



Munich Security Index 2025

KEKST CNC EXECUTIVE SUMMARY





Navigating Global Dynamics:

Key Insights from the 2025 Munich Security Index

Since 2021, the Munich Security Conference, in partnership with strategic advisory firm Kekst CNC, has produced the Munich Security Index (MSI) to shed light on perceptions of global risks. In its latest edition, the MSI examined responses from 11,000 individuals to identify the threats that are top of mind across the G7 and BICS nations.

In today's volatile geopolitical climate, businesses have to navigate a complex tapestry of public opinion. The MSI reveals stark contrasts in optimism between the G7 countries and the BICS nations (Brazil, India, China, and South Africa), underscoring the need for tailored communication strategies that resonate with diverse audiences.

This year, we observed that environmental issues, particularly climate change and extreme weather, dominate global concerns. Moreover, shifting perceptions of major powers such as China and the United States add complexity.

The 2025 MSI highlights five key themes crucial for businesses trying to navigate these dynamics effectively. As global perceptions continue to evolve, these insights help companies operating across markets and jurisdictions to understand and thrive in an ever-changing and divergent landscape.



1	DIVERGENCE IN OPTIMISM BETWEEN THE G7 AND BICS	PAGE 4
2	CENTRALITY OF ENVIRONMENTAL RISKS	6
3	CHANGING PERCEPTIONS ON CHINA	8
4	MORE WARINESS OF THE UNITED STATES	9
5	INCREASINGLY ANXIOUS GERMANS	11

1



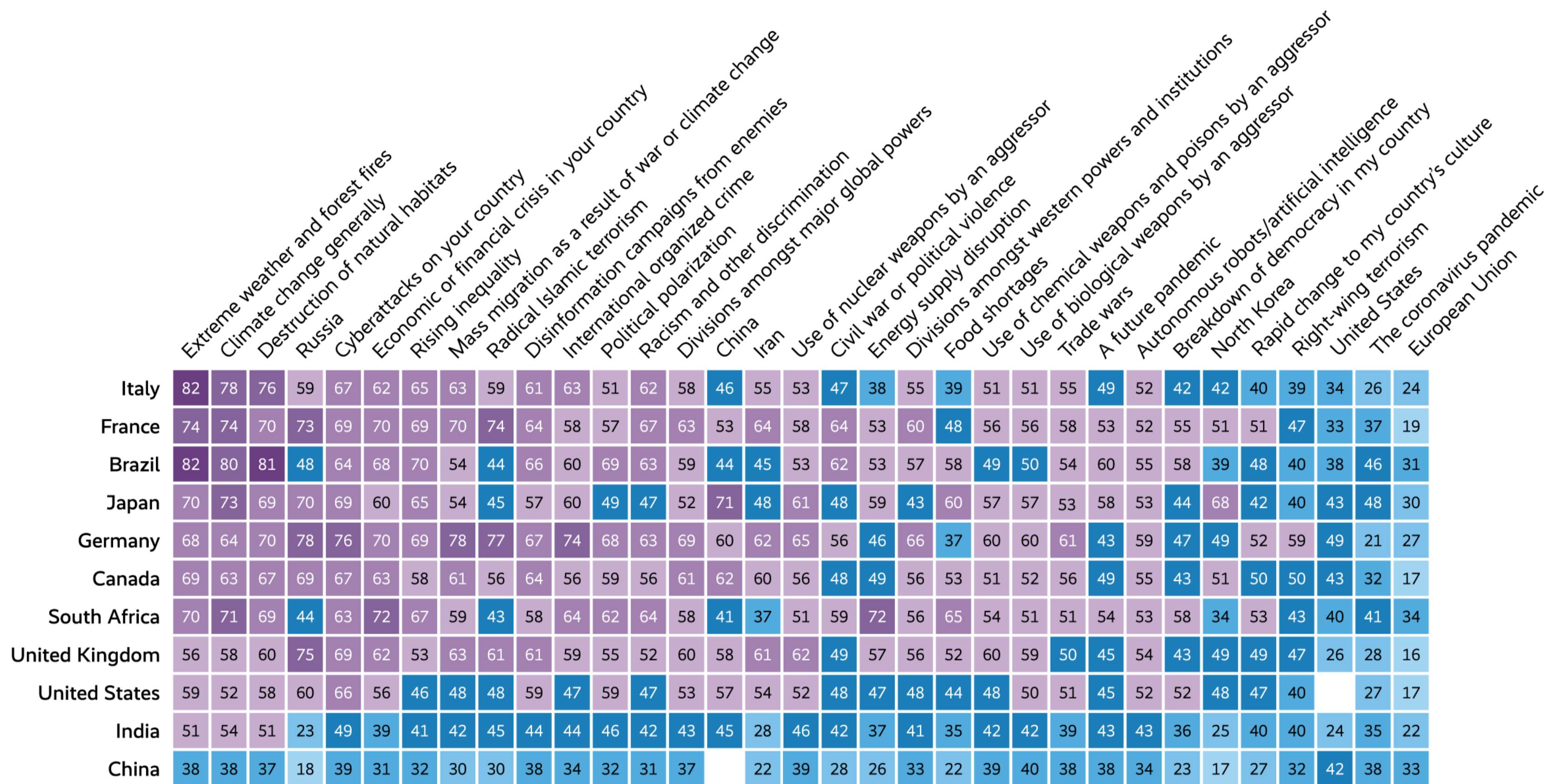
Divergence in Optimism Between the G7 and BICS

Public opinion in Brazil, India, China, and South Africa is notably more optimistic about the future compared to citizens in G7 countries. In China and India, a strong majority is confident their country will be more secure and wealthier in 10 years. South Africa and Brazil display similar optimism, surpassing most G7 nations. A plurality of Americans anticipate better future security and prosperity, but this sentiment is not widely shared among other G7 member citizens. In Japan, the most pessimistic nation, 54% disagree that the country will be more secure in a decade, with 56% expressing scepticism about future wealth.

This divergence in sentiment about the future poses challenges for senior executives in global companies, affecting both external and internal messaging. Businesses can engage audiences in their vision for a positive future by being clear about the organization's mission and its role in improving lives, using concrete examples that resonate. Test messaging in different markets and adapt it to convey a coherent and valuable message effectively to specific audiences.

The risk heatmap

November 2024, 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

2



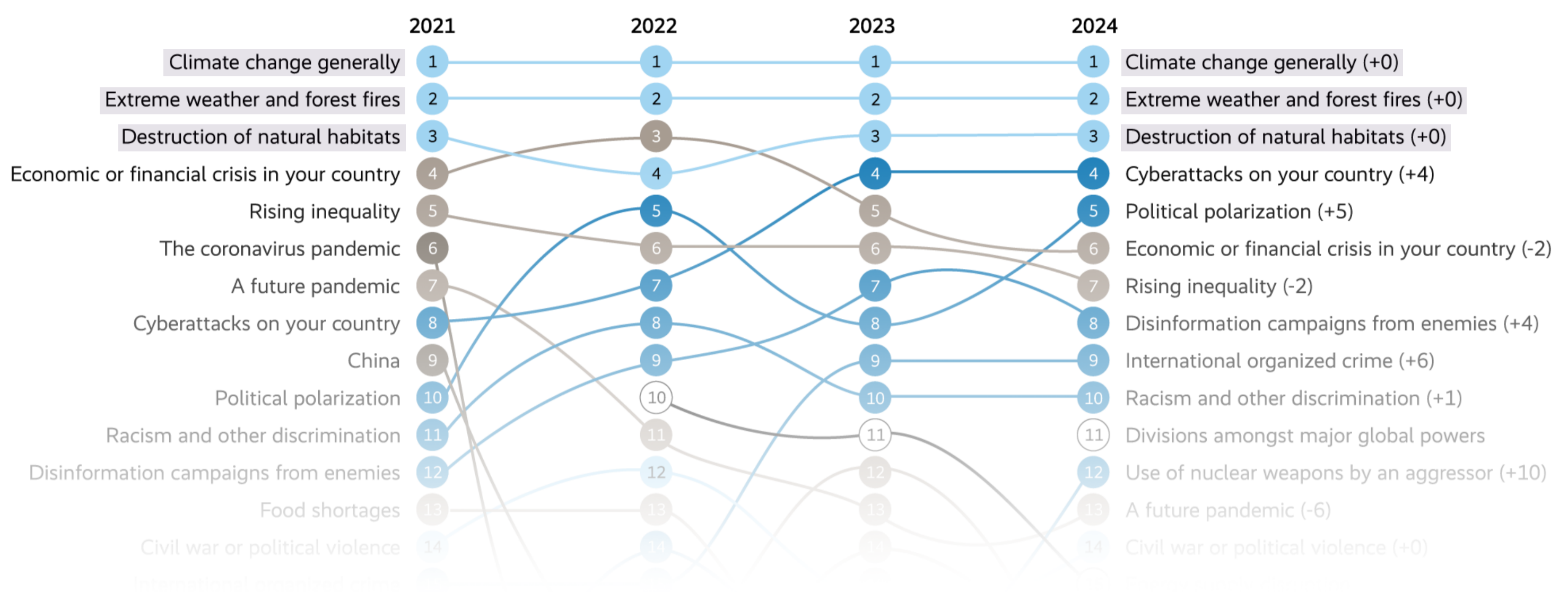
Centrality of Environmental Risks

Despite geopolitical and financial upheaval across the G7, environmental issues remain the primary concern globally. Extreme weather, natural habitat destruction, and climate change rank as the first, second, and fourth risks, consistently topping concerns since 2021. BICS countries demonstrate the highest level of concern for environmental issues, ranking them as the top three risks. These risks rank slightly lower in the G7, but remain in the top five.

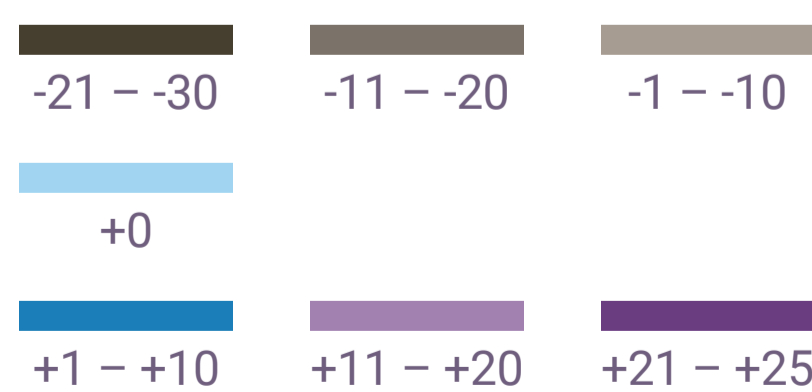
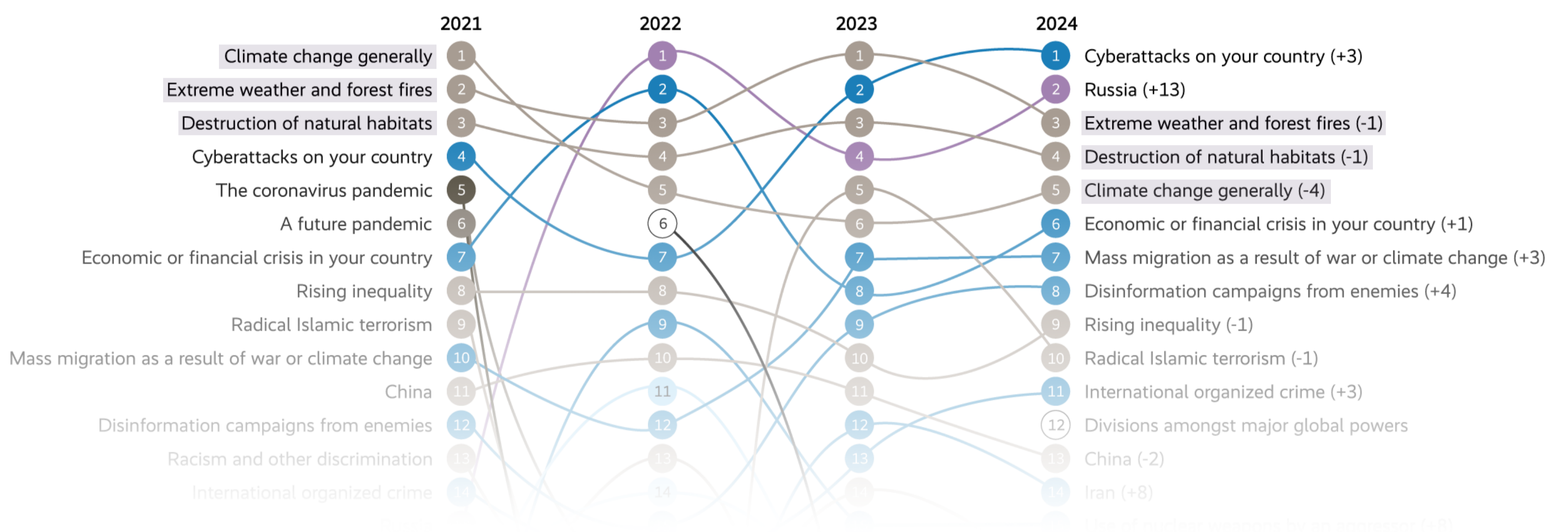
While the political winds and consumer spending power may change direction, and labels like ESG come under scrutiny, audiences remain concerned about the real-life impact of climate change now, and the prospect for deterioration in the future. Companies should communicate carefully and be disciplined about focusing on the financial and operational relevance of environmental risks. This includes – particularly in BICS countries – showing what action companies are taking to mitigate and/or build resistance to climate change and extreme weather events.

Amid a constantly evolving risk landscape, environmental risks consistently rank at the top

The 'BICS' risk bump chart, aggregate ranking of risks

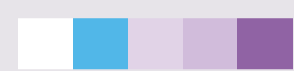


The G7 risk bump chart, aggregate ranking of risks



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

3



Changing Perceptions on China

While China is seen by American policymakers across the aisle as a growing threat, publics in countries around the world feel less threatened by China than they did last year. Among G7 citizens, China's perceived threat dropped from 11th to 13th place. A significant change is seen in India, Brazil and South Africa, where China's position on the risk index plummeted from 9th to 25th. In 9 of the 11 countries surveyed, including the US, China's perceived risk among the general public has either declined or stayed stable. Germany and the UK show slight increases.

Global businesses communicating about and operating in China increasingly find themselves in a challenging position. Western governments demand assurances that supply chains do not source materials from Xinjiang, while Chinese authorities insist that providing such assurances will be penalized. These data indicate that, while global publics often remain sceptical of the Chinese authorities' intentions, they are less likely than politicians to advocate for decoupling from China. Companies should clarify with high-priority stakeholders in private how they're managing their supply chains to mitigate political risks as much as possible, and should not use public messaging to try to inform or shape opinion. This will be a tricky balance to strike.

4



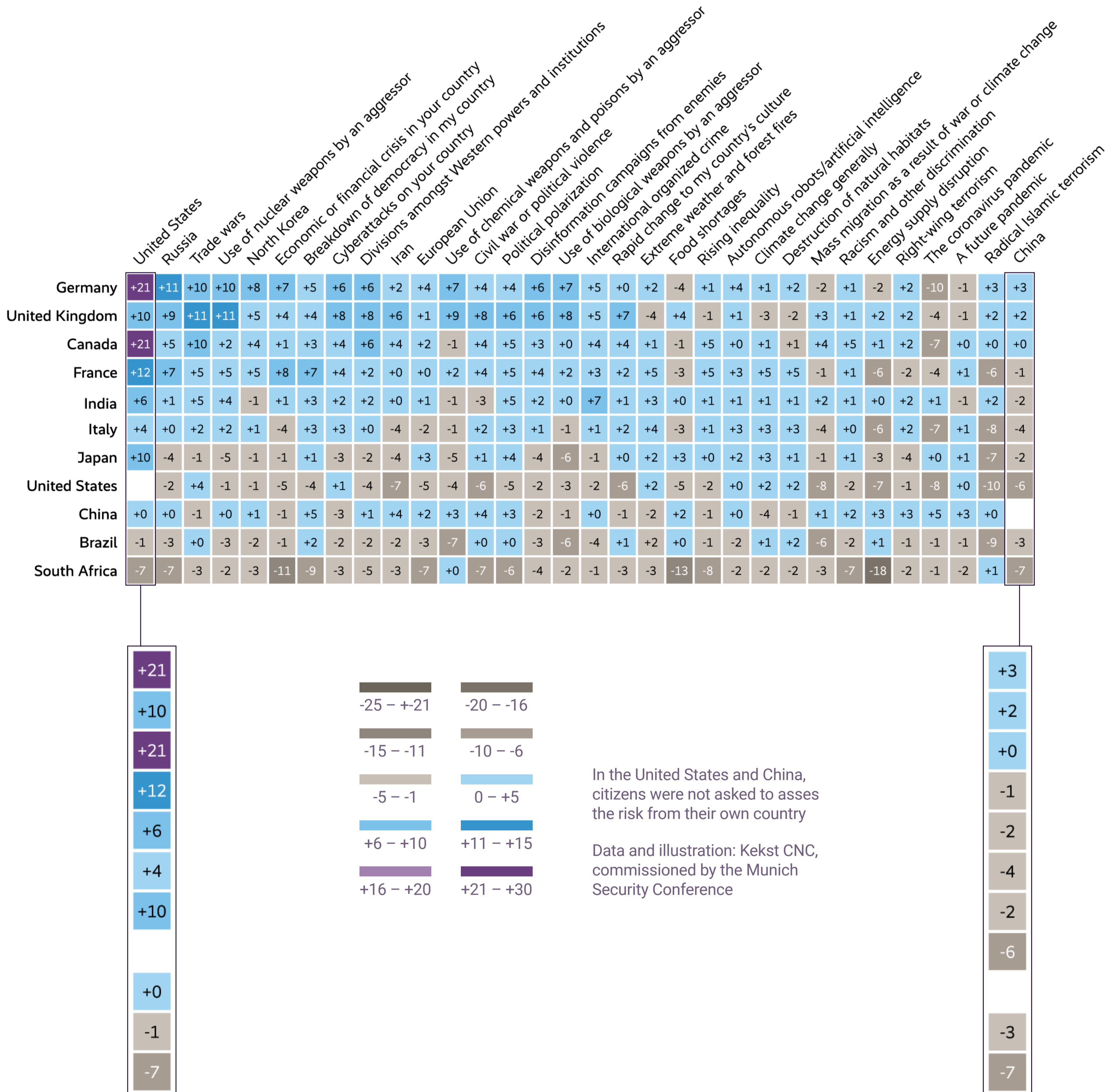
More Wariness of the United States

Data collected after the presidential election captured rising apprehension about the US among its allies. The US risk score rose across all G7 nations, peaking in Germany and Canada with a 21-point increase, the most significant among surveyed risks. Despite this, the US is still considered an ally by all surveyed nations, except China.

US companies operating globally should continue to be very deliberate about how and where they fly the flag for the US and associate themselves overtly with the US Government. It will deliver benefits in some circumstances, but there is the potential for rapid swings in opinion, and companies should be alert to that and ready to adjust their posture and messaging quickly in global markets, in line with a pre-agreed strategy if/as required.

The change heatmap

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



5



Increasingly Anxious Germans

Ahead of its upcoming elections, Germany identifies more threats than any major economy, with five risks scoring above 70 out of 100. Key risks include mass migration, Russia, cyberattacks, economic crises, and organized crime. German pessimism about future security and prosperity is significant, with 52% disagreeing about improved future security and 52% disagreeing about wealth enhancement over the next ten years, second in pessimism only to Japan in these views.

These anxieties give companies an opportunity to play an active role in addressing concerns, by showing how your business is working with communities in Germany to ensure a brighter future and drive value. Be conscious of people's concerns, and strike a tone that recognises that many feel threatened, but take actions (not words) that help chart a way forwards.

Germany: Top 10 perceived threats

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Mass migration as a result of war or climate change	78	-2	 70	48
Russia	78	+11	 65	49
Radical Islamic terrorism	77	+3	 76	39
Cyberattacks on your country	76	+6	 76	40
International organized crime	74	+5	 77	36
Destruction of natural habitats	70	+2	 65	37
Economic or financial crisis in your country	70	+7	 66	40
Rising inequality	69	+1	 68	40
Divisions amongst major global powers	69	+0	 62	42
Extreme weather and forest fires	68	+4	 67	36

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



For more information, please contact us at geopolitics@kekstcnc.com

Kekst CNC is the global strategic communications boutique that specializes in protecting and enhancing reputations. From 14 offices around the globe, our team of 300 professionals provides expert communications counsel, informed by judgment, insights and data-led analysis.

We apply our communications expertise across high-stakes corporate, financial, and political matters, helping businesses communicate effectively through periods of disruption, transformation and growth.

Kekst CNC is part of the worldwide Publicis Groupe.

www.kekstcnc.com