

Munich Security Index 2025

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Respondents from the G7 and “BICS” countries (BRICS countries without Russia) share acute concerns about non-traditional risks but are increasingly polarized vis-à-vis geopolitical threats. While people from both the G7 and BICS countries worry about cyberattacks, economic crises, and environmental threats, views on the major powers diverge significantly. Compared to the first iteration of the Munich Security Index (MSI) in 2021, the risks posed by Russia and Iran have risen the most among all the indicators in the index among G7 countries, while the risk posed by China has remained relatively steady (Figure 1.8). In contrast, respondents in BICS countries consider China much less threatening today than they did four years ago, dropping 16 positions in the index since 2021, and continue to view Russia and Iran among the smallest risks in the index (Figure 1.9).

Since 2021, the MSC and Kekst CNC have collected data to answer core questions that help understand global risk perceptions: Do people think that the world is becoming a riskier place? Is there a global consensus on some of the grave risks that humanity is facing today? And how prepared do societies feel to tackle these threats? By combining five metrics, the index provides an in-depth view of how 11 countries view 33 major risks over time. This edition of the MSI is based on representative samples of 1,000 people from each G7 and BICS nation. The total sample thus amounts to 11,000 people. Polling was conducted between November 14 and November 29, 2024, using industry-leading online panels. The local surveys were carried out by trusted and reputable fieldwork partners in compliance with the European Society for Opinion and Market Research code. Respondents were selected according to stratified quotas for gender, age, residency, formal education, and income to ensure representativeness. The final data was then weighted to exactly match the quotas. The margin of error was 3.1 percent. Polling in autocracies always comes with difficulties, as respondents may not feel like they can freely express their views. The results from China in particular should therefore be interpreted with caution.

Following last year’s drop in global risk perceptions, the MSI registers aggregate increases in 20 risk indicators, while ten indicators saw overall decreases, and two remained steady (Figure 1.7). Following the election of US President Donald Trump, the perceived risk posed by the US increased sharply among the G7 countries – especially in Germany and Canada – as well as India, remained (roughly) the same in China and Brazil, and decreased in South Africa. While last year’s MSI showed somewhat improved

perceptions of Russia, risk perceptions of Moscow in Canada, France, Germany, India, and the UK have increased. Heightened risk perceptions of the US and Russia are perhaps also connected to increased fears of trade wars and the use of nuclear weapons by an aggressor, respectively. Strikingly, only Germany and the UK see China as more of a risk than last year. Compared to last year, fears of the coronavirus pandemic, energy supply disruptions, and radical Islamic terrorism decreased significantly in most countries.

Non-traditional risks nonetheless remain top concerns for respondents around the world. The three environmental risks included in the index – extreme weather and forest fires, the destruction of natural habitats, and climate change generally – rank as the aggregate first, second, and third greatest risks (Figure 1.6). In India, Brazil, and Italy, the top three risks are all environmental in nature. Cyberattacks are considered the fourth greatest risk in aggregate, ranking among the top three in the US, the UK, and Canada. Russia is the greatest concern in the UK, Canada (tied), and Germany (tied), and the second greatest in the US. China stands out as none of its top risks – among them the US, the use of biological weapons by an aggressor, and the use of nuclear weapons by an aggressor – feature among the top risks in any other country.

The wider geopolitical competition continues to shape respondents' views of other countries, but the conflict in the Middle East and the US elections also appear to have had an impact. All G7 countries see Iran, China, and Russia more as threats than allies, though none of them are seen as more of a threat than an ally in any of the BICS countries, with the exception of China in India and Iran in Brazil (Figure 1.10). Chinese respondents remain the only ones who see the US as more of a threat than an ally. Compared to last year, the standings of Israel, the US, and Russia fell significantly (Figure 1.11). At the other end of the spectrum, South Korea, Poland, Turkey, and the UK saw the biggest improvements.

Finally, respondents in the G7 and BICS countries strikingly diverge in how they perceive the trajectory of their country's fortune (Figure 1.12). No G7 country except the US believes that they will be more secure and wealthy in ten years' time, evincing a widespread sense of decline. In contrast, majorities in China and India believe that they will be in a better economic and security position in ten years, with respondents in Brazil and South Africa roughly evenly split.

Explaining the Index

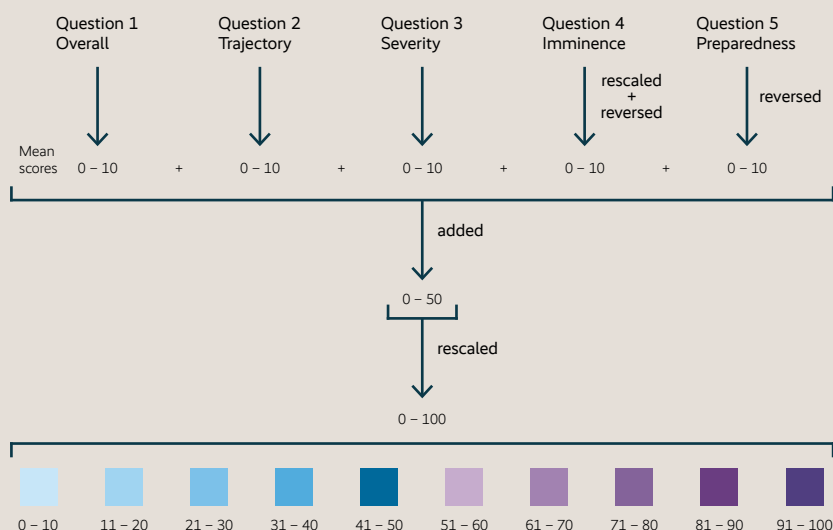
Index components

The Munich Security Index combines the crucial components that make a risk more serious. Public perceptions of trajectory are combined with imminence and severity alongside a measure to give equal weight to perceptions of preparedness.



Index scores

To produce the final risk index score for each risk in each country we add the mean scores for all five of the inputs above – overall risk, trajectory, severity, imminence, and preparedness. The resulting total is then rescaled to run from 0 to 100 for ease of interpretation. The final risk index score is an absolute figure (with 100 the highest and 0 the lowest possible risk index score) that can be compared between demographics, countries, and over time.



Besides a risk heatmap (page 36) that features the G7 countries, Brazil, China, India, and South Africa and how they score on each of the 33 risks covered, the index also includes an overview of how risk perceptions have changed over time (pages 38–39) as well as an overview of how countries perceive other states (page 51).

The index also provides more detailed insights into the individual risk profiles of the countries surveyed (pages 40–50).

Country profiles

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Extreme weather and forest fires	71	+10	63	28
Climate change generally	69	+9	58	28
Destruction of natural habitats	69	+7	60	29

Change in index score

Change in the risk index score since the last Munich Security Index was published. The last edition of the index was based on surveys conducted in October and November 2023.

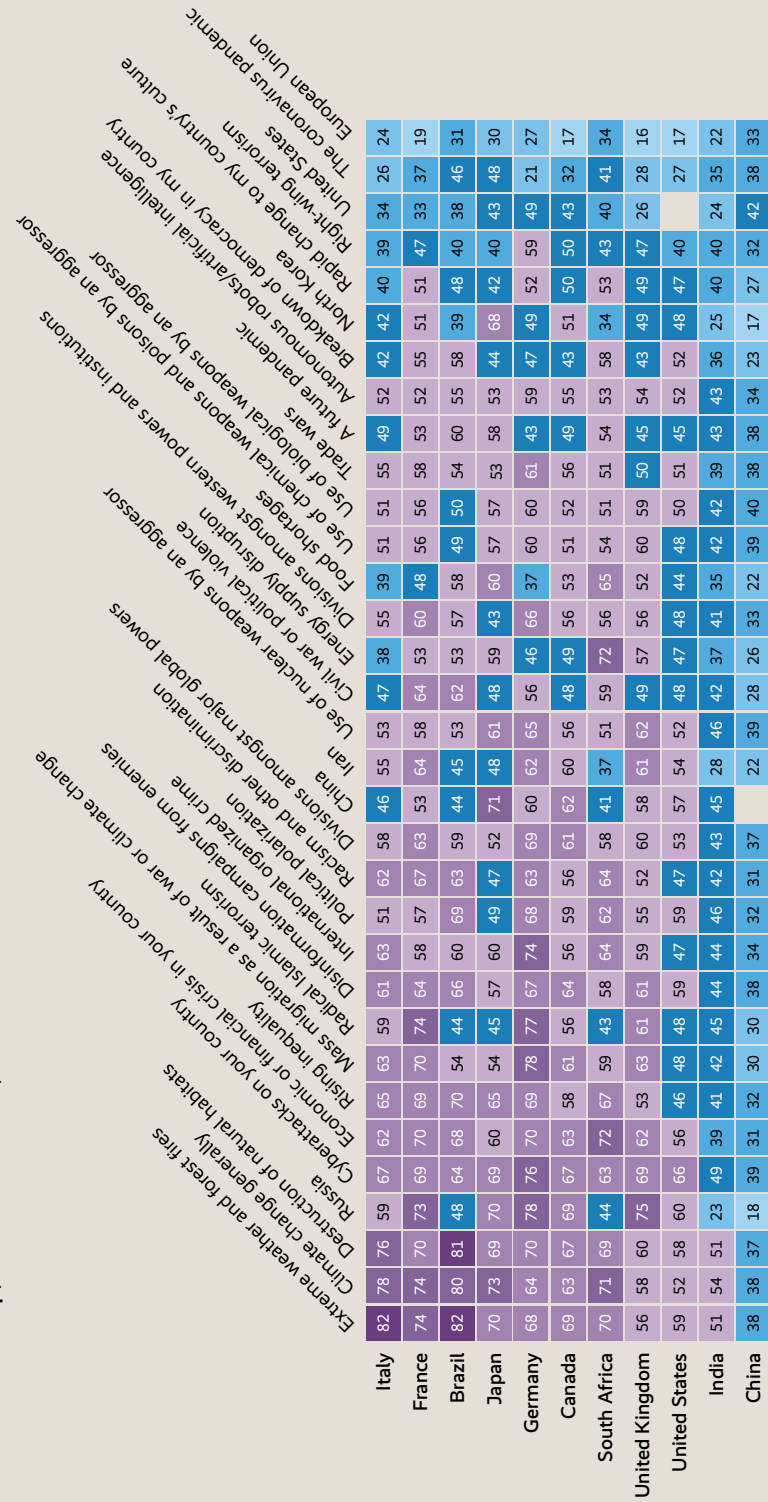
Share thinking risk is imminent

Percentage of respondents who answered “now or in the next few months,” “in the next year,” and “in the next 5 years” in answer to the question “For each of the following, please say how imminent a threat you think it is.”

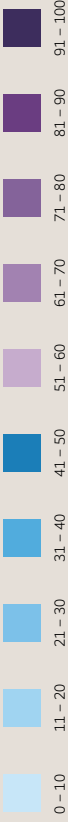
Share feeling unprepared

Percentage of respondents who rated their country’s preparedness as less than 4 on a 0 – 10 scale in answer to the question “For each of the following, please say how prepared your country is to deal with this threat.”

Figure 1.6
The risk heatmap, November 2024, score



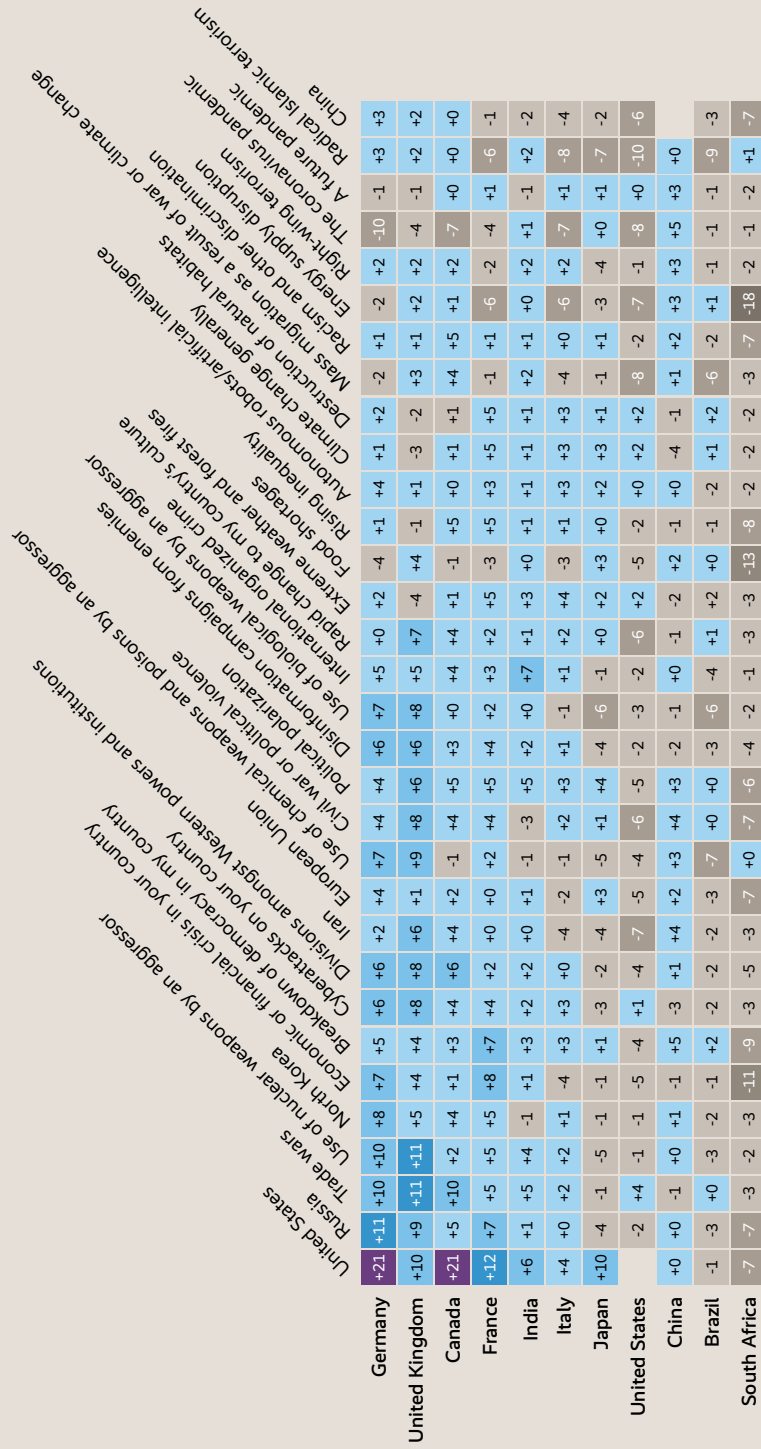
In the United States and China, respondents were not asked to assess the risk from their own country.



Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

Figure 1.7

The change heatmap, November 2024, change in index score since October–November 2023

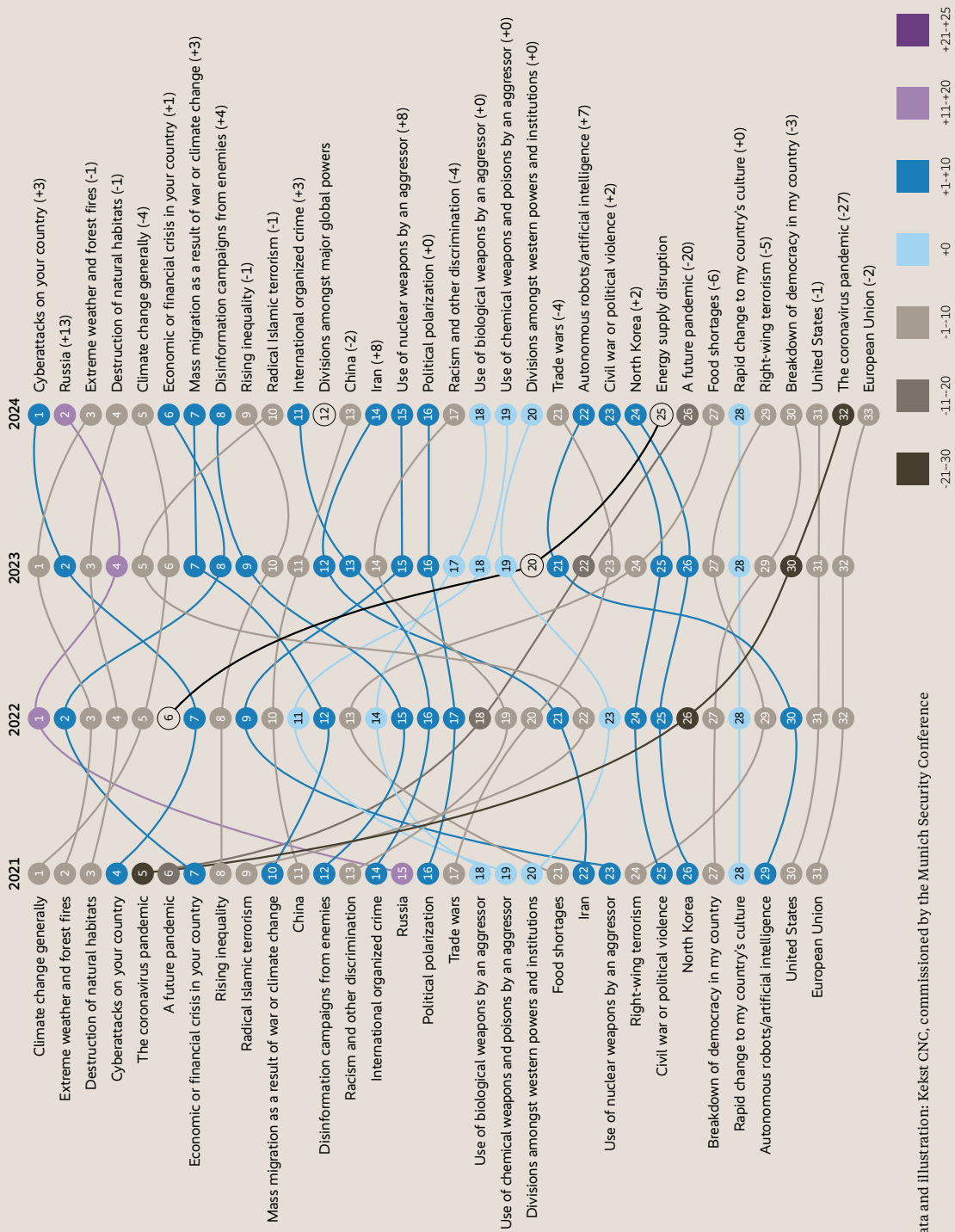


In the United States and China, respondents were not asked to assess the risk from their own country.



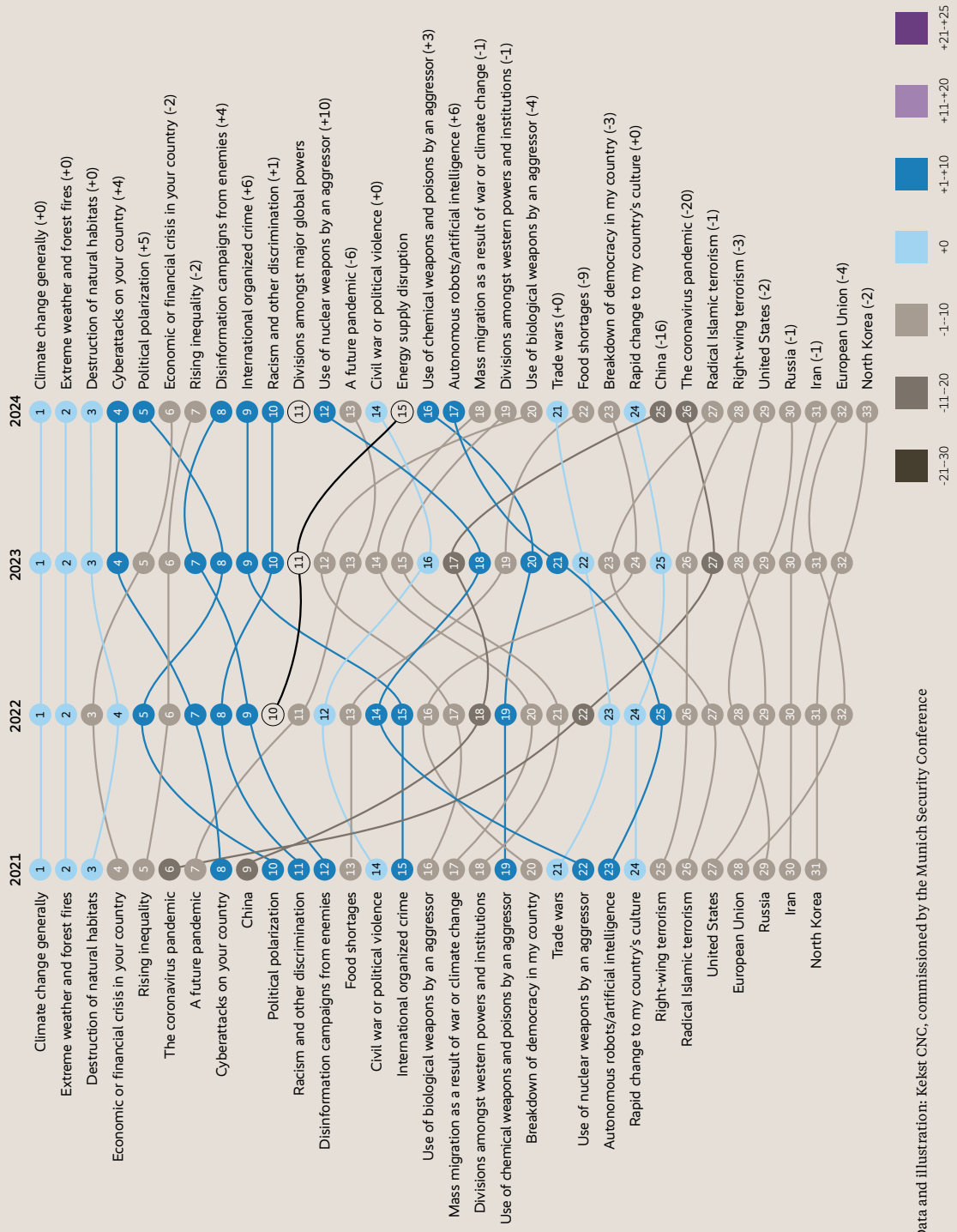
Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

Figure 1.8 The G7 risk bump chart, aggregate ranking of risks by the G7 countries, 2021–2024



Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

Figure 1.9 The “BICS” risk bump chart, aggregate ranking of risks by Brazil, China, India, and South Africa, 2021–2024



Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

Canada

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Extreme weather and forest fires	69	+1	68	25
Russia	69	+5	58	40
Cyberattacks on your country	67	+4	67	27
Destruction of natural habitats	67	+1	63	27
Disinformation campaigns from enemies	64	+3	67	27
Climate change generally	63	+1	59	26
Economic or financial crisis in your country	63	+1	62	29
China	62	+0	51	38
Mass migration as a result of war or climate change	61	+4	57	31
Divisions amongst major global powers	61	+0	56	28
Iran	60	+4	52	36
Political polarization	59	+5	63	24
Rising inequality	58	+5	62	27
Use of nuclear weapons by an aggressor	56	+2	42	45
Radical Islamic terrorism	56	+0	53	32
International organized crime	56	+4	55	28
Divisions amongst Western powers and institutions	56	+6	55	27
Racism and other discrimination	56	+5	66	22
Trade wars	56	+10	60	26
Autonomous robots/artificial intelligence	55	+0	55	30
Food shortages	53	-1	51	31
Use of biological weapons by an aggressor	52	+0	38	44
Use of chemical weapons and poisons by an aggressor	51	-1	38	43
North Korea	51	+4	42	34
Right-wing terrorism	50	+2	48	29
Rapid change to my country's culture	50	+4	48	29
A future pandemic	49	+0	44	20
Energy supply disruption	49	+1	48	27
Civil war or political violence	48	+4	48	31
Breakdown of democracy in my country	43	+3	38	32
United States	43	+21	45	32
The Coronavirus pandemic	32	-7	49	16
European Union	17	+2	24	24

1

Environmental and geopolitical threats are leading concerns in Canada. Extreme weather and forest fires (69 points) and Russia (69) are tied for the highest risk index scores. The Russian threat has increased significantly (by 5 points) since the last MSI, while cyberattacks (67) and the destruction of natural habitats (67) follow closely behind.

2

The threat of a trade war is up eight places even if it is still in 19th place as a perceived risk. The risk posed by the US is up 21 index points, the largest increase across all countries surveyed, tied with Germany.

3

While Russia ranks as a top concern for Canadians, 40 percent feel unprepared for it. Similarly, nuclear and biological weapons show high “unpreparedness” concerns (45 percent and 44 percent respectively) despite low risk index scores of 52 and 56 points, respectively.

67%

is the share of respondents who feel that cyberattacks are imminent

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

France

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Radical Islamic terrorism	74	-6	69	22
Climate change generally	74	+5	66	26
Extreme weather and forest fires	74	+5	65	26
Russia	73	+7	63	35
Destruction of natural habitats	70	+5	64	26
Mass migration as a result of war or climate change	70	-1	60	33
Economic or financial crisis in your country	70	+8	64	30
Cyberattacks on your country	69	+4	69	21
Rising inequality	69	+5	67	29
Racism and other discrimination	67	+1	68	22
Disinformation campaigns from enemies	64	+4	57	21
Civil war or political violence	64	+4	57	31
Iran	64	+0	56	33
Divisions amongst major global powers	63	+0	56	24
Divisions amongst Western powers and institutions	60	+2	56	25
Use of nuclear weapons by an aggressor	58	+5	45	27
International organized crime	58	+3	56	22
Trade wars	58	+5	59	23
Political polarization	57	+5	61	21
Use of biological weapons by an aggressor	56	+2	40	30
Use of chemical weapons and poisons by an aggressor	56	+2	41	30
Breakdown of democracy in my country	55	+7	45	35
A future pandemic	53	+1	51	21
Energy supply disruption	53	-6	49	26
China	53	-1	47	33
Autonomous robots/artificial intelligence	52	+3	57	24
Rapid change to my country's culture	51	+2	40	31
North Korea	51	+5	41	29
Food shortages	48	-3	44	27
Right-wing terrorism	47	-2	54	21
The coronavirus pandemic	37	-4	57	14
United States	33	+12	39	29
European Union	19	+0	30	23

1 The top threats are closely clustered: radical Islamic terrorism, climate change, and extreme weather and forest fires all share the highest risk index score (74), while Russia follows closely at 73. This suggests that French respondents perceive multiple serious threats of equal magnitude, rather than having one dominant concern.

2 There has been a significant increase in concern about the US (a rise of 12 index points) and Russia (a rise of seven points).

3 Energy concerns are declining significantly. Energy supply disruption has seen one of the largest decreases (by six points) in risk perception, dropping to a risk index score of 53.

69% is the share of respondents who feel that the risk of radical Islamic terrorism in France is imminent

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

Germany

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Mass migration as a result of war or climate change	78	-2	70	48
Russia	78	+11	65	49
Radical Islamic terrorism	77	+3	76	39
Cyberattacks on your country	76	+6	76	40
International organized crime	74	+5	77	36
Destruction of natural habitats	70	+2	65	37
Economic or financial crisis in your country	70	+7	66	40
Rising inequality	69	+1	68	40
Divisions amongst major global powers	69	+0	62	42
Extreme weather and forest fires	68	+4	67	36
Political polarization	68	+4	73	30
Disinformation campaigns from enemies	67	+6	72	37
Divisions amongst Western powers and institutions	66	+6	62	40
Use of nuclear weapons by an aggressor	65	+10	49	60
Climate change generally	64	+1	60	35
Racism and other discrimination	63	+1	70	32
Iran	62	+2	58	47
Trade wars	61	+10	61	39
Use of biological weapons by an aggressor	60	+7	45	59
Use of chemical weapons and poisons by an aggressor	60	+7	46	58
China	60	+3	54	49
Right-wing terrorism	59	+2	68	27
Autonomous robots/artificial intelligence	59	+4	63	37
Civil war or political violence	56	+4	50	43
Rapid change to my country's culture	52	+0	50	39
United States	49	+21	52	40
North Korea	49	+8	44	46
Breakdown of democracy in my country	47	+5	39	44
Energy supply disruption	46	-2	45	37
A future pandemic	43	-1	50	29
Food shortages	37	-4	37	36
European Union	27	+4	37	32
The coronavirus pandemic	21	-10	50	21

1

For the second year in a row, mass migration as a result of war or climate change is at the top of the list of perceived threats for German respondents, although it is tied with the threat from Russia this year.

2

Germany shows significantly increased concern about Russia since last year, up five places to become the second overall risk among the public. The risk posed by Russia is up by 11 points since the last MSI and the highest among all countries surveyed.

3

The threat of an economic or financial crisis has risen substantially in German risk perceptions, with an increase of seven index points since the last MSI, and 40 percent of respondents feeling unprepared for it.

49%

is the share of respondents who feel unprepared for the threat posed by Russia

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

Italy

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Extreme weather and forest fires	82	+4	 70	39
Climate change generally	78	+3	 65	36
Destruction of natural habitats	76	+3	 65	38
Cyberattacks on your country	67	+3	 69	29
Rising inequality	65	+1	 59	32
International organized crime	63	+1	 62	26
Mass migration as a result of war or climate change	63	-4	 58	37
Racism and other discrimination	62	+0	 64	29
Economic or financial crisis in your country	62	-4	 56	34
Disinformation campaigns from enemies	61	+1	 64	29
Radical Islamic terrorism	59	-8	 60	30
Russia	59	+0	 50	44
Divisions amongst major global powers	58	+0	 55	31
Divisions amongst Western powers and institutions	55	+0	 55	30
Trade wars	55	+2	 54	30
Iran	55	-4	 50	41
Use of nuclear weapons by an aggressor	53	+2	 41	49
Autonomous robots/artificial intelligence	52	+3	 55	30
Use of biological weapons by an aggressor	51	-1	 39	49
Use of chemical weapons and poisons by an aggressor	51	-1	 39	49
Political polarization	51	+3	 55	24
A future pandemic	49	+1	 43	27
Civil war or political violence	47	+2	 43	33
China	46	-4	 42	41
Breakdown of democracy in my country	42	+3	 35	33
North Korea	42	+1	 37	38
Rapid change to my country's culture	40	+2	 35	33
Right-wing terrorism	39	+2	 46	28
Food shortages	39	-3	 34	36
Energy supply disruption	38	-6	 32	35
United States	34	+4	 38	36
The coronavirus pandemic	26	-7	 42	20
European Union	24	-2	 32	28

1 Environmental issues are Italy's top three concerns – extreme weather and forest fires (82 index points), climate change (78), and the destruction of natural habitats (76) rank highest on the risk index, with all three showing increases since last year. The heightened sentiments of immanence (between 65 and 70 percent) for these issues underscore their perceived urgency.

2 There has been a dramatic shift in how Italian respondents perceive the risk posed by radical Islamic terrorism, dropping by eight index points. Meanwhile, concerns about cyberattacks have increased by three points and now rank higher.

3 Weapons-related threats show a striking preparedness gap. While nuclear, biological, and chemical weapons have relatively low risk index scores (between 51 and 53), they have some of the highest scores for respondents feeling unprepared at 49 percent.

70% is the share of respondents who feel that the risk of extreme weather and forest fires is imminent

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

Japan

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Climate change generally	73	+3	60	25
China	71	-2	46	35
Extreme weather and forest fires	70	+2	57	24
Russia	70	-4	49	35
Cyberattacks on your country	69	-3	62	26
Destruction of natural habitats	69	+1	55	25
North Korea	68	-1	49	35
Rising inequality	65	+0	54	32
Use of nuclear weapons by an aggressor	61	-5	30	42
International organized crime	60	-1	51	29
Economic or financial crisis of your country	60	-1	42	29
Food shortages	60	+3	39	33
Energy supply disruption	59	-3	36	33
A future pandemic	58	+1	45	21
Use of biological weapons by an aggressor	57	-6	27	42
Use of chemical weapons and poisons by an aggressor	57	-5	26	41
Disinformation campaigns from enemies	57	-4	53	27
Mass migration as a result of war or climate change	54	-1	43	28
Autonomous robots/artificial intelligence	53	+2	53	23
Trade wars	53	-1	44	25
Divisions amongst major global powers	52	+0	37	26
Political polarization	49	+4	47	24
The coronavirus pandemic	48	+0	55	16
Civil war or political violence	48	+1	39	27
Iran	48	-4	37	32
Racism and other discrimination	47	+1	46	26
Radical Islamic terrorism	45	-7	36	32
Breakdown of democracy in my country	44	+1	29	28
Divisions amongst Western powers and institutions	43	-2	33	25
United States	43	+10	34	26
Rapid change to my country's culture	42	+0	33	25
Right-wing terrorism	40	-4	30	28
European Union	30	+3	25	24

1

Environmental risks are major concerns in Japan – climate change ranks highest with a risk index of 73, and it has increased by three points since last year. Along with extreme weather and forest fires (70) and the destruction of natural habitats (69), environmental risks are also perceived as some of the most imminent threats.

2

The risks posed by China, Russia, and North Korea remain near the top of the index, though with the latter two having fallen slightly. With index scores of 71 and 68, respectively, Japanese respondents consider China and North Korea as bigger risks than anyone else.

3

There is a notable disconnect between risk perception and preparedness for certain threats. For instance, the threats of nuclear, biological, and chemical weapons threats have some of the highest scores for respondents feeling unprepared (around 42 percent) despite having relatively low risk index scores (between 57 and 61).

2nd
place

• • • • •

is the ranking of the threat posed by China

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

United Kingdom

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Russia	75	+9	 65	33
Cyberattacks on your country	69	+8	 72	20
Mass migration as a result of war or climate change	63	+3	 59	33
Use of nuclear weapons by an aggressor	62	+11	 47	33
Economic or financial crisis in your country	62	+4	 61	25
Radical Islamic terrorism	61	+2	 64	22
Disinformation campaigns from enemies	61	+6	 67	21
Iran	61	+6	 57	30
Use of chemical weapons and poisons by an aggressor	60	+9	 49	34
Destruction of natural habitats	60	-2	 58	24
Divisions major global powers	60	+0	 57	22
Use of biological weapons by an aggressor	59	+8	 48	34
International organized crime	59	+5	 64	19
Climate change generally	58	-3	 53	23
China	58	+2	 49	32
Energy supply disruption	57	+2	 59	28
Extreme weather and forest fires	56	-4	 56	24
Divisions amongst Western powers and institutions	56	+8	 54	22
Political polarization	55	+6	 59	20
Autonomous robots/artificial intelligence	54	+1	 58	21
Rising inequality	53	-1	 61	22
Racism and other discrimination	52	+1	 63	18
Food shortages	52	+4	 56	29
Trade wars	50	+11	 57	20
Civil war or political violence	49	+8	 49	24
Rapid change to my country's culture	49	+7	 48	28
North Korea	49	+5	 43	27
Right-wing terrorism	47	+2	 55	18
A future pandemic	45	-1	 42	20
Breakdown of democracy in my country	43	+4	 41	28
The coronavirus pandemic	28	-4	 47	15
United States	26	+10	 35	26
European Union	16	+1	 27	21

1

Russia remains the UK's main security concern, maintaining its top position in the risk ranking with a risk index score of 75. The threat from Russia is complemented by a rise in concern about nuclear weapons, which has jumped 12 positions, and chemical weapons, rising nine positions.

2

Environmental concerns show a notable decline in relative priority, with extreme weather and forest fires falling 12 positions, climate change dropping ten positions, and the destruction of natural habitats dropping eight positions.

3

Mass migration as a result of war or climate change and an economic or financial crisis remain central concerns of UK respondents. After Germany and France, the UK is tied with Italy for the third highest index score (63) for mass migration among all the countries surveyed.



+12

is the rise in ranking of the perceived risk of the use of nuclear weapons by an aggressor

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

United States

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Cyberattacks on your country	66	+1	68	19
Russia	60	-2	58	19
Disinformation campaigns from enemies	59	-2	65	21
Extreme weather and forest fires	59	+2	60	21
Political polarization	59	-5	63	22
Destruction of natural habitats	58	+2	56	23
China	57	-6	54	19
Economic or financial crisis in your country	56	-5	59	18
Iran	54	-7	57	19
Divisions amongst major global powers	53	+0	54	19
Use of nuclear weapons by an aggressor	52	-1	48	17
Autonomous robots/artificial intelligence	52	+0	57	23
Climate change generally	52	+2	51	23
Breakdown of democracy in my country	52	-4	51	26
Trade wars	51	+4	60	19
Use of biological weapons by an aggressor	50	-3	45	20
Use of chemical weapons and poisons by an aggressor	48	-4	42	19
Radical Islamic terrorism	48	-10	55	16
Mass migration as a result of war or climate change	48	-8	51	27
Divisions amongst Western powers and institutions	48	-4	52	19
Civil war or political violence	48	-6	52	23
North Korea	48	-1	49	17
International organized crime	47	-2	53	14
Racism and other discrimination	47	-2	60	20
Rapid change to my country's culture	47	-6	51	24
Energy supply disruption	47	-7	49	22
Rising inequality	46	-2	54	21
A future pandemic	45	+0	45	19
Food shortages	44	-5	48	24
Right-wing terrorism	40	-1	48	20
The coronavirus pandemic	27	-8	46	16
European Union	17	-5	29	13

1

Cyberattacks remain the main security concern in the US, maintaining the top spot in the risk ranking, with a risk index score of 66. This is reinforced by a rise in concern among US respondents about Russia as well as disinformation campaigns from enemies, which take second and third place, respectively.

2

Like in all G7 countries except Japan, the perception of the threat from trade wars is up notably in the US, from the 27th to the 15th ranked risk.

3

Concerns about extreme weather and forest fires and the destruction of natural habitats have increased by two index points each since last year to 58 and 59 points, respectively, though environmental risks still score lower in the US than in any other G7 country.

68%

is the share of respondents who feel cyberattacks on the US are imminent

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

Brazil

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Extreme weather and forest fires	82	+2	70	37
Destruction of natural habitats	81	+2	69	37
Climate change generally	80	+1	69	36
Rising inequality	70	-1	63	34
Political polarization	69	+0	66	30
Economic or financial crisis in your country	68	-1	59	36
Disinformation campaigns from enemies	66	-3	64	33
Cyberattacks on your country	64	-2	60	36
Racism and other discrimination	63	-2	64	29
Civil war or political violence	62	+0	57	33
A future pandemic	60	-1	52	34
International organized crime	60	-4	54	36
Divisions amongst major global powers	59	+0	55	31
Breakdown of democracy in my country	58	+2	52	33
Food shortages	58	+0	51	31
Divisions amongst Western powers and institutions	57	-2	58	30
Autonomous robots/artificial intelligence	55	-2	56	36
Mass migration as a result of war or climate change	54	-6	57	30
Trade wars	54	+0	54	29
Use of nuclear weapons by an aggressor	53	-3	47	48
Energy supply disruption	53	+1	49	31
Use of biological weapons by an aggressor	50	-6	43	47
Use of chemical weapons and poisons by an aggressor	49	-7	42	46
Rapid change to my country's culture	48	+1	49	31
Russia	48	-3	45	42
The coronavirus pandemic	46	-1	49	26
Iran	45	-2	44	42
Radical Islamic terrorism	44	-9	44	41
China	44	-3	43	39
Right-wing terrorism	40	-1	46	33
North Korea	39	-2	39	39
United States	38	-1	42	36
European Union	31	-3	36	33

1 Environmental issues dominate Brazilian respondents' concerns, with the top three risks all being environmental in nature: extreme weather and forest fires (at 82 index points), the destruction of natural habitats (81), and climate change (80). These not only have the highest risk index scores across all countries surveyed but also show consistent or increasing concern since the last MSI.

2 Domestic concerns such as rising inequality also score high on the index and cluster near the top. With an index score of 69, Brazilian respondents are more concerned about political polarization than any other country.

3 Geopolitical threats are viewed as relatively minor concerns, with Russia (index score of 48), China (44), North Korea (39), the US (38), and the EU (31) ranking at the bottom of Brazil's risk index. These all show slight declines in concern, suggesting that Brazilian respondents view domestic and environmental challenges as more pressing than international political tensions.

Top 3 risks are all climate-related

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

China

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
United States	42	+0	 32	7
Use of biological weapons by an aggressor	40	-1	 30	8
Use of nuclear weapons by an aggressor	39	+0	 30	10
Use of chemical weapons and poisons by an aggressor	39	+3	 29	7
Cyberattacks on your country	39	-3	 38	10
The coronavirus pandemic	38	+5	 34	10
A future pandemic	38	+3	 34	8
Disinformation campaigns from enemies	38	-2	 36	7
Climate change generally	38	-4	 35	6
Extreme weather and forest fires	38	-2	 31	8
Trade wars	38	-1	 38	7
Destruction of natural habitats	37	-1	 34	7
Divisions amongst major global powers	37	+0	 27	7
International organized crime	34	+0	 28	9
Autonomous robots/artificial intelligence	34	+0	 37	10
Divisions amongst Western powers and institutions	33	+1	 27	8
European Union	33	+2	 26	7
Right-wing terrorism	32	+3	 27	8
Political polarization	32	+3	 27	9
Rising inequality	32	-1	 29	10
Racism and other discrimination	31	+2	 26	10
Economic or financial crisis in your country	31	-1	 29	6
Radical Islamic terrorism	30	+0	 29	8
Mass migration as a result of war or climate change	30	+1	 25	9
Civil war or political violence	28	+4	 23	10
Rapid change to my country's culture	27	-1	 25	9
Energy supply disruption	26	+3	 18	8
Breakdown of democracy in my country	23	+5	 20	11
Food shortages	22	+2	 20	11
Iran	22	+4	 23	14
Russia	18	+0	 20	20
North Korea	17	+1	 21	20

1

The US is viewed as China's top security concern, ranking highest on the risk index at 42 points, and rising two positions compared to last year.

2

Weapons of mass destruction collectively represent a significant concern cluster, with biological weapons (with an index score of 40), nuclear weapons (39), and chemical weapons (39) all ranking near the top of the risk index.

3

There has been a notable increase in concern by Chinese respondents about both the coronavirus pandemic and a future pandemic, increasing by five and three index points respectively. With positions six and seven in the ranking, no other country ranks the risks higher.

7%



is the share of respondents who feel unprepared for the risk posed by the US

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

India

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Climate change generally	54	+0	52	11
Extreme weather and forest fires	51	+3	51	11
Destruction of natural habitats	51	+1	46	11
Cyberattacks on your country	49	-1	52	11
Use of nuclear weapons by an aggressor	46	+4	49	10
Political polarization	46	-1	49	10
Radical Islamic terrorism	45	-1	46	13
China	45	-2	43	12
International organized crime	44	+2	44	12
Disinformation campaigns from enemies	44	-3	50	11
A future pandemic	43	+2	39	12
Autonomous robots/artificial intelligence	43	+1	50	13
Divisions amongst major global powers	43	+0	42	11
Use of biological weapons by an aggressor	42	+0	44	13
Use of chemical weapons and poisons by an aggressor	42	+0	40	13
Mass migration as a result of war or climate change	42	+2	43	12
Racism and other discrimination	42	+1	44	13
Civil war or political violence	42	+1	42	12
Divisions amongst Western powers and institutions	41	+1	43	9
Rising inequality	41	+1	42	12
Right-wing terrorism	40	+0	44	11
Rapid change to my country's culture	40	+1	40	12
Trade wars	39	+1	41	12
Economic or financial crisis in your country	39	+2	39	12
Energy supply disruption	37	+1	39	11
Breakdown of democracy in my country	36	+2	38	12
The coronavirus pandemic	35	+2	41	11
Food shortages	35	+1	38	12
Iran	28	+5	36	12
North Korea	25	+3	33	12
United States	24	+6	31	13
Russia	23	+5	32	14
European Union	22	+7	30	12

1 Environmental and climate concerns dominate Indian respondents' top risks, with climate change generally at 54 points, followed by extreme weather and the destruction of natural habitats, both with an index score of 51.

2 Geopolitical threats show increased concern but remain relatively low priority. While Russia, the US, and the EU saw significant increases in their risk scores (by five, six, and seven points, respectively), they remain at the bottom of Indian respondents' risk ranking, suggesting these powers are viewed as relatively minor threats. In contrast, China is considered the eighth greatest risk, falling one position compared to last year.

3 Cyberattacks are a significant concern, ranking fourth overall with a risk index score of 49. This high ranking, combined with 52 percent of respondents feeling that the risk is imminent, suggests it is viewed as one of the more pressing threats.

Top 3 risks
are all climate-related

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

South Africa

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Economic or financial crisis in your country	72	-11	 62	36
Energy supply disruption	72	-18	 66	33
Climate change generally	71	-2	 65	27
Extreme weather and forest fires	70	-3	 66	31
Destruction of natural habitats	69	-2	 65	30
Rising inequality	67	-8	 63	32
Food shortages	65	-13	 57	35
International organized crime	64	-1	 58	35
Racism and other discrimination	64	-7	 65	28
Cyberattacks on your country	63	-3	 60	30
Political polarization	62	-6	 61	26
Mass migration as a result of war or climate change	59	-3	 55	38
Civil war or political violence	59	-7	 55	33
Disinformation campaigns from enemies	58	-4	 60	32
Breakdown of democracy in my country	58	-9	 52	30
Divisions amongst major global powers	58	+0	 53	32
Divisions amongst Western powers and institutions	56	-5	 53	31
Use of chemical weapons and poisons by an aggressor	54	+0	 40	46
A future pandemic	54	-2	 47	28
Autonomous robots/artificial intelligence	53	-2	 57	33
Rapid change to my country's culture	53	-3	 49	30
Use of nuclear weapons by an aggressor	51	-2	 44	46
Use of biological weapons by an aggressor	51	-2	 42	45
Trade wars	51	-3	 49	32
Russia	44	-7	 43	41
Right-wing terrorism	43	-2	 42	33
Radical Islamic terrorism	43	+1	 41	37
The coronavirus pandemic	41	-1	 47	24
China	41	-7	 44	37
United States	40	-7	 42	36
Iran	37	-3	 41	35
European Union	34	-7	 38	35
North Korea	34	-3	 33	38

1

Economic and energy concerns dominate South African respondents' top risks, with the threats of an economic or financial crisis and energy supply disruption both scoring 72 on the risk index. However, both risks have fallen in terms of index score.

2

Environmental issues cluster near the top of South African respondents' concerns, with climate change, extreme weather and forest fires, and the destruction of natural habitats all ranking in the top five positions and scoring between 69 and 71 points on the risk index.

3

There has been a notable increase in concern about international organized crime in South Africa, up five positions this year to become the eighth place risk. South African respondents remain more concerned about food shortages than any other country, even with the risk dropping by 13 index points since last year.

1st
place

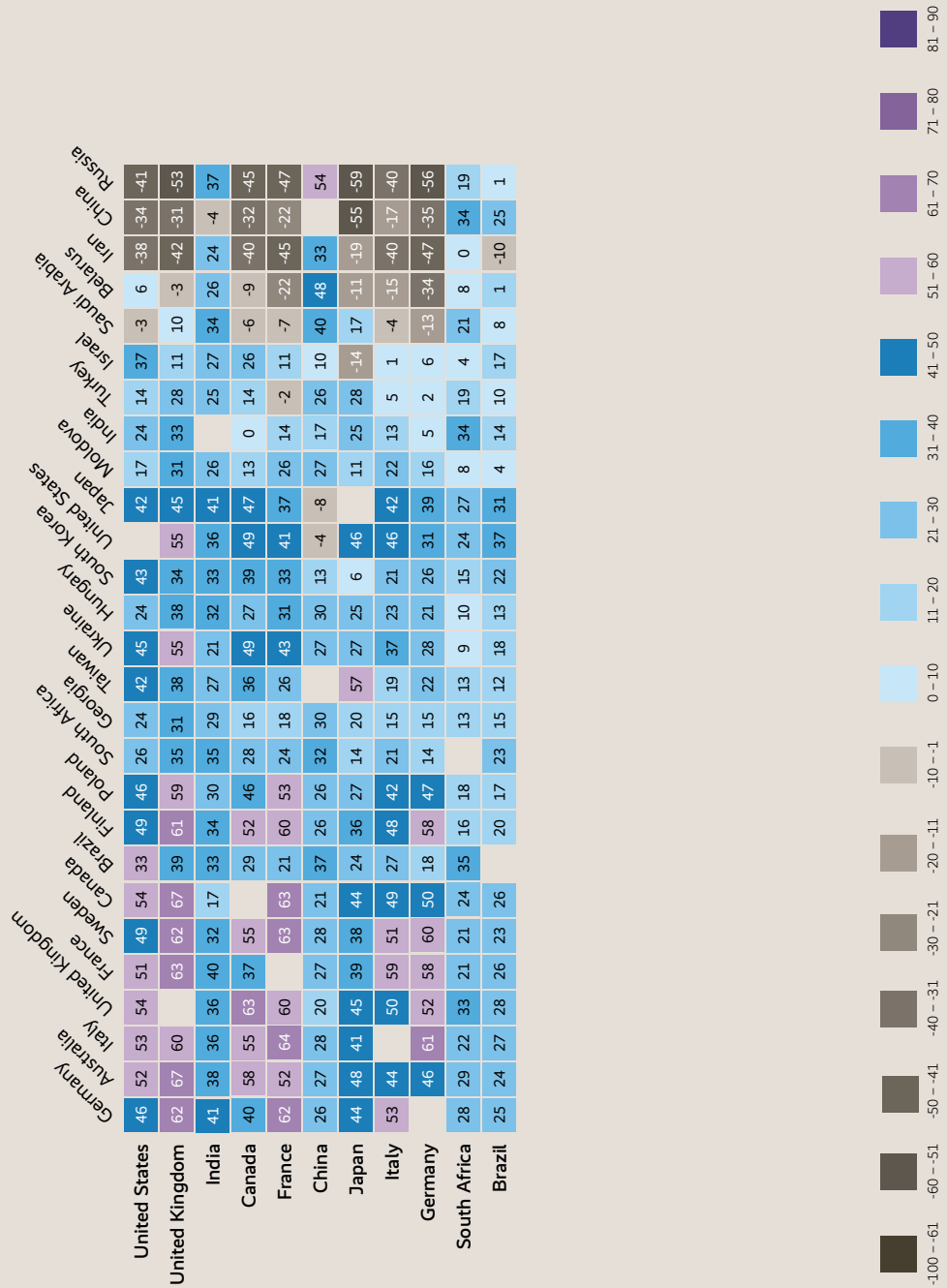


is the ranking of the perceived risk of an economic or financial crisis

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

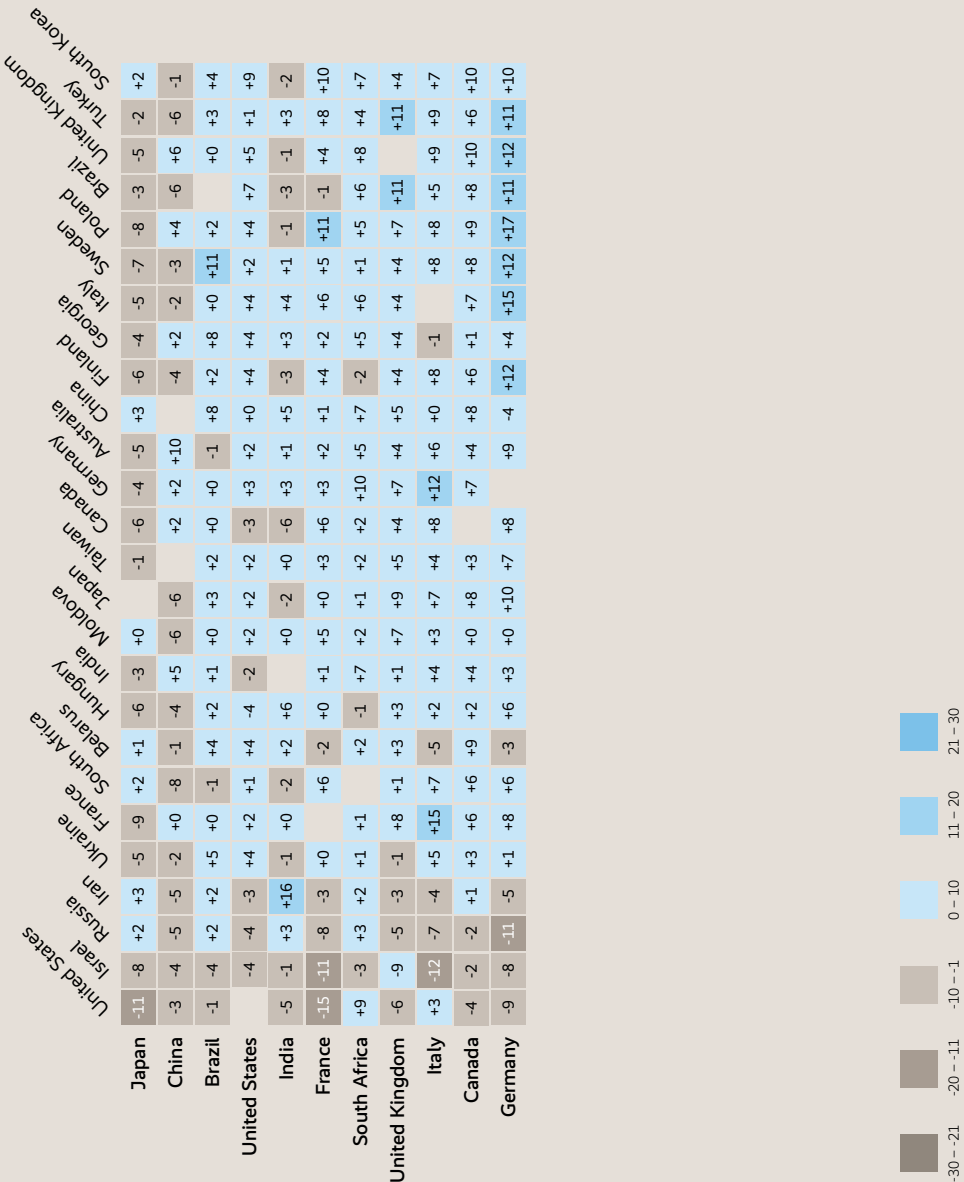
Figure 1.10

Respondents' perceptions of other countries, share saying country is an ally minus share saying country is a threat, November 2024, percent



Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

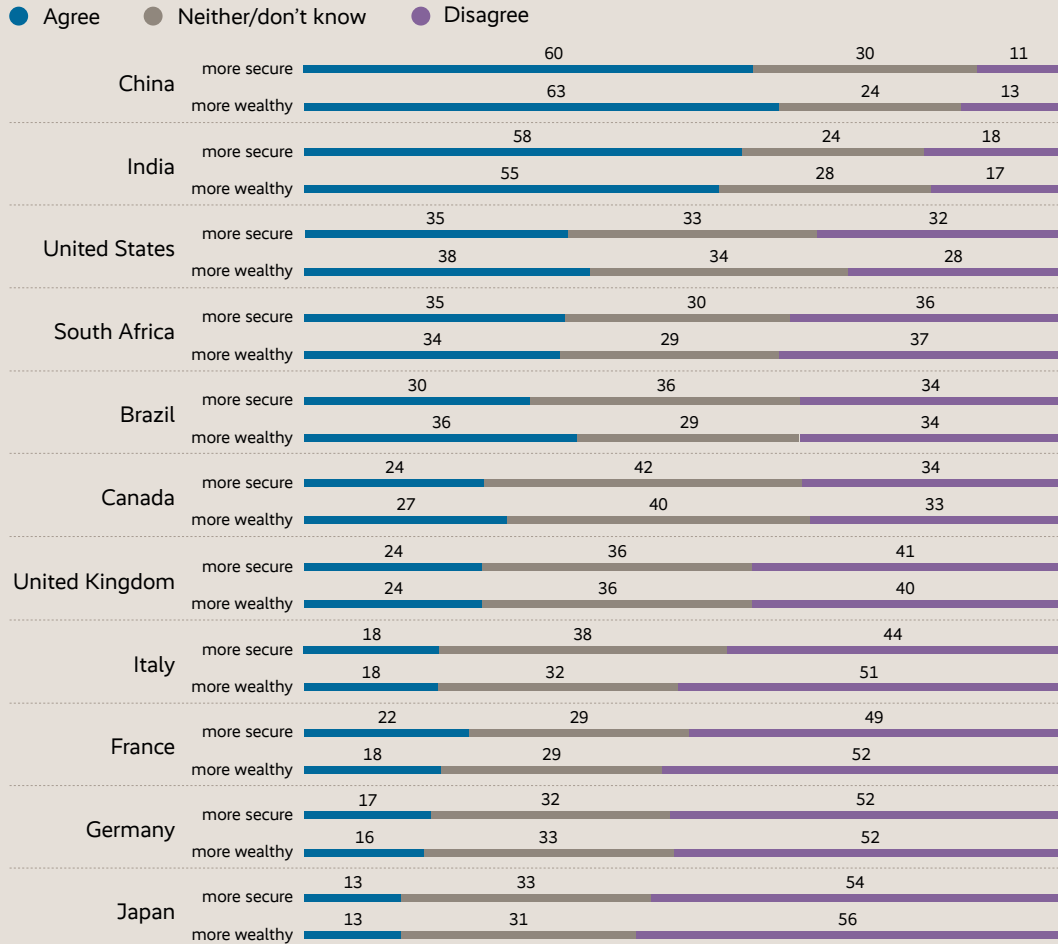
Figure 1.11 Respondents' perceptions of other countries as threats or allies, change between October–November 2023 and November 2024, percent



Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

Figure 1.12

Respondents' perspectives on whether their country will be more secure and wealthy in ten years' time, November 2024, percent



Data and illustration: Kekst CNC, commissioned by the Munich Security Conference