

Munich Security Index 2024

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Munich Security Index 2024

Russia's war on Ukraine marked a *Zeitenwende* across G7 countries. But two years on, there are signs that its impact on risk perceptions is tempering. The threat from Russia and related risks still rank considerably higher than in 2021, but compared to last year, they have dropped in the risk index. Meanwhile, perceptions of nontraditional risks remain high. People around the world continue to be most concerned about environmental threats, while risk perceptions of mass migration as a result of war or climate change, Islamic terrorism, and organized crimes have heightened.

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 12 countries view 32 major risks over time. This edition of the MSI is based on representative samples of 1,000 people from each G7 country and BRICS countries except Russia ("BICS"). A survey with selected questions was also conducted in Ukraine. The total sample thus amounts to 12,000 people. Polling was conducted between October 24 and November 16, 2023, 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 record-high threat perceptions, the MSI 2024 registers aggregate decreases in 21 risk indicators, while ten indicators saw overall increases (Figure 1.6). Almost all indicators related to Russia's war on Ukraine have fallen, including the use of nuclear weapons by an aggressor and energy supply disruptions. While Russia was still the top risk for five G7 countries last year, only the citizens of the UK and Japan still consider it so. German citizens now only see Russia as the seventh greatest concern and Italians see it as the 12th. Other prominent risks have fallen, too. Strikingly,

citizens in all but three countries – Brazil, Japan, and South Africa – have lesser economic anxieties than last year. And both the perceived risk of Covid-19 specifically and a future pandemic generally have dropped.

In contrast, perceptions of nontraditional risks have further increased. Concerns about mass migration as a result of war or climate change and radical Islamic terrorism have surged, though this is driven by countries in Europe and North America and likely fueled by the terrorist attacks by Hamas against Israel and the resulting war (Figure 1.5). The threat of Iran has also risen significantly in the risk index among the G7 countries. Meanwhile, cyberattacks now rank as the top concern in both China and the US. Notwithstanding abounding differences in risk perceptions, citizens around the world continue to share severe concerns about environmental threats. In all countries bar the US, at least one of the three environmental threats covered by the index features in the top three.

Russia's war and the wider geopolitical competition still shape citizens' views of other countries, but less intensely than last year. Belarus, China, Iran, and Russia are the only countries that are seen more as threats than as allies in aggregate (Figure 1.9). After Russia's standing plummeted last year, it has modestly recovered in all countries except Japan, but it remains very low. China, India, and South Africa still consider Russia more an ally than a threat, with Brazil undecided, which stands in marked contrast to views among citizens in the G7 countries. Five of the G7 countries have a more favorable view of China than last year, with Canada and Japan being the exceptions. Strikingly, China sees all countries except Russia and Belarus as more threatening than last year. It is also the only country that sees the US as a threat, if by a fine margin. Ukraine, which enjoyed the greatest increase in last year's index, is still considered an ally by all states, in particular the G7 countries, but to a lesser extent than last year.

Thus, the Munich Security Index 2024 signals a moderation, but not a rupture, of the post-Russian-invasion trends (Figure 1.7). Traditional hard security threats appear to have peaked in 2022, but they remain higher than in 2021. Among the G7 countries, the threat of Russia, for instance, rose from being the 15th greatest concern in 2021, to the top concern in 2022, and dropped to fourth in 2023. The risk of nuclear aggression follows a similar pattern. In the BICS countries, risk perceptions have been less volatile since 2021, suggesting that citizens see Russia's war to be less of a turning point (Figure 1.8). The fact that perceptions of Iran and Russia have remained static, and views of China have even improved, also contrasts markedly with views in the G7 countries.



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Explaining the Index

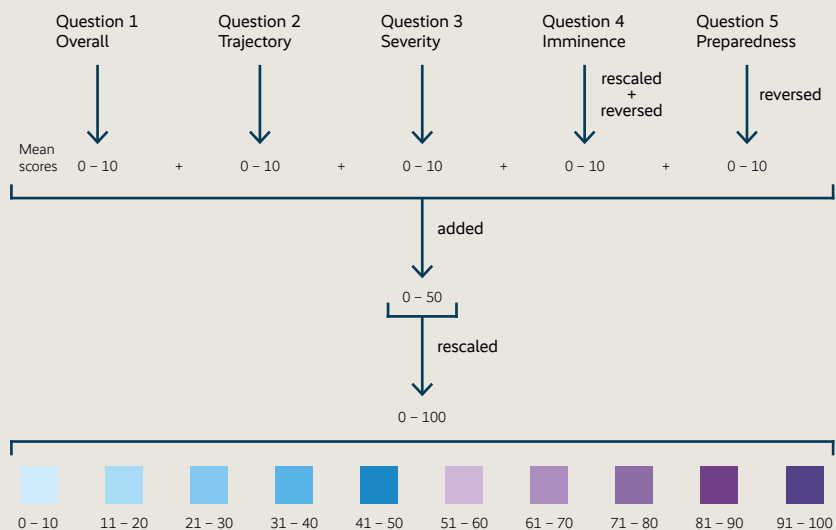
Index components

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 6) that features the G7 countries, Brazil, China, India, and South Africa and how they score on each of the 32 risks covered, the index also includes an overview of how risk perceptions have changed over time (pages 7–9) as well as an overview of how countries perceive other states (page 21).

The index also provides more detailed insights into the individual risk profiles of the countries surveyed (pages 10–20).

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 2022.

Share thinking risk is imminent

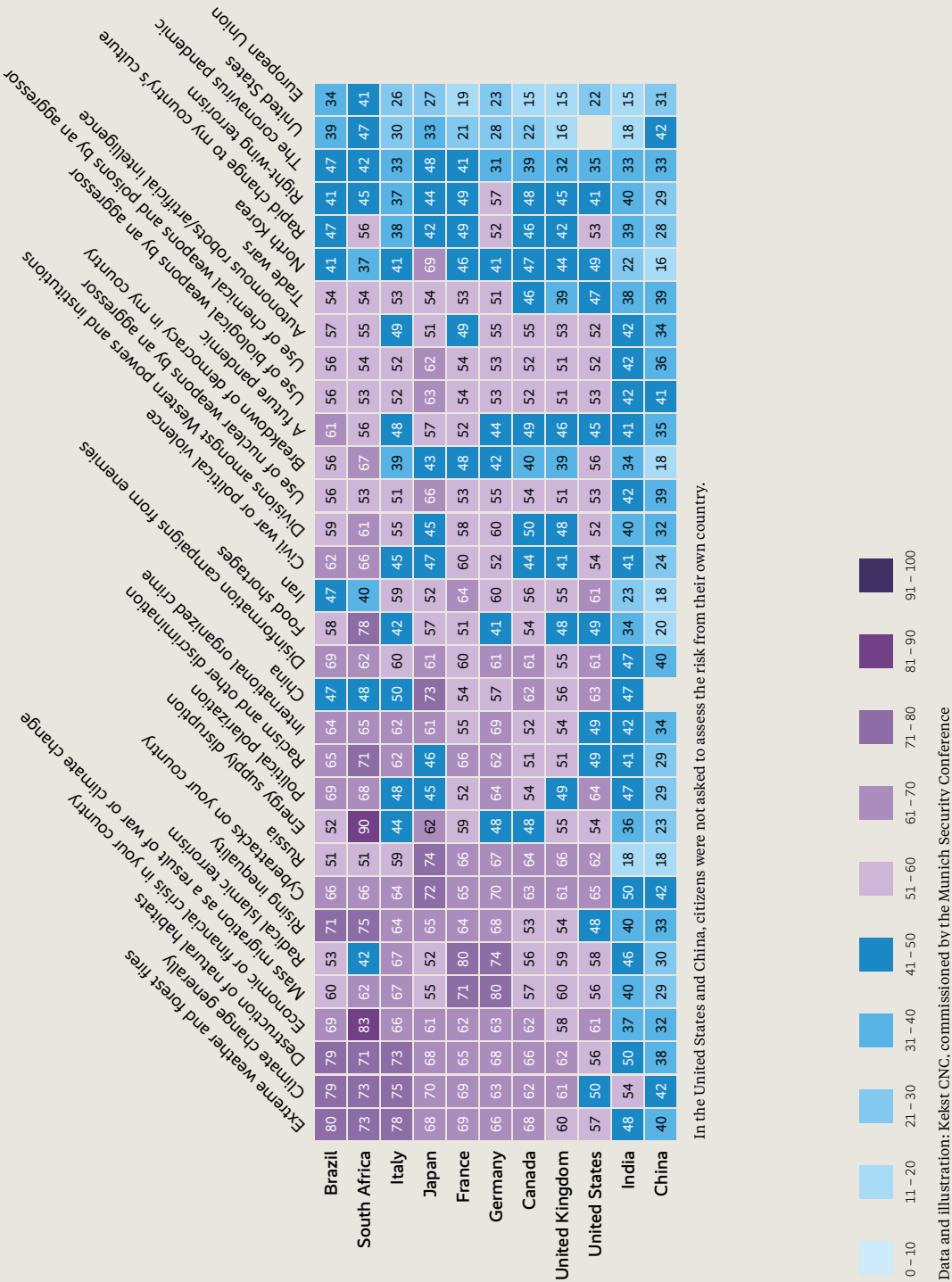
Percentage of respondents who answered “now or in the next few months,” “in the next year,” and “in the next 5 years” in answer to the question “For each of the following, please say how imminent a threat you think it is.”

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 1.5

The risk heatmap, October–November 2023, score

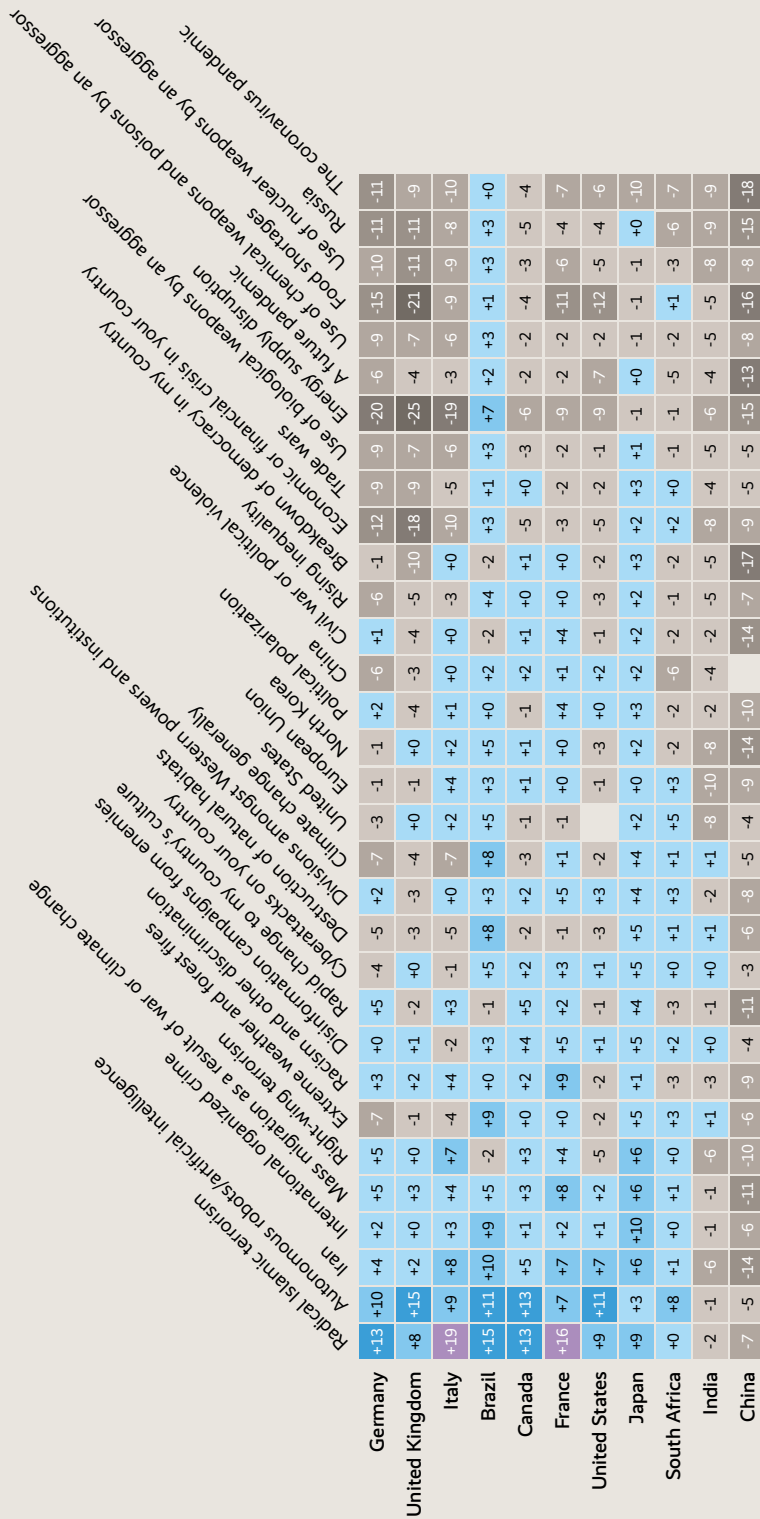


In the United States and China, citizens were not asked to assess the risk from their own country.

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

Figure 1.6

The change heatmap, October–November 2023, change in index score since October–November 2022

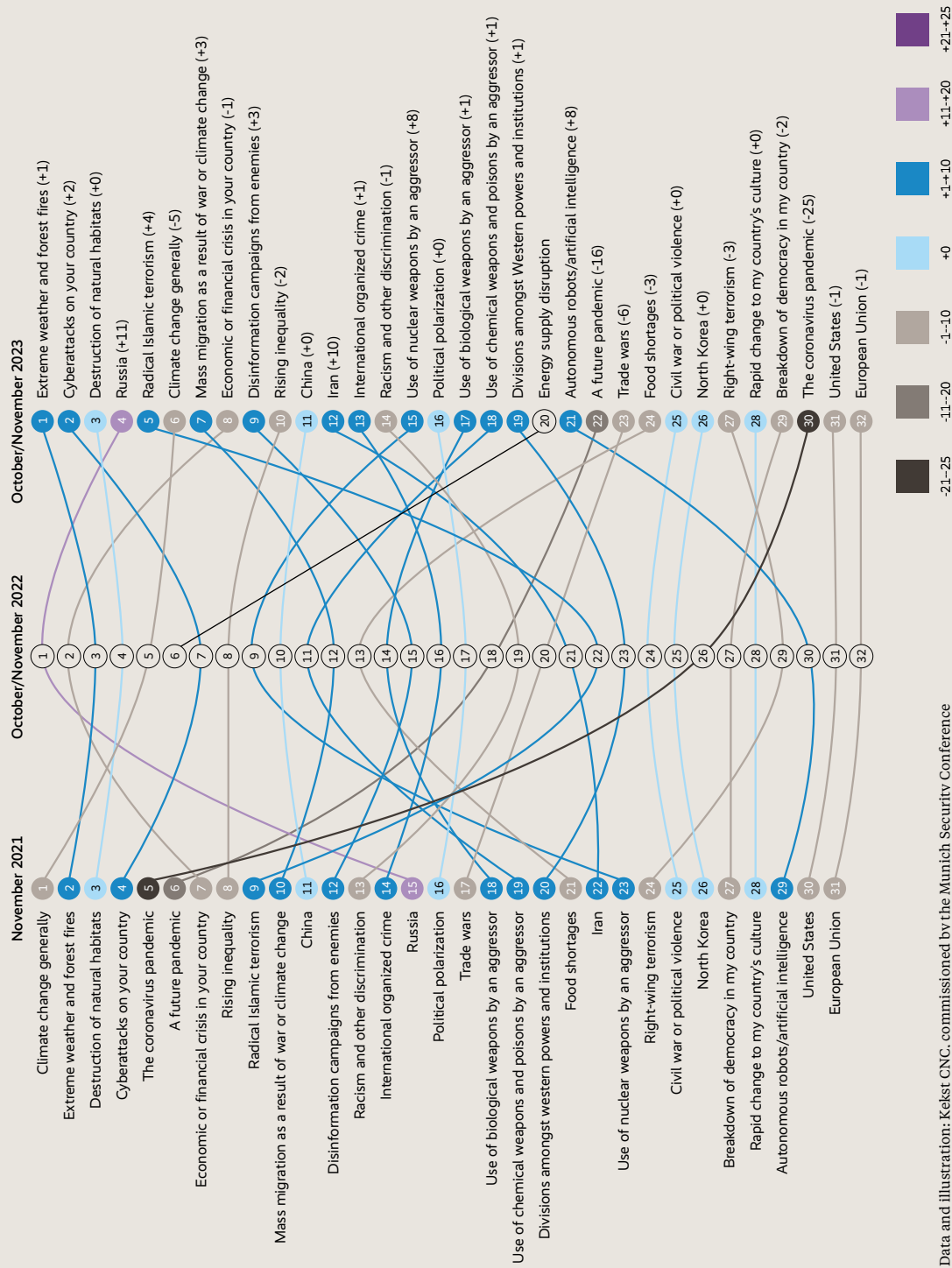


In the United States and China, citizens were not asked to assess the risk from their own country.



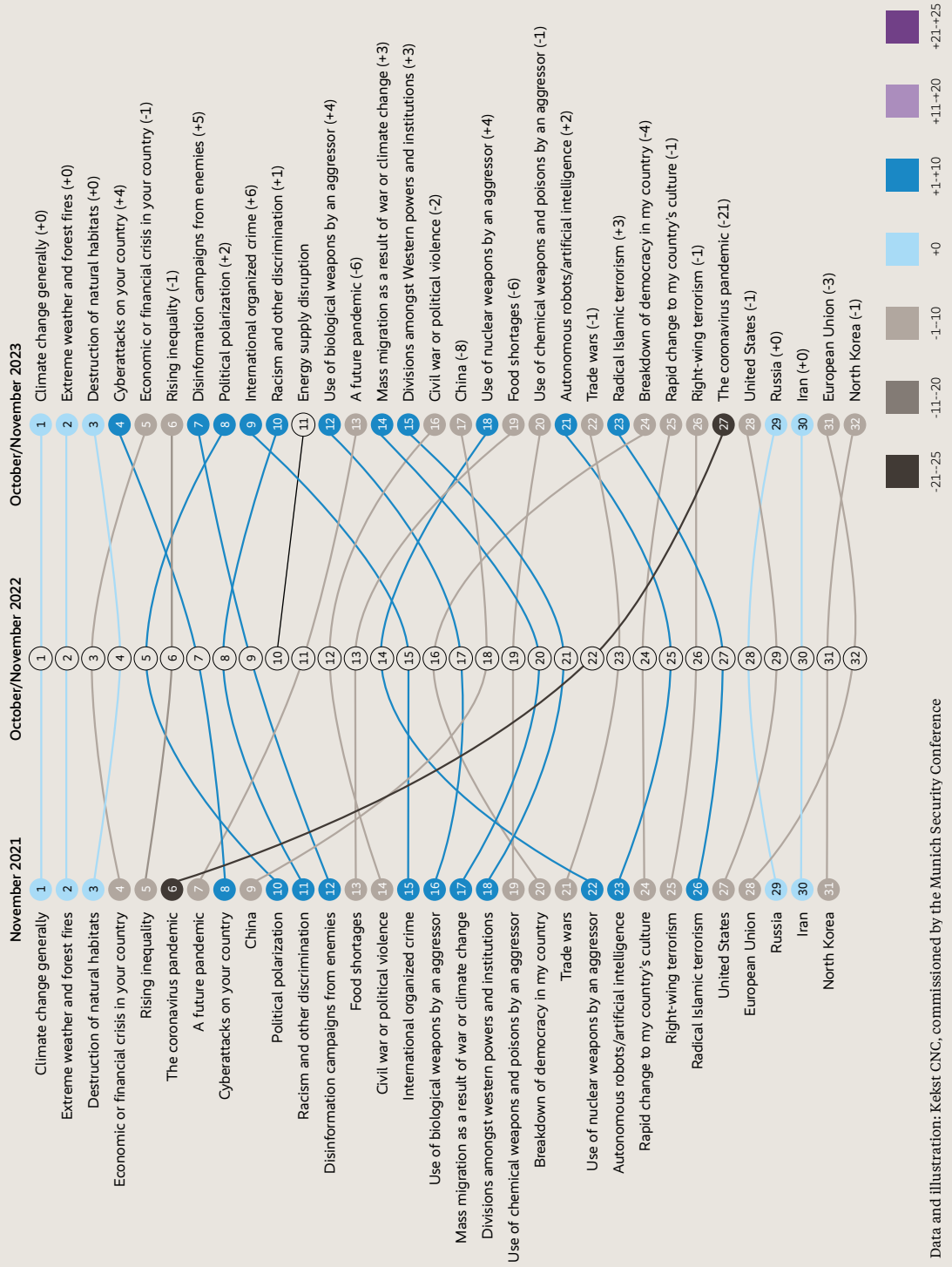
Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

Figure 1.7 The G7 risk bump chart, aggregate ranking of risks by the G7 countries, 2021–2023



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

Figure 1.8 The “BICS” risk bump chart, aggregate ranking of risks by Brazil, China, India, and South Africa, 2021–2023



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	68	+0	64	25
Destruction of natural habitats	66	-2	63	25
Russia	64	-5	54	35
Cyberattacks on your country	63	+2	64	25
Climate change generally	62	-3	60	23
Economic or financial crisis in your country	62	-5	58	28
China	62	+2	52	37
Disinformation campaigns from enemies	61	+4	64	25
Mass migration as a result of war or climate change	57	+3	54	30
Radical Islamic terrorism	56	+13	56	28
Iran	56	+5	49	33
Autonomous robots/artificial intelligence	55	+13	54	28
Use of nuclear weapons by an aggressor	54	-3	42	39
Political polarization	54	-1	57	22
Food shortages	54	-4	51	27
Rising inequality	53	+0	56	24
Use of biological weapons by an aggressor	52	-3	41	41
Use of chemical weapons and poisons by an aggressor	52	-2	43	41
International organized crime	52	+1	55	23
Racism and other discrimination	51	+2	63	18
Divisions amongst Western powers and institutions	50	+2	48	24
A future pandemic	49	-2	47	18
Right-wing terrorism	48	+3	50	24
Energy supply disruption	48	-6	46	25
North Korea	47	+1	39	33
Rapid change to my country's culture	46	+5	45	27
Trade wars	46	+0	49	22
Civil war or political violence	44	+1	44	26
Breakdown of democracy in my country	40	+1	34	29
The coronavirus pandemic	39	-4	57	14
United States	22	-1	28	24
European Union	15	+1	25	23

1 Like several other countries, Canada has seen a considerable increase in its level of concern about radical Islamic terrorism. Since last year, the risk has climbed from 26th place to tenth place. Despite this, Canada has a relatively low level of overall concern on this issue – among the G7, it is only more concerned than Japan.












2 Canadian concern about the threat posed by autonomous robots and artificial intelligence has also seen a striking increase, up from 28th place to 12th place of 32 risks surveyed. Among respondents from G7 countries, Canadians (and Germans) are the most concerned.

3 Canadian concerns about the impact of the Russian invasion of Ukraine have declined over the last year. Energy supply disruption has also dropped in the risk ranking, from 15th place to 24th place.

+16 is the rise in ranking of the perceived risk of autonomous robots and artificial intelligence

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	80	+16	 74	21
Mass migration as a result of war or climate change	71	+8	 65	31
Climate change generally	69	+1	 63	25
Extreme weather and forest fires	69	+0	 67	22
Racism and other discrimination	66	+9	 69	20
Russia	66	-4	 57	27
Cyberattacks on your country	65	+3	 65	19
Destruction of natural habitats	65	-1	 64	24
Rising inequality	64	+0	 65	24
Iran	64	+7	 55	28
Economic or financial crisis in your country	62	-3	 62	23
Disinformation campaigns from enemies	60	+5	 65	19
Civil war or political violence	60	+4	 55	24
Energy supply disruption	59	-9	 59	22
Divisions amongst Western powers and institutions	58	+5	 56	20
International organized crime	55	+2	 58	18
Use of biological weapons by an aggressor	54	-2	 42	24
Use of chemical weapons and poisons by an aggressor	54	-2	 43	27
China	54	+1	 46	27
Use of nuclear weapons by an aggressor	53	-6	 41	22
Trade wars	53	-2	 54	19
A future pandemic	52	-2	 54	18
Political polarization	52	+4	 58	18
Food shortages	51	-11	 51	24
Right-wing terrorism	49	+4	 55	17
Autonomous robots/artificial intelligence	49	+7	 56	20
Rapid change to my country's culture	49	+2	 44	28
Breakdown of democracy in my country	48	+0	 41	29
North Korea	46	+0	 38	26
The coronavirus pandemic	41	-7	 60	13
United States	21	-1	 30	23
European Union	19	+0	 32	19

1

Radical Islamic terrorism has climbed six places to become the most concerning threat to the French, with an index score of 80, up 16 points from last year. This makes France the country with the highest level of concern of any G7 member on the issue of radical Islamic terrorism. France has also seen a seven-point index score increase in the perceived threat posed by Iran.

2

Mass migration as a result of war or climate change is now seen as the second most serious threat facing France. This follows an eight-point index score increase, moving up from ninth place, that now makes France the second most concerned G7 member on this issue, after Germany.

3

The threat of racism and other forms of discrimination has climbed eight places, from the 13th most serious threat facing France last year to the fifth today. France is now the G7 member with the highest level of concern on this issue.



+16

is the increase in the perceived risk of radical Islamic terrorism

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	80	+5	71	46
Radical Islamic terrorism	74	+13	70	38
Cyberattacks on your country	70	-4	72	36
International organized crime	69	+2	70	34
Destruction of natural habitats	68	-5	66	34
Rising inequality	68	-6	66	37
Russia	67	-11	59	43
Extreme weather and forest fires	66	-7	67	32
Political polarization	64	+2	71	30
Climate change generally	63	-7	60	32
Economic or financial crisis in your country	63	-12	59	35
Racism and other discrimination	62	+3	68	31
Disinformation campaigns from enemies	61	+0	70	33
Divisions amongst Western powers and institutions	60	+2	56	35
Iran	60	+4	55	39
Right-wing terrorism	57	+5	63	27
China	57	-6	50	43
Use of nuclear weapons by an aggressor	55	-10	40	53
Autonomous robots/artificial intelligence	55	+10	60	36
Use of biological weapons by an aggressor	53	-9	39	53
Use of chemical weapons and poisons by an aggressor	53	-9	39	52
Civil war or political violence	52	+1	48	36
Rapid change to my country's culture	52	+5	50	36
Trade wars	51	-9	49	33
Energy supply disruption	48	-20	46	32
A future pandemic	44	-6	52	23
Breakdown of democracy in my country	42	-1	38	39
Food shortages	41	-15	41	29
North Korea	41	-1	38	38
The coronavirus pandemic	31	-11	57	20
United States	28	-3	34	33
European Union	23	-1	31	27

1

Russia, last year rated as Germany's most serious threat, has fallen by 11 index points and is now ranked the seventh most serious threat. Germans are similarly less concerned now about the threats posed by nuclear, chemical, and biological weapons, with each falling by nine to ten index points.

2

Economic anxieties are also weaker than they were this time last year. The perceived risk posed by an economic or financial crisis has fallen out of the top ten threats facing Germany – from third to 11th place – while that of energy supply disruption has dropped dramatically from ninth to 25th place.

3

As in many other countries, the Hamas terrorist attack on October 7 appears to have prompted a spike in German concern about radical Islamic terrorism, which increased by 13 index points, climbing from 16th place to second place. Mass migration as a result of war and climate change has increased by five index points to take first place. Germany now has the highest level of concern about mass migration among the countries surveyed.

+13

is the change in index score for radical Islamic terrorism

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	78	-4	68	35
Climate change generally	75	-7	65	33
Destruction of natural habitats	73	-5	64	34
Radical Islamic terrorism	67	+19	64	31
Mass migration as a result of war or climate change	67	+4	61	32
Economic or financial crisis in your country	66	+10	60	32
Cyberattacks on your country	64	-1	68	23
Rising inequality	64	-3	62	29
International organized crime	62	+3	62	26
Racism and other discrimination	62	+4	64	26
Disinformation campaigns from enemies	60	-2	63	26
Russia	59	-8	48	38
Iran	59	+8	49	37
Divisions amongst Western powers and institutions	55	+0	55	27
Trade wars	53	-5	51	28
Use of biological weapons by an aggressor	52	-6	39	48
Use of chemical weapons and poisons by an aggressor	52	-6	40	47
Use of nuclear weapons by an aggressor	51	-9	36	47
China	50	+0	42	37
Autonomous robots/artificial intelligence	49	+9	53	24
A future pandemic	48	-3	47	23
Political polarization	48	+1	51	23
Civil war or political violence	45	+0	41	31
Energy supply disruption	44	-19	38	32
Food shortages	42	-9	37	33
North Korea	41	+2	36	33
Breakdown of democracy in my country	39	+0	34	34
Rapid change to my country's culture	38	+3	32	30
Right-wing terrorism	37	+7	40	27
The coronavirus pandemic	33	-10	50	17
United States	30	+2	32	35
European Union	26	+4	32	29

1

Among the G7, Italians are the most concerned about the threat posed by climate change, giving the issue an index score of 75. Environmental issues – extreme weather and forest fires, the destruction of natural habitats, and climate change generally – make up Italy's top three threats, as they did last year.

2

On the contrary, Italy is the least concerned member of the G7 with respect to the threats posed by both Russia and China, with index scores of 59 and 50, respectively.

3

Italy has seen a considerable increase in the level of concern about radical Islamic terrorism, increasing by 19 index points since last year (the biggest increase seen on any issue) and climbing from 22nd place to fourth place in Italy's rankings.

75

is Italy's risk index score for climate change

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
Russia	74	+0	55	36
China	73	+2	50	34
Cyberattacks on your country	72	+5	63	29
Climate change generally	70	+4	57	26
North Korea	69	+2	48	34
Extreme weather and forest fires	68	+5	58	26
Destruction of natural habitats	68	+5	53	27
Use of nuclear weapons by an aggressor	66	-1	33	46
Rising inequality	65	+2	53	31
Use of biological weapons by an aggressor	63	+1	30	46
Use of chemical weapons and poisons by an aggressor	62	-1	29	46
Energy supply disruption	62	-1	35	34
International organized crime	61	+10	52	31
Disinformation campaigns from enemies	61	+5	57	31
Economic or financial crisis of your country	61	+2	40	30
A future pandemic	57	+0	44	25
Food shortages	57	-1	33	33
Mass migration as a result of war or climate change	55	+6	44	31
Trade wars	54	+3	43	26
Radical Islamic terrorism	52	+9	41	37
Iran	52	+6	39	33
Autonomous robots/artificial intelligence	51	+3	52	26
The coronavirus pandemic	48	-10	58	18
Civil war or political violence	47	+2	38	28
Racism and other discrimination	46	+1	46	25
Political polarization	45	+3	41	25
Divisions amongst Western powers and institutions	45	+4	34	27
Right-wing terrorism	44	+6	32	31
Breakdown of democracy in my country	43	+3	26	29
Rapid change to my country's culture	42	+4	31	27
United States	33	+2	22	27
European Union	27	+0	20	26

1 Of all countries surveyed, Japanese respondents are the most concerned about the threat posed by Russia. They give the Russian threat an index score of 74 – the same as last year – meaning it is again perceived as the most serious threat facing Japan.

2 Similarly, Japan is now the most concerned about the risk posed by China. With an index score of 73 (up two points from last year), China is narrowly ranked below Russia. It is likely related that Japan is also the country with the highest perceived threat of cyberattacks, with an index score of 72.

3 The last year has seen a marked increase in the Japanese level of concern about international organized crime – rising by ten index points to climb from 18th place to 13th place.

74 is Japan's risk index score for Russia

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	66	-11	 68	27
Destruction of natural habitats	62	-3	 62	25
Cyberattacks on your country	61	+0	 67	16
Climate change generally	61	-4	 59	25
Extreme weather and forest fires	60	-1	 63	25
Mass migration as a result of war or climate change	60	+3	 59	29
Radical Islamic terrorism	59	+8	 59	16
Economic or financial crisis in your country	58	-18	 73	33
China	56	-3	 57	28
Disinformation campaigns from enemies	55	+1	 65	18
Energy supply disruption	55	-25	 78	34
Iran	55	+2	 56	23
International organized crime	54	+0	 63	16
Rising inequality	54	-5	 64	28
Autonomous robots/artificial intelligence	53	+15	 43	20
Use of nuclear weapons by an aggressor	51	-11	 54	24
Use of biological weapons by an aggressor	51	-7	 53	25
Use of chemical weapons and poisons by an aggressor	51	-7	 54	26
Racism and other discrimination	51	+2	 62	16
Political polarization	49	-4	 60	21
Division amongst Western powers and institutions	48	-3	 53	21
Food shortages	48	-21	 72	32
A future pandemic	46	-4	 56	18
Right-wing terrorism	45	+0	 56	17
North Korea	44	+0	 43	22
Rapid change to my country's culture	42	-2	 46	25
Civil war or political violence	41	-4	 48	23
Breakdown of democracy in my country	39	-10	 47	29
Trade wars	39	-9	 57	20
The coronavirus pandemic	32	-9	 64	14
United States	16	+0	 26	24
European Union	15	-1	 28	19

1

The British are much less concerned about the economy than they were this time last year. The risks posed by an economic or financial crisis, food shortages, and energy supply disruption have fallen by 18, 21, and 25 index points, respectively – the latter being the biggest change observed for any risk in any country. Respondents in the UK are now less concerned about an economic crisis than other countries surveyed, bar India and China.

2

Following a year which saw ChatGPT burst into the public consciousness, the perceived risk posed by autonomous robots and artificial intelligence has increased by 15 index points. This is the biggest increase seen in any country, although concern is heightened everywhere but in India and China.

3

While concern about Russia has fallen by 11 index points in absolute terms, Russia is now seen as the most serious threat facing the UK.

-25

is the change in index score for energy supply disruption

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	65	+1	66	18
Political polarization	64	+0	65	23
China	63	+2	57	22
Russia	62	-4	57	19
Disinformation campaigns from enemies	61	+1	65	20
Economic or financial crisis in your country	61	-5	59	24
Iran	61	+7	60	19
Radical Islamic terrorism	58	+9	60	18
Extreme weather and forest fires	57	-2	60	21
Destruction of natural habitats	56	-3	56	21
Mass migration as a result of war or climate change	56	+2	56	29
Breakdown of democracy in my country	56	-2	52	29
Civil war or political violence	54	-1	54	23
Energy supply disruption	54	-9	54	24
Use of nuclear weapons by an aggressor	53	-5	47	16
Use of biological weapons by an aggressor	53	-1	46	19
Rapid change to my country's culture	53	-1	52	24
Use of chemical weapons and poisons by an aggressor	52	-2	46	18
Autonomous robots/artificial intelligence	52	+11	58	21
Divisions amongst Western powers and institutions	52	+3	53	20
Climate change generally	50	-2	52	21
International organized crime	49	+1	54	16
Racism and other discrimination	49	-2	58	20
Food shortages	49	-12	50	23
North Korea	49	-3	49	17
Rising inequality	48	-3	54	20
Trade wars	47	-2	55	19
A future pandemic	45	-7	48	17
Right-wing terrorism	41	-5	52	17
The coronavirus pandemic	35	-6	53	14
European Union	22	-1	33	14

1 Among US respondents, concern about political polarization remains high, increasing two places since last year to become the second-greatest perceived threat. This is the highest ranking for the risk of polarization among countries surveyed.

2 The US is the third-least concerned about inequality, behind India and China, having fallen three index points over the past year.

3 Other than China, the US is the least concerned with respect to the threat posed by climate change of all surveyed countries. Americans give climate change an index score of 50 (down two points from last year), thus ranking it 21st out of 32 risks overall. The US does show more concern about extreme weather events and the destruction of natural habitats, but still rates these less seriously than the other members of the G7.

2nd place
is the ranking of the perceived risk of political polarization

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	80	+9	 70	36
Climate change generally	79	+8	 67	36
Destruction of natural habitats	79	+8	 69	36
Rising inequality	71	+4	 64	35
Disinformation campaigns from enemies	69	+3	 64	33
Political polarization	69	+0	 65	31
Economic or financial crisis in your country	69	+3	 59	36
Cyberattacks on your country	66	+5	 59	36
Racism and other discrimination	65	+0	 67	28
International organized crime	64	+9	 57	39
Civil war or political violence	62	-2	 56	35
A future pandemic	61	+2	 53	31
Mass migration as a result of war or climate change	60	+5	 60	32
Divisions amongst Western powers and institutions	59	+3	 55	33
Food shortages	58	+1	 51	34
Autonomous robots/artificial intelligence	57	+11	 57	35
Use of nuclear weapons by an aggressor	56	+3	 45	52
Use of biological weapons by an aggressor	56	+3	 45	50
Use of chemical weapons and poisons by an aggressor	56	+3	 44	50
Breakdown of democracy in my country	56	-2	 46	34
Trade wars	54	+1	 56	31
Radical Islamic terrorism	53	+15	 51	46
Energy supply disruption	52	+7	 45	35
Russia	51	+3	 45	43
The coronavirus pandemic	47	+0	 52	23
Rapid change to my country's culture	47	-1	 46	30
China	47	+2	 46	41
Iran	47	+10	 45	41
Right-wing terrorism	41	-2	 44	35
North Korea	41	+5	 39	40
United States	39	+5	 39	40
European Union	34	+3	 37	37

1

Concern about the climate and environmental threats has been increasing among Brazilians. The risk of extreme weather and forest fires is up nine points compared to last year, replacing climate change as the top perceived risk.

2

The risk of political polarization is down two places this year.

3

The risk posed by international organized crime is up five places since last year, now ranked 10th overall. The risk posed by autonomous robots and artificial intelligence has jumped up eight places, consistent with an upward trend among all countries surveyed.



+9

is the index score increase of the perceived risk of extreme weather and forest fires

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
Cyberattacks on your country	42	-3	 47	6
Climate change generally	42	-5	 44	5
United States	42	-4	 39	4
Use of biological weapons by an aggressor	41	-5	 29	7
Disinformation campaigns from enemies	40	-4	 47	6
Extreme weather and forest fires	40	-6	 42	5
Use of nuclear weapons by an aggressor	39	-8	 29	6
Trade wars	39	-5	 42	6
Destruction of natural habitats	38	-6	 39	5
Use of chemical weapons and poisons by an aggressor	36	-8	 25	6
A future pandemic	35	-13	 39	6
International organized crime	34	-6	 37	7
Autonomous robots/artificial intelligence	34	-5	 41	7
The coronavirus pandemic	33	-18	 44	6
Rising inequality	33	-7	 35	8
Divisions amongst Western powers and institutions	32	-8	 35	8
Economic or financial crisis in your country	32	-9	 29	7
European Union	31	-9	 30	5
Radical Islamic terrorism	30	-7	 33	8
Right-wing terrorism	29	-10	 33	9
Political polarization	29	-10	 32	7
Mass migration as a result of war or climate change	29	-11	 29	8
Racism and other discrimination	29	-9	 35	9
Rapid change to my country's culture	28	-11	 28	7
Civil war or political violence	24	-14	 26	7
Energy supply disruption	23	-15	 19	7
Food shortages	20	-16	 19	6
Breakdown of democracy in my country	18	-17	 18	10
Russia	18	-15	 22	11
Iran	18	-14	 23	11
North Korea	16	-14	 21	12

1

The risk posed by the US is now among the top three risks perceived by Chinese respondents. It is ranked third, up four places since last year.

2

After a spike in overall perceived risks last year, Chinese concern has dropped this year on all risk surveyed in this ranking.

3

The top three risks have completely changed since last year, with cyberattacks now at the top of the list. Moreover, climate change is now perceived as the second biggest risk, even as it is down five points since last year.

3rd
place

is the ranking
of the threat 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	+1	52	11
Cyberattacks on your country	50	+0	55	8
Destruction of natural habitats	50	+1	50	11
Extreme weather and forest fires	48	+1	49	10
Disinformation campaigns from enemies	47	+0	49	10
Political polarization	47	-2	51	10
China	47	-4	46	10
Radical Islamic terrorism	46	-2	48	14
Use of nuclear weapons by an aggressor	42	-8	42	9
Use of biological weapons by an aggressor	42	-5	39	15
Use of chemical weapons and poisons by an aggressor	42	-5	37	13
International organized crime	42	-1	49	10
Autonomous robots/artificial intelligence	42	-1	49	12
A future pandemic	41	-4	42	12
Racism and other discrimination	41	-3	45	9
Civil war or political violence	41	-2	43	10
Right-wing terrorism	40	-6	46	11
Mass migration as a result of war or climate change	40	-1	44	10
Divisions amongst Western powers and institutions	40	-2	43	9
Rising inequality	40	-5	42	11
Rapid change to my country's culture	39	-1	39	13
Trade wars	38	-4	42	8
Economic or financial crisis in your country	37	-8	39	9
Energy supply disruption	36	-6	37	9
Breakdown of democracy in my country	34	-5	34	13
Food shortages	34	-5	37	10
The coronavirus pandemic	33	-9	40	12
Iran	23	-6	31	9
North Korea	22	-8	29	9
Russia	18	-9	30	10
United States	18	-8	26	10
European Union	15	-10	26	9

1 Compared to last year, the perceived threat posed by China fell from second place to seventh place among Indian respondents. This corresponds to a four-point drop in the overall index score, with only ten percent of respondents now saying that they feel unprepared to deal with China.

2 The threat of extreme weather and forest fires is up seven places to fourth position, while climate change is still seen as the top risk in India. The closing gap between these two risks might reflect the fact that Indian respondents are increasingly linking these two threats.

3 In line with the global trend, cyberattacks rank as the second biggest risk in India, up two places since last year.

10% is the share of respondents who feel unprepared for the threat posed by China

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
Energy supply disruption	90	-1	79	46
Economic or financial crisis in your country	83	+2	69	44
Food shortages	78	+1	70	43
Rising inequality	75	-1	71	39
Climate change generally	73	+1	65	34
Extreme weather and forest fires	73	+3	71	32
Destruction of natural habitats	71	+1	66	34
Racism and other discrimination	71	-3	70	31
Political polarization	68	-2	66	30
Breakdown of democracy in my country	67	-2	59	38
Cyberattacks on your country	66	+0	63	36
Civil war or political violence	66	-2	57	38
International organized crime	65	+0	57	37
Disinformation campaigns from enemies	62	+2	63	33
Mass migration as a result of war or climate change	62	+1	58	40
Divisions amongst Western powers and institutions	61	+3	57	34
A future pandemic	56	-5	50	28
Rapid change to my country's culture	56	-3	54	33
Autonomous robots/artificial intelligence	55	+8	57	36
Use of chemical weapons by an aggressor	54	-2	42	49
Trade wars	54	+0	52	35
Use of nuclear weapons by an aggressor	53	-3	37	47
Use of biological weapons by an aggressor	53	-1	43	48
Russia	51	-6	47	43
China	48	-6	48	38
United States	47	+5	45	37
Right-wing terrorism	45	+0	44	36
The coronavirus pandemic	42	-7	53	22
Radical Islamic terrorism	42	+0	40	40
European Union	41	+3	42	37
Iran	40	+1	41	40
North Korea	37	-2	36	42

1

South Africa is the country with the most stable top three risks. Compared to the other countries surveyed, it is also an outlier in terms of which risks are seen as most serious. Energy supply disruption remains the top risk for South Africans. At 90 index points, down just one point from last year, this is the highest rating that any country has given to a risk that it faces.

2

South Africans also remain deeply concerned about the risk of an economic or financial crisis. While this has receded in most other countries, in South Africa, it is up two points from last year.

3

Climate change is up one place to fifth position for South Africans.

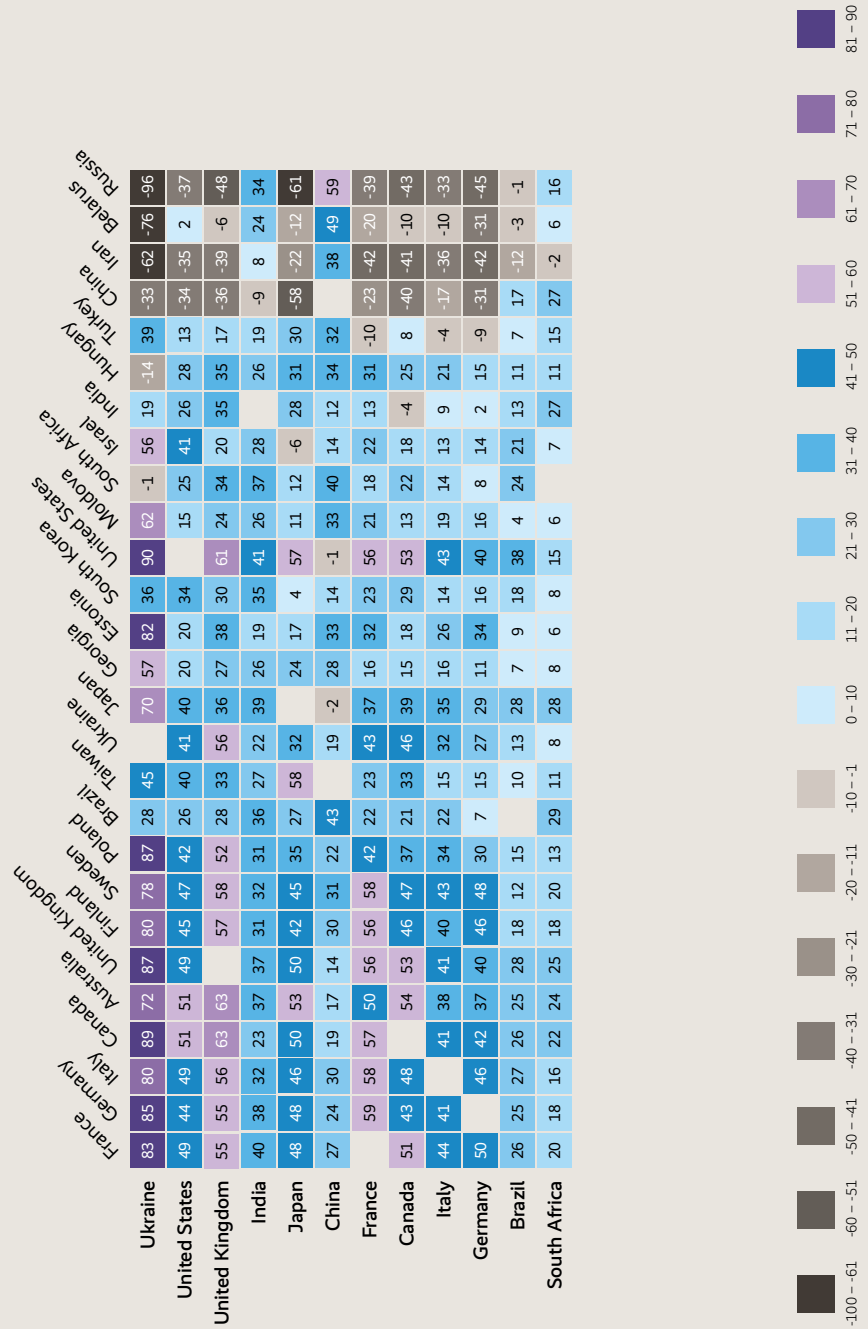
90

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is the South African risk index score for energy supply disruption

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

Figure 1.9
 Citizens' perceptions of other countries, share saying country is an ally minus share saying country is a threat,
 October–November 2023, percent



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