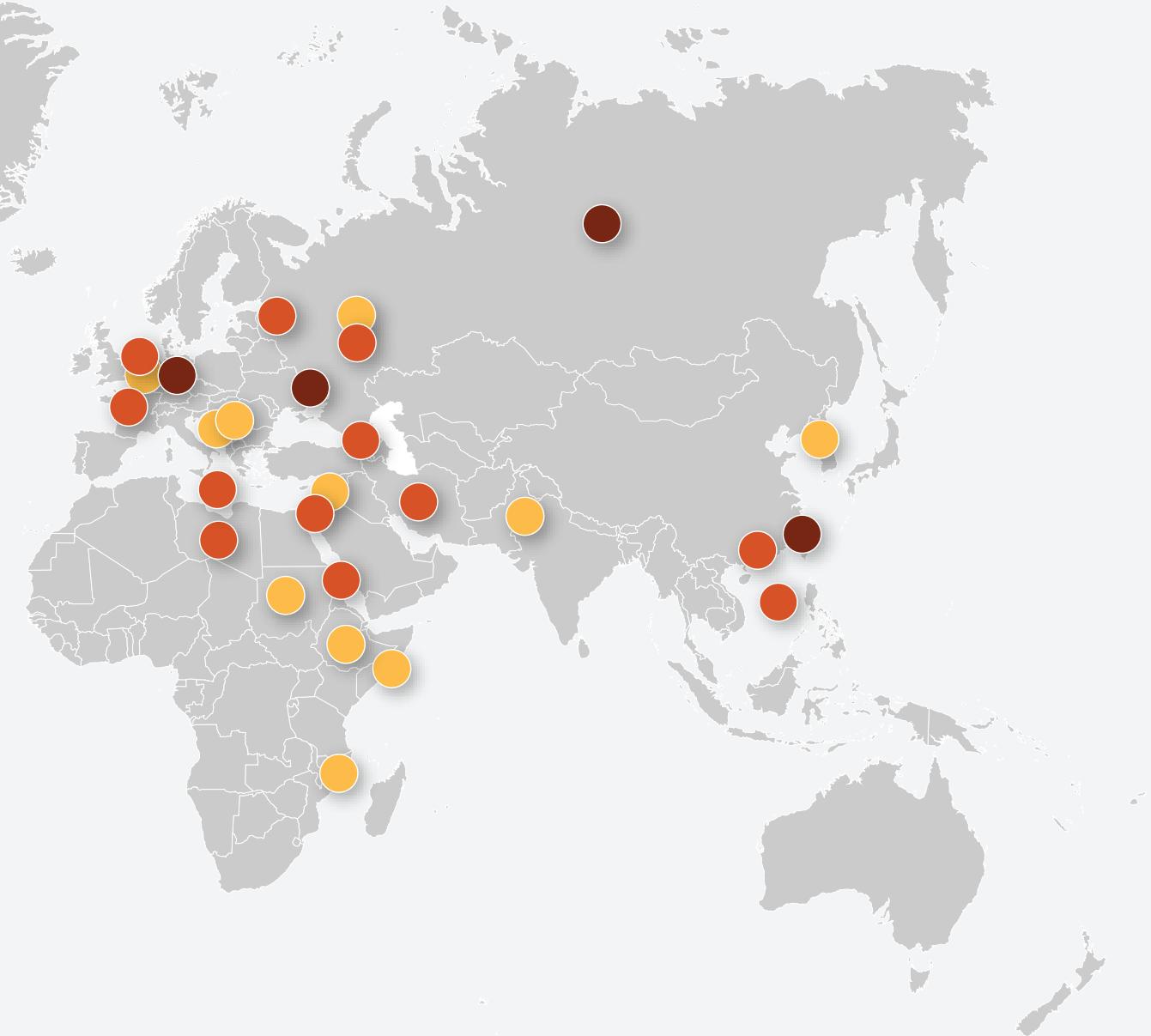
# Map of global risks to the EU in 2026

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

GLOBAL RISKS TO THE EU 2026

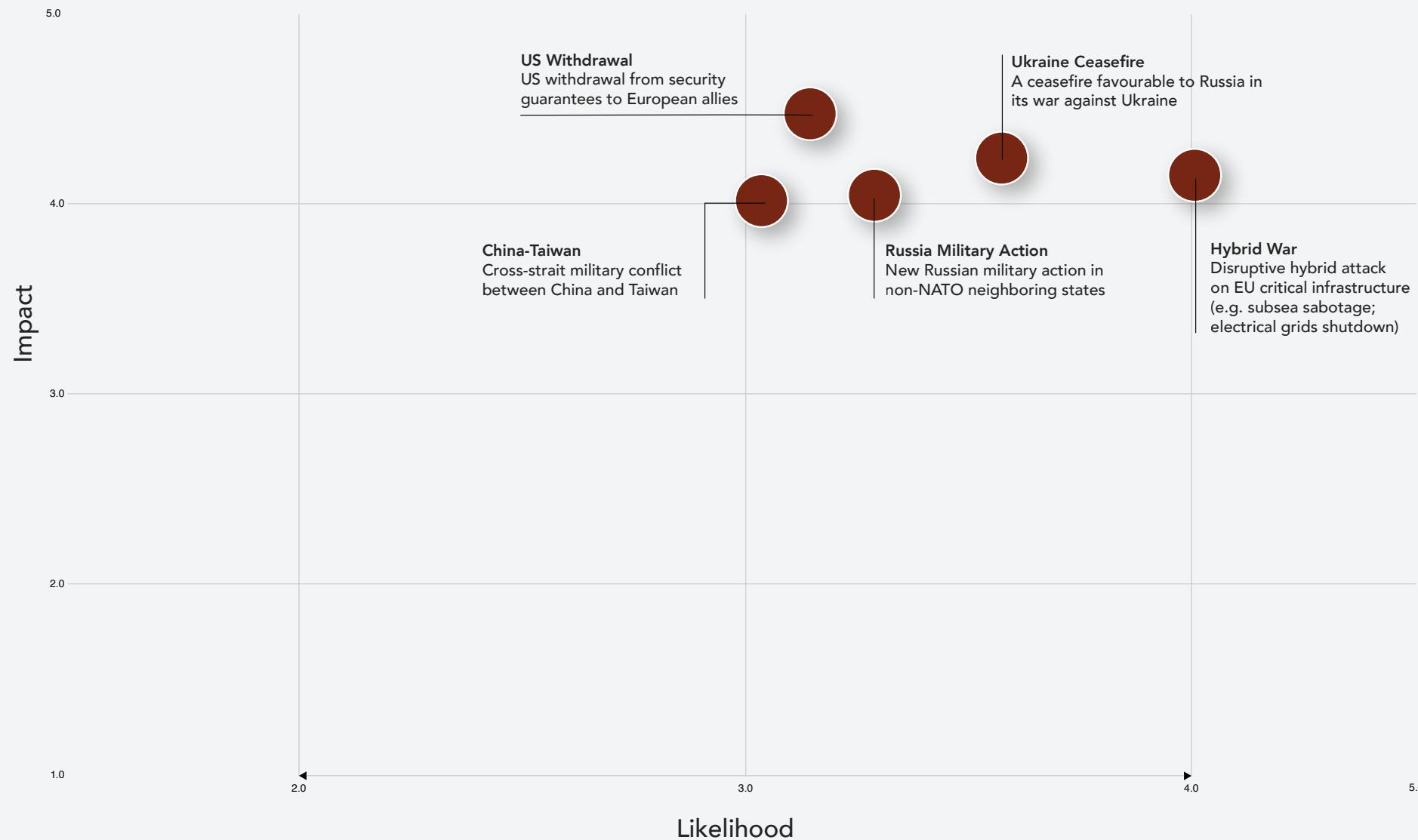


- High risk (dark red)
- Moderate risk (orange-red)
- Remote risk (yellow)



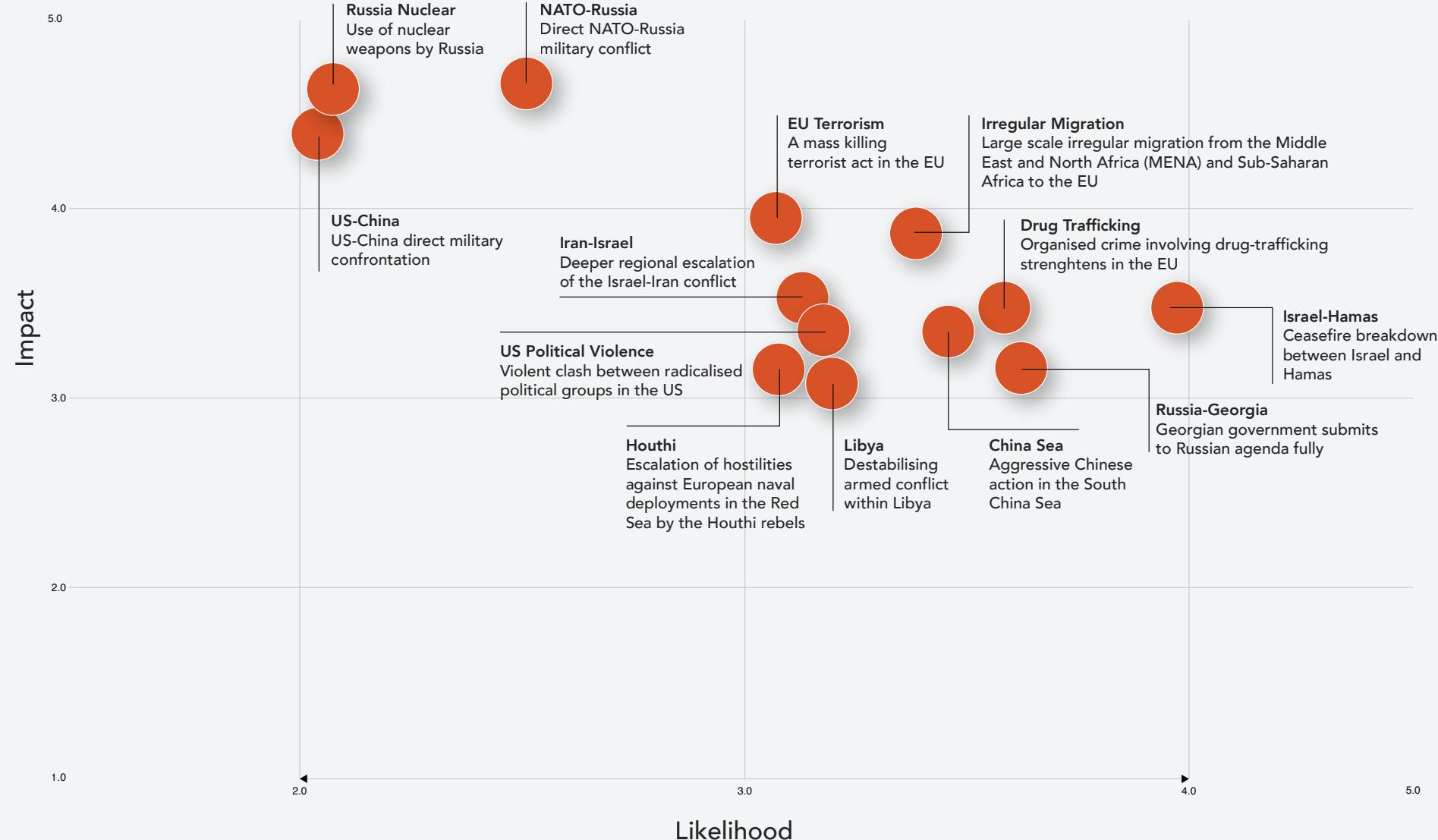
# High risks to the EU in 2026

GLOBAL RISKS TO THE EU 2026



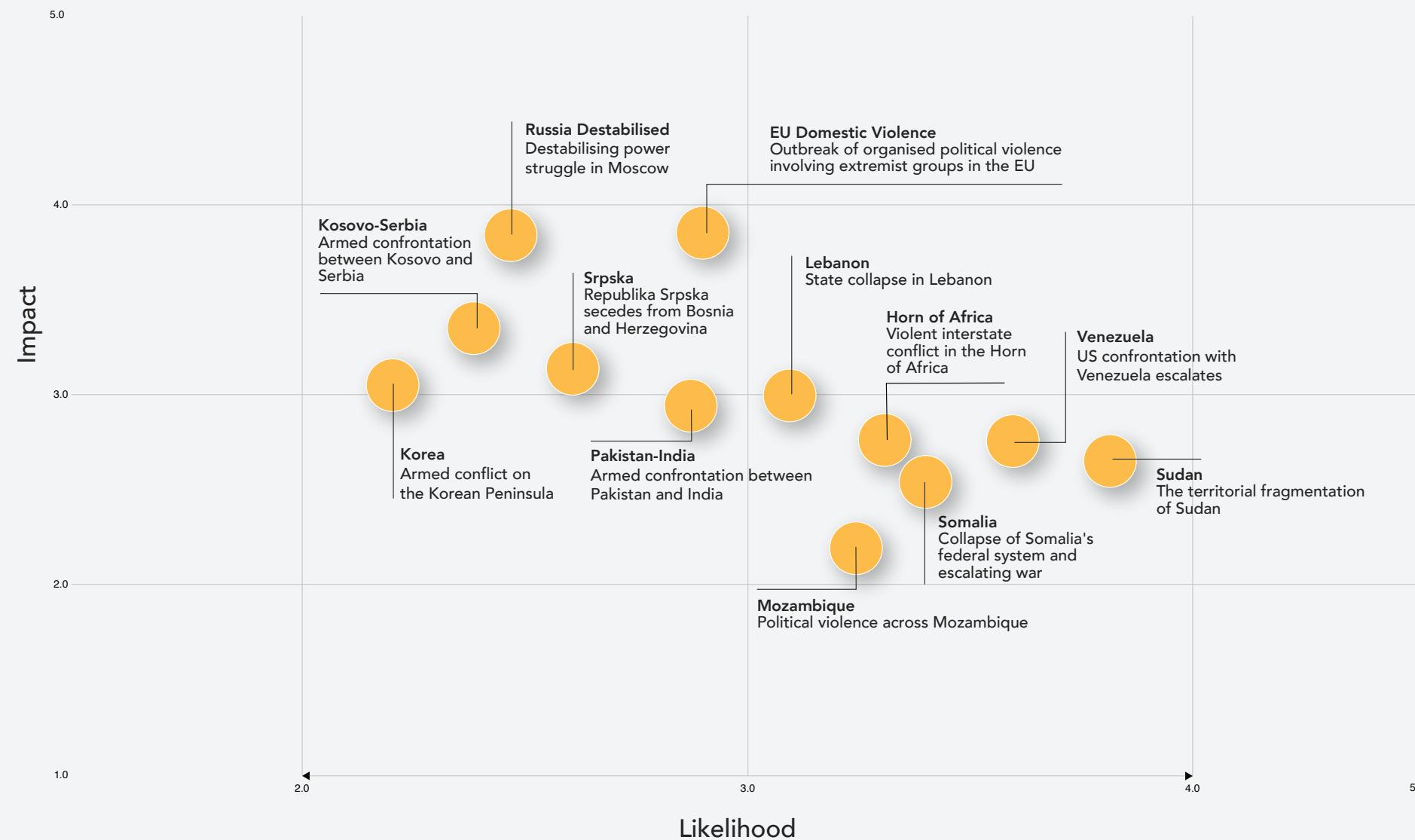
# Moderate risks to the EU in 2026

GLOBAL RISKS TO THE EU 2026



# Remote risks to the EU in 2026

GLOBAL RISKS TO THE EU 2026



# Principal findings

The 2026 risk map shows a sharp concentration of concern around hybrid warfare, the Russia–Ukraine war, and the reliability of US security guarantees. Combining likelihood and impact, five scenarios stand out as high risks to EU security in 2026: a disruptive hybrid attack on EU critical infrastructure, a ceasefire in Ukraine on Russia's terms, a US withdrawal from security guarantees to European allies, new Russian military action in non-NATO neighbouring states, and a cross-strait military conflict between China and Taiwan. Taken together, these results depict an EU that is most vulnerable not to a single spectacular war, but to **overlapping shocks that target its infrastructure, its neighbourhood, and its main security provider** at the same time.

**Hybrid warfare** is the EU's most likely threat and a top-impact risk. A disruptive hybrid attack on EU critical infrastructure – subsea sabotage, power-grid shutdowns, or similar – is rated the most likely scenario and one of the most damaging for EU security. Experts clearly expect hostile states and proxies to keep probing Europe's

cables, pipelines, and networks, and they doubt that current EU resilience measures are sufficient. **The centre of gravity of risk combines conventional military action with attacks on energy, digital, and transport systems**, suggesting that deterrence and defence now depend as much on redundancy, protection, and rapid repair as on classic military instruments.

**Russia-related scenarios** remain at the core of EU security concerns. A ceasefire in Ukraine favourable to Russia ranks high on likelihood and impact, making it one of the most consequential outcomes for EU security. Thus, experts reconfirm that **Ukraine's security is tightly linked to EU security**. EU security is threatened directly by a peace deal that would lock in territorial gains for Moscow, reward aggression, and undermine Ukraine's long-term viability as a sovereign, democratic state. A 'Russian peace' would also signal that the EU cannot shape its own security environment or deter future threats from Russia.

## Main takeaways

- A major strike on EU critical infrastructure is the top risk in 2026.
- A NATO–Russia clash is the highest-impact risk; yet, the EU must brace for a likely US withdrawal from security guarantees.
- Peace in Ukraine on Russia's terms and new Russian moves against non-NATO neighbours rank among the top threats.
- A China–US clash is rated least likely, despite high risk of cross-strait China–Taiwan clash.
- Experts see no durable Israel–Hamas ceasefire and a similarly impactful risk of wider Israel–Iran escalation.
- Organised crime around drug trafficking in the EU rising into medium risk.

For the second year in row, experts note a high risk of new Russian military action in non-NATO neighbouring states, an option rated more likely than a direct NATO–Russia clash and almost as damaging for EU security. A likely full submission of the Georgian government to a Russian-directed agenda adds to these perils. Together, these assessments suggest **experts expect Russia to keep redrawing security lines below the threshold of open war with NATO**, steadily eroding the security of states on the EU's eastern flank. In practice, this points to a drawn-out contest of attrition and pressure in the EU's neighbourhood.

The transatlantic relationship generates a stark vulnerability. A direct NATO–Russia war and Russian nuclear use are the two most impactful scenarios in the survey, but

they are least-likely events. By contrast, a US pullback from security guarantees to European allies remains as impactful as Russian nuclear use yet significantly more likely. For experts, the more probable shock in 2026 is not all-out war with Russia, but a weakening of US protection. This points to a structural vulnerability in Europe's security architecture: **its anchor ally is increasingly perceived as a major source of risk**. The findings implicitly endorse the debate on European defence capacity: while current US-backed NATO commitments continue to deter Russian aggression, the EU remains far from being able to replace US guarantees in the short term.

Tensions in the Indo-Pacific are climbing the EU risk agenda. Cross-strait military conflict between China and Taiwan is a

4. NATO flags flying at The Hague © NATO North Atlantic Treaty Organization, CC BY 4.0.



high-impact risk. Experts see aggressive Chinese action in the South China Sea as more likely, but less damaging for the EU. A direct US–China military confrontation remains a classic low-probability, high-impact tail risk – at the bottom on likelihood, near the top on impact. Taken together, these assessments suggest EU experts do not expect the United States to escalate to full military engagement on Taiwan's behalf. They also suggest **a view of Indo-Pacific crises mainly through the lens of economic disruption and alliance credibility**, with the EU more exposed as a trading power than as a direct military actor.

**Instability in the Middle East and North Africa weighs on EU security mainly through spillovers.** Experts see a breakdown of the Israel–Hamas ceasefire as one of the most likely scenarios of 2026, but its impact on EU security is rated only mid-range. A deeper regional escalation of the Israel–Iran conflict is judged less likely but more damaging. Houthi attacks on the EU ASPIDES military operation, which contributes to the protection of freedom of navigation – especially for merchant and commercial vessels in the Red Sea – rank as a moderate risk.

Large-scale irregular migration from the Middle East and North Africa, mass-casualty terrorist attacks in the EU, and strengthened drug-trafficking networks all sit in the medium risk band, seen as **major tests for EU cohesion and internal security**. Irregular migration in particular stands to be instrumentalised in polarised, conflictual politics across the EU. These results highlight that, for many experts, **the main danger from MENA crises lies in how they fracture European politics** and not only in the violence they produce on the ground.

Conflicts beyond Europe's immediate neighbourhood are often rated likely but less consequential. Territorial fragmentation in Sudan, collapse of Somalia's federal system, and violent interstate conflict in the Horn of Africa all score high on likelihood but low to moderate on impact. Somalia's resurgent Al-Shabaab and high tensions surrounding the May 2026 elections point to a real danger of further fragmentation and security deterioration. For the EU, the main risk is **a deepening security vacuum that undermines years of investment**, fuels regional instability, and tests its credibility as a long-term security and state-building partner. Similarly, the EU

4. President Trump and Ukrainian President Zelensky Clash During Meeting in Oval Office, 2025, CC0.



has attempted to remain active in Sudan through as of yet unsuccessful actions to prevent continuous and horrific human rights abuses; likely escalation will continue to undermine EU stabilization efforts in the region.

State collapse in Lebanon, renewed violence in Libya and Mozambique – where the EU maintains a military mission to support Mozambican armed forces, confrontation between Pakistan and India, and war on the Korean Peninsula are all ranked as remote risks for EU security in 2026. Experts expect continued or worsening violence in several of these theatres, but **they foresee only limited direct spillovers**.

Closer to EU territory, potential conflict in

the Western Balkans – whether through renewed confrontation between Kosovo and Serbia or a secessionist push by Republika Srpska in Bosnia and Herzegovina – sits in the lower tiers for both likelihood and impact. This downranking suggests that EU experts increasingly see the EU as forced to move away from local crises and **operate as a geopolitical actor in a great-power arena** shaped, above all, by the United States, China, and Russia.

The 2026 Global Risk map paints a picture of an EU that will remain busy with crisis management on multiple fronts while concentrating its strategic attention – and anxiety – on **its eastern flank, its infrastructure, and the future reliability of the United States**.



6. Forced displacement of Gaza Strip residents during the Gaza-Israel War, 2025, © Jaber Jehad Badwan, CC BY 4.0.

# Methodology

## Defining risks for EU security

The project's academic team identified the 30 most relevant potential risks to EU security in 2026 through a three-stage process. First, a horizon-scanning exercise for 2026 was conducted, building on the methodology and risk items assessed in the previous year. In line with previous waves, the exercise was coordinated with the US-based Council on Foreign Relations' *Preventive Priorities Survey*, which has evaluated global risks to US interests since 2008.

Second, the team refined the selection of risks to better reflect the European Union's current circumstances, as well as the missions and operations of the European External Action Service (EEAS). This involved removing risks from the previous year that were no longer pertinent, either because they had already materialised or because they had faded. The selected risks were not chosen solely on the basis of their likelihood or frequency but because their potential consequences were significant

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

## Launching the survey

On 6 November 2025, the survey received ethics clearance from the EUI Ethics Committee. Beginning on 12 November, the RSCAS, the EUISS, TEPSA, and EIIS distributed the survey within their expert communities. Additionally, the Council for European Studies and the Europe's Futures Initiative in Vienna circulated the survey to their expert members. The survey remained open for 15 days, during which the target of 500 unique, complete responses was exceeded. Respondents who were neither EU citizens nor EU residents were screened out, as were respondents who reported having no EU expertise. The final analytical sample comprised 501 respondents.



7. Xi, Putin, Kim at China's Victory Day military parade, 2025. © Kremlin.ru. CC BY 4.0



## Ranking and analysis

The project team used a five-point Likert scale to collect responses. The survey results were analysed using a standard risk assessment matrix, categorising risks as 'high', 'moderate', or 'remote'. The 30 risks were intentionally selected because they represented significant and realistic threats to the EU. As a result, their impact scores tended to be higher on average than their likelihood scores. For transparency and replication purposes, the data have been made publicly available on the [EUI Cadmus Repository](#).

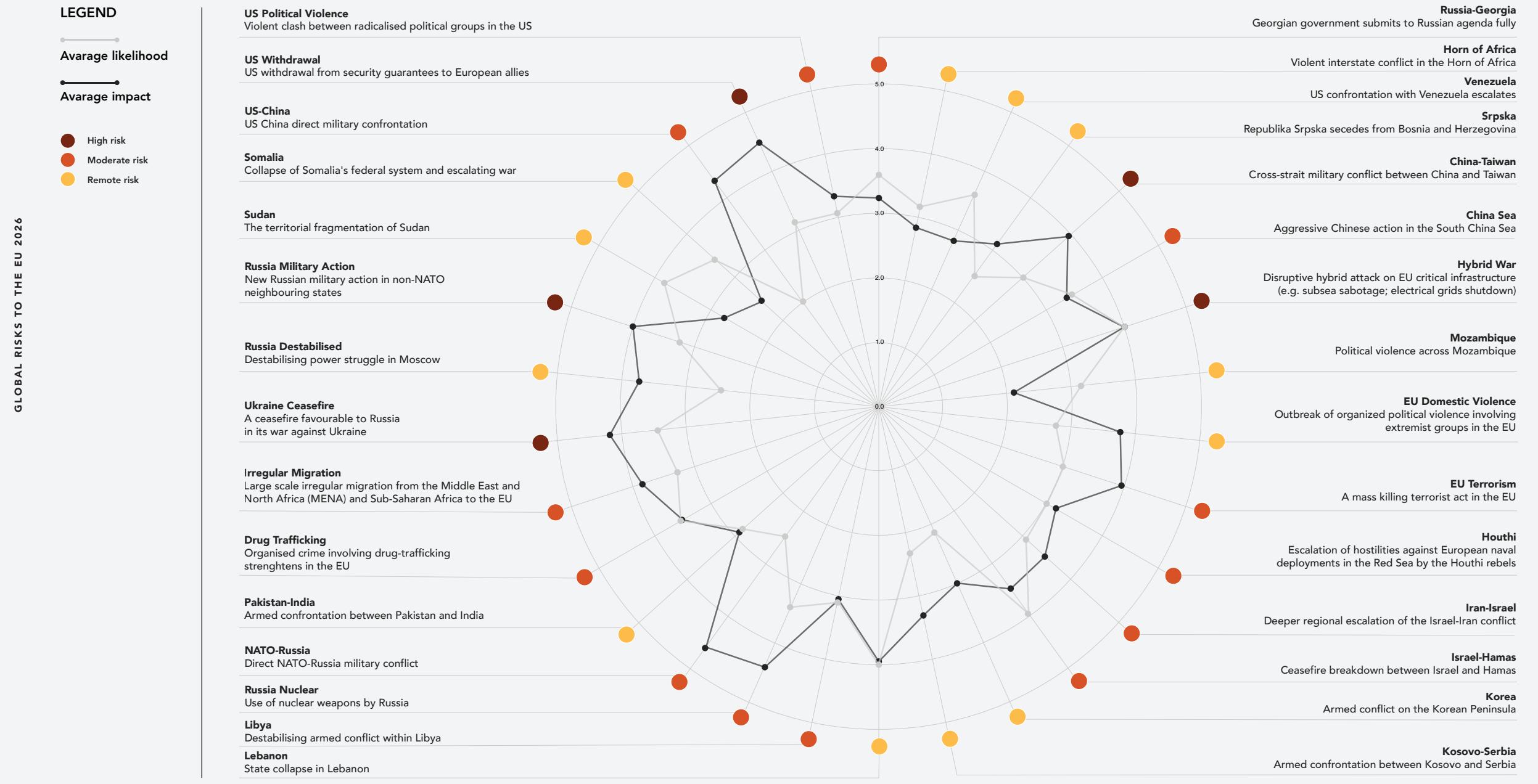


8. An aerial view of the Pentagon. © Air Force Staff Sgt. Brittany A. Chase. DOD. CC BY 4.0.

## Risk Assessment Matrix

	Impact	Likelihood
Impact	2	1
Likelihood	3	2
Impact	3	3

# Global risks to the EU 2026

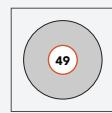


# 2026 sample

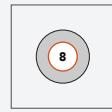
GLOBAL RISKS TO THE EU 2026

## Respondents in each country

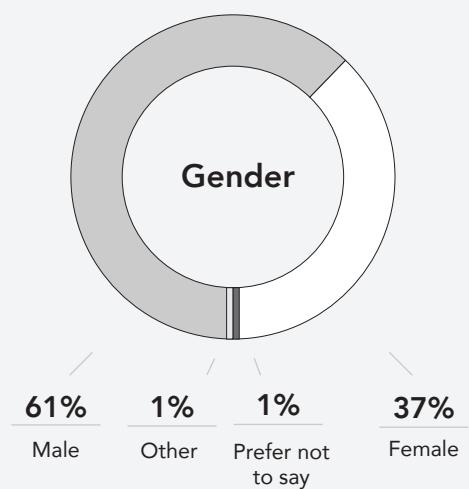
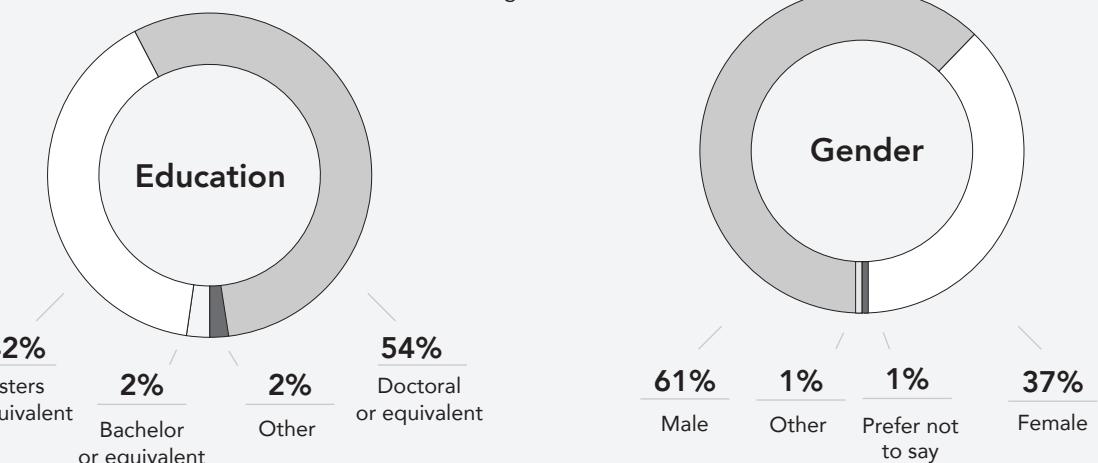
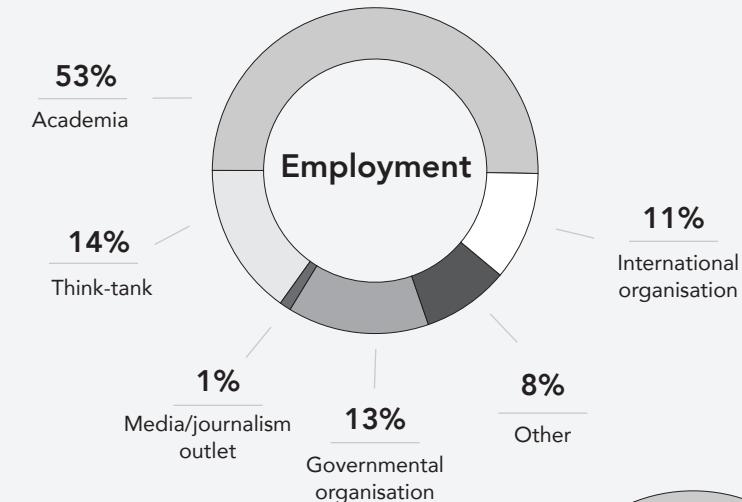
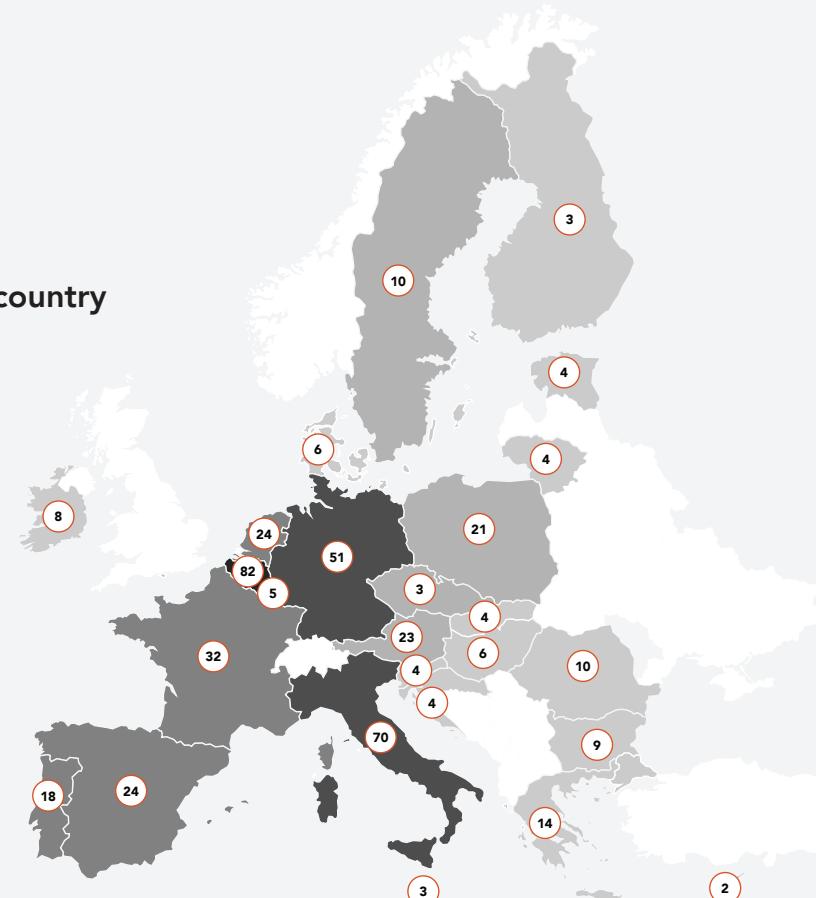
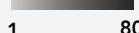
EU citizens outside EU



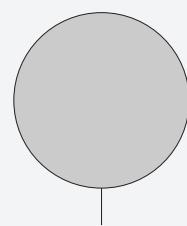
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Legend

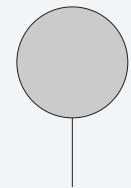


## Expertise



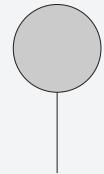
37%

EU foreign policy



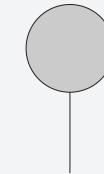
16%

Other EU expertise



13%

EU domestic politics



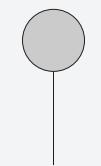
10%

Regional expertise outside the EU

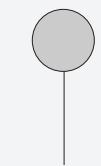


9%

EU economy



Single EU country expertise



Regional EU expertise

7%

# Institutional partners

## 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.iss.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/>

## The Europe's Futures Initiative

The Europe's Futures Initiative (EFI) is a membership-based organisation headquartered in Vienna. Designed to be a pan-European accelerator for innovation in policy, governance, and civic engagement, EFI is a policy powerhouse, deeply embedded in the European policymaking ecosystem. For further information about the EFI, visit <https://www.erstestiftung.org/en/projects/europe-s-futures-initiative-efi/>

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