

# Munich Security Index 2023

The world is becoming a riskier place. The Russian war of aggression and its ramifications have dramatically increased risk perceptions among citizens around the world. But these traditional security threats only add to, not replace, citizens' existing concerns about China or transnational risks like climate change. The Munich Security Index 2023 is thus a testament to a new age in global politics marked by an omnipresent sense of insecurity.

Since 2021, the MSC and Kekst CNC have collected data to answer core questions that help understand citizens' 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 twelve countries view 32 major risks and how these perceptions change over time. This edition of the index is based on representative samples of 1,000 people from each G7 country, BRICS countries, except Russia ("BICS"), and Ukraine. The total sample thus amounts to 12,000 people. This edition is exceptional because the MSC and Kekst CNC decided not to poll in Russia and instead include Ukraine. Against the background of the war and intensifying repressions, conducting meaningful surveys in Russia is difficult and may lead to unreliable responses. Instead, the index includes a sample from Ukraine as one of the main sites where competing order visions are playing out. The polling was conducted from October 19 to November 7 using industry-leading online panels, with stratified quotas and weights to gender, age, and region to ensure representativeness. But polling in Ukraine, which took place from November 8 to 28, came with immense difficulties. Fieldwork began as Russia was intensifying its bombing of civilian infrastructure. The ensuing blackouts meant Ukrainians struggled to access the internet. Surveying by phone therefore had to complement online surveys. The result of three weeks of fieldwork is a unique snapshot of how Ukrainians feel about the war, their allies, and the future.

Overall, the Munich Security Index 2023 registers an increase in 20 risk indicators compared to the previous survey, which itself recorded significantly higher risk awareness than in the preceding year ([Figure 1.13](#)). The Russian war of aggression is the central driving force of heightened perception of risk. In all countries surveyed bar India, the risk index score for Russia rose significantly. While Russia was not seen as a top five risk in any of the G7 countries only a year ago, citizens in five G7 countries now consider Moscow

the number one risk (Figure 1.12). Differences in risk perceptions between citizens in G7 countries and others are profound, however. Notwithstanding sizeable increases in the risk index scores in Brazil, China, and South Africa, Russia ranks fairly low in four BRICS countries. China continues to be a significant concern but is considered less of a threat than Russia in all countries, including Japan and the US. The wider ramifications of Russia's war also feature prominently in citizens' risk perceptions. An economic or financial crisis is now the aggregate number one risk, likely fueled by rampant inflation worldwide, which the Russian war has contributed to. Energy supply disruption ranks a top risk in the UK and South Africa and is considered a significant risk in most other countries. Amid Putin's nuclear posturing, weapons of mass destruction have risen significantly in citizens' risk awareness, with concern highest in Ukraine, Germany, and Japan.

While differences between G7 countries and four BRICS countries on Russia's war abound, perceptions of environmental risks are widely shared. On aggregate, climate change ranks as the second highest risk, followed by destruction of natural habitats in third, and extreme weather and forest fires in fourth. In Brazil, India, and Italy, environmental risks top the ranking. Contrary to fears that Russia's war on Ukraine would distract from other pressing threats, citizens continue to be acutely aware of so-called non-traditional security concerns that particularly beset poorer countries. Only a few risks have fallen in citizens' perceptions. For instance, the risks of the coronavirus pandemic plummeted in the rankings in all countries except China – a manifestation of Beijing's failed zero-Covid policy (Figure 1.13).

Both the Russian war and the growing systemic competition also shape citizens' views of other countries. Russia, like its satellite Belarus, is overwhelmingly considered a threat except by China, India, and South Africa (Figure 1.14). Views among G7 countries have converged; Italy, which held positive views of Russia in the last index, now clearly sees Russia as a threat. China is also considered more of a threat than an ally in all G7 countries while viewed as more of an ally in South Africa and Brazil. Japanese and German citizens hold the most critical views of China. Compared to the last index, Ukraine is the biggest winner in perceptions as an ally (Figure 1.15). Poland's central role in assisting Ukraine has helped it see the second biggest improvement in views, while the US continues the trend of the past edition by further improving its reputation.



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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.



### Question 1 – How great is the overall risk to your country?

For each of the following, please say how great a risk it poses to your country.

- Answer scale 0 – 10 [with 0 the lowest and 10 the greatest risk]



### Question 2 – Will the risk increase or decrease over the next twelve months?

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.

- Answer scale 0 – 10 [with 0 the strongest decrease, 5 no change, and 10 the strongest increase]



### Question 3 – How severe would the damage be if it happened?

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.

- Answer scale 0 – 10 [with 0 very low and 10 very severe damage]



### Question 4 – How imminent is the risk?

For each of the following, please say how imminent a threat you think it is.

- Answer scale 1 – 8 [with 1 "now or in the next few months" and 8 "never"]
- Rescaled to 0 – 10 and reversed<sup>2</sup>



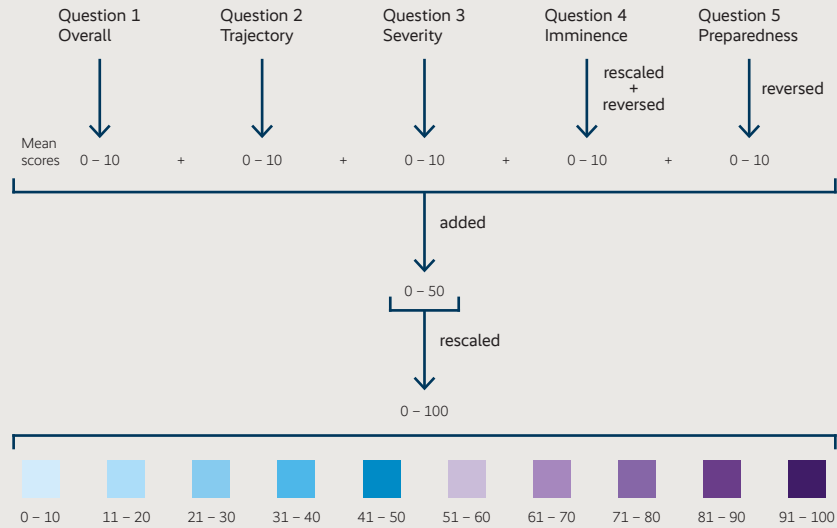
### Question 5 – How prepared is your country?

For each of the following, please say how prepared your country is to deal with this threat.

- Answer scale 0 – 10 [with 0 the least and 10 the most prepared]
- Reversed<sup>3</sup>

## 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 (see page 42) that features all twelve countries surveyed and how they score on each of the 32 risks covered, the Munich Security Index also includes an overview of how risk perceptions have changed since the last Munich Security Index was published (see page 43).

### Country profiles

The index also provides more detailed insights into the individual risk profiles of the twelve countries surveyed (pages 44-55).

	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 2022 version of the index was based on surveys conducted in November of 2021.

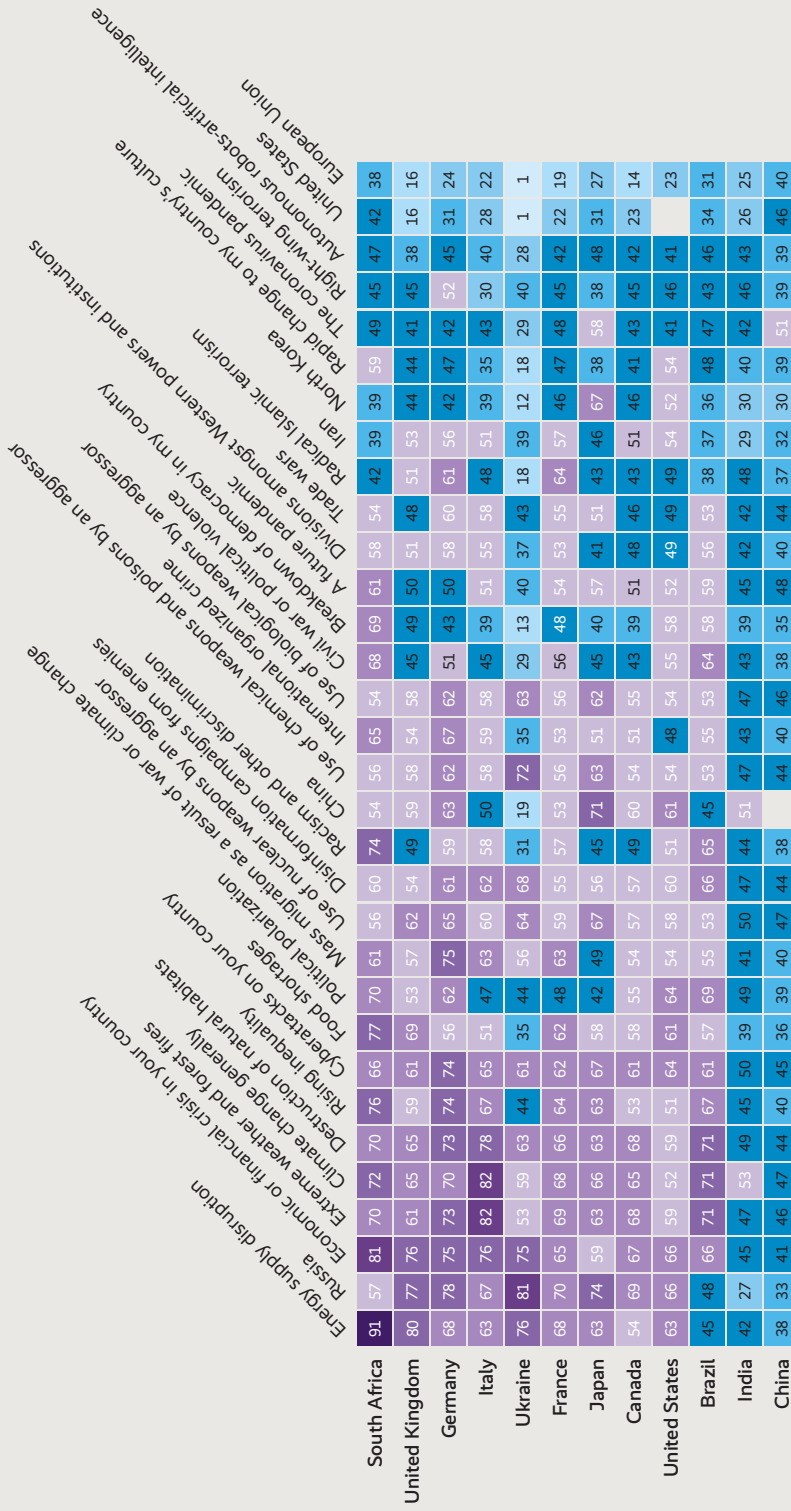
#### Share thinking risk is imminent

Percentage of respondents who answered “how 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 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.”

Figure 1.12  
The risk heatmap, October–November 2022, score



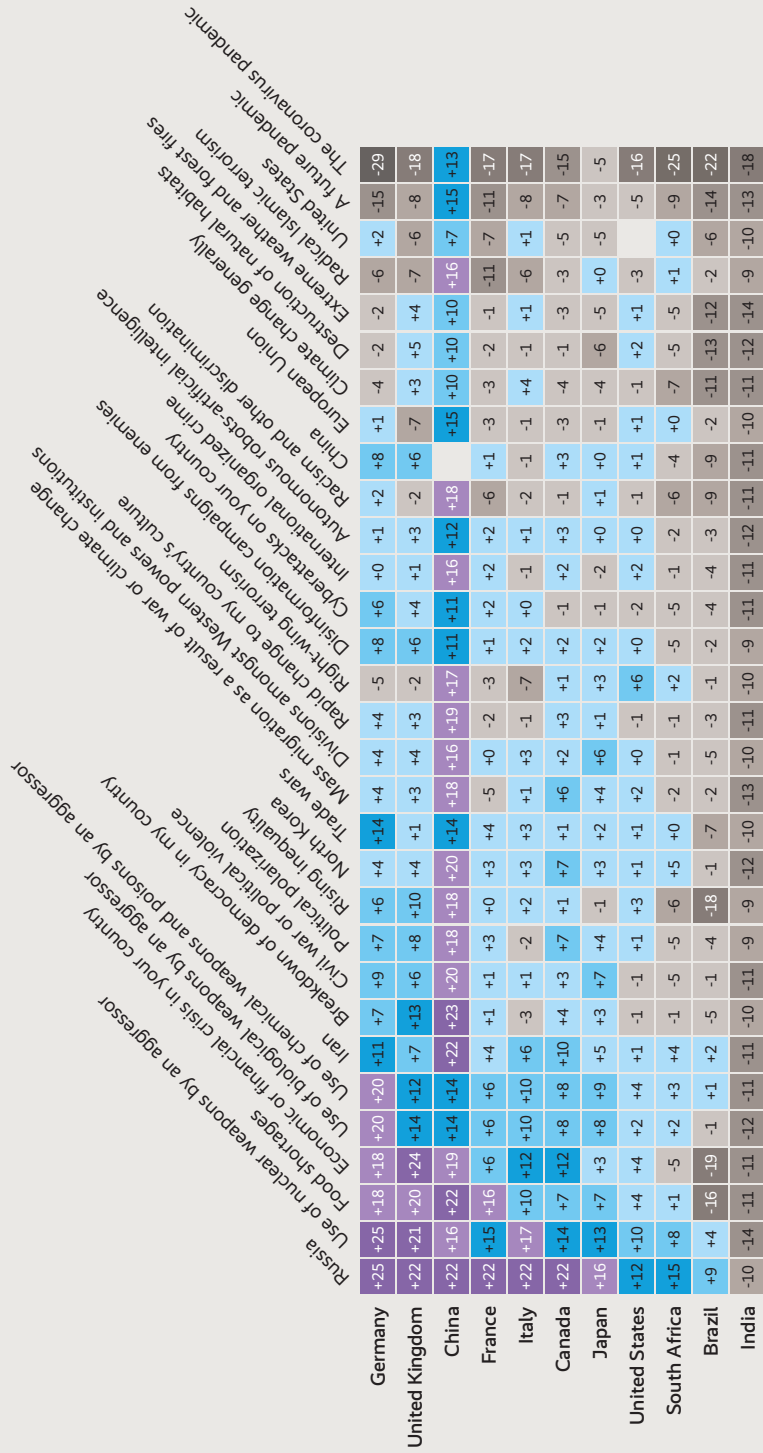
In the United States and China, citizens were not asked to assess the risk from their own country.



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



Figure 1.13 The change heatmap, October–November 2022, change in index score since November 2021



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

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

-30 -26 -25 -21 -20 -16 -15 -11 -10 -6 -5 -1 -0 +5 +6 +10 +11 +15 +16 +20 +21 +25

## Canada

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Russia	69	+22	63	39
Extreme weather and forest fires	68	-3	67	28
Destruction of natural habitats	68	-1	65	27
Economic or financial crisis in your country	67	+12	66	29
Climate change generally	65	-4	62	29
Cyberattacks on your country	61	-1	65	25
China	60	+3	56	37
Food shortages	58	+7	60	29
Use of nuclear weapons by an aggressor	57	+14	47	42
Disinformation campaigns from enemies	57	+2	67	25
Use of biological weapons by an aggressor	55	+8	49	44
Political polarization	55	+7	61	24
Use of chemical weapons and poisons by an aggressor	54	+8	46	44
Mass migration as a result of war or climate change	54	+6	56	28
Energy supply disruption	54	-	58	26
Rising inequality	53	+1	62	24
A future pandemic	51	-7	54	21
Iran	51	+10	51	33
International organized crime	51	+2	56	26
Racism and other discrimination	49	-1	64	20
Divisions amongst Western powers and institutions	48	+2	48	26
Trade wars	46	+1	51	23
North Korea	46	+7	42	35
Right-wing terrorism	45	+1	52	26
The coronavirus pandemic	43	-15	64	16
Radical Islamic terrorism	43	-3	50	27
Civil war or political violence	43	+3	46	27
Autonomous robots-artificial intelligence	42	+3	45	26
Rapid change to my country's culture	41	+3	42	26
Breakdown of democracy in my country	39	+4	35	28
United States	23	-5	30	27
European Union	14	-3	26	22

1 Canadian respondents remain the least anxious nation among the G7 and “BICS.” When asked how safe the world is, only 41 percent said that they felt it is unsafe – compared to 46 percent of US respondents and 58 percent of German respondents.

2 Despite a significant increase in the risk posed by Russia – jumping up 22 points and 16 places to an index score of 69 – Canadian respondents remain relatively unperturbed. The perceived risk posed by extreme weather events and forest fires has also slightly decreased (by three points to 68), as has the risk of climate change, which is down by four points.

3 The perceived risk of an economic or financial crisis has significantly increased among Canadian respondents – by 12 points since November 2021. This puts Canada in the middle of the G7 regarding this risk, with a smaller increase than in the UK (+24 points) but a larger change than in France (+6 points).

**+12** is the index score increase of the risk of an economic or financial crisis.

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
Russia	70	+22	59	28
Extreme weather and forest fires	69	-1	62	24
Climate change generally	68	-3	59	25
Energy supply disruption	68	-	66	25
Destruction of natural habitats	66	-2	63	24
Economic of financial crisis in your country	65	+6	63	24
Radical Islamic terrorism	64	-11	65	19
Rising inequality	64	+0	62	23
Mass migration as a result of war or climate change	63	-5	57	27
Cyberattacks on your country	62	+2	59	20
Food shortages	62	+16	60	23
Use of nuclear weapons by an aggressor	59	+15	49	23
Racism and other discrimination	57	-6	62	18
Iran	57	+4	52	25
Use of biological weapons by an aggressor	56	+6	49	27
Use of chemical weapons and poisons by an aggressor	56	+6	49	26
Civil war or political violence	56	+1	49	24
Disinformation campaigns from enemies	55	+1	58	16
Trade wars	55	+4	56	19
A future pandemic	54	-11	58	19
Divisions amongst Western powers and institutions	53	+0	51	21
China	53	+1	47	29
International organized crime	53	+2	52	19
The coronavirus pandemic	48	-17	66	14
Political polarization	48	+3	52	17
Breakdown of democracy in my country	48	+1	42	28
Rapid change to my country's culture	47	-2	41	27
North Korea	46	+3	39	25
Right-wing terrorism	45	-3	52	19
Autonomous robots-artificial intelligence	42	+2	44	20
United States	22	-7	32	23
European Union	19	-3	33	20

1 In France, as in many other places, the perceived threat posed by Russia has skyrocketed – from rank 25 to number one. However, French respondents are less concerned than the rest of their European counterparts about the risks posed by nuclear, biological, and chemical weapons, as well as by cyberattacks.

2 French respondents' concerns about radical Islamic terrorism remain the highest of all countries surveyed, but have fallen considerably in both relative and absolute terms. In November 2021, radical Islamic terrorism was seen as the most serious risk facing France – it has now dropped to seventh place.

3 French respondents perceive a lower level of absolute climate risk than their German or Italian counterparts. However, in relative terms, climate change is seen as a highly pressing threat, with extreme weather events, climate change, and the destruction of natural habitats ranked as the second, third, and fifth most serious risks, respectively. Concerns about energy supply disruptions appear to have done little to diminish perceptions of climate risks.

-6 is the decrease in rank of 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
Russia	78	+25	67	45
Mass migration as a result of war or climate change	75	+4	70	39
Economic or financial crisis in your country	75	+18	72	36
Cyberattacks on your country	74	+6	74	36
Rising inequality	74	+6	71	39
Extreme weather and forest fires	73	-2	71	37
Destruction of natural habitats	73	-2	68	37
Climate change generally	70	-4	64	35
Energy supply disruption	68	-	67	39
International organized crime	67	+0	72	31
Use of nuclear weapons by an aggressor	65	+25	51	54
China	63	+8	57	45
Use of biological weapons by an aggressor	62	+20	50	54
Use of chemical weapons and poisons by an aggressor	62	+20	51	53
Political polarization	62	+7	68	27
Radical islamic terrorism	61	-6	67	31
Disinformation campaigns from enemies	61	+8	69	29
Trade wars	60	+14	59	37
Racism and other discrimination	59	+2	68	27
Divisions amongst Western powers and institutions	58	+4	56	33
Food shortages	56	+18	59	34
Iran	56	+11	54	38
Right-wing terrorism	52	-5	64	25
Civil war or political violence	51	+9	53	37
A future pandemic	50	-15	62	27
Rapid change to my country's culture	47	+4	50	33
Autonomous robots-artificial intelligence	45	+1	51	31
Breakdown of democracy in my country	43	+7	36	40
The coronavirus pandemic	42	-29	67	20
North Korea	42	+4	43	37
United States	31	+2	34	34
European Union	24	+1	35	31

1 German respondents are extremely concerned about the threat posed by Russia, which receives a German risk index score of 78 – higher than in any other country surveyed, bar Ukraine. The increase in the perceived Russia risk since the invasion of Ukraine has been enormous. Last year, Russia was ranked 18th out of 32 potential risks. Now it is first. Associated perceived risks, such as the use of nuclear, biological, or chemical weapons, have also increased significantly, each climbing 20 points or more on Germany's risk index.

2 Worries about the economy are very strong, with the risk of an economic or financial crisis having climbed 18 points to 75, and the perceived threat of energy supply disruption is also significant at 68. Rising inequality is rated as the fifth most serious risk facing the country.

3 German respondents continue to show comparatively high levels of concern about climate change – extreme weather events, the destruction of natural habitats, and climate change are all among the ten most serious risks facing the country. However, the perceived severity of each of these risks has marginally decreased since November 2021.

+18 is the increase in the perceived risk of an economic or financial crisis.

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
Climate change generally	82	+4	69	36
Extreme weather and forest fires	82	+1	73	37
Destruction of natural habitats	78	-1	68	36
Economic or financial crisis in your country	76	+12	71	35
Rising inequality	67	+2	65	32
Russia	67	+22	60	42
Cyberattacks on your country	65	+0	70	26
Mass migration as a result of war or climate change	63	+1	61	35
Energy supply disruption	63	-	63	36
Disinformation campaigns from enemies	62	+2	67	27
Use of nuclear weapons by an aggressor	60	+17	48	53
International organized crime	59	-1	65	25
Use of biological weapons by an aggressor	58	+10	47	53
Use of chemical weapons and poisons by an aggressor	58	+10	47	52
Racism and other discrimination	58	-2	64	27
Trade wars	58	+3	58	30
Divisions amongst Western powers and institutions	55	+3	58	28
A future pandemic	51	-8	54	21
Food shortages	51	+10	48	34
Iran	51	+6	50	35
China	50	-1	48	39
Radical Islamic terrorism	48	-6	54	27
Political polarization	47	-2	54	22
Civil war or political violence	45	+1	43	33
The coronavirus pandemic	43	-17	65	15
Autonomous robots-artificial intelligence	40	+1	46	27
Breakdown of democracy in my country	39	-3	35	34
North Korea	39	+3	40	34
Rapid change to my country's culture	35	-1	34	33
Right-wing terrorism	30	-7	41	25
United States	28	+1	35	33
European Union	22	-1	32	27

1 Climate change is the top risk perceived by Italian respondents. In fact, the top three risks in Italy are all ecological ones, with climate change replacing extreme weather events as the top risk this year. There is a slight gender gap in the perception of climate change, with the index score for Italian women being 86, while that for men is 77. However, the risk is felt evenly across Italians of different ages, levels of education, and incomes.

2 The risk of an economic or financial crisis is the fourth-ranked risk in Italy and the first nonecological risk on the list. It has moved up two places and 12 points since November 2021.

3 The risk posed by Russia has risen 22 points, but with an index score of 67, it still only ranks sixth among Italian respondents. It is the second lowest among all G7 countries surveyed after the US (where it has a score of 66).

9 is the index score gap between male and female Italians when it comes to climate risks.

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	+16	54	36
China	71	+0	50	33
Use of nuclear weapons by an aggressor	67	+13	39	42
Cyberattacks on your country	67	-1	59	27
North Korea	67	+3	49	33
Climate change generally	66	-4	53	25
Use of chemical weapons and poisons by an aggressor	63	+9	37	42
Extreme weather and forest fires	63	-5	52	23
Destruction of natural habitats	63	-6	50	25
Rising inequality	63	-1	53	30
Energy supply disruption	63	-	39	34
Use of biological weapons by an aggressor	62	+8	38	43
Economic or financial crisis in your country	59	+3	44	27
The coronavirus pandemic	58	-5	68	16
Food shortages	58	+7	37	32
A future pandemic	57	-3	51	21
Disinformation campaigns from enemies	56	+2	51	27
Trade wars	51	+2	41	23
International organized crime	51	-2	45	27
Mass migration as a result of war or climate change	49	+4	41	26
Autonomous robots-artificial intelligence	48	+0	44	22
Iran	46	+5	34	30
Racism and other discrimination	45	+1	44	24
Civil war or political violence	45	+7	36	27
Radical Islamic terrorism	43	+0	35	31
Political polarization	42	+4	38	25
Divisions amongst Western powers and institutions	41	+6	31	24
Breakdown of democracy in my country	40	+3	25	27
Right-wing terrorism	38	+3	31	26
Rapid change to my country's culture	38	+1	26	25
United States	31	-5	22	25
European Union	27	-1	18	26

1 Russia is now the top threat for Japanese respondents. It is up nine places and 16 points since November 2021, meaning that the top two perceived threats in Japan are other countries: apart from Russia, Japanese respondents also worry about China. Japan is the only country among the G7 or “BICS” that has more than one country among its top five risks – since North Korea is fifth on the list, it actually has three.

2 Among Japanese respondents, the use of nuclear weapons by an aggressor has also seen a big jump in the risk ranking – up nine places since November 2021. It now constitutes the third biggest perceived risk.

3 Perceptions of climate risks are down marginally for the first time in Japan by four points, with 53 percent of Japanese respondents feeling that climate change is a risk that will manifest itself within the next five years.

↑ +9 is how many places the use of nuclear weapons by an aggressor has moved up in the ranking of risks.

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
Energy supply disruption	80	-	78	34
Russia	77	+22	68	27
Economic or financial crisis in your country	76	+24	73	33
Food shortages	69	+20	72	32
Climate change generally	65	+3	59	25
Destruction of natural habitats	65	+5	62	25
Use of nuclear weapons by an aggressor	62	+21	54	24
Cyberattacks on your country	61	+4	67	16
Extreme weather and forest fires	61	+4	63	25
Rising inequality	59	+10	64	28
China	59	+6	57	28
Use of biological weapons by an aggressor	58	+14	53	25
Use of chemical weapons and poisons by an aggressor	58	+12	54	26
Mass migration as a result of war or climate change	57	+3	59	29
Disinformation campaigns from enemies	54	+6	65	18
International organized crime	54	+1	63	16
Political polarization	53	+8	60	21
Iran	53	+7	56	23
Radical Islamic terrorism	51	-7	59	16
Division amongst Western powers and institutions	51	+4	53	21
A future pandemic	50	-8	56	18
Racism and other discrimination	49	-2	62	16
Breakdown of democracy in my country	49	+13	47	29
Trade wars	48	+1	57	20
Right-wing terrorism	45	-2	56	17
Civil war or political violence	45	+6	48	23
Rapid change to my country's culture	44	+3	46	25
North Korea	44	+4	43	22
The coronavirus pandemic	41	-18	64	14
Autonomous robots-artificial intelligence	38	+3	43	20
United States	16	-6	26	24
European Union	16	-7	28	19

1 Heightened fear of multiple risks pervades the UK. Chief among them is an economic or financial crisis, which has moved up 24 points since November 2021. Concern is greatest among the oldest members of the surveyed population: the score is 88 among those aged over 65, while it is 68 among those under 35. However, perceptions of the risk posed by an economic or financial crisis do not differ much between respondents with a higher (77) and respondents with a lower income (79).

2 Energy supply disruption, rather than Russia itself, tops the list of risks that UK respondents think their country faces. But the UK is only second to Ukraine in terms of the perceived imminence of the Russia threat. 70 percent of UK respondents also think that this risk is likely to increase, rather than decrease, over the next few months.

3 Food shortages are another risk that has risen a long way up the ranking in the UK since November 2021. It is up 11 places and up 20 points (from 49 to 69). It is a risk perceived more keenly by women (75) than men (62), on average.

From 15 to 4 is how much food shortages have risen in the index.

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
Russia	66	+12	62	22
Economic or financial crisis in your country	66	+4	64	27
Cyberattacks on your country	64	-2	64	19
Political polarization	64	+1	65	23
Energy supply disruption	63	-	64	28
Food shortages	61	+4	63	27
China	61	+1	60	21
Disinformation campaigns from enemies	60	+0	65	19
Extreme weather and forest fires	59	+1	60	22
Destruction of natural habitats	59	+2	58	21
Use of nuclear weapons by an aggressor	58	+10	54	17
Breakdown of democracy in my country	58	-1	54	28
Civil war or political violence	55	-1	56	23
Use of biological weapons by an aggressor	54	+2	51	20
Use of chemical weapons and poisons by an aggressor	54	+4	52	19
Mass migration as a result of war or climate change	54	+2	56	25
Rapid change to my country's culture	54	-1	53	25
Iran	54	+1	57	17
A future pandemic	52	-5	54	19
Climate change generally	52	-1	54	22
North Korea	52	+1	53	17
Racism and other discrimination	51	-1	61	20
Rising inequality	51	+3	58	20
Radical Islamic terrorism	49	-3	55	16
Divisions amongst Western powers and institutions	49	+0	51	18
Trade wars	49	+1	56	18
International organized crime	48	+2	53	16
Right-wing terrorism	46	+6	53	18
The coronavirus pandemic	41	-16	59	14
Autonomous robots-artificial intelligence	41	+0	47	20
European Union	23	+1	36	15

1 Russia has jumped to being the top risk perceived by US respondents – up 13 places in just one year. There is little polarization in US views about the risk Russia presents. Democrats give Russia an index score of 67, while Republicans see a somewhat greater risk, giving it a score of 71.

2 There has been no corresponding increase in the perceived risk posed by China. It is down two places and up one point, with an overall index score of 61. There is, however, a marked partisan split – just as in November 2021. The index score among Democrats is 59, and among Republicans 70.

3 Among older age groups in the US, political polarization is a risk keenly felt. US adults aged 65 or older give polarization a risk index score of 89, making it their greatest concern. Those aged 35 or younger give polarization a score of 48 and do not see it as one of their top five concerns.

62% of US adults feel the threat from Russia is imminent.

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

## Ukraine



1 Other than Russia itself, the top risk Ukrainians perceive is energy supply disruption. What is remarkable is that a people whose energy grid is under almost daily kinetic attack is not the country with the highest risk index score for energy supply disruptions – it only ranks third. People in South Africa and the UK are more worried about this risk. The reason Ukrainians are relatively less worried is that they feel prepared for what is happening and many believe that the worst is already behind them. Only 45 percent of Ukrainian respondents believe that the problem of energy supply disruption is likely to get worse in the next 12 months compared to 72 percent in South Africa and 70 percent in the UK. Only 14 percent of Ukrainians feel that their country is unprepared for energy supply disruptions – compared to 47 percent in South Africa and 34 percent in the UK.

2 Of the nuclear, biological, and chemical risks faced by Ukraine, it is the threat of chemical weapons that is perceived as the most pressing. The risk of chemical weapons has a risk index score of 72 – compared to 64 for nuclear weapons and 63 for biological weapons.

14% of Ukrainians say they feel unprepared for energy supply disruptions.

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
Climate change generally	71	-11	66	33
Extreme weather and forest fires	71	-12	66	34
Destruction of natural habitats	71	-13	64	34
Political polarization	69	-4	68	29
Rising inequality	67	-18	63	34
Disinformation campaigns from enemies	66	-2	63	32
Economic or financial crisis in your country	66	-19	62	35
Racism and other discrimination	65	-9	67	28
Civil war or political violence	64	-1	60	34
Cyberattacks in your country	61	-4	57	35
A future pandemic	59	-14	54	30
Breakdown of democracy in my country	58	-5	51	34
Food shortages	57	-16	51	35
Divisions amongst Western powers and institutions	56	-5	55	27
Mass migration as a result of war or climate change	55	-2	57	27
International organized crime	55	-4	52	38
Use of nuclear weapons by an aggressor	53	+4	44	52
Use of biological weapons by an aggressor	53	-1	43	52
Use of chemical weapons and poisons by an aggressor	53	+1	43	51
Trade wars	53	-7	56	29
Rapid change to my country's culture	48	-3	49	30
Russia	48	+9	45	42
The coronavirus pandemic	47	-22	56	25
Autonomous robots-artificial intelligence	46	-3	49	35
China	45	-9	41	39
Energy supply disruption	45	-	44	34
Right-wing terrorism	43	-1	46	37
Radical Islamic terrorism	38	-2	39	43
Iran	37	+2	36	37
North Korea	36	-1	35	38
United States	34	-6	37	36
European Union	31	-2	36	34

1 The risk perception by Brazilian respondents is down almost across the board, with only the perceived risk of Russia and Iran and the use of nuclear or chemical weapons having increased since November 2021. Particularly notable are the 19, 18, and 16-point decreases seen for the risk of an economic or financial crisis, rising inequality, and food shortages, respectively. Each of these decreases bucks international trends of increased perceived risks.

2 Ecological risks now make up the three greatest perceived threats facing Brazil. While concern about each of these risks has decreased in the past 12 months, it remains high in global comparison.

3 While having moderately increased, Brazilian respondents' perception of the risks posed by both Russia and energy supply disruptions remains very low compared to other countries surveyed. Ranking 22nd and 26th, respectively, out of 32 potential threats, risk perceptions are lower only in India and China. Younger people are the most concerned, with 18- to 24-year-olds rating the Russian risk at 55, and respondents older than 65 rating it at 43.

-18 is the index score decrease in the perceived threat posed by rising inequality.

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
The coronavirus pandemic	51	+13	59	4
A future pandemic	48	+15	58	5
Use of nuclear weapons by an aggressor	47	+16	43	4
Climate change generally	47	+10	48	3
Use of biological weapons by an aggressor	46	+14	40	5
Extreme weather and forest fires	46	+10	45	4
United States	46	+7	46	9
Cyberattacks on your country	45	+11	50	4
Use of chemical weapons and poisons by an aggressor	44	+14	39	5
Disinformation campaigns from enemies	44	+11	48	4
Destruction of natural habitats	44	+10	45	4
Trade wars	44	+14	46	3
Economic or financial crisis in your country	41	+19	40	5
Mass migration as a result of war or climate change	40	+18	39	6
Divisions amongst Western powers and institutions	40	+16	41	5
Rising inequality	40	+18	41	6
European Union	40	+15	41	9
International organized crime	40	+16	42	5
Right-wing terrorism	39	+17	41	6
Autonomous robots-artificial intelligence	39	+12	44	5
Political polarization	39	+18	40	7
Rapid change to my country's culture	39	+19	38	6
Racism and other discrimination	38	+18	39	5
Civil war or political violence	38	+20	37	7
Energy supply disruption	38	-	33	4
Radical Islamic terrorism	37	+16	39	7
Food shortages	36	+22	35	6
Breakdown of democracy in my country	35	+23	33	8
Russia	33	+22	35	11
Iran	32	+22	34	10
North Korea	30	+20	32	11

1 The coronavirus and a future pandemic are the top two risks perceived by Chinese respondents. With a risk index score increase of 13 points, Chinese respondents' concern about the coronavirus pandemic is completely bucking the global trend of an overall decline in risk perception. The perceived risk of a future pandemic is up by five places, with lower-income Chinese respondents being the most concerned (56) and higher-income Chinese respondents the least concerned (46).

2 While overall, China's index scores remain below the global average, the pattern this year is one of increasing worries among Chinese respondents. All five of the top perceived risks have increased by 10 points or more.

3 The perceived risk posed by the US has increased by seven points since November 2021, but it is worth noting that it is still only the seventh-ranked risk among Chinese respondents – climate change, biological weapons, and extreme weather events produce much more concern among those surveyed.

**+13** is the index score rise in the perceived risk of the coronavirus pandemic.

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	53	-11	53	12
China	51	-11	49	10
Use of nuclear weapons by an aggressor	50	-14	55	11
Cyberattacks on your country	50	-11	52	11
Destruction of natural habitats	49	-12	49	14
Political polarization	49	-9	52	14
Radical Islamic terrorism	48	-9	50	13
Use of biological weapons by an aggressor	47	-12	50	13
Use of chemical weapons and poisons by an aggressor	47	-11	47	15
Disinformation campaigns from enemies	47	-9	49	11
Extreme weather and forest fires	47	-14	48	11
Right-wing terrorism	46	-10	50	12
A future pandemic	45	-13	46	13
Rising inequality	45	-9	47	14
Economic or financial crisis in your country	45	-11	48	12
Racism and other discrimination	44	-11	49	13
Autonomous robots-artificial intelligence	43	-12	49	12
Civil war or political violence	43	-11	49	11
International organized crime	43	-11	46	9
The coronavirus pandemic	42	-18	52	10
Divisions amongst Western powers and institutions	42	-10	48	11
Trade wars	42	-10	45	13
Energy supply disruption	42	-	45	11
Mass migration as a result of war or climate change	41	-13	42	14
Rapid change to my country's culture	40	-11	42	12
Breakdown of democracy in my country	39	-10	40	16
Food shortages	39	-11	43	12
North Korea	30	-12	35	11
Iran	29	-11	33	13
Russia	27	-10	36	13
United States	26	-10	32	11
European Union	25	-10	32	13

1 Climate change has moved to the top of the risk list in India, up one place since November 2021. It is a risk that is most pronounced among higher-income Indian respondents, with an index score of 61, compared to only 47 among lower-income respondents.

2 The risk that China poses has moved up to second place, with 49 percent of Indian respondents feeling that the threat posed by China is imminent and likely to manifest itself in the next five years.

3 The use of nuclear weapons by an aggressor is down to third place in the ranking of risks among the Indians surveyed. Cyberattacks are ranked fourth. The largest fall in index scores is recorded for the coronavirus pandemic, which is down 13 places and now ranked as the 20th most worrying risk for Indian respondents.

-13 is the decrease in rank of the perceived risk of the coronavirus pandemic.

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	91	-	75	47
Economic or financial crisis in your country	81	-5	69	38
Food shortages	77	+1	68	37
Rising inequality	76	-6	68	36
Racism and other discrimination	74	-6	69	29
Climate change generally	72	-7	66	31
Extreme weather and forest fires	70	-5	67	30
Destruction of natural habitats	70	-5	64	29
Political polarization	70	-5	65	30
Breakdown of democracy in my country	69	-1	59	35
Civil war or political violence	68	-5	60	36
Cyberattacks on your country	66	-5	62	30
International organized crime	65	-1	59	35
A future pandemic	61	-9	58	26
Mass migration as a result of war or climate change	61	-2	53	37
Disinformation campaigns from enemies	60	-5	59	29
Rapid change to my country's culture	59	-1	54	31
Divisions amongst Western powers and institutions	58	-1	50	34
Russia	57	+15	47	46
Use of nuclear weapons by an aggressor	56	+8	45	49
Use of chemical weapons by an aggressor	56	+3	41	48
Use of biological weapons by an aggressor	54	+2	41	48
Trade wars	54	+0	51	33
China	54	-4	47	43
The coronavirus pandemic	49	-25	64	19
Autonomous robots-artificial intelligence	47	-2	45	35
Right-wing terrorism	45	+2	43	34
Radical Islamic terrorism	42	+1	41	38
United States	42	+0	39	40
Iran	39	+4	40	41
North Korea	39	+5	35	43
European Union	38	+0	36	39

1 Among South African respondents, energy supply disruptions receive the highest index score of any risk in any G7 or “BICS” country surveyed. This is due to 83 percent of South Africans saying that the consequences would be very severe, and 47 percent saying that they feel unprepared for it. 72 percent of South African respondents think that energy supply disruptions will get worse rather than better over the next year.

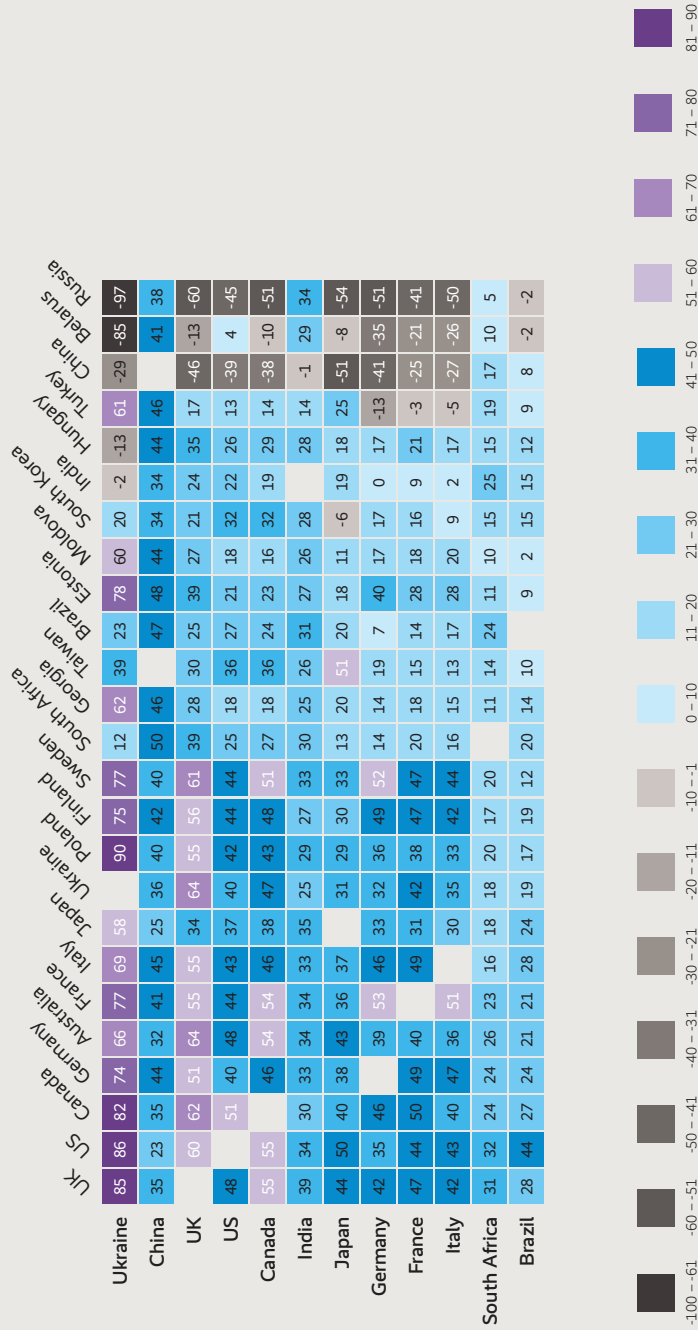
2 South African respondents are overall the most likely to be concerned about food shortages, with 66 percent feeling that it is a significant risk overall. This does not, however, mark a change from last year. South Africa’s index score for food shortages is up by one point to 77, and 8 points away from that of any other country surveyed.

3 South Africa also has the highest index score among all the countries surveyed for the perceived risk of an economic or financial crisis. The risk of an economic or financial crisis was already the top risk among South African respondents in November 2021. In the past year, the G7 and “BICS” countries have been playing catch-up with South Africa.

47% of South African respondents say that they are unprepared for energy supply disruptions.

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

**Figure 1.14**  
**Citizens' perceptions of other countries, share saying country is an ally minus share saying country is a threat, October–November 2022, percent**

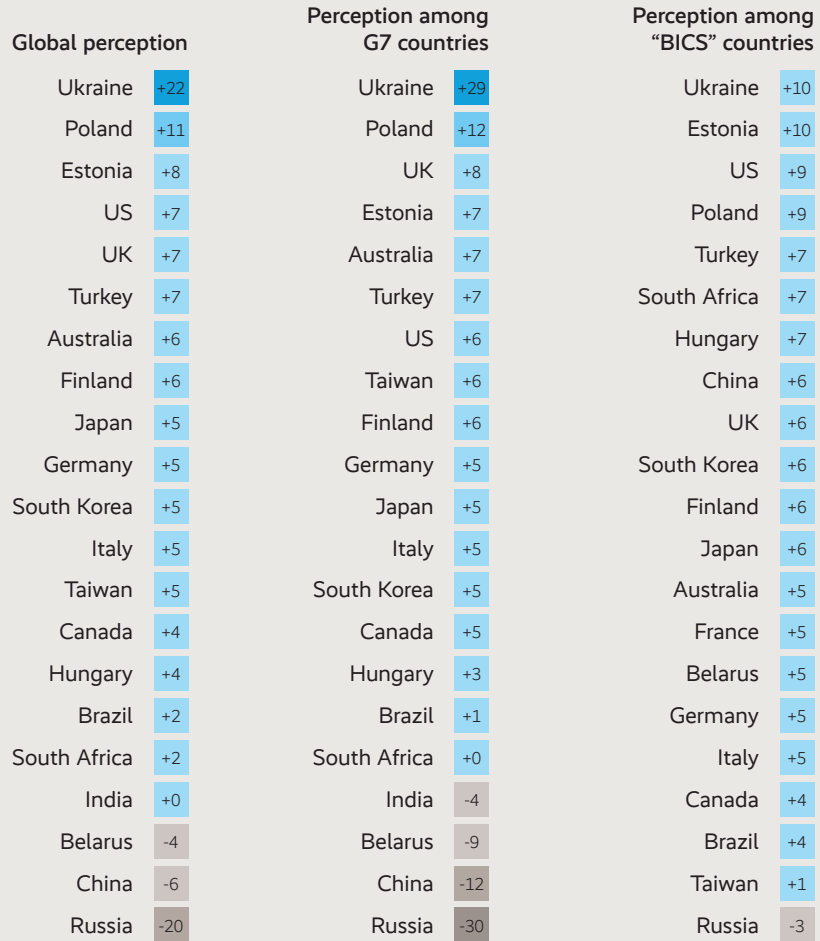


Data and illustration: Kekst CNC, commissioned by the Munich Security Conference



Figure 1.15

Perceptions of other countries as threats or allies, change between November 2021 and October–November 2022, group average



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



# Spotlight Ukraine

The results of running the Munich Security Index in Ukraine are evidence of Ukrainian unity, resilience, and bullishness in face of Russian aggression. Astonishingly, only six percent of Ukrainians feel unprepared to take on Russia's invasion, and even during a winter marked by blackouts and shortages they feel more prepared to face the risk of energy supply disruption than any G7 public. Ukraine's Western orientation is also unequivocal. The vast majority of Ukrainians want to live in a world shaped by European and, to a lesser extent, US rules (Figure 1.16). Russian and Chinese visions of order have virtually no purchase in Ukraine.

In striking contrast to some Western policy-makers, whose concerns about further military escalation appear to hamstring more determined support, Ukrainians have not been intimidated by Russian threats. As devastating as the use of a tactical nuclear weapon against a city or on the battlefield would be, an overwhelming majority of Ukrainians say they would still refuse to surrender if it occurred (Figure 1.17). Moreover, nothing short of a complete Russian withdrawal from Ukrainian territory, including Crimea, suffices for most Ukrainians as acceptable conditions for a ceasefire (Figure 1.18). Even a Russian withdrawal from previously occupied areas would be unacceptable for the majority of Ukrainians if it does not also include Crimea. Premature peace negotiations, calls for which are particularly vocal in some Western capitals, would thus likely meet fierce resistance among the Ukrainian population.

The transatlantic partners also need to start planning for how to ensure Ukraine's long-term security from Russian attacks. Ukrainian citizens are deeply aware of the lasting threat Putin's Russia poses and overwhelmingly believe that they require Western security guarantees (Figure 1.19). What these could look like is still unclear. But most Ukrainians believe that they will need permanent arms supplies from the West. A clear majority also fears that outside of NATO, Ukraine will never be secure, which is corroborated by the fact that Ukrainians place much less faith in the EU to protect them than in NATO.

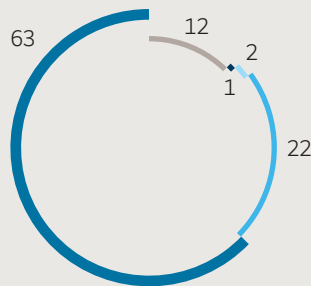
These patterns are also reflected in Ukrainians' evaluation of other countries' responses to the war (Figure 1.20). Those polled judge all G7 countries, as well as Turkey, unequivocally positively. But there are meaningful differences among them – unsurprising given the variation in material support provided,

messaging, and urgency with which countries responded to the war. The UK tops the ranking, closely followed by the US, and Canada, while Western European states trail the Anglophone countries by around 30 percentage points. Meanwhile, Ukrainians perceive China and India to have responded particularly badly, but all actors from the “Global South” score negatively in the ranking.

**Figure 1.16**  
**Ukrainian citizens’ views on whose rules they would prefer to live by, November 2022, percent**

Would you rather live in a world with international rules shaped mostly by...?

- Europe
- US
- Economically developing countries
- China
- Russia
- Don't know/refusal



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



Figure 1.17

Ukrainians evaluating whether they should carry on fighting or surrender in different scenarios, November 2022, percent

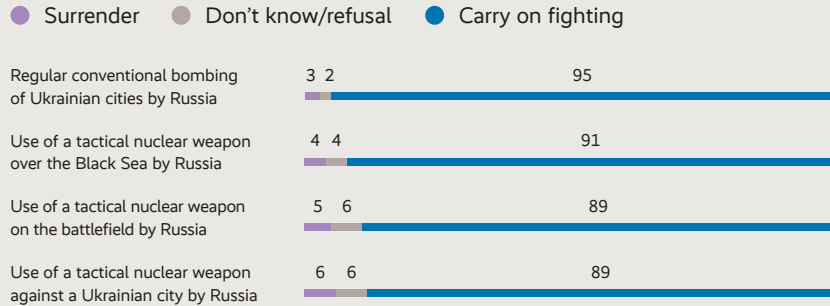
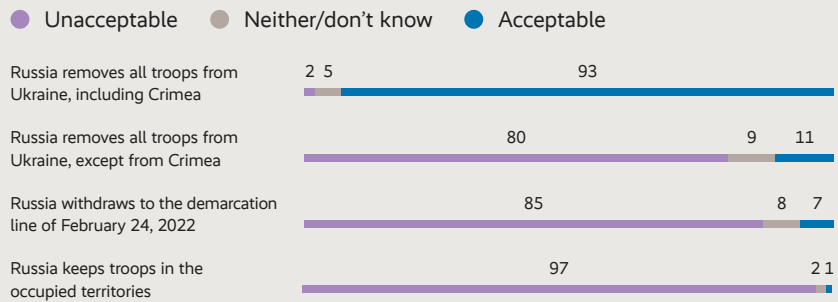
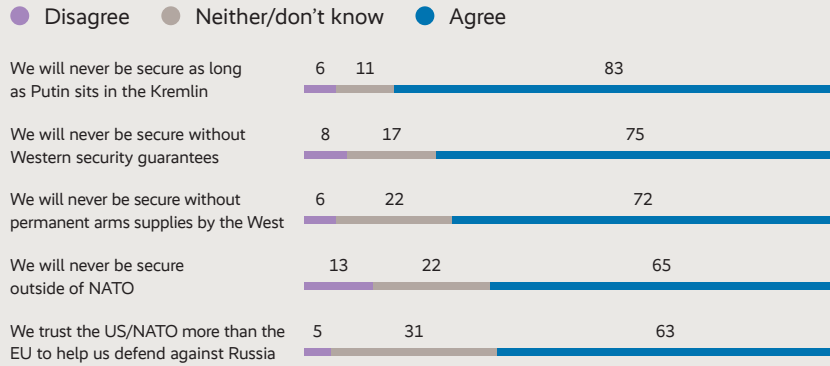


Figure 1.18

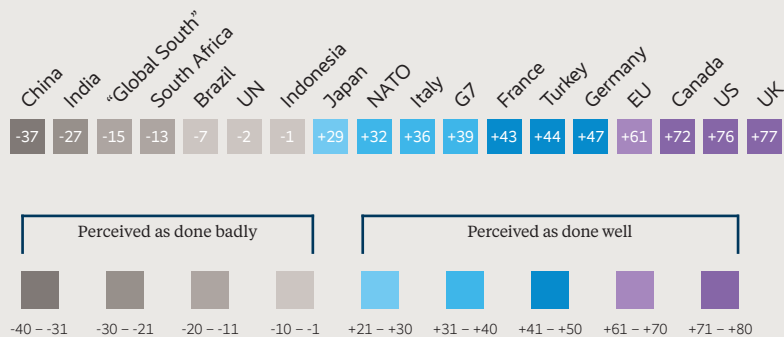
Ukrainian citizens' views on acceptable ceasefire terms, November 2022, percent



**Figure 1.19**  
**Ukrainian citizens' views on security arrangements after the war, November 2022, percent**



**Figure 1.20**  
**Ukrainian evaluation of the response to Russia's invasion of Ukraine of different countries and organizations, share saying the country or organization has "done well" minus share saying it has "done badly," November 2022, percent**



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





# List of Figures

Possible deviations from a total of 100 percent in visualized data result from rounding.

## Munich Security Index 2023

All illustrations and data in this section are based on the survey conducted by Kekst CNC. For the detailed method underpinning the index, see pages 40-41.

### Explaining the Index

1. “Energy supply disruption” was not yet included in previous editions of the index. The Munich Security Index 2021 and the Munich Security Index 2022 thus covered 31 risks.
2. The answer scale is reversed to account for the natural direction of time. More imminent being sooner is closer on our answer scale and less imminent being later is further away on our answer scale, but we in fact want to give a higher score to risks that are more imminent – hence we reverse.
3. The answer scale is reversed because higher answer scores for each of the five inputs should be associated with more serious risk. Without rescaling, it is exactly the reverse: high answer scores are associated with high risk preparedness and thus with less serious risk.

### 1.14 Citizens’ perceptions of other countries, share saying country is an ally minus share saying country is a threat, October–November 2022, 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).

### 1.15 Perceptions of other countries as threats or allies, change between November 2021 and October–November 2022, group average

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’].” “Global” comprises all 12 countries surveyed, except Ukraine, which was not polled in the last round of the index. “G7” comprises Canada, France, Germany, Italy, Japan, the UK, and the US. “BICS” comprises Brazil, India, China, and South Africa. Fieldwork for the previous Munich Security Index, published in the Munich Security Report 2022 and used as a reference point here, took place in November 2021.

## Spotlight Ukraine

### 1.16 Ukrainian citizens' views on whose rules they would prefer to live by, November 2022, percent

Data and illustration provided to the Munich Security Conference by Kekst CNC. In answer to the question “Would you rather live in a world with international rules shaped mostly by...?” respondents were given the following options: “Europe,” “US,” “economically developing countries, such as countries in Africa (often known as the ‘Global South’),” “China,” “Russia,” and “don’t know.”

### 1.17 Ukrainians evaluating whether they should carry on fighting or surrender in different scenarios, November 2022, percent

Data and illustration provided to the Munich Security Conference by Kekst CNC. In answer to the question “In the following circumstances, do you think Ukraine should carry on fighting or surrender?” respondents were given the following options: “carry on fighting,” “surrender,” and “don’t know.”

### 1.18 Ukrainian citizens' views on acceptable ceasefire terms, November 2022, percent

Data and illustration provided to the Munich Security Conference by Kekst CNC. In answer to the question “How acceptable would the following terms be for a ceasefire between Ukraine and Russia?” respondents were given the following options: “completely acceptable,” “somewhat acceptable,” “neither acceptable nor unacceptable,” “somewhat unacceptable,” “completely unacceptable,” and “don’t know.” Figures shown here combine the net responses for acceptable and unacceptable, with the gray area representing the rest.

### 1.19 Ukrainian citizens' views on security arrangements after the war, November 2022, percent

Data and illustration provided to the Munich Security Conference by Kekst CNC. In answer to the question “Do you agree or disagree with the following ...?” respondents were given the following options: “strongly agree,” “tend to agree,” “neither agree nor disagree,” “tend to disagree,” “strongly disagree,” and “don’t know.” Figures shown here combine the net responses agreeing and disagreeing, with the gray area representing the rest.

### 1.20 Ukrainian evaluation of the response to Russia's invasion of Ukraine of different countries and organizations, share saying the country or organization has “done well” minus share saying it has “done badly,” November 2022, percent

Data and illustration provided to the Munich Security Conference by Kekst CNC. In answer to the question “Thinking about the response to Russia invading Ukraine how do you think the following countries and organizations have done in their response to Russia?” respondents were given the options “very well,” “quite well,” “neither well nor badly,” “quite badly,” “very badly,” and “don’t know.” Figures shown are the net of the total percentage for “well” minus the total percentage for “badly.”