

# Munich Security Index 2021

Appendix to the Munich Security Report 2021  
With Additional Survey Results and Analysis

A joint project with



# Summary

How do states with decisive influence in the global realm view each other and core global risks? By presenting exclusive data on perceptions of risk that pervade the societies of G7 and BRICS countries, our new Munich Security Index provides unique insights into the scope for interstate cooperation on shared global threats as well as into the patterns of cooperation and competition that are shaped by how societies perceive each other.

In an era defined by geopolitical competition and mounting global threats that can only be addressed in cooperation, it is important to assess and compare how people in different parts of the world view some of the most critical global security risks. To this end, the MSC and Kekst CNC together have built a new dataset on global risk perceptions: the Munich Security Index. Based on a survey conducted among 12,000 people globally, it provides an in-depth view of how G7 and BRICS nations view risk in 2021.

The Munich Security Index shows that global risk perceptions are highly diverse, suggesting that efforts to jointly tackle the most serious threats to humanity will not face an easy environment. The overall picture painted by the index is one of fragmentation in the West and of parochial risk perceptions elsewhere in the world. If there is something akin to a global consensus on risk, it revolves around climate and the environment. And while the extent of this concern varies across the twelve countries surveyed, a majority of all respondents seem to see China as a major risk.

The Munich Security Index is the latest addition to our annual Munich Security Report. Future editions will closely monitor how risk perceptions in core countries evolve, how they are affected by emerging security threats, and how they are shaped by competition and cooperation among states.

# Introduction:

## The Munich Security Index 2021

The world is facing a new systemic competition between democratic and autocratic systems of rule. While the new geopolitical reality is defined by growing competition, the most critical global security threats – including climate change, arms races, and the ongoing pandemic – require broad-based international cooperation. Against that backdrop, it is essential to understand the risk perceptions that pervade the societies of countries that decisively shape patterns of cooperation and competition in the international realm. After all, how societies perceive each other affects competition and cooperation among them. Moreover, the prospect of jointly addressing global threats depends on the extent to which risk assessments are shared.

The MSC and Kekst CNC together have built a new dataset, the Munich Security Index, to explore citizens' risk perceptions in various parts of the world. By combining [five metrics](#) – from the severity of a risk to its likelihood of developing, from the imminence of a risk to whether it is looming larger or receding – the index, underpinned by a survey of 12,000 people globally, provides an in-depth view of how G7 and BRICS nations view risk in 2021. Is there a global consensus on the risk of climate change? Are the risks posed by China and Russia perceived equally across NATO and the West? By generating answers to these and other core questions about risk, the index provides relevant insights into the types of challenges that lend themselves to cooperative approaches among states and into the mutual assessments of societies that shape cooperation and competition between them.

The overall picture painted by the Munich Security Index is one of fragmentation. As our [risk heatmap](#) shows, risk perceptions among the G7 and BRICS countries are highly diverse – both when it comes to issue-specific risks like the threat from nuclear weapons or political polarization and when it comes to the perception of other countries as risks. The impression of differing views about what or who poses a risk is underpinned by the individual [risk profiles of the twelve countries surveyed](#). Respondents from the G7 and BRICS countries not only vary in the risks they prioritize, they also differ in their general level of risk-awareness. Respondents from Russia, China, and the US, for example, are among those least alarmed by risks overall.



When it comes to the extent to which respondents see [other countries as risks](#), the Munich Security Index reveals fragmentation in the West and parochial risk perceptions elsewhere in the world. There appears to be consensus among respondents on the threat posed by China: in all states surveyed, with the exception of Russia, respondents apportion a high risk to the country. While concern thus seems to be shared, its gravity still varies considerably among global respondents, including within the West. On the threat posed by Russia, there is also no agreement. Respondents from Italy, for instance, have a much more positive view on Russia – indeed viewing it as an ally – when compared to the US, Canada, or European peers. Beyond the West, risk perceptions are equally diverse. While respondents from Russia and China are mostly concerned about the US and worry little about each other, respondents from South Africa see risks from China, Russia, and the US alike. Patterns of variation, both inside and beyond the traditional West, persist when respondents are asked to evaluate others as [allies or threats](#).

As the Munich Security Index shows, diversity is not restricted to country-related risks. It also extends to perceptions of [issue-specific risks](#). The most critical threats to humanity require broad-based international cooperation. If there is something akin to a global consensus on risk, it revolves around climate and the environment: in all countries surveyed, the destruction of natural habitats as well as climate change and extreme weather phenomena are perceived as top risks. Likewise, the Covid-19 pandemic has moved the risk of current and future pandemics to the top of the list among global respondents. Beyond these core risks, however, there is less common ground among the twelve countries surveyed. For instance, among respondents from the G7 and BRICS countries, the extent of concern apportioned to radical Islamic terrorism, civil war or political violence, or the use of nuclear weapons by an aggressor varies widely.

Those who seek to cooperate on global security challenges are not only confronted with diverging risk perceptions among different societies, they are also facing various divides within countries themselves, as respondents' risk perceptions often vary with [demographic characteristics](#).

In light of a complex picture of risk perceptions both inside and beyond the West, efforts to jointly tackle shared global threats do not face an easy environment. Likewise, successfully navigating between cooperation and competition – the two “states of matter” that define the new geopolitical reality – will be a highly challenging task.

## Building the index

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

### Five components

 <p>Overall</p>	<p><b>Question 1 – Overall risk to your country?</b>                  How great a risk do the following things pose to your country?                  • Answers 0-10                  • No rescaling needed</p>
 <p>Trajectory</p>	<p><b>Question 2 – Risk increasing or decreasing over the next 12 months?</b>                  Please say for each of the following whether you think the risk posed in your country will increase, decrease, or stay the same in the next year                  • Answers 0-10                  • No rescaling needed</p>
 <p>Severity</p>	<p><b>Question 3 – How bad would the damage be if it happened?</b>                  For each of the following, please say how bad you think the damage would be in your country if it were to happen or become a major risk                  • Answers 0-10                  • No rescaling needed</p>
 <p>Likelihood</p>	<p><b>Question 4 – How likely to happen?</b>                  For each of the following, please say when, if at all, you think it is likely to happen or become a major risk                  • Answers 1-8                  • Rescale to 0-10 and reverse</p>
 <p>Preparedness</p>	<p><b>Question 5 – How prepared is your country should it happen?</b>                  For each of the following, please say how prepared your country is to deal with this threat                  • Answers 0-10                  • No rescaling, but reversing needed</p>

### Index scores

To produce the final risk index score for each risk in each country we combine mean scores for all five of the inputs above – overall risk, trajectory, severity, likelihood, 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 that can be compared between demographics, countries, and over time.



The overall risk heatmap, 2021, score

	100	86	83	89	65	87	56	69	73	72	37	55	69	61	54	69	59	75	67	47	38	49	53	45	48	33	34	42	31				
Brazil	75	72	74	71	70	60	78	68	61	82	72	42	60	55	73	54	58	69	50	48	61	55	43	43	37	37	48	39					
South Africa	76	75	73	76	68	58	63	49	53	56	42	55	55	44	51	49	40	47	40	39	42	35	33	37	29	35	42	31	22	23			
Italy	73	68	66	70	69	69	63	49	52	62	44	76	65	49	54	52	51	58	51	43	48	41	42	59	41	44	40	52	38	23	20		
France	67	65	65	64	63	64	60	70	54	45	38	41	44	52	49	46	52	40	36	48	37	52	56	38	42	34	47	43	64	37	30		
Japan	64	66	66	66	62	62	59	45	46	53	49	64	58	38	35	37	38	43	25	28	33	41	37	33	54	38	40	32	25	18			
Germany	62	61	62	60	61	60	46	60	53	44	45	46	42	47	41	42	45	38	41	37	33	42	47	37	38	41	39	45	41	27	13		
Canada	62	56	60	62	59	59	45	52	50	48	40	53	44	42	36	43	43	34	32	35	49	36	36	42	34	42	36	19	22				
United Kingdom	59	56	56	58	54	56	49	60	52	48	54	51	47	52	51	46	50	48	46	46	57	29	46	44	51	48	32	33	27	25			
India	48	62	55	53	53	47	64	21	52	27	40	32	39	34	48	33	28	32	26	26	28	36	34	32	5	1	47	32					
Russia	55	54	54	48	54	61	42	58	55	47	57	46	46	47	40	42	45	51	43	40	52	43	50	36	40	38	52	48					
United States	35	34	34	37	29	36	30																										
China																																	

\*In the United States, China, and Russia, citizens were not asked to assess the risk from their own country. In Russia, citizens were not asked about "political polarization," "civil war and political violence," or the "breakdown of democracy."



## Canada: Firm alignment with Europe and the US

	Index	Trajectory	Likelihood	Unprepared
The coronavirus pandemic	62	+11	69	23
Destruction of natural habitats	62	+43	57	24
A future pandemic	61	+38	51	27
Extreme weather and forest fires	61	+45	61	23
Cyberattacks on your country	60	+40	60	26
Climate change generally	60	+45	53	23
China	60	+36	48	35
Disinformation campaigns from enemies	53	+34	59	24
Use of biological weapons by an aggressor	47	+23	30	41
Russia	47	+27	41	33
Radical islamic terrorism	46	+19	48	29
Rising inequality	46	+25	50	22
Use of chemical weapons and poisons by an aggressor	45	+20	29	41
Political polarization	45	+26	48	21
Iran	45	+25	41	30
Racism and other discrimination	44	+18	57	18
Use of nuclear weapons by an aggressor	42	+19	24	41
Mass migration as a result of war or climate change	42	+24	35	30
Trade wars	42	+24	47	20
Right-wing terrorism	41	+19	46	26
Access to food and water	41	+18	36	19
Divisions among Western powers and institutions	41	+22	38	23
North Korea	41	+20	33	32
Autonomous robots-artificial intelligence	39	+22	37	27
Civil war or political violence	38	+13	38	25
Protectionism	38	+18	42	19
Rapid change to my country's culture	37	+22	34	25
Food shortages	37	+18	32	22
Breakdown of democracy in my country	33	+12	28	28
United States	27	+5	28	26
European Union	13	0	19	21

1 The top risks perceived by Canadian respondents are the destruction of natural habitats, the coronavirus pandemic, a future pandemic, extreme weather and forest fires, cyberattacks, climate change generally, and China. 53 percent of Canadians think that the risk from climate change is going to increase in the next 12 months.

2 Respondents from Canada are less worried by a possible breakdown of democracy in the country, by autonomous robots and AI, and by rapid change to Canada's culture – though many of the risks highlighted by Canadians are in line with those that worry European and US respondents.

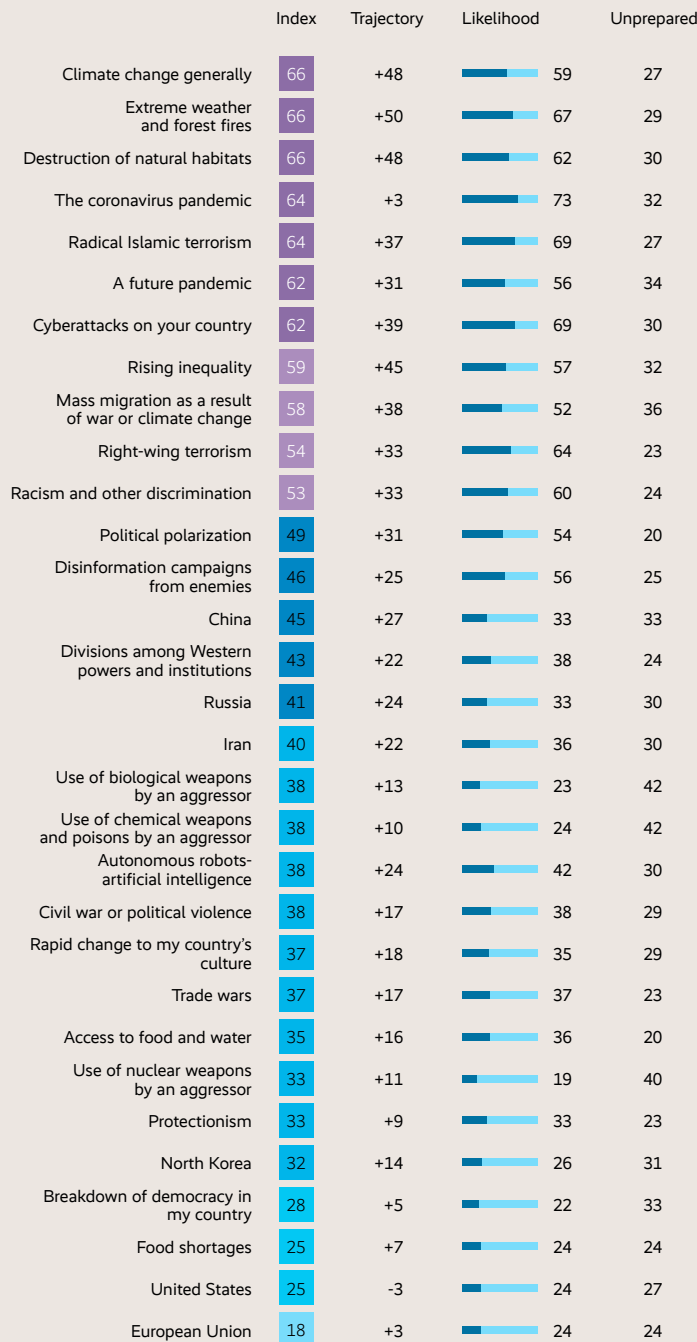
3 Canadian respondents view China as more of a risk than Germans (45), the French (49), and the Americans (58).

47% of Canadian respondents think that trade wars are likely to become a major risk in the next five years.

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



## Germany: At (un)ease



1 The top risks perceived by German respondents are climate change generally, the destruction of natural habitats, extreme weather and forest fires, the coronavirus pandemic, radical Islamic terrorism, and cyberattacks.

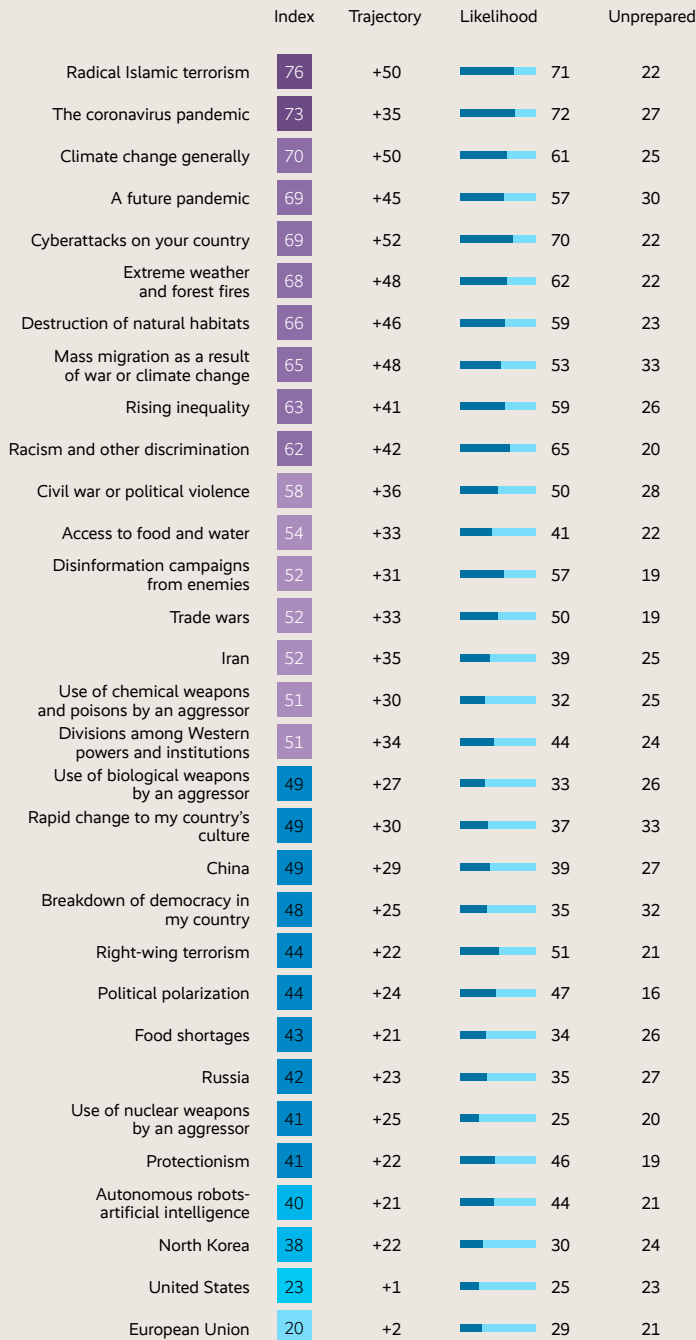
2 On the risk of a breakdown of democracy, Germans are much less concerned than the French (28 compared to 48). The same is true for the risk of civil war or political violence (38 compared to 58). But there are also shared views among the two European partners: German respondents are very concerned by radical Islamic terrorism (64), with the second highest score in the world behind France. Germany is the nation most concerned about the risk of right-wing terrorism (54) among all countries surveyed.

3 On other issues, Germans are less concerned than respondents from other countries. They do not view the use of biological weapons by an aggressor as a major risk (38), with the third-lowest score of all countries surveyed. Germans also perceive China as less of a risk than other respondents in Europe. And they rank second lowest (after respondents from Russia) when it comes to concern about China (45).

67% of respondents in Germany believe that extreme weather and forest fires will be a risk that manifests in the next five years.

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

## France: Terrorism, racism, migration, and political violence



1 The top risks perceived by French respondents are radical Islamic terrorism, the coronavirus pandemic, climate change generally, a future pandemic, and cyberattacks on France.

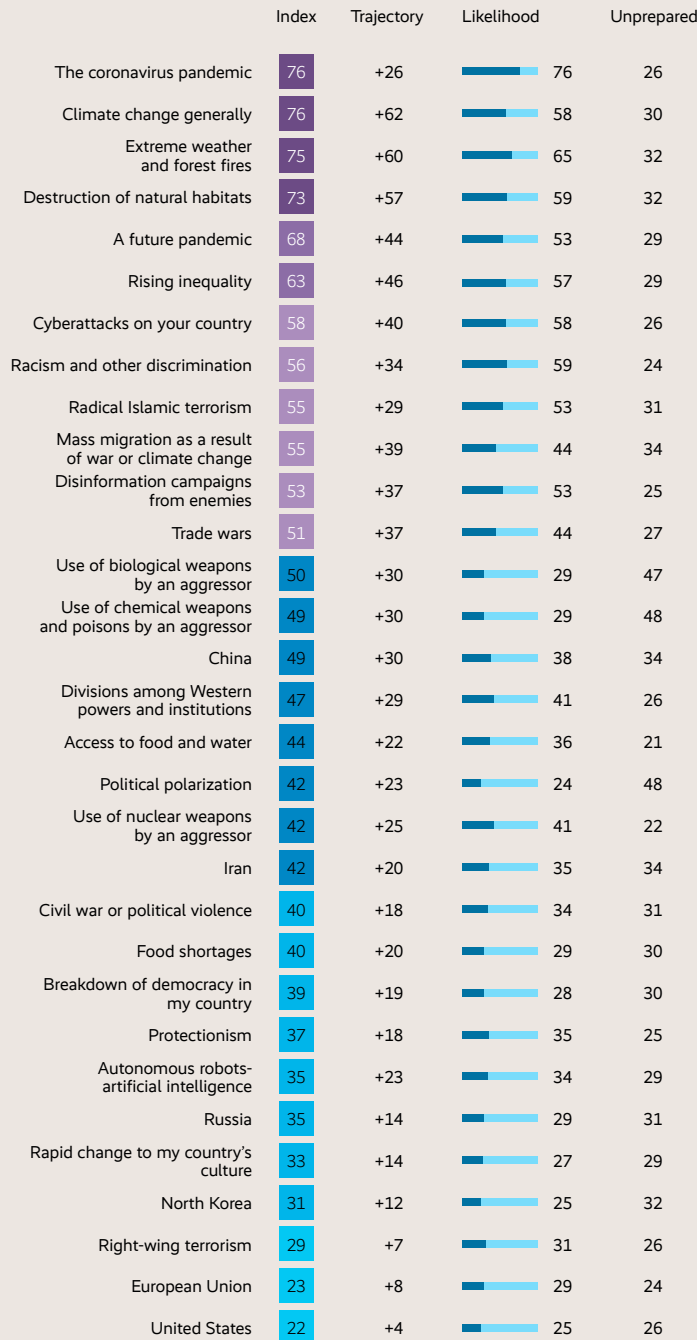
2 Among all countries surveyed, respondents from France are the most concerned by the risk of radical Islamic terrorism. Racism and other forms of discrimination also feature prominently: at 62, France ranks highest in Europe and higher than the US (47). Mass migration as a result of war or climate change is also perceived as a substantial risk by French respondents (65), more so than by any other country surveyed.

3 Strikingly, the occurrence of civil war or political violence is seen as a significant risk by the French, with the highest score in Europe (58) and of all countries surveyed bar Brazil and South Africa (69 each). There is also significantly higher concern among the respondents of France than among those from other European countries about a breakdown of democracy (48) and rapid change to the culture of one's own country (49).

51% of French respondents believe there is a high risk of political violence or civil war in their country.

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

## Italy: The most “risk-aware” country in Europe



1 The top risks of concern to Italian respondents are the coronavirus pandemic, climate change generally, extreme weather and forest fires, the destruction of natural habitats, and a future pandemic. Italians are less concerned by right-wing terrorism and by North Korea.

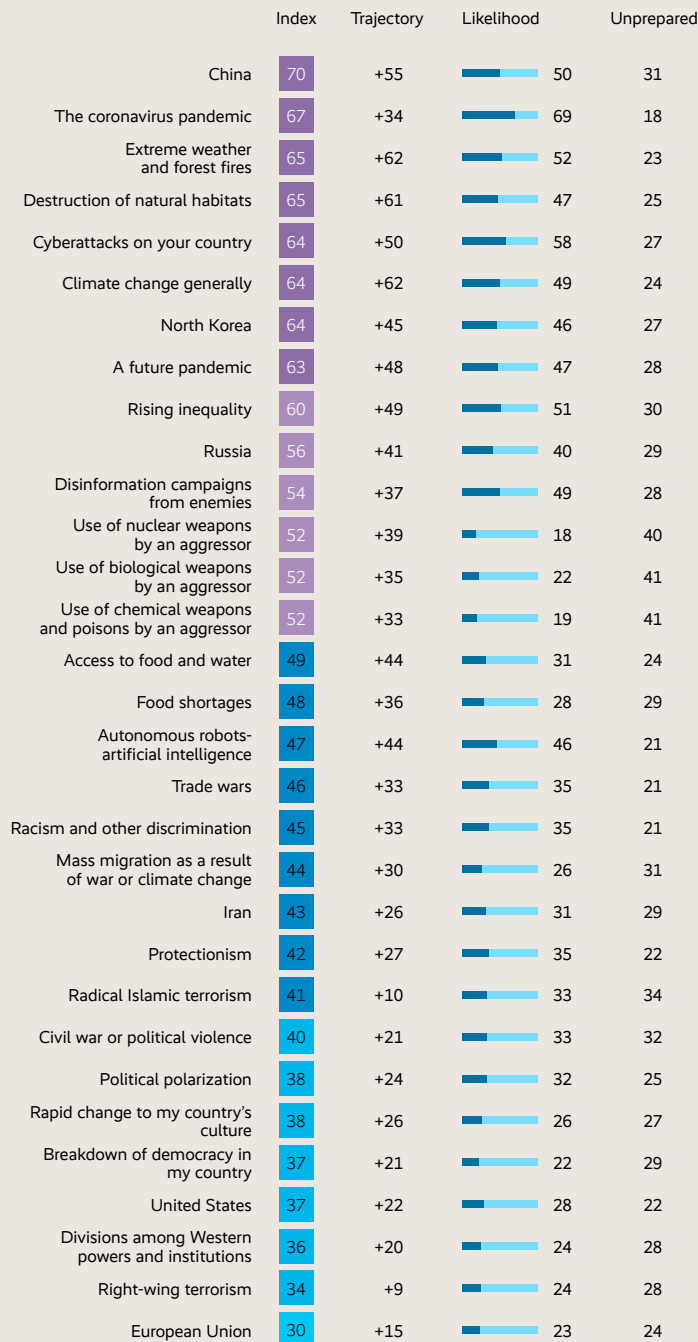
2 Italy is the most “risk-aware” nation in Europe and ranks third behind Brazil and South Africa among those surveyed globally. Respondents from Italy are particularly concerned by environmental issues, with the second highest scores in the world for extreme weather and forest fires and climate change generally.

3 There are topics about which Italian respondents are less concerned than the respondents from other nations. Compared to the citizens from other countries surveyed, Italians are among the least concerned about civil war or political violence as well as about the breakdown of democracy and about right-wing terrorism. They also see Russia as less of a risk than anyone else in Europe. Just like the relatively low concern about China in Germany, this underlines different perceptions of geopolitical risk in Europe.

53% of all respondents from Italy think that another pandemic is likely to happen or become a major risk in the next five years.

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

## Japan: A nation concerned by its neighbors



1 The top risks among Japanese respondents are China, the coronavirus pandemic, the destruction of natural habitats, extreme weather and forest fires, climate change generally, cyberattacks, and North Korea. Respondents from Japan are less concerned by right-wing terrorism and by divisions among Western powers and institutions.

2 Respondents in Japan are concerned by risks in their neighborhood. Japan is the nation that sees China as the biggest risk (70) among all countries surveyed. Japanese respondents also rate the threat from biological and chemical weapons quite highly, along with the use of nuclear weapons (52, second only to Indians when it comes to the perceived risk of nuclear weapon use). Among all countries surveyed, respondents from Japan are those who see North Korea as the biggest risk (64).

3 People from Japan seem unworried in relative terms about risks that dominate responses from other countries, including racism and other forms of discrimination, political polarization, and radical Islamic terrorism.

17% of Japanese respondents believe that Japan is well prepared for climate change.

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

## United Kingdom: Pandemic and climate change on top

	Index	Trajectory	Likelihood	Unprepared
The coronavirus pandemic	62	+4	71	16
Climate change generally	62	+46	55	20
Destruction of natural habitats	60	+44	60	22
A future pandemic	59	+44	53	19
Cyberattacks on your country	59	+43	64	14
Extreme weather and forest fires	56	+41	58	21
Radical Islamic terrorism	53	+31	60	15
China	52	+32	42	25
Disinformation campaigns from enemies	50	+30	60	18
Russia	49	+28	42	24
Racism and other discrimination	48	+21	60	15
Rising inequality	45	+24	51	19
Mass migration as a result of war or climate change	44	+25	41	25
Use of chemical weapons and poisons by an aggressor	43	+24	31	24
Divisions among Western powers and institutions	43	+24	42	18
Trade wars	43	+30	50	17
Use of biological weapons by an aggressor	42	+24	30	25
Right-wing terrorism	42	+22	50	17
Iran	42	+25	39	19
Political polarization	40	+22	43	17
Access to food and water	36	+19	37	12
Civil war or political violence	36	+14	39	18
Rapid change to my country's culture	36	+19	34	21
Protectionism	36	+18	41	15
North Korea	36	+19	34	21
Use of nuclear weapons by an aggressor	35	+21	22	20
Autonomous robots-artificial intelligence	34	+18	36	21
Food shortages	34	+15	34	19
Breakdown of democracy in my country	32	+11	28	22
European Union	22	+15	30	16
United States	19	+1	25	19

1 The top risks that concern respondents from the UK are the coronavirus pandemic, climate change generally, the destruction of natural habitats, a future pandemic, and cyberattacks.

2 The risk profile of respondents from the UK aligns with that of respondents from most other European and Western nations. The British people are slightly more likely to attribute risk to radical Islamic terrorism, but remain behind respondents from Italy, France, and Germany in this assessment. British respondents are not too concerned about a breakdown of democracy (32) or the occurrence of political violence (36). Indeed, globally, they are the respondents least concerned about political violence or civil war apart from the Chinese.

3 Russia and China are both perceived as mid-tier risks by respondents from the UK (49 and 52 respectively). Though the risk posed by China is seen as greater than the one posed by Russia, UK respondents rate the risk posed by Russia higher than the respondents from other countries, falling behind only those from Japan and those from the US.

64% of UK respondents believe that cyberattacks on the UK will happen in the next five years.

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

## United States: Risks from without and within

	Index	Trajectory	Likelihood	Unprepared
Cyberattacks on your country	61	+45	60	21
China	58	+36	52	21
Political polarization	57	+39	56	24
The coronavirus pandemic	55	+6	64	18
Disinformation campaigns from enemies	55	+40	58	21
A future pandemic	54	+30	49	21
Extreme weather and forest fires	54	+36	58	22
Destruction of natural habitats	54	+35	53	21
Breakdown of democracy in my country	52	+32	47	28
Russia	52	+33	49	19
Iran	52	+34	50	18
Civil war or political violence	51	+28	52	23
Rapid change to my country's culture	50	+31	48	24
Climate change generally	48	+32	48	22
North Korea	48	+31	47	16
Use of biological weapons by an aggressor	47	+36	38	16
Racism and other discrimination	47	+23	57	19
Radical Islamic terrorism	46	+24	51	15
Mass migration as a result of war or climate change	46	+26	44	25
Use of chemical weapons and poisons by an aggressor	45	+34	37	16
Use of nuclear weapons by an aggressor	43	+37	38	14
Divisions among Western powers and institutions	43	+24	45	18
Trade wars	42	+18	51	15
Rising inequality	42	+23	49	19
Right-wing terrorism	40	+23	48	18
Access to food and water	40	+22	42	15
Food shortages	40	+19	40	20
Autonomous robots-artificial intelligence	38	+25	42	19
Protectionism	36	+12	44	15
European Union	19	+8	29	12

1 The top risks perceived by US respondents are cyberattacks, China, political polarization, the coronavirus pandemic, and disinformation campaigns from enemies. US respondents are among those least alarmed by risks overall, suggesting an internal view of strength comparable to the one that seems to pervade respondents from Russia and China.

2 China is at the forefront of American risk perceptions: at 58, while lower than in Canada, this is one of the higher scores in the West. Russia is also rated as a high risk (52), to which only Japanese respondents apportion a higher risk. American respondents also see Iran as a major risk (52) – together with the French (52), this is the highest rating among respondents worldwide.

3 Domestically, political polarization is rated highly as a risk. The risk of a breakdown of democracy (52) and of civil war or political violence (51) also looms large in the mind of American respondents. Despite the storming of the US Capitol on January 6, 2021, right-wing terrorism is not perceived as a significant risk (40).

47% of respondents from the US think the risk of political polarization will increase over the next year.

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



## Brazil: The touchpoint of global risk

	Index	Trajectory	Likelihood	Unprepared
The coronavirus pandemic	100	+44	84	49
A future pandemic	89	+54	70	53
Rising inequality	87	+65	74	47
Extreme weather and forest fires	86	+62	74	45
Destruction of natural habitats	86	+62	71	45
Climate change generally	83	+65	73	44
Food shortages	75	+49	60	45
Racism and other discrimination	73	+41	73	37
Political polarization	72	+48	68	36
Disinformation campaigns from enemies	69	+44	66	42
Access to food and water	69	+32	61	38
Civil war or political violence	69	+44	59	45
Breakdown of democracy in my country	67	+40	56	44
Cyberattacks on your country	65	+35	59	48
Trade wars	61	+39	57	38
Divisions among Western powers and institutions	59	+33	54	39
China	56	+27	46	50
Use of biological weapons by an aggressor	55	+23	37	61
Mass migration as a result of war or climate change	55	+33	52	40
Use of chemical weapons and poisons by an aggressor	54	+19	36	60
Protectionism	53	+23	54	37
Rapid change to my country's culture	49	+26	49	39
Autonomous robots-artificial intelligence	48	+26	47	46
Use of nuclear weapons by an aggressor	47	+18	31	61
Right-wing terrorism	45	+15	43	49
United States	42	+20	36	46
Russia	38	+10	34	50
Radical islamic terrorism	37	-6	34	57
North Korea	34	+6	29	51
Iran	33	+4	29	48
European Union	31	+11	30	43

1 Pandemic risks top the list for Brazilian respondents. Across the countries surveyed, respondents from Brazil are the most concerned about the coronavirus pandemic and a future pandemic, with 70 percent of Brazilians believing that a future pandemic is likely in the next five years.

2 These extreme levels of concern also extend to rising inequality and climate change-related issues, including environmental risks, extreme weather, and the destruction of natural habitats. Food shortages, discrimination, and political polarization also rank as high risks: alongside respondents from South Africa, Brazilians are the respondents most worried about civil war or political violence.

3 Respondents from Brazil are less worried by Iran, North Korea, radical Islamic terrorism, or Russia. In line with respondents from nations like the UK and Canada, their risk profile prominently features China.

73% of respondents from Brazil think that income inequality will increase over the next year.

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

## China: An unperturbed country

	Index	Trajectory	Likelihood	Unprepared
United States	44	+28	42	3
Climate change generally	37	+24	39	4
Use of biological weapons by an aggressor	36	+13	23	5
Cyberattacks on your country	36	+20	45	4
Use of nuclear weapons by an aggressor	35	+20	22	4
The coronavirus pandemic	35	-16	59	4
Disinformation campaigns from enemies	34	+18	45	5
Extreme weather and forest fires	34	+8	37	4
Destruction of natural habitats	34	+8	35	4
Trade wars	34	+20	44	4
Use of chemical weapons and poisons by an aggressor	33	+6	22	5
Autonomous robots-artificial intelligence	31	+20	38	5
Access to food and water	30	+10	31	3
Protectionism	30	+12	39	6
Rising inequality	30	+9	33	6
A future pandemic	29	-17	50	5
European Union	28	+12	29	5
Divisions among Western powers and institutions	25	+5	31	6
Right-wing terrorism	24	-9	32	6
Radical islamic terrorism	24	-11	31	7
Racism and other discrimination	22	-4	30	6
Rapid change to my country's culture	22	+6	27	5
Political polarization	21	-3	23	6
Mass migration as a result of war or climate change	21	-8	23	7
Food shortages	20	-9	23	5
Civil war or political violence	18	-17	24	7
Russia	15	-9	21	9
Breakdown of democracy in my country	12	23	16	10
Iran	12	-12	23	11
North Korea	10	-17	21	10

1 The top risks perceived in China are the US, climate change generally, the use of biological weapons by an aggressor, and cyberattacks. The Chinese are less worried about North Korea, Iran, and Russia.

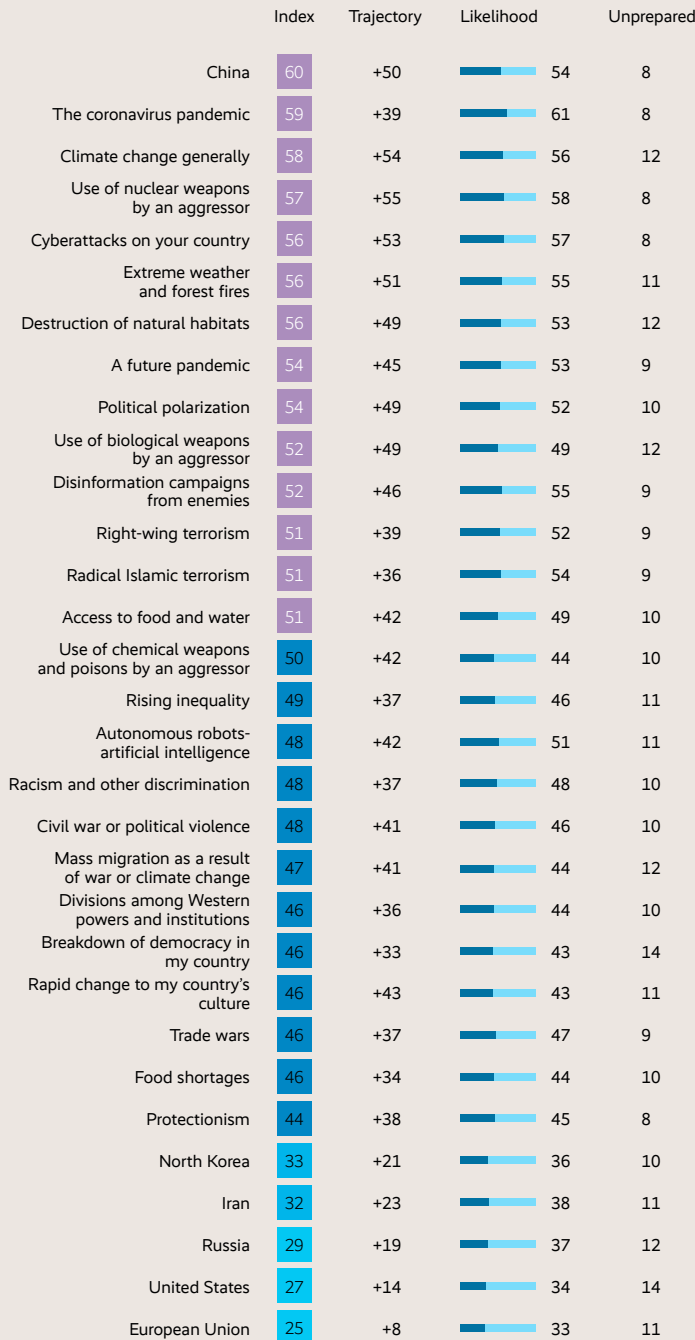
2 Overall, the level at which risks are perceived is lower in China than in the rest of the world – possibly a sign of the confidence of the Chinese people in the strength of their country. While respondents from other countries view China and Russia as risks, respondents from China see the US and the EU as the countries or blocs that pose the biggest geopolitical risks. Where risks are perceived, the Chinese public strongly thinks their country is prepared for them.

3 Compared to most other nations, Chinese respondents view the risk of a future pandemic with confidence. They rate this risk as relatively low (29), think that it is declining, and assume that China is prepared for such an event. The same is true of Chinese risk perception regarding the current coronavirus pandemic.

38% of respondents from China think that AI and autonomous robots are likely to become a major risk in the next five years.

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

## India: Traditional aggressor risks at the forefront



1 The top risks perceived by Indians are China, the coronavirus pandemic, climate change generally, and the use of nuclear weapons by an aggressor. Indians are less worried by Russia, Iran, and North Korea. Respondents from India are more concerned about the risk from China (60) than others – with higher scores only found among the respondents from South Africa and Japan.

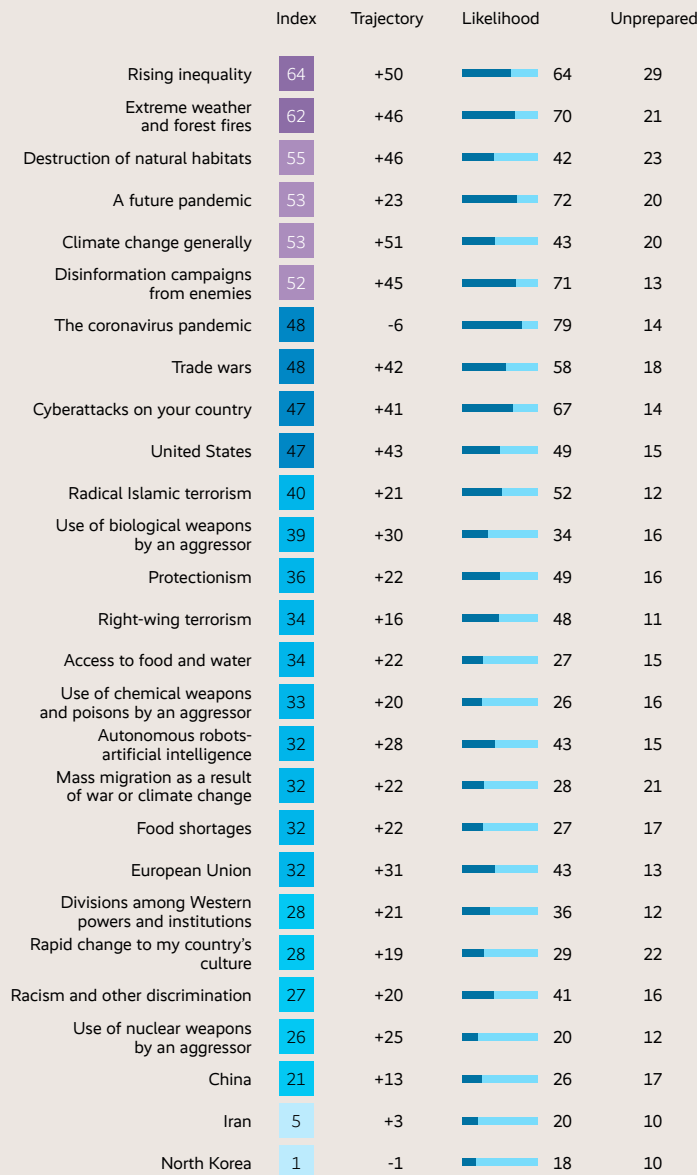
2 Respondents from India are more concerned by traditional aggressor risks than those from other countries. For example, they are most worried about the use of nuclear weapons by an aggressor (57), likely reflecting regional security dynamics. They are also at the upper end of those who view biological warfare as a risk. This is matched, however, by Indian concern about new methods of aggression such as cyberattacks (56).

3 While respondents from most countries take a relatively similar view of Russia and China in terms of risk, among Indians, these perceptions are not aligned. While they see China as a high risk (60), respondents from India perceive the risk from Russia as relatively low (29) – the second-lowest threat perception in the surveyed world.

78% of respondents from India think that China poses a severe risk to the country – it is the greatest risk perceived by Indians.

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

## Russia: Mirror image of the United States



1 The top risks worrying respondents from Russia are rising inequality, extreme weather and forest fires, the destruction of natural habitats, climate change generally, and a future pandemic. 56 percent of Russians think that the risk posed by inequality is going to increase in the next year while only 6 percent see it decreasing. That said, the absolute level of risk perceived by Russian respondents is one of the lowest alongside the US and China.

2 Russian responses are a mirror image to those from the US on the issue of where external threats emanate from. Respondents from Russia see China as well as Iran and North Korea as minor risks, while viewing the US as a major risk. Russian respondents award the EU with a comparatively low absolute risk score (32). Yet, among all countries surveyed, Russian respondents are second only to respondents from South Africa (39) in the size of the risk ascribed to the EU.

3 Respondents from Russia are also less concerned about the risk of chemical weapons and biological weapons attacks. Among Russians, the perceived threat of an attack from nuclear weapons is the lowest in the world (26).

56% of Russian respondents think that inequality will increase as a risk over the next year – the greatest risk they perceive.

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

## South Africa: Risks on all sides

	Index	Trajectory	Likelihood	Unprepared
Racism and other discrimination	82	+57	74	35
Food shortages	79	+55	68	38
Rising inequality	75	+78	70	39
The coronavirus pandemic	75	+24	77	24
Destruction of natural habitats	74	+55	65	35
Access to food and water	73	+47	68	34
Extreme weather and forest fires	72	+58	70	32
Political polarisation	72	+54	66	32
Climate change generally	71	+56	66	33
A future pandemic	70	+46	62	31
Civil war or political violence	69	+48	62	37
Breakdown of democracy in my country	69	+49	59	37
China	68	+38	58	44
Disinformation campaigns from enemies	61	+36	59	36
Rapid change to my country's culture	61	+45	57	34
Cyberattacks on your country	60	+35	56	34
Mass migration as a result of war or climate change	60	+35	51	44
Use of chemical weapons and poisons by an aggressor	58	+22	42	50
Divisions among Western powers and institutions	58	+35	52	34
Use of biological weapons by an aggressor	55	+22	41	53
Protectionism	55	+29	51	27
Trade wars	54	+26	52	32
Use of nuclear weapons by an aggressor	50	+19	52	32
Russia	48	+16	44	43
United States	48	+25	43	40
Right-wing terrorism	43	+7	40	34
Autonomous robots-artificial intelligence	43	+22	46	38
Radical Islamic terrorism	42	+5	43	38
European Union	39	+16	37	38
Iran	37	+3	37	42
North Korea	37	+6	33	44

1 The top risks mentioned by South African respondents are racism and other forms of discrimination – both of which are ranked highest among all countries surveyed – as well as food shortages, rising inequality, the coronavirus pandemic, and the destruction of natural habitats.

2 South Africa is the second most “risk-aware” nation among the 12 nations surveyed, after Brazil. Respondents from the country see the breakdown of democracy, along with protectionism and rapid change to the culture of one’s own country, as bigger risks than the respondents from other countries.

3 Strikingly, South African respondents do not perceive huge differences in the risk posed by China, Russia, and the US. They see China as a risk (68), with the second highest ranking globally behind Japan. They also view Russia as a risk (48), with greater risk perceptions only found among respondents from Japan, the UK, and the US. And they view the US as a bigger risk (48) than respondents from other countries do, including the Russians and the Chinese.

59% of South African respondents think that the risk of a breakdown of democracy is likely in the next five years.

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

## Risk by Risk: Countries

The scope for cooperation among countries and the shape of competition among them depends on how societies perceive each other. With the Munich Security Index highlighting differences in who societies perceive as risks, observers might have to brace for highly complex patterns of competition and cooperation between the twelve countries surveyed.

When it comes to countries' assessments of each other as risks, only one view seems to be widely shared: in all countries surveyed, with the exception of Russia, respondents perceive China as a high risk. Yet, the gravity of this perception still varies considerably, including within Europe and the traditional West. On the threat posed by other countries and groupings in the world – from Russia, the US, the EU, North Korea, and Iran – views are equally diverse, both inside and beyond the traditional West. For instance, while for respondents from Russia and China risks seem to only come from the US, respondents from South Africa worry about several fronts, including about China, Russia, and the US.

In the survey, participants were also confronted with a set of 33 countries and asked to evaluate them as [allies or threats](#). The results show a particularly strong overlap in threat perceptions by respondents from the UK, the US, Canada, and Japan – with the overlap especially strong between respondents from the UK and the US. While US and European respondents seem to generally agree in their perceptions of each other as allies and of China and Russia as threats, there are distinctly different views, too. For example, respondents from Italy have a much more positive view on Russia than respondents from Canada, the US, and other European peers. Clear differences among the transatlantic partners are also visible on other fronts, with respondents from France and Germany expressing much harsher views of Turkey and Saudi Arabia than their American counterparts.

Threat perceptions also reflect regional dynamics. For example, Japanese respondents see Taiwan as a strong ally, while they view North Korea and China as major threats to their country. Russian respondents, in turn, see Ukraine as a significant threat. And while respondents from South Africa and Brazil see themselves closer to the West than to Russia and China, their perceptions of Moscow and Beijing are much more ambivalent than those expressed in most Western states.



Citizens' perceptions of other countries, share saying country is an ally minus share saying country is a threat, 2021, percent

For each country/jurisdiction below please say whether you think they pose a threat or are an ally to your country or neither

	Canada	Italy	Finland	France	Germany	UK	US	Norway	Greece	Japan	South Africa	Poland	Brazil	Argentina	India	Mexico	Hungary	Peru	Estonia	Taiwan	Israel	South Korea	Ukraine	Belarus	Venezuela	Colombia	Turkey	Saudi Arabia	Pakistan	Russia	China	Iran	North Korea
Canada	42	41	41	40	46	40	41	36	35	27	33	22	26	23	34	28	24	18	24	17	27	20	10	4	12	8	-14	-3	-27	-32	-31	-41	
Germany	39	39	38	42	29	27	40	34	25	10	22	1	9	6	7	11	6	26	6	14	12	8	-14	-7	-5	-21	-24	-21	-20	-27	-38	-39	
France	54	56	52	54	40	45	50	46	32	25	31	18	23	16	21	28	26	30	17	19	23	16	-1	7	11	-31	-16	-23	-7	-18	-34	-36	
Italy	39	32	33	34	32	38	35	34	30	15	23	20	23	5	15	19	16	21	9	19	15	12	8	9	6	-12	-5	-15	14	-1	-22	-21	
Japan	37	39	34	34	36	42	28	22	14	25	22	18	25	17	16	18	16	17	16	47	1	-24	11	10	11	7	27	14	3	-29	-42	-9	-49
UK	49	46	48	39	43	43	48	44	36	33	41	23	10	28	26	34	25	30	23	17	24	21	14	12	9	13	-1	5	-27	-28	-31	-41	
US	41	36	36	35	32	38	36	35	30	25	29	17	19	20	22	20	20	13	25	26	28	13	10	-2	7	7	-3	-7	-25	-28	-30	-31	
Brazil	18	18	3	4	7	15	29	3	5	17	9	-2	14	4	12	-4	12	12	-11	-11	10	-2	-11	-14	-16	6	-9	-24	-7	-4	-25	-26	
China	2	21	19	18	23	1	-16	17	24	-2	31	19	25	27	-10	24	20	21	20	13	8	24	34	29	19	17	24	44	43		26	31	
India	30	32	29	32	29	35	32	25	27	30	31	29	27		26	24	25	21	23	27	20	27	25	23	29	17	25	-2	30	1	19	12	
Russia	-15	11	9	-6	-2	-34	-53	-5	19	-13	14	-37	23	22	35	19	8	19	-32	16	4	4	-53	52	30	9	-9	-6	-12		20	-1	10
South Africa	21	17	17	17	24	29	32	17	13	14	10	26	21	29	14	13	15	3	14	13	11	5	13	15	10	18	14	4	12	14	-1	-3	



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

## China

A majority of all respondents (64 percent) see China as a major risk. This view is strongest among respondents in India (78 percent), South Africa (74 percent), the US, and Japan (both 69 percent). Only citizens in Russia (43 percent) view the threat posed by China as significantly below the average. Among the transatlantic partners, evaluations differ, too: for instance, respondents from Canada, the UK, and the US are much more concerned about the threat posed by China (with overall risk scores of 60, 52, and 58) than respondents from Italy, Germany, or France (49, 45, and 49). Across all countries surveyed, 44 percent of respondents believe that the threat posed by China will increase in the next year, while 47 percent believe it will stay the same. Majorities in India and Japan (both 63) have the highest level of concern. Overall, 30 percent of respondents believe that their country is unprepared for this threat. In this regard, respondents from Russia, the US, and India are somewhat more optimistic about their preparedness.

## Russia

More than half of the respondents in all countries surveyed see Russia as a major risk, albeit markedly less collectively than those who name China (64 percent). This perception is strongest in the US and the UK, at 63 and 61 percent respectively. China (41 percent) and Italy (46 percent) are the only countries surveyed that score below the global average when it comes to concern about Russia. One in three respondents overall (34 percent) expects that the risk from Russia will increase over the next year – in China, at only 20 percent, this share is palpably lower. Respondents from Japan, the US, and India are more worried than others by a growing risk from Russia. US respondents have the highest concern that the threat posed by Russia will increase during the next year (27 percent compared to the average of 17 percent). Around half of Chinese respondents expect the risk from Russia to remain stable – the remainder are more likely to see it decrease (29 percent) rather than increase (20 percent).

## Iran

Slightly fewer than half of all respondents (47 percent) view Iran as a major risk – but this perception is significantly stronger in the US (61 percent), France (57 percent), and Italy (54 percent). Iran is not seen to pose a significant risk by respondents in Russia and China. Looking into the next year, expectations that the threat posed by Iran will increase are significantly higher among US respondents (29 percent) than among respondents from any other country surveyed (average of 16 percent). Relative majorities in the US (44 percent), France, and India (both 43 percent) think that the risk from Iran has increased in the past year.

## United States

Among Chinese respondents, 70 percent think that the gravity of the risk posed by the US is high – almost exactly the same proportion of US respondents who say that the gravity of the risk from China is high (69). Similar risk perceptions are also found between the US and Russia: 66 percent of Russian respondents view the US as a significant risk, compared to 63 percent of US respondents who say the same about Russia. The countries whose respondents are least likely to see the US as a severe risk are France (33 percent), Italy (38), the UK (41), and Germany (43), who all score well below the average of 50 that pertains among all countries surveyed. Around one in three respondents (32 percent) across all countries surveyed expects the threat posed by the US to increase, with significantly higher proportions among respondents from Russia (51 percent) and China (49 percent). Chinese respondents are the most confident that their country is prepared for this risk (79 percent), followed by respondents from India (59 percent) and Russia (56 percent).

## European Union

As a risk, the EU scores significantly lower than the US across all countries surveyed, reaching the highest percentage in China (53 percent, compared to an average of 41 percent). Most respondents (58 percent) believe that the level of threat posed by the EU will remain the same over the next year, with 26 percent believing that it will increase. Citizens in Russia and China, at 40 percent and 36 percent respectively, are most likely to believe that the level of threat posed by the EU will increase – with Chinese respondents feeling similarly prepared for that type of threat as they feel for the threat posed by the US (only 5 percent feel unprepared).

## North Korea

While a majority of respondents (56 percent) across the twelve countries do not expect the risk emanating from North Korea to change in the coming year, 30 percent believe that it will increase. This view is particularly strong in Japan (53 percent), India, and the US (both 42 percent), and is lowest in Russia and China, at 11 and 17 percent respectively. Respondents from Japan (at 62 percent) and the US (at 59 percent) are most concerned about the threat posed by North Korea, while respondent from Russia and China, at 26 and 32 percent respectively, are far less concerned. The respondents from most countries surveyed feel reasonably well prepared to deal with any risk from North Korea. Respondents from India, Russia, China, and the US are those who feel best prepared.

## Risk by Risk: Issues

Cooperation on global security threats largely depends on the extent to which other countries hold the same risk assessment. Yet, the only areas where a universal consensus seems to emerge among the respondents from the twelve countries surveyed are climate change and the coronavirus pandemic. Both issues, alongside climate-related risks like extreme weather events and the destruction of natural habitats, are viewed as considerable risks by respondents everywhere in the world. On other sources of risk, however, there is little common ground among the countries surveyed. Interestingly, more traditional sources of risk like the use of nuclear weapons by an aggressor do not seem to generate as much concern among global respondents – with respondents from India being a prominent exception – when compared to more recent and diffuse types of risk, such as those posed by cyberattacks and disinformation campaigns. Respondents from some Western countries – in particular from France, Italy, and the US – also see a considerable risk of civil war or political violence and of the breakdown of democracy in their country.

### Current and future pandemics

Respondents' perceptions of the risk posed by the coronavirus pandemic largely mirror how severely the virus has hit their respective countries. For instance, respondents from Brazil (89 percent), South Africa (77 percent), and Italy (77 percent) express great concern about the risk posed by the pandemic, while respondents from Russia (55 percent) and China (56 percent) seem somewhat less worried. Views that the risk of future pandemics has increased are strongest among respondents from Brazil (67), South Africa (62), and India (61), and are weakest in China (28). Concerns about the impact of a future pandemic are highest in the countries that are also most worried about the risk posed by Covid-19, namely Brazil (87 percent), Italy (74 percent), South Africa (72 percent), and India (72 percent). By contrast, concerns are lowest in China (51 percent) and Russia (59 percent). Perceptions of preparedness seem to affect respondents' concerns: respondents in China, for instance, who are least concerned by the current pandemic, are also the ones who feel best prepared for future pandemics. At the other end of the scale, respondents from Brazil worry most about the current Covid-19 pandemic – and more than half (53 percent) of them feel their country is unprepared for an outbreak that may occur in the future.

## Climate change and extreme weather

Among those surveyed, climate change is seen as a significant risk. 58 percent of respondents across all countries surveyed expect the risk of climate change to increase, almost twice the percentage of those who expect it to stay the same (33 percent). Almost two in three respondents (64 percent) across all G7 and BRICS countries believe that climate change could have a very significant impact on the country that they live in. These figures are highest in Brazil (80 percent), Italy, and South Africa (71 percent each), and are lowest in the US (53 percent) and China (57 percent). When it comes to climate-related risks, a majority (57 percent) of all respondents believe that the risk of extreme weather events and forest fires will increase in the next year. At 55 percent, respondents from Brazil are significantly more likely than those from other countries surveyed to perceive extreme weather events as an immediate risk, while they also feel less prepared than other respondents in the face of that threat: 45 percent of Brazilians surveyed say their country is unprepared, compared to an average of 24 percent in the other countries who gave the same answer.

## Nuclear, biological, and chemical weapons

Respondents from nuclear-weapon states – China, India, Russia, the US, and the UK – believe their countries are best prepared to deal with the threat posed by nuclear weapons. In fact, respondents from nuclear-weapon states feel best prepared to deal with the threat posed by any type of weapon, be they nuclear, biological, or chemical. At the same time, regional security dynamics seem to affect respondents' risk perceptions. For instance, respondents from India are significantly more likely than those from any other country surveyed to feel threatened by nuclear weapons. At 35 percent, more than three times the surveyed average (11 percent), respondents from India consider the use of nuclear weapons by an aggressor likely and expect the likelihood of an aggressor using nuclear weapons to increase in the next year (64 percent). Majorities in all other countries expect that the risk will stay the same – with the exception of China, where this is believed by only 45 percent of respondents. When it comes to the impact of the use of chemical weapons by an aggressor, South Africa (20 percent) and India (18 percent) are the countries where the highest share of respondents believe that this threat is very likely.

## Cyberattacks, autonomous robots, and AI

Overall, modern weapon systems, cyber threats in particular, seem to provoke relatively strong concern among global respondents. Overall, almost two in five respondents believe that a cyberattack on their country is likely in roughly the next year. Chinese respondents, at 24 percent, view this risk as least likely. Respondents from China (76 percent), along with those from India (68 percent) and Russia (54 percent), are also significantly more likely than the surveyed average (38 percent) to believe that their country is well prepared to deal with cyber threats. Majorities in a number of countries believe that the risk of a cyberattack has increased, with concern greatest in India (65 percent), France (57 percent), and Japan (57 percent). Indian respondents are also those most concerned about the risk posed by autonomous robots and AI (61 percent). Overall, 39 percent of all respondents expect the risk posed by autonomous robots and AI to increase in the next year.

## Terrorism

Across all countries surveyed, radical Islamic terrorism is seen as a greater risk than right-wing terrorism – although one in three respondents (34 percent) expects the threat from right-wing terrorism to increase in the next year. France is the country where respondents show the greatest concern about radical Islamic terrorism, scoring highest across the dimensions of perceived gravity of the threat (75 percent), perceived increase of the threat (57 percent), and perceived likelihood of its occurrence (50 percent). German respondents also score above average on the perceived gravity of this risk (65 percent), the perception that it is increasing (46 percent), and the perceived likelihood of its occurrence (44). By contrast, Germans are among the most worried about right-wing terrorism. 40 percent say that is likely, the largest percentage of any country surveyed. At 30 percent, citizens in the US also score significantly above the overall average (21 percent) for the perceived risk of right-wing terrorism.

## Disinformation

More than half of those surveyed across the G7 and BRICS countries (53 percent) view disinformation campaigns as a significant risk. Respondents from Brazil (68 percent), India (65 percent), and South Africa (65 percent) are among the most concerned in this regard. In various parts of the world, respondents fear that the risk of disinformation campaigns will increase over the next year: a considerable share of respondents in the US (38 percent), Canada (40 percent), the UK (40 percent), Brazil (48 percent), and Russia (52 percent) consider disinformation likely in the next twelve months.



## **Access to food and water**

Respondents in South Africa, a country that has experienced severe water shortages in recent years, are joined by those from Brazil as the most concerned (at 78 percent) about the impact of the risk posed by limited access to food and water. Across all countries surveyed, the average is at 59 percent. At the same time, respondents from both Brazil (38 percent) and South Africa (34 percent) also believe that their countries are not well prepared to deal with this type of risk.

## **Political polarization**

While half of all respondents (49 percent) expect the risk of further political polarization to remain stable over the next year, a majority of respondents express concerns about this type of risk. Respondents from South Africa (62 percent) are the most concerned, followed by respondents from India (60 percent) and Brazil (57 percent). US respondents are also scoring well above the global average (47 percent set against a global average of 41 percent). The two countries with the largest shares of respondents saying that the risk of political polarization is imminent within the next few months are Brazil (27) and the US (25).

## **Mass migration**

42 percent of all respondents think that mass migration as a result of war or climate change will likely increase over the next year, with a slightly higher share of respondents (46 percent) expecting the risk to stay the same. The share of respondents who see mass migration as a high risk is greatest in India (58 percent) and France (55 percent), with Italy (47 percent) and Germany (46 percent) also scoring above the overall average. Respondents from three European countries – France (63 percent), Italy, and Germany (both 56 percent) – all rank the gravity of this risk higher than the average respondent, yet lower than respondents from South Africa (67 percent). In France and Germany, as well as in Italy, respondents feel least prepared for shouldering this risk.

## **Divisions among Western powers and institutions**

Although around half of all respondents (49 percent) see divisions among Western powers and institutions as a high risk, feelings of preparedness clearly differ. In Germany (24 percent), France (24 percent), and Italy (26 percent), respondents score above average when it comes to feeling unprepared.

## **Racism and discrimination**

Racism and discrimination are seen as significant risks by half (51 percent) of all respondents, with the highest scores found in South Africa (73 percent) and Brazil (68 percent). Respondents in France (at 57 percent) and Italy (at 53 percent) also rank the risk higher than the global average. In all countries surveyed, respondents think the risk will likely increase.

<b>Civil war or political violence</b>	In South Africa (59 percent), Brazil (54 percent), France (45 percent), and the US (42 percent), the share of respondents who think that the risk of civil war or political violence will increase over the next year is higher than the overall average. At the other end of the range, in China (23 percent), the UK (25 percent), Canada (26 percent), and Germany (29 percent), less than a third of people think that the risk will increase over the next year.
<b>Rapid change to one's country's culture</b>	Half of those surveyed (50 percent) expect that the risk of rapid change to their country's culture will remain the same over the next year, compared to 38 percent of respondents who think that the risk will increase. The proportion saying it will increase is highest in India (59 percent), South Africa (54 percent), and the US (42 percent). Respondents from India (61 percent), South Africa (60 percent), France (59 percent), and Brazil (57 percent) are above the overall average (50 percent) when rating the gravity of this risk, while respondents from Japan are significantly below (36 percent).
<b>Trade wars and protectionism</b>	Although respondents in Russia and China score higher on the perceived risk of trade wars than those from most other countries surveyed, they also feel better prepared than others if trade wars were to occur. Overall, protectionism emerges as less of a concern among global respondents than trade wars. However, the level of concern about the imminent likelihood of this risk and about one's country's preparedness in the face of this risk is comparable to the level of concern about trade wars.
<b>Rising inequality</b>	Half of the respondents across all twelve countries surveyed believe that rising inequality has become a bigger risk over the past twelve months. This perception is strongest among respondents from Brazil (73 percent), South Africa (67 percent), Japan (58 percent), and Russia (56 percent), compared to significantly lower risk perceptions among respondents from China (34 percent), the UK (35 percent), Canada (36 percent), and the US (37 percent). Brazil and South Africa, at 58 and 52 percent respectively, are by far the countries with the highest concerns about the impact of inequality to be felt over the next year or so – well above the overall average (35 percent).
<b>Food shortages</b>	Concerns about food shortages are significantly higher in Brazil (80 percent) and South Africa (79 percent) as well as India (66 percent) than among respondents from other countries surveyed. In the same three countries, relative majorities think the risk will increase in the next year.

## Key Demographic Differences

Global decision-makers that seek to jointly tackle urgent security threats do not only have to build bridges between states, whose societies often do not agree on what or who poses a risk; they also have to bridge divides within countries themselves, as the risk perceptions of respondents within one and the same country may vary considerably with respondents' demographic characteristics. While some respondents may perceive their nation to be under siege, others may well be at ease with the world around them. The Munich Security Index accounts for the way in which age, political affiliation, gender, education, and income affects respondents' risk perceptions.

### Age

Significant age cleavages are discernible on a number of issues. Respondents aged 65 or older are generally more risk-aware than respondents in younger age groups. They also express more concern about the risks posed by other countries. For instance, in the UK, Germany, Canada, and the US, the perceived threat posed by China and Russia strongly varies with the age of the respondents: older voters are much more likely to see the two countries as a risk. A similar pattern holds true for the perception of terrorism: in Germany, only 46 percent of respondents aged 18-24 say that radical Islamic terrorism poses a major risk to their country – compared to 67 percent among those aged 65 or older. By contrast, younger people are slightly more likely to perceive racism and other forms of discrimination as risks. Climate change, often portrayed as a concern of the young, older people are in fact somewhat more likely to rate as a risk (67 compared to 62 percent).

### Political affiliation

Even on issues that seem to be characterized by broad agreement among states, societies may be deeply divided. While the overall index results suggest that the environment is an issue that commands broad global consensus, in some countries, respondents with different party affiliations strongly disagree about the extent of this risk. For example, only 36 percent of Canadian Conservative Party voters say that climate change poses a major risk to their country. Among Canada's Liberal Party voters, 64 percent have that opinion. In other countries, partisan differences on environmental issues are less pronounced. In France, for example, supporters of Emmanuel Macron's La République En Marche and supporters of Marine Le Pen's Rassemblement National seem to agree on the risk facing the environment. On other issues, however, they are sharply at odds: Le Pen voters see a huge risk of the breakdown of democracy, political violence, mass migration, and

radical Islamic terrorism – conjuring up a nation under siege. Voters of Macron, by contrast, seem much less worried about each of these threats. Similarly, voters of Le Pen see Russia as an ally, while supporters of all other French parties view Russia mostly as a threat.

### **Education**

Differences in education levels do not seem to have a strong impact on perceptions of risk. For instance, higher-educated people are only slightly more likely to perceive a risk from cyberattacks (60 percent to 54 percent for lower education) or from disinformation campaigns (54 to 50). Respondents with lower levels of education levels, however, seem more likely than degree-holders to name racism and discrimination (57 to 48) as well as mass migration (53 to 44) as risks.

### **Gender**

Overall, women appear to be somewhat more concerned about risk than men. For example, women are more likely than men to perceive the coronavirus pandemic as a risk (68 percent compared to 61 percent), to call extreme weather and forest fires a risk (66 to 60), or to express concern about the risk of climate change (65 to 60). They are also more likely to see racism and discrimination as risks (55 to 47).

### **Income**

Respondents with lower incomes (in the bottom tertile of the income distribution) tend to perceive greater risk than those with higher incomes. For example, lower-income respondents are more likely to see the pandemic as a great risk (66 percent to 60 percent) and to perceive the risk of a future pandemic (63 to 58). Racism and discrimination is a much greater concern for lower-income respondents, who rate it at 53 compared to 42 among higher-income earners. When it comes to the threat posed by other countries, lower-income respondents are more concerned about China (52 to 46) and Iran (44 to 34), but less concerned about Russia (43 to 47).

## Key Points

- ① Countries' perceptions of each other shape competition and cooperation among them. The prospect of jointly addressing threats, from climate change to future pandemics, depends on the extent to which risk assessments are shared.
- ② The MSC and Kekst CNC together have built a new dataset, the Munich Security Index, to explore how citizens in the G7 and BRICS countries view risk in 2021. The index is based on a survey of 12,000 people globally and combines five metrics of risk.
- ③ The overall picture painted by the index is one of fragmentation. Risk perceptions among the twelve countries surveyed are highly diverse. And even inside the countries examined, risk perceptions often vary with demographic characteristics.
- ④ If there is something akin to a global consensus on risk, it revolves around climate and the threats facing the environment. Moreover, the current and future pandemics are perceived as top risks among global respondents.
- ⑤ When it comes to the extent to which respondents see other countries as risks, only one assessment seems to be widely shared: with the exception of Russia, respondents in all countries surveyed apportion a high risk to China.

All illustrations and data in this appendix are based on the survey conducted by Kekst CNC. For the detailed method underpinning the index, see page 6. Possible deviations from a total of 100 percent in visualized data result from rounding.

## Notes

### Country profiles

The likelihood figures were calculated by adding together the 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.” The trajectory figures were calculated by subtracting the percentage of respondents saying a risk will increase in the next year minus the percentage saying it will decrease in the next year in answer to the question “Please say for each of the following whether you think the risk posed in your country will increase, decrease, or stay the same in the next year.” The preparedness figures refer to the proportion of respondents who rated their country’s preparedness as less than 6 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.”

### Citizens’ perceptions of other countries, share saying country is an ally minus share saying country is a threat, 2021, percent

Data and illustration provided to the Munich Security Conference by Kekst CNC. In answer to the question “For each country/jurisdiction below please say whether you think they pose a threat or are an ally to your country or neither [0-10, where 0 is ‘threat,’ 5 is neither and 10 is ‘ally’].” The scores run from a potential -100 (if 100 percent of a population said that x was a threat) to +100 (if 100 percent of a population said that x was an ally).

## Image Sources

### MSC/Kuhlmann

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With the Munich Security Index, the MSC and Kekst CNC together have built a new dataset to answer core questions that help understand citizens' risk perceptions. By combining five metrics – from the severity of a risk to its likelihood of developing, from the imminence of a risk to whether it is looming larger or receding – the index, underpinned by a survey of 12,000 people globally, provides an in-depth view of how G7 and BRICS nations view risk in 2021. This appendix provides an overview of key survey results and additional analyses and serves as a companion to the Munich Security Report 2021 “Between States of Matter – Competition and Cooperation” (DOI: <https://doi.org/10.47342/CYPE1056>) .

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