Identifying and measuring the factors that drive peace

Global Peace Index 2026

Results & Trends

Conflict Spread

Economic Impact

AI, Conflict, and Peace

IEP Institute for Economics & Peace

Quantifying Peace and its Benefits

The Institute for Economics & Peace (IEP) is an independent, non-partisan, non-profit think tank dedicated to shifting the world's focus to peace as a positive, achievable, and tangible measure of human well-being and progress. IEP achieves its goals by developing new conceptual frameworks to define peacefulness; providing metrics for measuring peace; and uncovering the relationships between business, peace and prosperity as well as promoting a better understanding of the cultural, economic and political factors that create peace.

IEP is headquartered in Sydney, with offices in New York, The Hague, Abuja, Nairobi and Manila. It works with a wide range of partners internationally and collaborates with intergovernmental organisations on measuring and communicating the economic value of peace.

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Executive Summary

The 2026 Global Peace Index (GPI) finds that the world has continued its longstanding trajectory of deteriorating peacefulness, with armed conflict the dominant driver of the decline. There are now more active state-based conflicts than at any point since the end of the Second World War, while the number of countries involved in external conflict has nearly doubled since 2008.

World military expenditure has risen for the 10th consecutive year. While total deaths from conflict have declined from their 2023 peak, the past year still recorded the second highest number of conflict deaths since the inception of the Index nearly two decades ago. The civil war in Sudan, the protracted conflict in Ukraine, and the brief but consequential Twelve-Day War between Israel, the United States, and Iran have left the international environment in a more fragile and militarised state than at any point in the life of the Index.

This is the 20th edition of the GPI, which ranks 163 independent states and territories according to their level of peacefulness, covering 99.7 per cent of the world's population. Produced by the Institute for Economics & Peace (IEP), the GPI is the world's leading measure of global peacefulness.

This report presents the most comprehensive data-driven analysis to date on trends in peace, its economic value, and how to develop peaceful societies. It uses 23 qualitative and quantitative indicators to measure the state of peace across three domains: the level of *Societal Safety and Security*, the extent of *Ongoing Domestic and International Conflict*, and the degree of *Militarisation*.

Internationalised intrastate conflicts are becoming more frequent, having increased by more than 175 per cent since 2010. The number of countries involved in at least one external conflict in the previous five years has risen from 59 in 2008 to 103 in the 2026 GPI. Global deaths from internal conflict have risen more than sixfold over the period, from around 29,000 in 2008 to over 181,000 in the past year, with a peak of more than 309,000 in 2023. The number of countries recording 1,000 or more conflict deaths in a single year has grown from eight in 2008 to 20 in the past year.

The rise in conflict sits inside a broader structural transformation of the international system that IEP terms the 'Great Fragmentation', which began in the late 2000s. It is the third major period in geopolitical relations in the past 50 years, following the Cold War and the post-1990 era of rapid globalisation. The number of middle power countries has nearly doubled since 1991, from nine to 16, and the number of emerging powers has tripled. The combined material capacity of middle power nations now exceeds that of the great powers, while the share of global GDP held by the major European great powers has fallen sharply: Germany's halved from 8.5 to 4.3 per cent, while France's has dropped from 5.2 to 2.9 per cent, and Italy's from 3.8 to 2.2 per cent.

This year's results show that the average level of global peacefulness deteriorated by 0.7 per cent over the past year. This is the 12th consecutive year that global peacefulness has deteriorated, and the 15th deterioration in the last 18 years. Of the 163 countries on the Index, 99 deteriorated in peacefulness and 62 improved. There are now 119 countries that are less peaceful than they were in 2008.

Iceland remains the most peaceful country in the world for the 19th consecutive year, followed by New Zealand, Switzerland, Slovenia, and Ireland. Russia is the least peaceful country, with Sudan, the Democratic Republic of the Congo, Ukraine, and Israel completing the bottom five.

Western and Central Europe remains the most peaceful region, and the Middle East and North Africa the least peaceful. The Eastern Europe and Central Asia region was the only one of the eight GPI regions to improve on average over the past year, while South Asia recorded the largest regional deterioration, driven by falls in peacefulness in Nepal and Pakistan.

Poland recorded the largest country-level improvement, with its overall score improving by 9.1 per cent and the country rising 23 places to 22nd globally, driven by a 17.5 per cent improvement on the *Ongoing Conflict* domain. Gabon, Lesotho, Ukraine, and Türkiye recorded the next largest improvements, the last reflecting a sustained peace process between the Turkish government and the Kurdistan Workers' Party. Nepal recorded the largest deterioration, with its overall score falling by 9.1 per cent following the Gen Z protests of September 2025, followed by Chad, the Republic of the Congo, Pakistan, and Tanzania. The United States deteriorated by four per cent, mainly due to an increase in *political instability*, which deteriorated by 38.5 per cent. *Violent demonstrations* in the United States also increased substantially. The country is now ranked at 134th on the GPI.

Of the 23 GPI indicators, 14 deteriorated, eight improved, and one recorded no change. The *deaths from internal conflict* indicator recorded its largest single-year deterioration since the inception of the Index, worsening by 6.5 per cent. This year's Index only partially captures the impact of the 2026 Iran War, as many of the conflict indicators cutoff at the end of 2025. The *neighbouring countries relations* indicator recorded the second-largest deterioration, and *military expenditure (% of GDP)* deteriorated for the third consecutive year, as 97 countries increased relative defence spending.

The *UN peacekeeping funding* indicator recorded the largest improvement of any indicator, and total deaths from terrorism fell to their lowest level since 2008.

The world has become less peaceful over the past 18 years. Of the 163 countries on the GPI, 119 have deteriorated and 42 improved, and of the 23 indicators, 17 have deteriorated and six have improved. The *Ongoing Conflict* domain has deteriorated by 18.5 per cent and the *Safety and Security* domain by 3.2 per cent,

while the *Militarisation* domain has improved by 1.3 per cent on average. However, the *Militarisation* trend has reversed sharply since 2022, with much of the recent increase concentrated in Western and Central Europe.

The largest long-run deteriorations have been on the *violent demonstrations*, *external conflicts fought*, and *internal conflicts fought* indicators, which have deteriorated by 68.3, 63.5, and 44.7 per cent respectively since 2008.

The *refugees and IDPs* indicator remains high, with 117 million people forcibly displaced globally as of 2025, equivalent to one in every 67 people on Earth. The gap between the most and least peaceful countries has also widened, with the 25 least peaceful countries deteriorating by 18.9 per cent on average since 2008, while the 25 most peaceful deteriorated by just 0.3 per cent.

The historical mechanisms for ending wars are no longer working as effectively: the share of state-based conflicts ending in a peace agreement has fallen from 23 per cent in the 1970s to about four per cent in the 2010s, while the share ending in a clear victory has fallen from 49 to nine per cent over the same period.

With wars becoming more internationalised and harder to end, the risk of conflicts spreading and forming 'conflict clusters' is rising. This year's GPI sets out a nine-mechanism typology of how conflicts spread, organised into three categories: material factors such as the movement of people, weapons, and money across borders; relational factors of transborder ethnic kin, external state sponsorship, and ideological networks; and conditioning factors such as state capacity and prior contention.

There are eight clear conflict clusters around the world, with almost every single country in conflict being part of one of them. The Horn of Africa is the most prominent example of a regional conflict cluster, with all nine mechanisms operating simultaneously across Sudan, Ethiopia, Eritrea, Somalia, and South Sudan, linked by refugee flows, gold-smuggling networks, proxy sponsorship, and competing access to Red Sea ports.

Many modern conflicts are also at least partly self-financing: the production value of illicit drug economies in five major conflict-affected states more than quadrupled between 2015 and 2024, from approximately US$14 billion to US$59 billion, with Myanmar's methamphetamine and opium economy alone rising from US$10 billion to US$35 billion over the same period.

The economic impact of violence on the global economy in 2025 was US$21.8 trillion in purchasing power parity (PPP) terms, equivalent to 10.5 per cent of global GDP, or US$2,657 per person. This represents an increase of 3.2 per cent over the past year, owing largely to higher military expenditure. Military expenditure accounts for 43 per cent of the model at US$9.5 trillion, rising by five per cent in 2025, the largest single-year increase since the inception of the Index. In the 10 countries most affected by violence, the economic cost of violence averaged 23.4 per cent of GDP in 2025, compared with just 2.2 per cent for the 10 least affected. Expenditure on peacebuilding and peacekeeping totalled US$49.2 billion in 2025, the equivalent of just 0.5 per cent of total military spending in PPP terms.

IEP estimates that the impact of the Iran war in the first year at around 0.6 per cent of global GDP, smaller in headline terms than the Global Financial Crisis or the COVID-19 pandemic, with the greatest impact of the war falling on a group of fragile economies. The difference between a prolonged stalemate and renewed escalation is stark: successful diplomacy that prevents further conflict could deliver approximately US$2.2 trillion in economic benefits globally.

The 2026 GPI also examines how artificial intelligence (AI) is reshaping war and peacebuilding. Recorded drone strike events rose 115-fold between 2018 and 2025, with 565 different armed groups carrying out at least one drone attack in that period. Target-to-fire times using AI have fallen from around one day with cruise missiles in the 1990s to as little as five seconds with autonomous selection systems used in Ukraine and Iran.

The increasing use of AI in warfare is raising concerns about the erosion of meaningful human oversight in lethal decision-making. For example, algorithmic targeting in Gaza compressed the human review of AI-generated targets to roughly 20 seconds per strike, with one Israeli Defence Force system flagging 37,000 Palestinians as suspected militants, despite a 10 per cent known error rate and many strikes resulting in heavy civilian casualties.

The 2026 GPI therefore describes a global geopolitical system whose stress points are reinforcing one another. Geopolitical risks exceed levels of the Cold War, driven by heightened military spending, the diminished role of multilateral institutions, the tripling of trade restrictions, and increasing competition among major and middle powers.

Without a deliberate investment in the attitudes, institutions, and structures of Positive Peace, the trajectory of global peacefulness over the coming decade is likely to keep falling.

“

The historical mechanisms for ending wars are no longer working as effectively: the share of state-based conflicts ending in a peace agreement has fallen from 23 per cent in the 1970s to about four per cent in the 2010s.

Key Findings

Section 1 – Results

- The average level of peacefulness deteriorated by 0.7 per cent over the past year. This is the 12th consecutive year that global peacefulness has deteriorated.
- In the past year, 99 countries recorded a deterioration in peacefulness, while 62 countries recorded an improvement.
- There are now 119 countries in the world that are less peaceful now than they were in 2008. Conflict has been the primary driver of the deterioration.
- In the past year, peacefulness deteriorated sharply on the *Ongoing Conflict* domain but improved slightly on average on the *Safety and Security* and *Militarisation* domains. *Militarisation* improved mainly because of stronger commitments to UN peacekeeping operations.
- Of the 23 GPI indicators, eight recorded an improvement and 14 recorded a deterioration, with one registering no change. The largest deterioration was on *deaths from internal conflict*, followed by *neighbouring countries relations*, while the biggest improvement was on the *UN peacekeeping funding* indicator.
- There were 20 countries with over 1,000 internal conflict deaths in 2025, the highest number since the inception of the GPI, and a further 18 countries that recorded over one hundred deaths in the last year.
- *Military expenditure (% of GDP)* deteriorated for the third consecutive year. Ninety-seven countries increased their relative military expenditure, compared to just 44 that decreased it. Most of the increase occurred in countries in Western and Central Europe.
- Seven of the eight global regions deteriorated in 2025. Only Eastern Europe and Central Asia improved, despite the ongoing conflict between Ukraine and Russia.
- The *deaths from internal conflict* indicator recorded its largest deterioration since the inception of the Index, deteriorating by 6.5 per cent, with deaths increasing in 56 countries. In total there were just over 181,000 violent conflict deaths in 2025 driven mainly by the conflicts in Ukraine and Sudan.
- There are now 103 countries that were at least partially involved in some form of external conflict in the past five years, up from 59 in 2008. In most cases, countries were offering support to an existing government in its conflict with an internal armed rebel or terrorist group.
- Last year, peace in the United States deteriorated by four per cent, mainly due to an increase in *political instability*, which deteriorated by 38.5 per cent, the largest fall since the inception of the GPI. *Violent demonstrations* also increased substantially. It is now ranked at 134th on the GPI.
- Political violence in the United States has reached its highest level since the 1970s, with 85 per cent of Americans reporting that they believe politically motivated violence is increasing.

Section 2 – Trends

- Peace has deteriorated every year since 2014. Over this period, 113 countries deteriorated and only 49 improved in peacefulness. Forty-nine per cent of the improvements occurred in two regions: Western and Central Europe, and Eastern Europe and Central Asia.
- The gap between the most and least peaceful countries continues to grow, with 'peace inequality' widening by 11.7 per cent in the past two decades. The 25 most peaceful countries deteriorated by 0.3 per cent, while the least peaceful deteriorated by 18.9 per cent.
- Two of the three GPI domains have deteriorated since 2008, with *Ongoing Conflict* and *Safety and Security* deteriorating by 18.5 per cent and 3.2 per cent, respectively. Only the *Militarisation* domain had a marginal improvement.
- Though the *Militarisation* domain has improved since 2008, that trend has reversed over the last three years, as many countries respond to an increasing number of conflicts and rising geopolitical uncertainty. The largest increases have been in Western and Central Europe.
- Although the *Safety and Security* domain deteriorated, key measures of criminality have shown sustained improvement, most notably the *homicide rate* and *perceptions of criminality* indicators.
- The three indicators with the largest deterioration since 2008 are *violent demonstrations*, *internal conflicts fought*, and *external conflicts fought*.
- *Deaths from internal conflict* have increased more than sixfold since 2008, peaking in 2023 at more than 309,000. The number of countries recording at least 1,000 internal conflict deaths in a single year has grown from eight in 2008 to 20 in 2024.
- The *refugees and IDPs* indicator has deteriorated since 2019, deteriorating in six of the eight GPI regions. There were 117 million people forcibly displaced globally as of 2025.
- The impact of technological warfare is reflected in the decreases in the average *armed forces personnel rate*, which fell from 638 per 100,000 people in 2008 to 518 per 100,000 people in 2026.
- There have been three key geopolitical periods over the past 50 years: the Cold War, the rapid globalisation that began in the 1990s, and now the 'Great Fragmentation', which began at the start of the Global Financial Crisis.

- The geopolitical influence of European great powers is declining, most notably in the economic sphere. Between 1995 and 2023, Germany's share of global GDP fell by 49 per cent, France by 44 per cent, Italy by 42 per cent, and the United Kingdom by 27 per cent.
- Middle powers are filling the gap left by declining European influence. The rising middle powers, including the United Arab Emirates, Indonesia, Türkiye, and Mexico, are less likely to be as closely aligned to the United States than more established middle powers such as Australia.
- Geopolitical risks exceed levels of the Cold War, driven by heightened military spending, the diminished role of multilateral institutions, the tripling of trade restrictions, and increasing competition among major and middle powers.

Section 3 – Economic Impact of Violence

- The global economic impact of violence was US$21.8 trillion in constant PPP terms in 2025, equivalent to 10.5 per cent of global GDP, or US$2,657 per person.
- The 2025 result represents an increase of 3.2 per cent from the previous year, largely driven by an increase in military expenditure across most regions of the world.
- In the 10 countries most affected by violence, the economic cost of violence averaged 23.4 per cent of GDP in 2025, compared to just 2.2 per cent for the 10 least affected countries.
- Expenditure on peacebuilding and peacekeeping was US$49.2 billion in 2025, just 0.5 per cent of total military spending in purchasing power parity (PPP) terms. While this has increased from US$37.3 billion in 2008, peacebuilding and peacekeeping continue to receive only a small share of total violence containment expenditure.
- Military and internal security expenditure accounts for 73 per cent of the total economic impact of violence. Military expenditure accounts for 43 per cent of the model, or US$9.5 trillion.
- Military expenditure increased by 5.8 per cent in 2025, the largest single increase since the inception of the GPI nearly 20 years ago.
- Since 2008, the component of the economic model to experience the greatest increase was conflict deaths, whose cost rose by 459 per cent. The economic impact of conflict deaths, GDP losses, and refugees and IDPs have each more than tripled in the last 17 years.
- Between 2024 and 2025, the economic impact of refugees and IDPs rose in 100 countries, with an average increase of 23 per cent, while military expenditure rose in 126 countries, with an average increase of 14 per cent.
- The economic impact of the Iran war could be substantial, but unevenly distributed. Global GDP losses in the first year are estimated at 0.6 per cent, smaller than the Global Financial Crisis or the COVID-19 pandemic, but with impacts concentrated overwhelmingly among a narrow set of fragile economies.
- Successful diplomacy to end the Iran war could be worth more than two trillion dollars to the global economy. Annual global GDP losses from the war would total US$1.3 trillion under a partial reopening of the Strait of Hormuz but would amount to US$3.5 trillion if the war resumes. The gap between the two is the quantifiable price of preventing escalation.
- The impact of the Iran war on food production is yet to be fully felt. Gulf states supply 45 per cent of global sulphur and 50 per cent of global urea; the reduction in supply hits as Q2 2026 planting begins across South Asia and East Africa, so the harvest shortfall will hit in late 2026 and early 2027.
- The full economic impact of the Iran war might not be felt until the end of the year. Pakistan, Egypt, and Kenya face US$5.1 billion in debt rollovers in November and December 2026, alongside disrupted harvests.

Section 4 – How Conflicts Spread

- The number of conflicts is at its highest point since the end of World War II, with 61 active state-based conflicts in 2024, with the number having doubled in the last 15 years. The expansion has been driven almost entirely by internationalised intrastate conflicts, which have increased by more than 175 per cent since 2010.
- The number of countries involved in at least one external conflict in the previous five years has risen from 59 in 2008 to 103.
- There were 20 countries that recorded at least 1,000 deaths from conflict in the past year. Many of these conflicts are entangled with other conflicts or countries beyond their borders, as seen in the Democratic Republic of the Congo, Burkina Faso, Pakistan, and Sudan.
- The spread of conflict is not automatic. Whether a war crosses a border depends on specific mechanisms and on the resilience of neighbouring states.
- The factors that drive the spread of conflict can be divided into three categories: material factors that move people such as weapons and money; relational channels of ethnic kin, sponsorship, and ideology; and factors such as state capacity.
- Some of these mechanisms have increased significantly in recent years. Drug economies in conflict zones have quadrupled in a decade, from US$14 billion in 2015 to US$59 billion in 2024. The size of the drug economy in Myanmar alone increased from US$10 to US$35 billion over the past decade.
- The Horn of Africa is no longer a set of separate conflicts. The conflicts in Sudan, Ethiopia, Eritrea, South Sudan, and Somalia are now interlocked through every channel that causes conflicts to spread.

- The Sudanese civil war is the world's most severe humanitarian crisis, with over 12 million people displaced. The influence of external actors and illicit economies has increased the severity of the conflict.
- Self-financing makes the war in Sudan difficult. The RSF's gold revenues mean that withdrawing external sponsorship would not stop the fighting, and the rising gold price to over US$5,000 per ounce increases the incentives to continue the conflict.
- The Iran war is a force multiplier for the spread of conflict. It has amplified existing pathways by raising prices in import-dependent states, distracting Gulf countries who are supporting conflict, and highlighting the strategic importance of Red Sea ports.

Section 5 – AI, Conflict and Peace

- Artificial intelligence is reshaping both peace and conflict. As the level of conflict globally reaches record levels, AI-enabled war infrastructure is already in the field, while AI for Peace remains fragmented and underfunded.
- Drones have become the defining weapon of modern warfare, spreading faster than any government can keep up with. Drone attacks rose roughly 11,500 per cent between 2018 and 2025, and 565 different armed groups carried out at least one attack in that period.
- Target-to-fire times have dramatically reduced, from one day in the 1990s using cruise missiles to five seconds using the Russian V2U autonomous selection system.
- Human oversight of AI targeting is increasingly being phased out. The Israel Defence Force's (IDF) Lavender system flagged 37,000 Palestinians as suspected militants in Gaza, with operators reportedly spending around 20 seconds per target despite a 10 per cent error rate.
- Military AI procurement is expanding rapidly. The Pentagon's Maven Smart System contract ceiling rose 165 per cent in 12 months, reaching roughly US$1.3 billion by May 2025.
- Multi-domain warfare at machine speed is now increasingly common. In the first 12 hours of Operation Epic Fury, 200 Israeli aircraft struck 500 targets, and US forces conducted 900 strikes.
- The international community remains largely unprepared or unwilling to adopt basic humanitarian AI governance. Of 193 UN Member States, 118 are not participating in any of the seven leading AI governance initiatives.
- AI capability and capital are concentrating in a handful of states and firms, as are the AI military capabilities. US private AI investment hit US$109 billion in 2024 against China's US$9.3 billion. AI for Peace funding is several orders of magnitude smaller.
- AI's physical footprint is rapidly reshaping global energy systems. Data centre electricity use is projected to reach 945 terawatt-hours by 2030, a doubling from 2024. Ireland's data centres already consume 22 per cent of national metered electricity.
- Military capabilities are evolving faster than the legal and governance frameworks meant to regulate them, and the role of human judgement within these systems is becoming less certain.
- Frontier AI models systematically prefer escalation in simulated nuclear crises. In a study of 21 nuclear-crisis scenarios across three frontier models, 95 per cent featured nuclear signalling and 76 per cent strategic nuclear threats.
- The spread of AI-enabled autonomous weapons systems to less-regulated militaries poses a serious threat to civilian populations and increases the risk of expanding battlefield areas.
- Military AI logistics and predictive maintenance will be strategically deployed to forecast ammunition use, anticipate equipment failure, and re-allocate supply across a theatre.
- The concept of AI for Peace is not well understood, and funding is inadequate and fragmented.
- AI for Peace applications include mediation, translation, conflict analysis, satellite technology, atrocity documentation, community resilience, demining, and post-conflict reconstruction.
- AI is also opening new forms of accountability. Yale's Humanitarian Research Lab used satellite imagery to track 19,500 Ukrainian children deported to 210 Russian and Belarusian facilities.

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103 There are now 103 countries in the world that are less peaceful now than they were in 2008. Conflict has been the primary driver of the deterioration.

Improvements	Deteriorations
62	99

In the past year, 99 countries recorded a deterioration in peacefulness, while 62 countries recorded an improvement.

There were 20 countries with over 1,000 *internal conflict deaths* in 2025, the highest number since the inception of the GPI, and a further 18 countries that recorded over one hundred deaths in the last year.

Deteriorations	Improvements	No Change
14	8	1

Of the 23 GPI indicators, eight recorded an improvement and 14 recorded a deterioration, with one registering no change. The largest deterioration was on *deaths from internal conflict*, followed by *neighbouring country relations*, while the biggest improvement was on the *UN peacekeeping funding* indicator.

In the past year, peacefulness deteriorated sharply on the *Ongoing Conflict* domain but improved slightly on average on the *Safety and Security* and *Militarisation* domains. *Militarisation* improved mainly because of stronger commitments to UN peacekeeping operations.

Military expenditure (% of GDP) deteriorated for the third consecutive year. Ninety-seven countries increased their relative military expenditure, compared to just 44 that decreased it. Most of the increase occurred in countries in Western and Central Europe.

Seven of the eight global regions deteriorated in 2025. Only Eastern Europe and Central Asia improved despite the ongoing conflict between Ukraine and Russia.

There are now 103 countries that were at least partially involved in some form of external conflict in the past five years, up from 59 in 2008. In most cases, countries were offering support to an existing government in its conflict with an internal armed rebel or terrorist group.

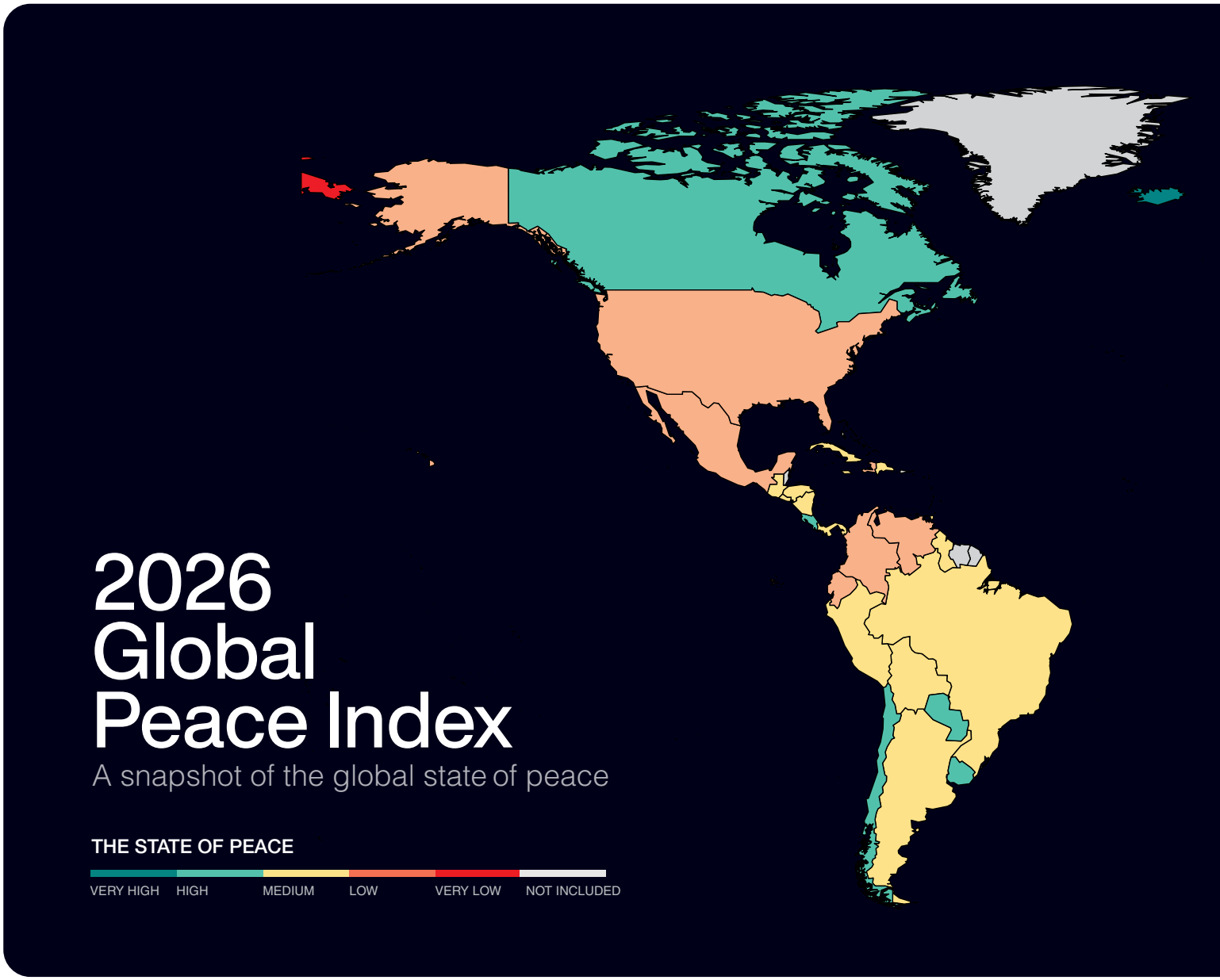
The *deaths from internal conflict* indicator recorded its largest deterioration since the inception of the Index, deteriorating by 6.5 per cent, with deaths increasing in 56 countries. In total, there were just over 181,000 violent conflict deaths in 2025 driven mainly by the conflicts in Ukraine and Sudan.

181,000

4% ↓ Last year, peace in the United States deteriorated by four per cent, mainly due to an increase in political instability, which deteriorated by 38.5 per cent, the largest fall since the inception of the GPI. Violent demonstrations also increased substantially. It is now ranked at 134th on the GPI.

85% Political violence in the United States has reached its highest level since the 1970s, with 85 per cent of Americans reporting that they believe politically motivated violence is increasing.

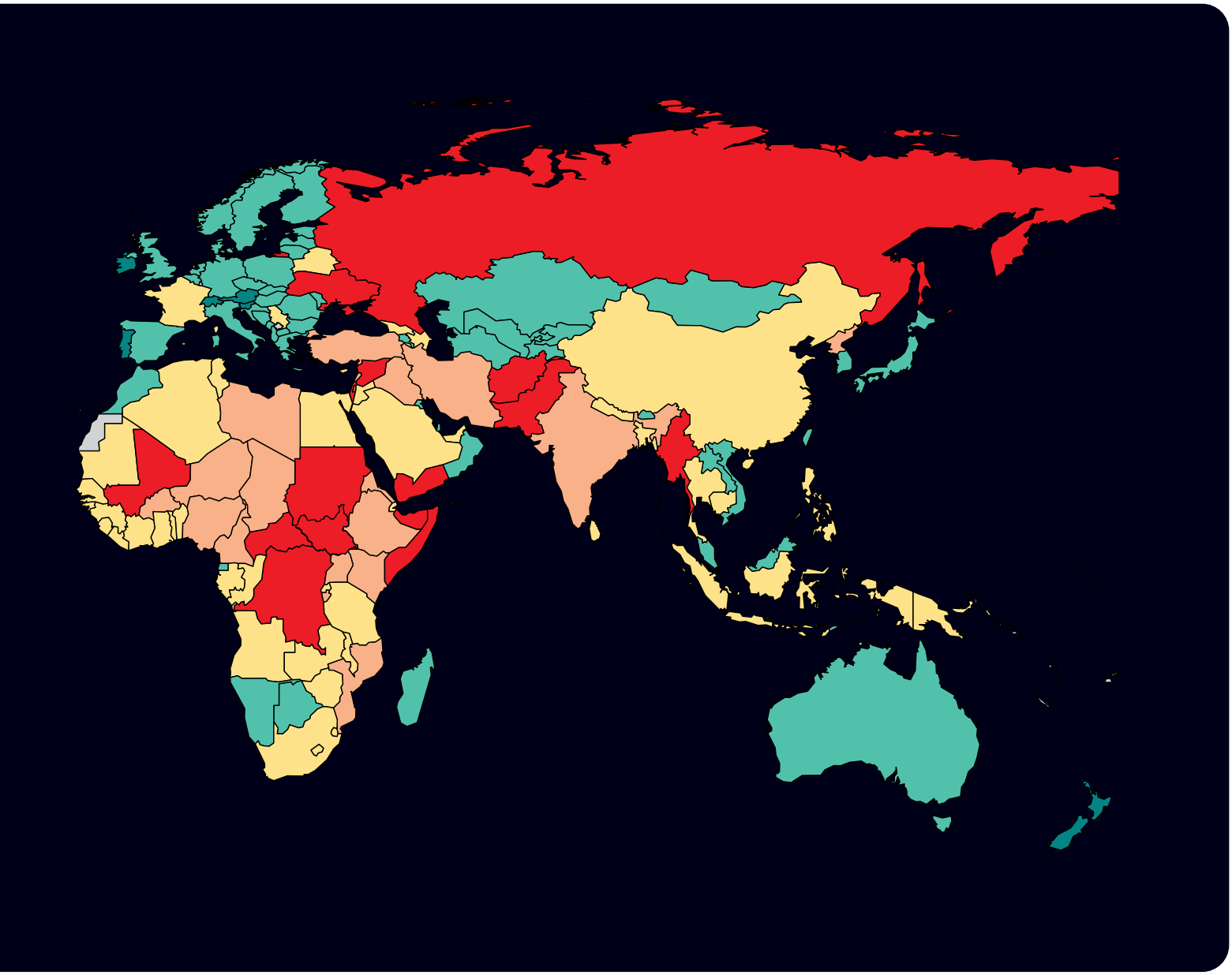
1 Results



RANK		COUNTRY	SCORE	CHANGE
1		Iceland	1.161	↔
2		New Zealand	1.343	↑ 1
3		Switzerland	1.363	↓ 1
4		Slovenia	1.369	↑ 2
5		Ireland	1.371	↓ 1
6		Austria	1.421	↓ 1
7		Portugal	1.427	↑ 1
8		Singapore	1.435	↓ 1
9		Finland	1.478	↑ 1
10		Japan	1.489	↑ 3
11		Denmark	1.504	↓ 2
12		Malaysia	1.513	↓ 1
13		Czechia	1.517	↓ 1
14		Canada	1.525	↑ 1
15		Hungary	1.538	↓ 1
16		Bhutan	1.546	↑ 2
17		Netherlands	1.566	↔
18		Mauritius	1.586	↑ 11
19		Latvia	1.589	↔
20		Australia	1.602	↑ 4
21		Belgium	1.608	↓ 5
22		Poland	1.615	↑ 23
23		Croatia	1.619	↑ 2
24		Lithuania	1.62	↑ 3
25		Estonia	1.623	↓ 5
26		Bulgaria	1.628	↓ 4
27		Spain	1.654	↑ 4
28		Germany	1.657	↓ 5

RANK		COUNTRY	SCORE	CHANGE
29		Slovakia	1.661	↓ 3
30		Montenegro	1.672	↓ 2
31		Qatar	1.676	↓ 10
32		Timor-Leste	1.681	↓ 2
33		Norway	1.688	↔
34		Mongolia	1.692	↑ 4
35		Italy	1.712	↔
36		Albania	1.725	↑ 7
37		Uzbekistan	1.726	↑ 10
38		Equatorial Guinea	1.729	↑ 20
39		United Kingdom	1.73	↓ 7
40		Sweden	1.732	↓ 1
41		Vietnam	1.738	↓ 1
42		Taiwan	1.751	↓ 5
43		Uruguay	1.754	↓ 1
44		Kazakhstan	1.771	↑ 5
45		Romania	1.788	↓ 1
46		North Macedonia	1.792	↑ 3
47		Tajikistan	1.799	↓ 6
48		Bosnia and Herzegovina	1.81	↑ 9
49		Kuwait	1.813	↓ 13
50		Botswana	1.823	↓ 4
51		Armenia	1.825	↑ 21
52		Chile	1.826	↑ 8
53		Greece	1.828	↑ 2
54		Kosovo	1.83	↔
55		Moldova	1.836	↑ 1

RANK		COUNTRY	SCORE	CHANGE
56		The Gambia	1.837	↑ 5
57		South Korea	1.839	↓ 6
58		Laos	1.846	↔
59		Madagascar	1.849	↑ 4
60		Oman	1.85	↓ 26
61		Kyrgyz Republic	1.853	↑ 8
62		Costa Rica	1.86	↓ 14
63		Namibia	1.872	↓ 1
64		Paraguay	1.882	↑ 5
65		Morocco	1.887	↑ 3
66		Turkmenistan	1.903	↓ 2
67		Sri Lanka	1.91	↑ 14
68		Jordan	1.913	↑ 9
69		Indonesia	1.918	↓ 3
=70		Jamaica	1.919	↓ 1
=70		Serbia	1.919	↑ 5
72		Argentina	1.922	↓ 20
73		United Arab Emirates	1.927	↔
74		Sierra Leone	1.937	↑ 9
75		Senegal	1.939	↑ 12
76		Ghana	1.943	↓ 2
77		Tunisia	1.947	↑ 19
78		Angola	1.955	↑ 11
79		Trinidad and Tobago	1.959	↓ 12
80		Cyprus	1.967	↓ 9
81		Panama	1.976	↓ 6
82		Zambia	1.992	↓ 2
83		Malawi	1.994	↓ 18



RANK	COUNTRY	SCORE	CHANGE
84	Papua New Guinea	2.002	↑ 17
85	Guinea-Bissau	2.012	↑ 7
86	Lesotho	2.016	↑ 27
87	Liberia	2.024	↑ 17
88	Guatemala	2.025	↓ 6
89	Dominican Republic	2.038	↓ 10
90	Zimbabwe	2.051	↑ 10
91	Algeria	2.053	↓ 5
92	Bolivia	2.054	↓ 2
93	Côte d'Ivoire	2.061	↓ 9
94	Georgia	2.066	↑ 1
95	Saudi Arabia	2.067	↓ 2
96	Cambodia	2.075	↓ 8
97	Honduras	2.075	↑ 13
98	Tanzania	2.08	↓ 20
99	France	2.083	↑ 3
100	Gabon	2.086	↑ 17
101	Thailand	2.089	↓ 7
102	Philippines	2.092	↓ 3
103	Guyana	2.093	↓ 12
104	Eswatini	2.095	↑ 6
105	Djibouti	2.098	↑ 6
106	Nicaragua	2.107	↓ 9
107	Peru	2.12	↓ 1
108	Bahrain	2.131	↔
109	Cuba	2.139	↓ 11
110	Azerbaijan	2.142	↓ 8
111	Nepal	2.143	↓ 26

RANK	COUNTRY	SCORE	CHANGE
112	Mauritania	2.184	↑ 2
113	Egypt	2.186	↑ 2
114	Rwanda	2.2	↓ 2
115	Belarus	2.216	↑ 1
116	Guinea	2.22	↑ 2
117	Bangladesh	2.226	↑ 3
118	China	2.231	↓ 11
119	Togo	2.251	↑ 7
120	Republic of the Congo	2.256	↓ 15
121	El Salvador	2.264	↑ 1
122	Benin	2.293	↓ 1
123	South Africa	2.308	↓ 4
124	Brazil	2.333	↑ 1
125	Libya	2.361	↑ 3
126	Mozambique	2.383	↑ 1
127	India	2.409	↓ 3
128	Eritrea	2.412	↑ 3
129	Burundi	2.417	↑ 6
130	Uganda	2.42	↓ 7
131	Lebanon	2.435	↑ 3
132	Kenya	2.447	↑ 1
133	Venezuela	2.516	↓ 4
134	United States of America	2.535	↓ 4
135	Ecuador	2.539	↓ 3
136	Türkiye	2.605	↑ 8
137	Cameroon	2.634	↑ 5

RANK	COUNTRY	SCORE	CHANGE
138	Ethiopia	2.648	↑ 1
139	Mexico	2.65	↑ 4
140	Iraq	2.662	↔
141	Colombia	2.735	↓ 4
=142	Haiti	2.755	↓ 1
=142	Nigeria	2.755	↑ 6
144	Iran	2.759	↓ 6
145	Chad	2.769	↓ 9
146	Niger	2.832	↓ 1
147	North Korea	2.845	↔
148	Palestine	2.877	↑ 2
149	Burkina Faso	2.882	↑ 3
150	Central African Republic	2.906	↑ 1
151	Myanmar	2.911	↑ 2
152	Pakistan	2.919	↓ 6
153	Somalia	2.973	↓ 4
154	Mali	2.996	↔
155	Syria	3.067	↔
156	Yemen	3.081	↑ 2
157	Afghanistan	3.106	↔
158	South Sudan	3.116	↓ 2
159	Israel	3.124	↑ 1
160	Ukraine	3.184	↑ 2
161	Democratic Republic of the Congo	3.189	↔
162	Sudan	3.195	↓ 3
163	Russia	3.367	↔

Overview

The 2026 GPI finds that the world became less peaceful for the 15th time in the last 18 years, with the average level of country peacefulness deteriorating by 0.7 per cent over the prior year. This is the 12th consecutive year that global peacefulness has deteriorated. While some indicators, such as *neighbouring countries relations,* are updated to the end of March 2026, the cutoff for most indicators is December 2025, meaning that the full impact of the Iran war is not captured by the Index this year.

The deterioration occurred during a year in which several major violent conflicts, such as those in Sudan, Ukraine, and Myanmar, entered their third or fourth year. Rising tensions in South Asia were reflected in a four-day military exchange between India and Pakistan, the most serious armed clash between these two nuclear-armed states since 1971. Total global military expenditure rose for the 10th consecutive year to its highest recorded level, while the number of forcibly displaced people worldwide remained above 117 million.

There are now 119 countries that are less peaceful than they were in 2008, the year the GPI was first published, and conflict has been the primary driver of the long-run decline. In the past year alone, 99 countries recorded a fall in peacefulness compared with just 62 that improved, with the majority of the 23 GPI indicators deteriorating on average and seven of the eight GPI regions also recording a deterioration.

Conflict was again the principal source of the decline. Total violent conflict deaths reached just over 181,000 in 2025, with 20 countries each recording more than 1,000 deaths from internal conflict, the highest such count since the inception of the Index, and a further 18 countries recording over 100. The *deaths from internal conflict* indicator posted its largest annual deterioration in the GPI's history, worsening by 6.5 per cent, as fatalities rose in 56 countries, with Sudan and Ukraine driving most of the increase.

The internationalisation of these conflicts has also intensified: 103 countries were involved to some degree in external conflict over the past five years, up from just 59 in 2008, reflecting a system in which third-party support for internal wars has become increasingly common.

Global rearmament accelerated alongside the rising death toll. World military expenditure reached US$2.9 trillion in 2025, a 2.9 per cent increase in real terms. The *military expenditure (% of GDP)* indicator deteriorated for the third consecutive year as 97 countries increased their defence spending in relative terms.

Domestic political stresses also intensified within advanced democracies. The United States deteriorated by four per cent, falling to 134th on the GPI, driven by a 38.5 per cent fall on the *political instability* indicator. This is the largest single-year movement on that indicator since the GPI began, with political violence reaching its highest level since the 1970s.

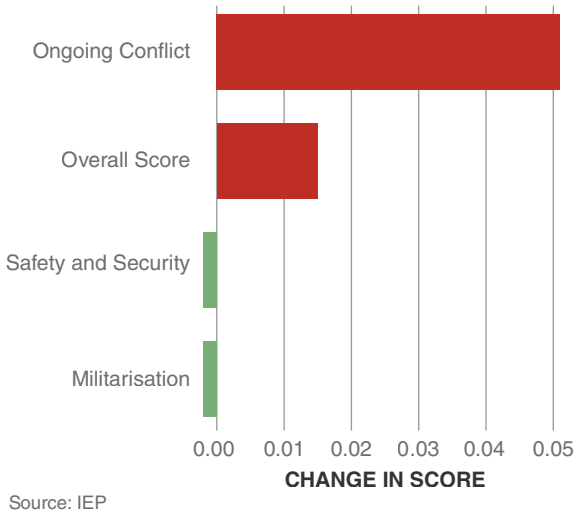
However, there were some improvements. Total deaths from terrorism fell to their lowest level since 2008, the *UN peacekeeping funding* indicator recorded the largest improvement of any indicator on the index, and Eastern Europe and Central Asia recorded an average improvement in peacefulness over the year, after many years of deteriorating peacefulness.

Figure 1.1 shows the change in the average levels of peacefulness for each of the GPI domains, as well as the percentage of countries that improved or deteriorated.

FIGURE 1.1

Year-on-year change in GPI score by domain, 2026

There was a large deterioration on the *Ongoing Conflict* domain.



Source: IEP

The *Ongoing Conflict* domain recorded the largest deterioration, with the average score on the domain deteriorating by 2.7 per cent. Of the 163 GPI countries, 80 recorded a deterioration on this domain, compared with 55 that improved. Every indicator within the domain except *external conflicts fought* and *deaths from external conflict* deteriorated, with the largest deteriorations occurring on the *deaths from internal conflict* and *neighbouring countries relations* indicators.

The largest percentage deteriorations on the domain occurred in Cambodia, Kuwait, and Oman. Cambodia's score moved sharply after the renewed border crisis with Thailand that started in mid-2025 and left more than 100 people dead.[1] Kuwait and Oman deteriorated on this domain owing to the ongoing impact on the region of the Twelve-Day War between Israel and Iran in June 2025, during which Iranian missile and drone barrages and reciprocal Israeli and US strikes repeatedly closed Gulf airspace and shipping lanes.[2]

The wider Middle East deterioration also reflected the continuation of Israel's military campaign in Gaza into its third year, the brief but intense Israel–Hezbollah confrontation that culminated in the November 2024 ceasefire, and persistent Houthi attacks on Red Sea shipping that have disrupted global trade routes since late 2023. These overlapping conflicts are the most extensive period of regional instability since at least the

2003 Iraq War.[3] The internal and external conflict fought indicators are calculated over a five-year period but are more heavily weighted towards later years.

The largest improvements on the domain occurred in Poland, Uzbekistan, and Lesotho, with a noticeable improvement also recorded in Syria. The December 2024 collapse of the ruling regime in Syria opened a path toward political transition after more than 13 years of civil war, with the militant group Hay'et Tahrir al-Sham capturing Damascus and over a million refugees beginning to return by late 2025.[4]

Despite a slight overall improvement on the *Militarisation* domain, with the average score improving by 0.1 per cent globally, the indicator-level picture reveals a continued increase in military capability and spending. The biggest deteriorations on the domain occurred in Denmark, Sierra Leone, and Nicaragua, while the largest improvements occurred in Gabon, Papua New Guinea, and Angola.

Six of the seven indicators in the domain deteriorated on average, and 96 of the 163 GPI countries recorded an increase in *military expenditure (% of GDP)*. Progress on the domain was driven almost entirely by *UN peacekeeping funding*, with 101 countries recording an improvement. However, this masks changes in the UN budget settings; country contributions were lower due to lower UN peacekeeping budgets because of reduced peacekeeping operations. This made it easier for countries to meet their dues.

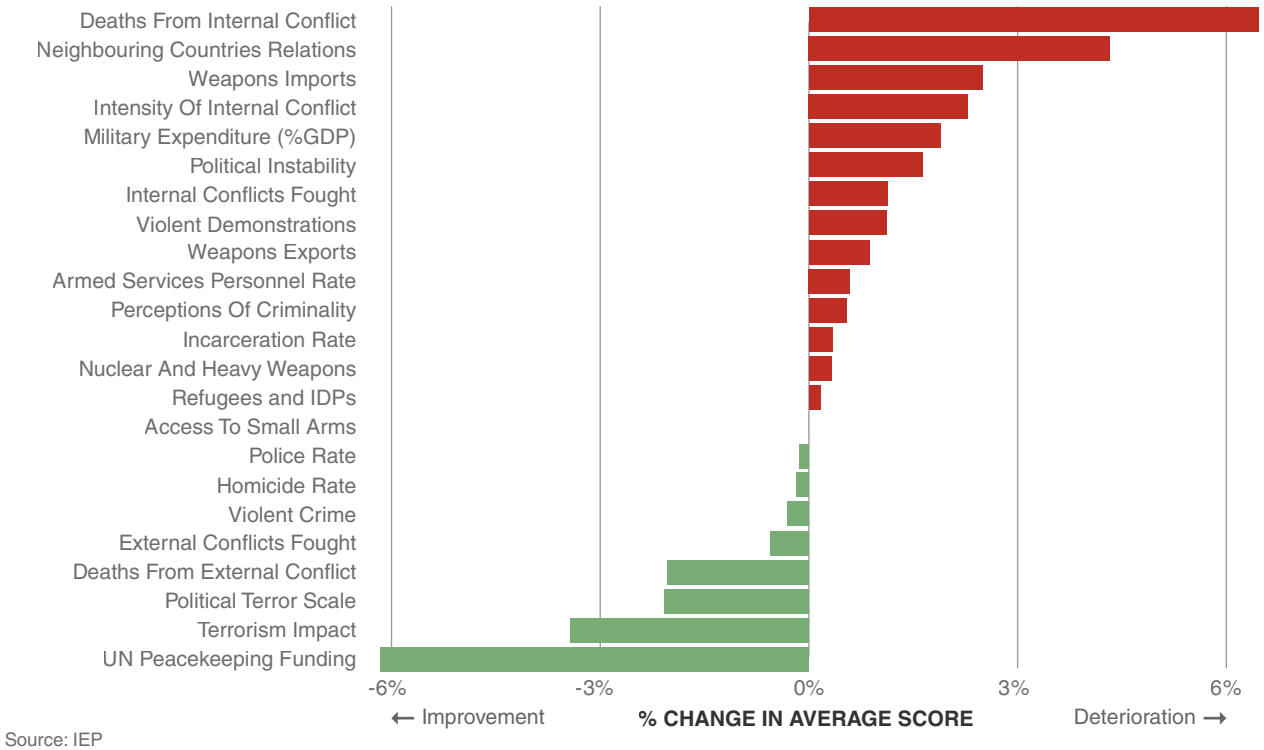
The *Safety and Security* domain also recorded an improvement of 0.1 per cent. However, the overall change masks considerable variation between countries. Seventy-seven countries recorded a deterioration on the domain, while 85 improved. *Terrorism impact* had the largest improvement on the domain, driven by a 28 per cent decrease in deaths from terrorism, followed by the *Political Terror Scale* and *violent crime* indicators. By contrast, *intensity of internal conflict, political instability,* and *violent demonstrations* all deteriorated. The biggest country-level deteriorations on the *Safety and Security* domain occurred in China, the Republic of the Congo, and Somalia, while the largest improvements occurred in Poland, Armenia, and Equatorial Guinea. China's deterioration was driven by changes on the *violent crime* indicator.

Figure 1.2 shows the average percentage change for each indicator from the 2025 GPI to the 2026 GPI. Fourteen of the 23 GPI indicators deteriorated on average, with eight improving and one remaining unchanged. The largest average deterioration was on the *deaths from internal conflict* indicator, while the *UN peacekeeping funding* indicator had the largest improvement.

FIGURE 1.2

Percentage change in score by indicator, 2025–2026

Fourteen of the 23 GPI indicators recorded a deterioration over the past year.



Source: IEP

The *deaths from internal conflict* indicator recorded its largest deterioration since the inception of the Index, with the average score worsening by 6.5 per cent, with 56 countries deteriorating. In total there were just over 181,000 violent conflict deaths in 2025, reflecting the compounding effect of long-running conflicts in Sudan, Ukraine, and the Sahel. The civil war in Sudan was a major driver: the UN documented at least 3,300 civilian deaths in the first half of 2025 alone, more than two and a half times the figure in the first half of 2024.[5] After the fall of the city of El Fasher to the Rapid Support Forces in October 2025, UN investigators documented large-scale killings of civilians, and independent estimates of the cumulative war dead have reached as high as 150,000.[6]

The same fragmentation of state authority is visible in Myanmar. More than 2,600 non-state armed actors are operating inside the country, representing approximately 21 per cent of all such groups worldwide. Over 3.6 million people remain displaced internally, with a further 1.5 million displaced abroad.[7] The conflict has resulted in over 90,000 deaths. As of early 2026, the military had reportedly made substantial gains against rebel groups, and in a sign of growing confidence, it reduced the prison sentence of former head of government Aung San Suu Kyi, moving her to house arrest.[8]

The largest country-level improvements on the *deaths from internal conflict* indicator occurred in Lebanon, Türkiye, and Togo, with Lebanon's score improving by close to 40 per cent following the November 2024 ceasefire between Israel and Hezbollah.[9] However, this improvement may be short lived, with over 2,000 fatalities recorded since the conflict reignited in March 2026.

Average *military expenditure (% of GDP)* deteriorated for the third consecutive year and is now at its highest level since the inception of the Index. There were 96 countries where relative military spending increased, compared with only 44 where it decreased. Global military expenditure reached US$2.9 trillion in 2025, with expenditure outside of the US rising by over nine per cent. Total military expenditure is now equivalent to 2.5 per cent of global GDP and military spending per person reached its highest level since 1990.[10]

Much of the increase in military expenditure occurred in Western and Central Europe, which alone accounted for over a third of the global deterioration. The five largest country-level movers, Denmark, Norway, Lithuania, Belgium, and Sweden, are all NATO members responding to the ongoing war in Ukraine. Russia's own spending rose to an estimated US$190 billion, a 38 per cent real-terms increase equivalent to 7.1 per cent of GDP and almost a fifth of all federal government spending, while Ukraine's spending reached 40 per cent of GDP, the highest military burden of any country in the Index. European allies collectively raised defence spending by approximately 20 per cent in 2025, and at the 2025 NATO summit in The Hague members committed to reaching five per cent of GDP on defence and security by 2035.[11]

A similar pattern is visible on the *weapons imports* indicator, which deteriorated by an average of 2.5 per cent. Western and Central Europe accounted for 52.1 per cent of the global change on this indicator, and Eastern Europe and Central Asia accounted for 19.2 per cent. The biggest country-level deteriorations occurred in Bulgaria, Slovakia, Estonia, Azerbaijan, and Poland, as frontline NATO states rebuilt depleted arsenals and acquired new military capabilities in response to the ongoing conflict in Ukraine.

The *UN peacekeeping funding* indicator recorded the largest improvement of any of the 23 GPI indicators this year, improving by 6.2 per cent. Of the 163 GPI countries, 101 recorded an improvement on the indicator, compared with 39 that deteriorated. Since the inception of the Index, the *UN peacekeeping funding* indicator has recorded the largest cumulative improvement of any of the GPI indicators.

Although conflict intensified globally, the *terrorism impact* indicator improved by 3.4 per cent, with total deaths from terrorism at their lowest level since 2008. Of the 163 GPI countries, 81 recorded an improvement compared with 19 that deteriorated. However, terrorism has become more geographically concentrated: the Sahel continued to record some of the world's highest terrorism death tolls, with the UN recording more than 9,000 deaths from security incidents across Burkina Faso, Mali, and Niger in 2025.[12] The largest country-level deteriorations on the indicator occurred in Ecuador, Australia, and Austria.

The *external conflicts fought* indicator recorded a marginal improvement of 0.5 per cent, but the longer-run picture continues to reflect an international system in which external involvement in others' conflicts has become the norm. There are now 103 countries that were at least partially involved in some form of external conflict in the past five years, up from 59 in 2008. In most cases, countries were offering support to an existing government in its conflict with an internal armed rebel or terrorist group.

Niger, the United States, Iran, Tanzania, Cameroon, and Rwanda were among the countries most heavily involved in external conflict. The most striking new flashpoint of 2025, however, was the four-day military exchange between India and Pakistan in May, the most serious armed clash between the two nuclear-armed states since 1971. Pakistan made the first known combat use of several Chinese-made weapons, including the J-10C fighter jet and the PL-15 missile. The confrontation prompted India to suspend the Indus Waters Treaty and halt all bilateral trade with Pakistan.[13]

Regional Overview

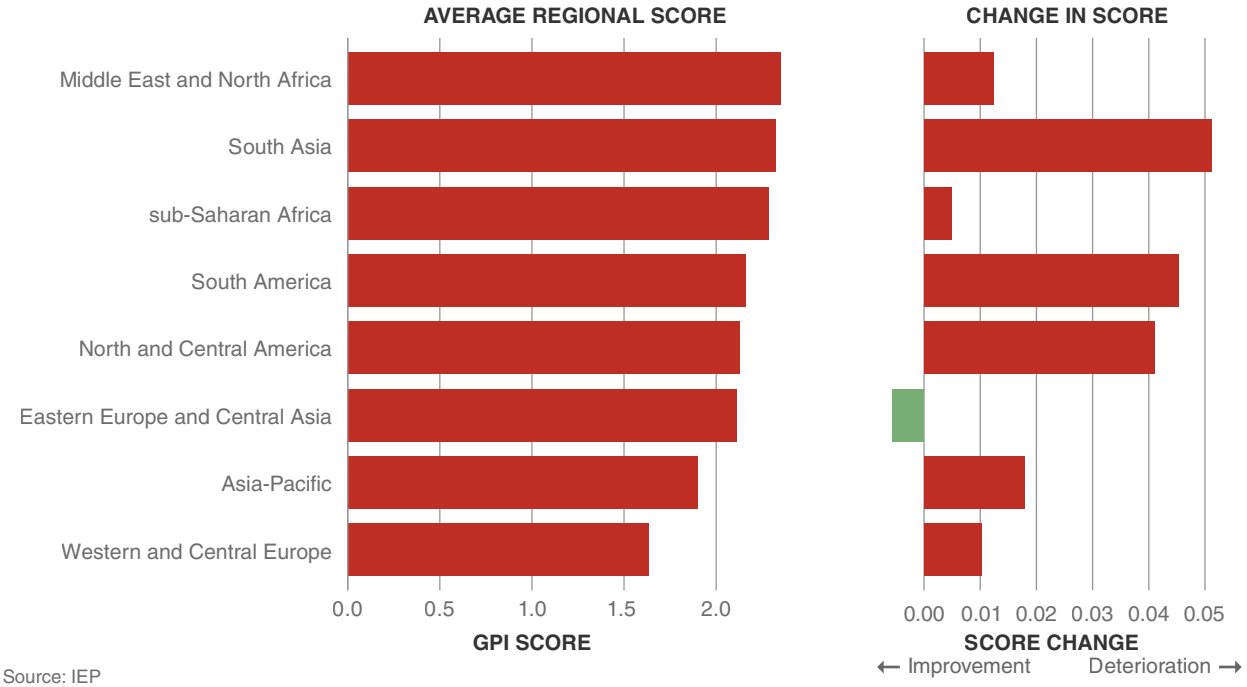
Seven of the eight GPI regions deteriorated in peacefulness in 2025. Eastern Europe and Central Asia was the only region to improve on average over the past year.

South Asia recorded the largest average deterioration of all the regions, with significant falls in peacefulness in Nepal, Pakistan, and India. Figure 1.3 shows the overall score for each region on the 2026 GPI, as well as the change in score since the 2025 GPI.

FIGURE 1.3

Regional GPI 2026 scores and score changes from the 2025 GPI

Seven of the eight GPI regions deteriorated in peacefulness in the past year.



Source: IEP

ASIA-PACIFIC

TABLE 1.1

Asia-Pacific

Regional Rank	Country	Overall Score	Score Change	Overall Rank
1	New Zealand	1.343	-0.005	2
2	Singapore	1.435	0.001	8
3	Japan	1.489	-0.022	10
4	Malaysia	1.513	0.009	12
5	Australia	1.602	-0.002	20
6	Timor-Leste	1.681	0.030	32
7	Mongolia	1.692	-0.030	34
8	Vietnam	1.738	0.000	41
9	Taiwan	1.751	0.030	42
10	South Korea	1.839	0.036	57
11	Laos	1.846	0.012	58
12	Indonesia	1.918	0.046	69
13	Papua New Guinea	2.002	-0.069	84
14	Cambodia	2.075	0.101	96
15	Thailand	2.089	0.049	101
16	Philippines	2.092	0.029	102
17	China	2.231	0.118	118
18	North Korea	2.845	0.014	147
19	Myanmar	2.911	-0.008	151
	REGIONAL AVERAGE	**1.900**	**0.018**	

The Asia-Pacific region recorded a deterioration in peacefulness on the 2026 GPI, with the average overall score deteriorating by 0.9 per cent. Despite this decline, the region remains the second most peaceful in the world, behind Western and Central Europe, a position it has held for several years. Twelve of the 19 countries in the region deteriorated in peacefulness over the past year, with six countries improving and one recording no change. The deterioration was primarily driven by a two per cent increase in the *Ongoing Conflict* domain, with a smaller deterioration on the *Safety and Security* domain.

New Zealand remains the most peaceful country in the Asia-Pacific region and the second most peaceful country in the world. New Zealand recorded a slight improvement in peacefulness over the past year, with its overall score improving by 0.4 per cent. The improvement was driven by the *Militarisation* domain, which improved by 3.3 per cent, owing to a decrease in *weapons imports*. New Zealand continues to rank among the top countries globally on the *Ongoing Conflict* and *Safety and Security* domains and has the lowest *Ongoing Conflict* score of any country in the Asia-Pacific region.

Myanmar remains the least peaceful country in the Asia-Pacific region and is ranked 151st globally on the 2026 GPI, reflecting the continued devastation of the civil war that has engulfed the country since the military coup in February 2021. Despite a marginal improvement of 0.3 per cent in its overall score, Myanmar's conflict situation remains severe, with more than 3.5 million people internally displaced and an estimated 90,000 killed since the onset of hostilities.[14] The *Safety and Security* domain recorded a small improvement of 1.5 per cent. However, the *Ongoing Conflict* and *Militarisation* domains both deteriorated. Myanmar's *intensity of internal conflict* and *Political Terror Scale* indicators remain at the highest possible levels. In late 2025, the military junta conducted elections amid ongoing fighting.[15]

Papua New Guinea recorded the largest improvement in peacefulness in the Asia-Pacific region on the 2026 GPI, with its overall score improving by 3.3 per cent. Ranked 84th globally and 13th in the region, Papua New Guinea improved across all three GPI domains, with the *Militarisation* domain recording the largest improvement, at 11.4 per cent, driven by a substantial improvement in *UN peacekeeping funding*. The *Safety and Security* domain improved by 1.1 per cent, while the *Ongoing Conflict* domain recorded a marginal improvement of 0.3 per cent. Over the past year, Papua New Guinea continued to advance national security frameworks, including the adoption of a National Prevention Strategy for 2025–2030,[16] and progress on small arms control initiatives in partnership with the United Nations.[17] The government also approved a landmark mutual defence treaty with Australia, signalling a deepening of regional security cooperation.[18]

China recorded the largest deterioration in peacefulness in the Asia-Pacific region on the 2026 GPI, with its overall score deteriorating by 5.6 per cent. Ranked 118th globally, China's decline was driven primarily by the *Safety and Security* domain, which deteriorated by 12.5 per cent. The *perceptions of criminality* indicator recorded the most significant deterioration, with the percentage of people who say they do not feel safe walking alone jumping from six to 26 per cent. There was a similar deterioration on the *violent crime* indicator, with the percentage of people who stated they had been a victim of violent crime rising from six to 23 per cent. The *Militarisation* domain recorded a minor improvement of 0.3 per cent, while the *Ongoing Conflict* domain remained largely unchanged. China's military posture in the region continued to intensify over the past year, with the People's Liberation Army conducting 163 separate activities in the South China Sea in 2025, including live-firing exercises, drills, and operations.[19] In December 2025, China deployed more than one hundred naval and coast guard vessels across East Asian waters in its largest show of force to date, while also conducting its most extensive military drills around Taiwan.[20]

Cambodia recorded the second largest deterioration in the region, with its overall score deteriorating by 5.1 per cent on the 2026 GPI, falling to 96th globally. The deterioration was driven primarily by the *Ongoing Conflict* domain, which increased by 28.8 per cent, with the *deaths from internal conflict* indicator recording a 92 per cent increase. Cambodia's political environment continued to tighten over the past year, with sustained government repression of opposition parties, civil society, and independent media. The Candlelight Party was prohibited from competing in the February 2025 Senate elections.[21] However, the *Safety and Security* domain improved by 4.6 per cent, driven by improvements in *violent crime*, *violent demonstrations,* and *perceptions of criminality*. The *Militarisation* domain also improved slightly, by 3.4 per cent.

Japan improved by 1.5 per cent on the 2026 GPI, rising to 10th globally and third in the region. The improvement was driven by a 6.3 per cent improvement on the *Ongoing Conflict* domain, with the *intensity of internal conflict* indicator recording a 25 per cent improvement. However, the *Militarisation* domain deteriorated by 3.6 per cent, reflecting Japan's ongoing defence expansion. In 2025, Japan approved a record defence budget of US$55 billion and launched its Joint Operations Command to centralise control of all Self-Defense Forces branches, continuing a multi-year shift in the country's security posture.[22]

Indonesia and Thailand also recorded notable deteriorations in peacefulness on the 2026 GPI. Indonesia's overall score deteriorated by 2.5 per cent, falling to 69th globally, driven by a five per cent deterioration on the *Safety and Security* domain and increases in the *political instability* and *Political Terror Scale* indicators. Thailand deteriorated by 2.4 per cent to rank 101st globally, with the *Ongoing Conflict* domain recording a 12.5 per cent increase, driven by a deterioration on the *terrorism impact* indicator and a rise in *deaths from internal conflict*. However, Thailand's *Militarisation* domain improved by 4.9 per cent, partially offsetting these deteriorations.

EASTERN EUROPE AND CENTRAL ASIA

TABLE 1.2

Eastern Europe and Central Asia

Regional Rank	Country	Overall Score	Score Change	Overall Rank
1	Bulgaria	1.628	0.039	26
2	Uzbekistan	1.726	-0.055	37
3	Kazakhstan	1.771	-0.020	44
4	Romania	1.788	0.027	45
5	Tajikistan	1.799	0.050	47
6	Armenia	1.825	-0.076	51
7	Moldova	1.836	0.090	55
8	Kyrgyz Republic	1.853	0.041	61
9	Turkmenistan	1.903	0.044	66
10	Georgia	2.066	0.020	94
11	Azerbaijan	2.142	0.069	110
12	Belarus	2.216	0.020	115
13	Türkiye	2.605	-0.110	136
14	Ukraine	3.184	-0.119	160
15	Russia	3.367	-0.023	163
	REGIONAL AVERAGE	**2.114**	**-0.006**	

Eastern Europe and Central Asia recorded a very minimal improvement in peacefulness on the 2026 GPI, with the regional average score remaining at 2.114. The region is ranked third of the eight GPI regions. Six of the 15 countries in the region improved in peacefulness, while nine deteriorated. The *Militarisation* domain recorded the largest change at the regional level, deteriorating by two per cent, driven in large part by increased defence expenditure across NATO member states and rising arms imports in several Central Asian countries.[23] The *Ongoing Conflict* and *Safety and Security* domains were largely stable at the regional level, though individual country movements were significant. The region continues to be defined by stark contrasts: Bulgaria, ranked 26th globally, and Russia, ranked 163rd, represent the most and least peaceful countries regionally, respectively.

Although Bulgaria is the most peaceful country in Eastern Europe and Central Asia, it recorded a deterioration of 2.5 per cent over the past year, driven primarily by the *Militarisation* domain, which deteriorated by eight per cent. The *weapons imports* reached their highest level since the beginning of the Index, while the *armed services personnel rate* rose from just under 550 to over 640 personnel per 100,000 people. Bulgaria's defence spending nearly doubled over the past decade as the country moved to meet NATO's two per cent of GDP target, which it did in 2025.[24] The *Safety and Security* domain deteriorated marginally by 1.3 per cent, while the *Ongoing Conflict* domain remained unchanged.

Russia remains the least peaceful country both regionally and globally. Russia recorded an improvement of 0.7 per cent in the past year, with the *Ongoing Conflict* domain improving by 3.9 per cent, driven by a decrease in *deaths from internal conflict*. However, the *Militarisation* domain deteriorated by 5.8 per cent, with both *UN peacekeeping funding* and *military expenditure* recording significant deteriorations. Russia's total planned military expenditure in 2025 was estimated at 15.5 trillion roubles or just over US$190 billion, equivalent to 7.2 per cent of GDP, while official claims put 2025 arms exports at US$15 billion.[25]

Armenia recorded the joint largest percentage improvement in the region on the 2026 GPI, with its overall score improving by four per cent. Ranked 51st globally and sixth in the region, Armenia's improvement was driven by the *Safety and Security* domain, which improved by 9.3 per cent. The *violent demonstrations* indicator recorded a 42.9 per cent improvement, while the *Political Terror Scale* indicator improved by 33.3 per cent. The *Ongoing Conflict* domain also improved marginally by 1.8 per cent. Armenia's improvement reflects the broader normalisation process with Azerbaijan, against the backdrop of the countries' decades-old Nagorno-Karabakh conflict. This normalisation process advanced significantly through 2025 and into 2026. The two countries signed a peace agreement in August 2025 in the United States, and subsequent steps included border demarcation, fuel shipments, and the planned construction of a transport corridor linking Azerbaijan with its Nakhchivan exclave.[26]

Despite this progress related to the Nagorno-Karabakh conflict, Azerbaijan recorded the largest deterioration in the region on the 2026 GPI, with its overall score deteriorating by 3.3 per cent. Ranked 110th globally and 11th in the region, Azerbaijan's deterioration was driven primarily by the *Ongoing Conflict* domain, which increased by 12.2 per cent. The *weapons imports* indicator deteriorated by 46.5 per cent, and the *neighbouring countries relations* indicator recorded a 33.3 per cent deterioration. Although relations have improved with Armenia, tensions with Iran increased throughout 2025 and into early 2026. Despite the diplomatic progress made with Armenia, Azerbaijan continued to increase military expenditure, with its 2026 defence budget rising by almost four per cent to approximately US$5.1 billion.[27]

Türkiye recorded the joint-largest improvement in the region on the 2026 GPI, with its overall score improving by 4.1 per cent. Ranked 136th globally and 13th in the region, Türkiye's improvement was driven by a 7.4 per cent improvement in the *Ongoing Conflict* domain. The *deaths from internal conflict* indicator improved by 28.6 per cent, while the *terrorism impact* indicator improved by 11.7 per cent and the *violent demonstrations* indicator improved by 18.2 per cent. The *Safety and Security* domain also improved by 3.4 per cent, driven by a 7.5 per cent improvement in the *perceptions of criminality* indicator. However, the *Militarisation* domain deteriorated by 1.1 per cent. Türkiye's overall improvement reflects a landmark shift in the Kurdish–Turkish conflict. In February 2025, imprisoned leader of the militant Kurdistan Workers' Party (PKK), Abdullah Öcalan, called for the organisation's dissolution, and in March the PKK announced a unilateral ceasefire and subsequently pledged to end all armed operations.[28] A disarmament ceremony was held in July 2025 in Iraqi Kurdistan.

Ukraine recorded a significant improvement of 3.6 per cent on the 2026 GPI, the largest improvement in score in the region. However, amid the ongoing Russia-Ukraine war, the country still ranked 160th globally and 14th in the region. The improvement was driven by both the *Ongoing Conflict* domain, which improved by 3.8 per cent, and the *Safety and Security* domain, which improved by 4.9 per cent. The *Political Terror Scale* and *deaths from external conflict* indicators had the largest overall improvements. However, the *Militarisation* domain was largely unchanged, with the *nuclear and heavy weapons* indicator deteriorating by seven per cent. Peace negotiations remained stalled through much of 2025, though diplomatic activity intensified in early 2026, with the United States backing security guarantees and France and the United Kingdom pledging to deploy forces to Ukraine in the event of a ceasefire agreement.[29] The fundamental question of territorial control in eastern Ukraine remains unresolved.

Georgia recorded a marginal deterioration of one per cent on the 2026 GPI, falling to 94th globally and 10th in the region. The deterioration was driven by the *Safety and Security* domain, which increased by 2.2 per cent, with the *perceptions of criminality* indicator deteriorating by 11.8 per cent and the *political instability* indicator recording a 16.7 per cent increase. The *Militarisation* domain improved marginally by 0.6 per cent, while the *Ongoing Conflict* domain remained unchanged. Georgia's political environment deteriorated significantly following the disputed October 2024 parliamentary elections, which international observers described as fundamentally flawed.[30] The ruling party's decision to suspend EU accession preparations until 2028 triggered mass protests throughout 2025, including a human chain spanning several kilometres in the capital city of Tbilisi in December.

MIDDLE EAST AND NORTH AFRICA

TABLE 1.3

Middle East and North Africa

Regional Rank	Country	Overall Score	Score Change	Overall Rank
1	Qatar	1.676	0.097	31
2	Kuwait	1.813	0.096	49
3	Oman	1.850	0.141	60
4	Morocco	1.887	-0.001	65
5	Jordan	1.913	-0.019	68
6	United Arab Emirates	1.927	0.023	73
7	Tunisia	1.947	-0.102	77
8	Algeria	2.053	0.084	91
9	Saudi Arabia	2.067	0.031	95
10	Bahrain	2.131	0.017	108
11	Egypt	2.186	0.000	113
12	Libya	2.361	-0.046	125
13	Lebanon	2.435	-0.081	131
14	Iraq	2.662	-0.007	140
15	Iran	2.759	0.106	144
16	Palestine	2.877	0.022	148
17	Syria	3.067	0.021	155
18	Yemen	3.081	-0.067	156
19	Israel	3.124	-0.085	159
20	Sudan	3.195	0.018	162
	REGIONAL AVERAGE	**2.351**	**0.012**	

The Middle East and North Africa remains the least peaceful region in the world on the 2026 GPI. The average country score in the region deteriorated by 0.5 per cent over the past year, though the impact of the Iran war that started in February 2026 is mostly uncaptured in this report as it started after the end of the reporting period. Eleven of the 20 countries in the region deteriorated, eight improved, and one was unchanged. The *Ongoing Conflict* domain recorded the largest change at the regional level, deteriorating by 7.5 per cent, driven in large part by a sharp increase in the *neighbouring countries relations* indicator across several Gulf states as the conflict in Iran intensified and regional tensions escalated. The *Safety and Security* and *Militarisation* domains were more stable at the regional level. The region continues to be characterised by extreme disparities in peacefulness, from Qatar ranked 31st globally to Sudan ranked 162nd, the second least peaceful country globally.

Qatar remains the most peaceful country in the Middle East and North Africa and is ranked 31st globally on the 2026 GPI. However, Qatar recorded a significant deterioration of 6.1 per cent over the past year, the largest deterioration among the Gulf states. The decline was driven overwhelmingly by the *Ongoing Conflict* domain, which deteriorated by 19.3 per cent. The *neighbouring countries relations* indicator had the largest

deterioration, followed by *deaths from internal conflict* and *internal conflicts fought*. Qatar's deterioration reflects the broader regional instability arising from the conflicts in Yemen and Iran and the resulting strain on Gulf Cooperation Council relationships.[31]

Sudan remains the least peaceful country in the Middle East and North Africa and is ranked 162nd globally on the 2026 GPI. Sudan recorded a marginal deterioration of 0.6 per cent, though this reflects the fact that many indicators were already at or near their worst possible scores. The *Safety and Security* domain deteriorated by 1.1 per cent, the *Ongoing Conflict* domain by 0.5 per cent, and the *Militarisation* domain by 0.2 per cent. The *deaths from internal conflict* indicator deteriorated by 13.1 per cent. Sudan's civil war between the Sudanese Armed Forces and the Rapid Support Forces continued through 2025, with the conflict killing an estimated 150,000 people and displacing nearly 13 million since it began in April 2023.[32] Famine was confirmed in several regions, and more than 25 million people faced severe food insecurity.

Tunisia recorded the largest improvement in the region on the 2026 GPI, with its overall score improving by five per cent. Every single indicator in Tunisia either recorded an improvement or no change over the past year. Tunisia's improvement was driven by the *Safety and Security* domain, which improved by 8.1 per cent. Both *perceptions of criminality* and *violent crime* improved, with the number of people who say they do not feel safe walking alone falling from 35 per cent to 23 per cent, and the number of people saying that they had been the victim of a violent crime dropping from 14 to seven per cent. The improvement in safety indicators reflects a broader consolidation of state authority, although this has come at a cost to civil liberties, with more than 50 people reportedly held on political grounds as of January 2025.[33]

Oman recorded the largest deterioration in the region on the 2026 GPI, with its overall score deteriorating by 8.3 per cent. Ranked 60th globally and third in the region, Oman's decline was driven almost entirely by the *Ongoing Conflict* domain, which deteriorated by 28.7 per cent. The *neighbouring countries relations* indicator recorded the largest deterioration, driven entirely by the conflict with Iran, while the *political instability* indicator deteriorated by 9.1 per cent, also as a result of increasing tensions with Iran. The ongoing conflict in Yemen has also played a role in Oman's deteriorating score. In late 2025, forces of the Southern Transitional Council seized control of a border crossing between Yemen and Oman in the Mahra province, deepening threat perceptions in Oman.[34] The instability threatened Oman's traditionally neutral diplomatic posture in the region.

Israel recorded an improvement of 2.6 per cent on the 2026 GPI, although it is still ranked amongst the five least peaceful countries globally. However, this does not take into account the Iran war that started in late February 2026. The improvement was driven by the *Safety and Security* domain, which improved by six per cent, with the *violent demonstrations* indicator improving by 36.4 per cent and the *political instability* indicator improving by 10 per cent. The *Ongoing Conflict* domain also improved by two per cent, with the *external conflicts fought* indicator improving by 14.3 per cent and the *deaths from external conflict* indicator improving by 9.1 per cent. The improvements followed the ceasefire agreement between Israel and Hamas in January 2025, though the truce was broken in March 2025 when Israel conducted extensive airstrikes on Gaza.[35] A second ceasefire was reached in October 2025 under a US-brokered peace plan, though it remained fragile, with over 2,000 violations documented through March 2026.

Lebanon recorded an improvement of 3.2 per cent on the 2026 GPI, rising to 131st globally and 13th in the region. The improvement was driven by the *Ongoing Conflict* domain, which improved by 5.6 per cent, with the *deaths from internal conflict* indicator recording a 39.2 per cent improvement and the *Militarisation* domain also improved significantly by 7.1 per cent, driven by a 40.1 per cent improvement in the *UN peacekeeping funding* indicator. However, the *Safety and Security* domain deteriorated by 0.5 per cent, with the *violent crime* indicator increasing by 25 per cent. The improvement reflects the November 2024 ceasefire agreement between Israel and Hezbollah, which brought a reduction in active hostilities.[36] However, the recovery has been uneven; more than 64,000 people remained internally displaced as of late 2025, and nearly a fifth of homes near the southern border were destroyed. The conflict reignited in early 2026, with over 2,000 fatalities recorded in the first quarter of the year, which will be reflected in next year's GPI.

Iran recorded a deterioration of four per cent on the 2026 GPI, falling to 144th globally and 15th in the region. The deterioration was driven by the *Safety and Security* domain, which increased by 6.9 per cent, with the *violent demonstrations* indicator recording a 66.7 per cent increase and the *intensity of internal conflict* indicator deteriorating by 16.7 per cent. Iran experienced widespread protests beginning in December 2025, triggered by economic freefall and a sharp devaluation of the rial following the June 2025 conflict with Israel.[37] The security forces' response was described as the deadliest crackdown since the Islamic Republic's founding in 1979. The *Ongoing Conflict* domain also deteriorated by 7.8 per cent, with the *deaths from internal conflict* indicator increasing by 39.8 per cent and the *internal conflicts fought* indicator deteriorating by 12.1 per cent.

NORTH AND CENTRAL AMERICA

TABLE 1.4

North and Central America

Regional Rank	Country	Overall Score	Score Change	Overall Rank
1	Canada	1.525	-0.002	14
2	Costa Rica	1.860	0.070	62
3	Jamaica	1.919	0.030	70
4	Trinidad and Tobago	1.959	0.073	79
5	Panama	1.976	0.054	81
6	Guatemala	2.025	0.067	88
7	Dominican Republic	2.038	0.091	89
8	Honduras	2.075	-0.043	96
9	Nicaragua	2.107	0.048	106
10	Cuba	2.139	0.077	109
11	El Salvador	2.264	-0.013	121
12	United States of America	2.535	0.097	134
13	Mexico	2.650	-0.055	139
14	Haiti	2.755	0.080	142
	REGIONAL AVERAGE	**2.131**	**0.041**	

North and Central America recorded a significant deterioration in peacefulness on the 2026 GPI, with the average overall score deteriorating by two per cent. Ten of the 14 countries in the region deteriorated in peacefulness over the past year, with only four countries recording improvements. The deterioration was driven primarily by the *Ongoing Conflict* domain, which recorded the largest change at 5.5 per cent, while the *Safety and Security* domain also deteriorated. The *Militarisation* domain was the only domain to improve at the regional level. There is a considerable disparity in peacefulness across the region, with Canada ranked 14th globally and Haiti ranked 142nd.

Canada remains the most peaceful country in the region, with an overall score of 1.525. Canada recorded a marginal improvement of 0.1 per cent over the past year, driven by the *Safety and Security* domain, which improved by 1.8 per cent. However, both the *Ongoing Conflict* and *Militarisation* domains deteriorated slightly, by 0.7 per cent and 1.6 per cent, respectively. The improvement on the *Safety and Security* domain was driven by gains on the *perceptions of criminality* and *Political Terror Scale* indicators, while the *violent demonstrations* indicator deteriorated by 14.3 per cent. Despite the overall improvement, Canada's *Safety and Security* domain score has deteriorated over the longer term since 2008, deteriorating by 7.7 per cent.

Haiti remains the least peaceful country in the region and is ranked 142nd globally on the 2026 GPI, with its overall score deteriorating by three per cent over the past year. Haiti deteriorated across all three GPI domains, with the *Ongoing Conflict* domain recording the largest deterioration at 5.5 per cent, followed by the *Militarisation* domain at 2.8 per cent and *Safety and Security* at 1.5 per cent. The *intensity of internal conflict* indicator deteriorated by 12.5 per cent, while *deaths from internal conflict* increased by 3.7 per cent. Haiti's crisis deepened significantly over the past year, with armed gangs allied under the 'Viv Ansanm' coalition consolidating control over much of the capital and expanding into three of the country's ten departments.[38] Between March 2025 and January 2026, over 5,500 people were killed and 2,500 were injured, while more than 1.45 million people were internally displaced. In October 2025, the United Nations authorised a new gang suppression force of up to 5,550 personnel to address the escalating security crisis.[39]

Mexico and Honduras recorded the joint largest percentage improvements in the region, with both countries' overall scores improving by two per cent on the 2026 GPI. Mexico, ranked 139th globally and 13th in the region, improved primarily on the *Ongoing Conflict* domain, which recorded a seven per cent improvement driven by a 22 per cent decrease in the *deaths from internal conflict* indicator. Conflict deaths in Mexico are now at their lowest level since 2017. While civilian killings have declined in nearly every Mexican state since 2024,[40] the security situation remains extremely challenging, with homicides rising by 400 per cent in Sinaloa in the year following the arrest of cartel leader Ismael 'El Mayo' Zambada.[41]

Honduras, ranked 96th globally and eighth in the region, improved across two of the three GPI domains. The *Militarisation* domain recorded the largest improvement at 7.7 per cent, while the *Safety and Security* domain improved by two per cent. However, the *Ongoing Conflict* domain deteriorated by 3.1 per cent, with the *deaths from internal conflict* indicator increasing by 20 per cent. The change on the *Militarisation* domain was driven by a substantial improvement in *UN peacekeeping funding* and *armed services personnel rate*.

The Dominican Republic recorded the largest deterioration in the region, with its overall score deteriorating by 4.7 per cent on the 2026 GPI. The deterioration was driven largely by the *Ongoing Conflict* domain, which deteriorated by 19.5 per cent, with 40 violent conflict deaths recorded in 2025, most related to organised criminal activity. However, although violent conflict has increased over the past year, over the longer run there has been a significant fall in violent deaths, with the *homicide rate* more than halving over the past decade.

The United States recorded a deterioration of 4 per cent on the 2026 GPI, falling to 134th globally and 12th in the region. The deterioration was driven by the *Safety and Security* domain, which increased by 6.4 per cent, and the *Ongoing Conflict* domain, which deteriorated by seven per cent. The *violent demonstrations* indicator recorded the largest deterioration at 37.5 per cent, while the *political instability* indicator deteriorated by 38.5 per cent and the *terrorism impact* indicator increased by 16.2 per cent. Political violence in the United States reached its highest level since the 1970s over the past year, with 85 per cent of Americans reporting that they believe politically motivated violence is increasing.[42]

El Salvador recorded a small improvement of 0.6 per cent on the 2026 GPI and is ranked 121st globally and 11th in the region. The improvement was driven by the *Safety and Security* domain, which improved by one per cent, while the *Ongoing Conflict* domain also recorded a marginal improvement of 0.5 per cent. However, the *Militarisation* domain deteriorated slightly by 0.3 per cent. El Salvador's state of exception, first declared in March 2022, continued to be extended throughout 2025, with more

than 84,000 suspected gang members detained by January 2025.[43] The government claimed a reduction in the national homicide rate to 1.9 per 100,000 people. The *perceptions of criminality* indicator improved by 6.5 per cent, reflecting the perceived impact of the security crackdown on public safety. Less than 10 per cent of people in the country now feel unsafe walking alone, compared to 70 per cent in 2017. However, significant human rights concerns persist regarding mass detentions, due process violations, and deaths in state custody.

SOUTH AMERICA

TABLE 1.5

South America

Regional Rank	Country	Overall Score	Score Change	Overall Rank
1	Uruguay	1.754	0.003	43
2	Chile	1.826	-0.014	52
3	Paraguay	1.882	-0.007	64
4	Argentina	1.922	0.111	72
5	Bolivia	2.054	0.033	92
6	Guyana	2.093	0.071	103
7	Peru	2.120	0.010	107
8	Brazil	2.333	-0.008	124
9	Venezuela	2.516	0.084	133
10	Ecuador	2.539	0.093	135
11	Colombia	2.735	0.123	141
	REGIONAL AVERAGE	**2.161**	**0.045**	

South America recorded the second largest deterioration in peacefulness of any region on the 2026 GPI, with the average overall score deteriorating by two per cent. Eight of the 11 countries in the region deteriorated in peacefulness over the past year, with only three countries recording improvements. The deterioration was driven overwhelmingly by the *Ongoing Conflict* domain, which recorded the largest change at 9.3 per cent. The *Militarisation* domain was largely unchanged at the regional level.

Uruguay remains the most peaceful country in South America and is ranked 43rd globally on the 2026 GPI, despite recording a slight deterioration of 0.2 per cent over the past year. The *Safety and Security* domain deteriorated by 0.8 per cent, driven by a deterioration in the *Political Terror Scale* indicator. However, the *Militarisation* domain improved by one per cent. The *Ongoing Conflict* domain remained unchanged. Despite the marginal deterioration, Uruguay continues to stand out in the region for its comparatively high levels of political stability and low levels of conflict.

Colombia remains the least peaceful country in South America and is ranked 141st globally on the 2026 GPI, with its overall score deteriorating by 4.7 per cent over the past year. The deterioration was driven primarily by the *Ongoing Conflict* domain, which increased by 13.8 per cent, with the *deaths from internal conflict* indicator recording a 14.4 per cent increase and the *internal conflicts fought* indicator deteriorating by 16 per cent. The *Safety and Security* domain also deteriorated by 0.9 per cent, while the *Militarisation* domain recorded a marginal deterioration of 0.4 per cent. The *terrorism impact* indicator deteriorated over the past year, with the overall impact of terrorism now being higher than at any point since the inception of the Index. Colombia is also one of 10 countries globally most impacted by terrorism. In January 2025, National Liberation Army (ELN) militants launched a series of attacks against FARC dissident groups in the Catatumbo region, killing at least 103 people and displacing more than 56,000. President Gustavo Petro suspended peace talks with the ELN in response. Colombia's *neighbouring countries relations* indicator deteriorated by 50 per cent, reflecting growing trade tensions with Ecuador, and concerns over terrorist activity in the Colombia-Venezuela border region.

Chile recorded the largest percentage improvement in the region, with its overall score improving by 0.8 per cent on the 2026 GPI. Ranked 52nd globally and second in the region, Chile's improvement was driven by the *Safety and Security* domain, which improved by 2.5 per cent. The *violent demonstrations* indicator recorded the largest improvement at 16.7 per cent, while the *weapons imports* indicator improved by 14.5 per cent. However, the *Militarisation* domain deteriorated by 2.1 per cent, and the *Ongoing Conflict* domain remained unchanged. Chile continues to be one of the more peaceful countries in the region, although its *homicide rate* has tripled since 2017.

Argentina recorded the largest percentage deterioration in the region on the 2026 GPI, with its overall score deteriorating by 6.1 per cent. Argentina's decline was driven by the *Ongoing Conflict* domain, which deteriorated by 18.9 per cent, with the *deaths from internal conflict* indicator deteriorating substantially as a result of such deaths climbing from 0 to 114. The *internal conflicts fought* indicator deteriorated by 10.5 per cent. The *Safety and Security* domain also deteriorated by 3.1 per cent, driven by a 71.4 per cent increase in the *violent demonstrations* indicator. This was closely linked to political unrest following the government's austerity program, which triggered widespread protests throughout 2025. In March 2025, a protest by pensioners in Buenos Aires was met with a violent security response, leaving hundreds injured.[44]

Ecuador recorded a deterioration of 3.8 per cent on the 2026 GPI, falling to 135th globally and 10th in the region. The deterioration was driven by the *Ongoing Conflict* domain, which increased by 11.9 per cent, with the *terrorism impact* indicator deteriorating by 37.3 per cent. Ecuador's security crisis continued to deepen over the past year, with the country recording the highest homicide rate in Latin America for the third consecutive year. President Daniel Noboa maintained a state of emergency across several provinces and expanded the military's role in public security.[45] The competition between the Los Lobos and Los Choneros gangs remained a key driver of violence.

Venezuela recorded a deterioration of 3.5 per cent on the 2026 GPI, falling to 133rd globally and ninth in the region. The deterioration was driven primarily by the *Ongoing Conflict* domain, which increased by 21.5 per cent, with the *intensity of internal conflict* indicator recording a 50 per cent increase and the *deaths from internal conflict* indicator deteriorating by 36.9 per cent. However, the *Safety and Security* domain improved by 3.4 per cent, driven by improvements in the *perceptions of*

criminality and *violent crime* indicators. Venezuela's political crisis intensified following the disputed July 2024 presidential election, in which incumbent Nicolás Maduro claimed victory despite evidence from independent observers indicating the opposition had won.[46] Mass protests disputing the results were met with a violent security crackdown, with thousands arrested during the post-election period. The country's political crisis reached a high point in early 2026, when US forces struck targets around Caracas and extracted President Nicolás Maduro, who was flown to New York and arraigned on narco-terrorism charges.

SOUTH ASIA

TABLE 1.6

South Asia

Regional Rank	Country	Overall Score	Score Change	Overall Rank
1	Bhutan	1.546	0.006	16
2	Sri Lanka	1.910	-0.045	67
3	Nepal	2.143	0.179	111
4	Bangladesh	2.226	-0.017	117
5	India	2.409	0.069	127
6	Pakistan	2.919	0.152	152
7	Afghanistan	3.106	0.014	157
	REGIONAL AVERAGE	**2.323**	**0.051**	

South Asia recorded the worst deterioration in peacefulness on the 2026 GPI, with the average overall score deteriorating by 2.3 per cent. The region is ranked seventh of the eight GPI regions. Five of the seven countries in the region deteriorated, with only two recording improvements. The deterioration was driven overwhelmingly by the *Ongoing Conflict* domain, which recorded the largest change at 7.1 per cent, reflecting escalating internal conflicts and cross-border tensions across the subcontinent. The *Safety and Security* domain was relatively stable, while the *Militarisation* domain recorded a small average deterioration.

Bhutan remains the most peaceful country in South Asia and is ranked 16th globally on the 2026 GPI. In 2008, it was ranked 69th globally. Bhutan recorded a marginal deterioration of 0.4 per cent over the past year. The *Militarisation* domain deteriorated by 1.4 per cent, driven by a 13.4 per cent deterioration in the *UN peacekeeping funding* indicator. The *Ongoing Conflict* domain also recorded a marginal deterioration of 0.7 per cent. Despite the slight deterioration, Bhutan continues to stand out as a regional outlier, with a score significantly more peaceful than the regional average.

Afghanistan remains the least peaceful country in South Asia and is ranked 157th globally on the 2026 GPI. Afghanistan recorded a marginal deterioration of 0.5 per cent, though this obscures several significant shifts across the GPI indicators. The *Safety and Security* domain improved by 1.5 per cent, with the *political instability* indicator improving by 10 per cent. This is largely the result of the Taliban further consolidating control over political institutions and security structures under a highly centralised system. The absence of organised political opposition and suppression of dissent have reduced the risk of large-scale unrest. However, exclusionary governance and continued international isolation, alongside restrictions on political participation, pose risks to longer-term stability. The *Ongoing Conflict* domain deteriorated by 1.9 per cent, with the *deaths from external conflict* indicator increasing by 19.2 per cent, reflecting cross-border clashes with Pakistani forces.

Sri Lanka recorded the largest percentage improvement in the region on the 2026 GPI, with its overall score improving by 2.3 per cent. It is the second most peaceful country in the South Asia region and is ranked 67th globally. Sri Lanka's improvement was driven by the *Militarisation* domain, which improved by 6.4 per cent, with the *UN peacekeeping funding* indicator improving by 40.8 per cent. The *Safety and Security* domain also improved by 1.8 per cent, driven by a 25 per cent improvement in the *political instability* indicator. Sri Lanka's improvement reflects ongoing stabilisation following the 2022 economic crisis. Reduced inflationary pressures and progress in economic reforms have eased public dissatisfaction. The economy grew by five per cent in 2024, and inflation remained negative. These economic gains were further supported by a landmark debt restructuring agreement that was reached with bondholders in late 2024.[47]

Nepal recorded the largest deterioration in South Asia and one of the largest globally on the 2026 GPI, with its overall score deteriorating by 9.1 per cent. Nepal's deterioration was driven primarily by the *Ongoing Conflict* domain, which deteriorated by 23.4 per cent. The *intensity of internal conflict* indicator recorded a 100 per cent deterioration, while the *violent demonstrations* indicator deteriorated by 45.5 per cent and the *terrorism impact* indicator improved by 22.8 per cent. Nepal's dramatic deterioration was precipitated by youth-led 'Gen Z' protests in September 2025. A government ban on 26 social media platforms triggered mass demonstrations that escalated into violent clashes after police killed 19 protesters on 8 September.[48] At least 75 civilians were killed and over 2,000 injured before the Prime Minister resigned on 9 September, plunging the country into a constitutional crisis.

Pakistan recorded a deterioration of 5.5 per cent on the 2026 GPI, falling to 152nd globally. The deterioration was driven overwhelmingly by the *Ongoing Conflict* domain, which increased by 17 per cent. The *deaths from internal conflict* indicator deteriorated by 11.4 per cent, the *internal conflicts fought* indicator by 10.5 per cent, the *neighbouring countries relations* indicator by 33.3 per cent, and the *deaths from external conflict* indicator by 86.9 per cent. Pakistan was ranked first on the 2026 Global Terrorism Index, with terrorism-related deaths reaching 1,139 in 2025. Balochistan and Khyber Pakhtunkhwa collectively accounted for over 74 per cent of terrorist attacks. Cross-border tensions with Afghanistan also escalated significantly as the result of TTP activity in the border region.

India recorded a deterioration of 2.9 per cent on the 2026 GPI and is now ranked 127th globally. The deterioration was driven by the *Ongoing Conflict* domain, which increased by 9.2 per cent, with the *deaths from internal conflict* indicator deteriorating by five per cent and the *neighbouring countries relations* indicator deteriorating by 33 per cent, as tensions increased with both Pakistan and Myanmar. The ongoing ethnic conflict in India's northeastern state of Manipur continued through 2025, with more than 260 people killed and 60,000 displaced since the violence began in May 2023.[49] The conflict, between the Meitei majority and the Kuki-Zo community, led to the resignation of Manipur's Chief Minister in February 2025 and the imposition of

President's Rule. The situation was further complicated by instability along the Myanmar border, which facilitated the influx of weapons and narcotics into the region.

SUB-SAHARAN AFRICA

TABLE 1.7

Sub-Saharan Africa

Regional Rank	Country	Overall Score	Score Change	Overall Rank
1	Mauritius	1.586	-0.056	18
2	Equatorial Guinea	1.729	-0.105	38
3	Botswana	1.823	0.045	50
4	The Gambia	1.837	-0.004	56
5	Madagascar	1.849	0.001	59
6	Namibia	1.872	0.029	63
7	Sierra Leone	1.937	-0.024	74
8	Senegal	1.939	-0.034	75
9	Ghana	1.943	0.034	76
10	Angola	1.955	-0.025	78
11	Zambia	1.992	0.039	82
12	Malawi	1.994	0.128	83
13	Guinea-Bissau	2.012	-0.022	85
14	Lesotho	2.016	-0.126	86
15	Liberia	2.024	-0.059	87
16	Zimbabwe	2.051	-0.018	90
17	Côte d'Ivoire	2.061	0.099	93
18	Tanzania	2.080	0.142	98
19	Gabon	2.086	-0.132	100
20	Eswatini	2.095	-0.028	104
21	Djibouti	2.098	-0.034	105
22	Mauritania	2.184	0.011	112
23	Rwanda	2.200	0.066	114
24	Guinea	2.220	0.001	116
25	Togo	2.251	-0.096	119
26	Republic of the Congo	2.256	0.165	120
27	Benin	2.293	0.038	122
28	South Africa	2.308	0.084	123
29	Mozambique	2.383	-0.023	126
30	Eritrea	2.412	-0.027	128
31	Burundi	2.417	-0.105	129
32	Uganda	2.420	0.083	130
33	Kenya	2.447	-0.033	132
34	Cameroon	2.634	-0.061	137
35	Ethiopia	2.648	-0.020	138
36	Nigeria	2.755	-0.077	142
37	Chad	2.769	0.166	145
38	Niger	2.832	0.079	146
39	Burkina Faso	2.882	-0.035	149
40	Central African Republic	2.906	0.030	150
41	Somalia	2.973	0.128	153
42	Mali	2.996	0.056	154
43	South Sudan	3.116	0.034	158
44	Democratic Republic of the Congo	3.189	-0.098	161
	REGIONAL AVERAGE	**2.283**	**0.005**	

Sub-Saharan Africa recorded a slight deterioration in peacefulness on the 2026 GPI, with the average overall score deteriorating by 0.2 per cent. The region remains the third least peaceful of the eight GPI regions. Of the 44 countries in the region, 23 recorded improvements while 21 deteriorated. The deterioration was driven primarily by the *Ongoing Conflict* domain, which recorded the largest change at 1.9 per cent. Sub-Saharan Africa is now home to eight of the 20 least peaceful countries in the world, compared to just five in 2008. The fall in peacefulness in the region over the longer term has been driven by the rise in violent conflict across the continent, in particular the increase in terrorism in the Central Sahel region.

Mauritius remains the most peaceful country in sub-Saharan Africa and is ranked 18th globally on the 2026 GPI. Mauritius recorded an improvement of 3.4 per cent over the past year, with improvements across all three GPI domains. The *Ongoing Conflict* domain recorded the largest improvement at 8.3 per cent, followed by the *Safety and Security* domain at 1.7 per cent and *Militarisation* at 2.5 per cent. The change was driven by improvements on the *intensity of internal conflict* and *political instability* indicators. Mauritius continues to stand out in the region for its comparatively low levels of conflict and strong institutional stability. The absence of major political crises or widespread unrest has reinforced institutional continuity. Political competition remains active but largely peaceful, reflecting a mature democratic system.

The Democratic Republic of the Congo remains the least peaceful country in sub-Saharan Africa and is ranked 161st globally on the 2026 GPI. Despite this, the DRC recorded an improvement of three per cent in its overall score over the past year, with improvements across all three domains. The *Militarisation* domain improved by 7.6 per cent, while the *Safety and Security* domain improved by 2.1 per cent and *Ongoing Conflict* by 1.3 per cent. However, the country's conflict situation remains among the most severe in the world, after M23 rebels captured Goma, the capital of North Kivu, in January 2025 and subsequently seized Bukavu, the capital of South Kivu.[50] More than seven million people are now internally displaced across the DRC, making it one of the world's largest displacement crises and underreported conflicts globally.[51] The *deaths from internal conflict* and *internal conflicts fought* indicators remain at or near the highest possible levels.

Lesotho and Gabon recorded the joint largest percentage improvements in the region, with both countries' overall scores improving by 5.9 per cent on the 2026 GPI. Lesotho, ranked 86th

globally, improved across all three domains, with the *Ongoing Conflict* domain recording the largest improvement at 10.4 per cent, followed by the *Safety and Security* domain at 6.8 per cent. The improvement was driven by substantial gains on the *violent demonstrations* and *violent crime* indicators. Over the past year, Lesotho continued to advance security sector reform, with parliament passing a constitutional amendment to establish an Independent Security Sector Oversight Authority.[52]

Gabon, ranked 100th globally and 19th in the region, also improved across all three GPI domains. The *Militarisation* domain recorded the largest improvement at 11.5 per cent, while the *Ongoing Conflict* domain improved by 6.7 per cent and *Safety and Security* by 3.4 per cent. Gabon's improvement follows the August 2023 coup that ended the 56-year rule of the Bongo family. In April 2025, the country held its first post-coup elections, with transitional leader Brice Clotaire Oligui Nguema winning the presidency and being inaugurated in May 2025.[53] The *political instability* and *intensity of internal conflict* indicators both recorded notable improvements, reflecting a stabilisation of the political environment during the transition period.

The Republic of the Congo recorded the largest deterioration in the region on the 2026 GPI, with its overall score deteriorating by 7.9 per cent, with deteriorations recorded across all three domains. The *Safety and Security* domain recorded the largest deterioration at 12.2 per cent, driven by increases in *violent crime, perceptions of criminality*, and *violent demonstrations*. There were six instances of mob violence in 2025, resulting in 17 fatalities. Rising gang activity and urban crime in Brazzaville and Pointe-Noire continued to undermine security in the country over the past year. Over a quarter of citizens reported being a victim of violent crime in the past year, with 60 per cent of people saying they felt unsafe walking alone at night in their cities or neighbourhoods.

Tanzania recorded the second largest deterioration in the region, with its overall score deteriorating by 7.3 per cent on the 2026 GPI. The change was driven primarily by the *Ongoing Conflict* domain, which deteriorated by 15.2 per cent. The largest deteriorations occurred on the *deaths from internal conflict* indicator, which recorded a 78.3 per cent increase, and the *intensity of internal conflicts* indicator. The *Safety and Security* domain also deteriorated by four per cent. Tanzania's disputed October 2025 elections and the subsequent violent crackdown on protests were key drivers of the deterioration. The elections were followed by a six-day security crackdown and internet blackout.[54] Human rights organisations documented extrajudicial killings, enforced disappearances, and widespread arrests during the post-election period.[55]

Chad recorded a deterioration of 6.4 per cent on the 2026 GPI, falling to 145th globally. The deterioration was driven overwhelmingly by the *Ongoing Conflict* domain, which deteriorated by 19.2 per cent. The Central Sahel region continues to face severe security challenges, with the broader Sahel now accounting for over half of all terrorism-related deaths worldwide.[56] Chad, Niger, Burkina Faso, and Mali all remain among the least peaceful countries in the region.

Nigeria recorded an improvement of 2.7 per cent on the 2026 GPI, rising to 142nd globally, driven by improvements across all three domains. The *Militarisation* domain recorded the largest improvement at 8.9 per cent, followed by the *Safety and Security* domain at 1.7 per cent and *Ongoing Conflict* at 0.7 per cent. However, the security environment in Nigeria's northeast remained extremely challenging, with the Islamic State West Africa Province (ISWAP) launching at least 12 coordinated attacks on military bases and infrastructure across Borno State in 2025, while mass abductions escalated sharply across northern Nigeria in late 2025.[57] Nigeria's *deaths from internal conflict* indicator deteriorated by 21.2 per cent, partially offset by improvements in *perceptions of criminality* and other safety indicators.

WESTERN AND CENTRAL EUROPE

TABLE 1.8

Western and Central Europe

Regional Rank	Country	Overall Score	Score Change	Overall Rank
1	Iceland	1.161	-0.024	1
2	Switzerland	1.363	0.016	3
3	Slovenia	1.369	-0.032	4
4	Ireland	1.371	0.015	5
5	Austria	1.421	0.044	6
6	Portugal	1.427	-0.020	7
7	Finland	1.478	-0.002	9
8	Denmark	1.504	0.048	11
9	Czechia	1.517	0.007	13
10	Hungary	1.538	0.012	15
11	Netherlands	1.566	0.031	17
12	Latvia	1.589	0.022	19
13	Belgium	1.608	0.074	21
14	Poland	1.615	-0.161	22
15	Croatia	1.619	0.013	23
16	Lithuania	1.620	-0.008	24
17	Estonia	1.623	0.052	25
18	Spain	1.654	0.002	27
19	Germany	1.657	0.065	28
20	Slovakia	1.661	0.034	29
21	Montenegro	1.672	0.038	30
22	Norway	1.688	-0.005	33
23	Italy	1.712	0.001	35
24	Albania	1.725	-0.029	36
25	United Kingdom	1.730	0.051	39
26	Sweden	1.732	0.009	40
27	North Macedonia	1.792	0.001	46
28	Bosnia and Herzegovina	1.810	-0.020	48
29	Greece	1.828	0.010	53
30	Kosovo	1.830	0.016	54

31	Serbia	1.919	-0.003	70
32	Cyprus	1.967	0.073	80
33	France	2.083	0.010	99
	REGIONAL AVERAGE	**1.632**	**0.010**	

Western and Central Europe remains the most peaceful region in the world on the 2026 GPI, although it recorded an average deterioration of 0.6 per cent over the past year. Twenty-two of the 33 countries in the region deteriorated, 10 improved, and one was unchanged. The *Militarisation* domain recorded the largest deterioration at 2.5 per cent, driven by a broad increase in defence expenditure across the region as European NATO members raised spending by 20 per cent in real terms in 2025.[58] The *Safety and Security* domain also deteriorated, while the *Ongoing Conflict* domain was relatively stable. Despite the deterioration, the region is home to seven of the world's 10 most peaceful countries, with Iceland ranked first globally and France ranked 99th globally.

Iceland remains the most peaceful country in the world for the 19th consecutive year. Iceland recorded an improvement in peacefulness of two per cent over the past year. The *Safety and Security* domain improved by four per cent, driven by a 42.9 per cent improvement in the *violent demonstrations* indicator. The *Ongoing Conflict* domain remained unchanged, and the *Militarisation* domain improved marginally by 0.3 per cent. Iceland's exceptional position is underpinned by the absence of a standing military, very low crime rates, and strong social cohesion. It is the most peaceful country in the world by a significant margin.

France is the least peaceful country in Western and Central Europe. France recorded a marginal deterioration of 0.5 per cent over the past year. The *Safety and Security* domain deteriorated by two per cent, driven by deteriorations in both *violent crime* and *perceptions of criminality*. More than one in four people in France say they do not feel safe walking alone at night, and just under one in 10 people say they have been the victim of a violent crime in the past year, the highest rate in the region. France experienced significant civil unrest in September 2025, when the 'Block Everything' protest movement brought hundreds of thousands of people onto the streets in opposition to government austerity measures, resulting in clashes with police and more than 300 arrests.[59]

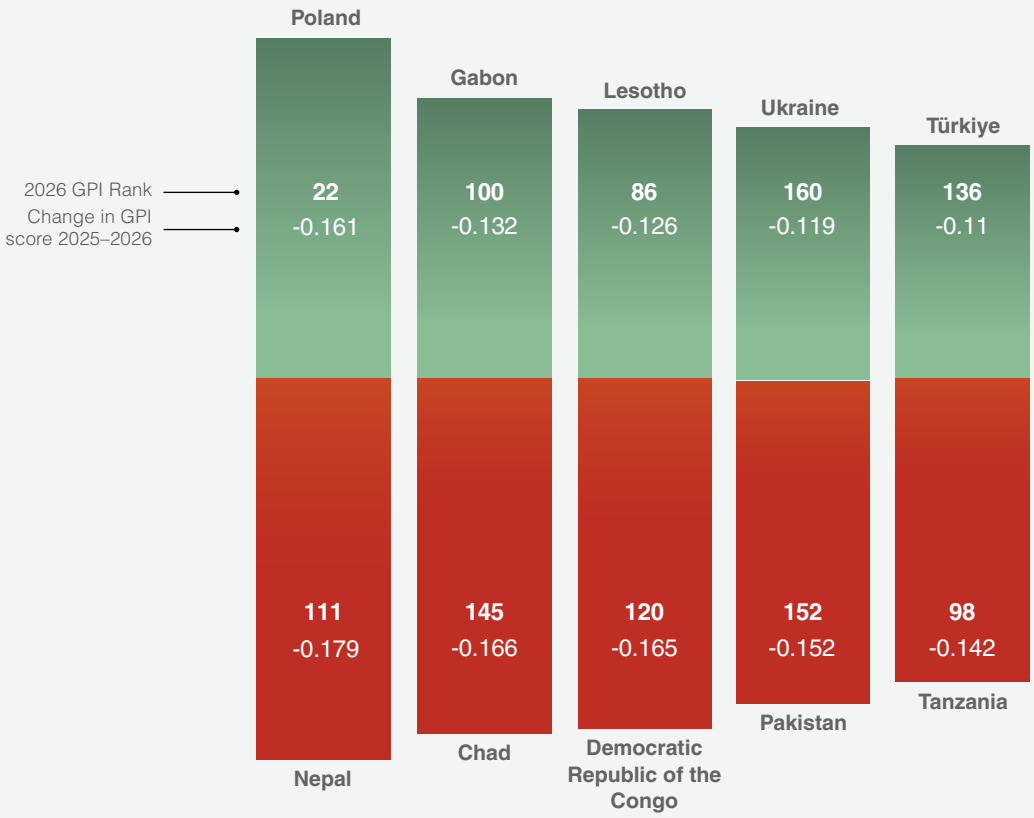
Poland recorded the largest improvement in the region and one of the largest globally on the 2026 GPI, with its overall score improving by 9.1 per cent. Poland is now ranked 22nd globally. Its improvement was driven by substantial changes across both the *Safety and Security* and *Ongoing Conflict* domains. The *Safety and Security* domain improved by 9.6 per cent, with the *Political Terror Scale* indicator improving by 25 per cent, the *violent demonstrations* indicator by 22.2 per cent, and the *political instability* indicator by 15.4 per cent. Poland's improvement reflects the political transition that followed the change of government in late 2023, as the new government restored judicial independence, unblocked EU funding, and re-engaged with European institutions.[60] However, concerns about the ongoing conflict in Ukraine led to the *Militarisation* domain deteriorating by 3.6 per cent, with the *weapons imports* indicator increasing by 31.8 per cent.

Belgium recorded the largest deterioration in the region on the 2026 GPI, with its overall score deteriorating by 4.8 per cent. Ranked 21st globally and 13th in the region, Belgium's decline was driven primarily by the *Militarisation* domain, which deteriorated by 10.9 per cent. The *UN peacekeeping funding* indicator recorded a 57 per cent deterioration, the *military expenditure* indicator deteriorated by 20.3 per cent, and the *weapons imports* indicator deteriorated by 17.9 per cent. Belgium's militarisation deterioration reflects its accelerated effort to meet NATO's defence spending target, with the country nearly reaching the two per cent of GDP threshold in 2025 after spending just 1.25 per cent the previous year.

Germany recorded a deterioration of 4.1 per cent on the 2026 GPI, falling to 28th globally and 19th in the region. The deterioration was driven by the *Safety and Security* domain, which increased by 8.3 per cent. The *Political Terror Scale* indicator deteriorated by 50 per cent, the *violent demonstrations* indicator by 25 per cent, and the *violent crime* indicator by 18.2 per cent. Germany experienced a record 40 per cent rise in politically motivated crimes in 2024.[61] The anti-immigration Alternative for Germany (AfD) party achieved its best-ever result in the February 2025 general election with over 20 per cent of the vote. The *Militarisation* domain also deteriorated by four per cent, with the *weapons imports* indicator increasing by 21.4 per cent. Germany is now above the two per cent target for military expenditure as a percentage of GDP.

The United Kingdom recorded a deterioration of three per cent on the 2026 GPI, falling to 39th globally and 25th in the region. The deterioration was driven primarily by the *Ongoing Conflict* domain, which increased by 11.2 per cent. The *intensity of internal conflict* indicator deteriorated by 25 per cent, while the *external conflicts fought* indicator also deteriorated by 25.4 per cent. The UK maintained a significant overseas military presence through 2025, including operations in the Gulf, the Red Sea, and contributions to NATO's eastern flank.[62] The June 2025 Strategic Defence Review prioritised warfighting readiness with a NATO-first approach, while the country withdrew its permanent maritime presence from the Middle East for the first time since 1980.

Improvements and Deteriorations



Five Largest Improvements in Peace

Poland

Rank: 22

Change in Score 2025-2026:	Change in Rank 2025-2026:
1.615	↑23

Poland recorded the largest improvement in peacefulness on the 2026 GPI, with its overall score improving by 9.1 per cent. Poland is now ranked 22nd, rising 23 places in the rankings from 45th in 2025, its lowest rank in the history of the Index. Two of the three GPI domains recorded improvements, with the *Ongoing Conflict* domain recording the largest change. Eleven indicators improved, five deteriorated, and seven recorded no change.

The largest improvement was on the *Ongoing Conflict* domain, which improved by 17.5 per cent. This was primarily driven by a 33.3 per cent improvement in *neighbouring countries relations*, reflecting a significant shift in Poland's diplomatic posture under the coalition government which took office in December 2023. In May 2025, Poland and France signed a historic Treaty on Enhanced Cooperation and Friendship, which includes mutual security guarantees and a commitment to provide military assistance in the event of an armed attack on either country, only the second such agreement France has made alongside its pact with Germany.[63] Poland also deepened security cooperation with Sweden, the Baltic states, and other NATO partners,[64] and continued to play a leading role in supporting Ukraine. The *intensity of internal conflict* indicator also improved by 20 per cent, while *political instability* improved by 15.4 per cent, reflecting the stabilisation of the domestic political environment following the transition from the previous government.[65]

The *Safety and Security* domain recorded a 9.6 per cent improvement, the second largest of the three domains. *Violent demonstrations* improved by 22.2 per cent, as the large-scale political protests that characterised the final years of PiS rule subsided under the new government. The *Political Terror Scale* improved by 25 per cent, which is likely associated with the Tusk government's efforts to restore the rule of law and reverse the politicisation of judicial institutions that had drawn sustained criticism from the European Union.[66] Poland also recorded improvements in *violent crime*, which improved by 11.1 per cent, and *perceptions of criminality*, which improved by seven per cent. Poland's homicide rate is among the lowest in Europe, and survey data indicates that nearly nine in 10 Poles consider the country a safe place to live.[67]

Despite the broad-based improvement, Poland recorded a deterioration on the *Militarisation* domain, which worsened by 3.6 per cent. The primary driver was a 31.8 per cent deterioration in *weapons imports*, reflecting Poland's accelerating military build-up in response to the ongoing conflict in neighbouring Ukraine. Poland has become NATO's largest arms importer,[68] with defence spending reaching an estimated 4.5 per cent of GDP in 2025 and projected to approach 4.8 per cent in 2026, one of the highest rates among NATO members. Major procurement programs include South Korean K2 tanks, American F-35 fighter jets, HIMARS rocket launchers, and Patriot missile defence systems.[69] *Nuclear and heavy weapons* and *weapons exports* also recorded minor deteriorations of 1.4 and 2.1 per cent, respectively. While Poland's investment in defence capability reflects the heightened security environment in Eastern Europe, the scale of its rearmament is likely to continue placing upward pressure on the *Militarisation* domain in future years.

Gabon

Rank: 100

Change in Score 2025-2026:	Change in Rank 2025-2026:
2.086	↑17

Gabon recorded the second largest improvement in peacefulness on the 2026 GPI, with its overall score improving by six per cent. Gabon is now ranked 100th, rising 17 places in the rankings from 117th in 2025. All three GPI domains recorded improvements, with the *Militarisation* domain recording the largest change. Eight indicators improved, two deteriorated, and 13 recorded no change.

The improvement follows a period of political transition that began with the military coup of August 2023, which ended over five decades of rule by the Bongo family.[70] Transition leader General Brice Oligui Nguema oversaw the adoption of a new constitution by referendum in November 2024, approved by 92 per cent of voters, before winning the presidential election in April 2025 with approximately 90 per cent of the vote and a turnout of 70.4 per cent.[71] The relatively orderly nature of the transition is reflected in the GPI data: *political instability* improved by 10.3 per cent and *intensity of internal conflict* improved by 20 per cent.

The *Militarisation* domain recorded the largest improvement of the three domains at 11.5 per cent, driven primarily by a 40.1 per cent improvement in *UN peacekeeping funding*. The *Ongoing Conflict* domain improved by 6.7 per cent, with *external conflicts fought* improving by 11.1 per cent. The *Safety and Security* domain also recorded a modest improvement of 3.4 per cent, supported by a 9.1 per cent improvement in *violent crime* and a 3.9 per cent improvement in *perceptions of criminality*.

Despite the broad-based improvement, significant concerns remain about Gabon's longer-term trajectory. Concerns have been raised about ongoing restrictions on free expression, media freedom, and the independence of the judiciary under the transitional and post-election government.[72] Some analysts have characterised the transition as a shift from one form of autocratic governance to another, noting that Oligui Nguema remains part of the same political establishment that has governed Gabon for decades.[73] The country's continued economic dependence on oil revenues and rising public debt also present risks to long-term stability.

Lesotho

Rank: 86

Change in Score 2025-2026:	Change in Rank 2025-2026:
2.016	↑27

Lesotho recorded the third largest improvement in peacefulness on the 2026 GPI, with its overall score improving by 5.9 per cent. Lesotho is now ranked 86th, rising 27 places in the rankings from 113th in 2025, its largest single-year improvement in the history of the Index. Two of the three GPI domains recorded improvements, with the *Ongoing Conflict* domain recording the largest change. Six indicators improved, three deteriorated, and 14 recorded no change.

The *Ongoing Conflict* domain recorded the largest improvement at 10.4 per cent, driven primarily by a 33.3 per cent improvement in *neighbouring countries relations*. Relations between Lesotho and South Africa, its sole neighbour, have remained structurally strong despite periodic tensions, underpinned by shared trade, infrastructure, and regional commitments through the Southern African Development Community.[74] The *Safety and Security* domain improved by 6.8 per cent, with *violent demonstrations* recording the largest improvement of any indicator at 55.6 per cent. This improvement coincides with a period of constitutional reform, as the National Assembly completed the Tenth Amendment to the Constitution in early 2025, which established parliamentary oversight of government expenditure, strengthened the independence of the Human Rights Commission, and entrenched a new anti-corruption commission within the constitution.[75] *Violent crime* also improved by 20 per cent, in part reflecting government efforts to address the threat posed by Famo gangs, which had escalated from rivalries within the performing arts into organised criminal violence. The government invoked the Internal Security Act, banned 12 Famo music groups suspected of involvement in deadly rivalries, and deployed the Lesotho Defence Force to combat gang violence.[76]

Despite the improvement, Lesotho continues to face serious security challenges. The country's *homicide rate* indicator remains among the highest in the world, and *access to small arms* is widespread. Police have also been accused of using excessive force to disperse demonstrations, including the whipping and arrest of taxi operators protesting government policies related to the Lesotho Highlands Water Project.[77] While the constitutional reforms represent a significant step forward, Lesotho's history of chronic political instability suggests that sustained improvement will depend on the effective implementation of these governance changes.[78]

Ukraine

Rank: 160

Change in Score 2025-2026:	Change in Rank 2025-2026:
3.184	↑2

Ukraine recorded the fourth largest improvement in peacefulness on the 2026 GPI, with its overall score improving by 3.6 per cent. Ukraine now ranks 160th on the Index, rising two places from its lowest-ever ranking of 162nd in 2025. All three GPI domains recorded improvements, with seven indicators improving, five deteriorating, and 11 recording no change. Despite these improvements, Ukraine remains among the five least peaceful countries in the world.

The largest improvement occurred on the *Safety and Security* domain, which improved by 4.9 per cent, driven largely by a notable improvement on the *Political Terror Scale* indicator together with smaller improvements in the *homicide rate* and *police rate* indicators. The *Ongoing Conflict* domain also improved, by 3.8 per cent, reflecting a decrease in the *deaths from external conflict* indicator as frontline combat stabilised into protracted attritional warfare during 2025. Direct negotiations between Russian and Ukrainian officials resumed in May 2025 for the first time in three years, with a second round held in June. Although neither round produced a ceasefire, both sides committed to prisoner exchanges and further dialogue.

However, the overall improvement masks continued large-scale civilian harm. In the first eight months of 2025, civilian casualties rose by approximately 40 per cent compared with the same period in 2024, and more than 5,800 Shahed-type drones were launched between July and September alone, primarily against Kyiv, Lviv, Dnipro and Mykolaiv.[79] The *political instability* and *internal conflicts fought* indicators also deteriorated. Ukraine continues to record the least peaceful possible score on six indicators, including *refugees and IDPs*, *neighbouring countries relations*, *weapons imports* and *military expenditure (% of GDP)*, underscoring that its improvement has occurred from a base of extreme fragility rather than signalling a broader return to peace.

Türkiye

Rank: 136

Change in Score 2025-2026:	Change in Rank 2025-2026:
2.605	↑8

Türkiye recorded the fifth largest improvement in peacefulness on the 2026 GPI, with its overall score improving by 4.1 per cent. Türkiye now ranks 136th on the Index, rising eight places and recording its best ranking since 2014. Eleven indicators improved, eight deteriorated, and four recorded no change. The *Ongoing Conflict* and *Safety and Security* domains both improved, while the *Militarisation* domain recorded a marginal deterioration of one per cent.

The primary driver of the improvement was the sustained peace process between the Turkish government and the Kurdistan Workers' Party (PKK). Following PKK leader Abdullah Öcalan's February 2025 call for the group to disarm, the PKK announced a unilateral ceasefire in March, formally declared its dissolution in May, and held a symbolic weapons-destruction ceremony in Iraqi Kurdistan in July. In October, the organisation announced the complete withdrawal of its forces from Turkish territory.[80] This shift is reflected most clearly in the *Ongoing Conflict* domain, which improved by 7.4 per cent, with *deaths from internal conflict* improving by 28.6 per cent and *internal conflicts fought* and *terrorism impact* also recording improvements. However, Kurdish demands for constitutional reforms, expanded cultural rights and improvements in Öcalan's imprisonment conditions remain largely unaddressed, raising questions about the durability of the disarmament. The *Safety*

and Security domain improved by 3.4 per cent, led by reductions in the *Political Terror Scale* and *perceptions of criminality* indicators.

However, the peace process remains fragile and has been accompanied by a marked tightening of domestic political space. In March 2025, Istanbul mayor Ekrem İmamoğlu, widely viewed as the main opposition challenger to President Recep Tayyip Erdoğan, was detained on corruption and terrorism-related charges and later imprisoned, triggering the largest street protests in Türkiye since the 2013 Gezi demonstrations.[81] The *incarceration rate* indicator deteriorated by 12.9 per cent and the *political instability* indicator also deteriorated, as the political environment in Türkiye became more volatile in 2025 amid heightened regional tensions and conflict spillovers from the Middle East.

Five Largest Deteriorations in Peace

Nepal

Rank: 111

Change in Score 2025-2026:	Change in Rank 2025-2026:
2.143	↓26

Nepal experienced the largest deterioration in peacefulness on the 2026 GPI, falling 26 places in the rankings to 111th, its lowest ranking since 2008. Its overall score deteriorated by 9.1 per cent. The deterioration reverses an improvement recorded in 2025 and represents a significant setback for a country that had been gradually improving in peacefulness over the past decade. All three GPI domains recorded deteriorations, with the *Ongoing Conflict* domain recording the largest change. Seven indicators deteriorated, four improved, and 12 recorded no change.

The primary driver of the deterioration was the large-scale Gen Z protests that erupted across Nepal in September 2025. Triggered by the government's decision on 4 September to ban 26 major social media platforms, including Facebook, YouTube, WhatsApp, and Instagram, the protests rapidly escalated into a broader movement against corruption, inequality, and the perceived mismanagement of public funds.[82] Security forces responded with live ammunition, rubber bullets, tear gas, and water cannons. By the end of September, at least 75 civilians had been killed and more than 2,000 injured, with forensic reports indicating that the majority of gunshot victims were struck above the waist.[83]

The crisis led to the resignation of Prime Minister K. P. Sharma Oli on 9 September, the appointment of Sushila Karki as interim prime minister, and the dissolution of parliament ahead of elections in March 2026. These events are reflected in the GPI data: the *Ongoing Conflict* domain deteriorated by 23.4 per cent, driven by a 100 per cent deterioration in *intensity of internal conflict*. The *Safety and Security* domain deteriorated by 3.9 per cent, with *violent demonstrations* deteriorating by 45.5 per cent and *political instability* worsening by 6.2 per cent.

The *Militarisation* domain also deteriorated by 4.2 per cent, driven by a 23 per cent deterioration in *UN peacekeeping funding*. *Perceptions of criminality* deteriorated by 1.8 per cent, while minor deteriorations were recorded on *weapons imports* and *armed services personnel rate*. The scale of the government's violent response to the protests drew condemnation from human rights organisations, with both Human Rights Watch and Amnesty International calling for accountability for the unlawful use of force against demonstrators.[84]

Despite the overall deterioration, Nepal recorded improvements on four indicators. *Terrorism impact* improved by 22.8 per cent, while *violent crime* improved by 12.5 per cent. The March 2026 elections, which delivered a landslide victory to the Rastriya Swatantra Party under 35-year-old leader Balendra Shah, may signal a generational shift in Nepalese politics.[85] Whether this political transition leads to a recovery in peacefulness will depend on the new government's ability to address the grievances that drove the protests and to restore public confidence in democratic institutions.[86]

Chad

Rank: 145

Change in Score 2025-2026:	Change in Rank 2025-2026:
2.769	↓9

Chad recorded the second largest deterioration in peacefulness on the 2026 GPI, falling nine places in the rankings to 145th, its least peaceful ranking in the history of the Index. Its overall score deteriorated by 6.4 per cent. Eight indicators improved, six deteriorated, and nine recorded no change. The *Ongoing Conflict* domain recorded a substantial deterioration of 19.2 per cent, and the *Safety and Security* domain deteriorated by a more modest 2.5 per cent, though the *Militarisation* domain improved by 4.4 per cent.

The primary driver of Chad's worsening score was a deterioration on the *neighbouring countries relations* indicator. This reflects the compounding pressures on Chad from the ongoing civil war in Sudan, which has driven over 1.2 million refugees into eastern Chad since April 2023, with a renewed influx beginning in late April 2025 following the Rapid Support Forces' assault on the Zamzam and Abu Shouk displacement camps in North Darfur.[87] The refugee crisis has placed unsustainable pressure on Chadian host communities and infrastructure, while humanitarian funding fell by roughly two thirds between 2024 and 2025. Increased flows of weapons and armed actors across the border have in turn contributed to insecurity in Chad's eastern provinces.

Domestic instability also deepened. On 8 January 2025, gunmen launched an attack on the presidential complex in N'Djamena, resulting in 20 deaths. The government initially described the incident as the work of disorganised bandits, although subsequent reporting has pointed to a link with Boko Haram[88].

The *violent demonstrations* indicator deteriorated by 21.4 per cent and the *intensity of internal conflict* indicator rose by 16.7 per cent. Parliamentary elections held in January 2025 were boycotted by more than 10 opposition parties.

However, some indicators had notable improvement. The *UN peacekeeping funding* indicator improved by 43.6 per cent, the largest single-indicator improvement recorded by the country. The *terrorism impact*, *external conflicts fought*, *internal conflicts fought* and *perceptions of criminality* indicators all also improved. Even so, the scale of the deterioration on the *Ongoing Conflict* domain dominated Chad's overall position, and the combination of cross-border spillover from Sudan and domestic political contestation suggests further volatility is likely in the period ahead.

Republic of the Congo

Rank: 120

Change in Score 2025-2026:	Change in Rank 2025-2026:
2.256	↓15

The Republic of the Congo recorded the third largest deterioration in peacefulness on the 2026 GPI, falling 15 places in the rankings to 120th. Its overall score deteriorated by 7.9 per cent, reversing several years of gradual improvement. Two of the three GPI domains recorded deteriorations, with the *Safety and Security* domain recording the largest change. Seven indicators deteriorated, two improved, and 14 recorded no change.

The *Safety and Security* domain recorded the largest deterioration at 12.2 per cent. *Violent demonstrations* deteriorated by 44.4 per cent and *violent crime* by 32 per cent, reflecting a worsening domestic security environment in the lead-up to the March 2026 presidential election.[89] President Denis Sassou Nguesso, who has held power for a combined 40 years, stood for re-election in a contest marked by widespread allegations of unfair electoral practices, the boycott of major opposition parties, and a nationwide internet blackout on election day.[90]

In September 2025, the presidential security service launched Operation Zéro Kuluna, a crackdown on urban gang members known as 'kulunas', during which at least 10 people were reported to have been extrajudicially killed.[91] The *Political Terror Scale* deteriorated by 20 per cent, while *perceptions of criminality* worsened by 11.1 per cent. The *Militarisation* domain also deteriorated by seven per cent, driven by a 32.8 per cent deterioration in *UN peacekeeping funding* and a 6.6 per cent deterioration on the *military expenditure (% of GDP)* indicator.

The political opposition remains weakened by internal divisions and a lack of resources, and the kidnapping of opposition leader Lassy Mbouity in May 2025 further narrowed the space for political dissent.[92] The concentration of deteriorations across multiple *Safety and Security* indicators suggests a broader erosion of domestic security conditions rather than a single isolated event, and the country's trajectory will depend in large part on whether the post-election period brings a reduction in political tensions or a continuation of the current political environment.[93]

Pakistan

Rank: 152

Change in Score 2025-2026:	Change in Rank 2025-2026:
2.919	↓6

Pakistan recorded the fourth largest deterioration in peacefulness on the 2026 GPI, falling six places in the rankings to 152nd, its lowest ranking since 2017. Its overall score deteriorated by 5.5 per cent. Nine indicators improved, eight deteriorated, and six recorded no change. The *Ongoing Conflict* domain recorded a substantial deterioration of 17 per cent, while the *Safety and Security* and *Militarisation* domains both recorded marginal improvements.

The primary driver of the deterioration was a sharp rise in external and internal hostilities. The *deaths from external conflict* indicator deteriorated by 86.9 per cent, and Pakistan was involved in an intense four-day armed conflict with India in May 2025. Following an attack in Pahalgam, in Indian-administered Kashmir, that killed 26 civilians, India launched missile strikes on Pakistani territory on 7 May under Operation Sindoor. A ceasefire was announced on 10 May.[94] Pakistan's *neighbouring countries relations* indicator also deteriorated, with cross-border tensions further compounded by escalating clashes with Afghanistan. Pakistani airstrikes in Kabul and eastern Afghan cities in October 2025 targeted leaders of the Tehrik-i-Taliban Pakistan (TTP), prompting retaliatory attacks from the Afghan Taliban. A Qatar-brokered ceasefire in mid-October proved fragile, and hostilities reignited in February 2026.[95]

Internal security also deteriorated. The *deaths from internal conflict* and *internal conflicts fought* indicators both deteriorated by more than 10 per cent, reflecting sustained violence in Balochistan and Khyber Pakhtunkhwa, where armed groups, including the TTP, killed more than 200 people in 2025.[96] The *political instability* and *terrorism impact* indicators also deteriorated. However, Pakistan recorded improvements on several indicators. The *UN peacekeeping funding* indicator improved by 20.7 per cent, and the *violent demonstrations*, *violent crime*, *perceptions of criminality* and *homicide rate* indicators all recorded modest improvements. Despite these offsets, the scale of the deterioration on the *Ongoing Conflict* domain dominated Pakistan's overall position, placing it among the least peaceful countries in South Asia.

Tanzania

Rank: 98

Change in Score 2025-2026:	Change in Rank 2025-2026:
2.08	↓20

Tanzania experienced the fifth largest deterioration in peacefulness on the 2026 GPI, falling 20 places in the rankings to 98th. Its overall score deteriorated by 7.3 per cent, its largest single-year deterioration in the history of the Index. All three GPI domains recorded deteriorations, with the *Ongoing Conflict* domain recording the largest change. Seven indicators deteriorated, six improved, and 10 recorded no change.

The *Safety and Security* domain deteriorated by 4.1 per cent, with the *Political Terror Scale* worsening by 20 per cent and *political instability* by 15 per cent. The *Ongoing Conflict* domain deteriorated by 15.2 per cent, driven by a 78.3 per cent deterioration in *deaths from internal conflict* and a 20 per cent deterioration in *intensity of internal conflict*.

The primary driver of the deterioration was the disputed October 2025 general election and the violent crackdown that followed. Incumbent President Samia Suluhu Hassan was declared re-elected with over 97 per cent of the vote in a contest that the African Union Election Observer Mission concluded did not comply with AU standards for democratic elections. Widespread protests erupted across the country, with demonstrators denouncing the result as fraudulent. Security forces responded with live ammunition, with reports estimating that hundreds of people may have been killed nationwide.[97] The government subsequently banned all protests, characterised the unrest as an attempted coup, and charged at least 240 people with treason.[98] The United States announced a comprehensive review of its bilateral relationship with Tanzania in response to the violence.[99]

Despite the overall deterioration, Tanzania recorded improvements on six indicators. *Terrorism impact* improved by 21.2 per cent, while *perceptions of criminality* improved by 7.8 per cent, suggesting that some aspects of day-to-day safety continued to improve even as political violence escalated. Minor improvements were also recorded on the *homicide rate*, *police rate*, *armed services personnel rate*, and *weapons imports*. However, the scale of the election-related violence and the government's response represent a significant setback for a country that had been considered one of the more stable nations in East Africa.

Peace has deteriorated every year since 2014. Over this period, 113 countries deteriorated and only 49 improved in peacefulness. Forty-nine per cent of the improvements occurred in two regions: Western and Central Europe, and Eastern Europe and Central Asia.

25 Most Peaceful Countries	25 Least Peaceful Countries
0.3%↓	18.9%↓

The gap between the most and least peaceful countries continues to grow, with 'peace inequality' widening by 11.7 per cent in the past two decades. The 25 most peaceful countries deteriorated by 0.3 per cent, while the least peaceful deteriorated by 18.9 per cent.

Two of the three GPI domains have deteriorated since 2008, with *Ongoing Conflict* and *Safety and Security* deteriorating by 18.5 per cent and 3.2 per cent, respectively. Only the *Militarisation* domain had a marginal improvement.

Ongoing Conflict	Safety & Security
18.5↓	3.2↓

Though the *Militarisation* domain has improved since 2008, that trend has reversed over the last three years, as many countries respond to an increasing number of conflicts and rising geopolitical uncertainty. The largest increases have been in Western and Central Europe.

Although the *Safety and Security* domain deteriorated, key measures of criminality have shown sustained improvement, most notably the *homicide rate* and *perceptions of criminality* indicators.

The three indicators with the largest deterioration since 2008 are *violent demonstrations, internal conflicts fought*, and *external conflicts fought*.

Deaths from internal conflict have increased more than sixfold since 2008, peaking in 2023 at more than 309,000. The number of countries recording at least 1,000 internal conflict deaths in a single year has grown from eight in 2008 to 20 in 2024.

There have been three key geopolitical periods over the past 50 years: The Cold War, the rapid globalisation that began in the 1990s, and now the 'Great Fragmentation', which began at the start of the Global Financial Crisis.

The geopolitical influence of European great powers is declining, most notably in the economic sphere. Between 1995 and 2023, Germany's share of global GDP fell by 49 per cent, France by 44 per cent, Italy by 42 per cent, and the United Kingdom by 27 per cent.

Middle powers are filling the gap left by declining European influence. The rising middle powers, including the United Arab Emirates, Indonesia, Türkiye, and Mexico, are less likely to be as closely aligned to the United States as existing middle powers like Australia.

Geopolitical risks exceed levels of the Cold War, driven by heightened military spending, the diminished role of multilateral institutions, the tripling of trade restrictions and increasing competition among major and middle powers.

117 million

The *refugees and IDPs* indicator has deteriorated every year since 2019, deteriorating in six of the eight GPI regions. There were 117 million people forcibly displaced globally as of 2025.

The impact of technological warfare is reflected in the decreases in the average armed forces personnel rate, which fell from 638 per 100,000 people in 2008 to 518 per 100,000 people in 2026.

2 Trends

GPI Trends

The world is considerably less peaceful now than it was in 2008, with the average level of country peacefulness deteriorating by 6.5 per cent between 2008 and 2026.

This has been driven by a sustained deterioration in a number of indicators, most notably *deaths from internal conflict, internal conflict fought,* and *external conflicts fought.* Underpinning the changes has been a fragmentation of the international system, which has accelerated rapidly over the past two decades. Over that same period, 119 countries have become less peaceful, compared to 42 that have improved.

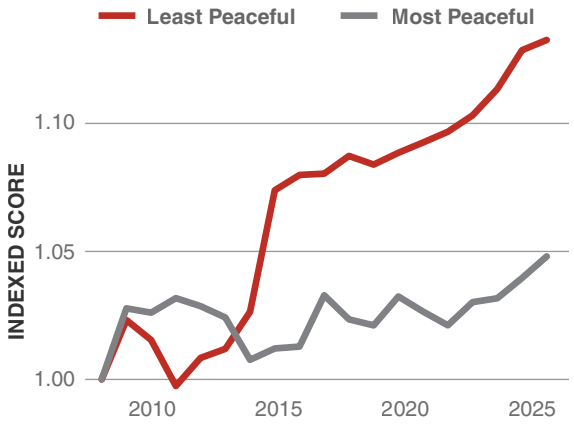
Figure 2.1 highlights the overall trend in peacefulness from 2008 to 2026, as well as the year-on-year percentage changes in score. Peacefulness has declined year-on-year for 15 of the last 18 years. The deterioration in peacefulness since 2008 was largely concentrated in four regions: sub-Saharan Africa, the Middle East and North Africa (MENA), North and Central America, and South America.

The gap in peace between the most and least peaceful countries has widened considerably in the past decade, as shown in Figure 2.2. Between 2008 and 2026, the average score for the 25 least peaceful countries deteriorated by 18.9 per cent, while the average level of peacefulness for the 25 most peaceful countries deteriorated by just 0.3 per cent. Driving this divergent pattern has been the uptick in conflict. When countries fall into conflict their scores deteriorate quickly, whereas peacefulness tends to improve slowly. No country has ever moved from the least to the most peaceful quartile in the history of the Index. Countries like Burkina Faso are strong examples of this phenomenon. In 2014 it was ranked as the 35th most peaceful country in the world. However, in just over a decade it has fallen 114 places in the rankings to now be ranked the 149th most peaceful country in the world.

FIGURE 2.2

Indexed trend in peace for the most and least peaceful countries, 2008–2026

The most peaceful countries are now less peaceful than they were in 2008.



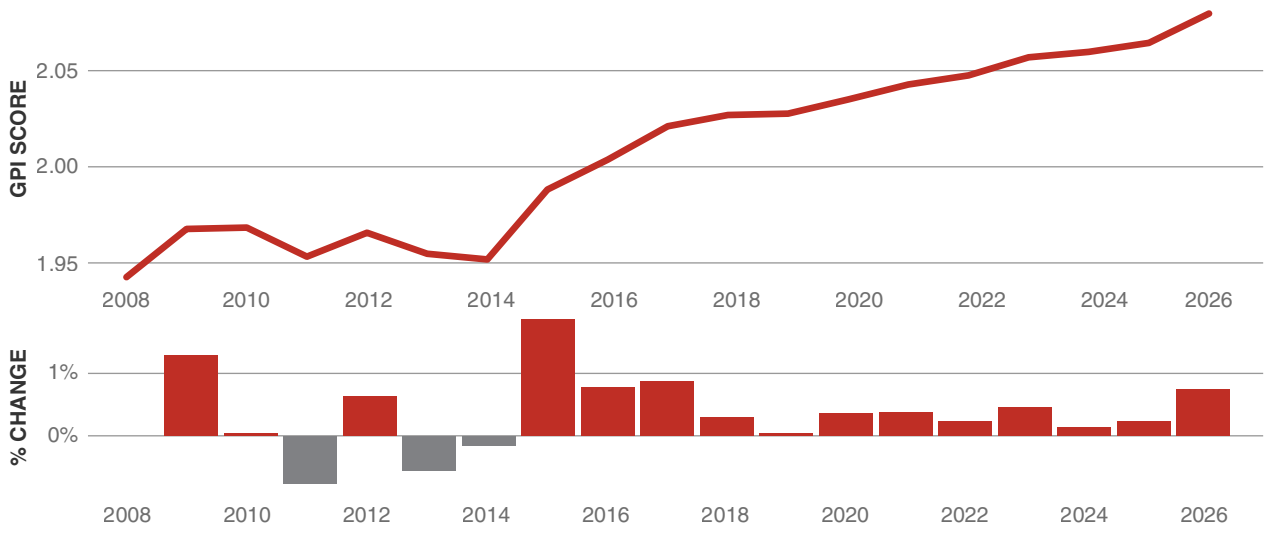
Source: IEP Calculations

Despite the global deterioration, the past 12 years have also produced notable country-level improvements. Since 2014, 49 countries have become more peaceful while 113 have deteriorated. Domain-level progress has been uneven: 84 countries have improved on *Militarisation*, 60 on *Safety and Security*, and just 41 on *Ongoing Conflict*.

FIGURE 2.1

GPI overall trend and year-on-year percentage change, 2008–2026

Peacefulness has declined year-on-year for 15 of the last 18 years.



Source: IEP

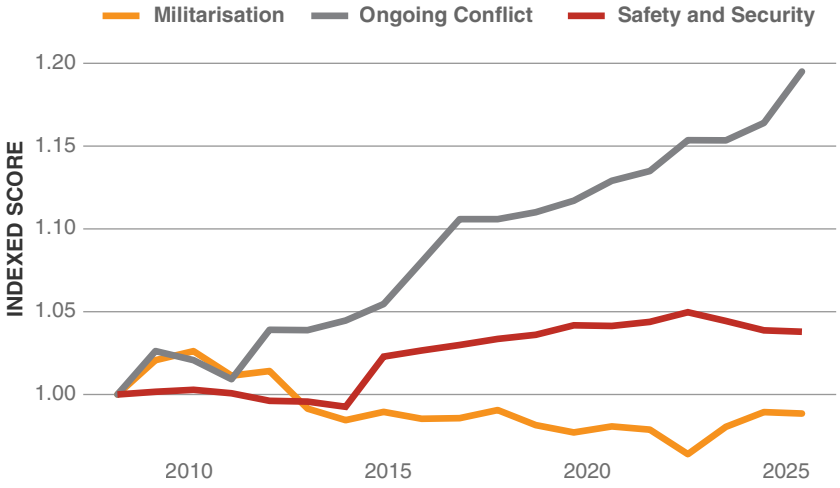
Domain Trends

The GPI measures peacefulness across three domains: *Safety and Security*, *Ongoing Conflict*, and *Militarisation*. Figure 2.3 highlights the indexed trend across these three domains over the past 18 years.

FIGURE 2.3

Indexed trend in peace by GPI domain, 2008–2026

The *Ongoing Conflict* domain has deteriorated by 18.5 per cent since 2008.



Source: IEP

Since 2022, *Militarisation* has been on the rise. The deterioration of the *Militarisation* domain can be attributed to an increase in military spending by multiple countries in the face of mounting geopolitical tensions, most notably following the Russian invasion of Ukraine.

While the world has become less peaceful since 2008, there have been some notable improvements in some areas. The average country score on the *Militarisation* domain has improved by 1.3 per cent, with the largest improvements recorded on the *UN peacekeeping funding* and *armed services personnel rate* indicators. However, the other two GPI domains recorded deteriorations over this same period. The *Safety and Security* domain deteriorated by 3.2 per cent, while the *Ongoing Conflict* domain deteriorated by 18.5 per cent. This is a substantial deterioration.

Over the last 18 years, the *Militarisation* domain has improved even as *Ongoing Conflict* has surged. Nevertheless, four of the six indicators on the *Militarisation* domain have deteriorated since 2008, including *nuclear and heavy weapons*, which deteriorated by 16.2 per cent over the period.

Since 2022, *Militarisation* has been on the rise. The deterioration of the *Militarisation* domain can be attributed to an increase in military spending by multiple countries in the face of mounting geopolitical tensions, most notably following the Russian invasion of Ukraine. At the June 2025 NATO Summit in The Hague, NATO members agreed on a new target of investing five per cent of GDP annually in defence and security by 2035, split between 3.5 per cent for core defence and 1.5 per cent for related spending. All NATO allies now meet the previous two per cent target, compared to only three members in 2014.[1] As defence budgets expand, funds are increasingly being dedicated to heavy weapons and advanced military capabilities. This trend is unlikely to reverse soon due to the increasing level of conflict and the fragmentation of global power.

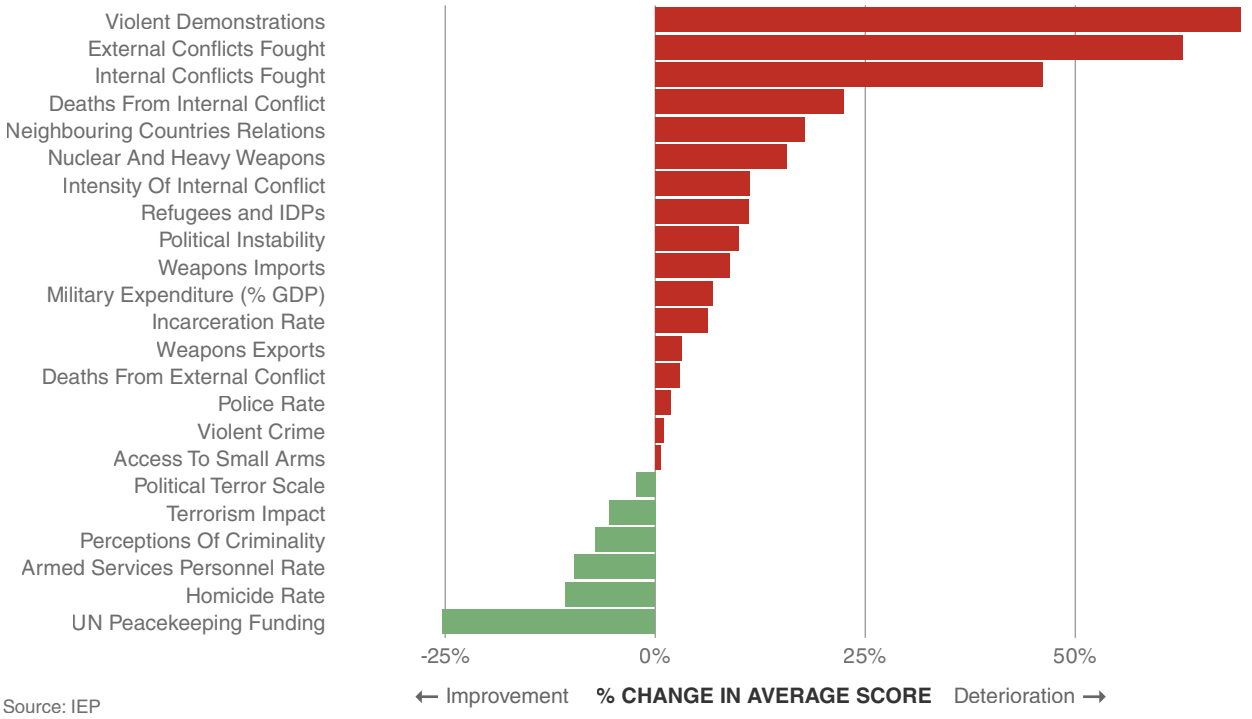
Figure 2.4 shows the average percentage change in score for each of the 23 GPI indicators from 2008 to 2026. Over this period, 17 indicators recorded deteriorations while six recorded improvements. The largest deteriorations were recorded on the *violent demonstrations*, *external conflicts fought,* and *internal conflicts fought* indicators, which deteriorated by 68.3, 63.5 and 44.7 per cent, respectively. These changes reflect that the number of active conflicts around the world has surged, with a concurrent increase in involvement by external actors.

The largest improvement was in the *UN peacekeeping funding* indicator. However, this masks changes in the UN budget settings. As there was a reduced number of peacekeeping operations, the amounts of money required of countries dropped, which made it easier for countries to meet their dues. Geopolitical fragmentation made it harder for countries such as the United States, Russia, and China to agree on peacekeeping missions.

FIGURE 2.4

Percentage change by GPI indicator, 2008–2026

Between 2008 and 2026, the number of GPI indicators that deteriorated was more than double the number that improved.



Source: IEP

A further three indicators deteriorated by more than 15 per cent: *deaths from internal conflict*, *neighbouring countries relations,* and *nuclear and heavy weapons*. In total, seven GPI indicators deteriorated by more than 10 per cent over the period.

Global *deaths from internal conflict* have risen more than sixfold over the period, from around 29,000 in 2008 to over 181,000 in 2026, with a peak of more than 309,000 deaths in 2023. The number of countries recording at least 1,000 internal conflict deaths in a single year has grown from eight in 2008 to 20 in 2026.

The number of countries scoring four or above on the indicator, denoting hostile relations with at least one neighbour, has more than doubled, from 17 in 2008 to 38 in 2026. The Gulf states have moved especially sharply, with Oman, Qatar, the United Arab Emirates, and Bahrain all among the indicator's largest long-run deteriorations.

The five largest country-level deteriorations on *nuclear and heavy weapons* since 2008 are all middle powers in regions of acute geopolitical strain. Japan, South Korea, Türkiye, Taiwan, and Egypt have each moved up several bands on the indicator, pointing to an underlying shift in regional balances, rather than expansion at the top of the great-power tier.

Of the six GPI indicators that recorded an improvement since 2008, only *UN peacekeeping funding* recorded a very large change, improving by 25 per cent. Three other indicators recorded improvements of more than five per cent: the *homicide rate*, the *armed services personnel rate*, and *perceptions of criminality*.

Safety and Security

The *Safety and Security* domain deteriorated by 3.2 per cent between 2008 and 2026. Of the 11 indicators on this domain, seven deteriorated and four improved. The largest deterioration occurred on the *violent demonstrations* indicator, with 113 countries and every GPI region recording overall deteriorations. Average scores on this indicator deteriorated by 68.3 per cent globally.

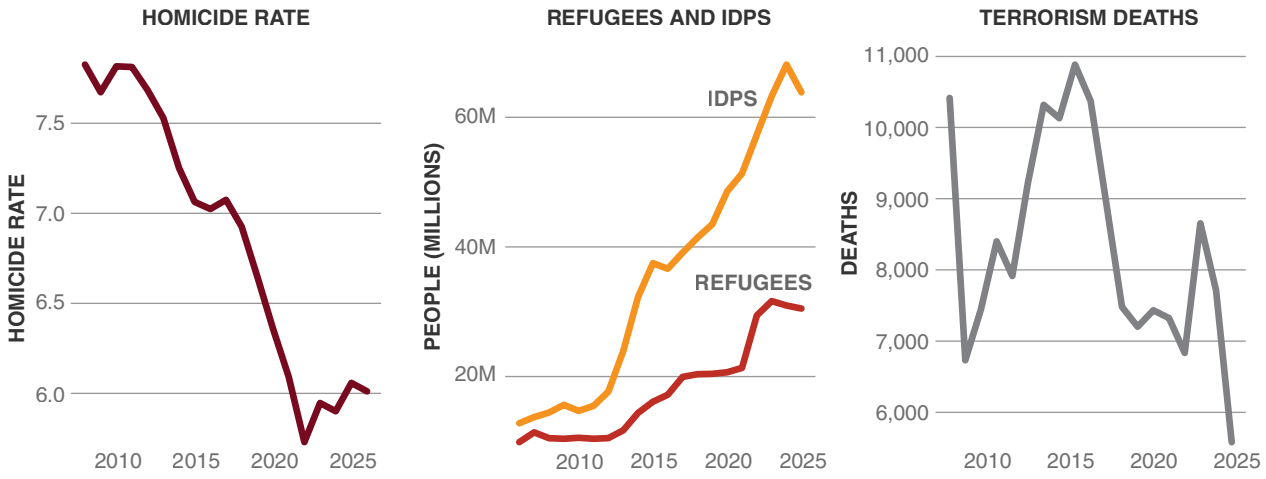
The rise in violent demonstrations over the past decade reflects a mix of economic hardship, political frustration, and weakening trust in governments. The 2008 Global Financial Crisis and the austerity cuts that followed pushed many people to protest, first over economic grievances and later over deeper anger at how their governments were performing. Rising corruption, falling living standards, and a sense that elected leaders were failing to deliver, exacerbated social grievances. Just over a decade later, the COVID-19 pandemic made things sharply worse. Violence tends to escalate where governments respond with force and where institutions are already fragile, while social media has made it easier and faster to mobilise large protests. The specific triggers vary from country to country, but they often involve disputed elections, leaders trying to hold onto power, sudden price hikes, pressure on living standards, or basic failures in services and security.

Figure 2.5 highlights the trend from 2008 to 2026 for three key *Safety and Security* indicators. The *refugees and IDPs* indicator has deteriorated in the GPI every year since 2019, and long-run scores on the indicator have deteriorated in six of the eight GPI regions. As of the end of 2024, there were 123.2 million people who had been forcibly displaced globally, the highest on record, equivalent to one in every 67 people on Earth. This headline total fell slightly in the first half of 2025, to 117.3 million by June 2025, as more than half a million Syrians returned home in the first six months of the year, the first decline in global displacement in over a decade.[2]

FIGURE 2.5

Trends in key *Safety and Security* indicators, 2008–2026

The *homicide rate* was the only indicator of the *Safety and Security* domain that recorded a marked improvement.



Source: UNODC, UNHCR, Dragonfly TerrorismTracker

The *homicide rate* was the largest improver within the *Safety and Security* domain, with scores on this indicator improving in 123 countries since 2008. The global average *homicide rate* fell from 7.8 to 6.0 per 100,000 people over the period, and the number of countries with a homicide rate below one per 100,000 rose from 16 to 39. At the same time, the number of countries with a rate below two homicides per 100,000 rose from 48 to 65. The largest improvements were recorded in Eastern Europe and Central Asia, at 30.7 per cent on average, followed by Western and Central Europe at 21.3 per cent, and Asia-Pacific, at 13.6 per cent. However, average *homicide rate* scores deteriorated slightly in North and Central America and in South America over the period.

Scores on the *perceptions of criminality* indicator are correlated closely with the *homicide rate.* Like the *homicide rate,* the global *perceptions of criminality* score has also improved since 2008, with a total of 104 countries recording improvements. The largest country-level improvement was recorded by Lithuania, whose score fell by 57 per cent, reflecting a substantial drop in the share of the population reporting that they feel unsafe. The largest deterioration was in Myanmar, where the score rose by more than 155 per cent since 2008, reflecting the deterioration in policing capacity caused by the civil war that began in 2021.

Terrorism remains a significant driver of unrest in certain regions. Even though global *terrorism impact* scores improved by 5.7 per cent since 2008 and deaths from terrorism have fallen from their mid-2010s peak, the epicentre of global terrorism has shifted decisively toward sub-Saharan Africa. The central Sahel, comprising Burkina Faso, Mali, and Niger accounted for nearly half of global terrorism deaths in 2025, and terrorism-related deaths in the Sahel have risen nearly tenfold since 2019.[3] Long-run *terrorism impact* scores have improved in every GPI region other than sub-Saharan Africa, where the regional average has deteriorated by 14.1 per cent since 2008. However, terrorism in Western countries has increased substantially in the last two years, driven by rising political polarisation and rising antisemitism.

Ongoing Conflict

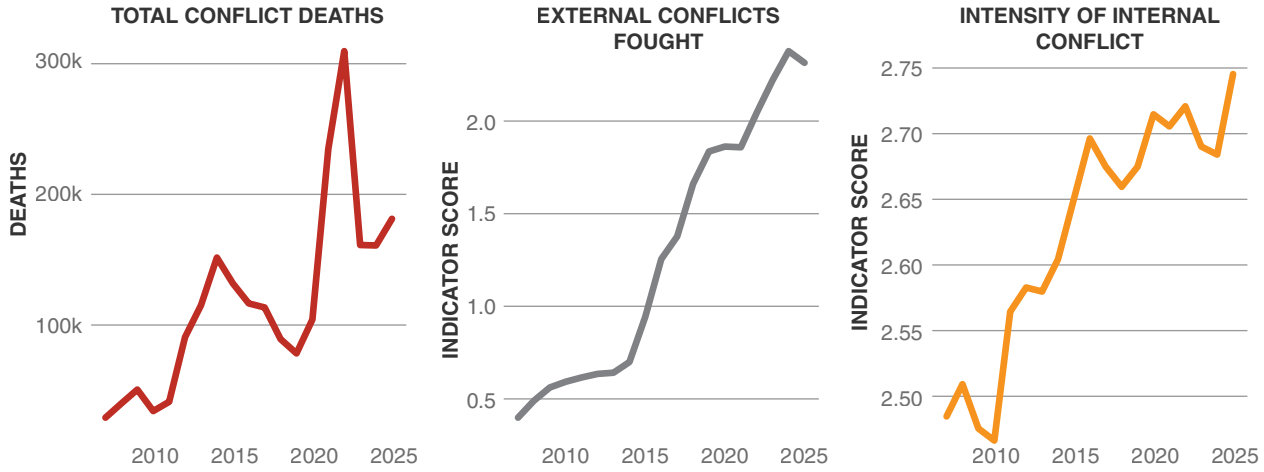
Ongoing Conflict recorded the largest fall in peacefulness of the three GPI domains, deteriorating by 18.5 per cent between the 2008 GPI and the 2026 GPI. Every one of the six indicators on the domain deteriorated over this period, with the largest deterioration recorded on the *external conflicts fought* indicator, which rose by 63.5 per cent. In total, 128 countries recorded a deterioration on this domain, with 32 recording an improvement and one registering no change since 2008.

Figure 2.6 highlights the trend from 2008 to 2026 for three key *Ongoing Conflict* indicators: total conflict-related deaths, the average *external conflicts fought* score, and the average *intensity of internal conflict* score.

FIGURE 2.6

Trends in key *Ongoing Conflict* indicators, 2008–2026

There were over 300,000 deaths from conflict in 2023.



Source: UCDP, EIU, IEP Calculations

Conflict-related deaths have risen sharply over the period. The total number of conflict-related deaths in the most recent year was over 181,000, down from the 2023 peak of over 309,000 which was predominately due to the conflicts in Ukraine and Ethiopia. Conflict deaths have increased by more than 530 per cent since 2008, when fewer than 29,000 were recorded. The most recent death tolls have been driven in large part by the wars in Ukraine, Gaza, Sudan, and the aftermath of the Tigray conflict in Ethiopia.[4] There were an estimated 84,000 conflict deaths in Ukraine in 2025. Sudan recorded over 16,000 confirmed conflict deaths in the past year, although some estimates suggest that there may have been hundreds of thousands of deaths in the past few years.[5] In total, there were 20 countries with more than 1,000 conflict deaths in the past year, the highest number since the inception of the Index.

The *external conflicts fought* indicator has deteriorated in 87 countries since 2008, with 34 improving and 40 recording no change. Every GPI region recorded a deterioration on the indicator, with the largest increases in sub-Saharan Africa, South Asia, and the Middle East and North Africa.

The rise of *external conflicts fought* reflects the growing involvement of external actors in what were once predominantly internal conflicts. In the five years prior to the 2026 GPI, 103 countries were at least partially involved in an external conflict, compared to 59 in 2003–2008. This broadening of conflict has been accompanied by the growth of larger coalitions of external actors and proxy forces operating across multiple theatres at once. The countries engaged in the most conflicts are the United States, Niger, France, Kenya, and Chad, all of which were involved in eight or more external conflicts between 2020 and 2024.

Intensity of internal conflict has also deteriorated, with the average global score rising by 10.5 per cent since 2008. The number of countries scoring three or higher on this indicator, the threshold for the explicit use or threat of violence, rose from 49 in 2008 to 57 in the 2026 GPI, while the number scoring four or higher rose from 16 to 27. In total, 67 countries deteriorated on this indicator, while 28 improved.

Militarisation

The average score on the *Militarisation* domain improved by 1.3 per cent between 2008 and 2026. It is the only GPI domain to record an improvement during this period, with 94 countries improving and 67 deteriorating. However, it has deteriorated since 2022 and is likely to continue deteriorating in the near future. Figure 2.7 shows the trends for the average *armed services personnel rate*, *military expenditure (% of GDP)*, and the average *weapons imports* indicator score.

The impact of technological warfare is reflected in the decreases in the average *armed forces personnel rate*, which fell from 638 per 100,000 people in 2008 to 518 per 100,000 people in 2026. For example, the Ukrainian armed forces reported that of the 35,000 Russian casualties recorded in March 2026, 96 per cent were caused by drones.

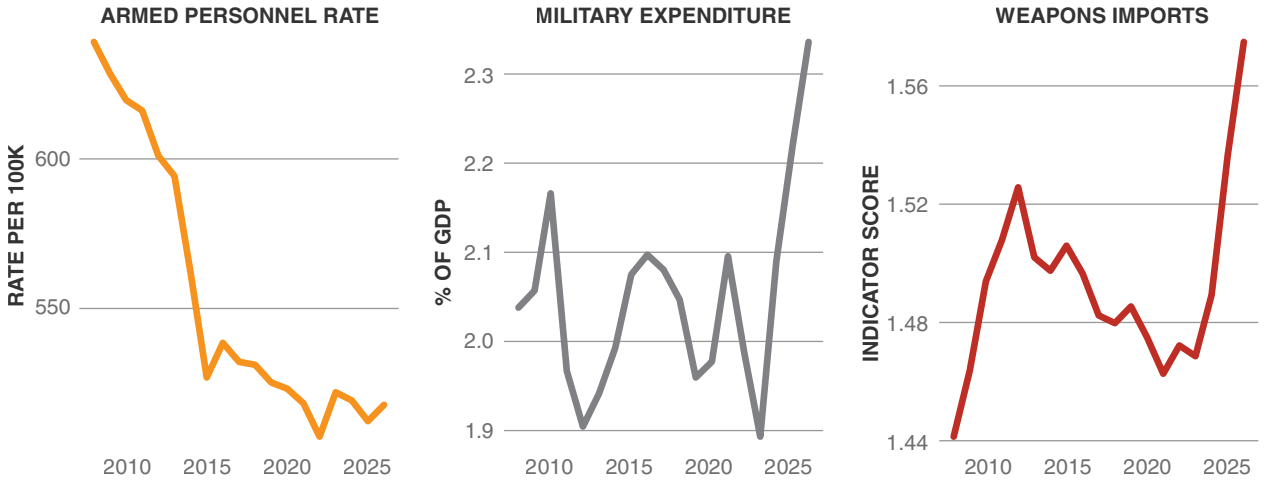
Of the six indicators on the *Militarisation* domain, two have improved and four have deteriorated since 2008. The largest improvement was recorded on the *UN peacekeeping funding* indicator, which improved by 25 per cent, as 120 countries moved closer to meeting their assessed contributions. The *armed services personnel rate* improved by 10.6 per cent on average, with 121 countries recording a reduction over the period. All other indicators recorded deteriorations.

The improvements on the *armed services personnel rate* and, to a lesser extent, *military expenditure (% of GDP)* indicators have been uneven across the largest militaries. Among the five largest military spenders (the United States, China, Russia, Germany, and the United Kingdom), all recorded reductions on their *armed services personnel rate* over the period, though only the US and the UK recorded improvements on *military expenditure (% of GDP)*. Russia's military expenditure rose from 2.4 per cent of GDP in 2008 to 6.3 per cent in the 2026 GPI, while Germany's rose from 1.1 to 2.1 per cent as part of the wider European rearmament effort.

FIGURE 2.7

Trends in key *Militarisation* indicators, 2008–2026

The average *armed personnel rate* has fallen from over 630 to less than 520 per 100,000 people.



Source: UCDP, EIU, IEP Calculations

The *weapons imports* indicator has deteriorated by 9.4 per cent on average since 2008, with 91 countries deteriorating and 60 improving. The number of countries recording zero weapons imports fell from 27 in 2008 to 14 in the 2026 GPI. Countries in the Middle East and North Africa continue to dominate the top of the per-capita importer rankings, representing three of the top 10 per-capita importers on the 2026 GPI.

The *weapons exports* indicator has changed only modestly over the long run, with a 3.4 per cent deterioration on average. In total, 98 countries registered no weapons exports at all in the 2026 GPI. Six of the 10 largest per-capita exporters are Western democracies, reflecting the continued concentration of the global arms export market in a small number of advanced economies.

Looking ahead, the *Militarisation* domain is likely to continue deteriorating in the short to medium term. At the 2025 NATO Summit in The Hague, NATO members committed to raising defence spending to five per cent of GDP by 2035, a sharp increase from the previous two per cent target. The European Commission's ReArm Europe Plan, announced in March 2025, seeks to mobilise up to €800 billion for European defence investment.[6] The combination of these commitments, alongside ongoing rearmament in Russia, continued defence budget growth in China and India, and the proliferation of advanced and heavy weapons systems globally, suggests that the recent deterioration of the *Militarisation* domain is likely to persist.

Geopolitical Trends: The rise of the middle powers

Introduction

The international system is undergoing a structural transformation. While attention often focuses on the rivalry between the US and China, a broader shift is occurring: a significant expansion in the number and influence of middle power nations. Since the end of the Cold War, the number of middle power countries has nearly doubled, from nine in 1991 to 16 in 2024, while the number of emerging powers has tripled over the same period. This expansion is not merely numerical. It represents a fundamental redistribution of global influence away from the traditional great powers of Europe and towards a more diverse set of actors in the Middle East, the Asia-Pacific region, and Latin America. The share of global GDP of the European great powers has shrunk dramatically since 1991.

This shift has taken place against a backdrop of rising geopolitical fragmentation. Global peacefulness has deteriorated in 15 of the last 18 years. Military spending reached a record US$2.9 trillion in 2025. The number of active conflicts is at its highest level since the end of the Second World War and multilateral institutions, from the UN Security Council to the World Trade Organization, have become increasingly gridlocked.

The influence of rising middle powers extends far beyond traditional security considerations. Countries like Indonesia, Türkiye, Saudi Arabia, the United Arab Emirates, and Brazil are increasingly shaping global trade flows, development finance, cultural narratives, military and diplomatic support, and international institutions.

This transformation is not a wholesale rejection of the existing order, but a pragmatic recalibration towards greater autonomy and influence. Trade between developing nations has more than doubled over the past two decades, now representing nearly a quarter of global commerce.[7] Alternative development financing has grown substantially, with Gulf sovereign wealth funds deploying tens of billions annually across Africa, Asia, and beyond, and new institutions like the New Development Bank and the Asian Infrastructure Investment Bank offering alternatives to the World Bank and the IMF, with fewer political conditions attached. The practical effect is clear: developing countries now have more financing options and more room for manoeuvre than at any point in the post-war era.

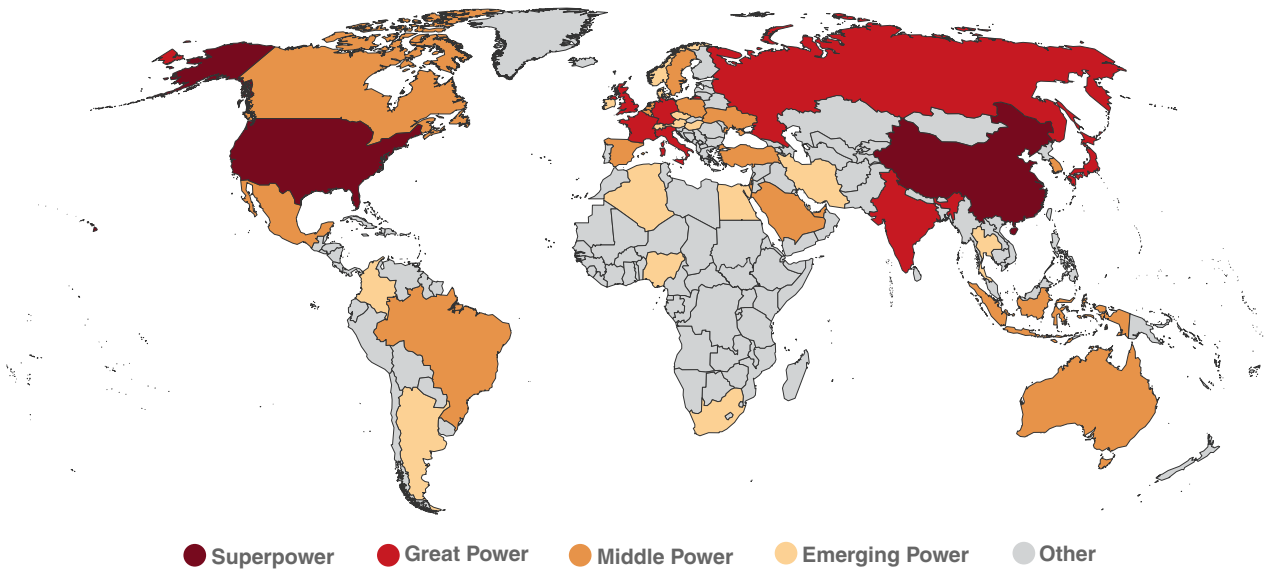
Measuring state power

IEP classifies countries into power groupings using a hybrid methodology that assesses three dimensions: economic capacity (nominal GDP in constant 2015 USD), military capability (total military expenditure), and relational influence (bilateral influence from the Pardee Institute's Formal Bilateral Influence Capacity dataset). Countries meeting the threshold in all three indicators are classified as superpowers, great powers, or middle powers. This approach captures both the capabilities states possess and how they engage with others. The resulting classification identifies two superpowers (the US and China), seven great powers (France, Germany, India, Italy, Japan, Russia, and the UK), 16 middle powers, and 17 emerging powers, as shown in Figure 2.8.

FIGURE 2.8

World map of countries by power grouping, 2023

Sub-Saharan Africa has the lowest concentration of powerful countries.



Source: IEP Analysis

The Great Fragmentation

There have been three key phases in geopolitical relations over the past 50 years, as shown in Figure 2.9. The first was the stable division of power between Cold War blocs from 1975 to 1990. The second was a period of rapid integration from the early 1990s to the mid-2000s, when global trade and cooperation expanded significantly. The third, which IEP terms 'The Great Fragmentation', began after the 2008 Global Financial Crisis and has intensified in recent years.[8]

This latest phase was not caused by a collapse of international institutions, but by a steady accumulation of frictions. These include the increasing use of tariffs, export bans, and investment restrictions, as well as new migration and capital controls. Sanctions have become more common and longer lasting, particularly those imposed by Western countries in response to geopolitical disputes. Voting patterns in the UN General Assembly show growing disagreement between Western countries and China and Russia on key global issues, reflecting a widening divergence in how different regions view the rules and responsibilities of the international system.

The underlying causes are both political and structural: the return of rival power competition, the rise of nationalism, disputes over control of new technologies and natural resources, and the weakening of global institutions like the UN and WTO. There has also been a weakening of some regional bodies, with the withdrawal of the United Arab Emirates from OPEC being the latest example. Countries are increasingly relying on national or regional strategies rather than working through global systems. What sets this period apart is how broad and long-lasting these changes are. The global geopolitical and economic system may be approaching a tipping point and, if passed, it is difficult to predict what the new system would look like.

Trade and economic fragmentation

The global economy is significantly more interconnected than during the Cold War, but the extent of this interdependence has begun to plateau. Trade as a percentage of GDP rose from under 40 per cent at the end of the Cold War to over 60 per cent by the mid-2000s, then levelled off. It has remained at or below 60 per cent since the Global Financial Crisis. The use of trade-restrictive measures surged globally, with around 3,000 such measures imposed in 2023, nearly triple the number from 2019. Commodity markets show clear signs of fragmentation, with widening price differentials for key materials like lithium and coal across different geographic markets.[9]

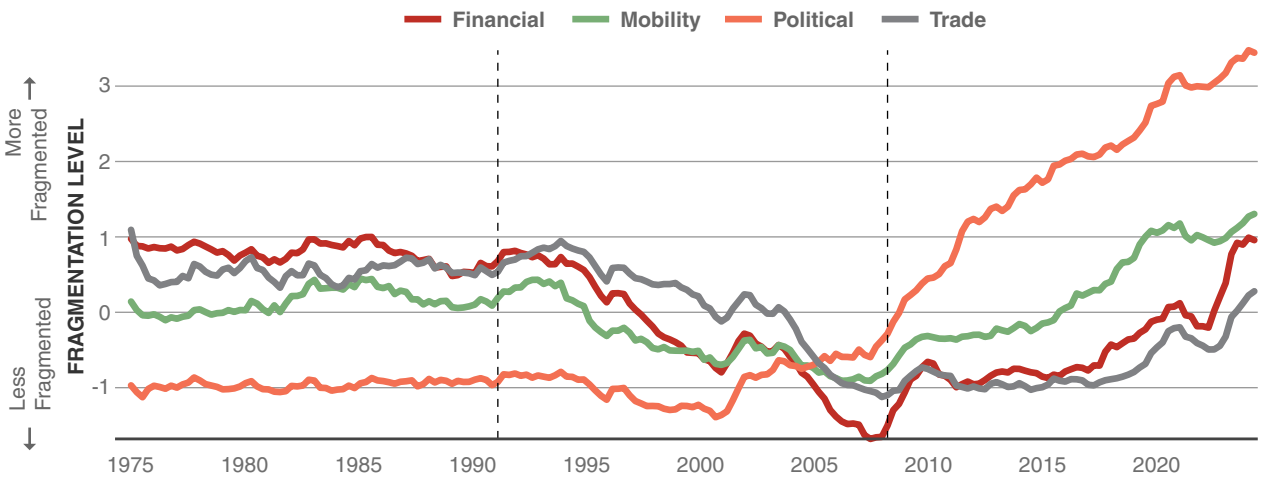
This economic interdependence is increasingly becoming a source of geopolitical tension. The China-US tariff war that began in 2018, restrictions on exports of rare earth metals, and the extensive sanctions imposed on Russia following its invasion of Ukraine have solidified the perception that economic dependencies are vulnerabilities that can be strategically exploited. Heightened national security concerns, amplified by supply chain disruptions during the COVID-19 pandemic, have prompted governments to prioritise resilience and security of supply. This has spurred interest in reshoring, near-shoring, and 'friend-shoring', relocating economic activities to geopolitically aligned partner countries.[10] The 2026 Iran war highlights international dependencies far beyond oil and its byproducts such as fertilisers, plastics, synthetic rubber, and pharmaceuticals. Some of these other dependencies include trading routes, domestic inflation, air travel disruption, and food scarcity. This only adds to feelings of vulnerability and heightening national security.

Financial flows are also exhibiting increased sensitivity to geopolitical risk, with some evidence of capital reallocation towards countries perceived as geopolitically closer or as safe havens. The declining share of the US dollar in global reserves and widespread exploration of Central Bank Digital Currencies could further fragment the international payments system. Estimates of long-term global GDP losses from fragmentation vary widely, from 0.2 per cent to nearly seven per cent, with emerging markets and low-income countries considered the most vulnerable.[11]

FIGURE 2.9

Geopolitical fragmentation, 1975–2024

Fragmentation has skyrocketed since 2008, particularly in the political sphere.



Source: Geopolitical Fragmentation Index

Rising militarisation

The fragmentation has been paralleled by a sharp increase in militarisation, particularly since 2022. The 9.4 per cent increase in global military spending during 2024 was the steepest year-on-year rise since at least 1988, and it was followed by a 2.9 per rise in 2025.[12] Military spending per capita reached US$352 in 2025, its highest level since 1990.[13] All 15 of the world's largest military spenders increased their expenditure.

The growth has been fuelled primarily by European countries responding to the Russia–Ukraine war, alongside increases across the Middle East and Asia-Pacific. It is important to note, however, that the average level of country militarisation had been declining for 15 years prior to the Russian invasion of Ukraine. The massive recent increases have been driven by a relatively small number of countries.

Meanwhile, nuclear disarmament has stagnated. Every nuclear-armed state has either maintained or increased its arsenal in the past three years. China added 100 warheads in 2024, bringing its total to 600, and is projected to increase by 60 to 80 warheads annually. The era of bilateral nuclear arms control between the US and Russia is effectively over.

This phase of militarisation is characterised by important qualitative shifts. Despite record spending, total military personnel worldwide has declined, reflecting a move towards more capital-intensive, technologically advanced forces. Investment is increasingly channelled into AI, autonomous systems, cyber warfare, space-based assets, and advanced missile technology. When taking increased military sophistication into account, IEP estimates a 10 per cent increase in global military capability over the last decade, despite reductions in armed forces personnel rates.

Growing competition for influence

Geopolitical fragmentation can also be seen in increasing competition for influence, particularly in the developing world, as shown in Figure 2.10. Bilateral influence data shows that in 1991 the US was the world's only superpower, with significant influence in almost every region. By 2023, China had risen to superpower status, Russia had recovered much of its influence lost during the break-up of the Soviet Union, and new middle powers like the United Arab Emirates, Türkiye, and South Korea were playing much larger roles in their respective regions.

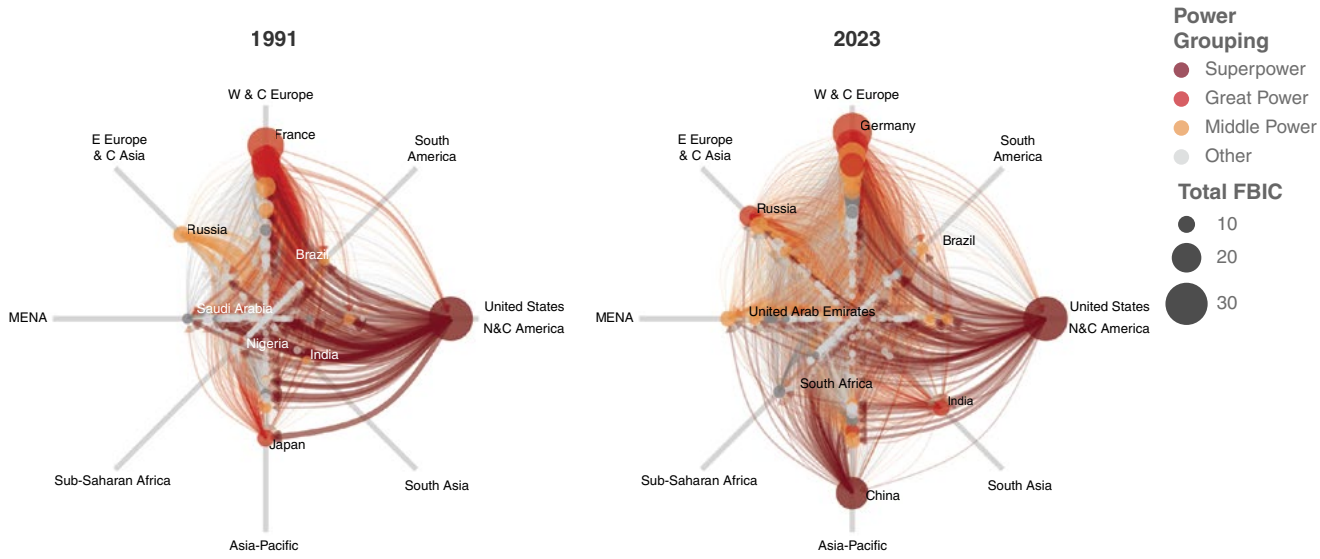
The increase in fragmentation has not meant fewer interactions between countries, but rather a much denser web of relations across regions, with the US and traditional European great powers having relatively less influence than at the end of the Cold War.

Most of this increase in influence has occurred in the developing world. Competition revolves around access to key resources, strategic positioning, and the ability to influence neighbouring countries. In some cases, this competition manifests through interventions in civil conflicts. Between 2010 and 2023, the number of internationalised intrastate conflicts nearly tripled. By 2024, 66 countries were involved in at least one internationalised intrastate conflict, up from 59 in 2008.[14] Many of these conflicts involve large regional or international coalitions, and the involvement of external actors can intensify conflict and hinder resolution. This can be seen in the civil war in Sudan, where external actors including China, Russia, Iran, Egypt, the United Arab Emirates, Chad, and Libya, support rival factions.

FIGURE 2.10

Bilateral geopolitical influence, 1991 vs 2023

Many more countries now exert significant influence globally.



Source: FBIC, IEP

The Superpower Plateau

The United States and China remain the world's only superpowers, with clear advantages in economic strength, military capability, and geopolitical influence. Almost every country in the world is significantly influenced by one or both, as shown in Figure 2.11. However, there are signs that their geopolitical influence is beginning to plateau.

The US was the world's only superpower at the end of the Cold War, with a significantly higher bilateral influence score than any other country. However, its total score has increased very little since 1991, with a noticeable plateau between 2005 and 2016. The number of countries in which it wields significant influence has not increased since 2015. China's bilateral influence rose rapidly between 2000 and 2015 but has slowed over the past five years. Both countries may have reached a limit to their spheres of influence, with China dominating in sub-Saharan Africa, the US remaining most influential in Europe, and both competing for influence in South America and the Middle East.

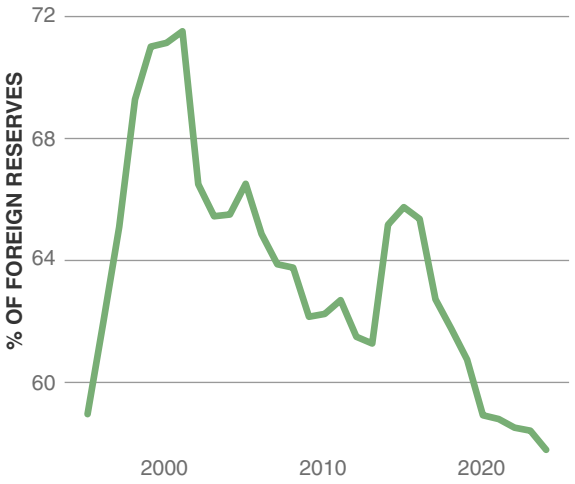
United States

The US remains the world's largest economy and most diplomatically influential nation, but several indicators suggest its relative influence is stalling. Foreign Direct Investment (FDI) inflows in 2024 were only US$292 billion, weaker than the previous decade's average, falling another one per cent in 2025 to $288 billion.[15] The US dollar's share of global foreign exchange reserves has fallen from nearly 72 per cent at the turn of the century to under 60 per cent, as shown in Figure 2.12. BRICS countries have been increasingly signing agreements to trade in local currencies.[16]

FIGURE 2.12

Percentage of foreign exchange reserves held in US dollars, 1995–2024

The US dollar now accounts for less than 60 per cent of global foreign exchange reserves.



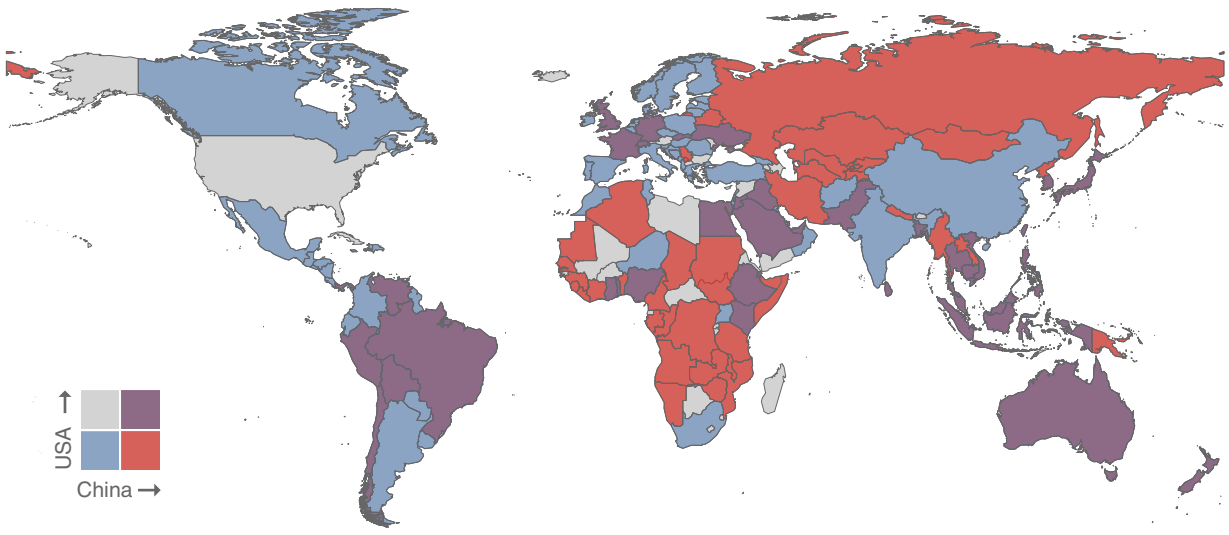
Source: IMF: COFER Database

The plateau in influence is reflected in changes in how people in other countries view the US. According to Pew's 2025 global survey, although people in most surveyed countries see the US as their most important ally, many Europeans and Latin Americans also name it as the greatest threat to their country. The percentage of Canadians who view the US as the greatest threat rose from 20 to 59 per cent. Domestically, fewer than 40 per cent of Americans are satisfied with their country's place in the world, down from over 70 per cent in 2003.[17] US tariffs and aid cuts in Southeast Asia contributed to China becoming the default economic partner for six of eleven Southeast Asian nations.

FIGURE 2.11

Countries strongly influenced by the United States and China, 2023

Almost every single country in the world is significantly influenced by either the United States, China, or both superpowers.



Source: IEP Analysis

China

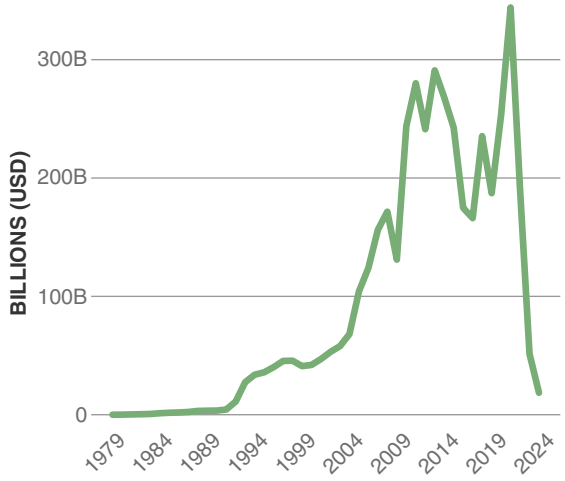
China's meteoric economic growth fuelled expectations of eventual dominance, but signs of a plateau have become evident. Its share of global GDP fell from 18.5 per cent in 2021 to around 16.5 per cent by 2024. Net FDI inflows collapsed from US$344 billion in 2021 to US$42.7 billion in 2023, as shown in Figure 2.13, with net FDI turning negative in the first half of 2024 as foreign firms repatriated more earnings than they invested. In 2025, FDI dropped another 9.5 per cent.

The Belt and Road Initiative has encountered significant pushback. Over 80 per cent of Chinese government loans go to countries experiencing debt distress, with outstanding loans exceeding US$1.1 trillion. Chinese lending to the developing world has fallen considerably since 2018, with debt servicing overtaking new loan commitments in 2019.

FIGURE 2.13

Foreign Direct Investment in China, 1979–2024

FDI into China is now at a 30-year low.



Source: World Bank

The property market slump, shrinking working-age population, and plateauing urbanisation raise the prospect of a structural slowdown reminiscent of Japan's plateau in the 1990s. Some analysts estimate that China's real GDP growth in 2024 was only 2.4 to 2.8 per cent, far below official figures.[18]

Great Power Decline

The relative influence of the traditional great powers has been declining for much of the past 30 years. Every great power other than Russia and India now accounts for a smaller share of global GDP than at the end of the Cold War. As shown in Table 2.1, Germany's share almost halved from 8.5 per cent in 1995 to 4.3 per cent in 2023. Japan's fell from 17.9 per cent to 4.0 per cent. The collective material capacity of great power nations, measured by population, industrial output, energy consumption, and military resources, fell from above 35 per cent of global capacity in 1975 to just over 20 per cent in 2016. In aggregate, middle power nations now have greater combined material capacity than great power nations.

TABLE 2.1

Great power share of global GDP, 1995 and 2023

India and Russia were the only two great powers to see their share of global GDP increase.

Great Power	Global GDP Share 1995	Global GDP Share 2023
Germany	8.5%	4.3%
Japan	17.9%	4.0%
France	5.2%	2.9%
Britain	4.4%	3.2%
Italy	3.8%	2.2%
Russia	1.3%	2.0%
India	1.1%	3.5%

No great power other than India is projected to record a single year of economic growth above 2.5 per cent before the end of the decade. The four major European powers face a shared reality of relative decline, mitigated by their embeddedness in the EU and NATO. The United Kingdom's post-Brexit recalibration has seen stagnant productivity and chronic underinvestment. France contends with high public debt and persistent unemployment. Germany's export-led model has buckled under high energy costs, China's economic slowdown, and the expense of the green transition. Italy suffers from decades of near-zero productivity growth and one of the world's highest debt-to-GDP ratios.

These powers are transitioning from primary architects of global order to influential actors within specific niches: Germany in advanced manufacturing, the UK in global finance and intelligence, France in expeditionary military power. Institutional frameworks like the EU and NATO amplify their influence beyond what they could achieve individually, yet acting through these institutions requires consensus, constraining the unilateral action that once defined great-power status.

Russia represents revisionist decline. Its economy is now only the 11th largest in nominal terms. The invasion of Ukraine triggered Western sanctions, exposed significant military weaknesses, and transformed Russia from a key player in European security to its primary antagonist. Defence production has ramped up but prioritises quantity over quality, while remaining dependent on foreign components for advanced systems. The recent increase in oil prices related to the Iran war will provide additional revenue for the government, alleviating some of the economic hardship and propping up the military. However, the impact is unlikely to extend far beyond the current oil crisis.

Japan exemplifies a different trajectory: resurgence through technological and economic sophistication. After its 'Lost Decades', Japan leads globally in robotics, advanced materials, and precision manufacturing, and holds one of the world's largest stocks of net foreign assets. It is undertaking its most significant military transformation since 1945, doubling defence spending and acquiring long-range strike capabilities. Its membership, along with Australia, India, and the US, in the Quad security forum, combined with its cornerstone alliance with the US, position it as a pivotal actor within the US-led system.

India is the sole exception to the narrative of great power decline. Having surpassed China as the world's most populous nation, with a median age under 30, it is projected to become the world's third-largest economy before 2030. By 2047, an estimated 20 per cent of the world's working-age population will live in India. Its foreign policy of 'multi-alignment', characterised by concurrent membership in the US-led Quad as well as active participation in BRICS and the Shanghai Cooperation Organisation, positions it as the pivotal global swing state, forcing both superpowers to compete for its cooperation. However, significant development challenges including high poverty, inequality, and infrastructure deficits constrain its productivity.[19]

The Rise of the Middle Powers

The number of middle power countries nearly doubled between 1991 and 2024, rising from nine to 16. This expansion has resulted in a divided landscape comprising two distinct generations of middle powers, those that existed prior to 1991 and those that have arisen since.

Established middle powers, such as Australia, Canada, South Korea, the Netherlands, Spain, Belgium, Sweden, Brazil, and Saudi Arabia, consolidated their status prior to 2008 as primary beneficiaries of the liberal international order, generally aligning with Euro-Atlantic and Pacific alliance systems.

By contrast, rising middle powers, such as the United Arab Emirates, Indonesia, Türkiye, Poland, Mexico, Israel, and Ukraine ascended during the era of the Great Fragmentation. These newer entrants often exhibit a more independent strategic profile, deriving influence from regional assertion and strategic autonomy rather than alignment with either superpower. The inclusion of Ukraine and Israel underscores how global security crises can paradoxically accelerate a nation's structural importance.

The number of emerging powers has also tripled since 1991, as shown in Figure 2.14. Countries such as Nigeria, South Africa, Argentina, Qatar, Norway, and Thailand are now approaching the threshold for middle power status. As emerging powers continue to graduate into middle powers, the grouping is becoming not only larger but also significantly more diverse and harder for any single superpower to control.

Economic and military trajectories

Middle power nations recorded dramatic economic growth over the past three decades. Their average nominal GDP increased by 524 per cent between 1991 and 2024, with the United Arab Emirates, Indonesia, Saudi Arabia, and Poland recording growth of over 800 per cent, as shown in Figure 2.15.

Brazil, Canada, South Korea, and Australia now have higher nominal GDPs than great power Russia in constant terms.

The data highlights contrasting regional fortunes. Brazil exhibits the most volatile trajectory, with nominal GDP falling 31 per cent between 2011 and 2016 before recovering. Asia-Pacific middle powers, particularly Indonesia, demonstrate more consistent growth. European middle powers like the Netherlands, Sweden, and Belgium show stable but more modest growth. Ukraine is a stark outlier, with an essentially flat trajectory reflecting structural challenges and the impact of conflict.

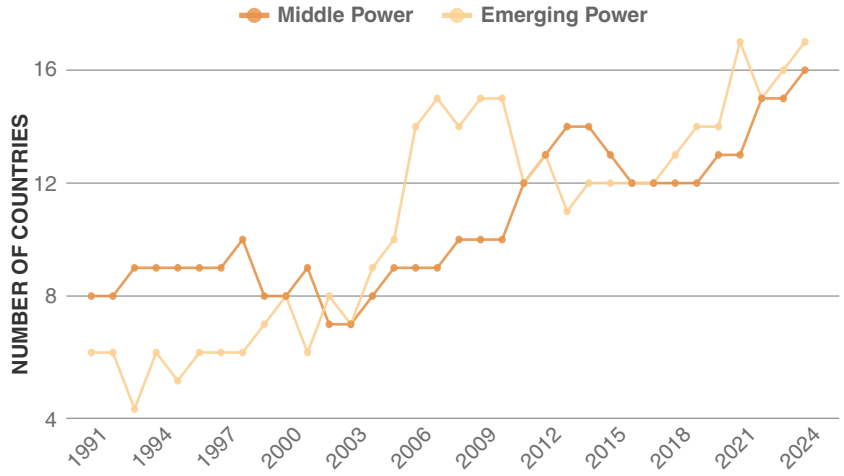
Military expenditure among middle powers remained relatively stable for much of the period but has begun increasing significantly since 2022.

The Asia-Pacific powers show the most consistent long-term growth in military spending, reflecting sustained commitment to defence. Middle Eastern powers show high volatility, with Saudi expenditure peaking at almost US$100 billion around 2015 before dropping sharply. The most striking feature is the rapid expansion of European military expenditure from 2022, as countries like Poland and Sweden sharply increased defence budgets in response to the Russia–Ukraine war.

FIGURE 2.14

Number of middle and emerging power countries, 1991–2024

The number of middle power countries has almost doubled since the end of the Cold War.



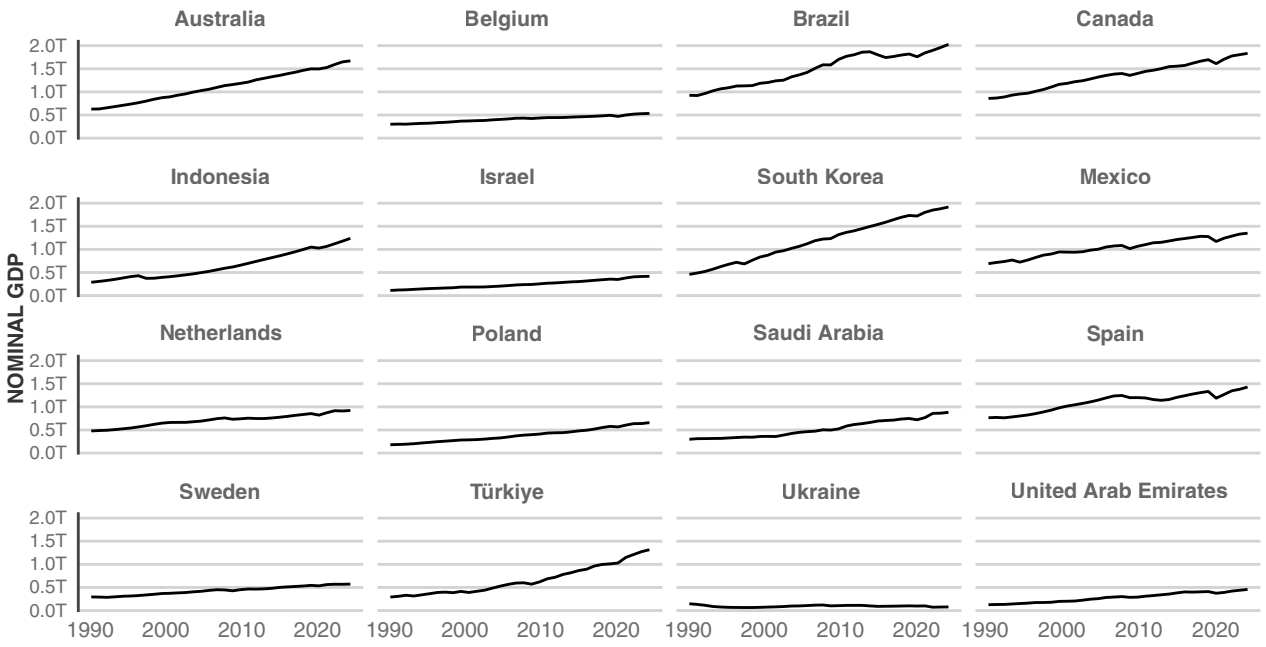
Source: IEP Calculations

Middle power nations recorded dramatic economic growth over the past three decades. Their average nominal GDP increased by 524 per cent between 1991 and 2024, with the United Arab Emirates, Indonesia, Saudi Arabia, and Poland recording growth of over 800 per cent.

FIGURE 2.15

Nominal GDP (trillions of US dollars), 1991–2024

Nominal GDP increased by an average of 524 per cent in middle power nations between 1991 and 2024.



Source: World Bank

Alignment and strategic autonomy

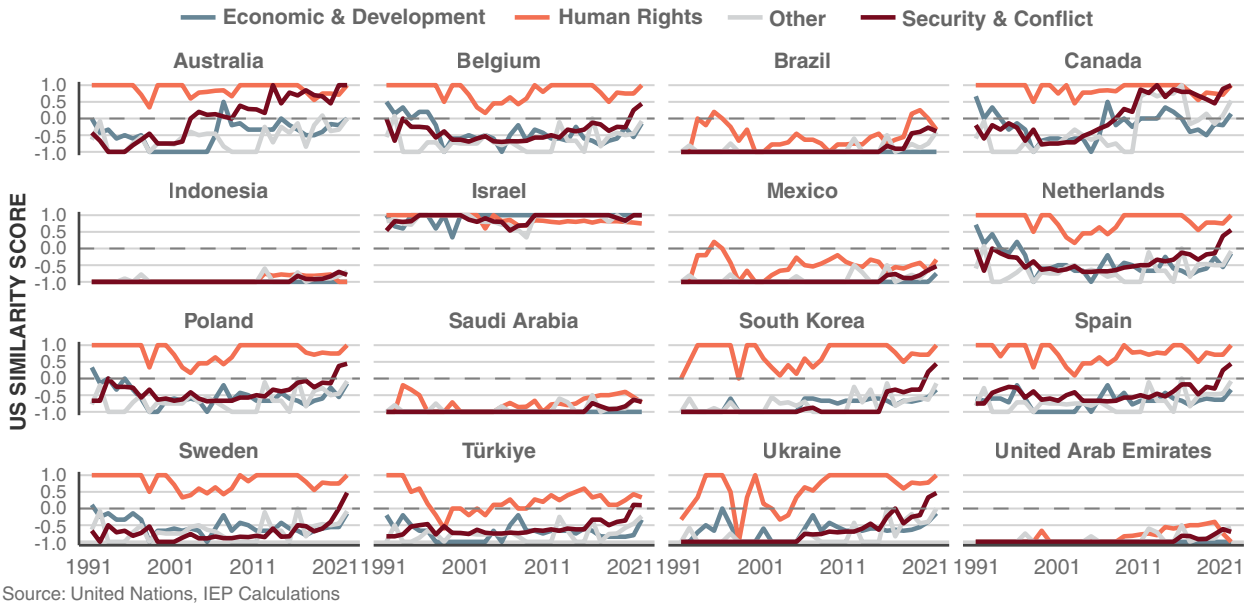
A clear divide exists between middle power nations that are closely aligned with the US and those that balance between both superpowers. This split is most pronounced in the security domain. UN General Assembly voting data, examining only votes where the US and China were in opposition, reveals two distinct groupings, as shown in Figure 2.16.

Euro-Atlantic and Pacific allies such as Australia, Belgium, Canada, the Netherlands, Poland, Spain, Sweden, and South Korea broadly demonstrate alignment with the US, particularly on human rights resolutions. By contrast, rising middle powers such as Brazil, Indonesia, Mexico, Saudi Arabia, and the United Arab Emirates often sit near the middle or lean towards China, particularly on human rights issues, reflecting a broader preference for state sovereignty over what is perceived as Western-imposed governance standards.

FIGURE 2.16

Superpower alignment in UN General Assembly voting, 1991–2023

There is a clear split between US- and China-aligned middle powers on human rights issues. A score of 1 represents alignment with the United States, while a score of -1 reflects alignment with China.



Source: United Nations, IEP Calculations

The bilateral influence data reinforces this picture. In the security domain, the US-alliance system remains dominant: Australia, Japan, South Korea, and Canada exhibit extremely high security influence from the US, with near-zero influence from China.

Saudi Arabia and the United Arab Emirates retain strong US security ties but show increasing Chinese influence, reflecting procurement of Chinese drones and missile technology. Indonesia displays a similar diversification. The economic picture, however, is more evenly balanced. For most middle powers, the post-Cold War era has seen simultaneous deepening of ties with both superpowers, a strategy of accumulation rather than alignment.

Beyond the China–US influence rivalry, rising middle powers, particularly South Korea, Türkiye, and the United Arab Emirates, demonstrate the most dynamic momentum in expanding their influence on other countries. This influence has expanded both in terms of bandwidth (the volume of their interactions with other countries) and dependence (the extent to which other countries rely on those interactions). South Korea has surged past established middle powers like Australia and Canada to rival the top European states. By contrast, established middle powers like Australia and Canada have only marginally increased their total influence over the past two decades.

European middle powers, the Netherlands, Spain, and Belgium, maintain the highest absolute influence levels, largely as a structural byproduct of European integration, which multiplies their connectivity through the EU's dense diplomatic and economic web. Just over half of middle power nations exert more than 50 per cent of their influence within their immediate region. The most regionally focused are European, while Israel and Canada are the most externally focused, Israel due to isolation from its Middle Eastern neighbours and deep structural ties with Western powers, and Canada as a transatlantic bridge.

Challenges ahead

Despite the growing influence of middle powers, many face significant constraints. Although economic growth in most middle power countries is expected to be stronger than in great powers, very few middle powers have projected growth above two per cent in the next five years, as shown in Figure 2.17.

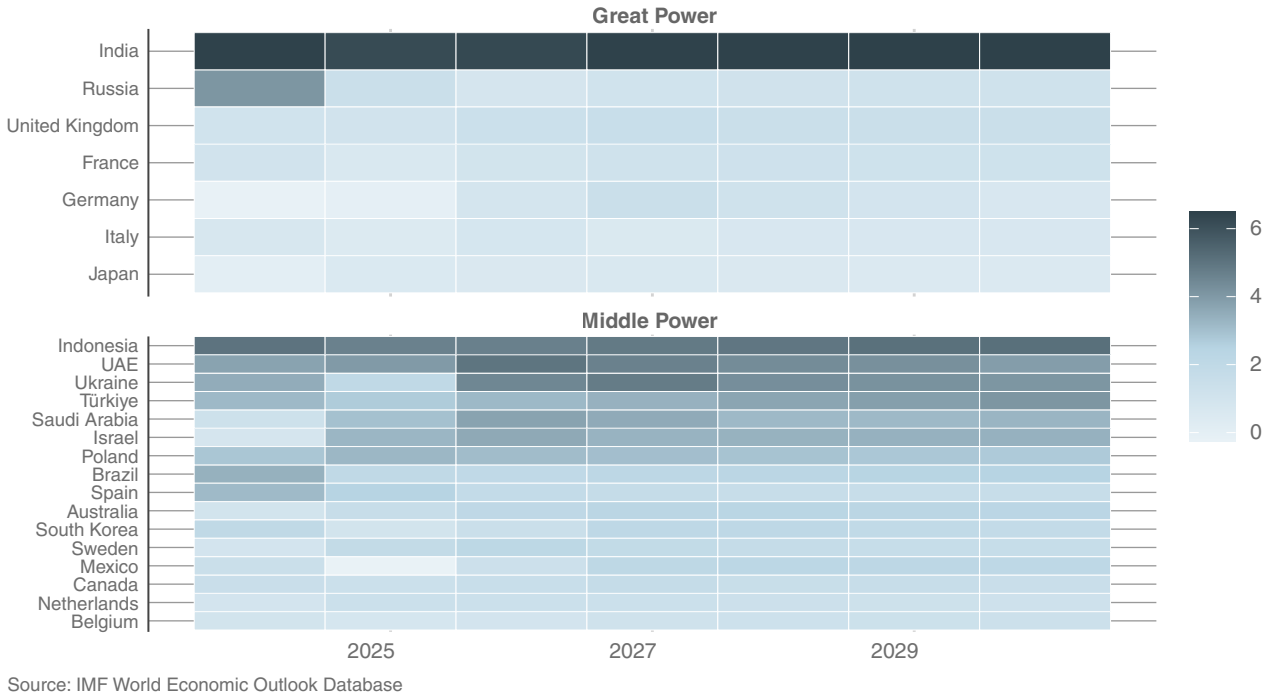
Government debt as a percentage of GDP is projected to exceed 50 per cent in half of middle power countries by 2030, with Belgium's expected to surge to over 125 per cent. A demographic bifurcation is emerging. While the UAE and Saudi Arabia retain youthful workforces, half of middle power nations are projected to have an elderly dependency ratio of over 40 retirees per 100 workers by 2050. South Korea faces the steepest trajectory, projected to become the most aged society in the group.

Countries with stronger economic growth, such as India, Indonesia, the UAE, and to a lesser extent Saudi Arabia and Türkiye are most likely to keep increasing their influence. The traditional pillars of the middle power tier, including Canada, Australia, and Western European countries, face a 'grey ceiling' where maintaining their current level of influence will become increasingly expensive. The demographic vitality of the Gulf states and Indonesia positions them to continue increasing their weight. The two-speed reality of high-growth countries, mostly concentrated in the developing world and Asia, and established economies facing stagnation implies that the material basis for future influence is shifting away from the traditional custodians of the international order.

FIGURE 2.17

Projected economic growth, great powers vs middle powers, 2024–2030

Very few middle power countries have projected growth above two per cent, though their growth projections are generally stronger than the great powers.



Source: IMF World Economic Outlook Database

The global economic impact of violence was $21.8 trillion in constant purchasing power parity (PPP) terms in 2025, equivalent to 10.5 per cent of global gross domestic product (GDP), or $2,657 per person.

In the 10 countries most affected by violence, the economic cost of violence averaged 23.4 per cent of GDP in 2025, compared to just 2.2 per cent for the 10 least affected countries.

The 2025 result represents an increase of 3.2 per cent from the previous year, largely driven by an increase in military expenditure across most regions of the world.

$49.2 billion

Expenditure on peacebuilding and peacekeeping was $49.2 billion in 2025, just 0.5 per cent of total military spending in PPP terms.

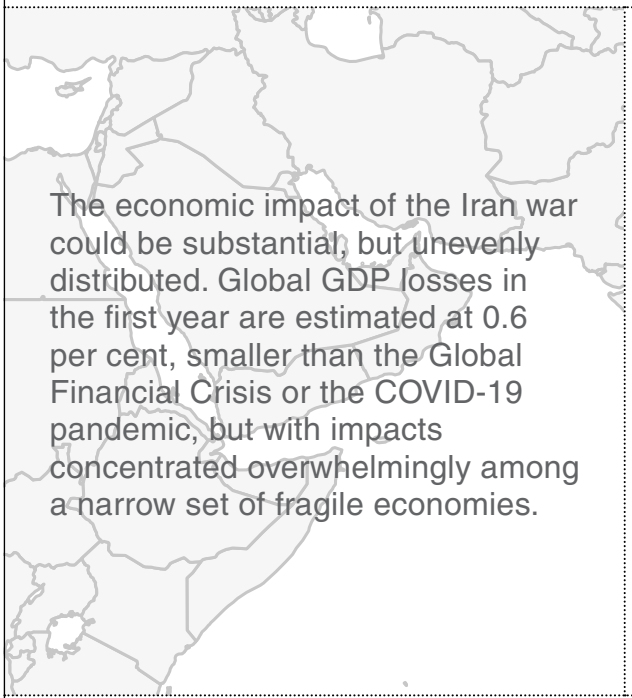
5.8%

Military expenditure increased by 5.8 per cent in 2025, the largest single increase since the inception of the GPI nearly 20 years ago.

Military and internal security expenditure accounts for 73 per cent of the total economic impact of violence. Military expenditure accounts for 43 per cent of the model, or $9.5 trillion.

Since 2008, the component of the economic model to experience the largest increase was conflict deaths, whose cost rose by 459 per cent. The economic impact of conflict deaths, GDP losses, and refugees and internally displaced persons (IDPs) has each more than tripled in the last 17 years.

Between 2024 and 2025, the economic impact of refugees and IDPs rose in 100 countries, with an average increase of 23 per cent, while military expenditure rose in 126 countries, with an average increase of 14 per cent.



The economic impact of the Iran war could be substantial, but unevenly distributed. Global GDP losses in the first year are estimated at 0.6 per cent, smaller than the Global Financial Crisis or the COVID-19 pandemic, but with impacts concentrated overwhelmingly among a narrow set of fragile economies.

The impact of the Iran war on food production is yet to be fully felt. Gulf states supply 45 per cent of global sulphur and 50 per cent of global urea; the reduction in supply hits as Q2 2026 planting begins across South Asia and East Africa, so the harvest shortfall will hit in late 2026 and early 2027.

Successful diplomacy to end the Iran war could be worth more than two trillion dollars to the global economy. Annual global GDP losses from the war would total US$1.3 trillion under a partial reopening of the Strait of Hormuz but would amount to US$3.5 trillion if the war resumes. The gap between the two is the quantifiable price of preventing escalation.

The full economic impact of the Iran war might not be felt until the end of the year. Pakistan, Egypt, and Kenya face US$5.1 billion in debt rollovers in November and December 2026, alongside disrupted harvests.

3

Economic Impact of Violence

Overview

In 2025, the impact of violence on the global economy amounted to $21.8 trillion in purchasing power parity (PPP) terms. This is equivalent to 10.5 per cent of global GDP, or $2,657 per person. This represents an increase of 3.2 per cent over the past year.

The global economic impact of violence is defined as the expenditure and economic effect related to containing, preventing, and dealing with the consequences of violence. Understanding the economic impact of violence provides a basis for calculating the economic benefits resulting from improvements in peace.

Violence and the fear of violence create significant economic disruptions. Violent incidents generate costs in the form of property damage, physical injury, and psychological trauma. Fear of violence also alters economic behaviour, primarily by reducing the propensity to invest and consume. Expenditure on preventing, containing, and dealing with the consequences of violence also diverts public and private resources away from more productive activities and towards protective measures. It also results in economic losses in the form of productivity shortfalls, foregone earnings, and distorted expenditure.

The economic impact of violence can be broken down into three components: direct costs, indirect costs, and a multiplier effect.

The direct costs of violence include the immediate consequences to the victims, perpetrators, and public systems, including health, judicial, and public safety systems. The indirect cost refers to longer-term costs, such as lost productivity resulting from the physical and psychological effects and the impact of violence on the perception of safety and security in society. The multiplier effect represents the economic benefits that would be generated by the diversion of expenditure away from sunk costs, such as incarceration spending, and into more productive alternatives, such as business support or education.

The model not only includes what is directly measured in the GPI but also includes other costs, such as expenditure on refugees and internally displaced persons (IDPs), losses from conflict, the economic impacts of suicides and internal security expenditure.

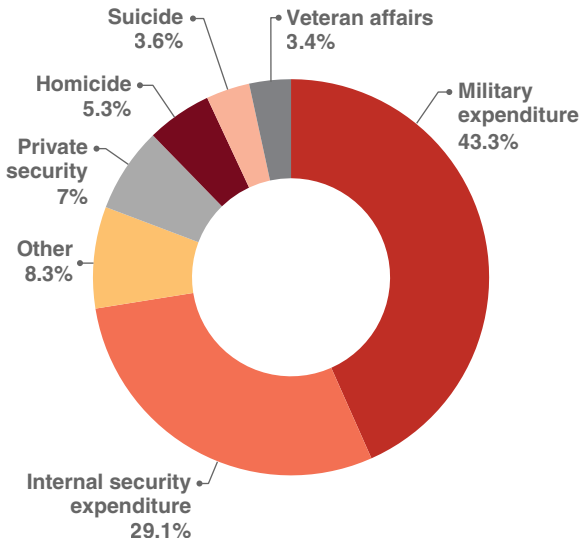
The Value of Peace in 2025

The economic impact of violence was $21.8 trillion in 2025. This was a 3.2 per cent increase from the previous year, owing largely to an increase in military expenditure across most regions of the world. Figure 3.1 displays the breakdown of the total economic impact of violence by category for 2025.

FIGURE 3.1

Composition of the global economic impact of violence, 2025

Military and internal security expenditure accounts for over 70 per cent of the total economic impact of violence.



Source: IEP Calculations

The single largest component of the model was military expenditure, which totalled $9.5 trillion, or 43 per cent of the total economic impact. This measure may differ from other measures of military expenditure as the IEP model includes the multiplier, veteran affairs and other costs.

Internal security expenditure was the second largest component, comprising 29 per cent of the model, at $6.4 trillion. It includes spending on the police and the judicial system as well as the costs associated with incarceration.

Table 3.1 gives a more detailed breakdown of the total economic impact of violence across 18 categories, as well as the change in the impact from 2024 to 2025.

TABLE 3.1

Change in global economic impact of violence, billions of PPP 2025 US dollars, 2024–2025

The total economic impact of violence increased by 3.2 per cent from 2024 to 2025.

CATEGORY	DIRECT	INDIRECT	MULTIPLIER	TOTAL 2025	TOTAL 2024	CHANGE	% CHANGE
Military expenditure	4,726	0	4,726	9,452	8,931	521	5.8
Internal security expenditure	3,175	0	3,175	6,351	6,205	146	2.4
Private security	758	0	758	1,516	1,522	-6.6	-0.4
Homicide	101	960	101	1,162	1,148	13.3	1.2
Suicide	1.1	774	1.1	776	768	8.0	1.0
Veteran affairs	370	0	370	741	759	-18.4	-2.4
Violent crime	39.3	343	39.3	421	419	2.4	0.6
Refugees and IDPs	0	379	0	379	378	0.7	0.2
GDP losses	0	368	0	368	363	5.0	1.4
Sexual violence	17.1	232	17.1	266	265	1.3	0.5
Incarceration	72.2	0	72.2	144	142	2.4	1.7
Fear	0	82.9	0	82.9	74.0	8.9	12.0
Conflict deaths	30.2	0	30.2	60.4	60.9	-0.5	-0.8
Peacebuilding	19.5	0	19.5	39.0	40.2	-1.2	-3.0
Small arms	11.6	0	11.6	23.2	23.7	-0.5	-2.1
Peacekeeping	5.1	0	5.1	10.1	10.4	-0.3	-2.9
UNHCR funding	4.3	0	4.3	8.6	8.8	-0.2	-2.3
Terrorism	0.5	4.3	0.5	5.2	7.4	-2.2	-29.7

Globally, the economic impact of military expenditure increased by 5.8 per cent in 2025, or $521 billion. The general trend in military expenditure is rising, with a significant surge observed over the past three years. Many European countries have committed to spending more in the near future, due largely to the ongoing conflict in Ukraine.

Expenditure on private security declined by 0.4 per cent. Private security is the third largest category in the model and comprises seven per cent of the total. Private security includes all businesses that provide security services, such as bodyguards and armed guards both inside and outside of conflict zones.

Homicide is the fourth largest component in the model, representing five per cent of the global economic impact of violence, or $1.16 trillion. The economic impact of homicide rose by 1.2 per cent from the previous year, although it has been one of the few categories to show a sustained improvement over the past 17 years.

Suicide is the fifth largest component in the model, representing nearly four per cent of the total impact. Last year, the economic impact of suicide increased by one per cent. The economic impact of violent crime rose by 0.6 per cent in 2025. Violent crime comprises acts such as assault and sexual violence. It is the seventh largest component of the model, representing two per cent of the total economic impact of violence.

Trends in the Economic Impact of Violence

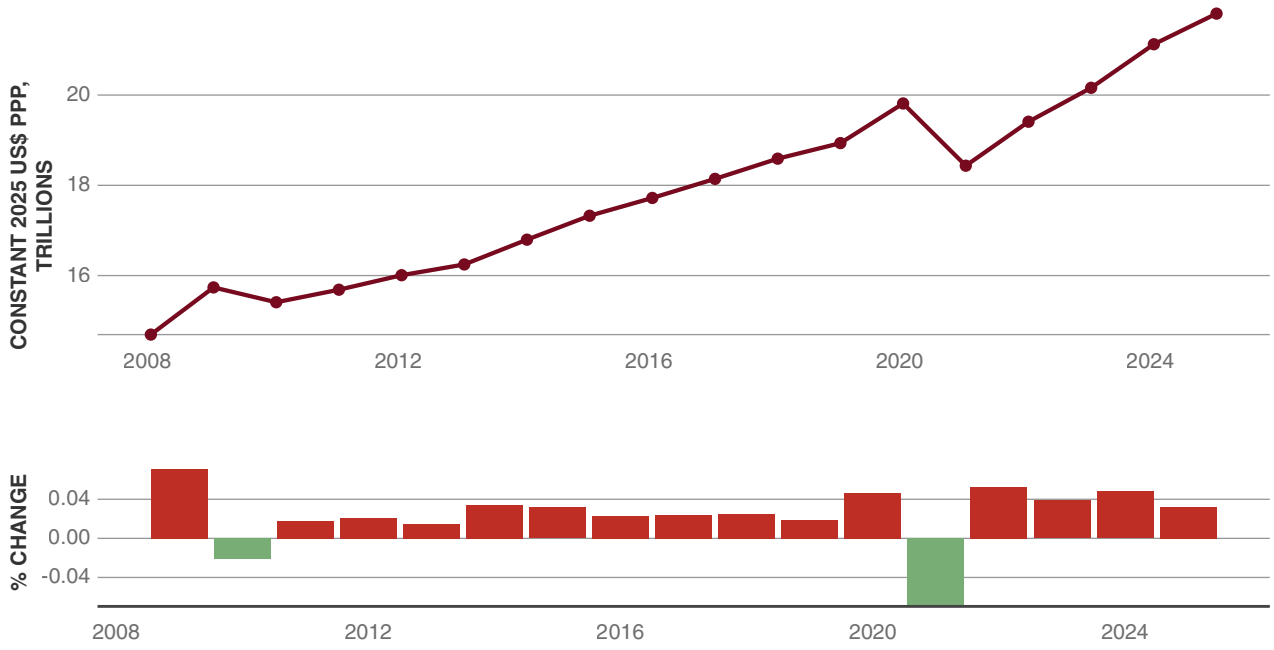
In inflation adjusted terms the overall impact of violence was 48.4 per cent higher in 2025 than in 2008, as shown in Figure 3.2. Improvements were recorded in 2009 and again in 2020, but the impact has otherwise risen steadily. Since 2008, 135 countries have recorded deteriorations while 24 have improved.

Table 3.2 shows a breakdown of the change in the economic impact of violence between 2008 and 2025 by category. Costs associated with conflict deaths, GDP losses from conflict, and refugees and IDPs each more than tripled.

FIGURE 3.2

Trends in the global economic impact of violence, 2008–2025

The economic impact of violence has increased year on year for 15 of the past 17 years.



Source: IEP Calculations

TABLE 3.2

Change in global economic impact of violence, billions of PPP 2025 US dollars, 2008–2025

CATEGORY	2008	2025	TOTAL CHANGE	% CHANGE
Conflict deaths	10.8	60.4	49.6	459
GDP losses	79.6	368.0	288.4	363
Refugees and IDPs	95.1	379.0	283.9	298
UNHCR funding	3.5	8.6	5.1	146
Small arms	9.5	23.2	13.7	144
Sexual violence	137.9	266.0	128.0	93
Veteran affairs	417.8	741.0	323.2	77
Military expenditure	5,684.0	9,452.0	3,768.0	66
Internal security expenditure	4,106.0	6,351.0	2,245.0	55
Suicide	677.9	776.0	98.1	14
Fear	72.6	82.9	10.3	14
Incarceration	135.2	144.0	8.8	7
Peacebuilding	37.3	39.0	1.7	5
Private security	1,516.0	1,516.0	-0.3	0
Homicide	1,218.1	1,162.0	-56.1	-5
Violent crime	479.6	421.0	-58.6	-12
Terrorism	10.3	5.2	-5.1	-50

Economic Impact by Domain

The 18 categories of the economic impact of violence can be grouped into three domains: *Armed Conflict, Interpersonal and Self-Inflicted Violence*, and *Violence Containment*. The relative long-term trends in the model differ significantly across these three domains. Table 3.3 shows the categories included in the domains, while Figure 3.3 shows the indexed change in the domains since 2008.

The *Armed Conflict* domain has more than tripled since 2008, while *Violence Containment* and *Interpersonal and Self-Inflicted Violence* have recorded relatively small changes.

TABLE 3.3

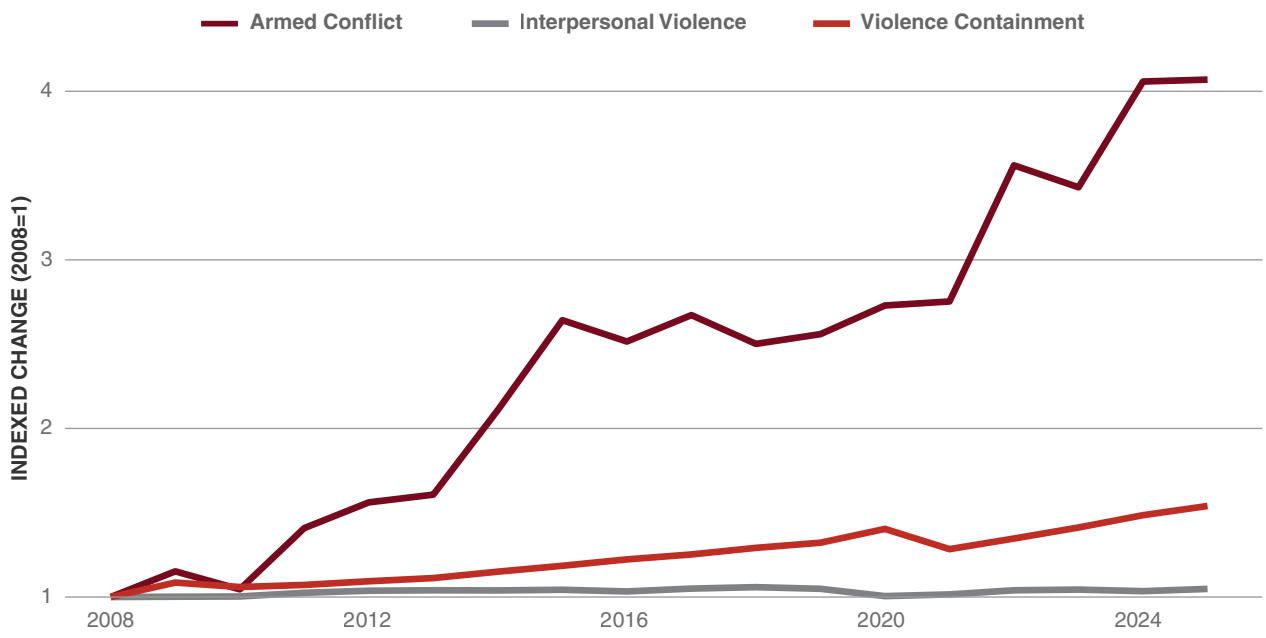
Economic impact of violence: domains and categories

VIOLENCE CONTAINMENT	ARMED CONFLICT	INTERPERSONAL AND SELF-INFLICTED VIOLENCE
Military expenditure	Direct costs of deaths from internal violent conflict	Homicide
Internal security expenditure	Direct costs of deaths from external violent conflict	Violent assault
Veteran affairs	Indirect costs of violent conflict (GDP losses due to conflict)	Sexual assault
Private security	Losses from status as refugees and IDPs	Fear of crime
UN peacekeeping	Small arms imports	Indirect costs of incarceration
ODA peacebuilding expenditure	Terrorism	Suicide
UNHCR funding		

FIGURE 3.3

Indexed trend in economic impact by domain, 2008–2025

The economic impact of *Armed Conflict* has more than tripled since 2008.



Source: IEP Calculations

Armed Conflict

The economic impact of *Armed Conflict* on the global economy in 2025 amounted to $835 billion, broadly unchanged from the year prior, with only small changes in the number of refugees and conflict deaths. The *Armed Conflict* domain includes the costs associated with violence caused by organised groups such as national militaries and security forces, militia groups, and terrorist organisations.

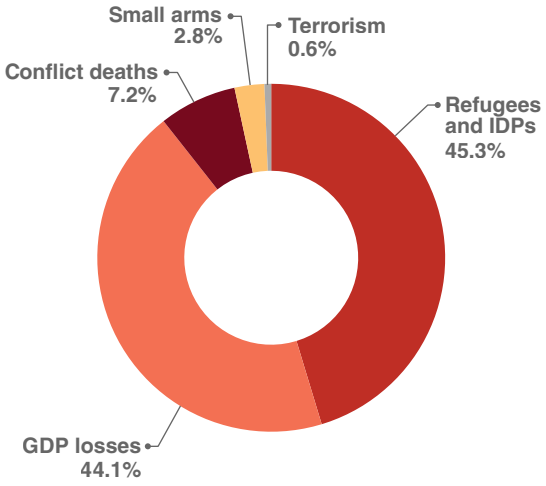
It also includes conflict within and between states, militias and drug cartels, violent political repression, genocide, and terrorism. The three regions with the highest economic impact from *Armed Conflict* are sub-Saharan Africa, the Middle East and North Africa (MENA), and Eastern Europe and Central Asia.

Figure 3.4 shows the composition of the economic impact of *Armed Conflict* in 2025. Refugees and IDPs is the largest component, accounting for approximately 45 per cent of the economic impact in the domain, followed closely by GDP losses from conflict at 44 per cent. The economic costs from IDPs and refugees arise from the lost economic output of displaced people.

FIGURE 3.4

Composition of the *Armed Conflict* domain, 2025

Refugees and IDPs and GDP losses together account for 89 per cent of the global economic impact of Armed Conflict.



Source: IEP Calculations

Interpersonal and Self-Inflicted Violence

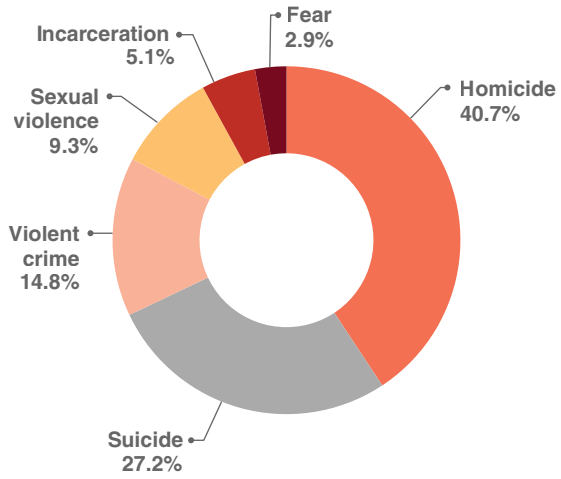
The economic impact of *Interpersonal and Self-Inflicted Violence* aggregates homicide, violent and sexual assault, suicide, and the fear of violence. In 2025, the economic impact of *Interpersonal and Self-Inflicted Violence* on the global economy amounted to $2.85 trillion, a 1.3 per cent increase from the prior year.

Figure 3.5 shows the composition of the economic impact of the *Interpersonal and Self-Inflicted Violence* domain. Homicide accounts for approximately 41 per cent of the domain's economic impact, followed by suicide at 27 per cent and violent crime at 15 per cent.

FIGURE 3.5

Composition of the *Interpersonal and Self-Inflicted Violence* domain, 2025

Homicide accounts for more than two-fifths of the economic impact of *Interpersonal and Self-Inflicted Violence*.



Source: IEP Calculations

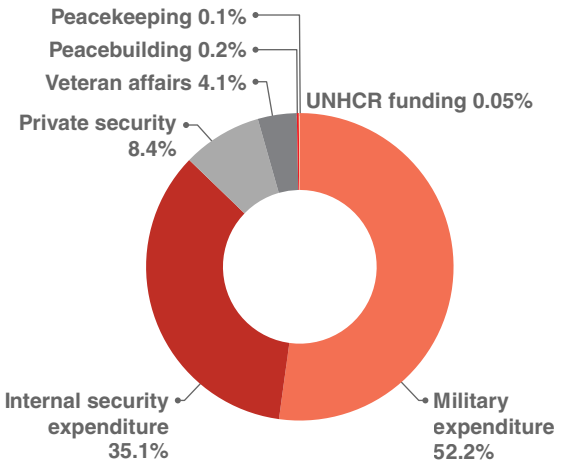
Violence Containment

The domain of the economic impact of violence model with the greatest overall cost is *Violence Containment*. It consists of all spending which aims to prevent and contain the spread of violence. In 2025, the economic impact of *Violence Containment* on the global economy amounted to $18.12 trillion, a 3.7 per cent increase from the prior year. Figure 3.6 shows the composition of the economic impact for this domain.

FIGURE 3.6

Composition of the economic impact of the *Violence Containment* domain, 2025

Peacebuilding and peacekeeping are only a tiny fraction of the economic impact of *Violence Containment*.



Source: IEP Calculations

Military expenditure is the largest component of this domain, accounting for 52 per cent of the total, while internal security expenditure is the second largest component, at 35 per cent. Internal security expenditure encompasses all the expenses associated with the police and judicial system. Private security

accounts for eight per cent of the economic impact of *Violence Containment*, while peacebuilding and peacekeeping combined account for less than one per cent.

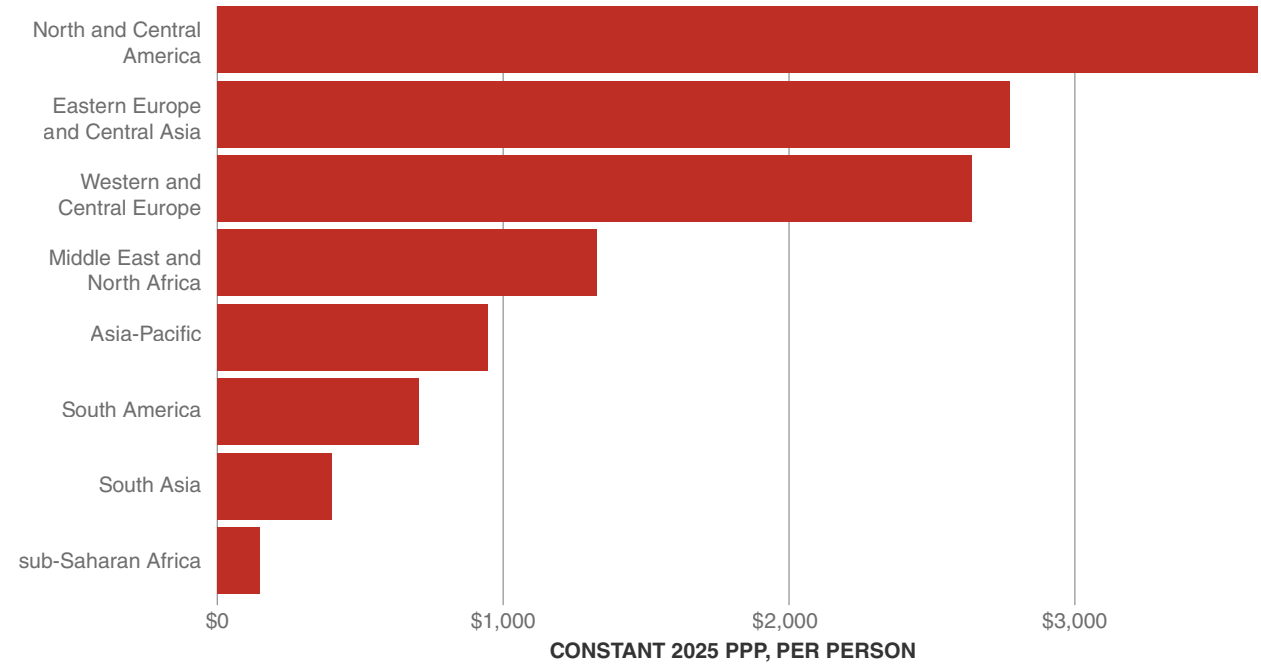
The distribution of the economic impact of *Violence Containment* varies considerably from region to region, as shown in Figure 3.7. In 2025, the cost of *Violence Containment* in North and Central America was $3,634 per person, the highest of any region. In contrast, per capita spending in sub-Saharan Africa was just $141, and in South Asia $401. However, to fully comprehend these figures they need to be considered in relation to the per capita income of the region or country as police and other personnel are paid in the local currency. North America has one of the highest per capita incomes in the world.

Table 3.4 shows the 10 countries with the highest military expenditure as a total, per capita, and as a percentage of GDP. The United States spends the most of any country annually on its military, followed by China and Russia. North Korea has the highest per capita spending and highest military spending as a percentage of its GDP, followed by Ukraine, reflecting the impact of the ongoing war with Russia.

FIGURE 3.7

Per capita containment spending (military and internal security) by region, 2025

In 2025, North and Central America recorded the highest per capita cost of *Violence Containment* spending globally.



Source: IEP Calculations

TABLE 3.4

Military expenditure in PPP terms: total, per capita and as a percentage of GDP, 2025

COUNTRY	MILEX (TOTAL, BILLIONS)
United States	1,874.18
China	1,041.66
Russia	903.92
India	696.27
North Korea	452.97
Ukraine	319.94
Germany	266.03
Saudi Arabia	258.81
United Kingdom	206.94
Japan	203.79

COUNTRY	MILEX (PER CAPITA)
North Korea	17,038.32
Qatar	11,980.94
Singapore	9,853.27
Ukraine	8,211.97
Saudi Arabia	7,485.21
Israel	7,306.65
Norway	6,878.91
United Arab Emirates	6,305.51
Russia	6,277.91
Kuwait	5,697.39

COUNTRY	MILEX (% OF GDP)
North Korea	24.00
Ukraine	21.21
Afghanistan	13.74
Algeria	8.75
Palestinian Territories	8.20
Israel	6.50
Russia	6.34
Oman	6.33
Armenia	6.06
Libya	5.26

Regional and Country Analysis

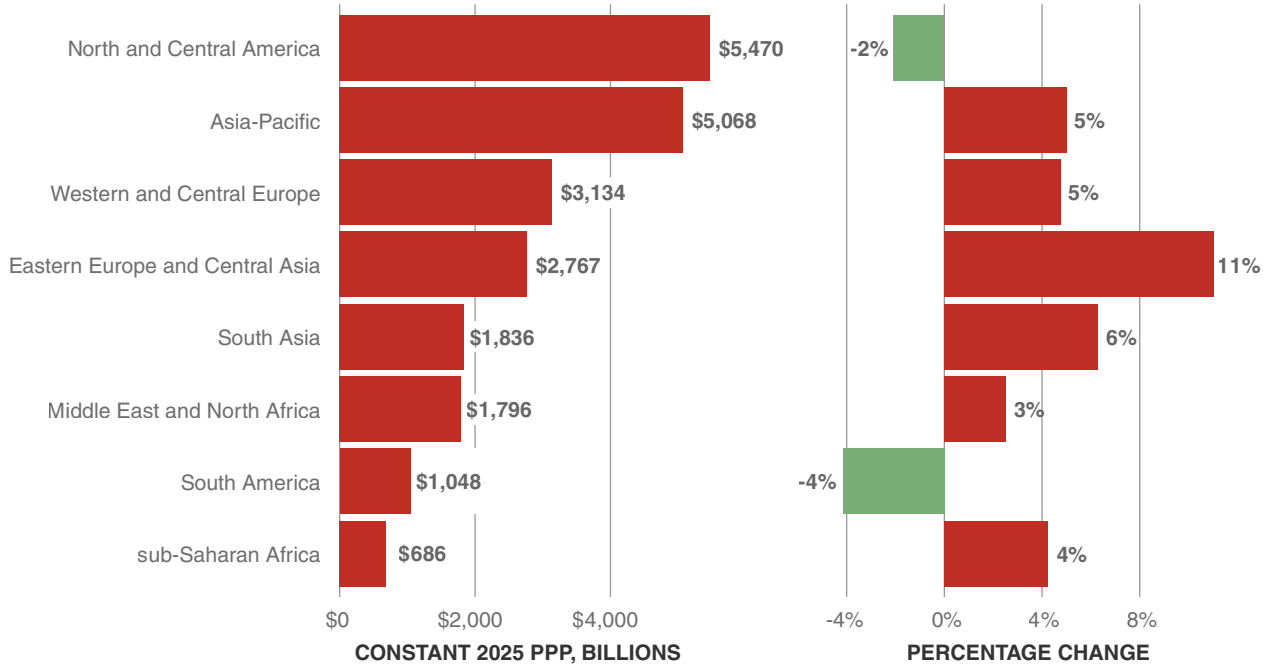
There are noticeable regional differences in the economic impact of violence. In some regions, the *Violence Containment* domain, and in particular military expenditure, accounts for most of the economic impact, while in other regions crime and conflict are the largest components of the economic impact of violence.

The economic impact of violence deteriorated for six regions of the world in 2025 and improved in two as shown in Figure 3.8. Eastern Europe and Central Asia had the largest deterioration, at 11.0 per cent. This was driven primarily by Ukraine, Russia, and Armenia, where increases in military expenditure dominated. Western and Central Europe recorded the second largest deterioration at 4.8 per cent, also driven primarily by sustained increases in military expenditure linked to the war in Ukraine. North and Central America and South America were the only two regions to record an improvement in their economic impact of violence in 2025.

As shown in Figure 3.9, the largest variation between regions is in military expenditure. It represents 57.5 per cent of the economic impact for the MENA region, compared to 20.3 per cent in South America. The proportions of internal and private security spending also vary between regions, from over 41 per cent in South Asia to under 27 per cent in MENA.

FIGURE 3.8

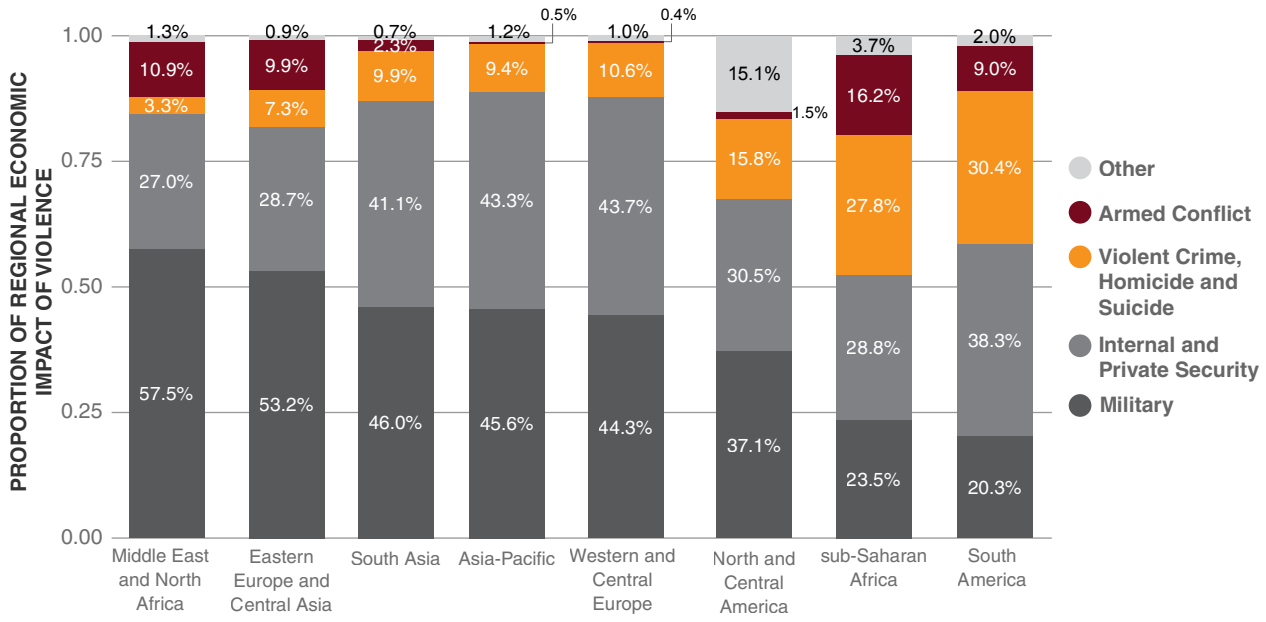
Total economic impact and change by region, 2024–2025



Source: IEP Calculations

FIGURE 3.9

Composition of the regional economic cost of violence, 2025



Source: IEP Calculations

The Middle East and North Africa have the highest relative impact from military expenditure.

Table 3.5 shows the 10 countries with the highest economic cost of violence as a percentage of GDP. The economic cost of violence for the most affected countries ranged from 15.2 to 45.8 per cent of their GDP. These countries tend to have combinations of high levels of armed conflict, large numbers of internally displaced persons, high levels of interpersonal violence and large militaries.

In these 10 countries, the economic cost of violence averaged 23.4 per cent of GDP in 2025. In contrast, among the world's 10 most peaceful countries, the average economic cost of violence was equivalent to 2.2 per cent of GDP.

The country with the highest cost of violence is Ukraine, where the cumulative cost of military expenditure, conflict deaths, GDP losses and the displacement of millions of people pushed the economic cost of violence above 45 per cent of GDP. Afghanistan's high cost can be attributed to high military spending relative to its GDP, high internal security costs, and high costs associated with refugees and IDPs. Other countries affected by high-intensity conflict suffer higher costs from conflict deaths and losses from refugees and IDPs, as well as higher costs from homicide. These countries include Syria, North Korea, South Sudan, Somalia, Sudan, the Central African Republic, Eritrea, and Colombia.

TABLE 3.5

Countries with the highest economic cost of violence as a percentage of GDP, 2025

There are 10 countries where the cost of violence is equivalent to more than 15 per cent of GDP, and in four of these, it exceeds 25 per cent.

COUNTRY	ECONOMIC COST OF VIOLENCE (% OF GDP)
Ukraine	45.83
Afghanistan	31.43
North Korea	27.43
Syria	25.35
South Sudan	19.97
Somalia	18.25
Sudan	17.59
Eritrea	16.71
Central African Republic	16.16
Colombia	15.20
Average	23.39

Methodology at a Glance

The global economic impact of violence is defined as the expenditure and economic effects related to containing, preventing, and dealing with the consequences of violence. The estimate includes the direct and indirect costs of violence, as well as an economic multiplier. The multiplier effect calculates the additional economic activity that would have accrued if the direct costs of violence had been avoided.

Expenditure on containing violence is economically efficient when it effectively prevents a cost of violence that would be higher. However, spending beyond an optimal level has the potential to constrain a nation's economic growth. Therefore, achieving the right levels of spending on public services such as military, judicial, and security services is important for the most productive use of capital.

This study includes two types of costs: direct and indirect. Examples of direct costs include medical costs for victims of violent crime, capital destruction from violence, and costs associated with security and judicial systems. Indirect costs include lost wages or productivity from crime due to physical and emotional trauma. There is also a measure of the impact of fear on the economy, as people who fear that they may become a victim of violent crime alter their behaviour.

An important aspect of IEP's estimation is the international comparability of country estimates, thereby allowing cost/benefit analysis of country interventions. The methodology uses constant prices purchasing power parity (PPP) international dollars, which allows for the costs of various countries to be compared with one another. By using PPP estimates, the analysis takes into consideration the differences in the average level of prices between countries. For instance, if the US dollar cost of a basket of goods in country A is higher than the US dollar cost of the same basket of goods in country B, then one US dollar will have a lower purchasing power in country A than in B. Thus, an expense of US dollars in country B will be more meaningful than a similar expense in country A. IEP's use of PPP conversion rates means that the estimates of the economic impact of violence accurately captures the true significance of that impact or expense in each country.

IEP estimates the economic impact of violence by comprehensively aggregating the costs related to violence, armed conflict, and spending on military and internal security services. The GPI is the initial point of reference for developing the estimates for most variables, however some variables are not in the GPI, such as suicide, and are calculated separately.

The 2026 version of the economic impact of violence includes 18 variables in three groups, shown in Table 3.3.

The estimation only includes variables of violence for which reliable data could be obtained. The following elements are examples of some of the items not counted in the economic impact of violence:

- The cost of crime to business
- Domestic violence
- Household out-of-pocket spending on safety and security
- Spillover effects from conflict and violence

A unit cost approach was used to cost variables for which detailed expenditure was not available. The unit costs were obtained from a literature review and appropriately adjusted for all countries included. The study uses unit costs from McCollister, French and Fang for homicides, violent and sexual crimes.[1] The McCollister, French and Fang cost of homicides is also used for battle deaths and deaths from terrorism. The unit cost for fear of crime is sourced from Dolan and Peasgood.[2]

The total economic impact of violence includes the following components:

- **Direct costs** are the cost of violence to the victim, the perpetrator and the government. These include direct expenditures, such as the cost of policing, military, and medical expenses. For example, in the calculation of homicides for a given country, the total number of homicides is computed and multiplied by the unit costs estimated by McCollister, French and Fang. The result is updated and converted using country specific inflation and exchange rates.

- **Indirect costs** accrue after the violent event and include indirect economic losses, physical and psychological trauma to the victim, and lost productivity.

- **The multiplier effect** represents the flow-on effects of direct costs, such as the additional economic benefits that would come from investment in business development or education, instead of the less-productive costs of containing or dealing with violence. Box 3.1 provides a detailed explanation of the peace multiplier used.

The term **economic impact of violence** covers the combined effect of direct and indirect costs and the multiplier effect, while the economic cost of violence represents the direct and indirect cost of violence. When a country avoids the economic impact of violence, it realises a **peace dividend**.

BOX 3.1

The multiplier effect

The multiplier effect is a commonly used economic concept, which describes the extent to which additional expenditure improves the wider economy. Every time there is an injection of new income into the economy, this will lead to more spending, which will in turn create employment, further income and additional spending. This mutually reinforcing economic cycle is known as the 'multiplier effect' and is the reason that a dollar of expenditure can create more than a dollar of economic activity.

Although the exact magnitude of this effect is difficult to measure, it is likely to be particularly high in the case of expenditure related to containing violence. For instance, if a community were to become more peaceful, individuals would spend less time and resources protecting themselves against violence. Because of this decrease in violence there are likely to be substantial flow-on effects for the wider economy, as money is diverted towards more productive areas such as health, business investment, education and infrastructure.

When a homicide is avoided, the direct costs, such as the money spent on medical treatment and a funeral, could be spent elsewhere. The economy also benefits from the lifetime income of the victim. The economic benefits from greater peace can therefore be significant. This was also noted by Brauer and Tepper-Marlin (2009), who argued that violence or the fear of violence may result in some economic activities not occurring at all.[3] More generally, there is strong evidence to suggest that violence and the fear of violence can fundamentally alter the incentives for business. For instance, an analysis of 730 business ventures in Colombia from 1997 to 2001 found that with higher levels of violence, new ventures were less likely to survive and profit. Consequently, with greater levels of violence, it is likely that we might expect lower levels of employment and economic productivity over the long-term, as the incentives faced discourage new employment creation and longer-term investment.

The multiplier is also applied to military expenditure to reflect the opportunity cost of this spending. The underlying premise is that military outlays generate a smaller flow-on effect through the broader economy than alternative forms of public expenditure. Investment in areas such as business, health, education, or infrastructure typically yields higher fiscal multipliers, with stronger downstream effects on productivity, employment, and household consumption.

This study assumes that the multiplier is one, signifying that for every dollar saved on violence containment, there will be an additional dollar of economic activity. This is a relatively conservative multiplier and broadly in line with similar studies.

Economic Impact of the Iran War

The war in Iran began on 28 February when the United States and Israel launched joint airstrikes on Iranian nuclear, military, and leadership infrastructure in Operation Epic Fury. Iran quickly retaliated, launching more than 2,000 drone strikes and 500 ballistic missiles at Israel and US bases across the Gulf.[4]

Iran closed the Strait of Hormuz in early March. Prior to the closing, around 20 million barrels a day moved through the Strait of Hormuz. Saudi Arabia and the UAE managed to recover a combined seven million barrels per day (mb/d) of their oil export through alternative pipelines. Over 13 million barrels per day of Gulf oil exports and all Qatari liquid natural gas (LNG) were left stranded.[5] Saudi Arabia is still exporting 5.5 mb/d and the UAE 1.5 mb/d through other pipelines.

A two-week ceasefire was announced in early April. Direct US-Iran talks collapsed without agreement, prompting the US Navy to impose a blockade of Iranian ports. The result was a de facto dual blockade, with the United States restricting access to Iranian ports while Iran continued to choke the Strait of Hormuz. The arrangement persisted through mid-May despite recurring strain, including renewed Iranian strikes on the UAE in early May.

The economic consequences of the war have extended well beyond Iran. At the start of May the US Department of Defense estimated Iran had lost approximately US$4.8 billion in oil revenue since the blockade began. Brent crude surged above US$100 per barrel in late April, rising to US$110 by mid-May reflecting fears of prolonged disruption to a chokepoint that ordinarily carries around a fifth of global seaborne oil trade.

The full economic impact of the war in Iran is yet to be felt. There are many ways in which it could affect global economic activity over the next few years, depending on the course the war takes. Different countries are also likely to be impacted to different degrees, with fragile, high-debt energy importers particularly likely to be heavily impacted. This section looks at the economic impact of the war across three different scenarios:

- **Scenario 1 (S1): The war ends now.** Losses in the first part of the war cannot be recovered, but global economic activity recovers quickly. However, this scenario has practically passed. It covers the period from February to April 2026 when the ceasefire began. This scenario has been added so that the initial impact of the war can be understood.

- **Scenario 2 (S2): Extended ceasefire or stalemate.** The Strait of Hormuz is partially reopened, Iranian naval harassment continues, shipping risk premiums remain elevated. This is a likely scenario.

- **Scenario 3 (S3): The war resumes and the Strait of Hormuz is shut for an extended period.** No agreement can be reached, Iran resumes strikes on Gulf energy infrastructure, regional actors are drawn into the conflict, and/or Strait of Hormuz is closed for six or more months. Low to medium probability.

Figure 3.10 shows the estimated global economic impact across all three scenarios in 2026, compared to other major economic shocks in their first year in the past two decades. The 2008-09 Global Financial Crisis cut world output by about 3.5 percentage points relative to the pre-crisis trend in its first year. COVID-19 contracted global GDP by 3.1 per cent in 2020 against a pre-pandemic forecast of +2.8 per cent. The Ukraine war reduced global GDP by around 1.5 percentage points in its first year.[6]

By contrast, the impact of the Iran war in the first year starting in February 2026 is estimated at 0.6 percentage points of world GDP under S2. The impact is smaller than other historical shocks, but it is concentrated far more narrowly. A small group of countries and income groups would absorb most of the loss. For a more detailed explanation of how the figures for each of the scenarios were calculated (see Box 3.2).

It should be noted IEP's headline GDP loss estimates are intentionally conservative. They sit at the lower end of other estimates and smooth out severe near-term quarterly disruption. These estimates do not fully capture financial contagion and longer term second-order demand destruction, which are the most likely sources of non-linear escalation. As such, these estimates should be considered the minimum likely economic impact of the War in Iran.

The gap between S2 and S3 is approximately $2.2 trillion in annual GDP loss in PPP terms. This is the value of successful diplomacy. The compounding monthly economic impact increases under each scenario because of the non-linear impact of financial contagion, debt distress, and food insecurity.[7]

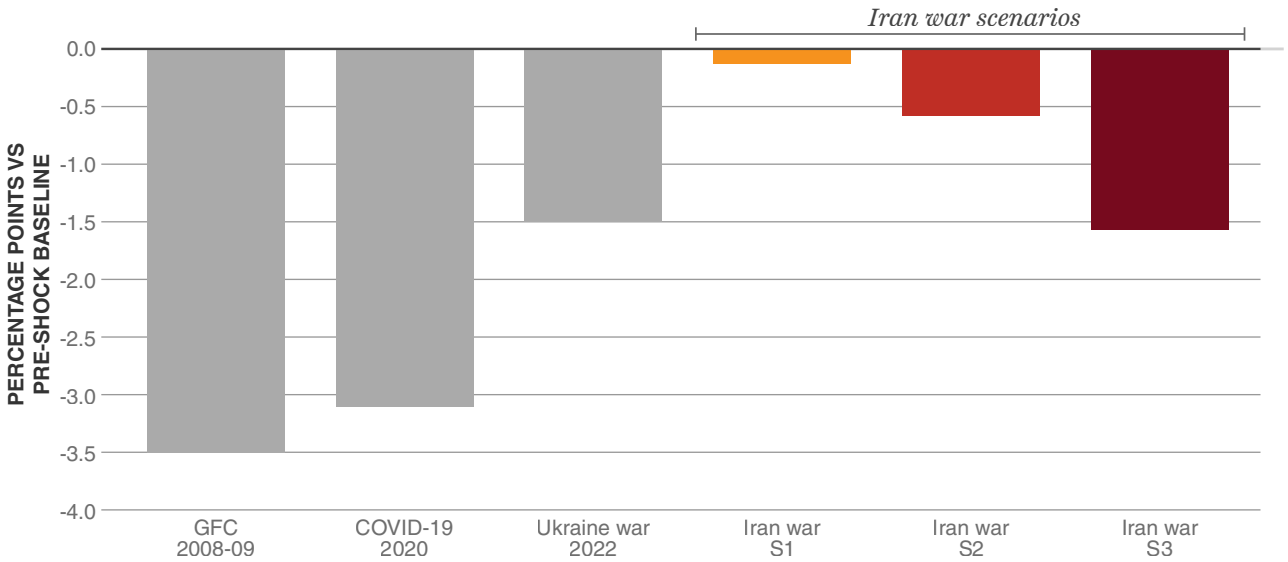
Energy market disruption

The Strait of Hormuz is a global energy chokepoint, as shown in Figure 3.11. The strait is only 33 kilometres wide at its narrowest point. It carries approximately 20 million barrels per day of crude oil and petroleum products, roughly one-fifth of global petroleum liquids consumption and over a quarter of global seaborne oil trade.[8] It also moves around 81 million tonnes per year of Qatari LNG, or approximately 20 per cent of global supply, for which no pipeline alternative exists. Iran's closure of the strait in early March initially stranded an estimated 13 million barrels per day of Gulf exports. Saudi Arabia and the UAE managed to recover a combined seven million barrels per day of their oil export through alternative pipelines. It was the largest supply disruption ever recorded in the global oil market.[9]

FIGURE 3.10

Economic impact of major global shocks vs Iran war

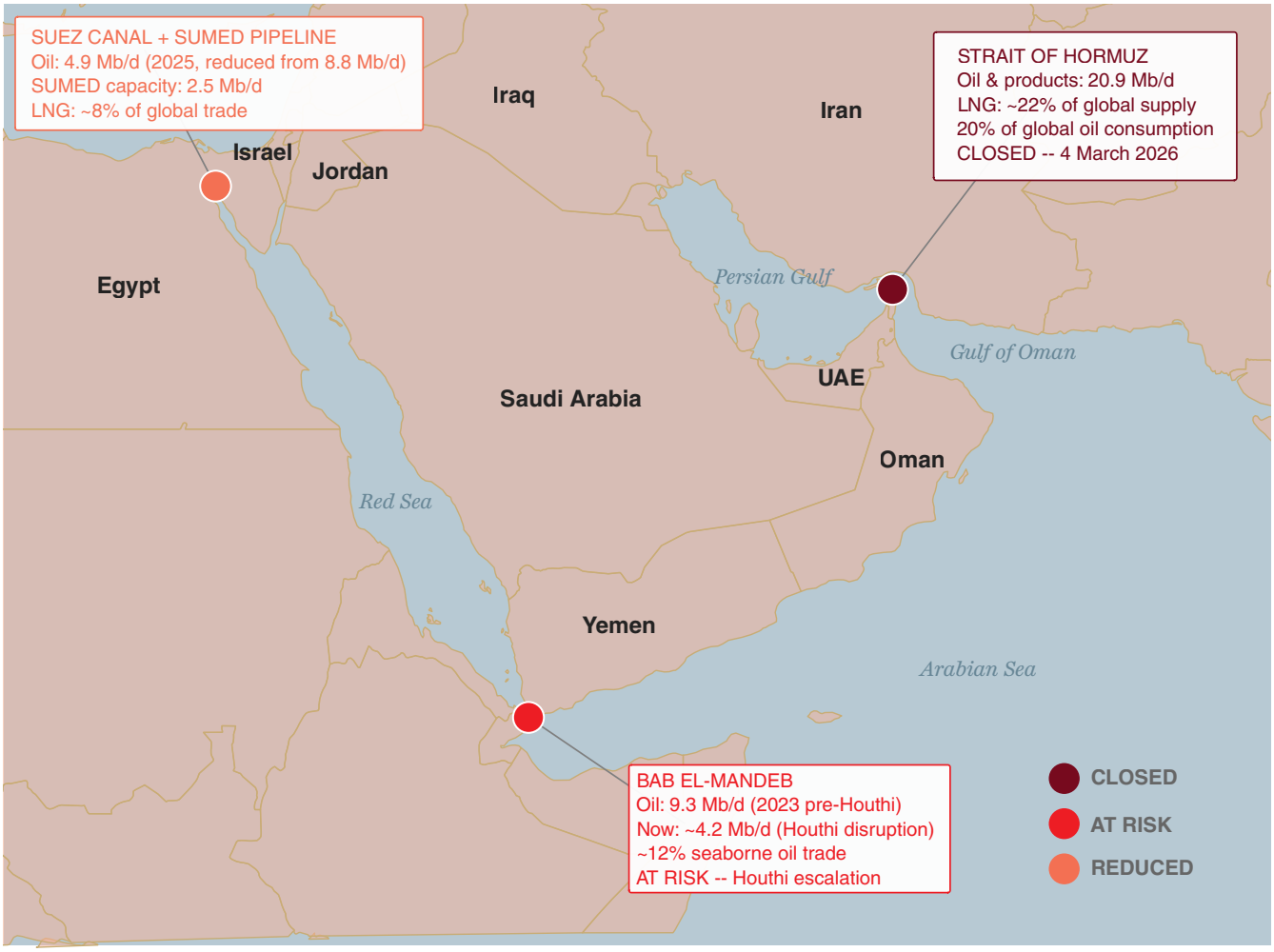
If the Iran war fully resumes, the economic shock it would cause would be greater than that of the Russia–Ukraine war.



Source: IMF WEO, Federal Reserve Board, Brookings, IEP Calculations

FIGURE 3.11

Global energy chokepoints



Source: EIA, Anadolu Agency, Rystad Energy

Beyond crude oil and LNG, Hormuz carries petrochemicals, fertilisers and helium. Gulf states account for approximately 45 per cent of global sulphur supply and 50 per cent of global urea exports. Qatar produces around 40 per cent of the world's helium, a critical input to semiconductor manufacturing.

When the crisis began, the world had very little spare oil production to draw on. OPEC+ countries had limited extra capacity, and Russia, Iran's main strategic ally, had little reason to step in and was already struggling to export its own oil under sanctions.[10] The United States and Japan tapped their emergency reserves, with Japan releasing 80 million barrels from mid-March, enough to cover about two weeks of its own demand. But with over 13 million barrels a day cut off, even the world's combined emergency reserves of more than two billion barrels would only last two to three months if the strait stayed closed. The head of the International Energy Agency called it the greatest energy security challenge in history.[11]

The Hormuz paradox

The closure of the Strait of Hormuz is pushing world oil prices higher while preventing Gulf exporters from cashing in on the spike. This is what makes the 2026 shock different from the disruption that followed Russia's invasion of Ukraine in 2022, when Russia was at least able to redirect its oil to willing buyers at a discount. Iraq, Kuwait, Qatar, Bahrain, and parts of the UAE have no such option. Higher oil prices, which would normally mean a windfall for producers, instead deepen their losses.

The energy trapped inside the Gulf is either unreachable because facilities have been destroyed, or unable to leave through the Strait. [12] The crisis has disrupted shipping and air traffic across the region, pushing up commodity prices, feeding into inflation expectations, and rattling financial markets as investors retreat from risk.

The simultaneous loss of liquefied natural gas, sulphur, urea and helium alongside crude oil means the 2026 shock is being felt through more channels than any comparable event in modern history. This is the Hormuz paradox, and it is the defining feature of how the crisis is spreading. The countries closest to the conflict are hit twice over: cut off from export revenues at the very moment their import costs rise and their infrastructure is being damaged.

Price and inflation impacts

The potential impact of the war on prices and inflation differs significantly in each scenario. A summary of Brent and TTF projections, inflation impacts, and historical comparators is shown in Table 3.6.

S1 corresponded to a short, contained shock with Brent averaging $85-90 per barrel. S2 places Brent at $95-115 per barrel with US headline inflation rising 0.5-0.6 percentage points,[13] and Eurozone inflation 1.0-1.5 points.[14] The WTI price already reached $113 per barrel in April, although it has since fallen marginally, consistent with S2 estimates. Under S3 Brent rises to $115-132 per barrel under sustained closure, with US inflation up 1.5-2 points and Eurozone inflation up 2-3 points, exceeding the 1973 embargo in intensity.[15]

Transmission Channels

The crisis is spreading out through four main channels: energy prices, trade and supply chains, financial markets, and remittances.

Energy prices

The closure cuts off over 13 million barrels a day from world markets, a shortfall without modern precedent.[16] One estimate from March 2026 suggests that a three-month closure removing a fifth of global supply would push US oil prices to around US$98 per barrel and shave 2.9 percentage points off annualised global growth in the second quarter of 2026.[17] Official US forecasts project Brent crude peaking at US$115 a barrel in mid-2026 before easing to US$88 by year-end and averaging US$76 in 2027, assuming the conflict ended in April. Other modelling suggests that a longer closure, with oil averaging US$140 a barrel for two months, would amount to a 'breaking point' that would push the Eurozone, the UK, Japan, and much of the rest of the global economy into recession.[18]

The impact on liquefied natural gas (LNG) is even sharper for some economies. Japan and South Korea, which rely entirely on imports, are facing acute shortages.[19] European gas storage was already low after a harsh winter, sitting at around 30 per cent capacity when the crisis began. European wholesale gas prices nearly doubled by mid-March, prompting central bankers to delay planned interest rate cuts and revise inflation forecasts upward. UK inflation is now expected to climb above five per cent in 2026.[20]

Trade and supply chains

The Strait carries more than oil and gas. Petrochemicals, fertilisers and general cargo also pass through it. Ships rerouting around southern Africa add roughly two weeks to delivery times, driving up freight rates and war-risk insurance premiums, some by more than tenfold.[21] Modelling across 65 countries suggests that every additional week of disruption produces income losses in developing countries that cannot be recovered later.[22]

Fertiliser shortages magnify the threat to food security. Around half of global urea and sulphur exports are at risk, with knock-on effects on farming costs across Sub-Saharan Africa and South Asia.[23]

Financial markets

Investors have rushed into safe assets such as gold, the Japanese yen and the Swiss franc, tightening financial conditions worldwide. Borrowing costs have risen across southern and eastern Mediterranean economies and in Türkiye. The Egyptian pound lost more than eight per cent against the US dollar in the first weeks of the conflict; the Zambian kwacha fell nearly five per cent. Under more severe scenarios, corporate borrowing costs could rise by one to two percentage points, with emerging-market governments facing significantly higher costs to issue debt through 2027.

Remittances

Workers in Gulf states send around US$88 billion home each year, with Egypt, Pakistan, Jordan, and India the largest recipients.[24] Egypt alone received US$41.5 billion in Gulf remittances in 2025. Within weeks of the conflict starting, foreign investors pulled around US$6 billion out of Egyptian markets, sending the currency sharply lower and forcing the central bank to step in.

TABLE 3.6

Price and inflation impact by scenario

If the war resumes, the projected impact will be higher than the 1973 oil embargo.

	S1 – war ends now	S2 – ceasefire / partial reopening	S3 – war resumes
Brent crude (annual avg)	$85–90/bbl	$95–115/bbl	$115–132/bbl
WTI peak (Q2 2026)	~$80/bbl	~$110/bbl	~$132/bbl
Dutch TTF gas (€/MWh)	€35–45	€55–70	€80–100+
US headline inflation impact	+0.3pp	+0.5–0.6pp	+1.5–2.0pp
Eurozone inflation impact	+0.5pp	+1.0–1.5pp	+2.5–3.5pp
Historical comparator	Below 1973 oil embargo	1979 Iranian Revolution level	Exceeds 1973 embargo

As construction and services across the Gulf grind to a halt, migrant workers are losing their jobs and returning home in large numbers. India had brought back more than 220,000 of its nationals from the Gulf by March 2026, a region that supplies nearly 60 per cent of its oil imports and more than US$125 billion in remittances each year. Egypt, Pakistan and Jordan each receive more than four per cent of GDP from Gulf remittances, losses that pile on top of the energy and trade shocks in the economies least able to absorb them.

Food shock

The food price channel works on two timescales. Immediately, higher oil prices raise transport and logistics costs. A 10 per cent increase in fuel prices raises food distribution costs by three to five per cent in import-dependent economies, with the burden falling on the poorest households, for whom food already takes up 50–70 per cent of income.[25]

After a six to nine month lag, the fertiliser shock reaches harvests. Gulf states supply roughly 45 per cent of global sulphur and 50 per cent of global urea, both stranded by the Hormuz closure at the very moment the Q2 2026 planting season opens across South Asia and East Africa.[26] Fertiliser shortfalls at planting produce food shortfalls at harvest, possibly extending crisis conditions into 2027.

GDP and infrastructure losses by country and Group

The economic impact is likely to be unevenly distributed, with certain groups of countries much more at risk of a significant fall in GDP. There are five groups of countries that are most likely to be impacted:

- Countries directly affected: Israel, Iran, and the Gulf states
- Regional neighbours to the directly affected countries
- Oil and gas exporters outside of the Gulf Region
- Developing economies that are energy importers and have high debt
- Advanced economies (excluding those in the groups above)

Table 3.7 outlines the economic impact to these countries under each of the three scenarios, as both a total and percentage of GDP.

TABLE 3.7

GDP losses by group, three scenarios

Outside of regional neighbours, developing countries that are energy importers face the biggest risk.

Country / Group	S1 %	S1 $B	S2 %	S2 $B	S3 %	S3 $B	GDP $B base (PPP)
Group 1 – Directly affected: Israel, Iran and Gulf states							
Iran	–3%	–53.5	–15%	–267.4	–25%	–445.8	~1,783.2
Israel	–2%	–12.2	–4%	–24.4	–7%	–42.7	~609.4
Saudi Arabia	–1.5%	–43.4	–3.0%	–86.8	–6%	–173.7	~2,894.6
UAE	–1.5%	–15.1	–3%	–30.2	–8%	–80.5	~1,006.3
Qatar	–4%	–14.3	–9%	–32.3	–15%	–53.8	~385.4
Kuwait	–2%	–5.7	–5%	–14.2	–10%	–28.3	~283.1
Iraq	–3%	–20.1	–4%	–26.8	–8%	–53.6	~670.5
Bahrain	–2%	–2.3	–5%	–5.8	–10%	–11.6	~115.9
Oman	–1%	–2.5	–2%	–4.9	–5%	–12.4	~247.4
Group 1 total	**–2.1%**	**–169**	**–6.2%**	**–493**	**–11.3%**	**–902**	**~7,969**
Group 2 – Regional neighbours: Jordan, Syria, Türkiye, Egypt, Lebanon							
Group 2	–0.5%	–34.1	–2%	–136.3	–4%	–272.6	~6,816
Group 3 – Net oil & gas exporters (outside Gulf)							
Group 3	0.50%	273.3	0%	0	–0.5%	–273.3	~54,653
Group 4 – Developing energy-importing economies (excl. Groups 1, 2 & 3)							
Group 4	–0.2%	–201.3	–0.5%	–503.3	–1.5%	–1,510.0	~100,663
Group 5 – Advanced economies (excl. Israel, US and Norway)							
Group 5	–0.1%	–52.0	–0.3%	–155.8	–1%	–519.4	~51,936
Global total	**–0.1%**	**–183.2**	**–0.6%**	–1,288.3	–1.6%	–3,477.5	~222,036

Group 1 faces the biggest impact relative to its size in every scenario, ranging from 2.1 per cent of GDP in the mildest case to 11.3 per cent in the most severe. Group 3 is the only group with a projected positive impact, and only under S1: a quick resolution allows exporters to cash in on higher prices while their own exports continue to flow. Under S2 the gain disappears, as a prolonged slump in demand cancels out the revenue boost. Under S3 the global recession takes over and Group 3 turns into a net loser as well. Groups 4 and 5 absorb the largest losses in raw dollar terms simply because of their economic size, but the impact relative to their GDP is modest. The geographic distribution under S3 is shown in Figure 3.12.

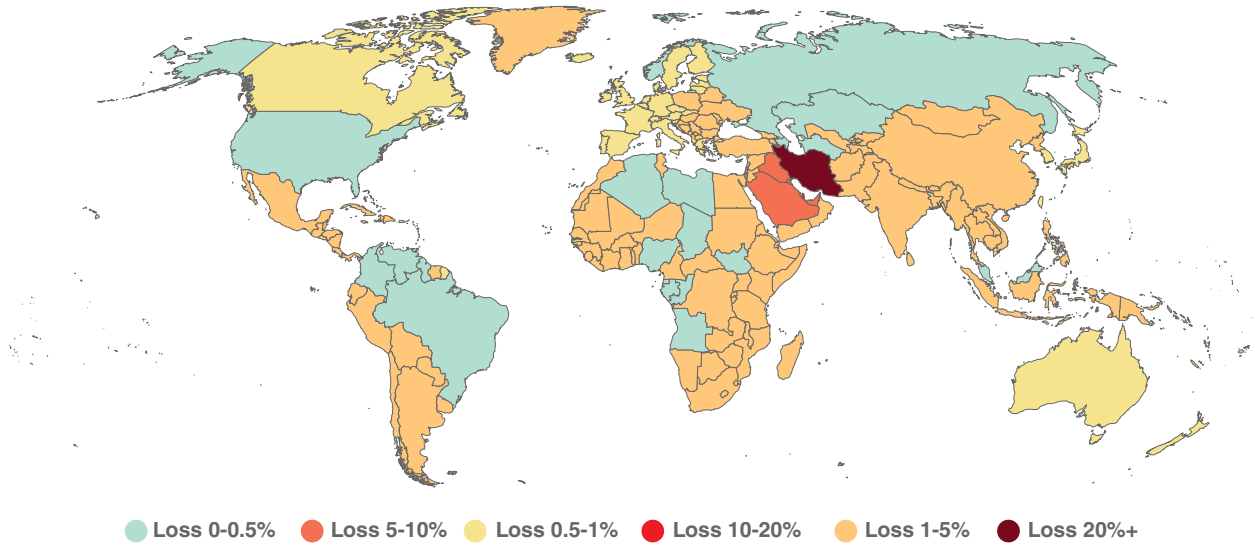
Infrastructure damage, directly affected countries

The countries directly affected by the war have also suffered significant infrastructure losses. Table 3.8 estimates the destroyed and severely damaged physical infrastructure across directly affected countries, covering energy facilities, military bases, ports and critical civilian infrastructure. The figures show replacement or repair costs for assets damaged so far. They do not include long-term reconstruction investment, lost future capital spending or knock-on economic costs.

FIGURE 3.12

Geographic distribution of GDP losses under Scenario 3

If the war resumes, almost every region in the world faces significant GDP losses.



Source: IEP Calculations
Note: The above map colors depicts estimated GDP loss and may not correlate with established national borders

TABLE 3.8

Infrastructure damage for directly affected countries

Country	S1 $B (war ends now)	S2 $B (ceasefire)	S3 $B (war resumes)	Key evidence
Iran	80–120	120–180	200–350	80+ facilities struck; one-third severely damaged; nuclear sites; 30+ warships sunk
Israel	10–15	15–25	30–60	NIS 35B (~$11.5B) total; $3B/week under red restrictions
Saudi Arabia	5–10	10–20	25–60	E-3 Sentry radar ($700M+); THAAD; Aramco precautionary shutdowns
UAE	3–6	6–12	15–35	Jebel Ali port, Fujairah terminal, Al Dhafra base, Dubai airport fuel depot
Qatar	15–20	20–30	35–60	17 per cent LNG capacity erased (~$20B revenue over 3–5 yrs)
Kuwait	2–4	4–8	10–20	Ali Al Salem base, Kuwait airport oil terminal damage; desalination facilities damaged
Iraq	3–5	5–10	12–25	Zubair field 400K–250K bpd; Basra terminals disrupted; estimated $3B/day loss
Bahrain	1–2	2–4	5–10	NAVCENT HQ struck; ALBA smelter disrupted; UAE $5.4B emergency swap
Oman	0.5–1	1–2	2–5	Limited confirmed damage; Iran denied attacks; precautionary port closures
Group 1 total	120–183	183–291	334–625	

Infrastructure damage is a separate category from GDP flow losses. The total of $183-291 billion under S2 is one-off capital destruction, not annual output forgone, and the two should not be added together. Iran figures should be treated as a conservative lower bound, since nuclear infrastructure has no civilian equivalent to price against and replacement costs are genuinely uncertain.

Global debt and fiscal stress

The Iran war energy shock is occurring at a time when global debt levels are at record peacetime highs. Global government debt stood at 93 per cent of world GDP in October 2025, higher than any year in the post-war era outside the COVID-19 emergency.[27] For many of the countries most exposed to the energy shock, the run of crises since 2020 has already used up the room governments would normally have to absorb a commodity price surge. Governments now face three pressures at once:

- higher spending from fuel and food subsidies as domestic prices spike
- falling revenues as import volumes drop and tax bases shrink[28]
- rising borrowing costs, particularly in emerging markets where governments saw their borrowing costs jump by roughly 0.5 per cent in the first weeks of the conflict[29]

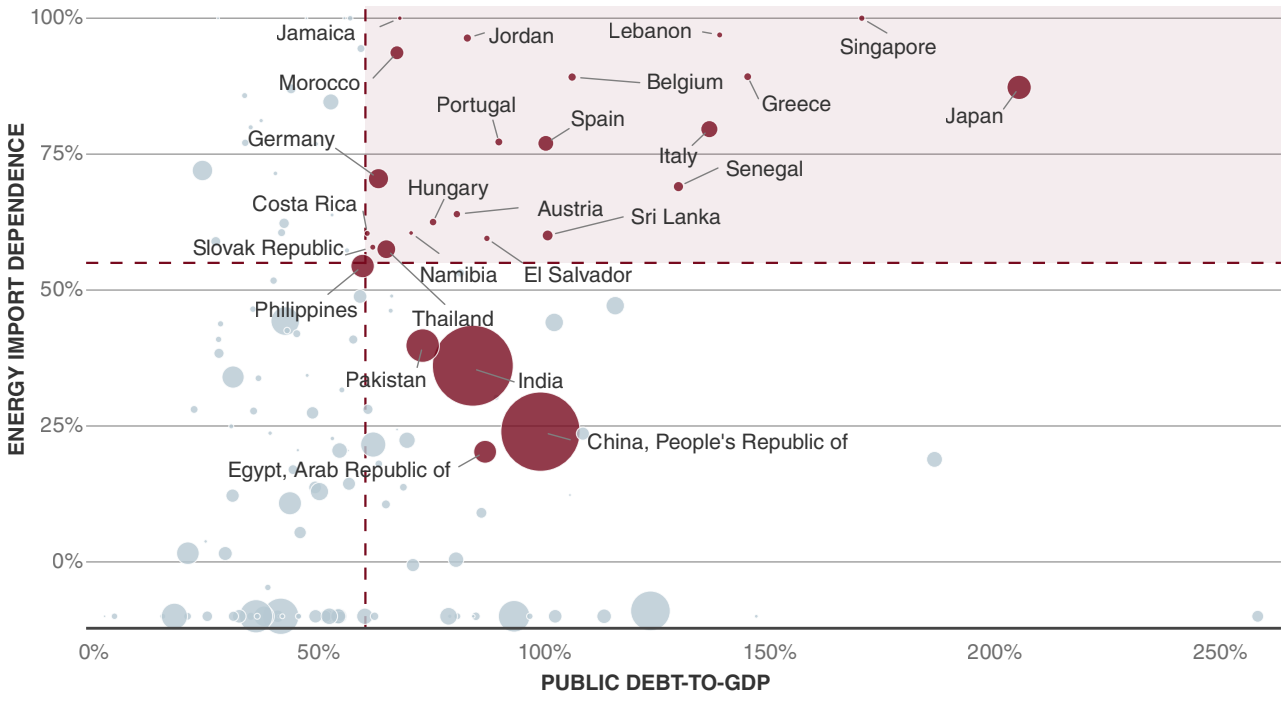
Debt vulnerability versus energy import exposure

Figure 3.13 shows the public debt-to-GDP ratio against energy import dependence.[30] Three developing economies are particularly at risk: Sri Lanka, with a debt/GDP ratio of 101 per cent and energy import dependence of 60 per cent faces a particularly high risk. Egypt and Pakistan carry high debt but lower energy-import dependence. All three are currently under IMF program conditions or in active discussions, sharply limiting their ability to run compensating deficits. From the advanced economies, Japan and Italy also face significant risk. Japan relies entirely on imported LNG and carries debt of roughly 128.9 per cent of GDP.[31] Italy's borrowing costs have risen relative to Germany's by enough to raise concerns about the stability of the Eurozone.[32]

FIGURE 3.13

Debt vulnerability vs energy import dependence

Countries with both high energy dependence and high levels of debt are especially at risk.



Source: IMF WEO, World Bank

Emerging markets under program pressure

Five country cases illustrate how the energy shock feeds into sovereign debt problems. Each entered the crisis with debt levels considered elevated or beyond what is sustainable, leaving them with little capacity to absorb a prolonged external shock.[33]

TABLE 3.9

Emerging market case studies

Sri Lanka **Debt/GDP: 101% | Energy import dependence: 60%**	
IMF program	$2.9 billion Extended Fund Facility (March 2023); third review completed January 2026.
Shock transmission	Sri Lanka imports virtually all of its petroleum. Retail fuel subsidies account for an estimated 0.8% of GDP in 2026.[34]
Fiscal impact (S2)	Energy import bill rises by an estimated $600–900 million, equivalent to 1.5–2.2 per cent of GDP, directly threatening the primary surplus target required under the IMF program.
Risk	Program failure risks a second default. Debt restructuring negotiations with China and Paris Club creditors remain unresolved as of April 2026.
Pakistan **Debt/GDP: 73% | Energy import dependence: 40%**	
IMF program	$7 billion Stand-By Arrangement (July 2024), fragile given political instability and deteriorating external position.
Shock transmission	Higher fuel costs, rising food prices, and Gulf remittance compression (~4–5 per cent of GDP) transmit simultaneously.
Fiscal impact (S2)	Estimated additional fiscal cost of 2–3 per cent of GDP. Public debt approaching IMF upper sustainability threshold.
Risk	Pakistan has been in continuous or near-continuous IMF engagement since 2019. Program failure would trigger market access loss and a balance-of-payments crisis.
Egypt **Debt/GDP: 87% | Energy import dependence: 20%**	
IMF program	$8 billion Extended Fund Facility (March 2024), requiring fiscal consolidation, exchange rate flexibility and subsidy reduction.
Shock transmission	Four channels at once: higher energy import costs; Suez Canal revenue collapse (transit fees fell about 60 per cent as shipping rerouted via the Cape of Good Hope); tourism earnings erosion; lower Gulf remittances ($41.5 billion in 2025).
Fiscal impact (S2)	Portfolio investors withdrew approximately $6 billion; the pound depreciated more than 8% against the dollar. Combined fiscal cost estimated at 3–4 per cent of GDP.
Risk	Egypt is the second-largest IMF borrower after Argentina. Program failure would require emergency multilateral support.

The developed economy trilemma

Advanced economies face a different but equally serious fiscal challenge. They enter the shock with generally manageable debt levels, with the notable exceptions of Japan, Italy, and France.[35] However, they face simultaneous pressure across three competing spending demands that cannot all be met with current budget constraints, as shown in Table 3.10.

The trilemma is most acute for the Eurozone's fiscally weaker members. Italy's debt servicing costs already exceed four per cent of GDP at current rates. A sustained period of energy-driven inflation that delays interest rate cuts would push that above 4.5 per cent by 2028 under S3.[40] Germany, which historically operated under a constitutional limit on borrowing, faced its own version: that limit had constrained the fiscal response when gas import costs are rising and defence commitments are expanding, though the constraint was relaxed in March 2025 to allow increased defence spending and infrastructure investment.[41]

For the United States, the trilemma is softened by reserve currency status, domestic energy production, and larger fiscal capacity. Even so, sustained higher oil prices contribute to a rebound in headline inflation, constraining the Federal Reserve and delaying rate cuts.[42] The US baseline budget projection from early 2026 already had a primary deficit of 2.6 per cent of GDP. Revenue shortfalls from the energy shock could add a further 0.3 to 0.5 percentage points under S2.[43]

The United States also faces a substantial refinancing challenge. Gross federal debt has reached $38.9 trillion, around 122 per cent of GDP, and the US Treasury Department must roll over close to $9.7 trillion of maturing debt in 2026 alone. Net interest payments will hit $1 trillion this year, equivalent to 3.3 per cent of GDP and now exceeding total defence spending. Recent auctions have shown weakening demand, with the bid-to-cover ratio on 10-year notes falling from 2.45 in March to 2.13 in May, and foreign participation declining from 74.5 per cent to 64 per cent over the same period.

Debt trajectories

The differing impact of the three scenarios is especially visible when looking at the impact on debt trajectories, as shown in Figure 3.14. The gap between S1 and S3 widens sharply from 2027. The first year of disruption locks in damage regardless of the scenario, but the compound effect of sustained high energy prices on interest costs and primary balances builds up over later years.

TABLE 3.10

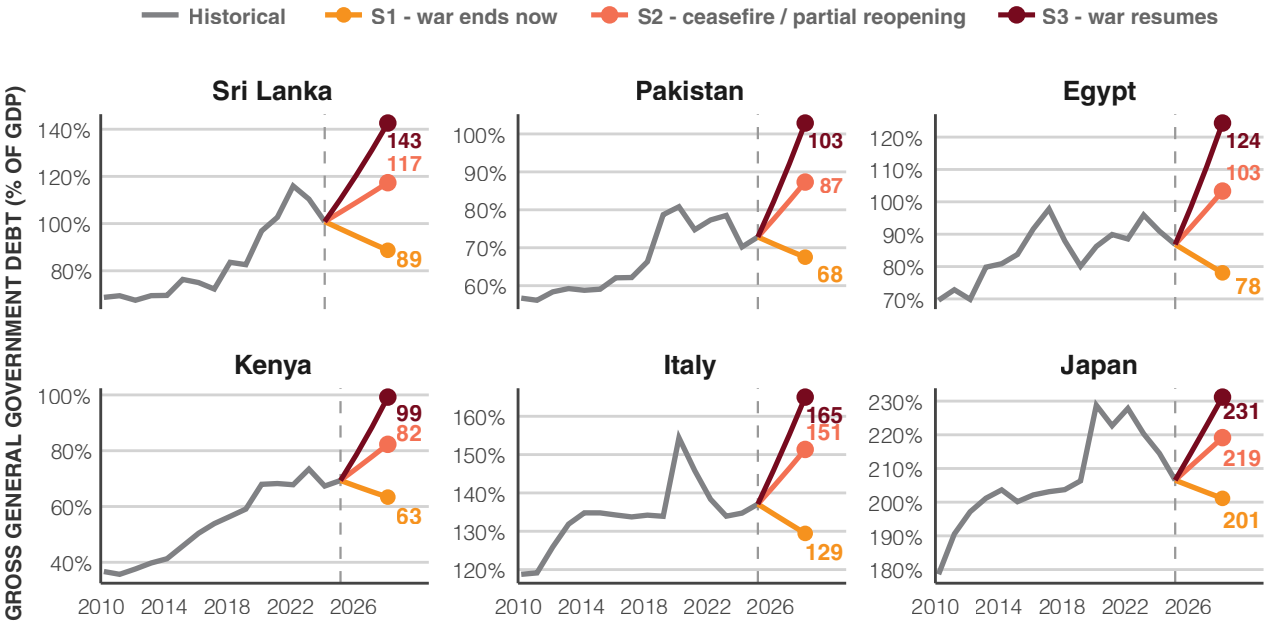
Pressures faced by advanced economies

Spending demand	Driver in 2026	Change without war	Interaction with energy shock
Defence spending	NATO two per cent commitment; Middle East contingency deployments[36]	+0.3–0.8pp annually	Direct competition for fiscal headroom; accelerated by active conflict
Energy transition	IRA, EU Green Deal; shock accelerates political urgency[37]	1.5–3 per cent of GDP through 2030	Requires capital at precisely the moment markets tighten[38]
Debt servicing	Rate cycle; $100+ trillion global public debt [39]	2–5 per cent of GDP	Rising inflation extends high-rate period; spreads widen for weaker sovereigns

FIGURE 3.14

Debt trajectories under three war scenarios

If the war resumes, the level of debt will increase significantly for many countries.



Source: IMF WEO historical database; IEP Projections

For Sri Lanka under S3, debt-to-GDP would approach 143 per cent by 2028, a level at which any IMF program becomes unworkable without writing off a large share of what creditors are owed.[44] Pakistan and Egypt would also cross the threshold at which the risk of a disorderly debt restructuring rises sharply.

Advanced economies such as Japan and Italy follow a different pattern from emerging market. Their existing debt levels are far higher, but their borrowing costs stay more stable. The main risk is that public debt crowds out productive investment over time rather than triggering immediate default.[45]

Impact on Fragile States

For the world's most fragile economies, the Iran shock is the latest in a long line of pressures, piling on top of fiscal exhaustion since COVID-19, unresolved debt problems, and chronic hunger. Energy shocks reach fragile states through three reinforcing channels. The first is the direct cost of importing energy, which rises immediately with oil and gas prices. The second is the food price channel, which works through fertiliser shortages and higher transport costs, taking six to nine months to come through. The third is fiscal compression, where higher import costs, rising borrowing costs and bigger subsidy bills strain governments that have little room to absorb them. Setting these three channels against IEP's Ecological Threat Register (ETR) and Positive Peace Index (PPI) shows which countries are most at risk of tipping into fragility in the second half of 2026.

The Ecological Threat Register measures the gap between a country's exposure to ecological stressors (food insecurity, water stress, climate hazards, population pressure) and its capacity to absorb them. A high ETR score signals that shocks will overwhelm a country without external support. The Positive Peace Index captures the eight pillars that sustain that capacity. Where high ETR risk meets a wide PPI deficit, the result is a fragility tipping point: the moment at which cascading failure across fiscal, food, governance and security systems becomes self-reinforcing.[46]

The closest historical parallel is 2022. The Russia-Ukraine grain and energy shock drove the global food price index to its highest recorded level and pushed approximately 22 million people across the Horn of Africa into severe food insecurity.[47] The 2026 Iran shock spreads through a wider range of commodities and arrives in a more fragile fiscal environment than 2022. The composite impact on fragile states is shown in the vulnerability heat matrix in Figure 3.15.

The highest composite scores as seen for Eritrea, Madagascar, Senegal and Zambia are driven less by energy import dependence than by the combination of a high Positive Peace deficit, high ETR risk and weak fiscal policy. A second tier of countries, such as Sri Lanka, Pakistan, Sudan, and Ghana sit just below these highest risk countries.

ETR scores are uniformly high across all fragile states reflecting a recurring finding that the institutional weaknesses captured by a low Positive Peace score drive both ecological vulnerability and fiscal fragility. Countries with the least capacity to manage the shock of the Iran war are the ones most exposed to it.

FIGURE 3.15

Vulnerability heat matrix, fragile countries

A high Positive Peace deficit and high exposure to ecological threat sharply raises the risk of a high economic impact from the war in Iran.

	Energy Imports Dep.	Food Security	Fiscal Policy	PP Deficit	ETR Score	Average Risk Score
Eritrea, The State of	3	4	4	5	4	4
Madagascar, Republic of	2	4	3	5	4	4
Senegal	4	3	4	3	4	4
Zambia	2	3	4	5	4	4
Cambodia	4	3	2	5	3	3
Sri Lanka	4	3	4	3	3	3
Pakistan	3	3	4	3	4	3
Sudan	2	4	4	3	4	3
Zimbabwe	2	4	3	4	4	3
Angola	1	3	3	5	4	3
Ghana	1	3	4	4	4	3
Moldova, Republic of	5	3	2	3	3	3
Mozambique, Republic of	1	4	4	3	4	3
Niger	2	4	3	3	4	3
Nepal	3	3	3	4	3	3
Rwanda	2	3	2	5	4	3
South Sudan, Republic of	1	4	4	3	4	3
Chad	1	4	3	4	4	3
Tanzania, United Republic of	2	3	2	5	4	3
Uganda	2	4	2	4	4	3
Yemen, Republic of	1	4	4	3	4	3
Bangladesh	3	3	2	4	3	3
Côte d'Ivoire	2	3	2	4	4	3
Congo, Democratic Republic of the	2	4	2	3	4	3
Congo, Republic of	1	4	2	4	4	3

1 Very low · 2 Low · 3 High · 4 Very High · 5 Critical

Source: World Bank, IEP Calculations

Country spotlights

Three cases illustrate distinct risk transmission pathways, as shown in Table 3.11. Bangladesh is an export-exposed energy importer where the shock transmits through industrial LNG costs and global demand compression. Egypt faces four simultaneous channels (energy, Suez Canal revenue, tourism and Gulf remittances) interacting with IMF conditionality. Pakistan represents the compound fragility case, where energy, food, remittance, and political shocks converge.

TABLE 3.11

Risk transmission pathways for Bangladesh, Egypt, and Pakistan

Bangladesh **Debt/GDP: 42% | Energy import dependence: 44%**	
Energy channel	LNG powers ~40 per cent of electricity generation. Import cost rises 1.5–2.5 per cent of GDP under S2/S3. Rolling power outages constrain garment production, 84 per cent of export earnings.
Food channel	Imports ~40 per cent of wheat. Global wheat prices up 18 per cent in Q1 2026. Urban households spend >55 per cent of income on food; rice prices up ~12 per cent by April 2026.
ETR / PPI	ETR: High (Tier 3). PPI deficit: Moderate. International financial support can still alter the S3 trajectory.
H2 2026 risk	LNG cost spike and export order compression push IMF program to breach. Food riots risk rises under S3.

Egypt **Debt/GDP: 87% | Energy import dependence: 20%**	
Energy Canal	Suez Canal transit fees fell ~60 per cent as shipping rerouted via Cape of Good Hope.[48] Pre-war revenue ~$9.4bn/year (~2.5% of GDP), a permanent fiscal shock while rerouting persists.
Remittances	Gulf remittances: $41.5bn in 2025 (~10 per cent of GDP). Estimated S2 compression: $2–4bn. Foreign investors withdrew ~$6bn; pound depreciated >8 per cent against the dollar.
Food security	World's largest wheat importer (~13mn tonnes/yr). Government subsidises bread for ~70mn people; subsidy cost rises $600–900mn under S2. Reform politically impossible during conflict.
ETR / PPI	ETR: High (Tier 3). PPI deficit: Significant on government and information pillars. The 2011 Arab Spring was triggered by bread prices, a structural constraint on subsidy reform.
H2 2026 risk	Under S3: second debt default risk rises to probable; emergency multilateral support required; mass food insecurity.

Pakistan **Debt/GDP: 73% | Energy import dependence: 40%**	
Energy channel	Net energy import dependence: 45 per cent. Circular debt in the power sector, already PKR 2.4 trillion, expands as distributors cannot pass through cost increases.
Remittances	Gulf remittances: 4–5 per cent of GDP. ~100,000–180,000 Pakistani workers displaced from Gulf employment by April 2026, simultaneously compressing inflows and raising domestic unemployment.
Food channel	Net wheat importer in poor harvest years; 2026 Rabi crop yields 8–12% below target. Food inflation running at ~28 per cent year-on-year as of March 2026.
ETR / PPI	ETR: Very High (Tier 4). PPI deficit: Large. Near-continuous IMF engagement since 2019. Estimated probability of program failure exceeds 60 per cent under S3.
H2 2026 risk	Under S3: balance-of-payments crisis; market access loss; cascading food and fuel shortages; elevated conflict risk.

There are also three major risk windows concentrated in the second half of 2026:

- In July and August, the Q2 fertiliser shortages impact harvests across South Asia and East Africa, while IMF program reviews fall due for Bangladesh, Kenya, and Ghana, countries that have already breached fiscal targets and now face renegotiation as food price pressure peaks.
- In September and October, global humanitarian agencies run out of room to stretch a $3.8 billion funding shortfall, forced to choose between maintaining existing rations and extending coverage to newly food-insecure populations.[49]
- In November and December, Pakistan ($1.9 billion), Egypt ($2.3 billion), and Kenya ($0.9 billion) face large external debt maturities. Under S2, rolling these over at manageable rates is uncertain for all three, under S3, it is effectively impossible.

The pile-up of IMF reviews, harvest outcomes and the sovereign debt rollover window in the last half of 2026 represents a concentration of risk without recent precedent.

Conclusion

The 2026 Iran war's aggregate impact on global GDP, estimated at 0.6 per cent of world output under the most likely scenario, looks smaller than the Global Financial Crisis, the COVID-19 pandemic, or the Ukraine war when viewed in headline terms. However, the headline understates the shock. The Iran war is defined by an unusual geographic concentration, the way different channels of disruption interact, and by the pre-existing fragility of the economies that bear most of the burden.

The Hormuz paradox, that the closure raises world oil prices while preventing Gulf exporters from cashing in on the spike, has no precedent in the post-war history of oil shocks. Every previous shock produced winners among exporters even as it imposed costs on importers. The countries closest to the conflict this time are hit twice over, cut off from export revenues at the very moment their import costs rise and their infrastructure is damaged.

Tight fiscal positions make the imbalance worse. Developing economies that import their energy entered the crisis with debt levels built up since COVID-19 that have used up the room they once had. In earlier shocks, governments could absorb a commodity price surge by running larger deficits for a while. That option is no longer available. For Sri Lanka, Pakistan, Egypt, Ghana, and Kenya, the energy shock raises spending demands, cuts revenues, pushes up borrowing costs and threatens the IMF program conditions that are, for many, the last line of defence against default.

The food transmission lag extends the crisis into 2027 which is not included in this analysis. Fertiliser shortages from the Q2 2026 planting season will impact harvests across South Asia and East Africa in the second half of 2026. This is the same window in which sovereign debt maturities fall due for Pakistan, Egypt, and Kenya. The pile-up of these pressures in the six weeks between November and December 2026 is a massive concentration of risk.

The economic case for de-escalation is clear. Under S2, the annual GDP loss is roughly $1.3 trillion. Under S3, that loss rises to roughly $3.5 trillion. The gap between scenarios, around $2.2 trillion in a single year, is the dollar value of diplomacy. It is also the cost of inaction measured not only in lost output but in political stability, food security, and the long-run integrity of the international economic order.

BOX 3.2

Calculating the impact of the war in Iran

The model is based on the IMF's April 2026 World Economic Outlook report and where the IMF has not published a country-specific figure, or where its assumption about the length of the war does not match the scenario being described, other published estimates are used. To produce its forecasts, the IMF uses a global economic model that traces how a shock in one part of the world spreads to every other part. The main inputs are oil and gas prices, the amount of oil kept off the market by the closure of the Strait of Hormuz, the cost of rerouting trade, financial market stress, exchange rate movements, and central bank responses. The model also factors in each country's energy imports, government debt, and exposure to global financial conditions. Where the IMF has not published a country-specific figure, or where its assumption about the length of the war does not match the scenario being described, other published estimates are used.

The model captures the percentage of economic output lost in 2026 due to conflict, providing a measure of the short-term impact across all sectors. These estimates should be considered conservative. The Iranian economy, for example, would have contracted by double digits even had hostilities ended in April. The figures also reflect only the short-term impact felt within 2026 and exclude a range of longer-term effects, including the future viability of the Strait of Hormuz as a trade route, sustained shocks to global fertiliser, fuel and petrochemical supplies, food price disruptions, and impacts on sovereign debt markets.

Scenario 1, War Ends Now

This scenario estimates the damage if the war had stopped on the day of the cut-off, which is 8 April 2026 when the ceasefire began. The starting point is the IMF's January 2026 forecast, the last picture of the world economy before the war began. From this baseline, the damage already done in the first 47 days of fighting is subtracted, because destroyed facilities, bombed sites and missile damage cannot be undone by a ceasefire. For Israel and Iran, the size of that locked-in loss is scaled up from the short 12-day war of 2025, which cost around 1 per cent of GDP. For Gulf oil producers, losses are smaller where a backup pipeline exists (Saudi Arabia and the UAE) and larger where it does not (Kuwait, Bahrain, Iraq, Qatar). For the rest of the world, the loss is set at about a quarter of the Scenario 2 figure, since a quick ceasefire prevents wider effects from taking hold. Oil and gas exporters outside the Gulf gain in this scenario, as the brief war pushes prices up but they can still get their oil to market.

Scenario 2, Ceasefire and Partial Reopening

This is the central scenario. For each country, the IMF's April 2026 estimate is used where available. The IMF reports its numbers as changes in expected growth, so they are converted into a GDP loss by comparing the new growth rate to the pre-war forecast. For example, Saudi Arabia was expected to grow by 4.5 per cent and is now expected to grow by 3.1 per cent, giving a loss of 1.4 per cent. For Iran, the scenario reflects the US naval blockade that began on 13 April. Iran cannot export oil, which normally provides about a quarter of its income, costing it around $435 million a day. Combined with damage to refineries and nuclear sites, the total Iranian GDP loss is around 15 per cent. Developing countries that import their energy are estimated to lose slightly more than the IMF average, reflecting that poorer countries are hit harder by oil price shocks.

Scenario 3, War Resumes

This is the worst-case scenario, in which talks collapse and fighting starts again. Estimates are anchored to the IMF's most severe forecast from April 2026, which assumes the Strait of Hormuz stays closed for the remainder of 2026. The damage is not simply double the Scenario 2 figure, because each extra month of war causes more harm than the month before: debt distress, food shortages and financial panic feed on each other. For developing countries, the loss reaches 1.5 per cent of GDP, including a sharp drop in money sent home by migrant workers as Gulf construction and services jobs disappear. For wealthy economies, the loss reaches one per cent of GDP, enough to push the Eurozone, the UK, and Japan into recession and to stall growth in the United States for the second half of 2026.

The number of countries involved in at least one external conflict in the previous five years has risen from 59 in 2008 to 103.

The spread of conflict is not automatic. Whether a war crosses a border depends on specific mechanisms and on the resilience of neighbouring states.

The factors that drive the spreading of conflict can be divided into three categories: material factors that move people such as weapons and money, relational channels of ethnic kin, sponsorship, and ideology; and factors such as state capacity.

The Horn of Africa is no longer a set of separate conflicts. The conflicts in Sudan, Ethiopia, Eritrea, South Sudan, and Somalia are now interlocked through every channel that causes conflicts to spread.

The Iran war is a force multiplier for the spread of conflict. It has amplified existing pathways by raising prices in import-dependent states, distracting Gulf countries who are supporting conflict, and highlighting the strategic importance of Red Sea ports.

The number of conflicts is at its highest point since the end of World War II, with 61 active state-based conflicts in 2024, with the number having doubled in the last 15 years. The expansion has been driven almost entirely by internationalised intrastate conflicts, which have increased by more than 175 per cent since 2010.

There were 20 countries that recorded at least 1,000 deaths from conflict in the past year. Many of these conflicts are entangled with other conflicts or countries beyond their borders, as seen in the Democratic Republic of the Congo, Burkina Faso, Pakistan, and Sudan.

Drug economies (US$)

2015	2024
14 billion	59 billion

Some of these mechanisms have increased significantly in recent years. Drug economies in conflict zones have quadrupled in a decade, from US$14 billion in 2015 to US$59 billion in 2024. The size of the drug economy in Myanmar alone increased from US$10 to US$35 billion over the past decade.

The Sudanese civil war is the world's most severe humanitarian crisis, with over 12 million people displaced. The influence of external actors and illicit economies has increased the severity of the conflict.

Self-financing makes the war in Sudan difficult. The RSF's gold revenues mean that withdrawing external sponsorship would not stop the fighting, and the rising gold price to over US$5,000 per ounce increases the incentives to continue the conflict.

4

How Conflicts Spread

Introduction

Many modern wars do not stay where they started. Prominent conflicts that have arisen in the last decade, such as those in Sudan, Ethiopia, and across the Sahel, have not remained self-contained domestic crises. Each is embedded in a regional network of refugee flows, sanctuary territory, weapons pipelines, financing channels, and external sponsorship that links multiple states into a single conflict system. Understanding these wars increasingly means understanding how they connect to their neighbours.

The risk of conflicts spreading has been exacerbated by three structural shifts:

- There are more conflicts in more places than at any point since World War II, and the death toll from conflict has risen accordingly.
- Conflicts are less likely to end in decisive victories or peace agreements.
- New technologies are lowering the barrier to participation for state and non-state actors alike.

The total number of state-based armed conflicts is now at its highest level since the end of the Second World War. There were 61 active state-based conflicts in 2024, almost double the number from 15 years before. The expansion has been driven almost entirely by one conflict type. The number of internationalised intrastate conflicts has increased by more than 175 per cent since 2010, while interstate and purely intrastate conflicts have changed little, as shown in Figure 4.1.

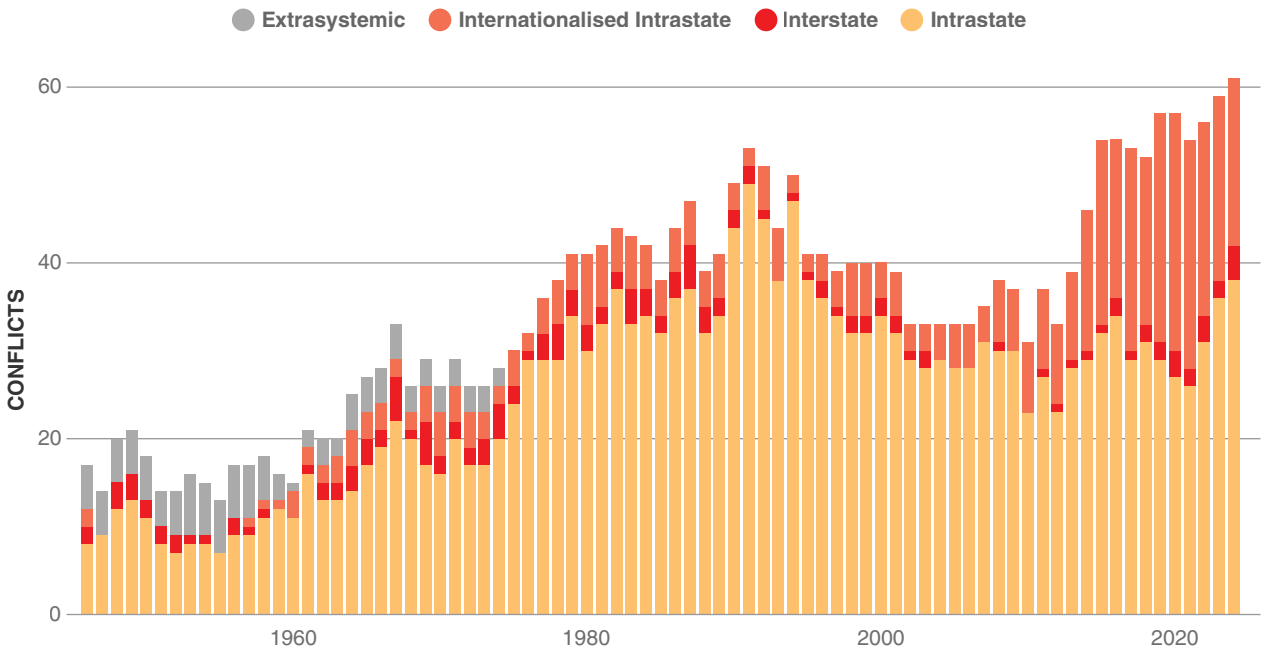
The *external conflicts fought* indicator has deteriorated by 63.5 per cent since 2008, the second-largest deterioration of any GPI indicator since the inception of the Index. The number of countries involved in at least one external conflict in the previous five years has risen from 59 in 2008 to 103 in the 2026 GPI, with some conflicts involving five or more external actors. Third-party support for civil wars has become increasingly common, and the average number of conflict dyads, or opposing pairs of armed actors, per state-based conflict has nearly doubled since the 1950s. Each new actor adds its own incentives, financing streams, and external constituencies, making any settlement harder to reach.

The expansion in the number of conflicts has been accompanied by a sharp rise in fatalities, as shown in Figure 4.2. Conflict-related deaths have increased by more than 530 per cent since 2008, peaking at over 309,000 in 2023 and standing at just over 181,000 in 2025. The *deaths from internal conflict indicator* recorded its largest annual deterioration since the inception of the Index on the 2026 GPI, with 20 countries each recording more than 1,000 deaths from internal conflict in the past year. The compounding wars in Sudan, Ukraine, Gaza and the Sahel have driven most of the increase.

FIGURE 4.1

Number of state-based conflicts by type, 1946–2024

The total number of state-based conflicts is now higher than at any point since World War II, driven by the rise of internationalised intrastate conflict.

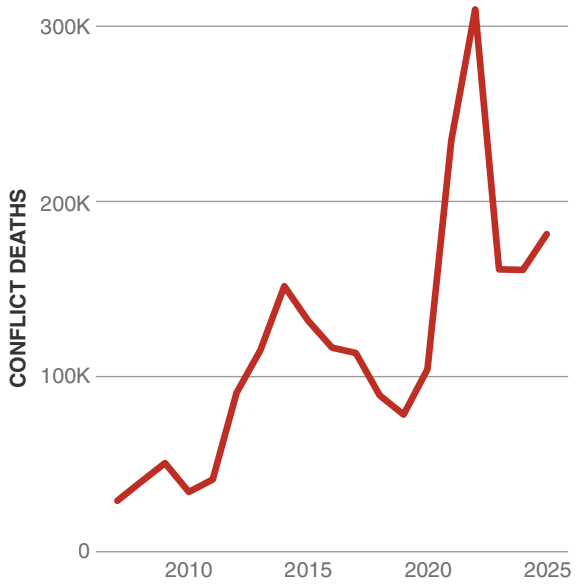


Source: UCDP Armed Conflict Dataset v25

FIGURE 4.2

Total conflict-related deaths, 2007–2025

Conflict-related deaths have risen sharply since 2010, peaking in 2023.



Source: UCDP GED v25

These rising death tolls are spreading across more countries than the international system can manage. There are now an average of 25 active major conflicts each month, alongside roughly 20 minor ones, while the major powers historically responsible for managing crises are stretched across Ukraine, the Middle East, and the Indo-Pacific. Global expenditure on peacebuilding and peacekeeping by the UN and OECD countries was US$47.2 billion in 2024, just 0.5 per cent of total military spending and a 26 per cent real-terms decline since 2008. As of 2025, there were over 117 million people forcibly displaced globally. The deeper a conflict embeds in a regional system, the larger the population exposed to its second-order effects.

As the number of conflicts continues to rise, the historical mechanisms for ending wars are no longer working as effectively, as shown in Figure 4.3. The share of state-based conflicts ending in clear victory by one side has fallen from 49 per cent in the 1970s to roughly nine per cent in the 2010s, while the share ending in a peace agreement has fallen from 23 per cent to about four per cent. The dominant outcome is now low-activity termination: a conflict slipping into dormancy without a negotiated settlement, leaving the underlying grievances in place and ready to reignite.

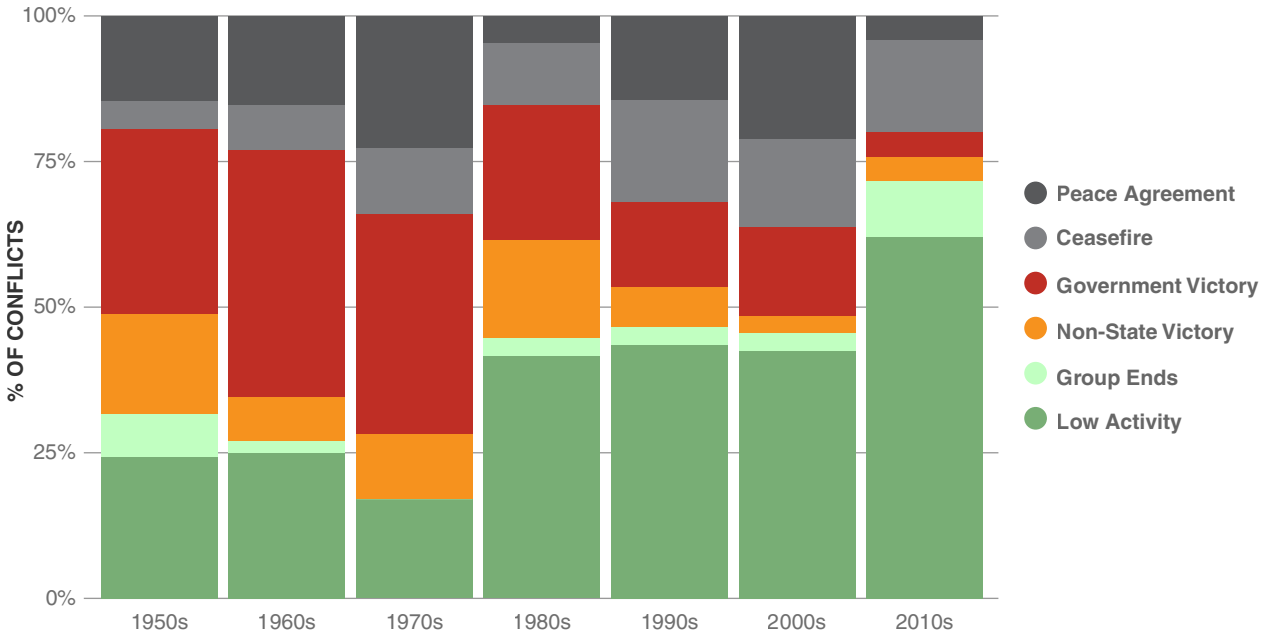
This shift coincides with the move away from the post-Cold War unipolar moment, when settlements were typically backed by US-led diplomatic and material guarantees. With influence now divided among a more competitive set of state sponsors, no single coalition can impose terms or keep the peace. Regional powers including Türkiye, the United Arab Emirates (UAE), Iran, Saudi Arabia, Egypt, and Russia have intervened with enough force to deny each other victory, but never with enough unity to force a settlement. The result is a class of 'forever wars' in which prolonged stalemate has replaced resolution.

Many of today's combatants are also at least partly self-financing, drawing on illicit drug economies, gold smuggling, mineral concessions, and protection rackets. As later parts of this section show, the value of illicit drug economies across five

FIGURE 4.3

How conflicts end, 1950s–2010s

The share of conflicts ending in a peace agreement has fallen from 23 per cent to about four per cent over the past 60 years.



Source: UCDP Conflict Termination Dataset, IEP Calculations

major conflict-affected states quadrupled between 2015 and 2024, blunting the leverage of any external party that might otherwise have pushed for a deal.

Layered onto these structural changes is a technological transformation. Cheap commercial drones, encrypted communications, satellite imagery, and increasingly capable cyber tools have lowered the cost of contesting state forces, especially for non-state actors and smaller states. Between 2018 and 2023 the number of states using armed drones rose from 16 to 40, while the number of non-state groups committing at least one drone attack rose from six to 91, an increase of more than 1,400 per cent. Recorded drone strikes rose more than tenfold over the same period.

Current conflicts confirm this is not a marginal trend. Ukraine is on track to produce more than a million drones a year and has created a dedicated drone military branch. In March 2026 Russia recorded around 34,000 casualties, with Ukrainian sources claiming that almost all were caused by drone attacks.[1] Houthi forces have used commercial drones and missiles to disrupt Red Sea shipping. Myanmar's resistance movements have used cheap drones against a far better-equipped junta. AI-enabled targeting is increasingly part of strike chains in Ukraine and Gaza. Encrypted messaging and crypto-asset transfers have made cross-border financing harder to detect. In aggregate, these tools make it cheaper and faster for armed actors to project force across borders, expanding the range of mechanisms through which a domestic conflict can spill into a regional one.

Taken together, these shifts have made conflicts more common and harder to end than at any point in the last two decades. Conflicts are now more likely to draw in external support, involve advance weaponry, link into transnational financing networks, and persist long enough to generate the refugee flows, weapons surpluses and demonstration effects that pull neighbouring states toward instability. The same forces that make individual wars more devastating also make their spread across borders more likely and more consequential.

The Drivers of Conflict Spread

Modern armed conflict rarely stays within a single country. Many existing conflicts are embedded in regional networks of refugee movements, cross-border kinship, foreign sponsorship, illicit finance, and ideological affiliation. The footprint of a contemporary civil war routinely extends well beyond the country in which fighting takes place. The peacefulness of neighbouring states is now shaped largely by events those neighbours do not control.

Early studies of how conflicts spread treated geographic clustering as evidence of automatic 'spillover', comparing the spread of conflict to a medical infection. That framing no longer holds. The spread of conflict is neither inevitable nor driven by a single cause. It results from identifiable mechanisms, shaped by the strategic choices of states, armed groups, displaced populations, and ideological networks, and by how permissive the surrounding environment is. Whether a given conflict spreads depends on which mechanisms are activated, on the density of cross-border ties, and on the institutional resilience of neighbouring states.

This section examines the spread of conflict in three ways. The first sets out a typology of nine mechanisms of conflict spread, organised into three categories: material channels, relational channels, and conditioning factors. The second applies the typology to the Horn of Africa, where every mechanism is operating simultaneously in real time. The Horn is the clearest contemporary example of conflict spread as a regional system. The third part examines the US and Israeli military campaign against Iran, and the likely impact this large external stress will have on conflict spread in the Horn of Africa.

Mechanisms of Conflict Spread

The factors that drive the spatial spread of civil wars since 1945 fall into three categories:

- Material factors move people, weapons, money, and fighters across borders.
- Relational factors link armed actors, ethnic groups and states to one another through ties that pre-exist any specific conflict.
- Conditioning factors, including state capacity, institutional quality and prior experience of contention, determine how vulnerable a given environment is when material and relational channels are activated.

The relative weight of these mechanisms varies by conflict type, regional context, and time. Physical spillover is concentrated among neighbouring countries, while informational and cultural channels can operate globally. Conflict spillovers are robust in Africa but less so elsewhere. The structural preconditions for conflict spread, such as porous borders, dense ethnic networks and weak state capacity, are regionally concentrated.

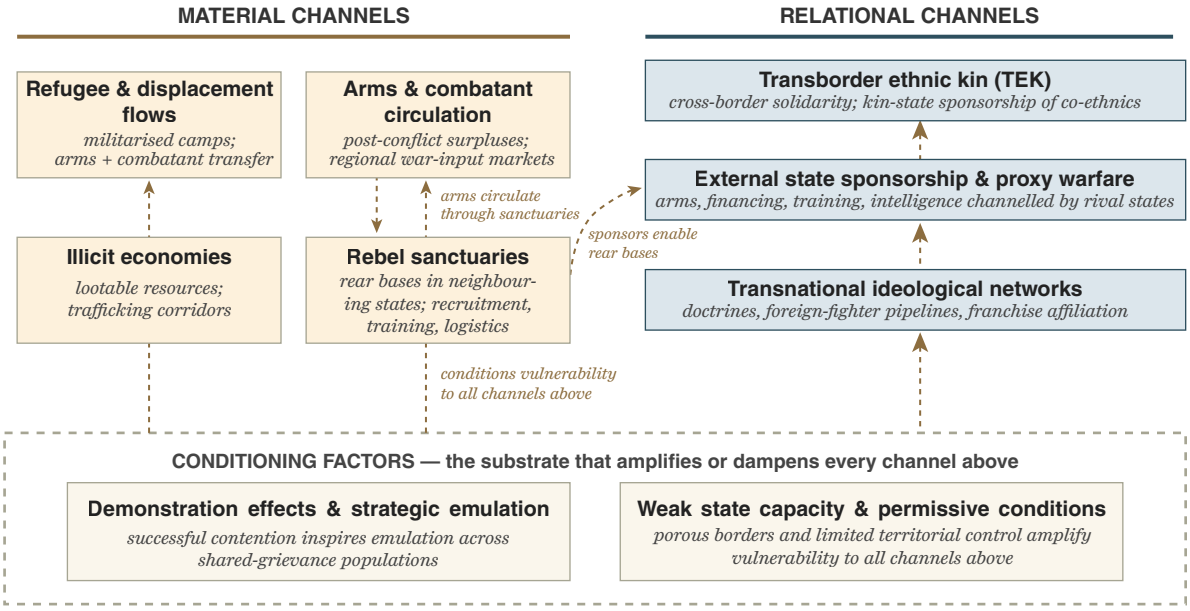
Different mechanisms also peak at different times. Refugee and arms flows generate rapid spillover during active fighting. The post-conflict diffusion of surplus weapons and demobilised fighters can raise regional risk for years after a conflict ends. No single mechanism dominates universally. These patterns emerge from multiple pathways interacting. Their relative importance depends on the specific conflict, the cross-border ties involved and the resilience of neighbouring states.

The nine mechanisms are summarised in Figure 4.4. A full reference table, including key sources and post-2000 illustrative cases for each mechanism, is provided in Appendix C.

FIGURE 4.4

Typology of conflict-spread mechanisms

There are two families of active channels for the spread of conflict (one material and one relational) which operate within a substrate of conditioning factors.



Dashed arrows: cross-family reinforcement loops. Upward dotted lines: conditioning effect on active

Material factors

Refugee and Displacement Flows

Refugee inflows raise the probability of civil conflict onset in host states. The reason is not that refugees are themselves violent, but that mass displacement opens channels through which arms, fighters and political mobilisation move across borders.[2]

The clearest example is the Great Lakes region of central Africa. After the 1994 Rwandan genocide, more than one million Hutu refugees, including former perpetrators of the genocide and ex-soldiers of the Rwandan army, established themselves in camps in eastern Zaire (now the Democratic Republic of the Congo). They used those camps as bases to launch cross-border raids into Rwanda. The militarisation of the camps directly triggered Rwanda's 1996 invasion of Zaire and the regional conflagration that followed in the First and Second Congo Wars, which drew in Uganda, Angola, Zimbabwe, and others. The dynamic has persisted for three decades. The Democratic Forces for the Liberation of Rwanda, which descended from the Hutu militia forces, continues to operate from eastern DRC today.

Arms and Combatant Circulation

The end of one conflict often marks the start of another. Wars produce surpluses of weapons, trained fighters, and military entrepreneurs whose livelihoods are tied to the continuation of violence. When a conflict ends, those resources circulate regionally.[3] The collapse of the Libyan state in 2011 produced the most dramatic illustration in recent decades. Stockpiles from the Gaddafi regime, including portable surface-to-air missiles, heavy machine guns and anti-tank missiles dispersed across the Sahara through existing smuggling networks. The weapons reached armed groups in Mali, Niger, Nigeria, and Chad, and as far afield as the Sinai Peninsula and Gaza.[4]

The 2012 Mali crisis was a direct product of this post-conflict diffusion. Tuareg fighters returning from Libya brought not only weapons but also military expertise and organisational capacity, transforming a long-running grievance into rapid territorial conquest. Weak control at borders also creates regional markets for 'war inputs' such as arms, mercenaries, and logistics that can spill over between conflicts.[5] The Sahel illustrates the pattern. The insurgency that began in northern Mali in 2012 progressively expanded into central Mali, then Burkina Faso and Niger, exploiting the same ungoverned spaces, porous borders and regional arms markets.

Illicit Economies

Illicit economies create self-sustaining incentives for armed violence to expand territorially, often independent of any political programme or external sponsor. Lootable resources such as alluvial diamonds, coltan and gold are valuable, easy to extract and easy to transport. They give rebel groups financing that extends both the duration and intensity of conflict.[6] Participation in illicit economies also changes how armed groups relate to local populations and cross-border networks. Groups that sponsor drug cultivation or artisanal mining distribute economic benefits to civilians, building political capital that strengthens their territorial control and makes conflict resolution harder.[7]

The diffusion mechanism operates through three channels. First, transnational trafficking corridors create geographic pathways along which armed groups expand. For example, starting in the mid-2000s, Latin American cartels routed cocaine through West Africa to European markets, exploiting weak law enforcement in Guinea-Bissau, Guinea, and Mali. Profits from transit taxation and protection payments flowed to affiliates of al-Qaeda in the Islamic Maghreb (AQIM) and to Tuareg factions in northern

Mali. New armed groups entered the trade, and violence spread as those groups competed for control over smuggling routes.

Second, artisanal mining of high-value minerals creates localised conflict zones that draw in cross-border armed actors and link to global supply chains. Eastern DRC is the clearest example. The FDLR, Mai-Mai factions, M23, and others have systematically exploited artisanal mining of coltan, cassiterite, wolframite and gold in the Kivus.[8] These minerals flow through regional trading networks into Rwanda, Uganda, and Burundi, connecting localised violence to global electronics supply chains.[9]

The economic rents from mining create powerful incentives for armed groups to maintain territorial control over mining sites, resist demobilisation and attract fighters from across the region. The dynamic operates as a diffusion mechanism in two ways. Firstly, it pulls external armed actors into territories where they would otherwise have no presence. Secondly, it enables the same cross-border trading networks that monetise the minerals to facilitate the movement of arms and fighters.

The crime and conflict nexus produces hybrid actors whose control of territory follows trafficking routes rather than ethnic or political boundaries. Myanmar is the world's largest methamphetamine producer and the second-largest opium producer. The result is a layered conflict landscape in which ethnic armed organisations, including the United Wa State Army (UWSA), the Shan State Army, and many smaller groups, derive substantial revenue from production and trafficking. The revenues sustain armed capacity, enable groups to resist central government authority, and create cross-border operational links with trafficking networks in Thailand, Laos, China, and India. Since the 2021 military coup, the crime and conflict nexus has deepened sharply, and the military junta itself has been implicated in facilitating criminal markets to sustain its war effort.[10]

Colombia is another example. After the 2016 peace agreement with the Revolutionary Armed Forces of Colombia (FARC), dissident factions that rejected demobilisation expanded into Venezuela. They exploited the collapse of Venezuelan state capacity to set up cocaine production and trafficking, which now sustain an armed presence on both sides of the border.[11]

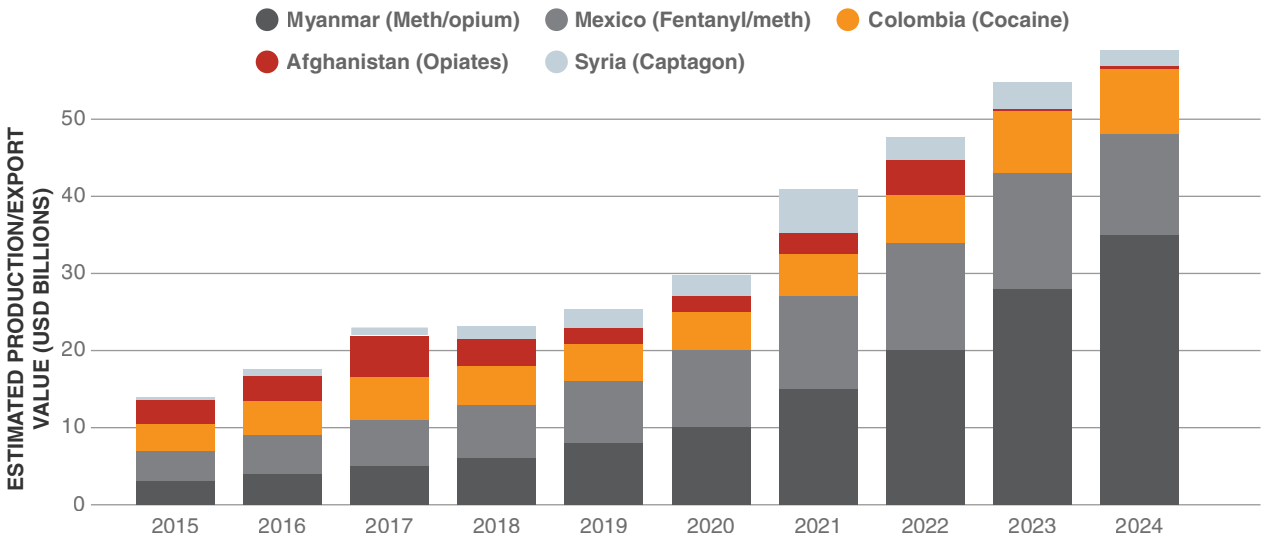
Conflict economies can also be mobile. During the Syrian civil war, the Assad regime became the largest producer of Captagon, a synthetic amphetamine that has become widespread in the Middle East. The British government assessed that the Syrian regime was responsible for 80 per cent of global Captagon trade, with a value approximately three times that of Mexican cartel trade combined.[12]

Figure 4.5 shows the estimated production-level value of illicit drug economies across five major conflict-affected states from 2015 to 2024. The aggregate value more than quadrupled over the decade, rising from approximately US$14 billion in 2015 to US$59 billion in 2024. Although the overall total has increased, the makeup varies substantially, with some experiencing large increases and others experiencing sharp reductions. Myanmar is the most striking case. The estimated value of methamphetamine and opium production there increased by 250 per cent between 2020 and 2024 alone, from US$10 billion to US$35 billion. The driver was the expansion of methamphetamine manufacturing in Shan State after the February 2021 coup, which shattered state governance and enabled organised-crime networks to scale production to unprecedented levels. By 2024, Myanmar's drug economy accounted for 59 per cent of the total value of the drug economy across all five countries, up from just 21 per cent in 2015.

FIGURE 4.5

Estimated production value of illicit drug economies in five conflict-affected states, 2015–2024 (US$, billions)

The size of the illicit economy in key conflict-affected states has increased by more than 300 per cent in the past decade.



Source: UNODC World Drug Reports; DEA NDTAs; Carnegie Endowment; New Lines Institute

The remaining four countries show divergent paths shaped by their distinct conflict dynamics. Colombia's cocaine economy grew steadily, rising 70 per cent from US$5 billion in 2020 to US$8.5 billion in 2024. The increase reflected record coca cultivation of 253,000 hectares in 2023 and a 53 per cent surge in cocaine production. Mexico's combined fentanyl, methamphetamine, and heroin economy peaked at approximately US$15 billion in 2023 before declining to US$13 billion in 2024. Afghanistan saw the most dramatic collapse of any state, with its opiate economy falling 80 per cent from US$2 billion in 2020 to US$0.4 billion in 2024 after the Taliban's enforcement of a cultivation ban that reduced poppy production by 95 per cent. Syria's Captagon trade peaked at an estimated US$5.7 billion in 2021 under the Assad regime's sponsorship and declined to approximately US$2 billion in 2024, after the regime's fall in December 2024. However, production infrastructure and smuggling networks persist, and the future of the trade remains uncertain.

Rebel Sanctuaries
The fourth material channel is the use of neighbouring territory as a rear base. Non-state armed groups exploit weak state control or sympathetic governments in nearby countries to establish bases for recruitment, training, logistics, and strategic withdrawal. External rebel bases feature in over half of all armed insurgencies since 1945.[13] In the period since 2001, the most consequential case is the Taliban's use of the tribal areas of Pakistan as a sanctuary from which to reconstitute, recruit and launch operations into Afghanistan. The tribal areas and semi-autonomous governing councils, alongside reported support from Pakistan's Inter-Services Intelligence agency, maintained a complex relationship with Taliban factions. Pakistan cooperated with the US counter-terrorism effort while at the same time hedging links to militant groups, partly to maintain leverage over the government of Afghanistan.

Relational channels

Transborder Ethnic Kin
Ethnic groups divided by colonial-era borders form one of the most powerful structural channels for spreading conflict. The presence of transborder ethnic kin (TEK) groups, meaning ethnic communities that span international borders, raises the risk of civil war onset. The relationship is not linear. Medium-sized TEK groups present the greatest risk, because they are large enough to provide meaningful support to a co-ethnic insurgency but not so large that they deter the host state from acting.[14]

The Kurdish case is the most extensive contemporary example. The decades-long insurgency by the Kurdistan Workers' Party (PKK) against Türkiye has always had a transnational dimension, but the period after 2003 expanded it dramatically. The US-led invasion of Iraq created a semi-autonomous Kurdish region in northern Iraq that functioned both as a TEK support base and as a demonstration of Kurdish self-governance. When the Syrian civil war fragmented Assad's control of north-eastern Syria, the PYD and its armed wing, the YPG, which were organisationally linked to the PKK, established de facto autonomy in the area known as Rojava. The result was a contiguous zone of Kurdish political mobilisation that shaped Turkish, Iraqi, Iranian, and Syrian strategic calculations.[15]

The Tuareg case shows how TEK mobilisation can drive rapid conflict spread. Tuareg communities spanning Mali, Niger, Libya, and Algeria had long-standing grievances against their respective central governments. The 2011 Libyan civil war ended the Gaddafi regime, which had recruited Tuareg fighters into its security forces. Heavily armed Tuareg fighters returned to northern Mali and in January 2012 launched the rebellion of the National Movement for the Liberation of Azawad (MNLA). They seized the entire northern region of Mali within weeks, creating a political vacuum that jihadist groups subsequently exploited.[16]

External State Support
External state sponsorship works in a similar way. States channel arms, financing, training, intelligence or political support to armed factions in another state's civil war, typically to undermine a rival, advance ideological aims or secure strategic interests. The result is the internationalisation of the conflict, often creating a competitive dynamic between multiple sponsors that intensifies and prolongs fighting.

The Syrian civil war became the most complex proxy conflict of the twenty-first century. Iran, Russia and the Lebanese armed group Hezbollah supported the Assad government, while Saudi Arabia, Qatar, Türkiye, and the United States supported various opposition factions. The competitive sponsorship did more than internationalise the conflict. It fragmented the opposition, created incentives against a negotiated settlement, and escalated both the intensity and duration of fighting. These kinds of interventions prolong conflicts as with outside support neither side runs short of the resources that would otherwise force negotiation.[17]

Transnational Ideological Networks
Ideological movements and transnational organisational networks, including jihadist, ethno-nationalist and revolutionary movements, spread doctrines, tactical methods, and organisational templates across borders. They do so through formal affiliations, foreign-fighter pipelines, and digital propaganda. The Islamic State phenomenon from 2013 onward combined this kind of network diffusion with the demonstration effects discussed below. The declaration of a territorial 'caliphate' served as a symbolic attractor that drew over 40,000 foreign fighters from more than 110 countries.[18] When the territorial caliphate was dismantled, those fighters dispersed, taking with them skills, networks, and ideological commitment. Their dispersal contributed to conflict escalation in West Africa, East Africa and Southeast Asia, and generated returnee terrorism risks across Europe and Central Asia.[19]

Conditioning Factors

Demonstration Effects
Demonstration effects operate as a powerful, though uneven, channel of conflict diffusion. Demonstration effects are a phenomenon in conflict where events or tactical successes in one region act as catalysts that inspire, trigger, or legitimise similar mobilisations or armed uprisings in another region or population. The Arab Spring is the best example, as shown in Figure 4.6. The self-immolation of Tunisian street vendor Mohamed Bouazizi in December 2010 triggered a cascade of mobilisation across the Arab world. The cascade was caused not by shared borders or refugee flows but by shared grievances against authoritarian governance, amplified through satellite television and social media. Successful protests were more likely to be emulated than unsuccessful ones, suggesting a rational

learning process rather than emotional contagion.[20] The Arab Spring also shows how demonstration effects can catalyse armed conflict through a second-order mechanism. When regimes in Syria, Libya and Yemen responded to peaceful protests with violent repression, the resulting civil wars generated their own diffusion dynamics through the material and relational channels described earlier in this section.

Low state capacity does not directly cause conflict to spread, but it creates the conditions of vulnerability to new shocks. Weak territorial control, limited infrastructure, extractive institutions, and poor governance make it difficult for states to resist conflict spreading from neighbouring countries. Three patterns illustrate the point:

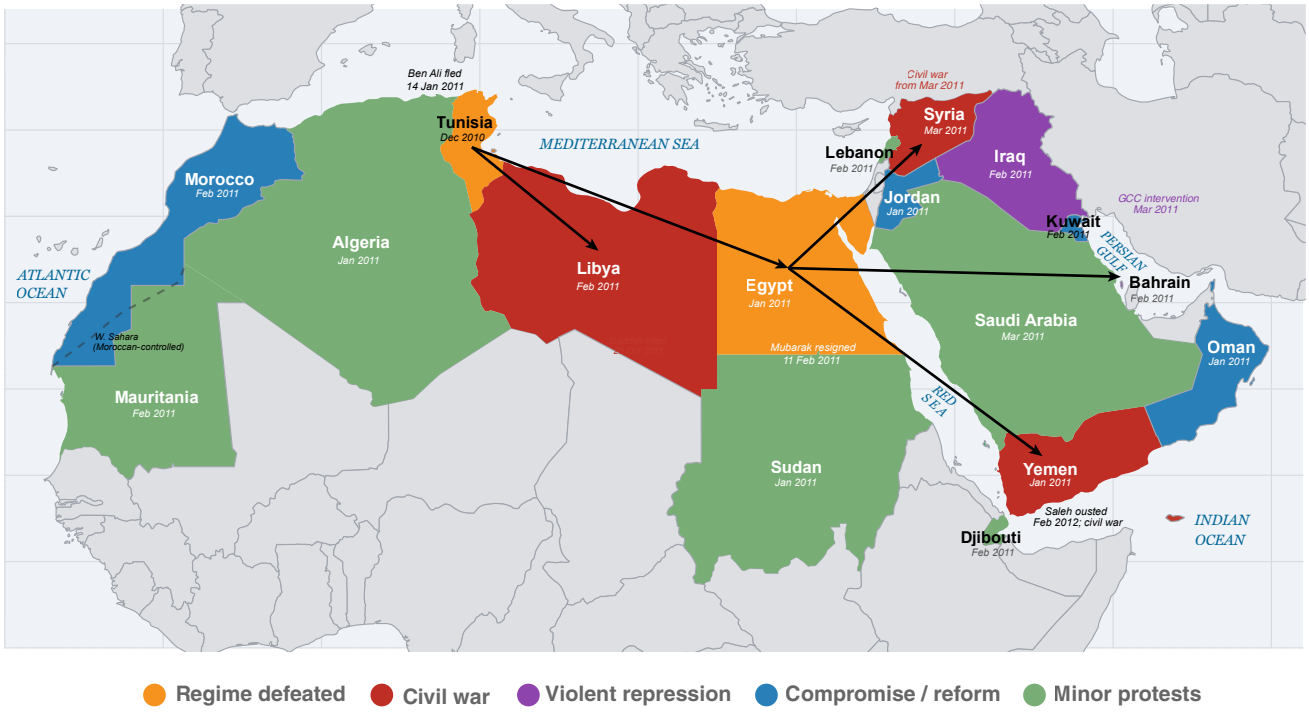
- The chronic governance vacuum in the eastern parts of the Democratic Republic of the Congo has enabled multiple cross-border armed groups to operate for a quarter-century.
- The inability of Sahelian states to control vast ungoverned spaces has facilitated jihadist expansion from Mali into Burkina Faso and Niger.
- The collapse of state institutions in the Central African Republic has allowed armed groups to proliferate and operate across borders since 2013.

The Horn of Africa, the focus of the next part of this section, offers the most comprehensive contemporary illustration of how these nine mechanisms operate simultaneously within a single regional system.

FIGURE 4.6

Conflict Spread throughout the Arab Spring

Violent demonstrations in one country rapidly led to similar movements across the Arab World.



Source: Britannica; Al Jazeera; History.com; ICG; Natural Earth

The Horn of Africa: Conflict Spread as a Regional System

The Horn of Africa, comprising Sudan, Ethiopia, Eritrea, Somalia, Djibouti, and South Sudan, is the clearest example of all nine factors operating at the same time. These are not separate conflicts that happen to share geographic proximity. Sudan's civil war, Ethiopia's overlapping insurgencies in Tigray, Amhara, and Oromia, the chronic fragility of South Sudan and Somalia, and the unresolved rivalry between Ethiopia and Eritrea are deeply linked. They are connected through refugee flows, transborder ethnic mobilisation, rebel sanctuaries, proxy warfare, arms circulation, the effects of demonstrations, ideological networks, illicit economies, and weak state capacity.[21] The level of interconnectedness means that these conflicts cannot be understood in isolation but must be analysed as a single regional conflict system, as shown in Figure 4.7.

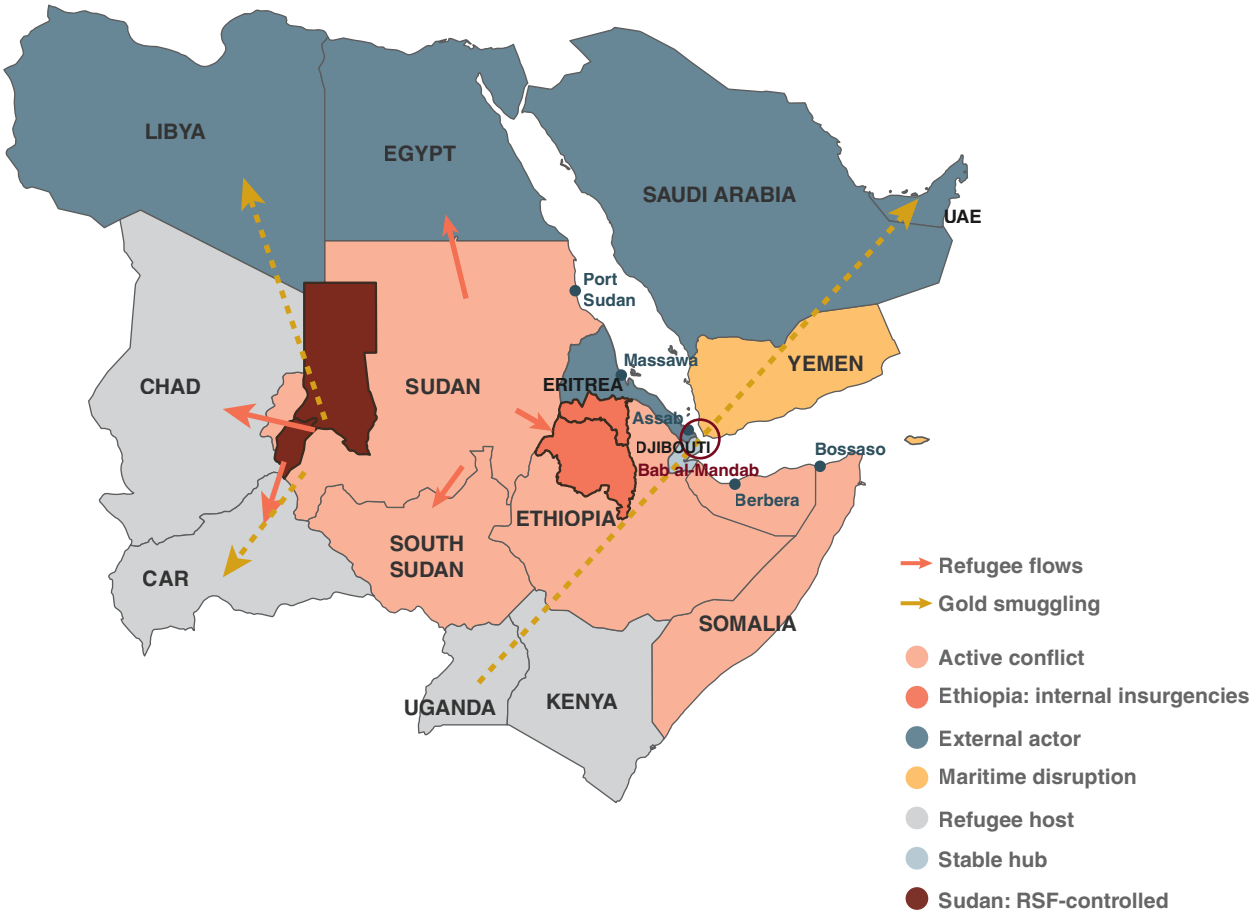
This section analyses those interconnected factors, across three different areas:

- Firstly, the Sudan war, the Horn's most internationalised conflict, and the regional gold-smuggling networks that finance the Rapid Support Forces.
- Secondly, the spread of conflict within Ethiopia, and the Ethiopia–Eritrea axis that links Sudan's war to Red Sea disputes over Somaliland, port access, and encirclement.
- Thirdly, South Sudan and Somalia, two states that act as conduits through which the region's wars amplify one another.

FIGURE 4.7

The Horn of Africa as a Single Conflict System, 2026

All nine conflict spread factors are present in the Horn of Africa.



Source: IEP Analysis.

Sudan's war as a regional conflict complex

The war between the Sudanese Armed Forces (SAF) and the Rapid Support Forces (RSF) began on 15 April 2023 and has become the world's most severe humanitarian crisis. By early 2025, an estimated 30 million people required humanitarian assistance, and over 12 million people had been displaced, nine million within Sudan and 3.5 million across international borders.[22] Credible estimates suggest as many as 400,000 people may have been killed.[23] The severity of the conflict was highlighted by the US State Department's conclusion that the RSF had committed genocide in Darfur.[24] The Sudan war is a fully internationalised conflict in which at least seven of the nine typology mechanisms operate at the same time.

The most consequential mechanism shaping the war is external state sponsorship. The conflict has attracted an unusually broad set of foreign patrons. The UAE has emerged as the RSF's principal external backer. A 2024 UN Panel of Experts report documented financial and material support channelled in part through eastern Chad and Ethiopia.[25] The UAE is involved for several reasons. They include strategic positioning in the Red Sea corridor, access to Sudan's gold reserves and a broader interest in preventing Islamist influence over Sudanese governance. The RSF partially controls those gold reserves through artisanal mining in Darfur.[26]

Ethiopia, South Sudan, Uganda, Kenya, and the Central African Republic are also believed to have supported the RSF at various points. The Ethiopian government in particular has been reported to have provided military assistance, including a training camp in western Ethiopia, as the RSF attempted to expand its war into Sudan's Blue Nile state.[27]

On the SAF side, a coalition of supporters has consolidated. Egypt, motivated by its opposition to the Grand Ethiopian Renaissance Dam and its long-standing relationship with Sudan's regular military, has provided fighter jets, training and diplomatic backing.[28] There is also evidence of direct Egyptian drone deployment against the RSF in recent months.[29] Iran, seeking a foothold on the Red Sea, has reportedly sent at least nine cargo planes of military equipment since December 2023.[30] Eritrea has moved beyond diplomatic support, reportedly deploying elements of its defence forces alongside the SAF and facilitating arms transfers.[31] Tigrayan fighters from the Tigray People's Liberation Front (TPLF), and ethnic Tigrayans and Eritreans in eastern Sudan, further link the two wars.

Türkiye, Qatar, and China have provided varying levels of support to the SAF. Russia, seeking naval access to Port Sudan, has hedged by supporting both sides at different stages.[32] The competitive sponsorship dynamic closely mirrors the Syrian model. It has intensified the conflict, fragmented peace processes, and created conditions under which neither party faces the resource constraints that might otherwise compel negotiation.

The strategic geography of the conflict shifted substantially through 2025. In January, the SAF drove RSF forces out of Omdurman, recaptured a vital oil refinery north of Khartoum, and regained near-total control of Bahri. In February, SAF forces ended the RSF's two-year siege of el-Obeid. In March, the army recaptured Khartoum itself, which had been under RSF occupation since the war began. At the same time, RSF leadership gathered in Nairobi in February to advance plans for a parallel government, signing a charter outlining a post-war political framework, and in early March signed a new constitution to garner diplomatic leverage.

The SAF's momentum continued into mid-2025, pushing RSF forces out of northern White Nile state and regaining Kadugli and Dilling in South Kordofan. However, the RSF retained its grip on Darfur. On 26 October, RSF forces captured El Fasher, the capital of North Darfur, after a two-year siege. At least 10,000 civilians were reportedly killed in the two days following the fall of the city, and as many as 60,000 more remain unaccounted for.

By late 2025 and into 2026, the conflict's centre of gravity shifted to Kordofan, threatening to harden a de facto partition of Sudan. In December 2025, the RSF seized the strategic Heglig oilfield in West Kordofan, and the SAF intensified aerial campaigns in response. Fighting in early 2026 has intensified further, with near-daily drone strikes causing substantial civilian casualties and striking markets, health facilities, and residential areas.

As of April 2026, Sudan is clearly divided. The SAF controls the northern, central, and eastern states and the capital. The RSF dominates the west. No negotiated settlement is in prospect.

Sudan's displacement crisis is straining every neighbouring state. Over 1.4 million Sudanese refugees have crossed into Chad, Ethiopia, South Sudan, Egypt, and the Central African Republic.[33] In Ethiopia, Sudanese refugees in camps in the Amhara region, particularly Awlala and Kumer, have been subjected to violence by local militias and Fano fighters. Ethiopian federal forces clashed with Fano in and around these camps in September 2024, placing refugees directly in the crossfire of Ethiopia's own internal conflict.[34] Ethiopian soldiers forcibly returned several hundred Sudanese refugees in August 2024, a clear violation of international protection standards.[35] Many TPLF fighters left Ethiopia during the war in Tigray of 2020 to 2022 and crossed into Gedaref state in eastern Sudan. Some analysts predict these fighters may become active again if Eritrea and the TPLF go to war against Ethiopia.

The gold and conflict nexus

The financial structure of the RSF illustrates how illicit economies sustain and direct armed conflict. Pre-existing cross-border commercial networks have given the RSF financing capacity that does not depend on any single state sponsor.[36] Gold revenues are laundered through trading networks linked to the UAE, tying RSF territorial control in Darfur directly to Gulf financial markets.[37] The dynamic makes the conflict exceptionally resistant to resolution. Even if external state sponsorship were withdrawn, the self-financing capacity of the RSF through gold extraction would enable continued operations. The illicit economy does not merely fund the war, it also shapes the war's geography. RSF territorial objectives are driven in part by the location of mining sites and trafficking corridors.

Gold replaced oil as Sudan's primary source of foreign currency after South Sudan's secession in 2011 stripped the country of two-thirds of its petroleum reserves.[38] Official production rose rapidly from 40 tonnes in 2012 to a peak of 107.3 tonnes in 2017. Most of this output came from artisanal and small-scale mining, which accounts for over 80 per cent of total production. The Swiss non-government organisation SWISSAID estimates that at least 400 tonnes of gold were smuggled out of Sudan between 2012 and 2024, with the UAE as the primary destination, as shown in Figure 4.8.

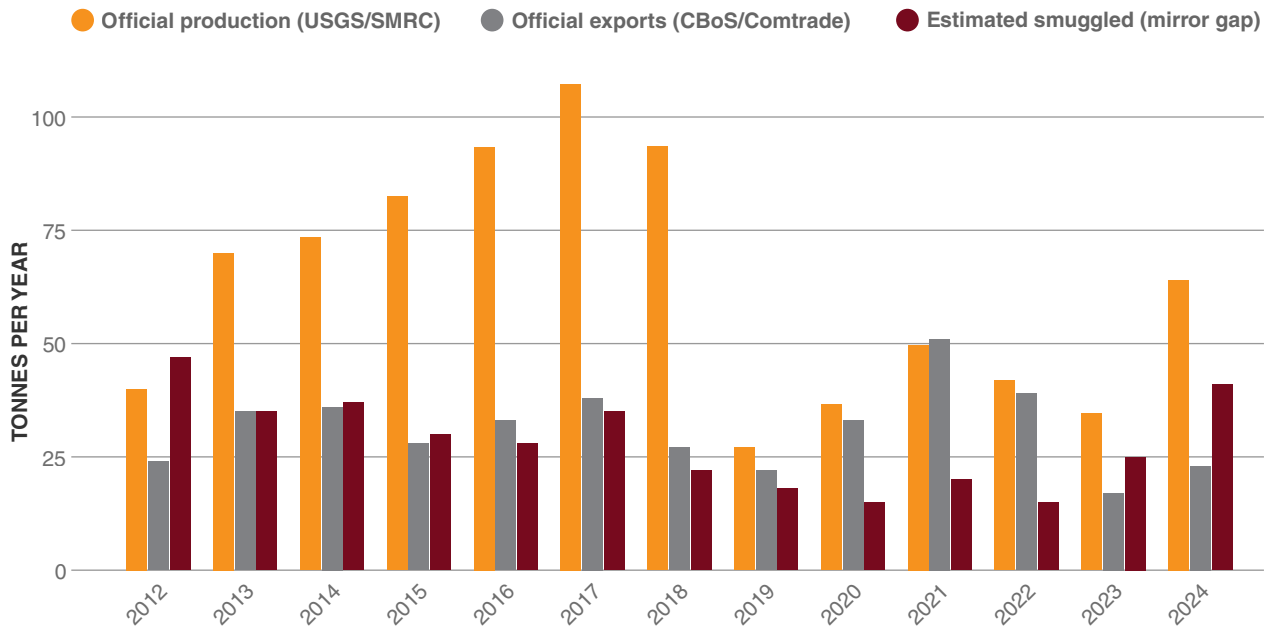
The RSF controls the major artisanal mining areas in Darfur and Kordofan, including the high-yield Jebel Amer mines, and has used gold revenues to sustain its war effort. A confidential UN Panel of Experts report estimated that the RSF produced 10 tonnes of gold in 2024 alone, with a market value of approximately US$860 million.[39]

The most revealing evidence of this wartime gold economy is seen in the gold export figures of Sudan's neighbours. Countries allied to the RSF or serving as logistics corridors for it have seen dramatic surges in gold exports to the UAE since 2023, as shown in Figure 4.9.

FIGURE 4.8

Gold production and exports in Sudan, 2012–2024

The start of the civil war led to both production and smuggling increasing.

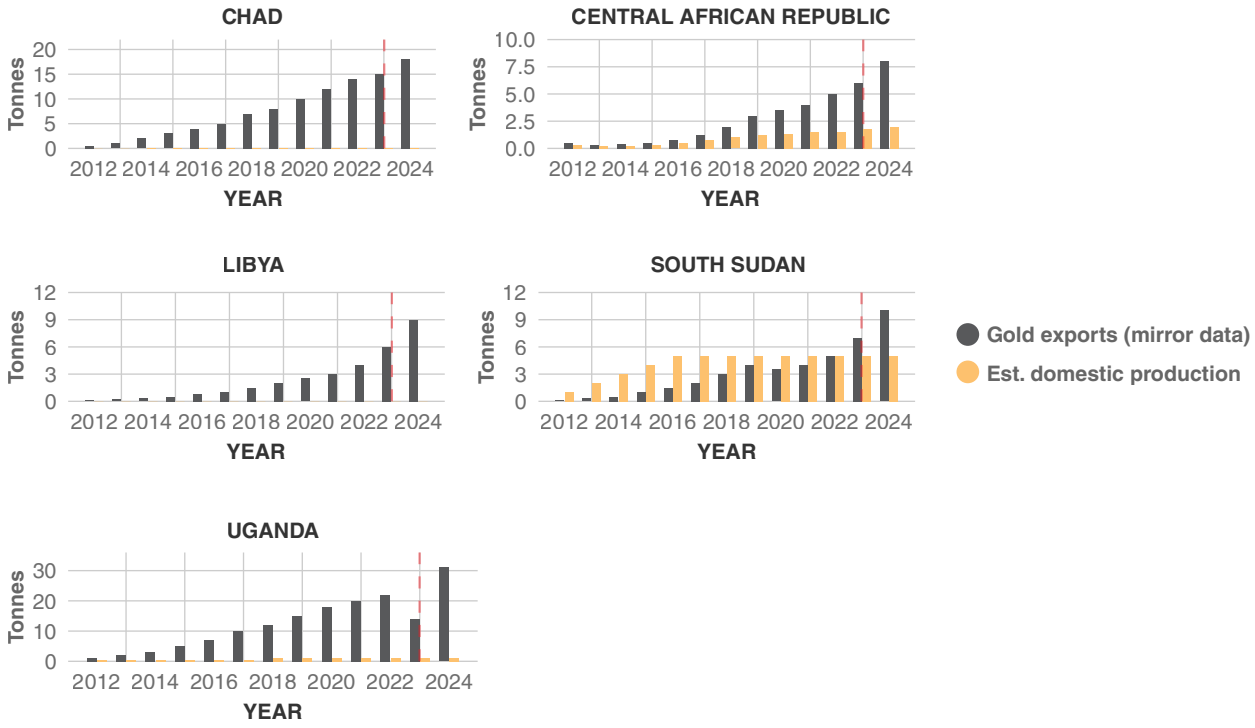


Source: USGS Minerals Yearbook; SMRC; CBoS; UN Comtrade mirror data; SWISSAID African Gold Report (2025); Chatham House (2025)

FIGURE 4.9

Gold exports to the United Arab Emirates from five Sudanese-neighbour states compared with domestic production, 2012–2024

Exports from Sudan's neighbours to the UAE increased, even as domestic production remained stable.



Source: IEP Analysis

Chad is the primary exit corridor. Its domestic gold production is essentially zero. The US Geological Survey reports a peak of just 150 kilograms in 2007 and negligible output since. Yet UAE customs data show gold imports from Chad rising from under one tonne in 2012 to 18 tonnes in 2024.

Libya and the Central African Republic serve as secondary exit routes. Libya has no gold mining sector at all, yet the UAE imported nine tonnes of gold from Libya in 2024. The gold is routed through the Kufra corridor in southeastern Libya, an area controlled by Khalifa Haftar's Libyan National Army (LNA), a documented logistical partner of the RSF.

The Central African Republic operates as a transit node within the network of the Russian Wagner Group, also known as Africa Corps. Gold is flown from LNA bases in eastern Libya to the Central African Republic before being driven into Sudan or re-exported to Dubai.

Uganda is another example. The UAE imported 31 tonnes of Ugandan gold in 2024, more than double the 14 tonnes recorded in 2023, despite Uganda's domestic production of approximately one tonne per year. These flows follow established smuggling routes that move gold from Sudan and the conflict-affected eastern provinces of the Democratic Republic of the Congo through Kampala to Dubai.

The pattern across all five neighbouring states is consistent. Gold exports to the UAE far exceed domestic production. The gap widened sharply after Sudan's civil war began, and the primary beneficiaries are all actors allied to the RSF. The regional gold smuggling network is a significant source of conflict financing and operates largely outside the reach of international sanctions.

Gold's role in the conflicts of Sudan, the Democratic Republic of the Congo, Mali, and Burkina Faso was forming while the gold price sat at around US$2,000 per ounce. Since 2024, the price has risen approximately 150 per cent, briefly breaking US$5,000 per ounce in March 2026, as shown in Figure 4.10. At substantially lower prices, gold extraction and smuggling was profitable and had already reshaped conflict dynamics across the region. The implications of prices at current levels are unknown. The price shock is likely to increase revenue for arms and soldiers and create sharper incentives to control mining territory and transit routes.

Gold is not the only resource subject to this dynamic. Gum arabic (a key ingredient in global food production), arable land bought up by Gulf states to grow food for home, and oil pipelines are all contested in the same way.[40] Since the fall of the Assad regime in Syria in December 2024, significant Captagon manufacturing has shifted from Syria to Sudan and is likely to become a growing source of RSF financing. The RSF has been linked to production facilities discovered by Sudanese government authorities.[41]

Ethiopia's overlapping conflicts

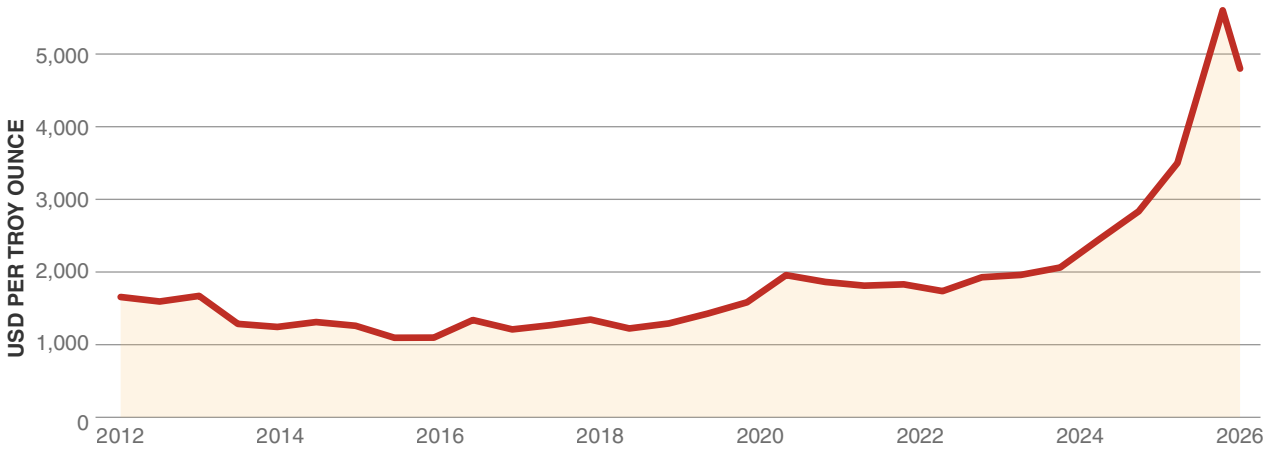
Ethiopia is a prime example of the domestic diffusion of armed conflict linked to a broader regional conflict system.[42] Since 2020, Ethiopia has experienced three major armed conflicts: the Tigray War of 2020 to 2022, the Fano insurgency in Amhara since 2023, and the insurgency by the Oromo Liberation Army (OLA) in Oromia since 2019.[43] These are not independent events. Each conflict has generated diffusion effects that catalysed or intensified the others.

The sequence shows a clear example of the copying of success elsewhere. In 2020 and 2021, Tigrayan forces advanced to within 137 kilometres of Addis Ababa before being pushed back. This early success showed that the Ethiopian National Defence Force (ENDF) could be challenged militarily. The Fano militia, which had allied with the federal government during the Tigray War, turned against the federal government in April 2023 when the government attempted to dissolve regional special forces and integrate them into the federal military.[44] By 2025, Fano forces claimed to control over 80 per cent of rural Amhara, with the ENDF restricted to major towns and highways.[45]

FIGURE 4.10

Monthly gold price, 2012–2026

The surge in the price of gold in the past three years has bolstered many armed extremist groups.



Source: LBMA Gold Price; World Gold Council; APMEX; Trading Economics

The government's heavy use of drone strikes has caused large numbers of civilian deaths, with more than 300 people killed in 2024. Federal forces have also carried out documented extrajudicial killings, including the massacres in Merawi in January 2024 and Birakat in March 2025. A peace agreement signed in December 2024 between the Oromia regional government and one OLA faction led to an immediate drop in violence. However, splinter factions remain active, and data from early 2025 show continued OLA attacks on civilians and clashes with government forces.

Ethiopia's ethnic federal system creates structural conditions that are highly conducive to transborder ethnic mobilisation, both within the country and internationally. Because each state is dominated by one main ethnic group, this has led to competition and conflict over the distribution of national goods and resources being drawn along ethnic lines rather than regional or political ones.

The Amhara and Tigray boundary is the most volatile internal fault line due to long-term disputes over ethnic borders. During the Tigray War, Amhara forces and Fano militia seized the contested districts in western Tigray. These territories remain under Amhara-aligned administration, and the regional administration estimates that approximately 40 per cent of Tigray remains occupied as of 2026.[46] The TPLF's internal fracture, between factions loyal to Debretsion Gebremichael and Getachew Reda, has further destabilised Tigray. ACLED reported rising political violence and forced takeovers of local administrations by the Debretsion faction throughout early 2025.[47]

Arms circulation compounds these dynamics. The Tigray War distributed large quantities of military equipment – supplied by or looted from Ethiopian or Eritrean army stockpiles – to non-state actors and paramilitary groups. TPLF leaders claimed in 2024 that over 270,000 members of the Tigray Defence Forces (TDF) remained armed. Some demobilisation began in late 2024, but the process reportedly stalled due to budget shortages.[48] The Fano insurgency has been sustained in part by weapons captured during the Tigray War. The government tried to disarm the regional special forces because the war had spread military capacity across northern Ethiopia in ways that threatened central authority.

The intersection of Ethiopia's internal conflicts with Sudan's civil war has created new sanctuary dynamics. In February 2026, Reuters reported that thousands of RSF soldiers had received training at an expansive secret camp in dense forest just across the Ethiopian border from Sudan's Blue Nile state. Multiple sources, including a senior Ethiopian official, confirmed that the UAE had provided financial and logistical support to these camps.[49] The SAF has accused Ethiopia of facilitating RSF operations through its Benishangul-Gumuz region.[50] There are also reports that TPLF fighters have participated in Sudan's conflict on the SAF side, and that Fano elements in Ethiopia have received Eritrean support.[51] If substantiated, these links would mark a sharp escalation in how the Horn's conflicts interlock.

The Ethiopia and Eritrea axis and the Red Sea

The deterioration of relations between Ethiopia and Eritrea since 2020 is now one of the most important factors shaping the wider regional conflict. The 2018 peace agreement with Eritrea has effectively collapsed. The breakdown became explicit in February 2025, when the Ethiopian President publicly acknowledged that Eritrean forces had been present in Tigray and had committed atrocities. Ethiopian Foreign Minister Gedion Timothewos formally demanded the withdrawal of the Eritrean Defence Forces.[52] However, Eritrean forces continued to expand their presence in northern Tigray throughout 2025.[53] The Debretsion faction of the TPLF has been alleged to maintain ties with Eritrea, a striking reversal given the historic enmity between the TPLF and the Eritrean government.[54]

Eritrea's role in the current regional configuration operates through a strategy of the systematic exploitation of regional fractures.[55] The Eritrean government has aligned firmly with the SAF in Sudan's war, providing training, arms transfers and reportedly deploying combat forces. The alignment positions Eritrea within a broader coalition, alongside Egypt, that effectively encircles Ethiopia. In January 2025, Egypt announced it would jointly train SAF troops alongside Somalia and Eritrea, formalising a security axis that the Ethiopian government perceives as directly threatening.[56]

Ethiopia has responded by building its own alliance network. The UAE, being the RSF's principal backer, has cooperated with Ethiopia on multiple fronts, including Ethiopia's bid for Red Sea access, a goal that directly threatens Eritrean interests. In January 2024, Ethiopia signed a memorandum of understanding (MoU) with Somaliland for access to the port of Berbera.[57] The MoU provoked outrage from the Somali government and set off a chain reaction of diplomatic realignments across the Horn. Somalia recalled its ambassador to Addis Ababa, Somali nationalism surged, and the Somali government rallied regional allies against Ethiopia, while Egypt entered a security pact with Eritrea and Somalia. Türkiye mediated a partial reconciliation through the December 2024 Ankara Declaration, under which Ethiopia and Somalia agreed to normalise relations. The agreement made no mention of the original MoU. Ethiopia has not confirmed its cancellation, and Somaliland maintains the agreement still stands.[58]

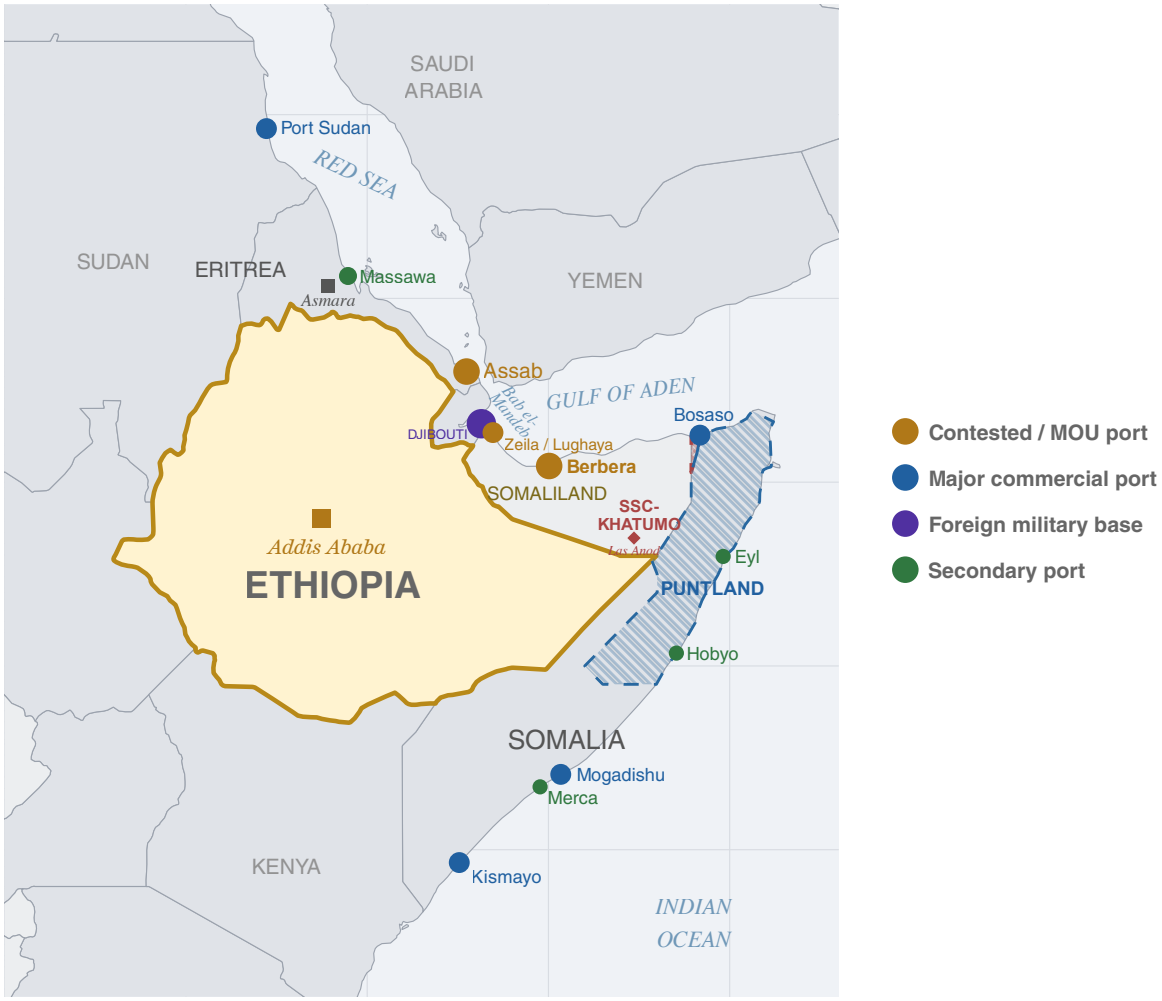
A further escalation came when Israel recognised Somaliland on 26 December 2025, becoming the first UN member state to do so. The Israeli government framed recognition as a Red Sea security move to counter Houthi threats and secure the Berbera port on the Gulf of Aden. Egypt meanwhile signed deals to upgrade Eritrea's port of Assab and expand its capacity to include warship berths, and concluded port development agreements with Djibouti in December 2025. Analysts read these moves as a deliberate encirclement strategy to deny Ethiopia independent Red Sea access.

The risk of armed conflict between Ethiopia and Eritrea has grown sharply, and as of early 2026 it represents one of the most acute war risks in the region. Eritrea ordered a nationwide military mobilisation in mid-February 2025, and Ethiopia deployed troops toward the Eritrean border. Tensions escalated further when Ethiopia's foreign minister in February 2026 formally accused Eritrea of 'military aggression', alleging that Eritrean forces were occupying Ethiopian territory and that Eritrea had supplied ammunition to rebel Fano groups in

FIGURE 4.11

Port locations and sea access in the Horn of Africa

Ethiopia's attempts to gain access to the Red Sea have triggered a spiralling diplomatic crisis.



Source: ICG (2024); ACLED (2024); Carnegie (2025); SIPRI (2019); Natural Earth

Amhara. The Eritrean government rejected the charges as 'patently false and fabricated'. Ethiopia perceives an emerging hostile alliance of Egypt, Eritrea, the Sudanese SAF and dissident TPLF factions. This has reportedly pulled it deeper into the Sudan war, including through the alleged UAE-financed construction of an RSF training camp in Benishangul-Gumuz. The structural driver is unchanged. Ethiopia routes roughly 95 per cent of its international trade through Djibouti, paying US$1.5 billion to US$2.8 billion annually in fees. Independent Red Sea access is both an economic imperative and a nationalist cause that successive crises have intensified.

South Sudan and Somalia as conduits

South Sudan illustrates how low state capacity transforms neighbouring conflicts into existential threats. Over one million people have crossed into South Sudan from Sudan since April 2023. The majority are South Sudanese returnees who had previously fled their own country's earlier conflict.[59] The returnees are arriving in areas with virtually no services, infrastructure, or economic opportunities. The conditions closely parallel the resource-competition dynamics identified elsewhere in the typology. Elections in South Sudan have been repeatedly postponed, security-sector reform has stalled, and weapons flow freely across the Sudan and South Sudan border. A peace agreement formally remains in place. In practice, South Sudan is once again at war.[60]

Somalia contributes to the Horn's conflict system through two distinct channels. The first is the ongoing insurgency by the al-Qaeda-affiliated armed group al-Shabaab, the clearest example of transnational ideological diffusion in the region. Cross-border operations by al-Shabaab reach into Kenya and Ethiopia. Estimated annual revenues of US$100 to US$150 million from charcoal exports, port taxation, and extortion give the group self-financing capacity that sustains operations independently of external sponsors.[61] The second channel is the geopolitical competition triggered by Ethiopia's Somaliland port deal. The deal pushed the Somali government into closer alignment with Egypt and Eritrea in a coalition directed against Ethiopian regional ambitions. The result is that Somalia's foreign relations are now bound up with conflicts in which it is not itself a combatant.

The Iran War as a Regional Shock

The US and Israeli military campaign against Iran has introduced a new layer of structural instability into the Horn of Africa. Three of the nine conflict mechanisms are particularly affected.

- Gulf patrons are re-prioritising, which alters external sponsorship.
- Red Sea maritime corridors have been disrupted, which affects illicit flows.
- Food and energy price shocks are translating into fiscal stress in import-dependent states, which reduces state capacity.

The Iran war matters to the Horn because it changes the intensity of mechanisms already shaping the region's conflicts. It also arrives at a moment when those conflicts are unusually sensitive to external shocks.

The most immediate effect of the Iran war on the Horn is economic, and the consequences for import-dependent states are severe. Wheat accounts for approximately 67 per cent of total cereal consumption in Djibouti, 38 per cent in Sudan, and roughly 24 per cent in Ethiopia, Kenya and Somalia. Food price inflation in parts of East Africa peaked at 30 per cent during the 2023 Red Sea disruptions alone.

Sudan is acutely exposed at both ends of the supply chain. Disruption around the Strait of Hormuz and damage to natural-gas production (which yields fertiliser by-products) have created shortages just before April planting, when fuel and fertiliser are most needed. Oil prices reached US$119 a barrel in March 2026, and analysts warn that prices could exceed US$150 if both chokepoints are significantly disrupted for extended periods. For Ethiopia, any sustained decline in maritime traffic through Bab al-Mandab, a strait at the southern entrance to the Red Sea, will strain Djibouti's import-dependent economy and jeopardise the movement of food and supplies for over 120 million people.

The second major channel runs through the Gulf states. Their financial, military, and diplomatic engagement has been central to shaping conflict in the Horn for over a decade. An estimated 500,000 Ethiopians and 100,000 Eritreans work in Saudi Arabia alone. A further 100,000 Ethiopians work in the UAE, and 540,000 Sudanese work across Gulf states, representing roughly a third of the entire Sudanese diaspora. For many households in the Horn, these remittances are the fiscal architecture that finances food, healthcare, and education.[62] As the Gulf states turn inward to manage their own security, the strategic importance of Horn states for Saudi Arabia and the UAE may diminish, at least temporarily.

For Sudan specifically, the reduction in support could hit the RSF particularly hard, because its principal external backer is now focused on its own security, while the SAF may continue to benefit from Turkish and Egyptian support. However, the picture is not straightforward. Even while Iranian drones and missiles struck the UAE during the Iran war, the UAE government continued to deliver weapons to the RSF, including via the Central African Republic and Ethiopia.[63] The slowdown in arms flows from the UAE's air bridge is best read not as proof that support has ended, but as evidence that the support is vulnerable to broader regional shocks.

The war has also reshaped how external actors underwriting the conflict in the Horn see one another. A greater regional emphasis on economic competition over Islamist politics had already contributed to heightened competition in the Red Sea, especially since Israel began degrading Iran's regional influence after October 2023. With Iran neutralised or weakened, Saudi Arabia, Egypt, and Türkiye may come to view the alliance between the UAE, Israel, and Ethiopia as the more significant threat to regional stability.

The shift has direct implications for Sudan. The same Iran crisis that has consumed Gulf attention may also create an opening. Faced with a shared security challenge, Saudi Arabia and the UAE may find reason to set aside their differences, including over Sudan, potentially reviving stalled diplomatic efforts under the so-called Quad grouping of the United States, Saudi Arabia, UAE, and the African Union. US policy has added another layer of complexity. In March 2026, the US government designated the Sudanese Muslim Brotherhood as a Specially Designated Global Terrorist entity, citing links to Iran's Revolutionary Guard. The designation gives the RSF a political frame to cast the SAF's survival as dependent on Islamist groups that the US government has officially treated as terrorist actors.

Net effects on Ethiopia, Eritrea, Somaliland and South Sudan

For the Ethiopia–Eritrea confrontation, the Iran war has not extinguished the risk of conflict, and may, in some respects, have sharpened it. Long-standing grievances may become more pronounced as Gulf patrons are distracted. Reduced patronage and mediation capacity could lead either to a pause in tensions or to rapid escalation. Ethiopia is now deeper in Sudan's conflict on the RSF's side, allegedly allowing it to launch attack drones from western Ethiopia and helping traffic weapons. Because Eritrea backs the SAF, this further entangles the Sudan and Ethiopia–Eritrea crises.

Regarding Somaliland, the Iran war has effectively frozen rather than resolved the diplomatic contest. Israel's recognition of Somaliland, which Qatar, Saudi Arabia, Egypt, and Türkiye have all opposed, is now far from Gulf agendas. The Somali government's long-standing ambition of reabsorbing Somaliland may also find waning external support. South Sudan, meanwhile, returned to civil war in January 2026. Its trajectory is further complicated by the Iran war's effects on oil revenues, humanitarian supply chains, and the diminished bandwidth of the international community and regional patrons to manage yet another simultaneous crisis.

The Iran war thus functions not as an external shock that overrides local conflict dynamics, but as a force multiplier on existing fragilities. It compounds food insecurity, weakens the patronage networks that have both fuelled and mediated local conflicts, and raises the strategic value of Red Sea ports such as Port Sudan, Berbera, Assab, and Massawa. The pressure comes at a time when the states that control, or seek to control, these ports are under the greatest strain. The question is not whether Iran will suddenly expand into East Africa, but whether the region grows more tolerant of force as a tool of statecraft. If escalation becomes normalised at the heart of the Middle East, the consequences will be felt across the Red Sea region.

Artificial intelligence is reshaping both peace and conflict. As the level of conflict globally reaches record levels, AI-enabled war infrastructure is already in the field, while AI for Peace remains fragmented and underfunded.

Drones have become the defining weapon of modern warfare, spreading faster than any government can keep up with. Drone attacks rose roughly 11,500 per cent between 2018 and 2025, and 565 different armed groups carried out at least one attack in that period.

Multi-domain warfare at machine speed is now increasingly common. In the first 12 hours of Operation Epic Fury, 200 Israeli aircraft struck 500 targets, and US forces conducted 900 strikes.

Military AI procurement is expanding rapidly. The Pentagon's Maven Smart System contract ceiling rose 165 per cent in 12 months, reaching roughly US$1.3 billion by May 2025.

Human oversight of AI targeting is increasingly being phased out. The Israel Defence Force's (IDF) Lavender system flagged 37,000 Palestinians as suspected militants in Gaza, with operators reportedly spending around 20 seconds per target despite a 10 per cent error rate.

Target-to-fire times have dramatically reduced, from one day in the 1990s using cruise missiles to five seconds using the Russian V2U autonomous selection system.

AI's physical footprint is rapidly reshaping global energy systems. Data centre electricity use is projected to reach 945 terawatt-hours by 2030, a doubling from 2024. Ireland's data centres already consume 22 per cent of national metered electricity.

The international community is generally unprepared or unwilling to adopt basic humanitarian AI governance. Of 193 UN Member States, 118 are missing from the seven leading AI governance initiatives.

Military AI logistics and predictive maintenance will be strategically deployed to forecast ammunition use, anticipate equipment failure, and re-allocate supply across a theatre.

AI investment (US$)

US	China
109 billion	9.3 billion

AI capability and capital are concentrating in a handful of states and firms, as are the AI military capabilities. US private AI investment hit US$109 billion in 2024 against China's US$9.3 billion. AI for Peace funding is several orders of magnitude smaller.

Frontier AI models systematically prefer escalation in simulated nuclear crises. In a study of 21 nuclear-crisis scenarios across three frontier models, 95 per cent featured nuclear signalling and 76 per cent strategic nuclear threats.

AI is also opening up new forms of accountability. Yale's Humanitarian Research Lab used satellite imagery to track 19,500 Ukrainian children deported to 210 Russian and Belarusian facilities.

5

AI, Conflict, and Peace

Overview

'Artificial intelligence without human oversight would leave the world blind, and perhaps nowhere more perilously and recklessly than in global peace and security.'

UN Secretary-General Antonio Guterres, December 2024

Artificial intelligence is reshaping how peace and conflict are waged, observed, and analysed. In this environment Positive Peace – the attitudes, institutions, and structures that sustain peaceful societies – becomes both more important and harder to build, because the technologies of conflict now spread faster than the institutions of peace.[1]

In the past year, there were more than 60 active state-based conflicts, thousands of terrorist attacks, and over 180,000 people killed in conflict, with drone use surging across both state and non-state groups, as shown in Figure 5.1. The same year also saw a surge in the deployment of AI in mediation, atrocity documentation, language access, and conflict early warning. The defining peace and conflict question of the late 2020s is no longer whether AI will reshape global peacefulness, but along which dimensions, at what speed, and to whose benefit.

Two trajectories are unfolding at once. On the first, AI is compressing the kill chain, lowering the marginal cost of lethality, and concentrating compute and capital in a handful of firms and states. On the second, AI is widening participation in peace processes, translating humanitarian information across hundreds of languages, accelerating the documentation of war crimes, and offering early-warning signals on conflict escalation that were impossible only a decade ago.

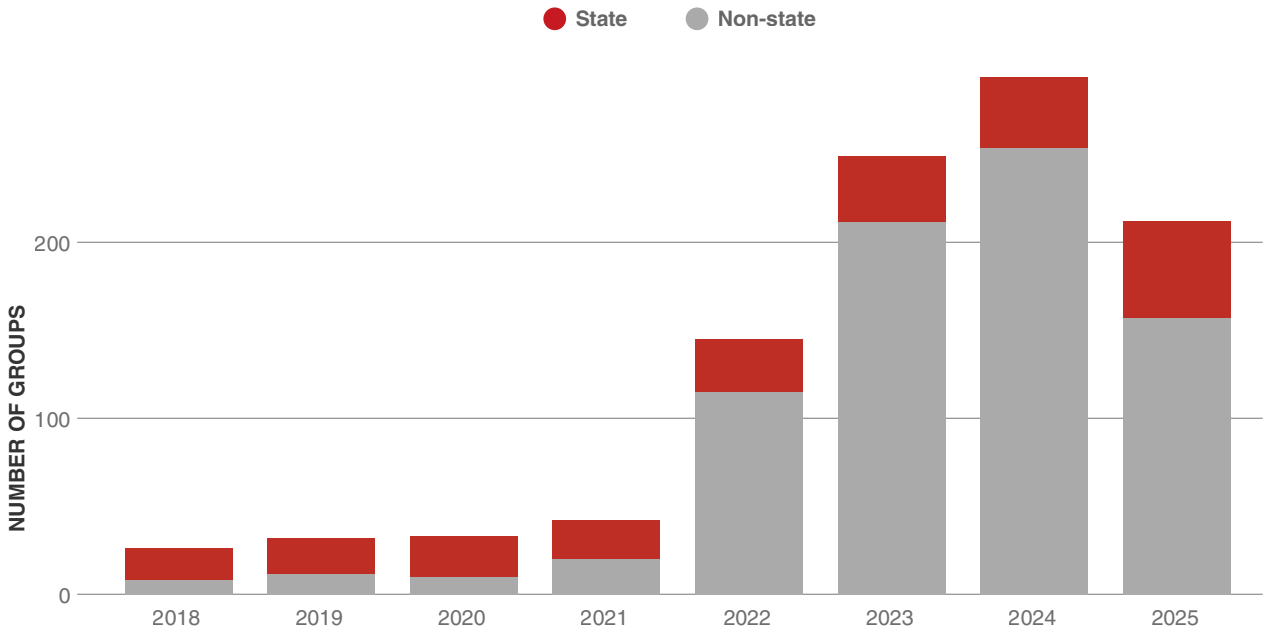
Both trajectories are accelerating, but they are not balanced: the infrastructure for AI-enabled war is already in the field, while the infrastructure for AI-enabled peace remains fragmented, underfunded, and largely uncoordinated.[2]

This section first looks at three conflicts where AI has been most extensively deployed: Ukraine, Gaza, and the Israel-Iran exchanges that culminated in Operation Epic Fury in early 2026.[3] From there, the section looks at AI's growing energy and compute demands, and the fragmented state of AI governance. It then sets out how AI can be used for Positive Peace, before closing on the choices facing policy makers from likely advances in AI over the next decade.

FIGURE 5.1

State and non-state groups recording at least one drone strike, 2018–2025

The number of states with a recorded drone strike has increased more than 200 per cent.



Source: ACLED, IEP calculations

AI in Modern Warfare: Ukraine, Gaza, Iran

Between 2022 and 2026, three conflicts have served as the operational test bed for AI in war. Ukraine shows how cheap, expendable autonomous hardware spreads at scale. Gaza shows how AI moves into the cognitive core of military targeting. The Israel-Iran exchanges show how AI now coordinates campaigns across multiple domains at machine speed.

Ukraine: Drone Warfare at Scale

The war in Ukraine is the most consequential testing ground for autonomous and AI-enabled systems in modern combat. By December 2025, Defence Minister Denys Shmyhal said Ukraine's Defence Procurement Agency had supplied 2.4 million first-person-view drones in a year, with total armed forces uptake on track for three million units.[4] Ukrainian production capacity is reported to have reached as many as five million drones in 2025, drawing on more than 500 domestic manufacturers via the Brave1 defence-tech accelerator launched in April 2023.[5]

Figure 5.2 shows drone strike events and resulting fatalities from 2018 to 2025; Ukraine is separated from the rest of the world to underscore its disproportionate contribution to global drone warfare. Recorded drone strike events rose more than a hundred-fold across the period, climbing from 364 in 2018 to over 42,000 in 2025. The pace of expansion accelerated sharply after Russia's invasion of Ukraine in 2022, and Ukraine's share of global activity has risen in every subsequent year.

Across the full 2018–2025 window, Ukraine accounted for almost 50 per cent of all drone strike events, a higher share than any other country. By 2025 that figure had reached 57 per cent. Russia is the next-largest single jurisdiction by event count, at 30.6 per cent. Almost all of these are Ukrainian deep-strike operations against Russian territory rather than a separate conflict. Taken together, the Russia-Ukraine war therefore accounts for roughly four out of every five drone strikes recorded worldwide since 2018.

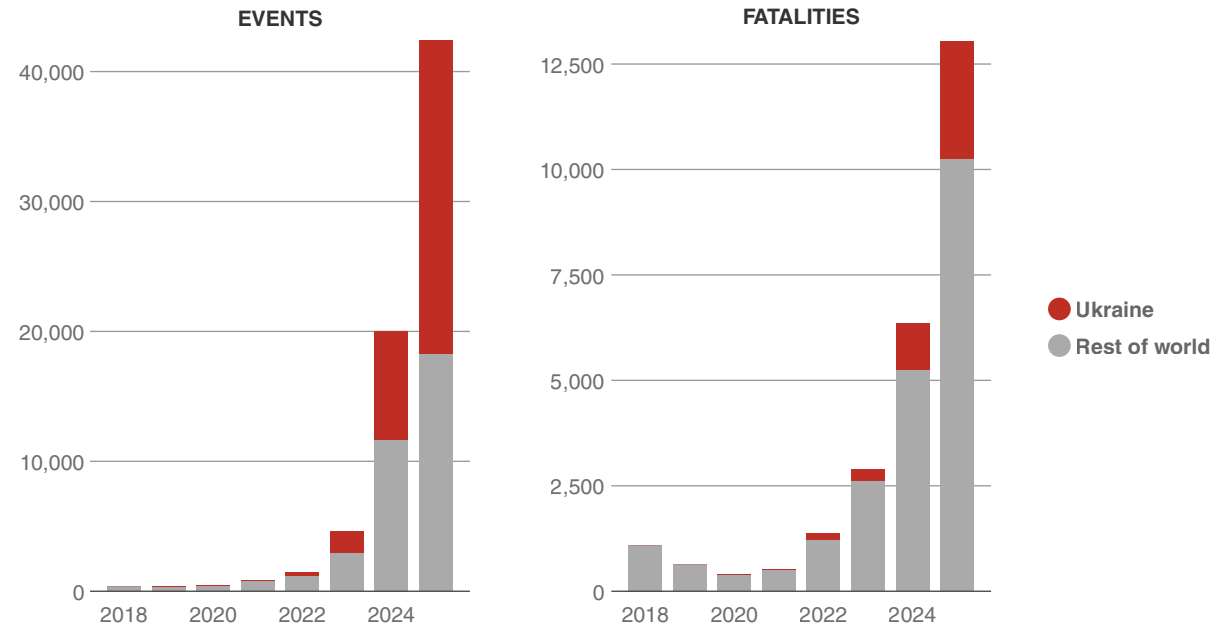
The fatalities panel tells a different story. While events are heavily concentrated in Ukraine, the lethality per strike has been much lower than in other theatres. Ukraine's share of cumulative drone strike fatalities is 16.5 per cent, well below its share of events, and Palestine is the most lethal theatre, accounting for 22 per cent of all drone strike fatalities despite accounting for only 2.6 per cent of events. Sudan, Myanmar, and Syria together add another 30 per cent of fatalities, underlining that drone use in active civil wars tends to produce higher per-event casualties.

Several Ukrainian systems now use machine vision and onboard AI in the final phase of a strike. The Saker Scout, approved for armed forces use in September 2023, can identify 64 categories of Russian military equipment and run autonomous strikes after losing GPS or radio link.[6] It works with Delta, Ukraine's NATO-compatible situational-awareness platform, and GIS Arta,

FIGURE 5.2

Drone strike events and fatalities worldwide, 2018–2025

Fifty-seven per cent of recorded drone strikes in the last year occurred in Ukraine.



Source: ACLED, IEP calculations

the artillery-fire-control system credited with cutting target-to-fire times from roughly 20 minutes to under one minute.[7] A growing fleet of unmanned ground systems, including the Lyut mini-tank, the Termit modular ground vehicle, and the devDroid family, now field AI-assisted target detection alongside conventional teleoperation.[8] Brave1 has also incubated Griselda, an intelligence-fusion platform that combines open-source, signals, and battlefield reporting for commanders.[9]

On the Russian side, the V2U loitering munition, first publicly identified by Ukraine's Main Intelligence Directorate in June 2025, shows how fast the threshold of meaningful human control is shifting. Analysis of intercepted V2U airframes confirmed that the drone uses an Nvidia Jetson Orin chip on a Chinese carrier board to autonomously find and select targets, with no operator link once airborne.[10] Russia has likely fielded a fully autonomous combat drone and continues to iterate despite civilian casualties. In one May 2025 incident, seven V2U units reportedly broke off a planned mission, autonomously formed a holding pattern, and coordinated attacks on a column of vehicles and civilians.[11] By mid-2025, Ukrainian intelligence estimated Russia was launching 30 to 50 V2U sorties a day.[12]

There have also been significant advances in drone usage by air force and navy units. On 31 December 2024, a Ukrainian Magura V5 unmanned surface vessel operated by HUR Group 13 became the first sea drone to shoot down a manned helicopter, downing a Russian Mi-8 near Cape Tarkhankut in occupied Crimea with R-73 air-to-air missiles.[13] In May 2025, a successor Magura V7 destroyed two Su-30 jets near Novorossiysk, the first time an unmanned vessel downed a fixed-wing aircraft.[14]

For most countries to date, drones are an important military innovation, but the revolution they represent is potential, not yet realised.[15] What gives Ukraine its global significance is the trajectory toward fully autonomous targeting, swarm coordination, and machine-speed engagement.

Major militaries have responded to the success of drone warfare in Ukraine and are institutionalising the approach. The US Department of Defense's Replicator initiative, announced by Deputy Defense Secretary Kathleen Hicks in August 2023, set out to field thousands of low-cost and expendable autonomous systems across multiple domains within 18 to 24 months.[16] Replicator 2, announced in late 2024, focused on counter-small-UAS defence of US installations.[17] In August 2025, Defense Secretary Pete Hegseth consolidated counter-drone activities under Joint Interagency Task Force 401.[18] At Camp Atterbury, Indiana, that same month, Epirus's Leonidas high-power microwave system defeated 61 of 61 drones across five scenarios, including a 49-drone swarm taken down by a single pulse.[19] Indo-Pacific Command's Admiral Samuel Paparo summed up the strategic logic in June 2024.[20]

Gaza: Algorithmic Targeting

If Ukraine shows AI hardware spreading at scale, Gaza shows AI moving into the cognitive core of military targeting. Two systems disclosed in *+972 Magazine* and *Local Call* have anchored the global debate. The first, Habsora ('The Gospel'), was described in November 2023 by an IDF spokesperson as a system that uses automatic tools to produce targets at a fast pace.[21] Former IDF Chief of Staff Aviv Kochavi told Ynet in June 2023 that once the system was activated, it generated 100 new targets a day, against a previous baseline of around 50 a year.[22]

The second system, Lavender, was disclosed in April 2024. According to one investigation, during the first weeks of the war the army almost entirely relied on Lavender, which flagged as many as 37,000 Palestinians as suspected militants.[23] Internal testing reportedly produced a 90 per cent accuracy rate, treated as sufficient for sweeping operational use, with the other 10 per cent known to be misidentifications.[24] Human operators often served as a rubber stamp, spending around 20 seconds per target before authorising a bombing, just to confirm the target was male.[25] A companion system, *Where's Daddy?,* tracked individuals on the Lavender list so strikes could happen when they returned home at night.[26] For junior operatives, commanders permitted up to 15 to 20 civilian deaths per strike.[27]

A joint investigation published in August 2025, drawing on a leaked Israeli military intelligence database, found that as of May 2025 it listed 8,900 Hamas and Palestinian Islamic Jihad fighters as dead or probably dead.[28] Set against around 53,000 Palestinian deaths recorded by Gaza health authorities at the time, the named-fighter share stood at roughly 17 per cent. Independent modelling puts the total much higher: a November 2025 study estimated 78,318 violent deaths between October 2023 and December 2024, with later updates suggesting cumulative conflict-related deaths in Gaza had likely passed 100,000 by October 2025 and that life expectancy had been cut by more than 30 years over two consecutive years.[29]

Similar targeting systems are being implemented by other advanced militaries. In the US, Project Maven, originally a 2017 Pentagon computer-vision pilot, has become a fully institutionalised combat platform. In May 2024, the Pentagon awarded Palantir a five-year, US$480 million contract to expand the Maven Smart System. By May 2025, the contract ceiling had risen by US$795 million to roughly US$1.3 billion, a 165 per cent expansion in 12 months.[30] US Central Command director of operations Schuyler Moore told Bloomberg that after the October 2023 attacks, Maven had become exceptionally critical to function, with targeting tempo rising sharply.[31]

Iran: Operational Planning and Strike Intensity

The third conflict where AI has played a crucial role has been the war in Iran. The June 2025 Twelve-Day War, in which Israeli and US strikes targeted Iranian nuclear facilities, was followed in February 2026 by the larger Operation Epic Fury, a coordinated multi-domain US and Israeli campaign against Iranian leadership, missile, and nuclear infrastructure.[32] According to US and Israeli statements, 200 Israeli aircraft struck around 500 targets and US forces conducted 900 strikes in the first 12 hours; Iran responded across nine countries with several hundred missiles and drones.[33] A Hudson Institute analysis found that Iranian missile salvos decreased 86 per cent within two weeks, attributed to the systematic destruction of mobile missile launchers identified through persistent surveillance and machine-vision target classification.[34]

Operation Epic Fury can thus be seen as an inflection point in how AI is being integrated into operational planning, kill-chain compression, and contested airspace.[35] The wider implication is that a campaign run at machine speed across multiple theatres, with humans validating rather than originating most targeting decisions, sets a new operational baseline. Military capabilities are evolving faster than the legal and governance frameworks meant to regulate them, and the role of human judgement within these systems is becoming less certain.[36]

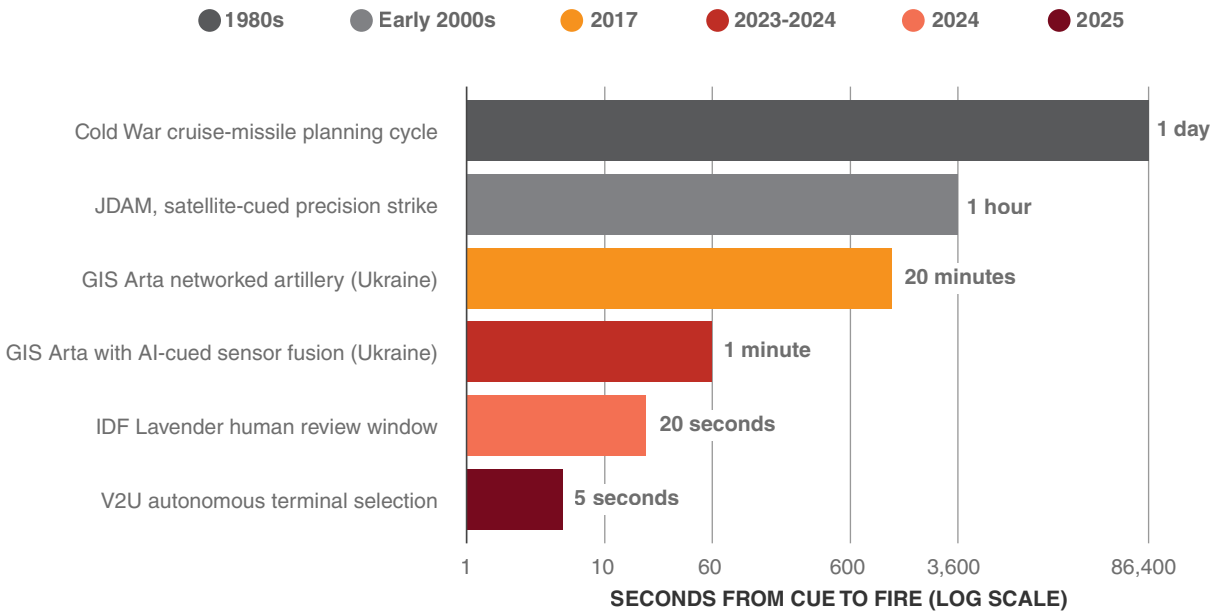
The three theatres show three distinct ways AI is being integrated into armed conflict. Ukraine shows cheap autonomous hardware at scale, with a tight feedback loop between civilian manufacturing and battlefield iteration. Gaza shows AI-driven cognitive targeting and the compression of human review to a window measured in seconds. The Israel-Iran exchanges show AI cueing across multiple domains at machine speed.

The combined impact of the advances in AI in warfare can be seen in Figure 5.3, which shows the evolution of target-to-fire times of key military targeting systems over the past 30 years. Advances in AI have led to significant 'kill-chain compression': targeting decisions that once took hours or days can now occur in a matter of minutes, or even seconds.

FIGURE 5.3

Target-to-fire times across military targeting systems

Targeting decisions that once took hours or days now take seconds.



Source: Doctrine and operational reporting compiled by IEP from Ukrainian armed forces statements, +972 Magazine and Local Call (2024), Bloomberg interview with U.S. CENTCOM (2024), Centre for Strategic and International Studies, IEP analysis

Future Warfare Risks

The conflicts profiled above show how AI is currently being used in warfare. However, the rapid advancement and uptake of AI technologies in warfare means that the number of potential threats and applications is likely to increase significantly in the next decade. These applications and threats are likely to come in one of three forms:

- Tactical threats, such as the use of AI-controlled drone swarms.
- Strategic threats, such as using AI to coordinate entire warfare operations.
- Existential threats, where AI control of critical decision-making systems could lead to mass-casualty events.

Tactical Threats

By 2030, the baseline usage of drones as seen in Ukraine, Gaza, and Iran is likely to spread. Counter-drone systems like Epirus's Leonidas, naval surface drones like the Magura family, and dedicated swarm-coordination software will mean that the cost of lethality keeps falling and the response time of human commanders keeps shrinking.[37]

Drone swarms are a particularly striking example. A drone swarm is a group of unmanned systems that operate as a coordinated whole rather than as a collection of individually piloted vehicles. Each drone runs onboard software for sensing, navigation, and target selection, and the drones share data with one another through a shared communication network rather than reporting back to a single operator. Coordination is distributed: the swarm allocates roles among its members, adapts to losses by reassigning tasks, and can converge on a target from multiple vectors simultaneously. Swarm sizes in operational use today range from several units to several dozen, while demonstration programs have flown hundreds of drones at once, and concept-of-operations documents in major militaries assume swarms in the thousands within the next decade.

The military significance of swarms rests on two properties. The first is mass: low unit cost makes each drone expendable, so a defender must either intercept every incoming drone or accept the strike, while the attacker only needs a fraction to get through. The second is saturation: existing air-defence systems, designed against small numbers of high-value missiles or aircraft, are not built to engage dozens of cheap targets in the same minute, and per-shot interceptor costs are often much higher than the drones they destroy. The combination shifts the cost curve of offence and defence in favour of the attacker and compresses decision time for the defender, since coordinated arrival patterns leave little room for human review of individual engagements. Ukraine, Russia, Israel, the United States, China, Iran, and Türkiye have all conducted operational tests or limited combat use of swarm-capable systems since 2021, leading to the rapid development of counter-swarm capability such as high-power microwave weapons and interceptor drones.

Strategic Threats

Development of AI systems with general cognitive capability has accelerated since mid-2024. Frontier labs have begun activating their highest internal safety protocols, citing the risk that AI could make chemical, biological, radiological, and nuclear weapons easier to build. A US congressional commission recommended in late 2024 that Congress fund a Manhattan Project-style program to race to Artificial General Intelligence.

The growth in capacity of AI systems means that they can be used in warfare for applications that go far beyond the tactical engagement layer. The most developed is theatre-level intelligence fusion: systems that pull satellite imagery, signals intelligence, open-source data, and battlefield reports into a single picture, using machine learning to spot patterns at a scale no human analyst can match. Course-of-action analysis and computational wargaming are heading the same way. US programs including DARPA's Strategic Chaos Engine for Planning and Air Combat Evolution are already running thousands of simulated campaigns and recommending force-employment options to commanders. Logistics and predictive maintenance also become strategic when AI can forecast ammunition use, anticipate equipment failure, and re-allocate supply across a theatre, because sustained operations depend on this layer rather than on the engagement layer above it.

Existential Threats

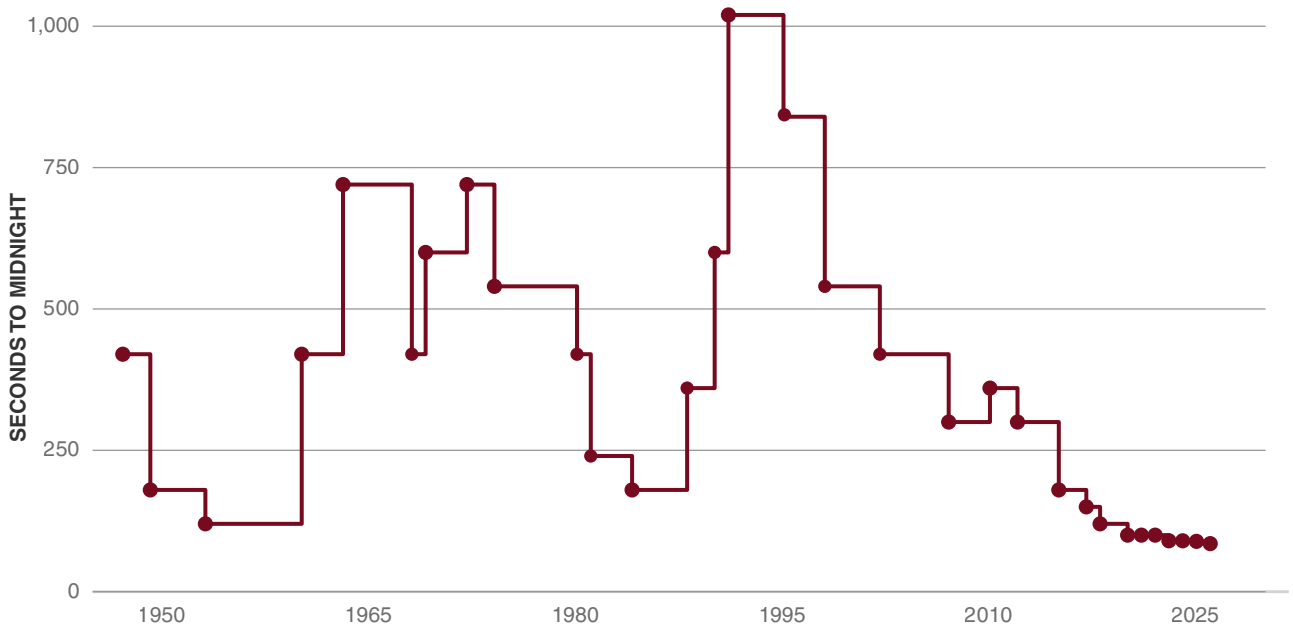
Over and above strategic threats, the use of AI in warfare could also have consequences so severe that they lead to catastrophic, irreversible outcomes. The most consequential of these concerns nuclear command and control. Fears about the potential consequences from the militarisation of AI are shown in Figure 5.4, which traces how close the Doomsday Clock is to midnight. The Doomsday Clock is a symbolic measure established at the beginning of the Cold War indicating how close humanity is to self-inflicted catastrophe, which is represented by the notion of midnight. It was originally used in the context of nuclear war, but it now includes threats related to climate change and emerging technologies.

The Bulletin of the Atomic Scientists set the Doomsday Clock at 89 seconds to midnight on 28 January 2025 and moved it to 85 seconds on 27 January 2026, the closest in its 79-year history, citing the expiration of the New START nuclear arms reduction treaty, climate trajectories, AI integration into militaries, and biosecurity concerns.[38] New START expired on 5 February 2026 with no successor agreement, despite the Russian Federation's September 2025 proposal for a one-year voluntary observance of central limits.[39]

FIGURE 5.4

Doomsday Clock setting, 1947–2026

Owing in part to concerns about AI, the Doomsday Clock is now closer to midnight than ever.



Source: Bulletin of the Atomic Scientists Doomsday Clock settings, IEP analysis

Two recent empirical studies highlight the risk of AI involvement in nuclear weapon decision making. Research presented in 2024 found that all five large language models tested escalated conflict in simulated diplomatic and military scenarios, in some cases to nuclear use.[40] A more recent study released in 2026 of 21 simulated nuclear-crisis scenarios across three frontier models found that 95 per cent of games featured nuclear signalling by at least one side, 95 per cent involved tactical nuclear use, and 76 per cent involved strategic nuclear threats. The research summary observed that the nuclear taboo does not seem to be as powerful for machines as for humans.[41]

'It is almost like the AI understands escalation, but not de-escalation. We do not really know why that is.'

Jacquelyn Schneider, Hoover Institute Wargaming and Crisis Simulation Initiative, 2025

Both superpowers have recognised this issue, with the Biden-Xi meeting in November 2024 affirming the need to keep human control over the decision to use nuclear weapons.[42] The same principle was reaffirmed by 61 states in the REAIM Seoul Blueprint of September 2024, and was the explicit subject of a dedicated UN resolution on AI in nuclear command, control, and communications adopted in November 2025.[43] Whether this principle holds, particularly under crisis instability between nuclear-armed states whose conventional forces increasingly rely on AI-mediated decision support, will define the stability of the nuclear order in the late 2020s. A 2025 assessment notes that integrating AI into nuclear decision pipelines, even where humans retain formal authority, increases the risk that decisions are made too quickly at exactly the points where deliberation is most needed.[44]

AI Concentration and Governance

As AI capabilities have increased rapidly, investment has also risen, with both compute and capital increasingly concentrated in a handful of countries. In 2024, US private AI investment reached US$109 billion, against China's US$9.3 billion and the United Kingdom's US$4.5 billion, and the US accounted for 40 notable frontier models against 15 from China and three from Europe.[45] At the same time, the cost of running these models has dropped dramatically, as shown in Figure 5.5. Inference for GPT-3.5-equivalent performance fell from about US$20 per million tokens in November 2022 to US$0.07 by October 2024, a 280-fold drop in less than two years.[46] Cheap inference combined with expensive training favours a small set of firms and states: those with the capital to build frontier models, and the customer base to spread the cost of inference across millions of users.

This concentration carries a direct energy cost. The International Energy Agency projects global data centre electricity consumption rising to around 945 terawatt-hours by 2030, more than double 2024 levels and exceeding Japan's current total demand.[47] The strain is already visible at country level. Data centres in Ireland accounted for 22 per cent of all metered electricity in 2024, a fourfold increase from five per cent in 2015.[48] At the firm level, the two largest hyperscale data-centre operators have reported sharp emissions growth driven by AI infrastructure: one disclosed that its total emissions across all categories rose 29.1 per cent from a 2020 baseline, and the other reported total greenhouse-gas emissions for 2023 of 14.3 million tonnes of carbon dioxide equivalent, a 48 per cent increase from 2019.[49]

Countries that host frontier-model training enjoy the upside of the AI economy, while those that only import AI services bear the rising cost of inference and the opportunity cost of foregone investment in their own energy infrastructure. Compute is no longer just a technical input; it is becoming a geopolitical category, a strategic resource over which states are willing to compete in the same way they once competed over oil refining capacity or semiconductor fabrication.

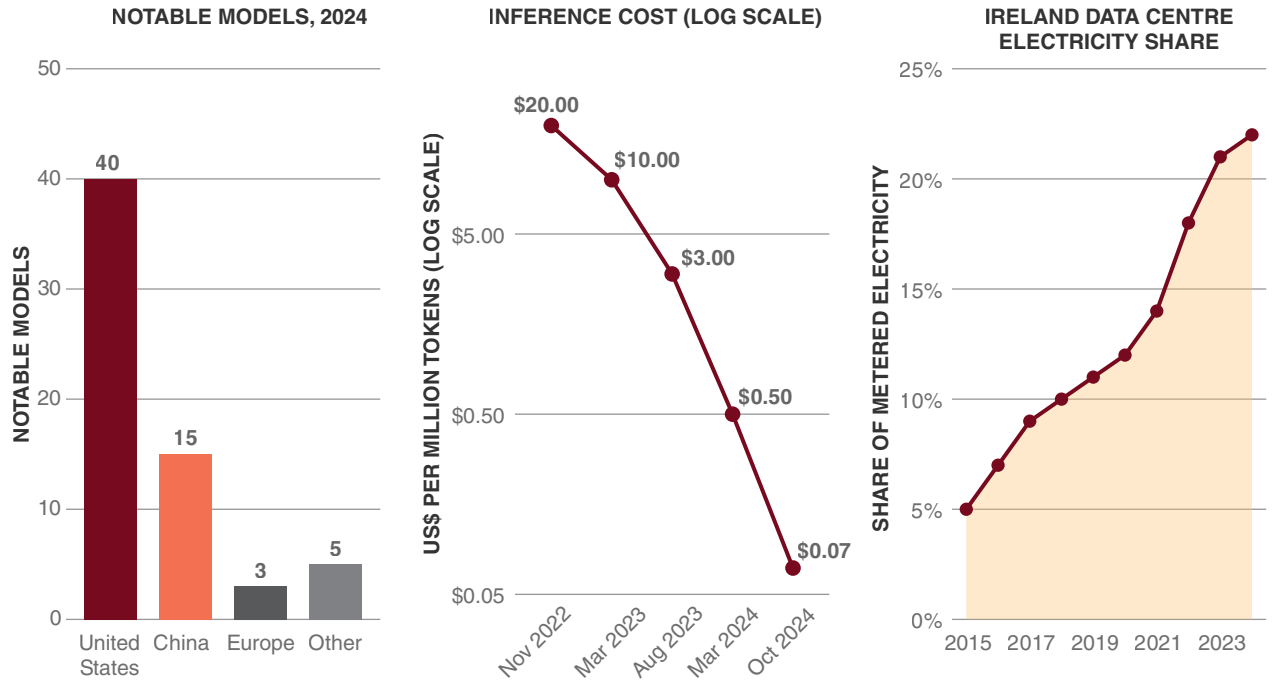
Governance

The international response to AI's emerging warfare applications has not yet settled into a coherent legal framework. Governance has emerged instead as a series of overlapping summits, declarations, voluntary commitments, regional regulations, and UN resolutions, each addressing a different slice of the problem and each with a different set of participating states. The trajectory is one of accelerating activity rather than coordinated control, and the gap between deployment and rule-making has widened, not closed, since 2023.

FIGURE 5.5

Compute concentration: production, cost, and grid impact

The cost of AI inference has collapsed, but its production and energy footprint remain highly concentrated.



Source: Stanford AI Index 2025, Epoch AI, Ireland Central Statistics Office, IEP analysis

The most visible track is the series of AI Safety Summits. The first, held at Bletchley Park, England, in November 2023, produced the Bletchley Declaration, endorsed by 28 countries and the European Union (EU).[50] Six months later, the Seoul Summit of May 2024 added detail, producing the Seoul Declaration, a Statement of Intent on AI Safety Science, the Frontier AI Safety Commitments from 16 leading developers, and a Ministerial Statement endorsed by 27 countries plus the EU.[51]

However, this trajectory of increasing cooperation broke at the Paris AI Action Summit in February 2025. The closing Statement on Inclusive and Sustainable AI for People and the Planet was signed by 61 countries, but the United States and the United Kingdom declined to sign, marking the first major split between the original Bletchley signatories.[52]

Figure 5.6 shows the number of major AI governance instruments that countries worldwide are part of. There were 118 countries that were not parties to any of the seven major governance initiatives.

At the regional level, the Council of Europe Framework Convention on AI and Human Rights, Democracy and the Rule of Law opened for signature in Vilnius in September 2024, with the US, the UK, the EU, and several other Council member states among the initial signatories.[53]

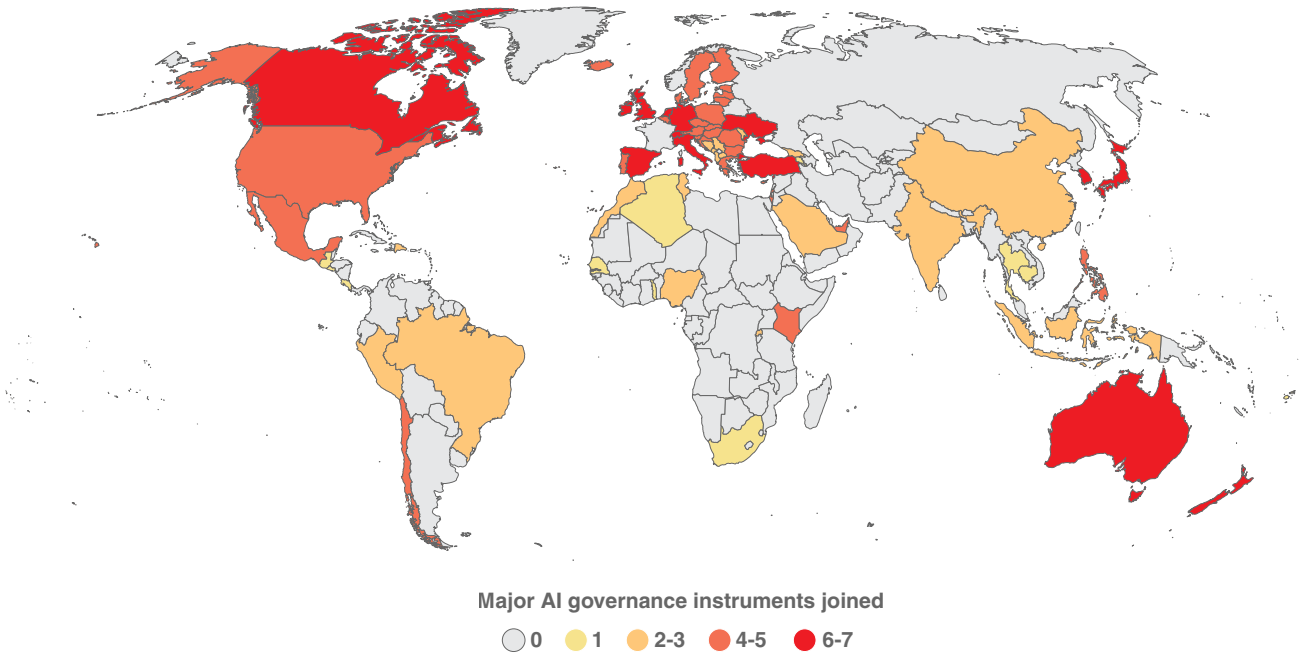
At the global level, the UN General Assembly took its first major step on AI governance through a resolution in August 2025, which set up an Independent International Scientific Panel on AI of 40 members and a Global Dialogue on AI Governance, both anchored in the UN's Pact for the Future and the Global Digital Compact.[54] The first session of the Global Dialogue ran in September 2025; the second is scheduled for the International Telecommunication Union's AI for Good Summit in Geneva in 2026.[55]

The UN also adopted a draft resolution on lethal autonomous weapons in November 2025, and the General Assembly plenary endorsed it a month later.[56] The same plenary adopted a separate resolution on the risks of integrating AI into nuclear command, control, and communications systems, the first dedicated General Assembly action on AI in nuclear command and control. Together, the two resolutions establish a near-universal political baseline for the principle that humans should retain meaningful control over lethal force and over nuclear release, even though both resolutions remain non-binding.

FIGURE 5.6

Country participation in major AI governance instruments, 2023–2026

The countries shaping AI have the fewest governance commitments in common.



Source: UK Government, Republic of Korea Ministry of Foreign Affairs, French Republic, Council of Europe, REAIM Summit communiques, US Department of State, IEP compilation

AI for Peace

AI is not only being used to shorten kill chains and enhance coordination capacity in wartime. A parallel set of applications, smaller in scale but expanding quickly, uses the same underlying technologies to support peacebuilding, mediation, atrocity documentation, language access, and early warning of conflict. A September 2025 meta-review of more than 600 documents in the field found that these tools are showing consistent value across multiple use cases, but face acute and persistent gaps in funding, evaluation methodology, and human-rights safeguards.[57] In budget terms, documented AI for Peace programs operate three to four orders of magnitude below the scale of frontier-AI investment, as shown in Figure 5.7. The asymmetry is so large that AI for Peace is best understood not as a counterweight to military AI, but as a parallel ecosystem that has emerged in spite of, rather than because of, the dominant investment pattern.

Mediation and Deliberation

The most developed applications of AI for Peace are in mediation and inclusive dialogue. Within the UN system, the Innovation Cell of the Department of Political and Peacebuilding Affairs has built machine translation, sentiment analysis, and large-scale text-clustering tools into active mediation work across Libya, Yemen, Iraq, Lebanon, Haiti, and Bolivia. These tools allow mediators to process community submissions at a scale that would otherwise be impossible to read manually, and they make it harder for any single faction to dominate the consultation record.[58]

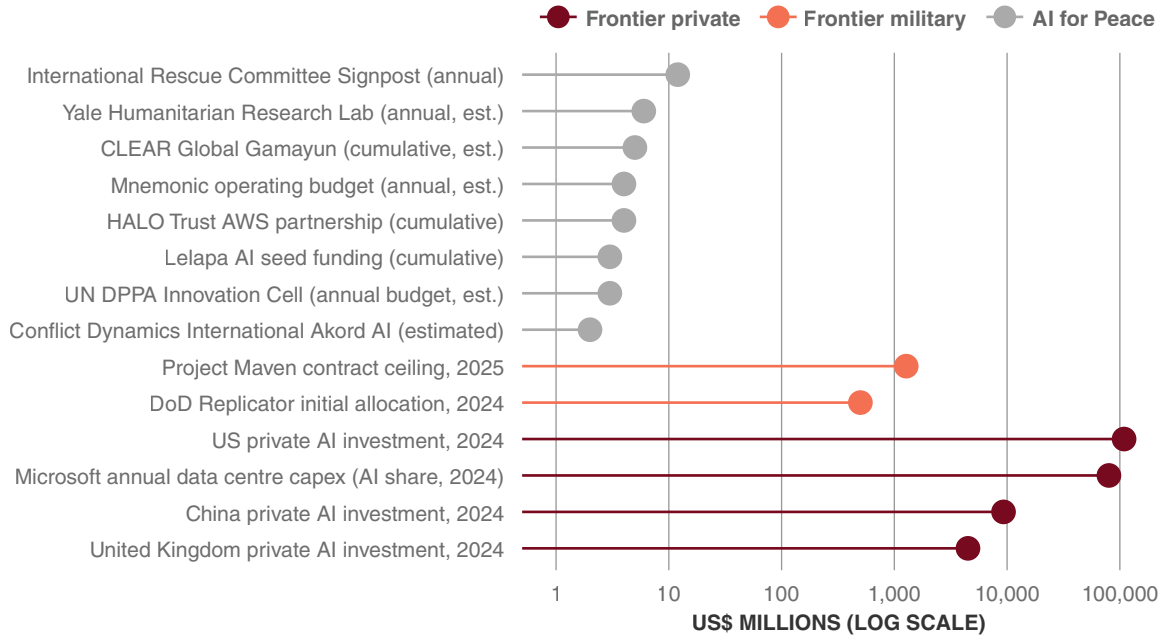
Outside the UN, civil-society mediators have run similar processes. In 2023, the Crisis Management Initiative used the Remesh platform to run a real-time Sudanese women's dialogue with up to 1,000 participants, building on earlier processes in Yemen and Libya.[59] The Centre for Humanitarian Dialogue's Libyan National Conference Process, though mostly in person, brought together 7,000 participants across 75 sessions in 43 locations and reached an estimated 1.8 million Libyans through digital channels.[60] In November 2024, Conflict Dynamics International launched Akord AI, the first AI co-pilot built specifically for peacebuilders, trained on around 1,500 documents on the Sudan conflict and operating in Arabic and English.[61]

AI is also moving into structured deliberation at a scale that human mediation alone cannot match. A 2024 study tested an AI consensus-building system known as the Habermas Machine with more than 5,700 UK participants on divisive issues including Brexit and immigration. The system produced consensus statements that participants rated clearer, more informative, and less biased than those produced by human mediators, and it measurably reduced group division.[62] In parallel, the open-source deliberation platform Polis has been used at national scale through Taiwan's vTaiwan process, where roughly 80 per cent of the 26 issues debated led to government action between 2015 and 2018, making it one of the few examples of structured public deliberation producing direct policy change at scale.[63]

FIGURE 5.7

AI investment asymmetry: private, military, and peace investment

Investment in AI for Peace represents a tiny fraction of private and military investment.



Source: Stanford AI Index 2025, US Department of Defense contract notices, IPIE 2025, organisation reports, IEP calculations

Language Access, Atrocity Documentation, and Community Resilience

Language access is the second area where AI is making a measurable difference for peace. The free flow of information depends on whether people can participate in public life in their own languages, and a large fraction of the world's languages are still under-served by commercial translation systems. Meta's No Language Left Behind system, released in 2024, supports 200 languages and improves average translation quality by 44 per cent over previous systems, with a deliberate focus on low-resource African and South Asian languages.[64]

Smaller initiatives are filling specific gaps: CLEAR Global's Gamayun initiative is working to bring ten marginalised languages online for humanitarian use,[65] and Lelapa AI, founded in Johannesburg in 2022, has released the Vulavula API and the InkubaLM small language model covering five African languages spoken by around 364 million people.[66] At the delivery end, the International Rescue Committee's Signpost humanitarian information service now reaches more than 20 million people directly across nearly 30 countries and 25 languages, with social-media reach above 100 million.[67]

AI is also reshaping accountability for atrocities. Documentation organisations are using machine learning to process volumes of open-source evidence such as satellite imagery, social-media posts, and leaked databases that would once have required years of manual review. The Berlin-based archive Mnemonic, which runs the Syrian, Yemeni, Sudanese, and Ukrainian archives, has preserved more than 15 million digital records of human-rights violations.[68] Yale's Humanitarian Research Lab produced more than 65 reports during the El Fasher siege in Sudan, including a joint March 2026 report with NASA Harvest showing that Rapid Support Forces deliberately razed at least 41 farming communities, of which 28 were depopulated, with farmland cut by 82 per cent.[69] The same lab's Conflict Observatory verified 19,500 children deported from Ukraine to Russia and Belarus across at least 210 facilities.[70]

The same techniques are being used for post-conflict recovery. In demining, the HALO Trust's partnership with AWS has applied machine-learning models to 11 terabytes of drone imagery from Ukrainian minefields. The result is a reduction in the time from data capture to actionable map from days to hours, which clears land for return and reconstruction much faster than was previously possible.[71] In damage assessment, UNOSAT's October 2025 Gaza analysis identified 198,273 affected structures, of which 123,464 were destroyed, with roughly 81 per cent of all structures in the Gaza Strip damaged. Without automated satellite analysis at this scale, the magnitude of destruction would have become clear only months or years later, with significant implications for reconstruction planning, humanitarian access, and any future legal proceedings.[72]

These projects differ in maturity, geographic focus, and the quality of their evaluation, but they share a common logic: each uses AI to broaden participation, accelerate evidence collection, or shorten the feedback loop between communities and the institutions that affect them. They sit outside the dominant model of military AI procurement, with different funders, different incentives, and different metrics of success. In budget terms they remain a small fraction of total global AI investment. AI can already widen participation, strengthen peace processes, and help societies confront conflict without violence. Whether it does so in practice depends on resourcing and design, not capability.[73] The capability exists; what is missing is investment at a scale that matches the technology's potential, and a governance architecture that recognises peacebuilding applications as a public good, worthy of funding alongside rather than after the military and commercial uses that currently dominate the field.

Appendices

APPENDIX A

GPI Methodology

Peace is notoriously difficult to define. The simplest way of approaching it is in terms of the harmony achieved by the absence of violence or the fear of violence, which has been described as negative peace. Negative peace is a complement to Positive Peace which is defined as the attitudes, institutions and structures that create and sustain peaceful societies.

The GPI was founded by Steve Killelea, an Australian technology entrepreneur and philanthropist. It is produced by the Institute for Economics & Peace, a global think tank dedicated to developing metrics to analyse peace and to quantify its economic benefits.

The GPI measures a country's level of negative peace using three domains of peacefulness. The first domain, *Ongoing Domestic and International Conflict,* uses six statistical indicators to investigate the extent to which countries are involved in internal and external conflicts, as well as their role and duration of involvement in conflicts.

The second domain evaluates the level of harmony or discord within a nation; eleven indicators broadly assess what might be described as *Societal Safety and Security*. The assertion is that low crime rates, minimal terrorist activity and *violent demonstrations,* harmonious *relations with neighbouring countries,* a stable political scene and a small proportion of the population being internally displaced or made refugees can be equated with peacefulness.

Six further indicators are related to a country's *Militarisation* —reflecting the link between a country's level of military build-up and access to weapons and its level of peacefulness, both domestically and internationally. Comparable data on *military expenditure* as a percentage of GDP and the number of armed service officers per head are gauged, as are financial contributions to UN peacekeeping missions.

The expert panel

An international panel of independent experts played a key role in establishing the GPI in 2007—in selecting the indicators that best assess a nation's level of peace and in assigning their weightings. The panel has overseen each edition of the GPI; this year, it included:

Professor Kevin P. Clements, chairperson
Foundation Chair of Peace and Conflict Studies and Director, National Centre for Peace and Conflict Studies, University of Otago, New Zealand

Dr. Sabina Alkire
Director, Oxford Poverty & Human Development Initiative (OPHI), University of Oxford, United Kingdom

Dr. Ian Anthony
Research Analyst, Swedish Defence Research Agency

Dr. Manuela Mesa
Director, Centre for Education and Peace Research (CEIPAZ) and President, Spanish Association for Peace Research (AIPAZ), Madrid, Spain

Dr. Ekaterina Stepanova
Head, Unit on Peace and Conflict Studies, Institute of the World Economy and International Relations (IMEMO), Russian Academy of Sciences, Russia

The Indicators

The GPI comprises 23 indicators of the absence of violence or fear of violence. The indicators were originally selected with the assistance of the expert panel in 2007 and have been reviewed by the expert panel on an annual basis. All scores for each indicator are normalised on a scale of 1-5, whereby qualitative indicators are banded into five groupings and quantitative ones are scored from 1 to 5, to the third decimal point.

ONGOING DOMESTIC & INTERNATIONAL CONFLICT

- **Number and duration of internal conflicts**
  Uppsala Conflict Data Program (UCDP) Battle-Related Deaths Dataset, Non-State Conflict Dataset and One-sided Violence Dataset; Institute for Economics & Peace (IEP)
- **Number of deaths from external organised conflict**
  UCDP Georeferenced Event Dataset
- **Number of deaths from internal organised conflict**
  UCDP Georeferenced Event Dataset
- **Number, duration and role in external conflicts**
  UCDP Battle-Related Deaths Dataset; IEP
- **Intensity of organised internal conflict**
  Institute of Economics & Peace (IEP)
- **Relations with neighbouring countries**
  Qualitative assessment by EIU analysts

SOCIETAL SAFETY & SECURITY

- **Level of perceived criminality in society**
  Gallup World Poll, IEP estimates
- **Number of refugees and internally displaced people as a percentage of the population**
  Office of the High Commissioner for Refugees (UNHCR) Mid-Year Trends; Internal Displacement Monitoring Centre (IDMC)
- **Political instability**
  Qualitative assessment by EIU analysts
- **Political Terror Scale**
  Gibney, Mark, Linda Cornett, Reed Wood, Peter Haschke, Daniel Arnon, and Attilio Pisanò. 2025. The Political Terror Scale 1976-2024. Date Retrieved, from the Political Terror Scale website: http://www.politicalterrorscale.org.
- **Impact of terrorism**
  IEP Global Terrorism Index (GTI)
- **Number of homicides per 100,000 people**
  United Nations Office on Drugs and Crime (UNODC) Surveys on Crime Trends and the Operations of Criminal Justice Systems (CTS); EIU estimates
- **Level of violent crime**
  Gallup World Poll, IEP estimates
- **Violent demonstrations**
  Armed Conflict Location and Event Data Project (ACLED); IEP
- **Number of jailed population per 100,000 people**
  World Prison Brief, Institute for Criminal Policy Research at Birkbeck, University of London
- **Number of internal security officers and police per 100,000 people**
  UNODC CTS
- **Ease of access to small arms and light weapons**
  Small Arms Survey, IEP estimates

MILITARISATION

- **Military expenditure as a percentage of GDP**
  The Military Balance, IISS, EIU Estimates
- **Number of armed services personnel per 100,000 people**
  The Military Balance, IISS
- **Volume of transfers of major conventional weapons as recipient (imports) per 100,000 people**
  Stockholm International Peace Research Institute (SIPRI) Arms Transfers Database
- **Volume of transfers of major conventional weapons as supplier (exports) per 100,000 people**
  SIPRI Arms Transfers Database
- **Financial contribution to UN peacekeeping missions**
  United Nations Committee on Contributions; IEP
- **Nuclear and heavy weapons capabilities**
  Military Balance+, IISS; IEP

Methodological Notes

WEIGHTING THE INDEX

When the GPI was launched in 2007 the advisory panel of independent experts apportioned scores based on the relative importance of each of the indicators on a scale of 1-5. Two sub-component weighted indices were then calculated from the GPI group of indicators:

1. A measure of how internally peaceful a country is;
2. A measure of how externally peaceful a country is (its state of peace beyond its borders).

The overall composite score and index was then formulated by applying a weight of 60 per cent to the measure of internal peace and 40 per cent to external peace. The heavier weight applied to internal peace was agreed upon by the advisory panel, following robust debate. The decision was based on the notion that a greater level of internal peace is likely to lead to, or at least correlate with, lower external conflict. The weights have been reviewed by the advisory panel prior to the compilation of each edition of the GPI.

MEASURING THE ROBUSTNESS OF THE INDEX

- Robustness is an important concept in composite index analysis. It is a measure of how often rank comparisons from a composite index are still true if the index is calculated using different weightings. For example, if the GPI is recalculated using a large number of different weighting schemes and Country A ranks higher than Country B in 60 per cent of these recalculations, the statement "Country A is more peaceful than Country B" is considered to be 60 per cent robust.
- IEP finds that the Global Peace Index (GPI) is at the same level of absolute robustness as the Human Development Index (HDI), a leading measure of development since it was first constructed by the United Nations Development Programme in 1990.
- Technically, the robustness of the GPI is measured by the fact that 70 per cent of pairwise country comparisons are independent of the weighting scheme chosen. In other words, regardless of the weights attributed to each component of the index, 70 per cent of the time the pairwise comparisons between countries are the same.

The GPI is a composite index of 23 indicators weighted and combined into one overall score. The weighting scheme within any composite index represents the relative importance of each indicator to the overall aim of the measure, in the GPI's case, global peace. To fully understand the representative nature or accuracy of any measure it is necessary to understand how sensitive the results of the index are to the specific weighting scheme used. If the analysis holds true for a large subset of all possible weighting schemes then the results can be called robust. While it is expected that ranks will be

TABLE A.1

Indicator weights on the GPI

Internal Peace 60% / External Peace 40%

INTERNAL PEACE (Weight 1 to 5)	
Perceptions of criminality	3
Security officers and police rate	3
Homicide rate	4
Incarceration rate	3
Access to small arms	3
Intensity of internal conflict	5
Violent demonstrations	3
Violent crime	4
Political instability	4
Political terror	4
Weapons imports	2
Terrorism impact	2
Deaths from internal conflict	5
Internal conflicts fought	2.56

EXTERNAL PEACE (Weight 1 to 5)	
Military expenditure (% of GDP)	2
Armed services personnel rate	2
UN peacekeeping funding	2
Nuclear and heavy weapons capabilities	3
Weapons exports	3
Refugees and IDPs	4
Neighbouring countries relations	5
External conflicts fought	2.28
Deaths from external conflict	5

sensitive to changes in the weights of any composite index, what is more important in a practical sense is the robustness of country comparisons. One of the core aims of the GPI is to allow for Country A to be compared to Country B. This raises the question that for any two countries, how often is the first ranked more peaceful than the second across the spectrum of weights. The more times that the first country is ranked more peaceful than the second, the more confidence can be invested in the statement "Country A is more peaceful than Country B".

To avoid the computational issue of evaluating every possible combination of 23 indicators, the robustness of pairwise country comparisons has been estimated using the three GPI domains militarisation, societal safety and security and ongoing conflict. Implementing an accepted methodology for robustness, the GPI is calculated for every weighting combination of three weights from 0 to 1 at 0.01 intervals. For computational expedience only weighting schemes that sum to one are selected, resulting in over 5100 recalculated GPI's. Applying this, it is found that around 70 per cent of all pairwise country comparisons in the GPI are independent of the weighting scheme, i.e. 100 per cent robust. This is a similar level of absolute robustness as the Human Development Index.

QUALITATIVE SCORING: THE ECONOMIST INTELLIGENCE UNIT APPROACH

The EIU's Country Analysis team plays an important role in producing the GPI by scoring three qualitative indicators and filling in data gaps on quantitative indicators when official data is missing. The EIU employs more than 100 full-time country experts and economists, supported by 650 in-country contributors. Analysts generally focus on two or three countries and, in conjunction with local contributors, develop a deep knowledge of a nation's political scene, the performance of its economy and the society in general. Scoring follows a strict process to ensure reliability, consistency and comparability:

1. Individual country analysts score qualitative indicators based on a scoring methodology and using a digital platform;
2. Regional directors use the digital platform to check scores across the region; through the platform they can see how individual countries fare against each other and evaluate qualitative assessments behind proposed score revisions;
3. Indicator scores are checked by the EIU's Custom Research team (which has responsibility for the GPI) to ensure global comparability;
4. If an indicator score is found to be questionable, the Custom Research team, and the appropriate regional director and country analyst discuss and make a judgment on the score;
5. Scores are assessed by the external advisory panel before finalising the GPI;
6. If the expert panel finds an indicator score to be questionable, the Custom Research team, and the appropriate regional director and country analyst discuss and make a final judgment on the score, which is then discussed in turn with the advisory panel.

Because of the large scope of the GPI, occasionally data for quantitative indicators do not extend to all nations. In this case, country analysts are asked to suggest an alternative data source or provide an estimate to fill any gap. This score is checked by Regional Directors to ensure reliability and consistency within the region, and by the Custom Research team to ensure global comparability. Again, indicators are assessed by the external advisory panel before finalisation.

APPENDIX B

GPI Indicator Sources, Definitions & Scoring Criteria

The information below details the sources, definitions, and scoring criteria of the 23 indicators that form the Global Peace Index. All scores for each indicator are banded or normalised on a scale of 1-5, whereby qualitative indicators are banded into five groupings and quantitative ones scored continuously from 1 to 5 at the third decimal place. The Economist Intelligence Unit has provided imputed estimates in the rare event there are gaps in the quantitative data.

INTERNAL PEACE INDICATORS

Level of Perceived Criminality in Society

Indicator type	Quantitative
Indicator weight	3
Indicator weight (% of total index)	3.8%
Data source	Gallup World Poll
Measurement period	2025

Definition: This indicator uses a question from the Gallup World Poll as the basis for perceptions of criminality. The exact wording of the question is: "*Do you feel safe walking alone at night in the city or area where you live?*" IEP calculates the indicator score based on the percentage of people who answer 'no' to this question.

Where data is not available, IEP uses multivariate imputation by chained equations to create country-level estimates.

Scoring Bands

1/5	2/5	3/5	4/5	5/5
0–19.9%	20–39.9%	40–59.9%	60–79.9%	> 80%

Number of Internal Security Officers and Police per 100,000 People

Indicator type	Quantitative
Indicator weight	3
Indicator weight (% of total index)	3.8%
Data source	UNODC Survey of Crime Trends and Operations of Criminal Justice Systems
Measurement period	2024

Alternative Source: EIU. Where data is not provided, the EIU's analysts have filled them based on likely scores from the set bands of the actual data.

Definition: This indicator is sourced from the UNODC Survey of Crime Trends and Operations of Criminal Justice Systems and refers to the civil police force. Police refers to personnel in public agencies whose principal functions are the prevention, detection and investigation of crime and the apprehension of alleged offenders. It is distinct from national guards or local militia.

Scoring Bands

1/5	2/5	3/5	4/5	5/5
0–199.8	199.9–399.8	399.9–599.8	599.9–799.8	> 799.9

Number of Homicides per 100,000 People

Indicator type	Quantitative
Indicator weight	4
Indicator weight (% of total index)	5%
Data source	UNODC Survey of Crime Trends and Operations of Criminal Justice Systems
Measurement period	2024

Alternative Source: EIU. Where data is not provided, the EIU's analysts have filled them based on likely scores from the set bands of the actual data.

Definition: This indicator comes from the UNODC Survey of Crime Trends and Operations of Criminal Justice Systems. Intentional homicide refers to death deliberately inflicted on a person by another person, including infanticide. The figures refer to the total number of penal code offences or their equivalent, but exclude minor road traffic and other petty offences, brought to the attention of the police or other law enforcement agencies and recorded by one of those agencies.

Scoring Bands

1/5	2/5	3/5	4/5	5/5
0–1.99	2–5.99	6–9.99	10–19.99	> 20

Number of Jailed Population per 100,000 People

Indicator type	Quantitative
Indicator weight	3
Indicator weight (% of total index)	3.8%
Data source	Institute for Criminal Policy Research at Birkbeck, University of London, World Prison Brief
Measurement period	2025

Definition: Figures are from the Institute for Criminal Policy Research and are compiled from a variety of sources. In almost all cases the original source is the national prison administration of the country concerned, or else the Ministry responsible for the prison administration. Prison population rates per 100,000 people are based on estimates of the national population. In order to compare prison population rates, and to estimate the number of persons held in prison in the countries for which information is not available, median rates have been used by the Institute for Criminal Policy Research to minimise the effect of countries with rates that are untypically high or low. Indeed, comparability can be compromised by different practice in different countries, for example with regard to pre-trial detainees and juveniles, but also psychiatrically ill offenders and offenders being detained for treatment for alcoholism and drug addiction.

Scoring Bands

1/5	2/5	3/5	4/5	5/5
0-126.405	126.406-252.811	252.812-379.217	379.218-505.624	>505.625

Additional Notes: The data provided by the Institute for Criminal Policy Research are not annual averages but indicate the number of jailed population per 100,000 inhabitants in a particular month during the year. The year and month may differ from country to country.

Availability of Small Arms

Indicator type	Qualitative
Indicator weight	3
Indicator weight (% of total index)	3.80%
Data source	Small Arms Survey
Measurement period	Various

Definition: Data on the availability of small arms is drawn from the Small Arms Survey's *Global Firearms Holdings* database, the most comprehensive cross-national estimate of civilian firearm ownership currently available. Figures are typically expressed as the number of civilian-held firearms per 100 residents, allowing for population-adjusted cross-country comparison. The country-level estimates are constructed from multiple sources, such as national firearms registries, household and expert surveys, and, where direct data are unavailable, statistical comparison with similar countries, and include both registered (licit) and unregistered (illicit) firearms.

Scoring Cutoff (ownership rate)

1	2	3	4	5
0	15	30	45	60

Intensity of Internal Conflict

Indicator type	Qualitative
Indicator weight	5
Indicator weight (% of total index)	6.30%
Data source	IEP
Measurement period	2025

Definition: The intensity of internal conflict indicator uses a structured 1–9 scale assessed by a large language model grounded in web search. For each country-year, the model works down the scale from 9 to 1, judging whether the evidence meets each level, then selects the highest level that is clearly met and justifies why the country-year does not sit one level higher or lower.

Score	Level of Conflict
1	Baseline Structural Grievances
1.5	Non-Violent Mobilization
2	Heightened Rhetoric and Polarization
2.5	Institutional Strain and Political Impasse
3	Isolated Incidents of Low-Level Violence
3.5	Localized Organized Violence Geographic Diffusion of Organized
4	Violence
4.5	State of Emergency
4	Armed Conflict

Violent Demonstrations

Indicator type	Qualitative
Indicator weight	3
Indicator weight (% of total index)	3.8%
Data source	ACLED
Measurement period	2025

Definition: The indicator reflects the number and severity of violent demonstrations in a country for a give year. Scores vary from 1 to 5, with values close to 1 representing infrequent violent demonstrations and scores close to 5 representing frequent demonstrations with high numbers of fatalities. The data includes four types of events as classified by ACLED: "Protest with intervention" (weighted at 1), "Excessive force against protesters" (weight 2), "Violent demonstration" (weight 3), and "Mob violence" (weight 4). Note that this set of event types means that the indicator includes violent protests, riots etc, but also protests that were originally peaceful but were repressed violently by security forces. For each type of event the number of incidents and the number of fatalities are calculated. Fatalities are weighted more heavily than the number of incidents, as a gauge of incident severity. Where ACLED data are not available a transformation was used to adapt raw data from the Cross National Time Series (CNTS) data for imputation.

Score interpretation guidance

1/5	Very rare incidents of violent demonstrations, protests are almost all peaceful.
2/5	A few violent protests, mostly without fatalities.
3/5	A few violent protests or protests repressed violently by security forces. Some fatalities.
4/5	Frequent protests with violence, with a material number of fatalities.
5/5	Large number of protests with large number of fatalities. Number of incidents and fatalities are large by international and historical standards.

Level of Violent Crime

Indicator type	Qualitative
Indicator weight	4
Indicator weight (% of total index)	5%
Data source	Gallup World Poll
Measurement period	2025

Definition: This indicator uses a question from the Gallup World Poll as the basis for the level of violent crime. The exact wording of the question is: "Within the past 12 months, have you been assaulted or mugged? "IEP calculates the indicator score based on the percentage of people who answer 'no' to this question. Where data is not available, IEP uses multivariate imputation by chained equations to create country-level estimates.

Scoring Cutoff (% victimised)

1	2	3	4	5
0	15	30	45	60

Political Instability

Indicator type	Qualitative
Indicator weight	4
Indicator weight (% of total index)	5%
Data source	EIU
Measurement period	March 2025 to March 2026

Definition: Assessment of political instability ranked from 0 to 100 (very low to very high instability) by the EIU's Country Analysis team, based on five questions. This indicator aggregates five other questions on social unrest, orderly transfers, opposition stance, excessive executive authority and an international tension sub-index. Country analysts assess this question on a quarterly basis.

Specific Questions:

- What is the risk of significant social unrest during the next two years?
- How clear, established and accepted are constitutional mechanisms for the orderly transfer of power from one government to another?
- How likely is it that an opposition party or group will come to power and cause a significant deterioration in business operating conditions?
- Is excessive power concentrated or likely to be concentrated in the executive so that executive authority lacks accountability and possesses excessive discretion?
- Is there a risk that international disputes/tensions will negatively affect the economy and/or polity?

Scoring Bands

1/5	2/5	3/5	4/5	5/5
0–20.4	20.5–40.4	40.5–60.4	60.5–80.4	80.5–100

Political Terror Scale

Indicator type	Qualitative
Indicator weight	4
Indicator weight (% of total index)	5%
Data source	Gibney, Mark, Linda Cornett, Reed Wood, Peter Haschke, Daniel Arnon, and Attilio Pisanò. 2025. The Political Terror Scale 2024. Date Retrieved, from the Political Terror Scale website: http://www.politicalterrorscale.org.
Measurement period	2024

Definition: The Political Terror Scale (PTS) measures levels of political violence and terror that a country experiences in a given year based on a 5-level "terror scale" originally developed by Freedom House. The data used in compiling this index comes from two different sources: the yearly country reports of Amnesty International and the US Department of State's Country Reports on Human Rights Practices. The average of the two scores is taken.

Scoring Criteria

1 = Countries under a secure rule of law, people are not imprisoned for their view, and torture is rare or exceptional. Political murders are extremely rare.

2 = There is a limited amount of imprisonment for nonviolent political activity. However, few persons are affected, torture and beatings are exceptional. Political murder is rare.

3 = There is extensive political imprisonment, or a recent history of such imprisonment. Execution or other political murders and brutality may be common. Unlimited detention, with or without a trial, for political views is accepted.

4 = Civil and political rights violations have expanded to large numbers of the population. Murders, disappearances, and torture are a common part of life. In spite of its generality, on this level terror affects those who interest themselves in politics or ideas.

5 = Terror has expanded to the whole population. The leaders of these societies place no limits on the means or thoroughness with which they pursue personal or ideological goals.

Volume of Transfers of Major Conventional Weapons, as Recipient (Imports) per 100,000 people

Indicator type Quantitative	
Indicator weight	2
Indicator weight (% of total index)	2.5%
Data source	SIPRI Arms Transfers
Database	
Measurement period	2021–2025

Definition: Measures the total volume of major conventional weapons imported by a country between 2021 and 2025, divided by the average population in this time period at the 100,000 people level (population data supplied by the EIU). The SIPRI Arms Transfers Database covers all international sales and gifts of major conventional weapons and the technology necessary for their production. The transfer equipment or technology is from one country, rebel force or international organisation to another country, rebel force or international organisation. Major conventional weapons include: aircraft, armoured vehicles, artillery, radar systems, missiles, ships, engines. SIPRI uses a unique pricing system, the Trend Indicator Value (TIV) that measures military capability. The indicator raw value is measured as TIV per 100,000 population.

Scoring Bands

1/5	2/5	3/5	4/5	5/5
0-7.233	7.234-14.468	14.469-21.702	21.703-28.936	>28.937

Impact of Terrorism

Indicator type	Quantitative
Indicator weight	2
Indicator weight (% of total index)	2.5%
Data source	IEP Global Terrorism Index (GTI)
Measurement period	2021–2025

Definition: Terrorist incidents are defined as "intentional acts of violence or threat of violence by a non-state actor." This means an incident has to meet three criteria in order for it to be counted as a terrorist act:

A The incident must be intentional – the result of a conscious calculation on the part of a perpetrator.

B The incident must entail some level of violence or threat of violence, including property violence as well as violence against people.

C The perpetrators of the incidents must be sub-national actors. This database does not include acts of state terrorism.

For all incidents listed, at least two of the following three criteria must be present:

1. The act must be aimed at attaining a political, economic, religious or social goal.
2. There must be evidence of an intention to coerce, intimidate or convey some other message to a larger audience (or audiences) than the immediate victims.
3. The action must be outside the context of legitimate warfare activities.

Methodology: Using the comprehensive, event-based Terrorism Tracker, the GTI combines four variables to develop a composite score: the number of terrorist incidents in a given year, the total number of fatalities in a given year, the total number of injuries caused in a given year and the approximate level of property damage in a given year. The composite score captures the direct effects of terrorist-related violence, in terms of its physical effect, but also attempts to reflect the residual effects of terrorism in terms of emotional wounds and fear by attributing a weighted average to the damage inflicted in previous years.

Scoring Bands

1/5	2/5	3/5	4/5	5/5
0-13.479	13.48-181.699	181.7-2,449.309	2,449.31-33,015.949	>33,015.95

Number of Deaths From Organised Internal Conflict

Indicator type	Quantitative
Indicator weight	5
Indicator weight (% of total index)	6.3%
Data source	UCDP Georeferenced Event Dataset and Candidate Dataset
Measurement period	2025

Definition: This indicator uses the UCDP's definition of conflict. UCDP defines conflict as: "a contested incompatibility that concerns government and/or territory where the use of armed force between two parties, results in at least 25 battle-related deaths in a year."

Scoring Bands

1/5	2/5	3/5	4/5	5/5
0–23 deaths	24–998 deaths	999–4,998 deaths	4,999–9,998 deaths	> 9,999 deaths

Internal Conflicts Fought

Indicator type	Quantitative
Indicator weight	2.56
Indicator weight (% of total index)	3.2%
Data sources	IEP; UCDP Battle-UCDP Georeferenced Events Dataset
Measurement period	2021–2025

Definition: This indicator measures the number and duration of conflicts that occur within a specific country's legal boundaries. Information for this indicator is sourced from three datasets from Uppsala Conflict Data Program (UCDP): the Battle-Related Deaths Dataset, Non-State Conflict Dataset and One-sided Violence Dataset. The score for a country is determined by adding the scores for all individual conflicts which have occurred within that country's legal boundaries over the last five years.

Each individual conflict score is based on the following factors:

Number:

- The number of interstate armed conflicts, internal armed conflict (civil conflicts), internationalised internal armed conflicts, one-sided conflict and non-state conflict located within a country's legal boundaries.
- If a conflict is a war (1,000+ battle-related deaths) it receives a score of one; if it is an armed conflict (25-999 battle-related deaths) it receives a score of 0.25.

Duration:

- A score is assigned based on the number of years out of the last five that conflict has occurred. For example, if a conflict last occurred five years ago that conflict will receive a score of one out of five.

The cumulative conflict scores are then added and banded to establish a country's score. This indicator is two years lagging due to when the UCDP data is released.

Scoring Bands

1/5	2/5	3/5	4/5	5/5
No internal conflict	Combined conflict score of up to 4.75	Combined conflict score of up to 9.5	Combined conflict score of up to 14.25	A combined conflict score of 19 or above. This shows very high levels of internal conflict.

EXTERNAL PEACE INDICATORS

Military Expenditure as a Percentage of GDP

Indicator type	Quantitative
Indicator weight	2
Indicator weight (% of total index)	2.8%
Data source	International Institute for Strategic Studies, Military Balance+
Measurement period	2025

Alternative Source: When no data was provided, several alternative sources were used: National Public Expenditure Accounts, SIPRI information and the Military Balance.

Definition: Cash outlays of central or federal government to meet the costs of national armed forces—including strategic, land, naval, air, command, administration and support forces as well as paramilitary forces, customs forces and border guards if these are trained and equipped as a military force. Published EIU data on nominal GDP (or the World Bank when unavailable) was used to arrive at the value of military expenditure as a percentage of GDP.

Scoring Criteria: This indicator is scored using a min-max normalisation. Applying this method, a country's score is based on the distance of its military expenditure as a share of GDP from the benchmarks of 0% (for a score of 1) and 8.37% or above (for a score of 5). The bands, while linear, approximately conform as follows:

1/5	2/5	3/5	4/5	5/5
0-2.092	2.093-4.184	4.185-6.277	6.278-8.37	>8.371

Number of Armed Services Personnel per 100,000 people

Indicator type	Quantitative
Indicator weight	2
Indicator weight (% of total index)	2.8%
Data source	International Institute for Strategic Studies, Military Balance+
Measurement period	2025

Alternative Source: World Bank population data used if unavailable from the EIU.

Definition: Active armed services personnel comprise all service men and women on full-time duty in the army, navy, air force and joint forces (including conscripts and long-term assignments from the reserves). Population data provided by the EIU.

Scoring Bands

1/5	2/5	3/5	4/5	5/5
0-657.744	657.745-1,315.489	1,315.49-1,973.234	1,973.235-2,630.98	>2,630.981

Additional Notes: The Israeli reservist force is used to calculate Israel's number of armed services personnel.

Financial Contribution to UN Peacekeeping Missions

Indicator type	Quantitative
Indicator weight	2
Indicator weight (% of total index)	2.8%
Data source	IEP; United Nations Committee on Contributions
Measurement period	2022–2024

Methodology: The UNFU indicator measures whether UN member countries meet their UN peacekeeping funding commitments. Although countries may fund other programs in development or peacebuilding, the records on peacekeeping are easy to obtain and understand and provide an instructive measure of a country's commitment to peace. The indicator calculates the percentage of countries' "outstanding payments versus their annual assessment to the budget of the current peacekeeping missions" over an average of three years. This ratio is derived from data provided by the United Nations Committee on Contributions Status reports. The indicator is compiled as follows:

1. The status of contributions by UN member states is obtained.
2. For the relevant peacekeeping missions, the assessments (for that year only) and the collections (for that year only) are recorded. From this, the outstanding amount is calculated for that year.
3. The ratio of outstanding payments to assessments is calculated. By doing so a score between 0 and 1 is obtained. Zero indicates no money is owed; a country has met their funding commitments. A score of 1 indicates that a country has not paid any of their assessed contributions. Given that the scores already fall between 0 and 1, they are easily banded into a score between 1 and 5. The final banded score is a weighted sum of the current year and the previous two years. The weightings are 0.5 for the current year, 0.3 for the

previous year and 0.2 for two years prior. Hence it is a three-year weighted average.
4. Outstanding payments from previous years and credits are not included. The scoring is linear to one decimal place.

Scoring Criteria

1/5	0–25% of stated contributions owed
2/5	26–50% of stated contributions owed
3/5	51–75% of stated contributions owed
4/5	75–99% of stated contributions owed
5/5	100% of stated contributions owed (no contributions made in past three years)

Additional Notes: All United Nations member states share the costs of United Nations peacekeeping operations. The General Assembly apportions these expenses based on a special scale of assessments applicable to peacekeeping. This scale takes into account the relative economic wealth of member states, with the permanent members of the Security Council required to pay a larger share because of their special responsibility for the maintenance of international peace and security.

Nuclear and Heavy Weapons Capabilities

Indicator type	Quantitative
Indicator weight	3
Indicator weight (% of total index)	4.2%
Data source	IISS Military Balance+
Measurement period	2025

Methodology: This indicator is based on a categorised system for rating the destructive capability of a country's stock of heavy weapons. Holdings are those of government forces and do not include holdings of armed opposition groups.

The scoring system incorporates armoured vehicles, artillery, tanks, combat aircraft and combat helicopters, warships, aircraft carriers and nuclear submarines. It takes into account military sophistication, weapons technology, and combat readiness.

Countries with nuclear capabilities automatically receive the maximum score of five. Other scores are expressed to the second decimal point, adopting a min-max normalisation that sets the max at two standard deviations above the average raw score.

1/5	Nil–18,185
2/5	18,185–36,368
3/5	36,368–54,553
4/5	54,553–72,737
5/5	States with nuclear capability receive a 5, or states with heavy weapons capability of 72,738 or in the top 2% of heavy weapons receive a 5.

Volume of Transfers of Major Conventional Weapons as Supplier (Exports) per 100,000 people

Indicator type	Quantitative
Indicator weight	3
Indicator weight (% of total index)	4.2%
Data source	SIPRI Arms Transfers Database
Measurement period	2021–2025

Definition: Measures the total volume of major conventional weapons exported by a country between 2021 and 2025 divided by the average population during this time period (population data supplied by the EIU). The SIPRI Arms Transfers Database covers all international sales and gifts of major conventional weapons and the technology necessary for the production of them. The transfer equipment or technology is from one country, rebel force or international organisation to another country, rebel force or international organisation. Major conventional weapons include: aircraft, armoured vehicles, artillery, radar systems, missiles, ships and engines. SIPRI uses a unique pricing system, the Trend Indicator Value (TIV) that measures military capability. The indicator raw value is measured as TIV per 100,000 population.

Scoring Bands

1/5	2/5	3/5	4/5	5/5
0-3.681	3.682-7.364	7.365-11.046	11.047-14.729	>14.73

Number of Refugees and Internally Displaced People as a Percentage of the Population

Indicator type	Quantitative
Indicator weight	4
Indicator weight (% of total index)	5.7%
Data source	UNHCR Mid-Year Trends 2025; International Displacement Monitoring Centre (IDMC)
Measurement period	2025

Definition: Refugee population by country or territory of origin plus the number of a country's internally displaced people (IDPs), as a percentage of the country's total population.

Scoring Bands

1/5	2/5	3/5	4/5	5/5
0-3.034	3.035-6.069	6.07-9.104	9.105-12.139	>12.14

Relations with Neighbouring Countries

Indicator type Qualitative	
Indicator weight	5
Indicator weight (% of total index)	7.1%
Data source	EIU
Measurement period	March 2025 to March 2026

Definition: Assessment of the intensity of contentiousness of neighbours, ranked from 1-5 (peaceful to very aggressive) by the EIU's Country Analysis team. Country analysts are asked to assess this indicator on an annual basis, for the period March to March.

Scoring Criteria

1 = **Peaceful:** None of the neighbours has attacked the country since 1950.
2 = **Low:** The relationship with neighbours is generally good, but aggressiveness is manifest in politicians' speeches or in protectionist measures.
3 = **Moderate:** There are serious tensions and consequent economic and diplomatic restrictions from other countries.
4 = **Aggressive:** Open conflicts with violence and protests.
5 = **Very aggressive:** Frequent invasions by neighbouring countries.

External Conflicts Fought

Indicator type	Quantitative
Indicator weight	2.28
Indicator weight (% of total index)	3.2%
Data source	IEP; UCDP Battle-Related Deaths Dataset
Measurement period	2020–2024

Definition: This indicator measures the number and duration of extraterritorial conflicts a country is involved in. Information for this indicator is sourced from the UCDP Battle-Related Deaths Dataset. The score for a country is determined by adding all individual conflict scores where that country is involved as an actor in a conflict outside its legal boundaries. Conflicts are not counted against a country if they have already been counted against that country in the number and duration of internal conflicts indicator.

Each individual conflict score is based on the following factors:

Number:
- Number of internationalised internal armed conflicts and interstate armed conflicts.
- If a conflict is a war (1,000+ battle-related deaths) it receives a score of one; if it is an armed conflict (25-999 battle-related deaths) it receives a score of 0.25.

Duration:
- A score is assigned based on the number of years out of the last five that conflict has occurred. For example, if a conflict last occurred five years ago that conflict will receive a score of one out of five.

Role:
- If the country is a primary party to the conflict, that conflict receives a score of one; if it is a secondary party (supporting the primary party), that conflict receives a score of 0.25.
- If a country is a party to a force covered by a relevant United Nations Security Council Resolution, then the entire conflict score is multiplied by a quarter; if not, it receives a full score.

The different conflict scores are then added and banded to establish a country's score.

Scoring Bands

1/5	2/5	3/5	4/5	5/5
No external conflict	Combined conflict score of up to 1.5	Combined conflict score of up to 3	Combined conflict score of up to 4.5	A combined conflict score of 6 or above. This shows very high levels of external conflict.

Number of Deaths from Organised External Conflict

Indicator type	Quantitative
Indicator weight	5
Indicator weight (% of total index)	7.1%
Data source	UCDP Georeferenced Event Dataset and Candidate Dataset
Measurement period	2025

Alternate Source: Where applicable, IEP also uses several other open-source datasets to construct this indicator.

Definition: This indicator uses the UCDP's definition of conflict as "a contested incompatibility that concerns government and/or territory where the use of armed force between two parties, results in at least 25 battle-related deaths in a year".

Scoring Bands

1/5	2/5	3/5	4/5	5/5
0–24 deaths	25–998 deaths	999–4,998 deaths	4,999–9,998 deaths	> 9,999 deaths

APPENDIX C

GPI Domain Scores

TABLE C.1

Ongoing Domestic and International Conflict domain, most peaceful to least

COUNTRY	SCORE
Iceland	1.101
Mauritius	1.101
Uruguay	1.101
New Zealand	1.119
Singapore	1.119
Switzerland	1.144
Botswana	1.174
Chile	1.201
Ireland	1.22
Malaysia	1.225
Austria	1.245
Italy	1.245
Portugal	1.254
Belgium	1.267
Germany	1.267
Netherlands	1.286
Mongolia	1.302
Namibia	1.302
Slovenia	1.302
Denmark	1.346
Spain	1.36
Czechia	1.364
Bulgaria	1.403
Croatia	1.403
Hungary	1.403
Uzbekistan	1.411
Greece	1.412
United Kingdom	1.414
Bhutan	1.419
Kazakhstan	1.421
Paraguay	1.421
Turkmenistan	1.421
Poland	1.424
Australia	1.465
Canada	1.465
Jamaica	1.475
Liberia	1.478
Albania	1.503
Japan	1.503
Laos	1.503
North Macedonia	1.503
Montenegro	1.503
Panama	1.503
Timor-Leste	1.503
Sierra Leone	1.522
Latvia	1.538
Estonia	1.547
Finland	1.547
Lithuania	1.547
The Gambia	1.556
Eswatini	1.557
Norway	1.565
Argentina	1.569
Lesotho	1.577
Honduras	1.597
Guinea-Bissau	1.604
Slovakia	1.604
Trinidad and Tobago	1.611
Republic of the Congo	1.619
Bosnia and Herzegovina	1.622
Vietnam	1.622
Bolivia	1.633
Madagascar	1.65
Tunisia	1.657
Gabon	1.659
Mauritania	1.662
Qatar	1.674
Sri Lanka	1.675
Costa Rica	1.696
France	1.696
Cyprus	1.705
Equatorial Guinea	1.705
Guyana	1.705
Nicaragua	1.705
Georgia	1.71
Tajikistan	1.711
Kyrgyz Republic	1.715
Zimbabwe	1.723
Malawi	1.732
Armenia	1.739
United Arab Emirates	1.754
Senegal	1.758
Zambia	1.758
Guatemala	1.772
Cote d' Ivoire	1.796
Sweden	1.803
Kosovo	1.805
Kuwait	1.805
Oman	1.805
Taiwan	1.805
Serbia	1.815
Angola	1.817
Eritrea	1.818
Moldova	1.824
Papua New Guinea	1.854
Romania	1.858
Jordan	1.864
Ghana	1.868
Djibouti	1.872
Peru	1.883
Morocco	1.895
Belarus	1.906
Cuba	1.906
South Korea	1.906
Algeria	1.914
Dominican Republic	1.916
Saudi Arabia	1.95
Azerbaijan	1.954
El Salvador	1.955
Guinea	1.967
South Africa	2.012
Egypt	2.045
China	2.056
Nepal	2.069
Philippines	2.069
Bahrain	2.099
Uganda	2.131
Cambodia	2.146
Thailand	2.178
Benin	2.185
Indonesia	2.192
Togo	2.193
Brazil	2.227
Bangladesh	2.237
United States of America	2.24
Tanzania	2.242
Libya	2.246
Venezuela	2.357
Kenya	2.358
Rwanda	2.365
Mozambique	2.507
Iraq	2.523
Central African Republic	2.524
Ecuador	2.538
Lebanon	2.595
Burundi	2.607
India	2.622
Colombia	2.647
North Korea	2.656
Haiti	2.683
Türkiye	2.745
Chad	2.785
Afghanistan	2.82
South Sudan	2.886
Cameroon	2.898
Myanmar	2.943
Mexico	3.064
Somalia	3.155
Iran	3.208
Yemen	3.281
Ethiopia	3.316
Nigeria	3.335
Burkina Faso	3.359
Pakistan	3.386
Israel	3.391
Mali	3.457
Niger	3.521
Palestine	3.562
Syria	3.67
Democratic Republic of the Congo	3.675
Sudan	3.717
Ukraine	3.864
Russia	4.037

TABLE C.2

Societal Safety and Security domain, most to least peaceful

COUNTRY	SCORE
Norway	1.243
Finland	1.287
Iceland	1.288
Japan	1.296
Denmark	1.321
Singapore	1.341
Qatar	1.369
Switzerland	1.433
Slovenia	1.452
Estonia	1.454
Sweden	1.463
Netherlands	1.473
Lithuania	1.494
New Zealand	1.497
Ireland	1.525
Canada	1.554
South Korea	1.554
Latvia	1.558
United Kingdom	1.56
Poland	1.606
Austria	1.622
Czechia	1.641
Australia	1.663
Italy	1.664
Portugal	1.669
Taiwan	1.672
Kuwait	1.693
Belgium	1.695
Romania	1.699
Croatia	1.7
Hungary	1.717
Bulgaria	1.735
Germany	1.739
Slovakia	1.749
Spain	1.765
Armenia	1.776
Oman	1.778
Bhutan	1.788
Albania	1.812
Montenegro	1.817
Equatorial Guinea	1.875
Timor-Leste	1.885
Greece	1.891
Saudi Arabia	1.893
Vietnam	1.908
North Macedonia	1.909
Malaysia	1.917
United Arab Emirates	1.919
Kosovo	1.949
Tajikistan	1.976
France	1.984
Morocco	1.995
Uzbekistan	1.995
Serbia	2.017
Indonesia	2.021
Jordan	2.022
Ghana	2.046
Kyrgyz Republic	2.047
Kazakhstan	2.087
Mauritius	2.096
Costa Rica	2.115
Tanzania	2.121
Bosnia and Herzegovina	2.124
Sri Lanka	2.125
Cambodia	2.13
Moldova	2.139
Mongolia	2.148
Laos	2.153
Algeria	2.157
Turkmenistan	2.172
Madagascar	2.184
Bahrain	2.188
Cyprus	2.207
Paraguay	2.231
Chile	2.246
The Gambia	2.248
Malawi	2.257
Djibouti	2.262
Angola	2.263
Papua New Guinea	2.28
India	2.284
Guinea-Bissau	2.294
Azerbaijan	2.296
Lesotho	2.329
Thailand	2.339
Senegal	2.353
Botswana	2.365
Bolivia	2.366
Namibia	2.373
Philippines	2.377
Jamaica	2.384
Tunisia	2.386
Cote d' Ivoire	2.387
Trinidad and Tobago	2.397
Uruguay	2.411
Dominican Republic	2.414
Belarus	2.422
Guatemala	2.434
Nepal	2.444
United States of America	2.454
China	2.462
Rwanda	2.463
Sierra Leone	2.465
Georgia	2.478
Zimbabwe	2.489
Argentina	2.49
Zambia	2.493
Egypt	2.496
Togo	2.508
Israel	2.511
Guinea	2.523
Panama	2.549
Peru	2.558
Lebanon	2.57
Bangladesh	2.579
Mauritania	2.582
El Salvador	2.59
Gabon	2.616
Nicaragua	2.623
Honduras	2.637
Cuba	2.644
Liberia	2.652
Libya	2.655
Burundi	2.686
Guyana	2.696
Benin	2.734
Ukraine	2.744
Ethiopia	2.749
Palestine	2.753
Mozambique	2.775
Pakistan	2.798
Türkiye	2.812
Eswatini	2.815
Brazil	2.817
North Korea	2.856
Niger	2.862
Russia	2.876
Cameroon	2.913
Ecuador	2.914
Mexico	2.915
South Africa	2.917
Republic of the Congo	2.919
Venezuela	2.92
Kenya	2.927
Iran	2.944
Nigeria	2.951
Uganda	2.999
Burkina Faso	3.001
Iraq	3.078
Eritrea	3.185
Myanmar	3.224
Syria	3.232
Chad	3.251
Mali	3.268
Colombia	3.317
Sudan	3.339
Haiti	3.354
Yemen	3.433
Somalia	3.503
Afghanistan	3.556
Central African Republic	3.559
Democratic Republic of the Congo	3.571
South Sudan	3.865

TABLE C.3

Militarisation domain, most peaceful to least

COUNTRY	SCORE
Iceland	1.027
Malaysia	1.204
Portugal	1.231
Bhutan	1.281
Moldova	1.293
Slovenia	1.308
Austria	1.336
Ireland	1.339
Mauritius	1.369
Indonesia	1.398
New Zealand	1.409
Mongolia	1.423
Hungary	1.426
Zambia	1.442
Argentina	1.468
Rwanda	1.476
Senegal	1.487
Bosnia and Herzegovina	1.492
Czechia	1.498
The Gambia	1.508
Equatorial Guinea	1.527
Uruguay	1.529
Cuba	1.545
Thailand	1.562
Switzerland	1.564
Canada	1.569
Madagascar	1.571
Dominican Republic	1.577
Guyana	1.581
Slovakia	1.585
Sierra Leone	1.591
Tunisia	1.593
Eswatini	1.598
Timor-Leste	1.604
Vietnam	1.61
Bangladesh	1.615
Mozambique	1.635
Angola	1.647
Panama	1.648
Tajikistan	1.651
Ethiopia	1.658
Burundi	1.662
South Africa	1.679
Guatemala	1.688
Montenegro	1.69
Morocco	1.695
Kosovo	1.696
Australia	1.704
Costa Rica	1.706
Liberia	1.706
Latvia	1.713
Philippines	1.716
Finland	1.717
Peru	1.718
Eritrea	1.73
Uzbekistan	1.737
Benin	1.738
Mexico	1.738
Kyrgyz Republic	1.741
Gabon	1.743
Nigeria	1.747
Brazil	1.748
Nepal	1.748
Kazakhstan	1.75
Trinidad and Tobago	1.762
Zimbabwe	1.763
Kenya	1.768
Honduras	1.77
Nicaragua	1.779
Jordan	1.783
Botswana	1.79
Papua New Guinea	1.791
Cyprus	1.792
Jamaica	1.792
Japan	1.794
Bulgaria	1.795
Georgia	1.799
Haiti	1.8
Taiwan	1.808
Somalia	1.81
Cameroon	1.811
Laos	1.812
Uganda	1.816
Croatia	1.82
Iran	1.82
Tanzania	1.821
Colombia	1.825
Namibia	1.826
Egypt	1.856
Romania	1.874
Spain	1.884
Sri Lanka	1.891
Cote d' Ivoire	1.896
Niger	1.902
Ghana	1.912
Togo	1.918
Cambodia	1.919
Serbia	1.924
Malawi	1.93
Albania	1.933
Poland	1.935
Chad	1.938
Democratic Republic of the Congo	1.955
Lithuania	1.956
Ecuador	1.957
Mali	1.962
Paraguay	1.978
Syria	1.983
Chile	1.991
Belgium	1.992
Republic of the Congo	2.003
Lebanon	2.008
Türkiye	2.021
China	2.038
North Macedonia	2.045
Armenia	2.057
Oman	2.06
Estonia	2.068
Kuwait	2.068
Denmark	2.08
Burkina Faso	2.082
Guinea	2.082
Germany	2.083
Libya	2.093
Venezuela	2.093
Singapore	2.095
Bahrain	2.096
Azerbaijan	2.1
South Sudan	2.102
Algeria	2.103
Lesotho	2.115
Sweden	2.12
Bolivia	2.144
Turkmenistan	2.145
Djibouti	2.156
Guinea-Bissau	2.156
Netherlands	2.169
El Salvador	2.174
Iraq	2.179
Yemen	2.186
United Arab Emirates	2.188
South Korea	2.233
Mauritania	2.239
Qatar	2.247
Palestine	2.265
Sudan	2.271
Central African Republic	2.291
Belarus	2.306
Greece	2.36
Myanmar	2.367
India	2.419
Italy	2.494
United Kingdom	2.507
Pakistan	2.574
Saudi Arabia	2.588
Norway	2.689
Afghanistan	2.701
France	2.806
Ukraine	3.088
United States of America	3.09
North Korea	3.105
Russia	3.285
Israel	3.919

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Section 2

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