

2030: What to Expect?

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The Ukraine War in a context of geopolitical fragmentation, resurgence of interstate conflicts and acceleration of technological breakthroughs have deeply transformed European security environment. In this context, the Institut de recherche stratégique de l'École militaire, IRSEM Europe (Brussels) led a collective foresight exercise among its institutional and academic networks.

OUR SURVEY

From 20th of November 2025 to 6th of January, 2026, **617 individuals** from the IRSEM Europe research community and the French Ministry of Defence (in France and abroad), including academic, institutional and military profiles were requested. **269 responded** to a mixed-methods questionnaire - composed of 18 quantitative and qualitative questions - , representing an answer rate of 44%, with a completion rate of 70%. In order to protect personal data, the detailed breakdown of respondents is not introduced, which partially limits the possibility of conducting a detailed analysis of internal variations. The results thus reflect aggregated perceptions.

ELABORATION OF THE SURVEY

This survey was elaborated based on strategic priorities, such as identified by the European Union (EU), its member states, and NATO. This results in the creation of categories of questions. It combines issues relating to prioritisation, risk assessment and forecasting up to 2030, using a semi-structured approach that combines closed-ended questions and open-ended fields. Qualitative responses were subject to thematic coding to enable their aggregation and identification of recurring trends. The results presented in this analysis should be understood as the expression of situated expert perceptions, and not as an objective or predictive measure of a future strategic environment.

OBJECTIVES



Capitalising a unique network

An exclusive and diverse group of stakeholders, which forms an unparalleled pool of collective experts



Building a shared vision of future developments

Consolidating strategic European priorities by 2030



MAIN LESSONS

- **Cumulative and interdependent threats** : respondents describe an environment in which interstate conflicts, hybrid threats and technological transformations combine and reinforce one another.
- **A focus on the European neighbourhood** : instability is seen as a priority in Europe's close environment, particularly on its eastern flank.
- **NATO as a lasting cornerstone of security**: the Alliance is seen as the main guarantor of European security, despite limited positive evolution within the EU on defence matters.
- **Persistent structural vulnerabilities** : the weaknesses identified relate to internal resilience - energy economy, technology - and transnational factors, such as climate and migration.

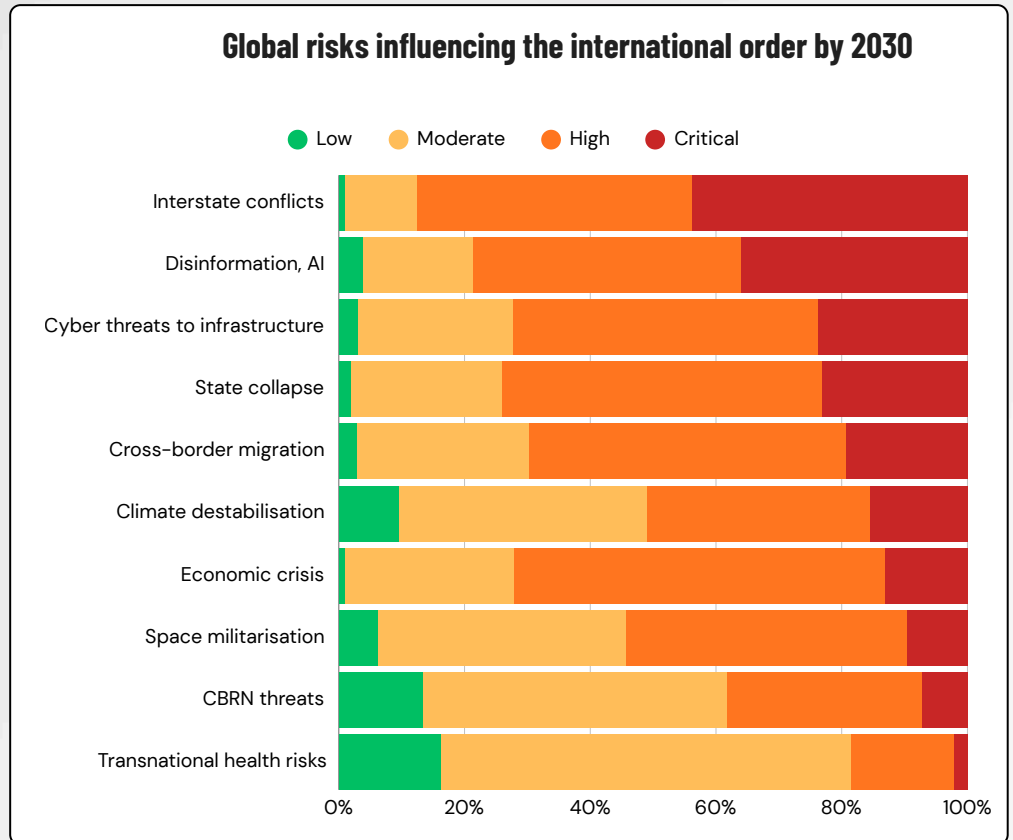
Mapping Threats and Dynamics of Instability

Hierarchy of threats: interstate conflicts and the rise of hybrid risks as major preoccupations

- The survey results confirm the priority status of threats linked to **interstate conflicts**, with a majority of responses falling into 'high' and 'critical' categories (42%).

State collapse follows a similar pattern, with a clear predominance of high ratings.

- This does not mean a return to the wars of the past - such as those of the Middle Ages - between separate states engaged in large-scale warfare without international regulation, but rather a move beyond that model through a resurgence of international conflicts in a world characterised by fluidity and technology. **Hybrid threats** occupy a similar position in the risk hierarchy: more than a third of respondents (37%) regard AI and disinformation as high and critical risks, whilst cyber threats to infrastructure account for 70% of high and critical assessments.



- It is also worth noting that **non-military risks** (economic crises and cross-border migration) are a significant cause for concern among respondents.

Conversely, climate and health risks, as well as the militarisation of space and chemical, biological, radiological, and nuclear (CBRN) threats, are viewed with greater caution, with responses more evenly split between 'moderate' and 'high' categories.

These findings reflect not so much a 'back to the future' dominated only by wars between states, but rather a perception of a convergence of threats, where technological breakthroughs are revolutionising the way wars are waged and opening up new battlefields: cyber, AI, space and CBRN. Financial and industrial vulnerability also emerges as a key factor of instability in the eyes of respondents.

84 %

of respondents consider interstate conflicts to be high or critical



2 %

only consider transnational health risks to be critical



Geographical dynamics : a regionalised environment

On Europe's doorstep, the accumulation of extended conflicts, political instability and humanitarian crises is turning external borders into areas of constant tension. Results indicate that respondents do not rank these risks exclusively but view them as **simultaneous and intertwined**. In this context, Europe's eastern and northern periphery, stretching from Ukraine to the Arctic, is perceived as the most unstable region by 2030.

Forecasts regarding **Ukraine reflect a clear pessimism**: nearly one in two respondents (49%) anticipate an unstable ceasefire, and more than a quarter (27%) expect persistent and localised fighting. This trend is confirmed by the fact that our experts identify Russia as the main threat to European security. This view is also reflected in France's 2025 National Strategic Review.

The Indo-Pacific area ranks second, with 54% of respondents forecasting a high level of instability by 2030. Despite the growing prominence of the Taiwan issue, the United States' strategic reorientation towards Asia and the particular attention that France pays to this region, the Indo-Pacific is still perceived as a crucial but relatively distant theatre. It is recognised as an area of major systemic rivalries, yet it does not replace the Eastern Neighbourhood in the hierarchy of priorities.

The Middle East and North Africa are predominantly perceived as sources of instability by 2030: nearly 87% of respondents associate them with a source of instability for Europe, with 38% viewing them as a major source. The prospect of stability or strengthened partnerships remains marginal.

Sub-Saharan Africa presents a similar view: nearly 89% of respondents identify it primarily as a factor of instability, mainly 'significant but secondary' (52%). Once again, the perception of growth and partnership remains in the minority.

These results tell that **the southern arc of Europe** is primarily identified as an area of chronic risk rather than as a strategic lever. Furthermore, aspects relating to interdependence are rarely highlighted, which may reflect Europeans' focus on the world across their immediate borders. Thus, **Latin America** is rarely mentioned by respondents, even though it plays a fundamental role in the fields of minerals and agriculture. This low visibility may reflect a primary focus on geographical areas perceived as directly linked to European security.

Among the respondents,

49%

think Ukraine will still be in a situation of regularly violated ceasefire in 2030



54%

think the level of instability in the Indo-Pacific region will be high in 2030

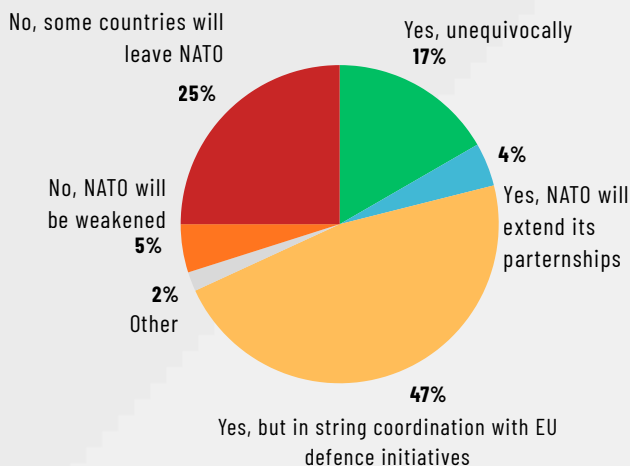


85%

perceive the regions of Middle East, North and Sub-Saharan Africa as a persistent and systemic risk environment



By 2030, will NATO remain the primary security guarantor for Europe?

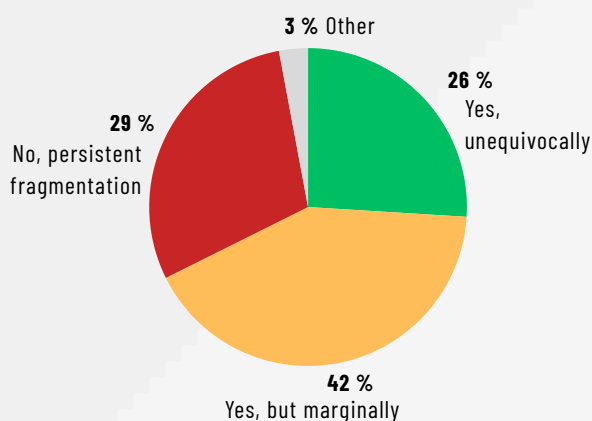


European security

According to respondents' projections, NATO remains the cornerstone of European security by 2030. Nearly half of them (47%) believe it will remain the primary guarantor of security, working in close coordination with the European Union's defence initiatives. Whilst 17% anticipate that its central role will be maintained 'without ambiguity', 25% nevertheless expect a scenario in which some countries might leave the Alliance. The hypothesis of structural weakening remains a minority view. These results suggest a dual interpretation: **the strength of the Atlantic framework is not fundamentally challenged but its future development is seen as dependent on political dynamics**, both in the United States and within European states.

Concerning the European Union, expectations appear more mixed. A relative majority (42%) anticipate only marginal progress in security and defence integration, whilst 26% expect clear and decisive integration. Nearly 30% of respondents remain sceptical and expect fragmentation to last. Overall, this depicts a **fundamental paradox: respondents expect the Union to play a greater role, but doubt its ability to achieve a sufficient level of integration to ensure its own security**. Europe is making progress, but without any clear strategic shift. NATO-EU coordination appears to be the most credible path, rather than a scenario of full autonomy or disengagement from the Atlantic alliance.

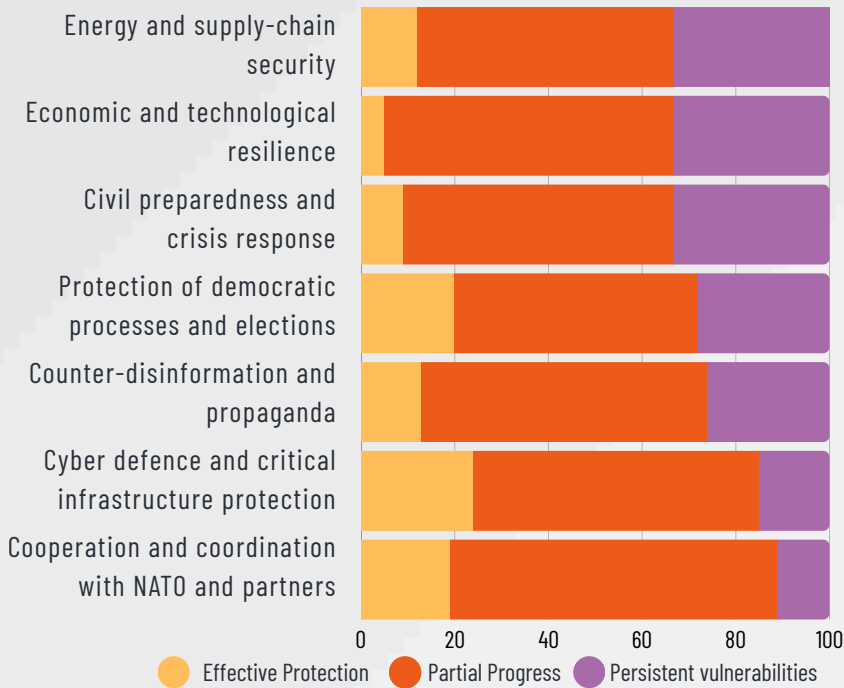
Will the security and defence of the EU be more integrated, aligned on the Strategic Compass?



Since 2022, European security and defence have been the subject of an unprecedented political and industrial drive. The survey results reflect this trend: the EU mostly evolves in an intermediate zone of 'partial progress', ranging from 52% to 70%, depending on the area. Cooperation with NATO constitutes the most stable foundation. This confirms that the Atlantic alliance remains regarded as the most solid cornerstone of European security.

The greatest vulnerabilities relate to the structural principles of power: energy security (34% of persistent vulnerabilities), economic and technological resilience (33%), and civil preparedness (33%). Perceived fragility therefore centres on internal resilience capabilities. The cyber field illustrates this ambivalence: it has the highest level of 'effective protection' (24%), yet is still predominantly classified as making partial progress (61%). Overall, the data points to a paradox: **the EU is investing, coordinating and making progress, yet remains exposed.** The difficulty does not lie in creating strategies and guidelines, but in the ability to transform these normative frameworks into operational capabilities that are consistent over time.

EU Protection against foreign interferences and hybrid threats



In your opinion, what are the key obstacles preventing the emergence of a genuine European defence by 2030?

"The key obstacle (...) is not the lack of resources or initiatives, but the lack of a shared strategic culture: without a common perception of the threat - a clear political authority and a willingness to pool defence sovereignty - Europe will keep coordinating on the military aspect without truly integrating."

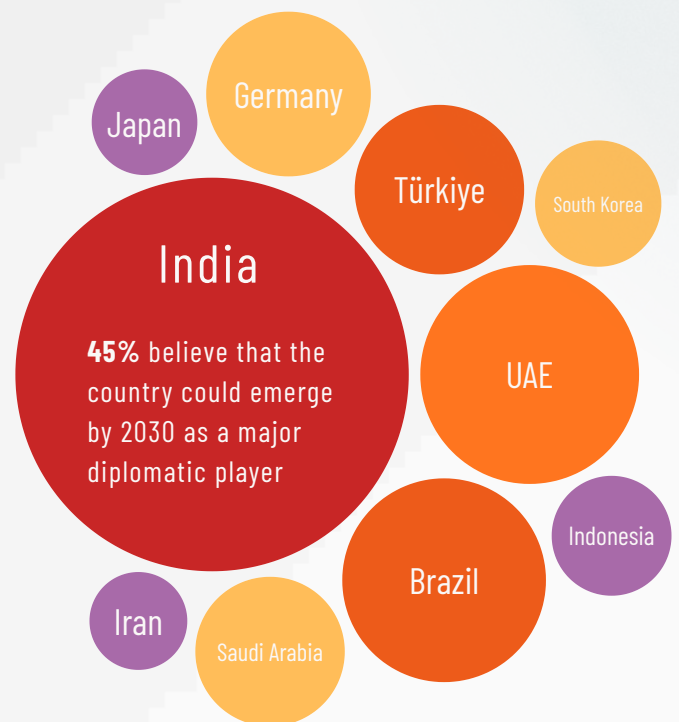
Anonymised extract of a respondent

Toward a Hybrid Restructuring of the International System

The rise of key players

In this changing world, a number of states are emerging as key players on the international stage. Among the emerging powers cited (excluding permanent members of the Security Council), India stands out clearly (97 mentions), far ahead of the United Arab Emirates (30) and Brazil (26). Beyond that, mentions quickly become scattered. This concentration suggests that respondents do not anticipate a diffuse multipolarity, but rather the selective rise of a few key players.

The interest of the Indian case lies in its positioning, based on a multi-aligned dynamic. The United Arab Emirates (UAE) and Brazil are part of a comparable dynamic. **This strategic freedom of choice illustrates the new capabilities to navigate between poles of power within a system and hierarchies in transition.**



- Majority of answers (97)
- Group 1 : 20 to 30 answers
- Group 2 : 10 to 20 answers
- Group 3 : >10 answers

Underestimated factors of instability that could become critical by 2030



Even though this survey was realised prior to the geopolitical evolutions concerning Venezuela, Greenland or the US-Israeli strikes against Iran, the US appear as the key factor of world instability.

1 The United States

Respondents first underline the rivalry with China. The US' first place is also explained by the fear of a partial withdrawal of Europe, president Trump's political unpredictability, as well as uncertainties concerning the US economic slowdown.

2 China

China ranks second. It is associated with competition with the United States, tensions surrounding Taiwan and in the South China Sea, as well as its central role in the global economy, which is creating greater dependencies.

3 Russia - Türkiye

Other actors have also been identified: Russia (25 mentions), for its strategic ambitions and its capacity to carry out hybrid attacks; and Turkey (14 mentions), for its expansionist ambitions.

Transnational structural pressures and risks multipliers

- **Climate change** (35 mentions) is identified as a risk multiplier, which is leading to extreme weather events, migration flows, resource shortages (water, food, raw materials) and conflicts.
- **Migration** (24 mentions), particularly from outside Europe, is considered as a risk factor exacerbated by climate events, instability and demographic pressures in Africa.
- Finally, the **demographic** issue (18 mentions) is raised to highlight the challenges posed by birth rates or population decline.
- Respondents also identify a number of factors contributing to instability that could affect **European states**: the rise of political extremism, the erosion of social cohesion and trust in institutions, disinformation, and the weakening of democracies in the face of foreign interference.
- On the **economic front**, these include public debt, inequality within the population, unemployment, competition for access to resources – particularly critical materials – and, finally, industrial and energy dependencies.

The new favoured means of expressing rivalries



Most quoted threat: artificial intelligence

Use in modern warfare, robotisation and drones, mass manipulation and disinformation (deepfakes, influence campaigns), infrastructure sabotage, decision-making autonomy, and privatisation in the fields of security and defence.



A factor that amplifies

AI is seen as a factor that amplifies these attacks, making it difficult to ascertain the truth and identify the sources. Digital dependence on GAFAM and the United States is highlighted as a strategic vulnerability, as is increased state surveillance of citizens.



Cyber threats

The cyber threats quoted are attributed to quantum technologies, the malicious use of biotechnology, and cyber attacks on infrastructure and networks.

CONCLUSION



Ultimately, contemporary perceptions are shaped by an increasingly conflictual interpretation of space. Physical control of territory and the drawing of borders are once again becoming the cornerstone of state strategies, **marking the abrupt return of conquest as a means of asserting power**. Now, this verticality of states clashes with a fluid and globalised space: the international order that has prevailed since the end of the Cold War is giving way to a state of permanent instability, where power is also defined by the ability to control flows. Finally, transnational dynamics – whether climatic, migratory or technological – no longer operate on the margins of politics. They are becoming the subject of rivalries and instruments of power. Territory is therefore no longer perceived as the space of conflict, but as the very stake in a struggle over representations and control, which makes every flow a potential threat to the stability of geographical entities.

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