Turning the Tide
Unlearning Helplessness

Munich Security Report 2022

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Foreword by Ambassador Wolfgang Ischinger, Chairman of the Munich Security Conference

Wolfgang Ischinger

Dear reader,

In the 14 years that I have chaired the Munich Security Conference, security challenges have grown into a rising tide of mutually reinforcing crises. There is war in Europe, and there is now the threat of a major military conflict. The fight against Covid-19 is far from over. And environmental disasters have harshly reminded the world that the threat posed by climate change is real and grave. Meanwhile, the trend of democratic backsliding continues. It is thus not surprising that in Europe and beyond, a sense of helplessness seems to be mounting.

Collective helplessness and how we can overcome it is at the core of the Munich Security Report 2022. As documented in the second edition of our Munich Security Index – an exclusive annual index of risk perceptions that we developed together with our partner Kekst CNC – the perceived loss of the capacity to maintain control over global threats is widespread among G7 and BRICS nations.

In two dimensions, this perceived lack of control is particularly palpable – and its consequences especially detrimental. One context is Europe. Despite its significant economic power, Europe often seems to have lost faith in its ability to shape global events. 19 years ago, three EU member states initiated negotiations that eventually led to the Iran nuclear deal. Today, European initiatives for addressing shared global threats are rare. As if dominated by a sense of impotence, Europe appears like a political dwarf in the global arena.

The other context is multilateral cooperation. Rather than being used and strengthened, institutions like the United Nations Security Council, the World Trade Organization, and the World Health Organization have been neglected, circumvented, and even undermined. International organizations are no longer perceived as essential to influencing positive change or creating added value. This is a huge mistake. If we squander the most powerful instruments for maintaining a rules-based international order and for fighting global security threats, our helplessness is truly self-inflicted.

This is why this year, the Munich Security Conference will focus on how we can overcome collective helplessness and the rising tide of crises. Resignation is not an option. For "unlearning helplessness," the Munich Security Conference offers the perfect platform – physical or virtual.

As I hand over the conference chairmanship to Christoph Heusgen, I would like to thank all those friends, sponsors, and partners who have helped me develop the Munich Security Conference into an indispensable global platform over the last 14 years. None of this would have been possible without the young, dynamic, and growing Munich Security Conference team, to which I feel deeply indebted.

Executive Summary

2021 was clearly not a year for geopolitical optimism. Almost every month, a new crisis dominated the news, contributing to a sense that this mounting tide of crises threatens to overwhelm us.

Against this backdrop, it is not surprising that in Europe and beyond, concern about a growing loss of control is prevalent (Chapter 1). In fact, findings from the Munich Security Index 2022 not only reflect the high level of risk perceived by respondents in the G7 and BRICS countries; they also suggest the emergence of "collective helplessness" in the face of a plethora of crises that reinforce each other. Just like people can suffer from "learned helplessness" – a psychological term describing the feeling that nothing one does can effect positive change – societies, too, may come to believe that they are unable to get a grip on the challenges they are facing. Whether it is the seemingly endless pandemic, the increasingly tangible threat of climate change, the vexing vulnerabilities of an interconnected world, or increasing geopolitical tensions, all these challenges contribute to a feeling of a loss of control. Liberal democracies appear to feel particularly overwhelmed. This perception is highly dangerous because it can turn into a self-fulfilling prophecy. Societies that have concluded that they cannot solve humankind's most challenging problems might no longer even try to turn the tide. Will our stressed and overburdened societies end up accepting what they see as their fate, although they have the tools and resources to change it?

Unfortunately, 2021 overall did not alleviate these concerns. With the chaotic withdrawal from Afghanistan, for instance, the past year has also reinvigorated a debate about what international interventions are able to realistically accomplish. In light of the limited achievements of the United States and its partners in Afghanistan (Chapter 2), hard questions arise about the West's ability to build capable, legitimate state structures and promote stability elsewhere in the world. As Afghanistan now finds itself on the brink of the world's worst humanitarian crisis, with civil liberties being severely restricted under Taliban rule, the investments of two decades of external intervention are at risk. While the West has ended an "endless war," people in Afghanistan are looking toward an uncertain future.

The developments in Afghanistan have also spurred a debate on European engagement in Mali and the Sahel region (Chapter 3). Even though this region has seen a massive increase in peacebuilding activities since 2013, the security situation has continuously deteriorated. The Malian government has been an exceedingly difficult partner for the international community – even before it entered talks with a Russian mercenary group. And increasing levels of violence in Mali and neighboring states have made it difficult for external actors to address the root causes of the problems afflicting the region – among these are poor development, human rights abuses, and rampant corruption.

The Sahel is not the only conflict region where the headwinds for international stabilization efforts are growing stronger. After a period of democratization and hope for regional reconciliation in the Horn of Africa and the Arabian Gulf, a profound destabilization is now evident (Chapter 4). Since November 2020, civil war engulfs Ethiopia's northern Tigray region, causing a large-scale humanitarian emergency. Because the Red Sea region is a crucial choke point of international trade, an important security link between the Mediterranean, the Middle East, and the Indo-Pacific, plus a major hub for extremists, the ripple effects of escalating conflicts will likely be felt far beyond the region. In that regard, the situation in the Horn of Africa demonstrates that conflicts around the world are not waiting for the West to draw its lessons from Afghanistan.

At the same time, rising tensions in the Indo-Pacific and Eastern Europe have also raised another type of fear among the transatlantic partners: that of actual war. Nothing illustrates the renewed focus on territorial defense in the West better than the increasingly tense security situation on NATO's eastern flank (Chapter 5). In recent months, Moscow has made it abundantly clear that it is looking for a revision of the European security order. As the Russian draft proposals for new security treaties demonstrate, Russia insists on a "sphere of influence" in its neighborhood, effectively limiting the sovereignty of countries like Ukraine. Russia's rhetorical escalation and military buildup have raised profound security concerns across Europe. While analysts disagree on what President Vladimir Putin's specific goals are, the debate about the basic principles of European security – and how to defend them – will only intensify in the coming months, posing difficult political and military questions to European leaders who are forced to take a stand and reconsider their strategic posture.

In addition to the return of very traditional security concerns, the coronavirus pandemic has relentlessly highlighted societies' vulnerabilities in various

policy areas. Among other things, it has unmasked strong dependencies in the supply chains of critical technologies, as well as gaping inequalities and their detrimental effects on global crisis resilience.

Both the pandemic and recent geopolitical power moves have brought vulnerabilities in the technology sector into focus (Chapter 6). The ongoing global semiconductor supply bottleneck exemplifies what can happen when supply chains depend on "single points of failure" and geopolitically fraught supply sources. Due to the strategic importance of tech supply chains, the risk to them is only growing in an era of systemic competition. This realization has spurred a rethink on industrial policy in the US, Europe, and other high-tech economies. Meanwhile, China has had a head start as its comprehensive approach to economic planning has long focused on boosting its indigenous tech sector. However, approaches based on "onshoring," the shifting of supply from foreign soil to within national borders, are clearly limited. Accordingly, the focus for policymakers has shifted to achieving supply chain cooperation between like-minded partners to collectively become more resilient.

Covid-19 has brutally exposed inequalities that exist within and across states (Chapter 7). Pandemics are not the only grave threat facing humanity today that is inseparably tied to global divides. Climate change is, too. These threats to our health and habitats deepen existing disparities; and they will also defy successful containment if current levels of inequality persist. As long as the coronavirus rages on in other parts of the world, no country will be safe from the Covid-19 pandemic. And if less developed countries lack the resources to embark on low-carbon pathways, global warming cannot be effectively limited. It is becoming increasingly clear that improving global resilience in the face of present and future threats requires renewing social contracts, both within and between countries. Getting back on track to reach the UN Sustainable Development Goals would be the first important step.

Despite these and the many other challenges on the agenda of this year's Munich Security Conference, there is still good reason to believe that "unlearning helplessness" is possible. For this, transatlantic leaders need to revive the optimism and momentum palpable in the early days of the Biden administration and demonstrate that both democracy as a system and alliances based on liberal values can deliver for their states' citizens and the world at large. Collectively, they have the chance to turn the tide. Individually they risk being swept away.

1 Turning the Tide – Unlearning Helplessness

Is the world at the edge of an abyss? Is humanity losing control over its own fate? What can be done to overcome a widespread feeling of helplessness in the face of crises that reinforce each other? Are liberal democracies – and the transatlantic partners in particular – able to unlearn helplessness and turn the tide of mounting crises?

Turning the Tide – Unlearning Helplessness

Tobias Bunde

A violent mob of Trump supporters – encouraged by the outgoing president – storming the Capitol, the symbol of US democracy. New variants of the coronavirus and additional waves of contagion hitting humankind and shattering hopes that the pandemic could end anytime soon. Wildfires and heatwaves across the globe demonstrating that climate change is happening here and now. NATO forces leaving Afghanistan and the Taliban immediately making a comeback, casting doubt on two-decades' worth of massive investments. Escalating tensions and a renewed focus on competing spheres of influence in the Indo-Pacific and Eastern Europe. Humanitarian crises taking longer and becoming more difficult to alleviate. 2021 was clearly not a year for geopolitical optimism.

These developments would be less concerning if they did not come on top of general trends of decaying order, rising geopolitical competition, ecological overload, and a sense of "Westlessness" – developments that have shaped the debates at the Munich Security Conference in recent years.[2] For some observers, we are living in a "new era of successive and interconnected disruptions,"[3] in which a permanent sense of crisis has become the "new normal." The notion of the "polycrisis" – a term which former President of the European Commission Jean-Claude Juncker invented to describe the set of interlocking crises plaguing the European Union, "feed[ing] each other, creating a sense of doubt and uncertainty in the minds of our people"[4] – now seems to be a fitting description of the global situation. Who could be blamed for feeling overwhelmed by this rising tide of crises?

"We are on the edge of an abyss – and moving in the wrong direction. Our world has never been more threatened. Or more divided. We face the greatest cascade of crises in our lifetimes."[1]

António Guterres,
UN Secretary-General,
UN General Assembly,
September 21, 2021

The Munich Security Index 2022 reflects the high level of risk perceived by respondents in the G7 and BRICS countries. In almost all these countries, the people polled for this edition of the Munich Security Index have become even more concerned overall than in the poll for the previous edition. Whether it is mass migration, food shortages, climate change, extreme weather events, divisions among Western powers, Russia, destruction of natural habitats, political polarization, rising inequality, racism and other discrimination, rapid change to their country's culture, trade wars, the use of nuclear weapons by an aggressor, cyberattacks, or disinformation campaigns, risk perceptions are up almost everywhere (Figure 1.7).[5]

In the face of such challenges, liberal democracies appear particularly overwhelmed and helpless. In the eyes of many, politicians seem far from getting a grip on these challenges and steering the world away from catastrophe. What is more, the seemingly endless series of crises threatens to eat away at the public's confidence that they and their political leaders can shape their future. While autocratic governments often project confidence and decisiveness, liberal-democratic countries sometimes appear paralyzed. Turning the tide of crises looks like an ever more difficult task. Too often, it seems as if, in the famous words of William Butler Yeats, "the best lack all conviction, while the worst are full of passionate intensity."[6]

Collective Helplessness

In the 1960s, psychologists Martin Seligman and Steven Maier first described a phenomenon they referred to as "learned helplessness."[7] In an experiment, dogs were first conditioned to expect an electric shock after hearing a tone.[8] But when, in a second setting, they had the chance to escape the shock by jumping over a little barrier, the dogs, to the surprise of the scientists, just lay down and endured the shock. They looked helpless. The animals, Seligman and Maier reasoned, had learned that no matter what they did, they could not control their fate. So they just gave up – even when they had the chance to escape.[9]

Research on "learned helplessness" was soon directed toward humans. Seligman and his colleagues were reminded of symptoms in depressed people, suspecting that clinical depression is the result of a real or perceived lack of control over the outcome of a situation. A person who comes to believe that nothing they do will make any difference is likely to show symptoms of stress, apathy, or fatalism, refrain from difficult voluntary actions, and stick to unhealthy patterns of behavior.[10]

While concepts like "learned helplessness" and "personal control" obviously relate to individuals, they may be usefully extended to groups as well.[12] Although collective control and helplessness are certainly more difficult to grasp than their individual analogues, the general principle may "travel" from the individual to the collective level.[13] After all, smaller or larger groups of people, perhaps even whole societies, may collectively believe that they are unable to effect positive change and, as a result, give up.

In this sense, a form of "collective helplessness," resulting from a series of crises and the apparent inability to cope with them, is emerging. One of the most striking facts of the Munich Security Index 2021, published in

"[T]he most important element of our security is not a particular deterrence measure, a specific weapons system, or an arms control treaty. The most important element is our mental posture."[11]

Kersti Kaljulaid, then–Estonian President, Lennart Meri Conference, September 3, 2021

"Being in permanent crisis management mode has sometimes weakened our capacity to address transversal, longer-term issues that should be at the center of our foreign policy [...]."[14]

Josep Borrell, EU High Representative for Foreign Affairs and Security Policy, EEAS blog post, December 27, 2021

June 2021, was the stark differences in the general levels of "preparedness" we could observe when comparing the respondents in the world's most powerful countries – the United States, China, and Russia – to the respondents in other countries. Particularly in the European G7 countries polled, we were surprised to see such a high level of concern among the population that their countries were not prepared to deal with a whole range of risks.[15]

For the Munich Security Index 2022, we thus asked our respondents directly about their sense of helplessness and control in the face of global events. Those who say they feel helpless in the face of global events are the largest group in all countries polled (Figure 1.1). In all but four countries, the

Figure 1.1

Citizens' perceptions of helplessness in the face of global events, November 2021, percent

Do you agree or disagree with the following?
I feel helpless in the face of global events.

	Disagree	Neither/don't know	Agree
China	27	37	37
Russia	17	35	48
Germany	15	36	49
UK	11	40	49
US	16	34	50
Canada	14	35	51
Japan	9	34	57
France	11	30	59
Italy	10	29	61
South Africa	11	26	63
Brazil	12	24	64
India	12	20	69
Non-democracy	22	36	42
Democracy	12	31	57
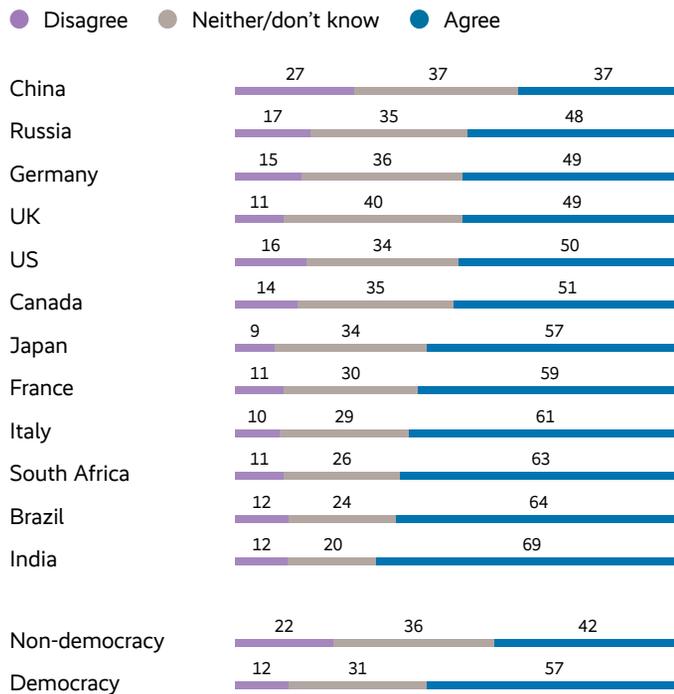
Data and illustration: Kekst CNC,
commissioned by the Munich Security Conference

"helpless" are in the absolute majority. In South Africa, Brazil, and India, this group accounts for about two thirds of the population. China is the only country in which more than a quarter (27 percent) disagreed with the statement. In all the other countries surveyed, less than a fifth of the populations, often only about one in ten people, say they do not feel helpless.

When asked whether they thought their country has no control over global events, a similar pattern emerged – even if the figures are slightly lower in general. Majorities or pluralities of the respondents in all countries surveyed agree that their countries have no control over global events (Figure 1.2).

Figure 1.2
Citizens' views on their country's control over global events, November 2021, percent
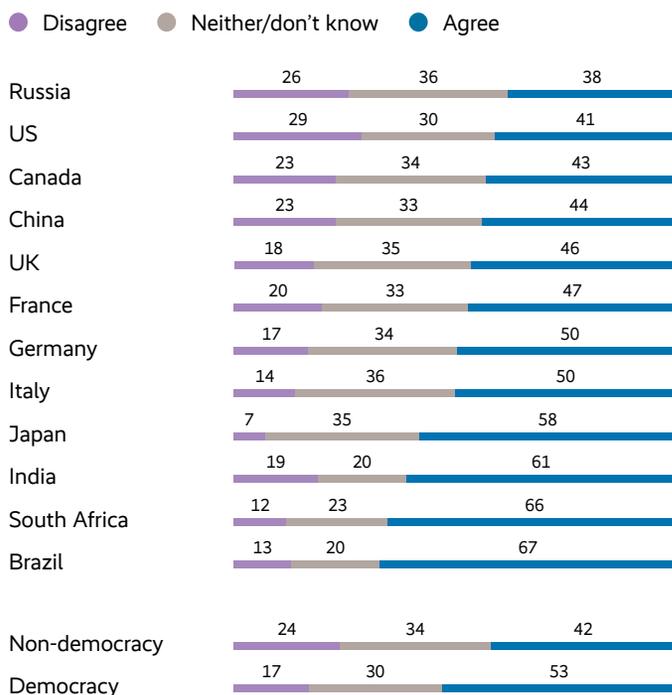
● Disagree ● Neither/don't know ● Agree

Do you agree or disagree with the following? My country has no control over global events.

	Disagree	Neither/don't know	Agree
Russia	26	36	38
US	29	30	41
Canada	23	34	43
China	23	33	44
UK	18	35	46
France	20	33	47
Germany	17	34	50
Italy	14	36	50
Japan	7	35	58
India	19	20	61
South Africa	12	23	66
Brazil	13	20	67
Non-democracy	24	34	42
Democracy	17	30	53

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

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One might dismiss these staggering findings as unsurprising. After all, why should ordinary people feel any different? Why should they believe that their countries have control over global events? Yet the promise of control, even if an illusion, is a crucial element of modernity. Against this background, the widespread perception of a loss of control and the longing to get it back are key political themes of our time. It is no coincidence that "take back control," "America first," "strategic autonomy," or "European sovereignty" are some of the key political catchphrases of the present. As the late sociologist Zygmunt Bauman noted, "insecurity and uncertainty, in their turn, are born of a sense of impotence: we seem no longer to be in control, whether singly, severally or collectively, of the affairs of our communities, just as we are not in control of the affairs of the planet."[16]

The danger is that this feeling of crisis fatigue and loss of control, resulting in perceived collective helplessness, may prevent the world from addressing the most important crises before it is too late. Will our societies, overwhelmed by a tide of crises, end up accepting their fate, although we have the tools and resources to change it? In several policy fields, collective helplessness in this sense is already visible.

The Covid-19 Pandemic: Can It Be Overcome?

For two years now, the international community has been overwhelmed and put to a severe stress test by the seemingly endless Covid-19 pandemic. In most countries surveyed, about half of the respondents believe that the risk posed by the pandemic will increase this year (Figure 1.13). The results of the stress test are not encouraging. To begin with, the national political responses in most countries, even in those with the necessary capabilities and resources, have been suboptimal.[17] To many, the political management of the pandemic is a story of repeatedly making the same mistakes: "In this time of genuine crisis, governments too often abdicated responsibility, ignored scientfic advice, did not cooperate or communicate effectively, and consequently failed to protect the health and welfare of their citizens."[18] With societies and their leaders often apparently unable or unwilling to learn, vocal minorities distrusting vaccines and their governments, and restrictions on people's everyday lives, the already prevalent emotional distress has reached new heights.[19] It is no wonder that "crisis fatigue" is now a widespread phenomenon discussed by psychologists.[20] Except for two outliers – China and India, where the population overwhelmingly feels in control – in all countries surveyed for the Munich Security Index, more people feel helpless in the face of pandemic diseases, often by a wide margin (Figure 1.3).

Figure 1.3

Citizens' perceptions of pandemic diseases, share saying they feel "in control" minus share saying they feel "helpless," November 2021, percent

Country	Value
China	59
India	48
US	-2
Japan	-7
Brazil	-14
South Africa	-16
UK	-17
Russia	-18
Canada	-21
France	-34
Italy	-36
Germany	-42

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

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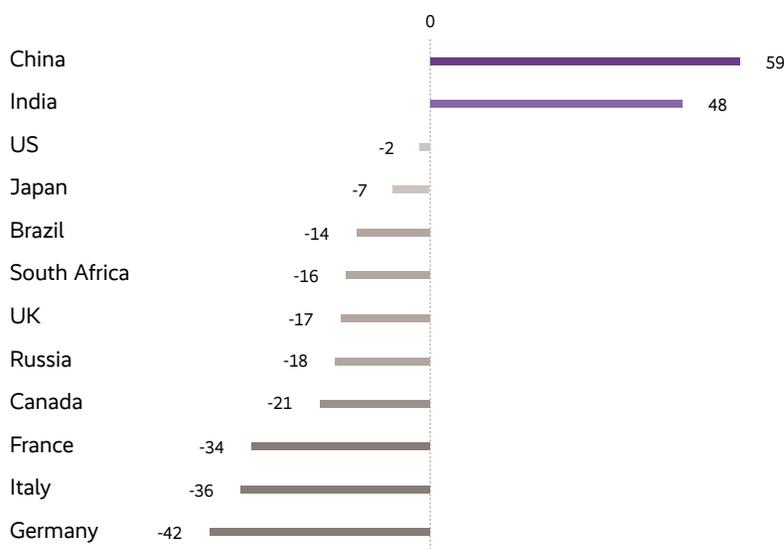
Moreover, on the international level, the reaction to the pandemic has been even more underwhelming, as Adam Tooze writes: "The world's decision-makers have given us a staggering demonstration of their collective inability to grasp what it would actually mean to govern the deeply globalized and interconnected world they have created."[21] Where multilateral coordination was needed, unilateral action too often prevailed. Where quick action was necessary, slow decision-making procedures stood in the way. Where a global approach was called for, national egotism had the upper hand.[22] The fact that the global pandemic, a quintessential common threat to humanity, did not help bring about more global solutions illustrates the sorry state of global governance. Against a background of geopolitical competition, the pandemic only seemed to widen political divides, fuel tensions, and exacerbate inequalities (Chapter 7) – ushering in what a Special Edition of the Munich Security Report described as the "polypandemic."[23]

"The longer it takes to suppress the virus everywhere, the more opportunity it has to change in ways that could make vaccines less effective – an opportunity to mutate. We could end up back at square one."[24]

Tedros Adhanom Ghebreyesus, WHO Director-General, MSC Special Edition, February 19, 2021

As many experts have stressed from the beginning of the pandemic, it would be in the self-interest of the most powerful to develop an effective global vaccination campaign, as ever-new variants resulting from huge volumes of infection threaten both public health and economic recovery everywhere. Considering a death toll of about 20 million people already, plus ten trillion US dollars of spending for economic recovery,[25] the production costs for vaccines for everyone are negligible.[26] Yet the COVAX vaccine coalition has missed even its initial goal of distributing about 1.9 billion doses for 2021 by a staggering 1.5 billon.[27] Whereas at the beginning of January, more than two-thirds of the population in high-income countries had received at least one dose, the same was only true for fewer than one in ten people in low-income countries.[28] It is neither surprising nor illegitimate that high-income countries have prioritized the immediate protection of their own populations. Rich societies, themselves overwhelmed, apparently feel unable to muster the resources to help others – perhaps because they feel they cannot even help themselves in this seemingly never-ending pandemic. "Pandemic fatigue," defined by the World Health Organization as "demotivation to follow recommended protective behaviors,"[29] can be observed not only in daily life – it is also present when it comes to global "protective behaviors." If global vaccination efforts lag behind, the emergence of potentially more contagious and lethal variants remains a top risk.[30] Now, entering the third year of the pandemic, critics fear the world is repeating the same mistakes – both on the national and international level.[31]

Climate Change: Can It Still Be Mitigated?

As the new Munich Security Index (Figure 1.6) shows, people around the world are growing increasingly concerned about the impacts of climate change. Extreme weather events such as floods in Germany and the province of British Columbia in Canada, extended wildfires in Siberia, Greece, and India, as well as heatwaves and droughts in the US and Brazil have driven home the message that the effects are already here – and will increase for decades.[32] In a report by the Intergovernmental Panel on Climate Change, climate scientists concluded that climate change was "widespread, rapid, and intensifying." As the scientists put it, "unless there are immediate, rapid, and large-scale reductions in greenhouse gas emissions, limiting warming to close to 1.5°C or even 2°C will be beyond reach."[33] According to UN Secretary-General António Guterres, the report was "a code red for humanity."[34] Still, the international community appears to replicate the main mistakes of the early response to the coronavirus pandemic: what is done is too little, too late.

"We are seeing new types of order emerge – and they are far from encouraging. We are living in a world without any real global leadership, and at the same time, a world in which we can only tackle unprecedented challenges to humanity such as the climate crisis by working together."[35]

Annalena Baerbock, German Foreign Minister, inauguration at the Federal Foreign Office, December 8, 2021

As numerous surveys have found, people in the industrialized world are not sure whether actions by the international community will be able to reduce the effects of global warming.[36] For instance, the November edition of *ARD-DeutschlandTREND,* a monthly opinion poll conducted for a German public TV broadcaster, found that only a tiny fraction – two percent – of respondents were fully convinced that the international community can successfully cope with the problems resulting from climate change. While 12 percent said that they were somewhat convinced, the vast majority said they were rather not convinced (56 percent) or not convinced at all (26 percent).[37] Data from the Munich Security Index underscores this pessimism. In Italy (60 percent), Brazil (56 percent), Germany and France (both 54 percent), and Japan (50 percent),

Figure 1.4

Citizens' trust in other countries' climate commitments, share saying other countries cannot be trusted to meet their climate change obligations, February/March and November 2021, percent

● February/March 2021   ● November 2021
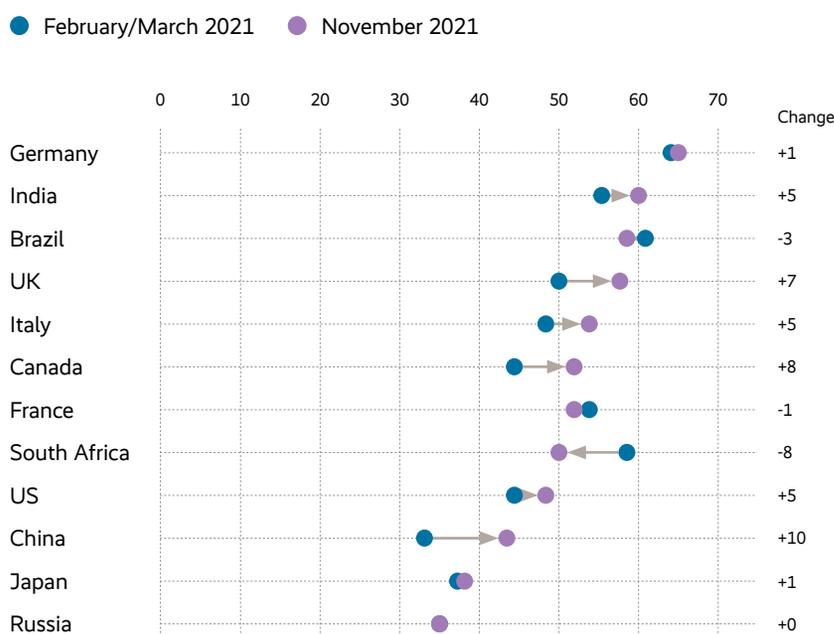
Data and illustration: Kekst CNC,
commissioned by the Munich Security Conference

majorities feel somewhat helpless or very helpless in the face of climate change. In Canada and South Africa (both 47 percent), the United Kingdom (43 percent), Russia (44 percent), and the US (43 percent), those who feel helpless still outnumber those feeling in control. Again, only in China and India are there more people who feel very in control or somewhat in control (63 percent and 59 percent, respectively). Moreover, compared to the Munich Security Index 2021, respondents are now overall even more skeptical of whether other countries can be trusted to keep their climate commitments (Figure 1.4).

Unfortunately, the belief in the seeming inevitability of climate change, the perceived lack of political control, and the widespread (and increasing) skepticism of whether others will do their share make it even more difficult to solve what is already "the greatest collective-action challenge we have ever faced."[38]

Vulnerabilities in an Interdependent World: Can the Risk Be Managed?

For a long time, people believed that increasing levels of economic global-ization and interdependence would lead to global stability, prosperity, and perhaps even to the universal adoption of liberal democracy and market-based economies. This optimism about the benefits of globalization has given way to a more nuanced view that focuses on the long-neglected dark sides of interdependence. As Mark Leonard puts it, "the core feature of our interconnected planet is the loss of control."[39]

"You no longer need armies and missiles to cause mass damage. You can paralyze industrial plants, city administrations, and hospitals – all you need is your laptop. You can disrupt entire elections with a smartphone and an internet connection."[44]

Ursula von der Leyen, President of the European Commission, State of the Union address, September 15, 2021

To begin with, many members of the middle class in the transatlantic community feel subject to uncontrollable forces that threaten their jobs and their futures.[40] As a report by the Bertelsmann Stiftung put it at the beginning of the pandemic, "the gains of globalization have become less obvious," while "the pains of globalization have come to the fore."[41] Here, too, the pandemic has served as a catalyst, showcasing the enormous dependence on global supply chains, even for vital goods such as medicine or masks.[42] In all G7 countries, which were surveyed for the Munich Security Index, only ten percent or less disagree with the statement that their country is too dependent on international supply chains.[43] There are rising concerns about ruptures in supply chains for crucial goods such as semiconductors (Chapter 6), perhaps caused by war or the closing of key sea routes.

Moreover, interdependence has not eliminated conflict. Instead, increased connectivity has paved the way toward an "age of unpeace."[45] This age is characterized by the increasingly ubiquitous exploitation of vulnerabilities, a phenomenon political scientists Henry Farrell and Abraham Newman describe as the "weaponization of interdependence."[46] Networks that connect people, societies, and states – from the global banking system to supply chains to the internet – have become key arenas for geopolitical competition. According to analysts, "the world is heading for a new era of permanent low-level conflict, often unnoticed, undeclared, and unending."[47] In the cyberrealm, we have arguably already entered "the age of perpetual cyber conflict."[48] Such an interconnected world, in which connectivity can be used against people at any time, may further nurture a sense of helplessness that is most pronounced in liberal democracies. After all, while autocratic governments and illiberal movements excel at exploiting our open and interconnected global system, the openness that characterizes liberal democracies has become a liability, putting liberal democracies at a disadvantage in the struggle surrounding the future international order.[49]

Geopolitical Rivalries: Can They Be Contained?

Although strategic competition has so far been restricted to "measures short of war,"[50] increasing geopolitical rivalries may spiral out of control in the future. Not long ago, public intellectuals trumpeted the general decline of violence and argued that humanity was "winning the war on war."[51] But while the world has indeed enjoyed a rare period of extended peace since 1945, at least if defined as the absence of great-power war, the belief that an all-out war involving the most powerful states is all but impossible may even encourage more risky behavior and trigger an escalation that can no longer be contained.[52] Conflict researchers consider it "not unlikely at all that another war that would surpass the two World Wars in lethality will happen in your lifetime."[53]

In the past year, tensions in Eastern Europe (Chapter 5) and the Indo-Pacific have clearly increased, prompting analysts to warn of the increased risk of escalation in these theaters.[55] While hotspots like Ukraine or Taiwan (Figure 1.12) have received particular attention, it seems as if the leading powers have generally entered a spiral of ever-worsening relations. The US, China, and Russia have all begun to not only ramp up their conventional capabilities but also invest in their nuclear forces. While the Trump administration warned that it knew "how to spend the adversary into oblivion,"[56] the Chinese government has responded by accelerating the pace

"Our first shared responsibility is to maintain international peace and security. And it is in danger when power games are heightened, when bloc mentalities reappear, when our regulatory frameworks collapse, when attempts at fait accompli policies increase."[54]

Jean-Yves Le Drian, French Foreign Minister, UN General Assembly, September 27, 2021

of its nuclear expansion, most prominently illustrated by the building of three new intercontinental ballistic missile silo fields.[57]

At the same time, the institutions and frameworks intended to heighten transparency and limit escalation continue to unravel.[58] Except for the important extension of the New START agreement until 2026, agreed upon in February 2021,[59] recent years have seen an erosion of too many key arms control agreements and "an extraordinary disregard for the potential of an accidental nuclear war."[60] The US and China have yet to enter into meaningful discussions about mutual vulnerability and arms control.[61] For some, great-power war in this "new cold war" constellation, even including nuclear weapons, is already more likely than in the US-Soviet confrontation of the 20th century.[62] The perception that things may be getting out of control is illustrated by the "Doomsday Clock," set by the *Bulletin of the Atomic Scientists* and described as a metaphor "that warns the public about how close we are to destroying our world with dangerous technologies of our own making."[63] Since 2020, the clock has been set at 100 seconds to midnight – the closest it has ever been. Again, as the clock metaphor implies, the prevailing mood is that these developments are inevitable – even if that is clearly not the case. But if too many believe in the inevitability of increased confrontation among the world's great powers and the futility of arms control or great-power management, the likelihood of self-fulfilling prophecies increases.

Humanitarian Crises and Violent Conflict: Can They Be Alleviated?

Seen from a different angle, a renewed focus on great-power competition could also have far-reaching implications for many other "smaller" conflicts in the world. Those conflicts risk either being viewed through the increasingly dominant lens of strategic competition or fading from global attention because priorities of the world's leading powers are shifting. This risk is even more significant, as the past ten years have seen a clear increase of (mostly intrastate and internationalized intrastate) violent conflicts,[64] often resulting in large-scale human suffering. External support is needed to alleviate the increasing number of humanitarian crises. Data collected by the UN Office for the Coordination of Humanitarian Affairs (OCHA) shows that the average duration of a humanitarian crisis increased from less than two years to almost seven years in the past quarter century.[65] According to the 2022 Emergency Watchlist compiled by the International Rescue Committee (IRC), more than a quarter billion people today need humanitarian assistance, an increase of 63 percent within two years.[66] As a result, the humanitarian system, too, is overwhelmed. David Miliband, President of the

"[T]he humanitarian system will simply not be able to keep pace. Political leaders are mistaken if they think humanitarian organizations can continue to manage the consequences of crises [that] already are more prevalent, protracted, expensive, and, in relation to the needs, less well-funded than they were twenty-five years ago."[69]

Marc Lowcock, then–Under-Secretary-General for Humanitarian Affairs, April 29, 2021

IRC, speaks of a "near-permanent crisis" that amounts to a "system failure."[67] Yet it seems as if there is no one willing to engage in serious repair work or come up with a better system, even though experts believe that increased but moderate investment in risk reduction and prevention will protect lives and save money in the long run.[68]

Although Western countries are just beginning to distill lessons from the interventions of the past three decades (Chapters 2, 3, and 4), it is hard to deny that many interventions and state-building activities have produced dismal results, raising the question of whether outside actors should intervene at all.[70] As US President Biden put it, the decision to leave Afghanistan to focus on other threats was "not just about Afghanistan" but "about ending an era of major military operations to remake other countries."[71] Yet reckoning with the fact that bold visions of building states turned out to be illusory could have adverse effects if it were to lead to a general Western retreat from violent conflicts.[72] There is a clear risk that the justified disappointments with some resource-intensive missions will translate into a post-interventionist age, throwing the "peacekeeping" baby out with the "failed interventions" bathwater. While the "maximalist approach" has failed,[73] research has shown that (even small-scale) peacekeeping does work.[74] An increasing retreat from the world would thus amount to another case of "learned helplessness," based on "over-learning" the lessons of the recent past.

The Rising "Illiberal Tide": Can Liberal Democracy Still Prevail?

From a transatlantic point of view, the trends described above would be less concerning if there were no crisis of liberal democracy. After all, the combination of strong democracy at home and reliable cooperation among democracies abroad is still the best hope for dealing with these challenges. But as previous Munich Security Conference reports have discussed in more detail, liberal democracies are under significant pressure from both within and without, experiencing what can be called an "illiberal tide."[75] Populist politicians and emboldened illiberal powers are attacking the liberal international order shaped largely by the transatlantic democracies. For years, democracy researchers have described what some call a deepening "democratic recession."[76] According to the Democracy Report 2021 by the V-Dem Institute in Sweden, "the level of democracy enjoyed by the average global citizen in 2020 is down to levels last found around 1990," while the share of the world population living in autocracies has increased from 48 percent in 2010 to 68 percent in 2020.[77] In all democracies surveyed by the Munich Security Index except Canada, more people agree rather than

"We are in the midst of a fundamental debate about the future and direction of our world. We're at an inflection point between those who argue that, given all the challenges we face – from the fourth industrial revolution to a global pandemic – [...] autocracy is the best way forward, [...] and those who understand that democracy is essential – essential to meeting those challenges."[79]

Joe Biden, US President, MSC Special Edition, February 19, 2021

disagree with the statement that democracy was in decline in their country. In the US (49 percent) and France (47 percent), almost half of the population thinks that democracy is in decline, while only about one in ten (nine percent in both cases) strongly disagrees.[78]

While the election of President Biden was greeted with enthusiasm by America's partners, who hoped for the return of the United States as the leader of the community of liberal democracies, many Europeans now worry that the feeling of relief could be short-lived. America may be back, but for how long? America struggling to come to terms with the events of January 6, 2021, has sparked debates about the future of liberal democracy in the US. As two eminent scholars researching democratic decay conclude, "the looming danger is not that the mob will return; it's that mainstream Republicans will 'legally' overturn an election."[80] Indeed, many worry that preparations are well under way.[81] According to Robert Kagan, the US is facing "its greatest political and constitutional crisis since the Civil War."[82] The difficulties that defenders of key democratic principles have in responding to this crisis may lead to frustration, perhaps even a feeling of impotence. Recently, *The Economist* warned that these threats to democracy "must not lead to fatalism."[83] Indeed, the biggest danger is that those defending democracy give up and "simply retreat into complacency."[84]

In Europe, too, concerns about the erosion of the rule of law and freedom of the press in some member states, most notably Hungary and Poland, are running high. Perhaps unsurprisingly given these trends, the perception of these two countries by the populations in other NATO member states covered by the Munich Security Index has deteriorated dramatically (Figure 1.10). Still, it seems that Europe is unable to prevent a further erosion of liberal-democratic principles in its member states. What is more, illiberal movements and parties have been gaining ground in almost all societies. As a result, in many countries, voters who believe in liberal-democratic core principles often do not have a real choice anymore: they have to rally behind one candidate, lest a radical win who is running on a platform that goes against these very principles.[85]

Here, again, the pandemic has served as a catalyst. In many advanced democracies, people feel that their society is now more divided than before.[86] Vocal minorities in many liberal democracies are promoting the rise of modern anti-scientism and a plethora of conspiracy narratives, eroding the common ground that liberal-democratic societies need. German philosopher

Jürgen Habermas, whose early work highlighted the importance of a public sphere for a functioning democracy, has recently warned of its erosion in our societies today, as many citizens, whose views are shaped by and in "filter bubbles" or semipublic spheres, are unable to recognize "fake news."[87] Against this background, critics have emphasized the urgent need to improve "technology governance."[88]

But liberal democracies are struggling to come up with better regulation. "Democracies regularly debate the threats posed by technology," Kenneth Roth concludes in Human Rights Watch's annual report, "but have taken only baby steps to address them."[89] Here, again, it seems that liberal democracies are unable to rein in the forces that they have unleashed. In our age, defined by "the technopolar moment," as Ian Bremmer suggests,[90] the digital sphere seems to be beyond our control – at least for liberal-democratic societies.

Unlearning Helplessness

If it is true that the psychological concept of "learned helplessness," triggered by a seemingly endless series of crises and a perceived lack of control, is a fitting lens that helps us make sense of the state of the world, insights from psychology may also inspire potential therapies. The best therapy for people suffering from "learned helplessness," psychologist Martin Seligman suggests, is "learned optimism."[92] As the Munich Security Index shows, many of the world's liberal democracies indeed need to "relearn" optimism (Figure 1.5).

To unlearn "helplessness," though, people need to again believe that they can effect change in their environment, that they can exert a measure of control over their surroundings. In other words, they need renewed confidence in their own and their government's ability to act.

Obviously, there are different ways to regain and assert control. Even though people living in autocracies may also perceive helplessness, autocratic governments seem more able to project control.[94] Some even believe that the future belongs to the techno-authoritarianism embodied by the Chinese model, where strong leaders with tight control of the population are supposed to make the best decisions for the collective.[95] But while the perceived strength of autocracies may turn out to be shallow, democracies need to prove anew that they provide solutions and make a better, positive case for their system: "Being the least bad system of governance may not be enough

"The battle for the soul of the internet is still being fought, and as of today, we can't say in good faith that the digital environment is as open, as fair, and as safe as we would like it to be."[91]

Margrethe Vestager, Executive Vice-President of the European Commission, speech at the Painel Telebrasil conference, September 21, 2021

"We accept the challenge of our time, and we are confident: we will overcome it; not because we underestimate the problems, but because we have a precise plan for how to solve them and how it can turn out well."[93]

Olaf Scholz, German Chancellor, government statement to the German Bundestag, December 15, 2021

Figure 1.5

Citizens' feelings of optimism regarding their country's progress in the next ten years, share saying they feel "optimistic" minus share saying they feel "pessimistic," different policy areas, November 2021, percent

Economy

Country	Value
China	64
India	58
US	13
Canada	9
Germany	9
Brazil	7
UK	4
South Africa	-3
Italy	-8
France	-16
Russia	-17
Japan	-36

Environmental situation

Country	Value
China	58
India	53
US	14
South Africa	9
UK	6
Brazil	4
Canada	3
Germany	-1
Russia	-11
Italy	-14
France	-23
Japan	-33

Military power

Country	Value
China	70
India	68
Russia	45
US	29
Brazil	21
France	5
UK	4
South Africa	-1
Canada	-1
Italy	-10
Germany	-18
Japan	-24

Political situation

Country	Value
China	65
India	50
Canada	4
Germany	-1
Russia	-3
UK	-3
Brazil	-4
US	-4
South Africa	-14
France	-22
Japan	-25
Italy	-27

Legend: 51–80, 41–50, 31–40, 21–30, 11–20, 0–10, -10–-1, -20–-11, -30–-21, -40–-31, -50–-41

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

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if public despair at democratic leaders' failure to meet today's challenges leads to public indifference about democracy."[96]

If the world's liberal democracies get stuck in collective helplessness, the danger is that illiberal ideas will carry the day and bring about a world in which key liberal values and hhuman rights will suffer more and more. Those who still believe in the superiority of the liberal-democratic model and of multilateral cooperation in a rules-based order thus need to prove that they can deliver. As German Chancellor Olaf Scholz, referring to a recurring theme raised by President Biden, put it at the Bundestag, "the world's liberal democracies must prove anew that they can deliver the better, the fairer, and the more equitable answers to the challenges of the 21st century."[97]

In principle, there is no reason why this should not be possible. If history is any guide, it demonstrates that "democracies can cope with whatever is thrown at them."[98] While the challenges are huge, the answer to the question of whether we will be able to cope with them will, to a significant degree, depend on our self-perception. Do we believe that we are collectively helpless? Or are we willing to use our resources to turn the tide because we can?

After all, despite the rise of autocratic powers, the combined power of the world's liberal democracies is still unmatched today.[99] Moreover, for all the policy areas discussed above, there are strategies, instruments, plans, and ideas available. The "transatlantic to-do list" is also a can-do list.[100] Scientists in Germany, the US, and the UK have developed vaccines in record time that protect against Covid-19, and many organizations are thinking hard about the best way forward to end the pandemic for everyone. At least in theory, the world has everything it needs to do so. And as the response to the pandemic has shown, the world's democracies can still muster enormous resources if need be – so we can surely do the same for addressing climate change as well. Despite the huge obstacles on the path to climate neutrality, scientists believe that the world can turn the tide and limit global warming to 1.5°C. While democracies need broad support in this regard, they can still lead the way in this fight. And regarding a great-power war, while some may believe that one is inevitable, diplomacy can prove them wrong by devising a strategy with the right mix of cooperation and competition.[101] This does not mean giving up on the core elements of the liberal international order, however; a grand strategy of democratic solidarity may show the way.[102] And

despite a lot of angst about the future of democracy, Munich Security Index data also shows that people still believe that democracies are better able to solve the problems of the future than undemocratic countries.[103]

While liberal democracies are under pressure today, they do not have to remain on the defensive. Despite setbacks, the transatlantic partners have no choice but to try to build on the momentum that was on display at the MSC Special Edition a year ago.[104] A loose countermovement against the illiberal tide has already emerged, which focuses on value-based cooperation and democratic resilience.[105] Take initiatives such as the Franco-German project for an "Alliance for Multilateralism"; US President Biden's "Summit for Democracy"; the revitalization of the G7 as a grouping of key actors sharing common values; the renewal of NATO, pronounced brain-dead not long ago; or initiatives in the EU to promote "European sovereignty" in various policy fields. While critics may be right in pointing out the shortcomings of these initiatives, they represent a clear improvement and renewed ambition to rise to the occasion. In this sense, systemic competition does not have to be a bad thing if it spurs liberal democracies to reform, innovate, and renew their cooperation.

The stakes are high – and the obstacles are huge. But no matter how justified, there is no time for indulging in *Weltpolitikschmerz*. Resignation, as German President Frank-Walter Steinmeier put it when addressing the UN General Assembly in September 2021, would be the wrong lesson to draw from "this moment of geopolitical disenchantment."[107] The world's liberal democracies have overcome previous crises; they can do so again by unlearning helplessness. By "acting resolutely instead of merely reacting,"[108] they will have the chance to turn the tide together.

Key Points

1. The past year has not been a year for geopolitical optimism, as several developments have underlined the fragility and instability of the world.

2. Against the backdrop of multiple crises that reinforce each other, liberal-democratic societies in particular seem to be suffering from a form of "collective helplessness." Sensing that they have no control over global events, many people seem to conclude that it will not be possible to solve humanity's most challenging problems.

3. This poses the risk that, even though there are resources, strategies, and instruments available to address the key challenges facing humanity, the world will not be able to do so.

4. While still being the world's best hope, liberal democracies, and the transatlantic partners in particular, need to prove that they have the right answers to today's challenges. Understood as a wake-up call, systemic competition can be a catalyst for reform and innovation, providing us with a chance to turn the tide.
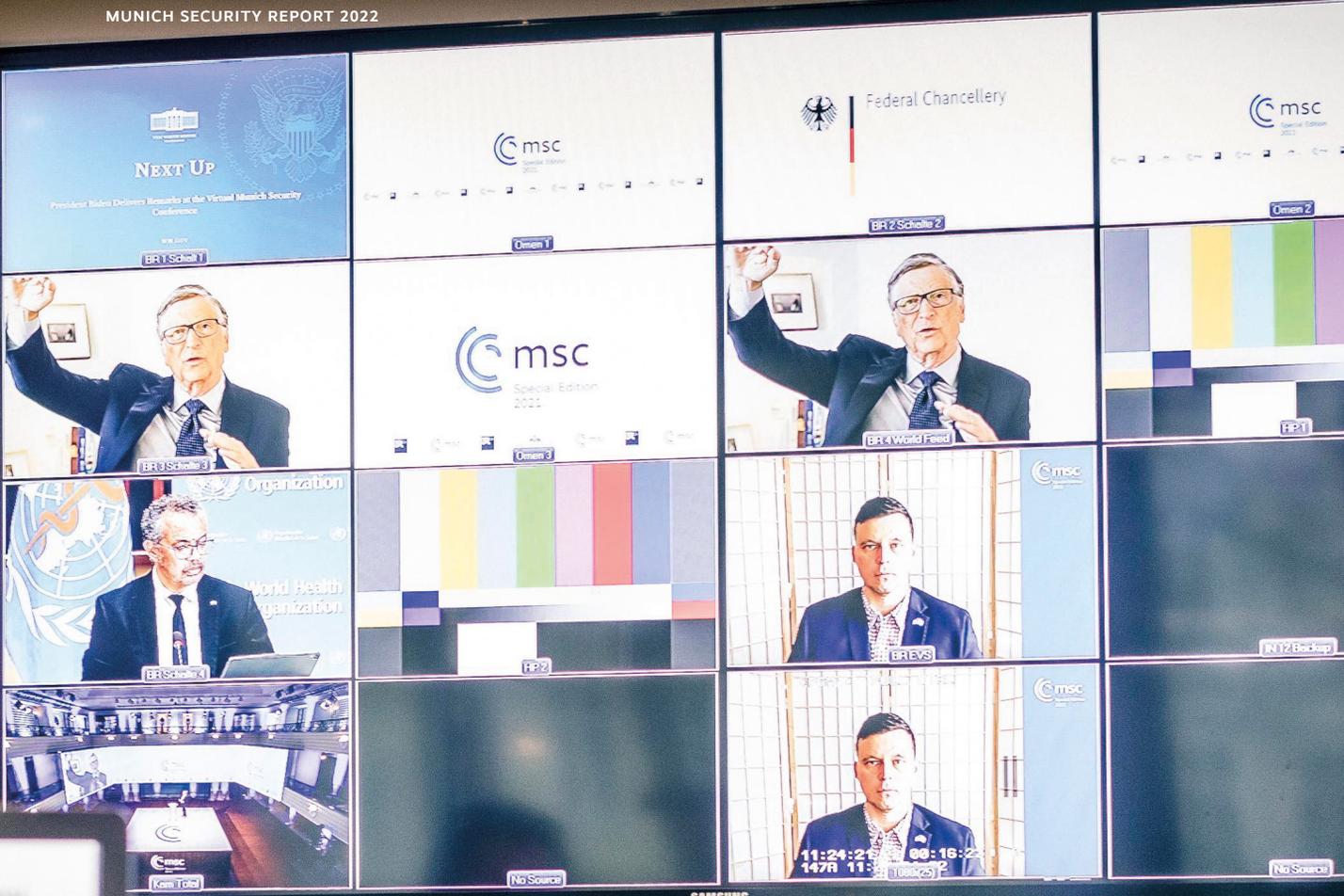
Munich Security Index 2022

Against a rising tide of mutually reinforcing crises – including the climate crisis, a global health crisis, and democratic backsliding – it is important to assess and compare risk perceptions in different parts of the world and track changes over time in the way people view risk. The overall picture painted by the second edition of the Munich Security Index, based on surveys conducted in November 2021, is one of growing concern about risk. Overall, the people polled are now even more risk-aware than they were in February and March of 2021, when the first wave of research was conducted. This increased awareness pertains, among other things, to the perceived risk posed by mass migration, food shortages, climate change, extreme weather events, rising inequality, and cyberattacks. But it is also evident in risk perceptions toward other countries – China and Russia chief among them. Only four of the 31 risks covered in the index have not seen an overall increase in threat perception: the Covid-19 pandemic (as Delta and Omicron were not yet a major worry for many countries when the polling took place), a potential future pandemic, a national economic or financial crisis, and international organized crime. While the risks posed by climate change and environmental threats continue to be top concerns for the people surveyed, the greatest overall increase in risk perception relates to food shortages and mass migration as a result of war or climate change. Yet risk perceptions and the extent to which these have increased since the last edition of the index still differ greatly by nation: while Germany has seen the greatest increase in worries about risks, overall concern about risks has decreased in China and Brazil.

> ### About the Munich Security Index
> The MSC and Kekst CNC have together built a new data set 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 – from climate change and pandemics to the risks posed by countries like China and Russia? And how prepared do societies feel to tackle these various threats? By combining five metrics – overall risk, potential damage, expected trajectory, perceived imminence, and feelings of preparedness – the index, underpinned by a survey of 12,000 people globally, provides an in-depth view of how G7 and BRICS nations view 31 major global and domestic risks. The index also enables an evaluation of how risk perceptions change over time.

The Munich Security Index is also available on our website:

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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.

Overall

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]

Trajectory

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]

Severity

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]

Imminence

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[1]

Preparedness

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[2]

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 score) that can be compared between demographics, countries, and over time.

Question 1
Overall

Question 2
Trajectory

Question 3
Severity

Question 4
Imminence

rescaled
+
reversed

Question 5
Preparedness

reversed

Mean
scores   0 – 10   +   0 – 10   +   0 – 10   +   0 – 10   +   0 – 10

added

0 – 50

rescaled

0 – 100

| 0 – 10 | 11 – 20 | 21 – 30 | 31 – 40 | 41 – 50 | 51 – 60 | 61 – 70 | 71 – 80 | 81 – 90 | 91 – 100 |
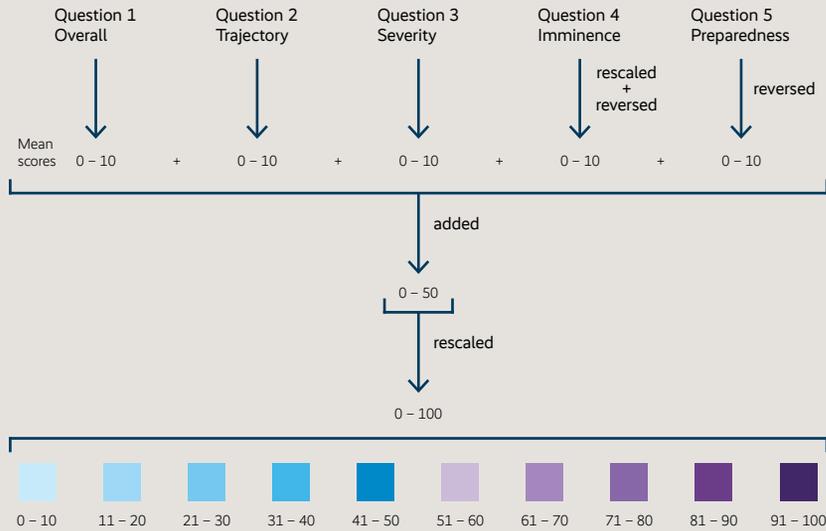
Besides a risk heatmap (see page 36) that features all twelve countries surveyed and how they score on each of the 31 risks covered, the Munich Security Index 2022 also includes an overview of how risk perceptions have changed since the last Munich Security Index was published (see pages 37–38).

The index also provides more detailed insights into the individual risk profiles of the twelve countries surveyed (pages 40–51).

Country profiles

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

Change in index score
Change in the risk index score since the last Munich Security Index was published. The 2021 version of the index was based on surveys conducted in February and March 2021.

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

Share feeling unprepared
Percentage of respondents who rated their country's preparedness as less than 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 1.6
The risk heatmap, November 2021, score

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."

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

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Figure 1.7
The change heatmap, November 2021, change in index score since February/March 2021

Country	Mass migration as a result of war or climate change	Food shortages	Climate change generally	Extreme weather and forest fires	Divisions amongst Western powers and institutions	Russia	Destruction of natural habitats	Political polarization	Rising inequality	Racism and other discrimination	Rapid change to my country's culture	Trade wars	Use of nuclear weapons by an aggressor	Cyberattacks on your country	Disinformation campaigns from enemies	North Korea	Autonomous robots-artificial intelligence	Right-wing terrorism	Breakdown of democracy in my country	European Union	Civil war or political violence in my country	Use of political violence	Radical Islamic terrorism	United States	Use of biological weapons by an aggressor	Use of chemical weapons and poisons by an aggressor	Iran	China	The coronavirus pandemic	A future pandemic
Germany	+13	+13	+6	+13	+10	+7	+9	+6	+9	+4	+6	+9	+6	+7	+6	+7	+6	+6	+8	+3	+5	+4	+4	+3	+4	+4	+5	+10	+3	+7
India	+7	+4	+5	+9	+11	+5	+5	+4	+5	+7	+5	+6	+5	+7	+5	+4	+9	+7	+3	+5	+10	+6	+7	+6	+9	+8	+8	+2	+4	+1
United States	+6	+17	+6	+5	+6	+3	+3	+6	+6	+5	+5	+6	+6	+5	+5	+5	+3	+3	+7	+0	+3	+5	+5	+6		+5	+1	+2	+3	+2
Russia	+13	+7	+4	+6	+6		+5		+10	+8	+10	+3	+3	+3	+1	+1	-2	+1		-2			+7	-2	+1	+4	-1	+0	+9	+21
United Kingdom	+10	+15	+1	+4	+6	+0	+0	+5	+4	+3	+5	+4	+6	+6	-2	-2	+4	+1	+4	+5	+1	+3	+2	+5	+3	+3	+4	+1	-1	-3
Italy	+7	+1	+6	+5	+5	+6	+6	+7	+2	+4	+3	+4	+1	+1	+7	+7	+5	+4	+3	+8	+0	+4	-2	-1	+5	-1	+3	+2	-9	-16
South Africa	+3	-3	+3	+1	+3	+1	+1	+3	+4	-2	-1	+0	-2	-2	+11	+4	-3	+6	+1	+0	-1	+4	-3	-1	-6	-5	-2	-10	+0	-1
China	+1	-6	+2	-1	+0	+0	+0	+0	-8	-2	-2	-4	-4	-4	-2	-1	+0	-4	+0	-2	-3	+0	-4	-3	-5	-3	-2		+4	+3
Canada	+6	+14	+6	+5	+6	+7	+7	+3	+6	+6	+1	+3	+1	+1	+2	+2	-2	+0	+2	+3	+4	+2	+0	+0	+1	+1	-4	-3	-3	-4
Japan	+1	+3	+3	-1	+4	+4	+4	+0	+4	-1	-1	+3	+2	+2	+4	+0	+0	+1	+0	+1	-2	-2	+2	+2	-1	+2	-2	+1	-3	-4
France	+3	+3	+2	+2	+6	+2	+2	+1	+1	+1	+0	-1	+3	+3	-9	+2	+5	+0	-1	+4	+2	-3	+1	-1	+6	-1	+1	+3	-4	-8
Brazil	+2	-2	-1	+1	+1	-2	-2	+1	-2	+1	+2	-1	+2	+2	+0	-1	+3	+1	-4	-1	+2	-4	-1	+3	-2	-2	+2	-2	-16	-31

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."

Legend (change in index score):
-35 – -31 | -30 – -26 | -25 – -21 | -20 – -16 | -15 – -11 | -10 – -6 | -5 – -1 | +0 – +5 | +6 – +10 | +11 – +15 | +16 – +20 | +21 – +25

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

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Figure 1.8 **The risk bump chart, ranking of risks by all countries surveyed, November and February/March 2021**

February/March 2021		November 2021
1	The coronavirus pandemic	1 Climate change generally (+3)
2	Extreme weather and forest fires	2 Destruction of natural habitats (+1)
3	Destruction of natural habitats	3 Extreme weather and forest fires (-1)
4	Climate change generally	4 The coronavirus pandemic (-3)
5	A future pandemic	5 Cyberattacks on your country (+2)
6	Economic or financial crisis in your country	6 Economic or financial crisis in your country (+0)
7	Cyberattacks on your country	7 A future pandemic (-2)
8	Rising inequality	8 Rising inequality (+0)
9	Disinformation campaigns from enemies	9 Disinformation campaigns from enemies (+0)
10	China	10 China (+0)
11	International organized crime	11 Racism and other discrimination (+1)
12	Racism and other discrimination	12 Mass migration as a result of war or climate change (+3)
13	Political polarization	13 Political polarization (+0)
14	Radical Islamic terrorism	14 International organized crime (-3)
15	Mass migration as a result of war or climate change	15 Food shortages (+5)
16	Use of biological weapons by an aggressor	16 Radical Islamic terrorism (-2)
17	Trade wars	17 Trade wars (+0)
18	Use of chemical weapons and poisons by an aggressor	18 Use of biological weapons by an aggressor (-2)
19	Civil war or political violence	19 Divisions amongst Western powers and institutions (+2)
20	Food shortages	20 Civil war or political violence (-1)
21	Divisions amongst Western powers and institutions	21 Use of chemical weapons and poisons by an aggressor (-3)
22	Use of nuclear weapons by an aggressor	22 Use of nuclear weapons by an aggressor (+0)
23	Breakdown of democracy in my country	23 Russia (+1)
24	Russia	24 Breakdown of democracy in my country (-1)
25	Rapid change to my country's culture	25 Rapid change to my country's culture (+0)
26	Right-wing terrorism	26 Right-wing terrorism (+0)
27	Autonomous robots-artificial intelligence	27 Autonomous robots-artificial intelligence (+0)
28	Iran	28 Iran (+0)
29	North Korea	29 North Korea (+0)
30	United States	30 United States (+0)
31	European Union	31 European Union (+0)

-3   -2   -1   +0   +1   +2   +3   +4   +5

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

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Canada: Risk perception in line with Western counterparts

	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
Cyberattacks on your country	62	+2	57	26
The coronavirus pandemic	58	-4	66	16
A future pandemic	58	-3	44	22
China	57	-3	43	33
Disinformation campaigns from enemies	55	+2	58	24
Economic or financial crisis in your country	55	+0	49	26
Rising inequality	52	+6	54	26
Food shortages	51	+14	45	27
Racism and other discrimination	50	+6	57	19
International organized crime	49	+0	46	23
Political polarization	48	+3	50	22
Mass migration as a result of war or climate change	48	+6	42	29
Use of biological weapons by an aggressor	47	+0	28	39
Russia	47	+0	40	32
Use of chemical weapons and poisons by an aggressor	46	+1	27	39
Radical Islamic terrorism	46	+0	45	26
Divisions amongst Western powers and institutions	46	+5	41	24
Trade wars	45	+3	47	22
Right-wing terrorism	44	+3	44	24
Use of nuclear weapons by an aggressor	43	+1	24	38
Iran	41	-4	34	29
Civil war or political violence	40	+2	36	25
Autonomous robots-artificial intelligence	39	+0	34	28
North Korea	39	-2	31	30
Rapid change to my country's culture	38	+1	32	24
Breakdown of democracy in my country	35	+2	27	29
United States	28	+1	27	24
European Union	17	+4	21	20

1 Canadian respondents perceive extreme weather and forest fires, climate change in general, the destruction of natural habitats, cyberattacks, and the coronavirus pandemic as the top risks. Alongside respondents from European nations, risks associated with climate change rank highly.

2 Though it has dropped from being the highest-rated risk in early 2021 to number five in late 2021, two-thirds of Canadian respondents still think the threat of the coronavirus pandemic is imminent. Meanwhile, the risk of a future pandemic is also considered high, a feeling echoed by respondents from Russia, the United Kingdom, and France.

3 Canadians are in line with US respondents' worries about China (with index scores of 57 and 60, respectively). In this regard, respondents in Canada view the Chinese threat slightly more seriously than European counterparts like France (52), Italy (51), and the United Kingdom (53).

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

63% of Canadians think extreme weather and forest fires are an imminent threat.

France: Eye-to-eye with Germany

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Radical Islamic terrorism	75	-1	70	20
Climate change generally	71	+1	60	23
Extreme weather and forest fires	70	+2	61	23
Destruction of natural habitats	68	+2	61	23
Mass migration as a result of war or climate change	68	+3	58	32
The coronavirus pandemic	65	-8	71	14
A future pandemic	65	-4	58	23
Rising inequality	64	+1	59	22
Racism and other discrimination	63	+1	65	17
Cyberattacks on your country	60	-9	58	18
Economic or financial crisis in your country	59	+0	54	20
Civil war or political violence	55	-3	47	23
Disinformation campaigns from enemies	54	+2	58	15
Divisions amongst Western powers and institutions	53	+2	48	18
Iran	53	+1	43	21
China	52	+3	38	21
Trade wars	51	-1	51	17
International organized crime	51	+0	49	18
Use of biological weapons by an aggressor	50	+1	29	23
Use of chemical weapons and poisons by an aggressor	50	-1	31	22
Rapid change to my country's culture	49	+0	37	29
Right-wing terrorism	48	+4	50	17
Russia	48	+6	40	21
Breakdown of democracy in my country	47	-1	35	28
Food shortages	46	+3	39	23
Political polarization	45	+1	50	12
Use of nuclear weapons by an aggressor	44	+3	28	19
North Korea	43	+5	31	21
Autonomous robots- artificial intelligence	40	+0	41	20
United States	29	+6	29	21
European Union	22	+2	27	20

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

1 The top risks in the eyes of French respondents are radical Islamic terrorism, climate change in general, extreme weather and forest fires, the destruction of natural habitats, and mass migration as a result of war or climate change.

2 Four out of five of the risks rated highest by French respondents are related to the climate – more than in any other nation surveyed, along with Germany. 32 percent of French respondents said they feel unprepared for mass migration due to war or climate change, the highest figure for any threat covered.

3 French respondents are, by some distance, the most worried about radical Islamic terrorism, with an index score of 75. European peers, Italy (54) and the United Kingdom (58), are less concerned about the terrorism risk. Germany is more closely aligned (67). A high percentage of respondents in both Germany and France feel the risk of radical Islamic terrorism is imminent (70 and 67 percent, respectively).

32% of the French public feel unprepared for mass migration due to war or climate change.

Germany: More risk-aware now than in early 2021

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Extreme weather and forest fires	75	+9	68	37
Destruction of natural habitats	75	+9	66	36
Climate change generally	74	+8	63	34
The coronavirus pandemic	71	+7	75	29
Mass migration as a result of war or climate change	71	+13	65	38
Cyberattacks on your country	68	+6	69	34
Rising inequality	68	+9	65	34
Radical Islamic terrorism	67	+3	68	29
International organized crime	67	+0	68	29
A future pandemic	65	+3	57	34
Right-wing terrorism	57	+3	63	24
Racism and other discrimination	57	+4	65	24
Economic or financial crisis in your country	57	+0	51	28
Political polarization	55	+6	60	23
China	55	+10	43	34
Divisions amongst Western powers and institutions	54	+11	50	30
Disinformation campaigns from enemies	53	+7	59	28
Russia	53	+12	42	32
Trade wars	46	+9	42	29
Iran	45	+5	38	30
Autonomous robots- artificial intelligence	44	+6	45	31
Rapid change to my country's culture	43	+6	41	30
Use of biological weapons by an aggressor	42	+4	20	47
Use of chemical weapons and poisons by an aggressor	42	+4	21	46
Civil war or political violence	42	+4	38	34
Use of nuclear weapons by an aggressor	40	+7	20	43
Food shortages	38	+13	35	31
North Korea	38	+6	30	32
Breakdown of democracy in my country	36	+8	28	35
United States	29	+4	27	27
European Union	23	+5	27	24

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

1. The top risks perceived by German respondents are extreme weather and forest fires, the destruction of natural habitats, climate change in general, the coronavirus pandemic, and mass migration resulting from war or climate change.

2. Germany is the only European country to rate the coronavirus pandemic as more of a risk at the end of 2021 than in early 2021. 75 percent of respondents feel the risk of the pandemic is imminent – the highest percentage of any country bar Russia (82 percent) and South Africa (77 percent).

3. Across the board, German respondents are more risk-aware in 2022 than they were in 2021. Since the last index, mass migration due to war or climate change, divisions among Western powers and institutions, Russia, and food shortages have all experienced a sharp increase in index scores. Over a third of Germans (38 percent) feel unprepared for the impact of mass migration due to war or climate change, higher than any other Western country.

75% of German respondents feel the risk of the coronavirus pandemic is still imminent.

Italy: More relaxed about the pandemic, worried about the environment

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Extreme weather and forest fires	81	+6	69	34
Destruction of natural habitats	79	+6	63	32
Climate change generally	78	+2	61	32
Cyberattacks on your country	65	+7	63	25
Rising inequality	65	+2	60	29
Economic or financial crisis in your country	64	+0	53	30
Mass migration as a result of war or climate change	62	+7	53	32
The coronavirus pandemic	60	-16	72	13
Disinformation campaigns from enemies	60	+7	59	24
Racism and other discrimination	60	+4	63	23
International organized crime	60	+0	57	24
A future pandemic	59	-9	48	18
Trade wars	55	+4	49	25
Radical Islamic terrorism	54	-1	52	26
Divisions amongst Western powers and institutions	52	+5	49	24
China	51	+2	36	33
Political polarization	49	+7	51	22
Use of biological weapons by an aggressor	48	-2	29	46
Use of chemical weapons and poisons by an aggressor	48	-1	28	45
Russia	45	+10	34	32
Iran	45	+3	36	33
Civil war or political violence	44	+4	37	27
Use of nuclear weapons by an aggressor	43	+1	27	46
Breakdown of democracy in my country	42	+3	30	31
Food shortages	41	+1	31	33
Autonomous robots-artificial intelligence	39	+4	39	27
Right-wing terrorism	37	+8	38	20
Rapid change to my country's culture	36	+3	27	29
North Korea	36	+5	28	32
United States	27	+5	27	28
European Union	23	+0	26	24

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

1. The top risks of concern in Italy are extreme weather and forest fires, the destruction of natural habitats, climate change in general, cyber-attacks, and increasing inequality.

2. Compared with early 2021, the coronavirus pandemic is the risk to have decreased the most in the eyes of Italian respondents. Only 13 percent feel unprepared for this threat, significantly less than German respondents (29 percent). Similarly, a future pandemic is viewed by Italians as only a medium-tier risk; in contrast, respondents in other countries view it as a major threat.

3. Italians seem relatively calm about risks that preoccupy other European nations. The risk of rapid change to a country's culture and right-wing terrorism are more prominent in Germany, the United Kingdom, and France. Italians are also more relaxed about the threat posed by Iran, Russia, and China when compared with their European counterparts.

13% of Italian respondents feel unprepared for the coronavirus pandemic – a substantial decrease.

Japan: Threats from China, Russia, and North Korea

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
China	71	+1	44	28
Climate change generally	70	+6	51	25
Destruction of natural habitats	69	+4	48	25
Cyberattacks on your country	68	+4	56	27
Extreme weather and forest fires	68	+3	51	25
Rising inequality	64	+4	49	31
North Korea	64	+0	43	30
The coronavirus pandemic	63	-4	70	14
A future pandemic	60	-3	45	22
Russia	58	+2	35	29
Economic or financial crisis in your country	56	+0	32	25
Use of nuclear weapons by an aggressor	54	+2	17	39
Use of biological weapons by an aggressor	54	+2	18	41
Use of chemical weapons and poisons by an aggressor	54	+2	16	40
Disinformation campaigns from enemies	54	+0	46	29
International organized crime	53	+0	39	28
Food shortages	51	+3	24	30
Trade wars	49	+3	37	21
Autonomous robots- artificial intelligence	48	+1	42	24
Mass migration as a result of war or climate change	45	+1	26	30
Racism and other discrimination	44	-1	42	25
Radical Islamic terrorism	43	+2	29	32
Iran	41	-2	28	27
Political polarization	38	+0	32	26
Civil war or political violence	38	-2	25	27
Breakdown of democracy in my country	37	+0	17	29
Rapid change to my country's culture	37	-1	23	26
United States	36	-1	20	25
Right-wing terrorism	35	+1	20	28
Divisions amongst Western powers and institutions	35	-1	22	27
European Union	28	-2	17	25

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

1 The top risks that concern respondents from Japan are China, climate change in general, the destruction of natural habitats, cyberattacks, and extreme weather and forest fires.

2 Japan is the only country surveyed to rank three other countries (China, Russia, and North Korea) within its top ten perceived risks. Furthermore, Japanese respondents are more concerned about each of these countries individually than any other country surveyed. As in early 2021, China is considered the biggest single threat to Japan.

3 Echoing their concern about the threat posed by foreign nations, Japanese respondents are the most worried about the threat of weapons of mass destruction (nuclear, biological, and chemical weapons). Aside from Japan, these are considered medium-tier risks in only one other country: China.

↑
+6
The number of places up the risk index ranking that climate change has moved in Japan.

United Kingdom: Climate change has become top risk

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Climate change generally	62	+0	54	19
Destruction of natural habitats	60	+0	55	21
The coronavirus pandemic	59	-3	66	16
A future pandemic	58	-1	52	17
Radical Islamic terrorism	58	+5	60	15
Cyberattacks on your country	57	-2	59	14
Extreme weather and forest fires	57	+1	54	20
Russia	55	+6	46	25
Mass migration as a result of war or climate change	54	+10	50	27
China	53	+1	44	24
International organized crime	53	+0	57	14
Economic or financial crisis in your country	52	+0	51	18
Racism and other discrimination	51	+3	58	17
Rising inequality	49	+4	54	20
Food shortages	49	+15	53	21
Disinformation campaigns from enemies	48	-2	55	16
Right-wing terrorism	47	+5	50	14
Divisions amongst Western powers and institutions	47	+4	47	18
Trade wars	47	+4	54	17
Use of chemical weapons and poisons by an aggressor	46	+3	32	22
Iran	46	+4	43	20
Political polarization	45	+5	46	15
Use of biological weapons by an aggressor	44	+2	30	22
Use of nuclear weapons by an aggressor	41	+6	26	19
Rapid change to my country's culture	41	+5	39	22
North Korea	40	+4	35	20
Civil war or political violence	39	+3	40	18
Breakdown of democracy in my country	36	+4	32	21
Autonomous robots-artificial intelligence	35	+1	38	17
European Union	23	+1	30	17
United States	22	+3	27	20

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

1 Since the last wave of research, climate change has taken over as the top risk in the United Kingdom. The destruction of natural habitats is second – with an unchanged index score of 60, despite all the attention on COP in Glasgow during the polling. Three of the top seven risks perceived in the United Kingdom are climate-related risks, but none of them have increased meaningfully since the start of 2021.

2 For the United Kingdom, the big increases in index scores concern mass migration, Russia, and food shortages. The risk of food shortages has increased by 15 points and 14 places.

3 Respondents in the United Kingdom are less concerned about the breakdown of democracy, civil war and political violence, and rapid change to their culture. Here, the UK's risk profile is most aligned with Germany, Italy, and Japan, while in France, these topics are viewed as greater threats.

54% of the British public think that the risk from climate change is imminent.

United States: Split on the risk of climate change

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Cyberattacks on your country	66	+5	60	19
Political polarization	63	+6	56	22
Economic or financial crisis in your country	62	+0	56	23
Disinformation campaigns from enemies	60	+5	59	21
China	60	+2	50	21
Breakdown of democracy in my country	59	+7	47	27
Extreme weather and forest fires	58	+4	54	20
The coronavirus pandemic	57	+2	60	15
A future pandemic	57	+3	47	19
Destruction of natural habitats	57	+3	52	19
Food shortages	57	+17	52	23
Civil war or political violence	56	+5	47	24
Rapid change to my country's culture	55	+5	50	24
Russia	54	+2	46	19
Climate change generally	53	+5	48	21
Iran	53	+1	48	17
Use of biological weapons by an aggressor	52	+5	34	20
Radical Islamic terrorism	52	+6	48	16
Mass migration as a result of war or climate change	52	+6	46	27
Racism and other discrimination	52	+5	54	19
North Korea	51	+3	45	18
Use of chemical weapons and poisons by an aggressor	50	+5	33	18
Divisions amongst Western powers and institutions	49	+6	44	19
Use of nuclear weapons by an aggressor	48	+5	32	15
Trade wars	48	+6	49	16
Rising inequality	48	+6	50	21
International organized crime	46	+0	47	15
Autonomous robots-artificial intelligence	41	+3	39	18
Right-wing terrorism	40	+0	42	18
European Union	22	+3	26	14

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

1 The US continues to be an outlier on climate change in the risk index. American respondents rank climate change in general as a medium-tier risk. In this wave of research, it is up five points but only ranks 15th among all other risks. There also continues to be a strong partisan divide on this issue.

2 The second-largest risk perceived by Americans is political polarization. The risk of a breakdown of democracy has risen six places to sixth in the US risk ranking.

3 The risk that the US faces from China is up two points in this wave of research but is supplanted from being the second-highest risk, down to fifth place. The share of respondents who feel China presents an imminent risk is down two points.

4 As supply chain issues continue to bite, the risk of food shortages has leaped up a massive 17 places in the US risk ranking and increased by 17 points since the last wave of research. This move matches the global trend but is the largest for any country surveyed.

↑

+17

The number of places up the risk index ranking that food shortages jumped in 2021 in the US.

Brazil: A rare case of decreasing risk perception since the start of 2021

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Rising inequality	85	-2	72	42
Economic or financial crisis in your country	85	+0	69	43
Destruction of natural habitats	84	-2	67	41
Extreme weather and forest fires	83	-3	69	40
Climate change generally	82	-1	65	39
Racism and other discrimination	74	+1	70	33
A future pandemic	73	-16	64	32
Political polarization	73	+1	66	33
Food shortages	73	-2	59	41
The coronavirus pandemic	69	-31	72	26
Disinformation campaigns from enemies	68	-1	61	38
Cyberattacks on your country	65	+0	55	41
Civil war or political violence	65	-4	56	39
Breakdown of democracy in my country	63	-4	50	38
Divisions amongst Western powers and institutions	61	+2	55	36
Trade wars	60	-1	55	34
International organized crime	59	+0	49	42
Mass migration as a result of war or climate change	57	+2	53	37
Use of biological weapons by an aggressor	54	-1	33	56
China	54	-2	42	45
Use of chemical weapons and poisons by an aggressor	52	-2	33	54
Rapid change to my country's culture	51	+2	46	36
Use of nuclear weapons by an aggressor	49	+2	29	56
Autonomous robots-artificial intelligence	49	+1	45	43
Right-wing terrorism	44	-1	41	41
Radical Islamic terrorism	40	+3	36	49
United States	40	-2	37	41
Russia	39	+1	35	42
North Korea	37	+3	31	44
Iran	35	+2	31	41
European Union	33	+2	33	39

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

1 The very high level of concern about the coronavirus pandemic we saw in Brazil in early 2021 has eased by the end of the year. The risk index score is down 31 points, and the pandemic is now a medium-tier risk for Brazilians. Concerns about a future pandemic are now higher than concerns about the current pandemic.

2 According to Brazilian respondents, rising inequality is currently the biggest threat – tied with the risk of an economic or financial crisis. The index scores for both risks are largely unchanged but assume top spots in Brazil by virtue of declines in other risks.

3 The destruction of natural habitats has marginally decreased as a risk, even if at high levels in a global comparison. Along with climate change, severe weather and forest fires, a considerable proportion of respondents in Brazil (40 percent) feel very unprepared for this risk.

40% of respondents in Brazil feel very unprepared for the risk posed by the destruction of natural habitats.

China: Risk from the US has decreased and a future pandemic is on the radar

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
United States	39	-5	36	4
The coronavirus pandemic	38	+3	55	4
Climate change generally	37	+0	40	4
Extreme weather and forest fires	36	+2	37	4
Cyberattacks on your country	34	-2	42	4
Destruction of natural habitats	34	+0	35	4
A future pandemic	33	+4	50	5
Disinformation campaigns from enemies	33	-1	44	5
Use of biological weapons by an aggressor	32	-4	27	6
Use of nuclear weapons by an aggressor	31	-4	25	5
Use of chemical weapons and poisons by an aggressor	30	-3	23	6
Trade wars	30	-4	57	5
Autonomous robots-artificial intelligence	27	-4	35	5
European Union	25	-3	28	3
Divisions amongst Western powers and institutions	24	-1	29	6
International organized crime	24	+0	32	5
Right-wing terrorism	22	-2	29	6
Mass migration as a result of war or climate change	22	+1	24	6
Rising inequality	22	-8	27	6
Economic or financial crisis in your country	22	+0	25	5
Radical Islamic terrorism	21	-3	30	7
Political polarization	21	+0	26	6
Racism and other discrimination	20	-2	28	7
Rapid change to my country's culture	20	-2	24	6
Civil war or political violence	18	+0	20	7
Food shortages	14	-6	19	5
Breakdown of democracy in my country	12	+0	16	7
Russia	11	-4	18	8
Iran	10	-2	20	10
North Korea	10	+0	17	11

1 The threat from the US is still the top risk felt in China, but perceptions of it have softened compared to the start of 2021 (down five points). US respondents also felt that the reciprocal threat from China has decreased. Only 36 percent of Chinese respondents think that the threat posed by the US to China is imminent.

2 Among Chinese respondents, the coronavirus pandemic and a future pandemic are perceived as higher risks than at the start of 2021 (index scores are up three and four points, respectively). 50 percent of respondents feel that a future pandemic is an imminent risk in the next five years, second only on that metric to the current coronavirus pandemic.

3 Climate change has dropped one place in the risk ranking of Chinese respondents but has an unchanged index score of 37. Extreme weather is up two points (to 36), and all three climate-related risks are among the top six risks in China.

50% of Chinese respondents feel that a future pandemic is an imminent risk in the next five years.

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

India: The only country with nuclear weapons at the top of its list

Risk	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Use of nuclear weapons by an aggressor	64	+7	62	8
Climate change generally	64	+6	59	9
China	62	+2	58	8
Cyberattacks on your country	61	+5	59	8
Extreme weather and forest fires	61	+5	58	9
Destruction of natural habitats	61	+5	55	9
The coronavirus pandemic	60	+1	61	6
Use of biological weapons by an aggressor	59	+7	50	9
Use of chemical weapons and poisons by an aggressor	58	+8	52	10
A future pandemic	58	+4	54	9
Political polarization	58	+4	58	9
Radical Islamic terrorism	57	+6	57	7
Right-wing terrorism	56	+5	54	8
Disinformation campaigns from enemies	56	+4	53	8
Economic or financial crisis in your country	56	+0	55	8
Autonomous robots-artificial intelligence	55	+7	54	9
Racism and other discrimination	55	+7	55	9
Mass migration as a result of war or climate change	54	+7	52	8
Civil war or political violence	54	+6	52	8
Rising inequality	54	+5	53	9
International organized crime	54	+0	51	8
Divisions amongst Western powers and institutions	52	+6	52	8
Trade wars	52	+6	50	9
Rapid change to my country's culture	51	+5	48	7
Food shortages	50	+4	48	7
Breakdown of democracy in my country	49	+3	46	9
North Korea	42	+9	39	9
Iran	40	+8	44	10
Russia	37	+8	42	9
United States	36	+9	39	11
European Union	35	+10	37	11

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

1 Climate change is tied with nuclear-armed conflict as the top risk in India. Both threats have increased substantially since the last wave of research (seven and six points, respectively). The risk of extreme weather events is also up five points, as is the destruction of natural habitats. All three climate-related risks are among the top six risks in India.

2 China is the third-ranked risk in India and up two points since the start of 2021. 58 percent of Indian respondents think it is a risk likely to come to fruition within the next five years.

3 Cyberattacks are the fourth-ranked risk in India, up two places.

58% of Indian respondents think China will become a relevant risk in the next five years.

Russia: A country seeing risks at every turn

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Rising inequality	70	+6	65	33
The coronavirus pandemic	69	+21	82	25
Economic or financial crisis in your country	68	+0	64	32
Extreme weather and forest fires	66	+4	62	29
A future pandemic	62	+9	65	29
Destruction of natural habitats	60	+5	43	28
Climate change generally	57	+4	42	24
Disinformation campaigns from enemies	53	+1	67	12
Trade wars	51	+3	59	21
Cyberattacks on your country	48	+1	64	13
United States	48	+1	46	15
Use of biological weapons by an aggressor	46	+7	34	19
Mass migration as a result of war or climate change	45	+13	41	24
Food shortages	39	+7	35	24
Radical Islamic terrorism	38	-2	46	13
Rapid change to my country's culture	38	+10	34	24
Use of chemical weapons and poisons by an aggressor	37	+4	26	19
International organized crime	37	+0	43	12
Racism and other discrimination	35	+8	47	17
European Union	34	+2	39	12
Autonomous robots-artificial intelligence	33	+1	41	17
Right-wing terrorism	32	-2	41	13
Divisions amongst Western powers and institutions	30	+2	37	13
Use of nuclear weapons by an aggressor	29	+3	20	10
China	21	+0	23	17
Iran	4	-1	18	11
North Korea	1	+0	17	11

1 According to Russian respondents, as in the last iteration of the index, rising inequality is the greatest risk. 65 percent of respondents in Russia say that inequality is imminent. With a risk index score of 70, it is up six points since early 2021. 33 percent of Russian respondents feel very unprepared for what rising inequality entails – the highest share for any risk Russia faces.

2 The coronavirus pandemic has jumped up the list of risks that Russian respondents perceive to themselves. It is up 21 points – more than any other risk in any other country.

3 The third-highest scoring risk in Russia is an economic or financial crisis. The index score for this risk has not changed since early 2021, and 64 percent of Russian respondents see it as an imminent risk.

64% of Russians see an economic or financial crisis as an imminent risk.

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

South Africa: The country with the highest individual risk

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Economic or financial crisis in your country	86	+0	69	42
Rising inequality	82	+4	71	40
Racism and other discrimination	80	-2	75	34
Climate change generally	79	+8	70	33
Food shortages	76	-3	63	40
Extreme weather and forest fires	75	+3	70	32
Destruction of natural habitats	75	+1	65	32
Political polarization	75	+3	67	33
The coronavirus pandemic	74	-1	77	21
Civil war or political violence	73	+4	61	38
Cyberattacks on your country	71	+11	61	35
A future pandemic	70	+0	61	31
Breakdown of democracy in my country	70	+1	56	37
International organized crime	66	+0	58	35
Disinformation campaigns from enemies	65	+4	62	32
Mass migration as a result of war or climate change	63	+3	53	40
Rapid change to my country's culture	60	-1	57	32
Divisions amongst Western powers and institutions	59	+1	52	35
China	58	-10	45	41
Trade wars	54	+0	49	35
Use of chemical weapons and poisons by an aggressor	53	-5	33	48
Use of biological weapons by an aggressor	52	-3	31	49
Autonomous robots-artificial intelligence	49	+6	45	39
Use of nuclear weapons by an aggressor	48	-2	28	49
Right-wing terrorism	43	+0	36	36
Russia	42	-6	33	43
United States	42	-6	35	40
Radical Islamic terrorism	41	-1	37	39
European Union	38	-1	33	38
Iran	35	-2	29	41
North Korea	34	-3	26	43

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

1 An economic or financial crisis in the country is the top risk perceived by South African respondents. With an index score of 86, it is the highest risk perception in any country surveyed, just ahead of rising inequality in Brazil. The risk of food shortages, on the other hand, has decreased by two points since the last polling, defying the global trend. Yet, with an index score of 76, the risk remains real for South Africans.

2 The risk from rising inequality ranks second for South African respondents and is up four points since the start of 2021. 71 percent of respondents perceive inequality as an imminent threat.

3 For the risk of racism and discrimination, the threat of civil war and political violence, and the risk of a breakdown of democracy, South Africa has the highest index scores of any country surveyed.

71% of South African respondents perceive rising inequality as an imminent threat.

Selected Highlights from the Munich Security Index 2022

Since the last wave of research on risk perceptions in February and March 2021, concern about risk has grown among G7 and BRICS countries. Against that backdrop, which patterns of change and consistencies stand out regarding respondents' views about who or what poses a risk?

As at the beginning of 2021, we asked people to evaluate other countries as allies or threats (Figure 1.9). The pattern of diverse risk perceptions in non-Western countries that were evident in the last wave of research is still apparent; however, it appears that fragmentation in the West – another finding from early 2021 – has somewhat decreased. While Italy still has more favorable views of China and Russia than the United States, Canada, and its European peers, the differences in risk perception have decreased. Italian respondents now seem more risk-aware of Russia and China than they were about nine months ago. When looking at changes in threat perception among all 12 countries surveyed and among countries who are members of NATO (Figure 1.10), several points stand out. The brutal crackdown on protests by the Belarusian regime has provoked the largest deterioration in risk perception across all countries. Interestingly, among NATO countries, views of Hungary and Poland have also worsened significantly. This deterioration is likely linked to growing assaults on the rule of law in both countries. Globally, there has been a substantial decrease in the extent to which countries view the United States as a risk – likely the lagged effect of the new US administration, which came into office in early 2021.

Figure 1.9

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

Respondent \ Country	North Korea	China	Iran	Russia	Pakistan	Saudi Arabia	Turkey	Belarus	Ukraine	Venezuela	South Korea	Estonia	Israel	Hungary	India	Poland	Taiwan	Argentina	Japan	Mexico	Brazil	South Africa	US	UK	France	Germany	Greece	Australia	Norway	Finland	Canada	Netherlands	Italy
Japan	-62	-44	-9	37	4	18	31	3	14	13	-25	17	4	26	35	29	57	26		23	31	21	49	44	40	42	30	46	37	37	46	39	39
Germany	-38	-28	-33	-22	-17	-17	-22	-26	8	-5	11	28	15	8	5	17	5	15	22	7	4	15	34	27	40		34	32	42	40	38	40	42
France	-36	-20	-33	-13	-26	-17	-26	-18	10	7	14	26	18	26	11	27	12	22	26	18	11	20	42	33		51	44	32	46	45	50	51	50
United Kingdom	-34	-29	-33	-31	-1	2	12	-3	13	10	21	26	16	29	24	37	20	8	31	21	18	30	44		32	38	40	50	48	44	49	47	43
Canada	-30	-30	-25	-21	-7	-8	8	-3	17	8	27	13	18	21	20	28	23	18	29	32	19	22	42	45	40	37	29	42	40	39		40	38
United States	-28	-24	-26	-20	-10	2	11	8	17	3	31	19	28	24	25	33	31	19	33	27	24	28		43	41	31	33	40	36	36	43	36	36
Italy	-23	-9	-22	2	-15	-7	-13	-4	11	13	10	17	18	10	6	18	9	28	31	21	18	20	39	38	39	40	40	34	36	36	36	36	
Brazil	-25	-2	-20	-7	-15	-6	-1	-11	-3	-8	3	-3	10	1	5	5	-4	17	18	17		15	31	23	14	14	11	16	10	7	20	15	21
South Africa	-7	10	-9	10	8	6	13	6	9	11	15	9	7	13	30	14	14	18	22	11	27		29	34	23	28	21	28	20	18	27	26	20
Russia	6	20	-1		-11	-9	-17	51	-56	27	-1	-32	7	1	34	-33	9	23	-19	17	23	10	-50	-34	-8	-14	16	-6	-9	10	-20	-8	8
China	31		30	44	44	28	21	30	20	28	16	17	20	23	3	19		26	-4	24	23	28	-4	12	22	25	27	9	23	21	14	23	21
India	15	-3	27	39	6	33	28	33	31	30	34	32	33	36		33	37	32	43	36	40	37	41	39	40	39	38	40	37	35	38	40	42

Legend (color scale):
+51 – +60 · +41 – +50 · +31 – +40 · +21 – +30 · +11 – +20 · +0 – +10 · -10 – -1 · -20 – -11 · -30 – -21 · -40 – -31 · -50 – -41 · -60 – -51 · -70 – -61

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

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Figure 1.10

Perceptions of other countries as threats or allies, change between February/March and November 2021

Perceptions among G7 and BRICS countries

Country	Value
Belarus	-81
China	-14
Russia	-13
Ukraine	-2
Japan	-2
Italy	-1

Perceived as a greater threat than in early 2021

Country	Value
Hungary	+1
North Korea	+3
Poland	+4
Pakistan	+6
South Korea	+10
Finland	+10
South Africa	+12
Brazil	+12
Germany	+13
Argentina	+13
Israel	+14
Estonia	+14
Mexico	+17
Turkey	+20
Taiwan	+20
India	+20
Venezuela	+22
Iran	+23
Greece	+24
Saudi Arabia	+26
Canada	+26
Norway	+31
UK	+37
US	+38

Perceived as a greater ally than in early 2021

Perceptions among NATO* countries

Country	Value
Belarus	-73
Hungary	-22
Poland	-19
Pakistan	-17
Japan	-16
South Korea	-15
Ukraine	-14
Russia	-13
Italy	-10
Greece	-9
Estonia	-9
India	-7
Brazil	-7
Finland	-7
Germany	-6
Canada	-6
China	-6
Taiwan	-4
Norway	-2
Argentina	-1

Perceived as a greater threat than in early 2021

Country	Value
South Africa	+0
Israel	+1
Mexico	+1
UK	+1
Turkey	+6
US	+8
Venezuela	+13
Iran	+14
Saudi Arabia	+18
North Korea	+20

Perceived as a greater ally than in early 2021

Legend:
-90 – -61 | -60 – -51 | -50 – -41 | -40 – -31 | -30 – -21 | -20 – -11 | -10 – -1
+0 – +10 | +11 – +20 | +21 – +30 | +31 – +40 | +41 – +50 | +51 – +60

*Canada, France, Germany, Italy, UK, US
Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

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Figure 1.11

Citizens' preferences for their country's response to the rise of China, share saying that their country should oppose China minus share saying that their country should cooperate with China, November 2021, percent

● Size of circles = size of population

What do you think your country should do in response to the rise of China as a military and economic power?

Figure 1.12

Citizens' views on China invading Taiwan, share saying risk is high, February/March and November 2021, percent

● February/March 2021   ● November 2021

	Change
Japan	+8
India	+3
US	+9
Canada	+9
Italy	+12
UK	+10
Germany	+9
South Africa	-3
Brazil	+5
France	+3
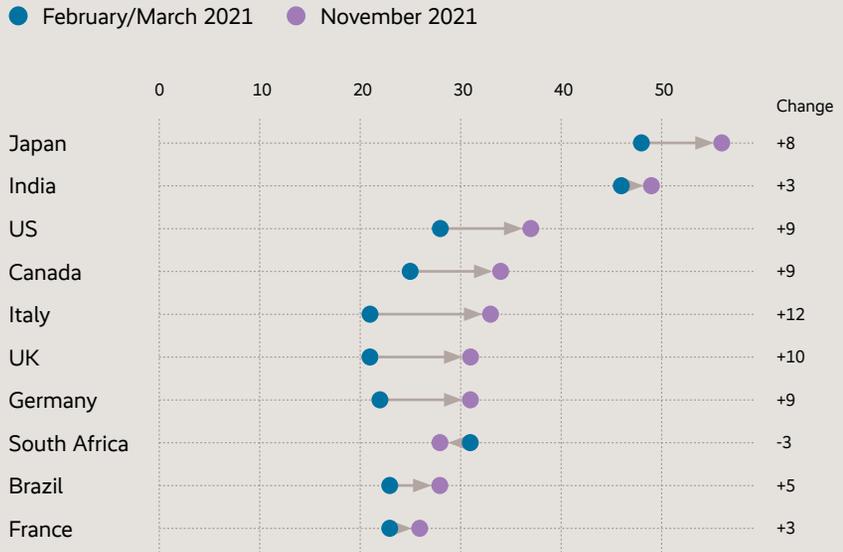
Data: Kekst CNC, commissioned by the
Munich Security Conference.
Illustration: Munich Security Conference

When it comes to people's views on the best approach for dealing with China (Figure 1.11), little has changed since the last wave of research. It is still only respondents from Canada, Japan, and the United States, who are willing to oppose China economically. In contrast, respondents from European and BRICS countries continue to express reluctance. A country-specific risk that many perceive has recently grown is the risk of China invading Taiwan (Figure 1.12). Given growing threats from China, the share of respondents who think that an invasion of Taiwan poses a high risk to the world has increased substantially since early 2021.

Figure 1.13

Citizens' expectations about the risk posed by the coronavirus pandemic, November 2021, percent

● Increase ● Stay the same ● Decrease
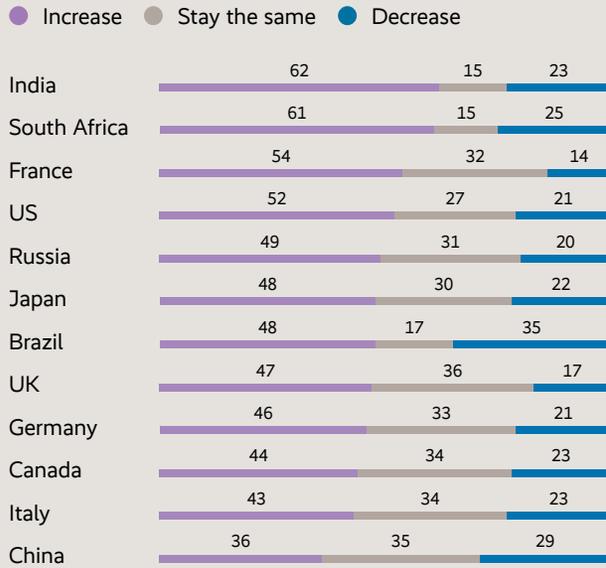
How do you think the risk to your country posed by the Covid-19 pandemic will change in the next year?

	Increase	Stay the same	Decrease
India	62	15	23
South Africa	61	15	25
France	54	32	14
US	52	27	21
Russia	49	31	20
Japan	48	30	22
Brazil	48	17	35
UK	47	36	17
Germany	46	33	21
Canada	44	34	23
Italy	43	34	23
China	36	35	29

Data: Kekst CNC, commissioned by the Munich Security Conference.
Illustration: Munich Security Conference

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On issue-specific risks, both changes and continuities are evident. According to the 12 countries surveyed, the risk of the coronavirus pandemic – although still high on everyone's risk ranking – has somewhat decreased. Clearly, respondents were not yet (or barely) affected by the Delta and Omicron variants during the polling. Yet, when asked how the risk Covid-19 poses to their country might change in the next year, most respondents in G7 and BRICS countries stated they expect the risk to increase (Figure 1.13). In China, which is holding on to a costly zero-Covid strategy that the government promotes with self-confident messaging, risk perceptions were lowest. However, existing concerns that China's approach may leave it less prepared for new variants are likely less present in Chinese public discourse.

Figure 1.14

Citizens' support for binding net zero emission targets, November 2021, percent

Do you agree or disagree that states should agree to binding targets to get to net zero CO_2 emissions?
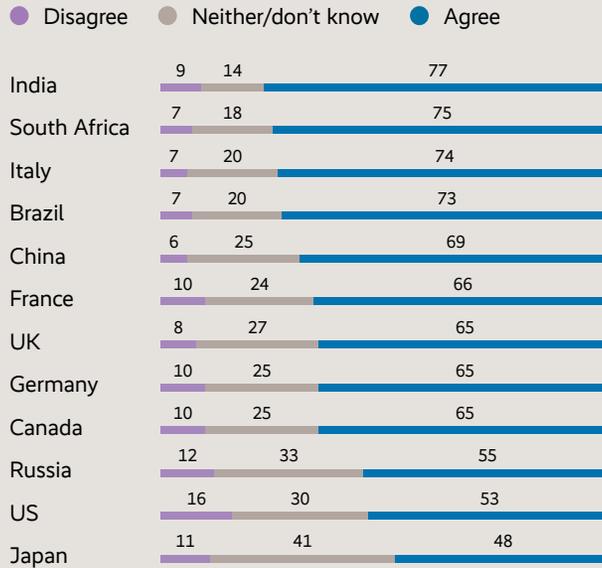
● Disagree   ● Neither/don't know   ● Agree

	Disagree	Neither/don't know	Agree
India	9	14	77
South Africa	7	18	75
Italy	7	20	74
Brazil	7	20	73
China	6	25	69
France	10	24	66
UK	8	27	65
Germany	10	25	65
Canada	10	25	65
Russia	12	33	55
US	16	30	53
Japan	11	41	48

Data: Kekst CNC, commissioned by the Munich Security Conference.
Illustration: Munich Security Conference

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Countries' worries about climate change, already a top concern during the last wave of research, has grown even further. Possibly linked to this, the support for binding net-zero emission targets, which was already strong in early 2021, has increased even more (Figure 1.14). However, given that distrust in other countries meeting their climate change obligations has also grown (Figure 1.4), this finding must be taken with a grain of salt.

Figure 1.15

Citizens' assessments of food shortages, share saying risk will increase, February/March and November 2021, percent

● February/March 2021 ● November 2021

Data: Kekst CNC, commissioned by the
Munich Security Conference.
Illustration: Munich Security Conference

A risk that has seen the most significant increase in concern since early 2021 is food shortages (Figure 1.15). This may well be the result of the Covid-19 pandemic accentuating the vulnerability of supply chains while also having increased food insecurity in many – even highly developed – parts of the world. In Western countries, the share of people who expect food shortages in their country to increase in the next year has risen significantly since the last wave of research. Brazil, India, and South Africa have also remained at very high levels.

(2) Losing Heart

What are the geopolitical implications of the West's retreat from Afghanistan, and what are the prospects for the country? Which lessons should the United States and its partners draw from the 20-year engagement? What does the US decision to leave Afghanistan indicate for its future role in the Middle East? And what does that mean for Europe and the transatlantic division of labor in Europe's neighborhood?

Losing Heart

Julia Hammelehle

Originally framed as a quick and easy victory, the Afghanistan intervention by the United States and its partners turned into a two-decade engagement that came with few successes but huge financial and human costs.[1] Just weeks before the last international troops were to exit Afghanistan, the Taliban swept back into power. Caught by surprise at the speed of the Taliban takeover, the US and its allies struggled to get their nationals and local partners evacuated. Desperate scenes unfolded at Kabul airport, with Afghans falling to their death as they tried to cling to the departing international planes.

The tragic end of the West's intervention in Afghanistan raises bitter questions about the purpose and outcome of the international efforts. More broadly, it confronts Western partners with basic questions about their ability to support nation-building and promote peace and stability in other parts of the world. For NATO, the experiences in Afghanistan highlight the need to reevaluate its role in out-of-area missions. As the withdrawal from Afghanistan also mirrors the declining strategic priority of the Middle East for the United States, it forces Europe to reflect on its willingness and ability to assume greater responsibility for crisis management in its neighborhood and work on a future-proof transatlantic division of labor.

All Built on Sand?

Over the past 20 years, the objectives of the international engagement in Afghanistan changed profoundly and grew in number and complexity.[2] In response to the 9/11 terror attacks, the US, supported by a coalition of allies, launched an intervention, targeting the perpetrators of the attack, Al Qaeda, and the Taliban regime that continued to harbor the terrorist group even after 9/11. After the quick toppling of the Taliban regime, the aim of the United States and the international community was to prevent a power vacuum, fearing that it could create the conditions for Al Qaeda and the Taliban to resurge.[3] Besides the US counterterrorism mission, an international assistance force, authorized by the UN Security Council, was set up. As envisaged at the UN-mediated conference in Bonn in December 2001, which established an interim Afghan government, the force was to assist Afghan authorities in the maintenance of security in Kabul and its surrounding areas. NATO, which had for the first and so far only time invoked Article 5 following the 9/11 attacks, took command of this assistance force in 2003.[4] The mandate of the initially mainly noncombat and geographically limited

"The withdrawal of troops must not result in the wrong forces gaining the upper hand in the country."[7]

Angela Merkel, then–German Chancellor, MSC Special Edition, February 19, 2021

mission was incrementally expanded. By 2006, it covered the whole country and the full scale of military operations as well as the aim of building a capable, stable Afghan state.[5] Beyond active military measures to counter terrorist forces, the objectives of the international engagement now also included creating effective and legitimate state institutions, training national security forces, and developing a stable economy.[6]

Measured against these aims, the achievements were limited. In terms of counterterrorism, the international partners did reduce the threat of another mass-casualty terror attack on the West by dismantling Al Qaeda in Afghanistan and fighting Al Qaeda cells in neighboring Pakistan from Afghanistan.[8] Yet transnational terrorist threats remain virulent today as jihadist groups have multiplied and spread across the globe.[9] Moreover, as evident in the Taliban's return to power, the Western allies failed to permanently weaken the Taliban and to create strong and legitimate Afghan political and security forces. Still, for the last two decades, the Western presence allowed Afghan civil society to flourish and provided for an "imperfect but non-murderous government for many Afghans, particularly urban, minority, and female."[10] Besides, the US and its partners achieved considerable improvements in areas such as healthcare and education (Figure 2.1). However, they did not meet the goal of building a sustainable economy. Afghanistan's finances remained heavily reliant on foreign aid – with around 75 percent of public spending covered by international donors in recent years[11] –, poverty and unemployment levels continued to be high, corruption remained ubiquitous, and drug production saw a steady rise.[12] Today, the economy is in free fall and the country on the brink of the "world's worst humanitarian crisis," with more than half of the population at risk of severe food insecurity.[13]

"This is not the time to turn our backs on the Afghan people. If we do, our collective failure will resonate for decades – as will the pain of millions of Afghans."[34]

Deborah Lyons, Special Representative of the Secretary-General for Afghanistan, UN Security Council, November 17, 2021

Figure 2.1

Socio-economic development in Afghanistan, 2000 and latest, selected indicators

● Worsening　　● No significant change　　● Improvement

Socio-economic indicator	2000	Latest
Life expectancy (Years)	55.8	64.8 (2019)
Under-5 mortality rate (Per 100,000 births)	128.7	60.3 (2019)
Access to basic drinking water (Percent of population)	28.2	75.1 (2020)
Access to basic sanitation (Percent of population)	21.9	50.5 (2020)
Expected years of schooling, total (Years)	5.9	10.2 (2019)
Expected years of schooling, female (Years)	0.6	7.7 (2019)
Labor force participation rate, total (Percent of population, 15 and older)	47.8	47.1 (2020)
Labor force participation rate, female (Percent of female population, 15 and older)	14.9	21.8 (2019)
Opium production (Hectares)	82,000	224,000 (2020)

Data: World Bank; UNDP; UNODC. Illustration: Munich Security Conference

A Defeat Foretold?

In light of the limited achievements in Afghanistan, hard questions arise about the West's general ability to build capable, legitimate state structures and promote stability in conflict situations. This is particularly true as the human and financial costs of the international efforts in Afghanistan have been staggering. At its peak, more than 130,000 international troops from 50 NATO and partner countries were engaged in Afghanistan (Figure 2.3).[14] The United States alone spent 837.3 billion US dollars on the military operation and 145 billion on reconstruction in the country.[15] Likewise, with nearly 180,000 people having lost their lives in Afghanistan – among them one-fifth of the estimated Afghan fighting force[16] – the death toll of the intervention is dire (Figure 2.2).

Figure 2.2
Number of fatalities in Afghanistan, 2001–2021

Category	Fatalities
Afghan military and police	69,095
Insurgents	52,893
Civilians	46,489
Contractors	3,917
US military	2,331
Other allied troops	1,144
Humanitarian/NGO workers	446
Journalists/media workers	74
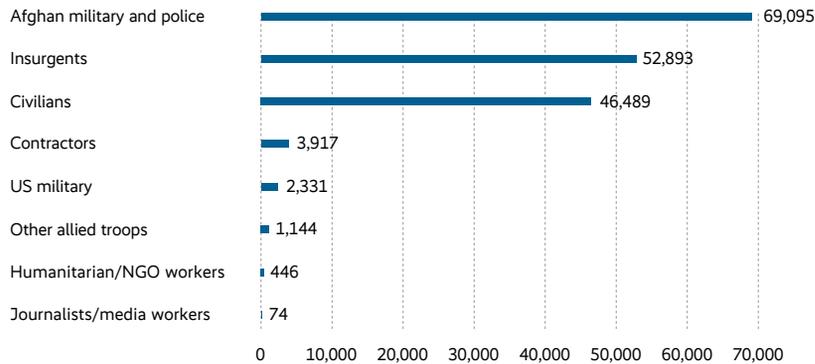
Data: Brown University, Watson Institute. Illustration: Munich Security Conference

When it comes to the dismal outcome of the international efforts, two views stick out. According to one, which emphasizes the adverse role of local factors, the aim of nation-building was "simply beyond [...] reach" of the West. According to the other, which focuses on the misguided approach of the US and its partners, the aim was right but was undermined by poor implementation.[17] Among the local factors that impeded the intervention's success are deep national divisions, residual sympathy for the Taliban, and permanent interference from Pakistan.[18] Furthermore, as Afghan authorities were often corrupt and ineffective, they were unable to earn the legitimacy needed for state structures to be stable.[19]

Others, however, argue that it was the policies of the US and its allies that critically exacerbated some of these adverse local factors, most notably by failing to insist on good governance and accountability.[20] Other major flaws in the strategy of the United States and its partners that undermined the efforts in Afghanistan include the profound incoherence of their policies,[21] the lack of understanding of Afghanistan's social, economic, and political dynamics, poor evaluation and monitoring, and a stark overestimation of the West's capabilities.[22] These structural deficits caused a "chronic misalignment of ends, ways, and means," including false timelines and a mismatch of military and civilian resources,[23] fueled corruption,[24] and led to the creation of political, economic, and legal institutions that were not supported by the Afghan population.[25]

Figure 2.3

Number of international troops in Afghanistan, 2001–2021

● US troops   ● Other troops
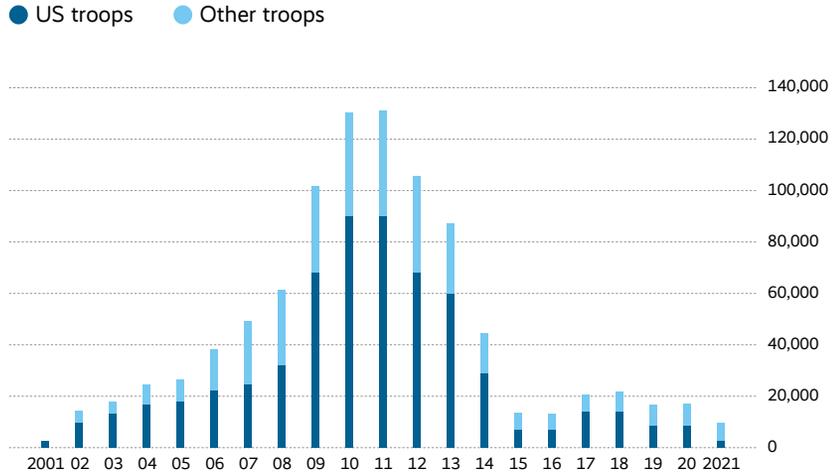
Data: Brookings Institution; Congressional Research Service; NATO. Illustration: Munich Security Conference

They furthermore resulted in a series of misguided tactical steps, beginning in 2001 with the US refusal to include the Taliban in the process of forming a new Afghan government,[26] and ending with the inglorious withdrawal. For some experts, by deciding to leave Afghanistan, the US and its allies missed the chance of a light, sustained footprint that could have kept the Taliban at bay and allowed for further progress on sustainable development.[27] Instead, the lack of a clear long-term commitment, overambitious goals, "delusions of maximalism," and finally a sense of helplessness prevented the West from finding a "middle path between ruinous overinvestment and total neglect."[28]

With the Taliban back in power, the West's influence over the political trajectory of Afghanistan is weak.[29] Options for Europe and the US to use their economic might to influence the Taliban's policies on political rights and civil liberties are limited – particularly as instruments like the suspension of external funding and sanctions on the Taliban further amplify the dire humanitarian situation.[30] In addition to exploring new ways of bringing funds into the country and working through international organizations,[31] experts and activists have urged Western partners to foster a joint international

"Many schools educating boys and girls were under Taliban control before Kabul fell. Focus on keeping them open rather than making girls' education a Western-imposed conditionality!"[33]

Ngaire Woods, Dean of the Blavatnik School of Government, University of Oxford, Munich Strategy Retreat in Elmau, December 4, 2021

approach and engage with the Taliban to alleviate the suffering of the Afghan people.[32]

Regarding the ripple effects that extend beyond the country, concerns are high that the victory of the Taliban will embolden terrorist groups in the region and jihadist cells worldwide.[35] Concerning the terrorist threats emanating from Afghanistan itself, as shown by data from the Munich Security Index 2022, 49 percent of respondents in Western countries see the establishment of a terrorist base of Al Qaeda or ISIS operating from Afghanistan as a high risk to the world.[36] While analysts disagree about the extent to which the terrorist groups will be able to (re)establish themselves in the country and attack the West from there,[37] they share the concern that the withdrawal from Afghanistan makes it much harder for the United States and its partners to effectively respond to a potentially rising terrorism threat.[38] With no US or partner forces on the ground, access to intelligence is limited and the accuracy of drone strikes is further hampered by the long distance to the next US base.[39]

As opposed to the geographically remote United States, Europe is "on the front line"[41] of possible spillover effects of the Taliban's seizure of power. Beyond a growing threat of terrorism, this includes the risk of rising levels of drug trafficking and forced migration. As Afghanistan's formal economy faces a total collapse, illicit economic sectors such as drug production are set to thrive.[42] Since Afghanistan accounts for 85 percent of global opium production and Europe is its biggest market,[43] higher production levels would be directly felt in Europe.[44] Given the severe humanitarian situation in Afghanistan, debates about a potential rapid rise in the number of refugees have surged in Europe. Yet, as the borders to Afghanistan's neighboring countries and the migration routes toward Europe are largely blocked, most Afghans will be forced to flee within the country or be stranded in Pakistan and Iran.[45]

Looking at the geopolitical dynamics, the West's exit from Afghanistan has strengthened the influence of regional actors such as Pakistan and Iran as well as of international competitors of the West such as Russia and China, who had kept informal diplomatic ties with the Taliban.[47] While these countries have publicly applauded the West's defeat and portrayed it as proof of the West's vanishing international influence and failed intervention policies, their attitudes to the Taliban takeover are highly ambivalent. Like other neighbors of Afghanistan, including Central Asian countries, they fear

"For 20 years, we were safer. We can bank that. It does not mean to say we will be in the future."[40]

Ben Wallace, UK Secretary of State for Defence, Defence Committee, House of Commons, October 26, 2021

"The major challenges in Afghanistan once again show that democracy imposed and transplanted by others will not last or be firm."[46]

Hua Chunying, Foreign Ministry Spokesperson and Assistant Foreign Minister of the People's Republic of China, press conference, August 20, 2021

profound spillover effects of an "emerging security black hole" and possible state collapse in their neighborhood.[48] To contain instability emanating from Afghanistan after the West's exit and to enhance their regional influence, both Russia and China have scaled up their presence in neighboring Central Asia[49] – with Russia further strengthening its role as the main security provider in the region.[50]

Seen through the lens of Sino-American strategic competition, some analysts interpret the US exit as a major opportunity for Beijing to make broad "economic and security inroads into Afghanistan and Central Asia."[51] Yet the geostrategic significance of Afghanistan for China will likely be limited. Although Afghanistan has a "treasure trove of minerals,"[52] these resources are hard to exploit. And as the economy and infrastructure are only poorly developed and political instability is high, the investment climate is frosty.[53] Politically, given Afghanistan's history as a "graveyard of empires," China will be wary of becoming deeply involved.[54] Finally, Beijing is acutely aware that the US seeks to use the resources it has freed up by withdrawing from Afghanistan for competition with China.[55]

Over the Horizon

The US decision to withdraw from Afghanistan illustrates a shift in US foreign policy that began several years ago: from the "Global War on Terror" as an overarching strategic priority to "a post-post-9/11 era," increasingly defined by strategic competition with China.[57] It also epitomizes the end of the US "unipolar moment" and the need for Washington to reduce its number of international commitments.[58] While some analysts welcome this development as a necessary recalibration of US foreign policy,[59] others fear that it means an embrace of US nationalism and isolationism.[60] From their perspective, the "retreat at any cost" from Afghanistan has confirmed this fear and raises questions about the willingness of the United States to intervene elsewhere in the world – including to protect human rights.[61]

For Europe and NATO, the experiences in Afghanistan and the inglorious exit raise both operational and strategic questions. As NATO sees military training and capacity building of local armed forces as the "best way to ensure stability in [its] neighborhood" and as a key pillar of the NATO 2030 agenda,[62] the poor results of its mission in Afghanistan provide important operational lessons for current and future training mandates, including for the one in Iraq.[63] Strategically, the fact that the decisions about the Afghanistan mission, including its end, were largely made by Washington alone – despite

"[O]ur true strategic competitors – China and Russia – would love nothing more than the United States to continue to funnel billions of dollars in resources and attention into stabilizing Afghanistan indefinitely."[56]

Joe Biden, US President, remarks at the White House, August 16, 2021

"The events in Afghanistan are not an invitation to withdraw from further international challenges. On the contrary, they should embolden Europe to deepen its alliances and strengthen its commitment – and ability – to defend its interests."[70]

Josep Borrell, EU High Representative for Foreign Affairs and Security Policy, The New York Times, September 1, 2021

the ripple effects for US partners engaged in the country – raises fundamental questions about the role of NATO as a political alliance and a place for consultation and strategic planning.[64]

As European partners proved unable to stay in Afghanistan without the US and failed to "change the decision calculus" of Washington,[65] the debate about Europe's capability to act in the realm of security and defense has been revived. With the Afghanistan exit forcefully highlighting the declining strategic relevance of the Middle East for the United States,[66] pressure on Europe is increasing to take more responsibility for managing crises in its surroundings.[67] Yet both political will and capabilities for greater European engagement have been missing in the past.[68] It thus remains unclear whether the Afghanistan experience will serve as a "wake-up call."[69]

Finding the Middle Path?

The withdrawal from Afghanistan marked an abrupt end of what has been a two-decade engagement of Western allies in the country. Over these 20 years, the endeavor of nation-building has been undermined by deep flaws in the approach of the US and its allies as well as by factors beyond their control. While the Afghanistan experience offers a cautionary tale about the complexity of nation-building, it also provides the chance to learn from the mistakes that were made. For the transatlantic partners, it could serve as a starting point for a clear-eyed discussion about the design and scope of current interventions, such as in Mali (Chapter 3), and future ones – including a new division of labor among them. Rather than losing heart, they must confront the sense of helplessness and explore the many options available between overreach and full retreat.

Key Points

1 The prospects for Afghanistan's political, social, and economic development are dim. The country is on the brink of the world's worst humanitarian crisis and civil liberties are severely restricted under Taliban rule.

2 After the withdrawal of the United States and its allies, Afghanistan's neighbors and Western partners alike share concerns about possible spillover effects emanating from Afghanistan, including a growing threat of terrorism and rising levels of drug trafficking and forced migration.

3 While the Afghanistan experience highlights the complexity of nation-building and promoting stability abroad, it also provides the chance to learn from the mistakes that were made and draw lessons about the design and scope of current and future interventions.

4 As the decision to leave Afghanistan mirrors the declining strategic priority of the wider Middle East for the US, it forces Europe to reflect on the future division of labor between the transatlantic partners and its own willingness and ability to assume greater responsibility.

Mali and the Sahel

3 Commitment Issues

What do the withdrawal from Afghanistan and the subsequent discussions over the future of interventions mean for the international community's engagement in the Sahel region? What challenges does the international community face in Mali and its surrounding areas? What has been achieved so far? Which improvements are needed to achieve stability in the region?

Commitment Issues

Isabell Kump

Since 2013, the Sahel region has seen a massive increase in the engagement of international actors in peacebuilding activities (Figure 3.1): from the United Nations (UN), the European Union (EU), the African Union, and the Economic Community of West African States (ECOWAS), to Algeria, the United States, and France. The focus has been on Mali, which has become the epicenter of the region's growing security and humanitarian crises since the state almost collapsed in 2012.[1] At that time, the protracted dispute between the government and the ethnic Tuareg people in the north of the country escalated and resulted in a separatist insurgency led by Tuareg and Arab groups and a coup d'état against Mali's then-government.[2] Yet despite increasing international engagement and the conclusion of a peace accord between the government and insurgents in 2015, the country remains divided. The state is largely absent from northern and central Mali, where armed groups often fill the void.[3] Since 2013, the security situation has continuously deteriorated, provoking a regional crisis. Violence and terror attacks have spread to Mali's neighbors Burkina Faso, Chad, and Niger. Against this backdrop, concerns are being raised whether Mali is becoming a new Afghanistan – a sanctuary from which international terrorists carry out their attacks.[4]

Since international troops have withdrawn from Afghanistan, more parallels are being drawn between the interventions in the Sahel region and Afghanistan, resulting in pleas to rethink or end international operations in Mali and its surroundings.[5] Yet debates about the effectiveness of the interventions in the Sahel region predate the retreat from Afghanistan. These discussions are particularly common in France and Germany, two of the main external actors involved in the Sahel region. In France, debates on how to reduce the country's military footprint have been going on for some time now. They have been further intensified by growing doubt about the effectiveness of Operation Barkhane – France's counter-terrorism mission in the region. After the most recent military coup in Mali in May 2021, France announced to scale back this operation.[6] The deployment of Russian mercenaries, the Wagner Group, only added to the frustration – both in Paris and Berlin.[7]

This also shows that other actors, such as Russia, whose intentions for the region are not in line with European interests of peace, stability, and good governance, stand ready to exploit a potential reduction of European

Figure 3.1

International efforts in the Sahel, 2021

Legend:

- G5 Sahel countries
- G5 Sahel Joint Force focus areas
- ★ Permanent Secretariat of the G5 Sahel
- EU Capacity Building Missions (EUCAP) and EU Training Mission (EUTM)
- MINUSMA field offices/headquarters
- Operation Barkhane (France)
- Task Force Tabuka
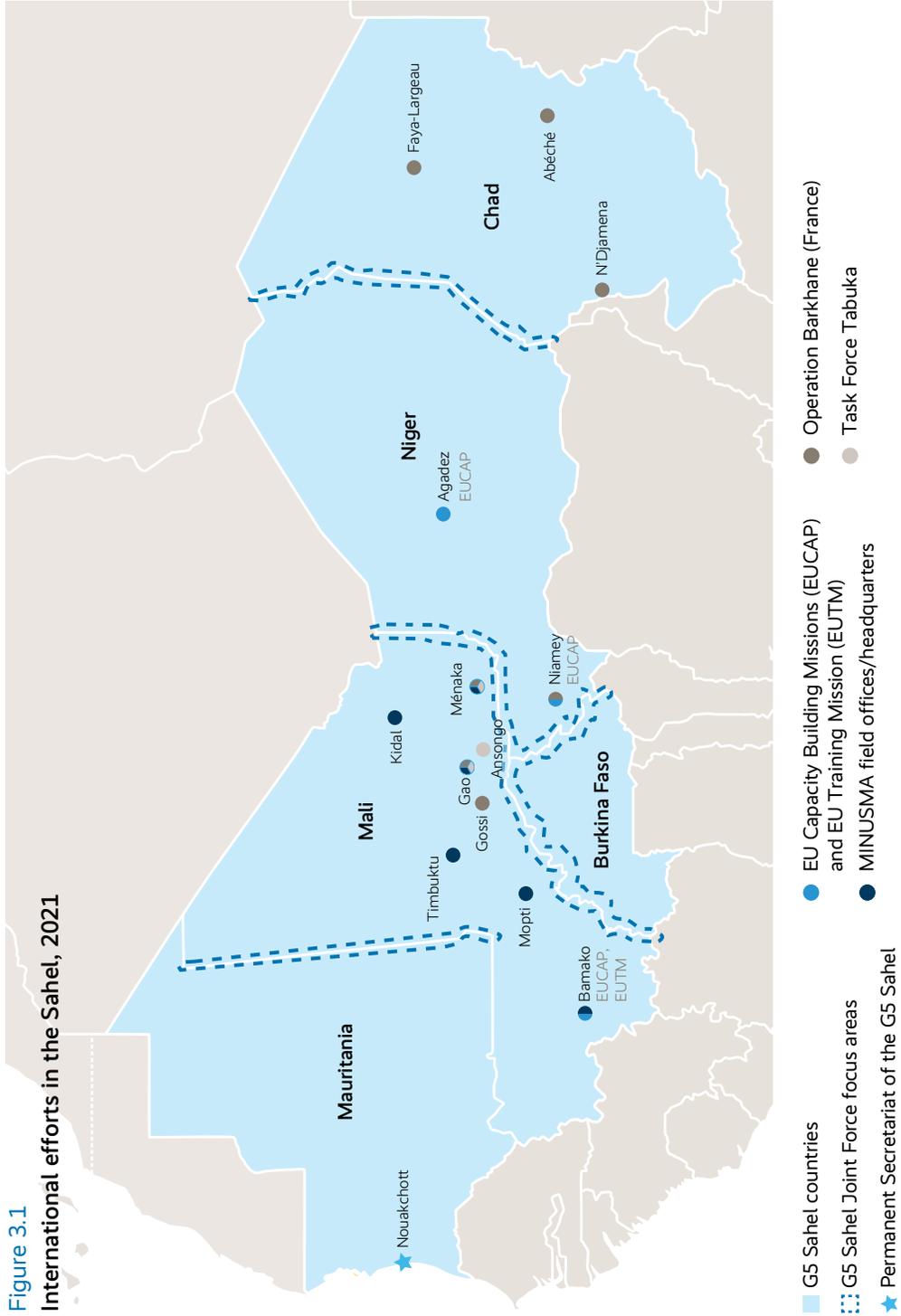
Data: Center for International Peace Operations. Illustration: Munich Security Conference

engagement – and that Malian leadership is open to new partnerships.[8] The deployment of Kremlin-linked mercenaries could further destabilize the region, as the Wagner Group is already accused of committing human rights abuses in Libya, Sudan, and the Central African Republic.[9] From a European perspective, this scenario shares similarities with other parts of its neighborhood, including the Western Balkans and Eastern Europe, where Russia is believed to be destabilizing countries to distract and debilitate the EU.[10]

Apart from the risk of increased Russian engagement, the international community is faced with two fundamental dilemmas, comparable to those in Afghanistan and the Horn of Africa. First – although the Malian government has been a difficult partner for the international community – ending support for Mali would risk peace and stability beyond the Sahel region and have significant implications for western and northern Africa and Europe. The tone of West African states has already sharpened toward Mali, as the transitional authorities headed by the leader of the 2021 military coup and transitional president, Assimi Goïta, announced the rescheduling of elections from February 27, 2022 to the end of 2026.[11] This would prolong Mali's political transition significantly and affect approaches to stabilize the country – and has now led ECOWAS to impose additional sanctions.[12] Second, addressing violence in the region is essential for the success of long-term efforts, such as development cooperation and the promotion of human rights. However, as long as the root causes of the insecurity, including poor development, human rights abuses, and corruption, remain unaddressed, violence and terror attacks will continue to spread.

More Security Initiatives Have Not Improved Security

While international actors engage in a broad range of activities – including development cooperation, diplomacy, counterterrorism, and security sector reform – increasing levels of violence in Mali and neighboring states have made security provision their main concern. Numerous operations aim to create security in the region, including Operation Barkhane, the G5 Sahel Joint Force, and the EU's security and military training missions. In addition, there is growing competition in security sector assistance as Turkey, China, and Russia are joining this field,[15] contributing to a "security traffic jam"[16] in the region.

Figure 3.2

Number of personnel in missions and operations and internally displaced persons in the Sahel region

● Personnel in missions
and operations, 2013–2020

— Internally displaced
persons, 2016–2020
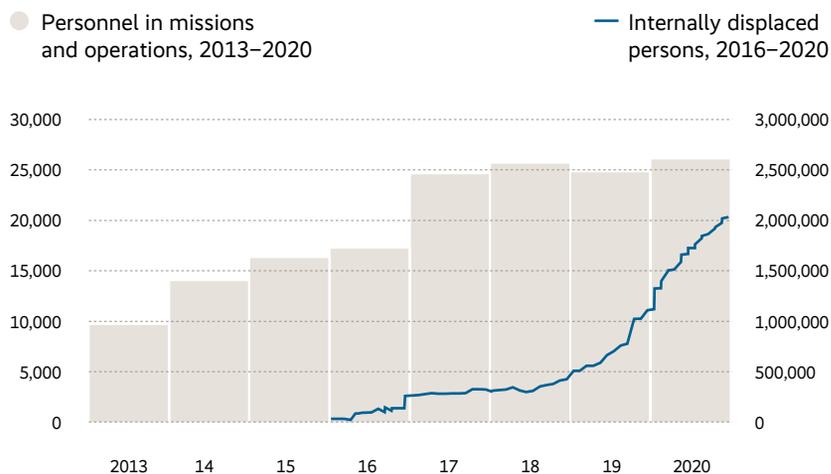
Data: UNHCR; SIPRI. Illustration: Munich Security Conference

Despite the involvement of many actors and investment of significant resources in security initiatives, the Sahel region has become even more unstable (Figure 3.2).[17] Casualties from terrorist attacks in Burkina Faso, Niger, and Mali increased from 770 fatalities in 2016 to over 4,000 in 2019.[18] Within just two days in December 2021, 140 people were killed by terrorist attacks in Mali and Niger.[19] Thus, the operations tasked with combatting terrorism, including Operation Barkhane and the G5 Sahel Joint Force of the regional cooperation framework G5 Sahel, have neither been able to contain terrorist-affiliated groups nor improved the security of the region's populations.[20] Successes, like the killing of the leader of Al Qaeda in the Islamic Maghreb, Abdelmalek Droukdel, remain limited.[21]

On the Waiting List

Due to the intense focus on addressing high levels of violence through counter-terrorism and military force, other goals have moved into the background. These include fostering development, strengthening state capacities, and promoting human rights, the rule of law, good governance, and democracy.[22] Consequently, root causes of the region's crises, such as poor development, human rights abuses, corruption, and the inability of the region's governments to provide their citizens with essential public goods, like education, receive comparatively little attention from international actors.[23] Yet experts argue that lasting peace and security in the Sahel region will not be achieved without sufficiently considering these destabilizing factors.[24]

The G5 Sahel and the EU initially followed more comprehensive approaches to the Sahel region's crises than simply emphasizing security considerations. Originally, Chad, Mali, Mauritania, Niger, and Burkina Faso established the G5 Sahel to jointly address a broader range of regional challenges including poor development and insecurity. Now, the G5 Sahel focuses almost entirely on fighting insecurity through military force.[25] Furthermore, the EU officially acknowledges that investments into development and security are needed to achieve stability in the Sahel region. Yet since 2015, its focus has shifted from long-term goals like boosting economic development and building stable state structures to short-term activities relating to migration management and counterterrorism.[26]

Meanwhile, the UN Multidimensional Integrated Stabilization Mission in Mali (MINUSMA) has difficulties fulfilling its more comprehensive mandate. Its staff have become a target of attacks, making it the most dangerous UN mission deployed to date.[28] It is increasingly occupied with defending its own infrastructure and personnel against attacks from rebel groups.[29] As a result, MINUSMA has taken an approach primarily focused on stabilization, crisis management, and force protection. This leaves fewer resources for other core tasks included in its mandate, such as the protection of civilians and support for the restoration of state authority.[30]

The Bamako Government: A Difficult Partner

Even before the Malian government started talks with the Russian Wagner Group, it had been a difficult partner for the international community, showing reluctance to introduce reforms and having state officials allegedly involved in corruption.[31] There have only been a few successes in implementing the peace accord six years after its conclusion, such as the establishment of interim administrations at the local level in northern Mali and progress on demobilizing combatants.[32] The Malian government is still unable to ensure security for its own population, and continues to outsource security provision to international actors.[33] Despite the EU supporting the Malian security and military forces through training and capacity building, including via the EU Training Mission (EUTM) in Mali, the Malian government does not match those efforts with substantive institutional reforms in the security sector.[34] Moreover, state forces have become part of the security problem in Mali, as there are reports of repeated human rights abuses.[35] Particularly alarming is that in 2020, more civilians died through violence committed by state forces than by rebel groups or militias (Figure 3.3).[36] This further erodes public trust in state authorities, resulting in new grievances that also undermine international stabilization efforts.[37] It is becoming increasingly clear that lasting stability will not be achieved as long Malian leadership refuses to implement reforms and prosecute state forces abusing human rights.

"It is disturbing that civilian populations are also suffering violence from the Malian defense and security forces (FDSM) that are supposed to protect them."[38]

Alioune Tine, UN Independent Expert on the human rights situation in Mali, August 2021

Figure 3.3

Civilian deaths as a result of violence by various perpetrators, 2020

● Militias ● Rebel groups ● State forces ● Unknown

	Militias	Rebel groups	State forces	Unknown
Burkina Faso	184	434	377	80
Mali	296	234	339	87
Niger	12	241	147	20
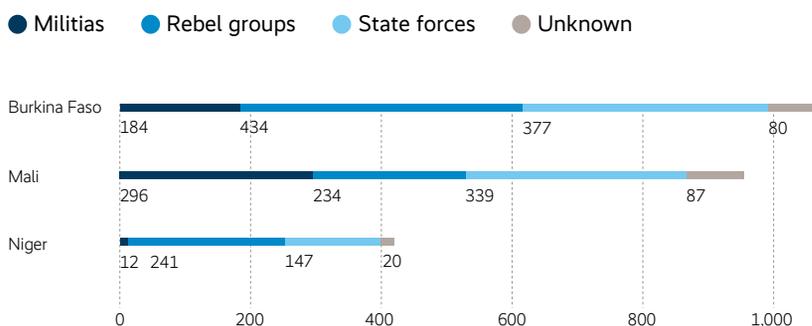
Data: ACLED. Illustration: Munich Security Conference

ACLED

Where Do We Go From Here?

The last years of international intervention have shown that the intense focus on security provision has proven ineffective in solving the Sahel region's crises. Most importantly, external actors have not paid sufficient attention to the root causes of the crises afflicting Mali and the Sahel region. Without adopting a more holistic approach that also ensures progress on development, the protection of human rights, good governance, and respect for the rule of law, lasting peace will be hard to achieve. Achieving these goals also requires a stronger commitment by the Malian government and other governments in the region. International actors face difficult questions on balancing security provision, making progress on other core goals, and engaging the Sahel countries' governments in favor of sustainable peace and stability in the region. It is high time to thoroughly review the international engagement in Mali and the Sahel region. But discussions should be centered on how to make international efforts more effective rather than on whether to continue them at all.

Key Points

1. Since 2013, the Sahel region has seen increasing engagement of international actors, operating through various mechanisms with different agendas and mandates to facilitate peace.

2. With the deployment of Russian mercenaries in Mali, external actors fear that the region will be destabilized further.

3. The Malian government has been a difficult partner for the international community. Yet its engagement in promoting institutional change, the rule of law, human rights, and security sector reform is indispensable to achieving lasting peace and security in the entire Sahel region.

4. Addressing violence and terrorism in the region is vital for the success of long-term efforts, including promoting human rights and development cooperation. However, to achieve lasting peace and stability in the Sahel region, external actors will also have to adopt more comprehensive approaches that prioritize security provision, development cooperation, and promote human rights, good governance, and the rule of law.

Horn of Africa and the Arabian Gulf

4 Red Sea Alert

As crises in the Red Sea region mount, how does the West fare in shaping the political dynamics in this conflict hotspot? Is it capable of acting and able to pursue its interests in peace and security, migration management, and freedom of navigation? How does growing engagement by regional and international powers affect Western efforts in the region? And how can Europe, the United States, and like-minded partners move forward?

Red Sea Alert

Luca Miehe

The Red Sea is more than a body of water separating Africa from Western Asia. In the region encompassing the Horn of Africa and the Arabian Gulf,[1] the headwinds for international stabilization efforts are growing stronger. After a period of democratization and hope for regional reconciliation, a profound destabilization is now evident in the Red Sea region. Complex security threats have direct implications for Western interests, such as respect for human rights and international law, migration management, and free trade routes. At the same time, the region is of growing geopolitical interest to various regional and international powers, especially as the United States reduces its engagement in the wider region. Against the backdrop of modest Western stabilization successes and humanitarian crises of historic proportions, a closer look at the challenges, achievements, and ways forward is necessary.

Red Sea in a Chokehold of Challenges

Stretching from the busy Suez Canal through the narrow Bab el Mandeb Strait into the Gulf of Aden, the Red Sea is "the most important sea trade route between China and Europe"[2] and a "major choke point of international trade"[3] (Figure 4.1). Around 80 percent of all traded goods worldwide are transported by sea,[4] with more than one-tenth thereof passing through the Red Sea.[5] The vulnerability of this vital trade artery was showcased in March 2021, when the *Ever Given* megaship blocked the Suez Canal for six days, causing a holdup in goods costing 9.6 billion US dollars in trade per day.[6]

But the region's strategic relevance is not confined to trade. It is also a major hub for extremists, harboring, among others, Al Qaeda's largest global affiliate in Somalia under the banner of Al Shabab.[7] Tens of thousands of migrants transit annually from the Horn of Africa, mainly from Ethiopia or Somalia, via the narrow waters to Yemen and onwards to the Gulf on what the United Nations calls the "world's busiest maritime [migration] route."[8] What is more, the Red Sea is an important security link between the Mediterranean, the Middle East, and the Indo-Pacific, allowing a "swift naval transit across different operational theatres."[9]

"We are not as worried as we should be."[10]

Lia Quartapelle Procopio, Member of the Committee on Foreign and Community Affairs, Italian Parliament, Munich Strategy Retreat in Elmau, December 6, 2021

Figure 4.1
Selected military bases and choke points for global trade in the Red Sea region, 2021

● Military base   ○ Choke point for global trade
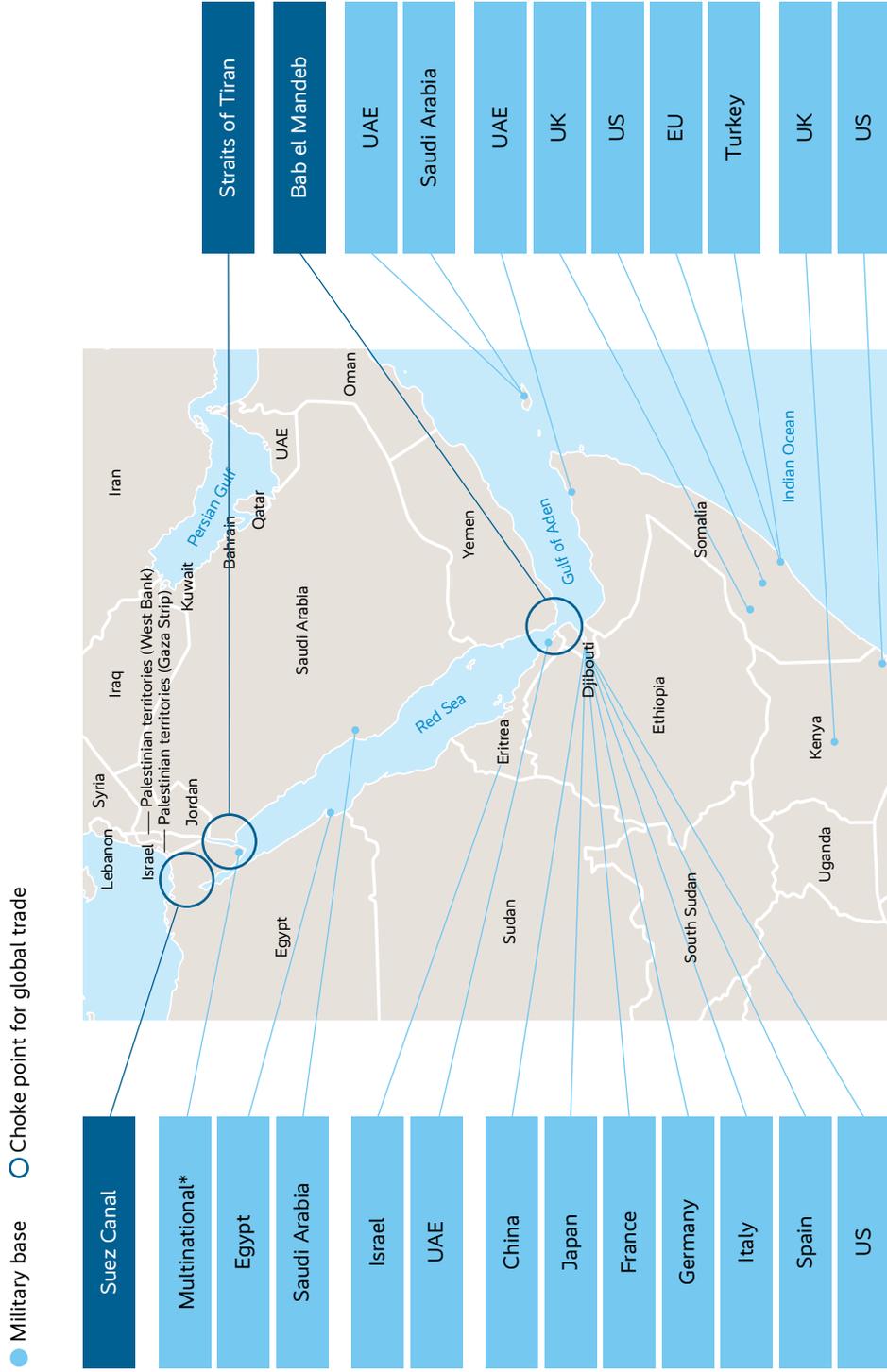
*Multinational Force and Observers (MFO)

Data: SIPRI; The Africa Report; The Washington Institute. Illustration: Munich Security Conference

Yet the Red Sea is marred by conflicts. Since November 2020, civil war engulfs Ethiopia's northern Tigray region, causing a large-scale humanitarian emergency.[11] At the same time, border skirmishes between Ethiopia and Sudan have intensified, a military coup derailed Sudan's democratic transition, the war in Yemen continues, an election crisis engulfs Somalia, and South Sudan's political volatility remains high.[12] This picture is complemented by a deadlocked dispute over the use and distribution of the Nile's water.[13]

Rough Seas in the Red Sea

The Red Sea's ills are cause for skepticism about the West's ability to promote peace and security in this conflict hotspot. While Europe and the US have notably contributed to ensuring free and open trade routes, the overall picture of Western achievements in the realms of atrocity prevention, promotion of good governance, and security provision is much more mixed.

After the onset of fighting in northern Ethiopia between the Ethiopian army and its allied forces on one side and rebel forces led by the Tigray People's Liberation Front on the other,[15] officials from Europe and the US were united in their condemnation of the humanitarian emergency that resulted from the civil war.[16] At the same time, the international community once again appears helpless in the face of ongoing violence and a "man-made" famine that threatens the lives of hundreds of thousands and according to USAID stems

Figure 4.2

Number of internally displaced persons in the world's ten largest internal displacement crises, 2020, millions

● Red Sea region   ● Rest of the world

Colombia	8.3
Syria	6.7
Democratic Republic of the Congo	5.2
Yemen	4.0
Somalia	3.0
Afghanistan	2.9
Ethiopia	2.7
Nigeria	2.6
Sudan	2.6
South Sudan	1.6
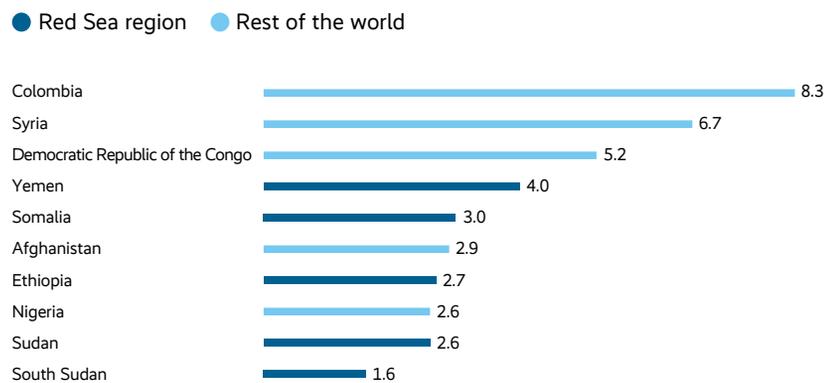
Data: UNHCR. Illustration: Munich Security Conference

from the disruption of food supply and an aid blockade by government-allied forces.[17] The failure of multilateral forums to stop mass violence in Tigray is compounded by the inability of international organizations to deliver humanitarian services to the conflict-torn region.[18]

The same holds true elsewhere in the Red Sea region. In places like Yemen or Darfur, violence is raging and tangible progress toward stabilization is not being made. Since fighting between the Houthi rebels and the Saudi-backed government began in Yemen in 2015, 10,000 children have been killed or maimed.[19] And in Darfur, up to 250,000 people have been displaced by resurging violence in 2021.[20] They are part of the Horn of Africa's internally displaced population of more than ten million[21] – a fifth of all displaced persons worldwide (Figure 4.2).

Europe and the United States have allocated substantial resources to secure peace in the region. There are more UN peacekeeping missions in the Horn than in any other region of the world, with the US being their "largest single donor" in financial terms.[23] The US has chosen the Red Sea's western shore for its only permanent military base on the African continent. From there, it plans to continue counterterrorism operations in the post-Afghanistan era, especially in Yemen, Somalia, and the Swahili Coast.[24] For its part, the European Union is the "largest humanitarian and development donor" in the Red Sea region[25] and the biggest donor to the African Union Mission in Somalia.[26] It is also running three Common Security and Defence Policy missions and operations in the Horn.[27] Yet looking at the region's multiple crises, including the war in Tigray and the border conflict between Ethiopia and Sudan, experts assess that "the degree of volatility in the Horn indeed appears higher than at any time in recent years."[28]

The West's ability to promote the rule of law and human rights and assist in strengthening governance structures has also proven to be limited. Importantly, the democratization processes in Ethiopia and Sudan that began in 2018 and 2019, respectively, received substantial assistance from European capitals and Washington, as witnessed by various European-led partnership conferences.[29] Against the backdrop of civil war in Ethiopia and the military coup in Sudan,[30] these Western-supported democratic transitions are now facing severe setbacks.

"The conflict in Ethiopia has now been going on for a full year. [W]e really remained silent for too long."[22]

Linda Thomas-Greenfield, US Ambassador to the UN, UN Security Council, November 8, 2021

"Studies show the average modern civil war now lasts 20 years. I repeat: 20 years. A multi-decade civil war in Ethiopia would be disastrous for its future and its people."[31]

Jeffrey Feltman, then–US Special Envoy for the Horn of Africa, November 1, 2021

Western efforts also included diplomatic engagement to defuse regional tensions. This aimed at cushioning the Horn of Africa from Middle Eastern rivalries. The diplomatic rifts between Saudi Arabia and the United Arab Emirates (UAE) on one side and Qatar and, by extension, Turkey on the other have also shaped the Horn's conflicts in Somalia, Sudan, and Ethiopia, where both camps are competing with each other through a "flurry of new economic and military investments."[32] The region clearly demonstrates that external actors' stabilization efforts are highly dependent on the goodwill of and cooperation from local stakeholders and regional actors. Calls by the EU and others for a regional security architecture, which could institutionalize conflict management, have yet to be heeded.[33] And despite continuous support for regional integration in Africa, the African Union, and the Intergovernmental Authority on Development (IGAD), "the regional bloc tasked with confronting regional crises"[34] appear unable to resolve the region's conflicts.[35]

"The lack of a common security architecture for the Horn of Africa and fragmentation make it much easier for outside interventions to destabilize this region."[36]

Annette Weber, EU Special Representative for the Horn of Africa, Manama Dialogue, November 21, 2021

Figure 4.3

Piracy and armed robbery against ships, 2005–2020, number of actual and attempted attacks

● Red Sea region   ● World
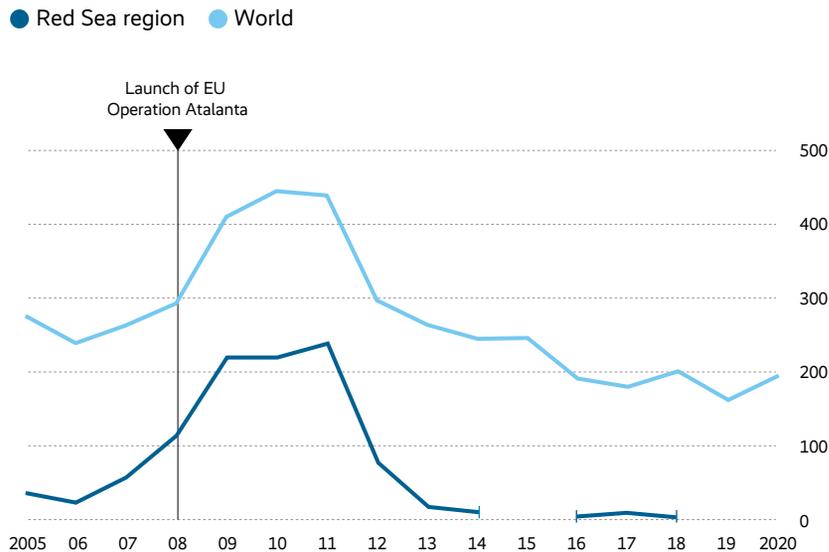
Data: International Chamber of Commerce – International Maritime Bureau.
Illustration: Munich Security Conference

Ultimately, some achievements can be noted in maintaining freedom of navigation. Since the peak of piracy attacks in the Red Sea region some 15 years ago, the number of attacks has been quelled by the EU maritime Operation Atalanta (Figure 4.3).[37] However, the drivers of piracy in the region – namely, grinding poverty, unemployment, and governance deficits[38] – have not been eradicated. At the same time, factors such as climate change act as catalysts for further risks. Moreover, other maritime threats persist.[39] For instance, an attack on shipping routes by the Yemen-based Al Qaeda offshoot "remains a real possibility."[40] Furthermore, the establishment of hybrid military and economic facilities at the Horn by major regional and international powers like Saudi Arabia, the UAE, and also China, the United States, and Turkey could create tensions regarding the control of maritime trade routes (Figure 4.1).[41] In light of the increasing attention from external actors on the Red Sea region, the headwinds for the transatlantic partners are growing stronger.

A Way Forward in the Red Sea

If Europe, the US, and the international community fail to work together to respond decisively to the mounting crises in the Red Sea – a region with high strategic relevance for Western interests in combatting terrorism, securing fragile democratization processes, ensuring free trade, and managing migration – the repercussions will not be limited to the region; they will be felt far beyond it. The West may be tempted to turn inward and engage in lengthy reviews of strategic mistakes made during its two decades of engagement in Afghanistan. However, the situation in the Red Sea region demonstrates one thing: conflicts around the world are not waiting. Already today, their ripple effects are affecting the West in various ways. In addition, mounting fragility draws in regional spoilers in their pursuit of agendas that often conflict with those of the West. If the international community fails to find the right responses to the challenges in the Red Sea region – in close cooperation with regional stakeholders – the prospects for future attempts to build peace and stabilize conflicts abroad will be dim.

Key Points

1. As the Red Sea region is home to vital global trade routes, mounting crises, and growing engagement by regional and international powers, Western stabilization efforts are put to the test.

2. Recent developments in the Horn of Africa and the Arabian Gulf give rise to skepticism about the West's ability to foster peace and security in Europe's extended neighborhood.

3. While conflicts in places like Ethiopia and Yemen spiral further out of control and democratic openings in the region are facing setbacks, Western achievements in the region are limited. Only in the fight against piracy has there been success.

4. The situation in the Red Sea region demonstrates that conflicts around the world are not waiting for the West to draw its lessons from Afghanistan. Ripple effects of conflicts in the Horn of Africa and the Arabian Gulf are already being felt far beyond the region.

5 Unquiet on the Eastern Flank

What is behind Russia's threatening behavior in Eastern Europe? What does Moscow intend to achieve with its proposals for new security treaties? Is major war possible or even likely in Europe? What can be done to defuse tensions, promote de-escalation, and pave the way for a long-term solution? Will NATO and the European Union be able to articulate and defend a common position?

Unquiet on the Eastern Flank

Tobias Bunde

It has been a disquieting year in Eastern Europe. From the Baltic Sea to the Black Sea, a series of crises has raised concerns, turning into outright alarm with the concentration of an estimated 100,000 Russian troops near the Ukrainian border and increasingly shrill rhetoric coming from Russia's leadership at the end of 2021. In December, President Vladimir Putin criticized the discrimination of Russian speakers in Ukraine and said that "what is happening in Donbass [...] certainly looks like genocide,"[1] while Defense Minister Sergei Shoigu claimed US mercenaries in Ukraine were planning a chemical attack.[2] Before Christmas, the Russian government submitted drafts for two new security treaties to be concluded with the United States and NATO, respectively. The drafts include several provisions that Moscow knows the West cannot accept.[3] At the same time, the Russian leadership made it clear that it expects an answer soon. This combination of saber-rattling on the border of Ukraine, rhetorical escalation, and a diplomatic ultimatum with unfulfillable conditions has analysts and politicians wondering whether Russia really is preparing a major invasion. Even leading Russian observers note that it suggests "the Kremlin is creating a pretext by which it can freely revise the existing system of relations – a step for which it apparently feels the time has come."[4] Is Russia ready and willing to go to war? Is it just another high-risk bluff?

"[The US and NATO] are to blame for what is happening in Europe now, for the escalation of tensions there. Russia had to respond at every step, and the situation was continuously going from bad to worse. It was deteriorating all the time. And here we are today, in a situation when we are forced to resolve it [...]."[5]

Vladimir Putin, Russian President, Expanded Meeting of the Defense Ministry Board, December 21, 2021

What is certain, though, is that the developments of the past year or so demonstrate that the status quo in Eastern Europe is increasingly fragile. For the past few years, many in Western Europe and North America, while certainly hoping for a different outcome, seemed to have gotten used to the unfortunate situation along NATO's eastern flank in general and the stalemate in eastern Ukraine in particular. Major NATO member states were preoccupied with other crises – and the situation in Donbass was wrongly assumed by many to slowly becoming another "frozen conflict" in the post-Soviet space, despite claiming more than 14,000 victims since 2014. Yet Putin, who appears to believe that he can change the status quo to his benefit, has forcefully placed the region and its challenges on top of the Western security agenda again.

Moscow's World

Many Europeans are struggling to make sense of Russia's behavior, which politicians in the EU and NATO often describe as "irresponsible" or

"incomprehensible."[6] Indeed, it contradicts European expectations of appropriate behavior for a member of the Euro-Atlantic community. Yet from the Kremlin's perspective, Russia is not a state like any other – and it must not become one. Putin's Russia is clearly not interested in being seen as a responsible neighbor and could not care less about crossing supposed red lines – at home and abroad. It has not only annexed parts of Ukraine and stationed troops in parts of Georgia and Moldova; a long list of revelations demonstrates that Russia has also committed several hostile acts in the territories of EU and NATO countries in recent years. Examples include the "Tiergarten murder" in Germany's capital in broad daylight, which, a German court in December 2021 concluded, "was committed on behalf of government agencies of the Russian Federation";[7] a considerable number of disinformation campaigns trying to influence democratic elections and cyber-hacks, which could be traced back to Russian units;[8] or the 2014 explosions at a Czech ammunition depot, which the Czech government attributed to an elite Russian spy unit.[9] Likewise, the poisoning and imprisonment of opposition leader Alexei Navalny, the constitutional changes that allow Vladimir Putin to serve until 2036, and the attacks on freedom of the press in Russia demonstrate that Russian leadership does not share the understanding of "a common European identity" based on liberal-democratic principles and human rights. The West needs to reckon with the fact that such decisions, contradicting norms of acceptable behavior at home and abroad, are a feature, not a bug, of Russian policy today.

Deeply dissatisfied with the post-Cold War developments in Europe, which meant a loss of status for Moscow, Putin and his government demonstrate that they do not want to play by the rules that they believe were imposed by the West when Russia was weak.[10] What the West understood as a mutually beneficial framework for cooperation based on jointly agreed-upon rules is seen by Russia as a Western-dominated system in which Russia has no proper place.[11] The renewed debate on NATO enlargement – most notably about the promises made or not made at the end of the Cold War – illustrates the different perceptions that exist in Russia and the West.[12] "In Mr. Putin's telling," historian Mary Elise Sarotte explains, "Russia lost its former status not because of the Soviet collapse but because it was cheated by the West – an easier narrative to accept."[13]

Now, with the US and Europe preoccupied with other internal and external challenges, "Russia is tempted to take advantage of Europe's rift to correct the military-political results of 30 years ago," as *Russia in Global Affairs*

"I think what happened a few years ago when Ukraine was invaded, it's not a failure of diplomacy, it's a failure of our collective credibility vis-à-vis Russia. [...] It was a failure of a naive approach vis-à-vis Russia. I'm [...] definitely in favor of discussion with Russia [...]. But I think that when we put red lines, we have to be sure to be credible and to make these red lines respected by the others."[18]

Emmanuel Macron,
French President,
interview on "Face the Nation," April 17, 2021

Editor-in-Chief Fyodor Lukyanov explains.[14] Indeed, Putin has repeatedly made clear that he sees the dissolution of the Soviet Union as the key geopolitical catastrophe of the 20th century, paving the way for Russia's decline and chaos in the region once dominated by the Soviet Union.[15] Illustrating Moscow's disparaging view of independent nations, Foreign Minister Sergey Lavrov even referred to NATO as "a purely geopolitical project aimed at taking over territories orphaned by the collapse of the Warsaw Treaty Organization and the Soviet Union."[16] As Angela Stent, one of the most experienced Russia analysts in the US, notes, "the core driver of Putin's world is the quest to get the West to treat Russia as if it were the Soviet Union."[17]

In the view of many Russians (and certainly in the view of Russia's leadership), Putin has returned the country to an international position of strength. The price for that strength is the consolidation of what former Senior Director for European and Russian Affairs on the National Security Council Fiona Hill calls "a personalized and semi-privatized kleptocratic system that straddles the Russian state and its institutions and population."[19] But as numerous analysts point out, Putin's efforts to defend his authority at home are inseparable from his attempts to renew Russia's control of its "near abroad."[20] Putin is, arguably, not so much threatened by potential NATO security guarantees for independent states but as successful democratic countries in Russia's neighborhood.[21]

As the Russian draft proposals for new security treaties make clear, the Kremlin insists on a "sphere of influence" in the post-Soviet space, which also means that its neighbors cannot be fully sovereign. The drafts not only call on NATO to exclude any further enlargement and thus end its long-standing open-door policy, they also want to roll back any developments since 1997, when NATO made the decision to admit the first round of former members of the Warsaw Pact. Any NATO troops deployed to those member states should be withdrawn.[22] Russian leadership thus wants to turn back the clock. It envisages a "post-West order" in which a few great powers, serving on a "global board of directors,"[23] have special status and divide the world into spheres of influence, in which they have special rights. Repeated references to the original UN system, to Yalta, or to a concert of powers, as well as the Russian preference to talk to the United States to discuss issues of European order, only underline this world view.[24]

Figure 5.1

Public perceptions of Belarus, Russia, and Ukraine among European NATO members, share saying country is an ally minus share saying country is a threat, November 2021, percent

	Belarus	Russia	Ukraine
Italy	-4 (-12)*	2 (-12)	11 (-1)
UK	-3 (-17)	-31 (-4)	13 (-8)
France	-18 (-17)	-13 (-6)	10 (-6)
Germany	-26 (-12)	-22 (-2)	8 (+0)

-40 – -31	-30 – -21	-20 – -11	-10 – -1	0 – 10	11 – 20
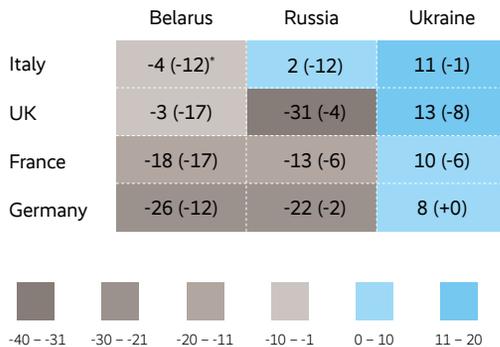
*The figures in brackets indicate how perceptions have changed since February/March 2021.

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

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msc Munich Security Index   KEKST CNC

Trouble in the Neighborhood: Belarus and Ukraine

Both Belarus and Ukraine, two former republics of the Soviet Union, play a crucial role for Moscow and its quest to reclaim and defend its special status. In both countries, majorities have clearly expressed their wish for democratic reform. When, in 2020, the Belarusian opposition, supported by huge parts of the population, peacefully protested the rigged presidential elections, the regime of Alexander Lukashenko responded with a brutal crackdown. Thousands of Belarusians now are behind bars; many were tortured. Countless nongovernmental organizations and media outlets were dissolved.[25] While Russia continued to support the regime, liberal democracies have publicly supported the opposition, refrained from accepting Lukashenko as the legitimate ruler of Belarus, and implemented sanctions against the regime. Minsk has turned into a "full-blown rogue regime"[26] that does not shy away from diverting civilian aircraft to arrest a critical journalist or exploiting migrants from the Middle East by sending them to Europe's borders – all with the open or quiet backing of Moscow.[27] Unsurprisingly, Belarus is the country whose perception has worsened the most drastically in the Munich Security Index (Figure 5.1; Figure 1.10).

By now, Lukashenko's regime is completely dependent on the Kremlin. Having tried to distance himself time and again from Putin's Ukraine policy and offer Minsk as an "honest broker," Lukashenko now appears subservient to the Kremlin, offering his support for a potential war, suggesting the deployment of Russian nuclear weapons in Belarus, or asking Putin to send troops to Belarus for joint exercises.[28]

Ukraine is even more important to the Kremlin, as the country has historically played a key role in the construction of the idea of a "big Russian nation," traditionally used by Moscow to legitimize and exercise political control in its neighborhood.[30] In July 2021, Putin, for whom Ukraine seems to be a personal issue,[31] published a 5,000-word essay in which he spelled out his own version of the history of the relationship between Russia and Ukraine and essentially denied Ukraine's identity as a state independent from Russia.[32] But even as the Russian government tries to make a distinction between the Ukrainian people and its leadership, courting the former and dismissing the latter as Western "vassals" with whom one must not negotiate,[33] Moscow's policies have alienated most of Ukraine's population. In December 2021, Kremlin spokesperson Dmitry Peskov admitted as much: "Have we lost Ukraine as a partner, ally, and so on? At this point, yes, completely."[34]

As MSC Chairman Wolfgang Ischinger notes, "[n]othing has spurred Eastern Europe's aspirations to NATO more than Russia's refusal to respect the sovereignty of its own neighbors."[35] Indeed, the Kremlin's policies have "persuaded the Ukrainian government and an increasingly large segment of the Ukrainian population that they can find security and stability only if their country is anchored in institutions such as the European Union and NATO."[36] Since 2019, the goal of becoming an EU and NATO member is part of the Ukrainian constitution.[37] Moreover, the more successful Ukraine's democracy is, the greater a challenge it poses "to Putin's autocratic, sclerotic, kleptocratic, and ever more brutal political system."[39] If Ukrainians can live in a prosperous liberal-democratic state with a vibrant civil society, why not Russians?

Now, as it seems to be "losing" Ukraine, the Russian government has "enlarged" the problem, turning its ire on the US and its European allies, who are now the only ones who can prevent Ukraine's integration into the EU and NATO. From Moscow's point of view, they have ignored key Russian security interests by promising NATO membership to Ukraine and Georgia at the Bucharest Summit in 2008 and reiterating this commitment ever since. Through this lens, classic diplomacy, even if presented in the bluntest

way possible – as with Vladimir Putin's speech at the Munich Security Conference fifteen years ago[40] – has not been able to drive home the importance of Russia's message that the West is trampling on what are seen as Russia's legitimate interests in its neighborhood, particularly in Ukraine. From this point of view, only the threat or the actual use of force have made the West listen. Although it is Russia that has violated international law by annexing Crimea, using force against Ukraine, and occupying parts of Georgia and Moldova, it presents itself as a victim. At least at home, this seems to work. As a recent Levada poll found, only four percent of respondents believe that Russia is responsible for the escalation concerning eastern Ukraine, while 50 percent believe it is the US and other NATO members and 16 percent blame Ukraine. 36 percent think a war between Russia and Ukraine is "rather likely."[41]

NATO's Support for Ukraine: Walking a Thin Line

For NATO, supporting Ukraine without making unfulfillable promises has been a major challenge. On the one hand, NATO has stuck to the compromise wording adopted at the Bucharest Summit stating that Ukraine and Georgia "will become members of NATO."[42] On the other hand, it has also continued to refrain from issuing a Membership Action Plan, which would signal the beginning of membership talks. This neither-here-nor-there decision, meant as a compromise, has unfortunately disappointed Ukraine and Georgia while also failing to placate Russia.[43]

Given the situation, few in the West have believed that Ukraine's admission into NATO is a realistic scenario in the medium-term future. There is no consensus among NATO members on whether Ukraine will fulfill all criteria for membership, not least because it is unclear whether its "inclusion can contribute to the security of the North Atlantic area."[44] Yet NATO continues to reiterate both its open-door policy and the right of every European state to choose its own security arrangements, including Georgia and Ukraine.[45] After all, this is a principle that all European states, including Russia, have repeatedly confirmed.

Since 2014, the Alliance has strengthened its partnership with Ukraine, supporting its reform agenda in the security and defense sector and efforts to increase its resilience in the face of hybrid threats. Yet it has also always been careful to underline that NATO membership is not a realistic short-term option for the country.[47] Some Western countries have bilaterally supported Ukraine with weapons and military training, while others, including Germany, have refrained from doing so, fearing this would only fuel an escalation.[48] Although the Ukrainian armed forces today are better equipped

"[Putin] wants to undermine the transatlantic unity and our resolve, because it's so much easier for the Kremlin to bully and threaten individual states than it is to negotiate with a strong and closely united transatlantic community. [...] We want a future where all nations are able to freely determine their own path without a threat of violence or coercion."[46]

Joe Biden, US President, MSC Special Edition, February 19, 2021

and trained than a few years ago and would be able to massively increase the costs of potential aggression for the Kremlin, they remain far inferior to Russia's troops.[49] Still, from Moscow's perspective, Ukraine has become "a Western aircraft carrier parked just across from Rostov Oblast in southern Russia."[50] Western support that is not nearly enough from a Ukrainian point of view is already far too much for Moscow.

Figure 5.2

Citizens' views on specific risks posed by Russia, share saying risk is high, November 2021, percent

	Russia attacking a NATO country on its western border	Russia hacking elections
India	52 (+5)*	50 (+3)
Japan	44 (+9)	40 (+6)
South Africa	44 (+4)	45 (-2)
US	41 (+6)	50 (+8)
UK	39 (+5)	45 (+2)
Brazil	36 (+2)	42 (+1)
Canada	33 (+0)	43 (+3)
France	30 (+5)	37 (+1)
Germany	29 (+1)	39 (+1)
Italy	28 (+5)	39 (+4)
China	28 (-2)	28 (+0)

21 – 30   31 – 40   41 – 50   51 – 60

*The figures in brackets indicate how the share saying the risk is high has changed since February/March 2021.

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

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Unintended Consequences

But just as the Russian government feels provoked by even small steps of support for Ukraine, Russia's policies regarding Ukraine in particular and the region as a whole have led to a hardening of positions in the West, too. Perhaps underestimating the potential for unity in Europe,[51] Moscow has succeeded in turning the mood even in EU and NATO countries usually seen as rather "Russia-friendly," such as France, Germany, or Italy. Russia is increasingly seen as threatening in these countries as well (Figure 5.2).

This is a remarkable change, considering that, when NATO's current Strategic Concept was adopted at the Lisbon Summit in 2010, NATO member states stressed that they wanted "to see a true strategic partnership between NATO and Russia."[52] Yet after 2014, NATO members felt forced to implement what Secretary General Jens Stoltenberg calls "the biggest reinforcement of our collective defense in a generation."[53] They have markedly increased their defense spending efforts, agreed on new force structures, and endorsed a NATO 2030 agenda to make the Alliance fit for the next decade. The new Strategic Concept, to be adopted at the Madrid Summit in June 2022, is expected to consolidate NATO's renewed focus on collective defense.[54] Without Russia's actions in recent years, most of these decisions would have been unthinkable.

For some member states, though, these efforts are not enough. They are anxious to secure increased NATO and particularly US support – ideally (more) boots on the ground. Within the Alliance, the Bucharest Nine, a group of member states located on the eastern flank, has called for additional steps to strengthen NATO's posture in the region.[55] For the Bucharest Nine, Russia is escalating all along the eastern flank; hybrid attacks on the Polish, Lithuanian, and Latvian borders coming from Belarus, the military build up in the region as a whole and at the Ukrainian border in particular, and the escalation in the Black Sea are all part of the same pattern. The nine nations stress their "unity on further strengthening NATO deterrence and defense" to ensure NATO's security, "including from the Baltic Sea to the Black Sea."[56] One specific proposal that has already been floated is a reinforcement of NATO's posture in the Black Sea region. Secretary General Jens Stoltenberg recently noted that NATO was regularly evaluating its force posture, while, according to press reports, NATO's Supreme Allied Commander Europe Tod D. Wolters suggested an extension of the enhanced Forward Presence mission to Bulgaria and Romania.[57] Whereas the NATO member states on the eastern flank have on occasion questioned whether NATO should stick to the limits

"We are looking forward to seeing actions taken by Germany, because Germany has a leverage on Russia, and the commitments undertaken in the joint US-German statement are very clear. [...] Nord Stream 2 is not only a Ukrainian problem; it's a European problem."[60]

Dmytro Kuleba, Ukrainian Foreign Minister, press conference at the US State Department, November 10, 2021

set by the NATO-Russia Founding Act when Russia has violated its core principles,[58] members like Germany and others in Western Europe have made the case for continued commitment.[59]

In Germany, France, and Italy, the public is also still more reluctant than the public in Canada, the United Kingdom, and the United States to oppose Russia economically and militarily (Figure 5.3). Critics fear that Russian tactics will be effective, with "continental European political and intellectual elites" suffering from "geopolitical naivety about the functioning of international affairs and simplistic pacifism oblivious of the reasons for war and peace."[61] Most notably, there is concern that Germany will try to preserve the Nord Stream 2 pipeline project, irrespective of Russian actions.[62] However, those who still argue that the pipeline is first and foremost an economic project are under increasing pressure, as critics in Germany and abroad are convinced that it should be used as leverage in the conflict with Russia.[63] Moreover, according to the compromise about the pipeline reached with the United States in July, Germany promised to take action should "Russia attempt to use energy as a weapon or commit further aggressive acts against Ukraine."[64] Due to Russia's own actions, one of the key geoeconomic projects that the Kremlin has pursued in recent years – and that successive German governments have defended – is now at risk.

Due to Russia's policies, traditionally non-aligned countries in Europe have also demonstrated an increased interest in deepening military cooperation with NATO and the US.[65] In his New Year's speech, Finland's President Sauli Niinistö, a politician known for his belief in diplomacy who recently called for "reviving the Helsinki spirit,"[66] reiterated that "Finland's room to maneuver and freedom of choice also include the possibility of military alignment and of applying for NATO membership, should we ourselves so decide."[67] Since 2014, Sweden has also upgraded its national defense efforts, taken a harder line on Russia, and deepened cooperation with NATO, while shying away from considering actual membership.[68]

With some of its member states targeted directly by Russia's proposals for a revised security order, the EU will need to play a crucial role in the ongoing debates about the European security order.[69] Moreover, it holds many tools that may be needed to deter Russia and help European nations strengthen their resilience. On the one hand, the European Commission has begun to draw up plans for additional sanctions that would, according to European Commission President Ursula von der Leyen and other leaders, go far beyond

"We are prepared. There is a whole set of economic sanctions in place, target-ing the financial and energy sectors, dual-use goods, and defense. Our response to any further aggression may take the form of a robust scaling-up and expansion of these existing sanctions. And of course, we are ready to take additional, unprecedented measures with serious consequences for Russia."[71]

Ursula von der Leyen, President of the European Commission, speech to the European Parliament in Strasbourg, December 15, 2021

Figure 5.3

Citizens' preferences for their country's response to Russia, share saying that their country should oppose Russia minus share saying that their country should cooperate with Russia, November 2021, percent

● Size of circles = size of population
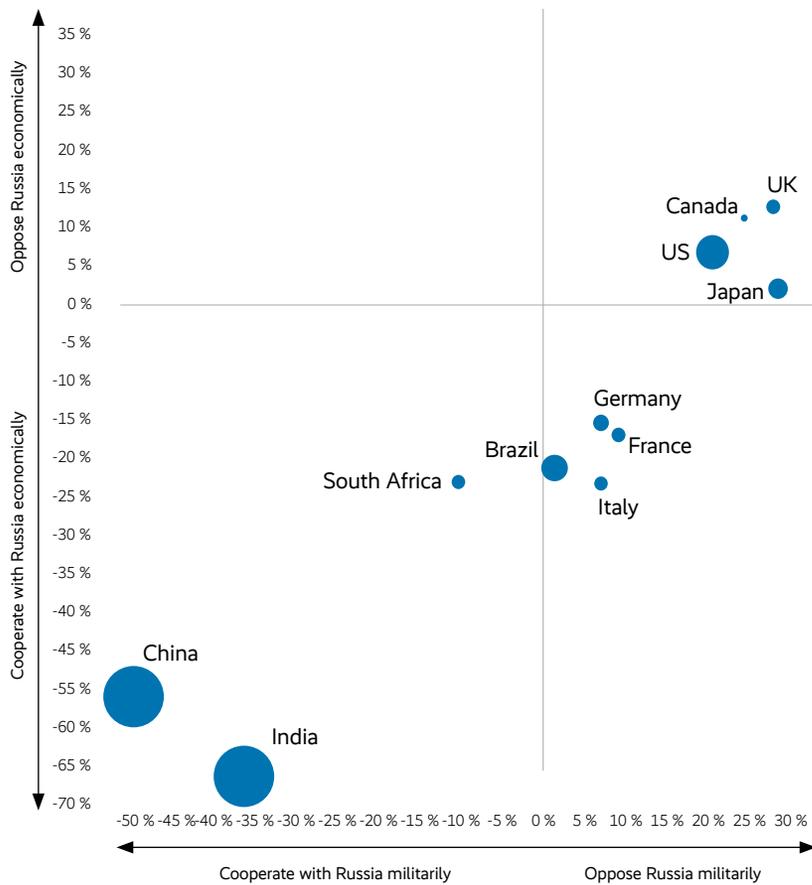
the existing sanctions, which the EU member states have repeatedly extended, to the surprise of many. On the other hand, the new Strategic Compass includes both military and civilian elements and "proposes boosting intelligence capacities and expanding the suite of tools for countering hybrid and cyberattacks as well as foreign disinformation and interference" – not least because of Russia.[70]

In summary, those NATO members traditionally concerned about Moscow's motives now see Russia as an ever-increasing threat, those who really hoped for a constructive relationship with Russia are increasingly frustrated with the Kremlin's behavior, and even countries not aligned with NATO seek closer ties with it and the US. Crucially, since Russia renewed its threats against Ukraine in late 2021, the Biden administration as well as France, Germany, and the UK have taken great care to coordinate and move in lockstep, sending the message that they are ready to "impose massive consequences and severe costs on Russia" should the Kremlin pursue further aggression against Ukraine.[72] Both NATO and the EU are preparing additional measures should Russia continue to go down the escalatory path. In other words, the Kremlin's policies seem to slowly bring about what it ostensibly fears the most: new military capabilities and strengthened cooperation among European and North American democracies.

Back to the Future on a Tested Dual Track?

But what can be done to prevent a military escalation now? Some analysts believe that the US and its European allies could do more to de-escalate and should be ready to compromise. In a much-debated article, political scientist Samuel Charap called on the US administration to use its leverage with Kyiv to push for a unilateral implementation of the Minsk II agreement to test Russia's willingness to compromise and de-escalate: "Without a willingness to push the Ukrainians to play ball on Minsk, the current policy of threatening consequences to Moscow and bolstering support for Kyiv may be insufficient to stop a war."[73] In a similar vein, a group of German analysts and former officials is also calling for a recalibration of the West's approach in order to break out of what they refer to as an "escalation spiral." Rather than stepping up sanctions and deterrence, they call for a high-level conference with the goal of a "revitalization of the European security architecture" without any preconditions, as well as for a moratorium on additional troop deployments, a revitalization of the NATO-Russia Council, and offers for economic cooperation.[74]

"We cannot accept that Russia is trying to re-establish a system where big powers like Russia have spheres of influence, where they can control or decide, what other members can do. [...] We are going to sit down, talk with Russia, but not compromise on the right of every nation in Europe to decide their own path."[75]

Jens Stoltenberg, NATO Secretary General, press conference, December 10, 2021

Others believe that such a strategy would only encourage Russia to double down on its threatening behavior.[76] From their perspective, the West needs to make clear that ultimatums and the threat of force are unacceptable. Critics like Toomas Hendrik Ilves and David Kramer argue that the West's Russia policy does not suffer from too much confrontation; to the contrary, "[r]ecent history is replete with examples of how failing to push back adequately against Putin's aggression only encourages more dangerous behavior."[77]

Unfortunately, both sides have a point in this debate: "Previous crises have repeatedly shown that if given nothing, Putin will escalate – but if given too much, he will also escalate."[78] As a consequence, NATO might do well to heed the lessons of its history, recalibrating its tested "dual-track approach," first formulated in the Harmel Report and then implemented as a response to various crises in the relationship with Russia. It combines a policy of military strength – "as much defense and deterrence as necessary" – with a clear commitment to pursuing diplomatic avenues – "as much diplomacy and dialogue as possible."[79] In essence, this thinking informs the "two-track approach" that the Biden administration has pursued for the past few weeks.[80] The exact mix of tools, negotiation formats, and proposals put forward in this framework will have to be adjusted on a continuous basis.[81]

The immediate challenge is to deter the use of force and start a diplomatic process to find a solution that is acceptable to Russia and the West without infringing on the sovereign rights of independent countries.[83] This is – to put it mildly – not an easy feat. After all, if one compares the Russian proposals and Russia's wish list to what NATO expects from Moscow, it is obvious that these two visions are, for the most part, mutually exclusive. The Russian proposals suggest a fundamental reversal of the European security order. Given the maximalist demands put forward by Russia and the overwhelming consensus in the Euro-Atlantic community to preserve the fundamental principles of the Helsinki Final Act and the Charter of Paris, it is far from clear whether Moscow is interested in any real diplomatic effort.[84] Western leaders have been clear that they do not intend to talk about the nonstarters in Russia's proposals, including the introduction of "spheres of influence" – a notion that, according to Secretary of State Antony Blinken, "should be relegated to the dustbin of history."[85] But if this is precisely what Russia wants and sees as the only acceptable outcome, there is not much room for agreement. Yet, diplomacy must try – if it still gets a chance. As this report goes to print, hopes are dwindling.

Key Points

1 Russia is fundamentally dissatisfied with the post-Cold War order and the loss of its status as a superpower dominating its neighborhood. While the West may have been content with the fragile status quo on the eastern flank, Moscow fears that Ukraine will exit its orbit and bring additional Western military capabilities closer to Russian borders.

2 In essence, the Russian government calls for the recognition of a Russian sphere of influence that would contradict a key norm of the European security order: the right of every state to choose its own security arrangement.

3 Russia's aggression against Ukraine and its policies regarding other European states have already provoked a backlash, as threat perceptions across Europe are converging and support for a more robust response is increasing. Moscow thus seems to be bringing about what it fears the most.

4 The best way forward may be a modern version of the classic "dual-track approach," combining a policy of strength with a commitment to dialogue and diplomacy. Unfortunately, the threat of imminent aggression has been mounting.

Technology

6 Supply Chains of Command

What have the Covid-19 pandemic and recent geopolitical power moves revealed about the fragility of supply chains in the high-tech sector? How will the resilience of these supply chains impact strategic competition? What are the implications of the United States, Europe, China, and others trying to secure access to high-tech goods? And what space is there for cooperation among like-minded partners?

Supply Chains of Command

Randolf Carr

The Covid-19 pandemic has laid bare the fragility of many overseas supply chains. The knock-on effects are still playing out in the form of supply shortages and shipping backlogs. Especially in the technology sector, underappreciated vulnerabilities have come into focus. The global semiconductor supply shortage shut down production lines for everything from cars to video game consoles and may not fully resolve itself until 2023.[1] The value chains of high-tech hardware and components and the raw materials needed to fabricate them, like rare earths, have choke points or countries that control an outsized share of supplies – often at geopolitical hotspots. For instance, threats toward Taiwan from mainland China focused the world's attention on one Taiwanese company, Taiwan Semiconductor Manufacturing Company (TSMC), that accounts for around 90 percent of global "made-to-order" capacity for cutting-edge microchips.[2] Then, just as the chip shortage started to ease in late 2021, automotive, electronics, and other industries were shocked by a shortfall of magnesium from China, which accounts for 87 percent of global production.[3]

Depending on such "single points of failure" and geopolitically fraught supply sources is risky, as these dependencies are increasingly leveraged for influence on the international stage. Furthermore, as the pandemic has shown, it is not only geopolitical power moves, but also natural hazards, that can interrupt tech supply chains. Microchips, electronics, communications equipment, and mining are the sectors most vulnerable to geophysical shocks like earthquakes and tsunamis, and face risks from climate change, too (Figure 6.1).[4] The realization that these vulnerabilities are problematic in an age of renewed great-power competition has spurred a renaissance of industrial policy in the United States, Europe, and other high-tech economies. However, the potential for shifting supply from foreign soil to within national borders, so-called "onshoring," has clear limits. This prompts the question of where cooperation is necessary between like-minded partners for all to become more resilient.

Strategic Circuit Breakers

Access to and control over high-tech hardware and resources is of strategic importance in several regards, including economic competitiveness and the capability for innovation, national security, and influence over norms and values. Specialized semiconductors are essential for many economies' staple industries like electronics or automotive. At the same time, cutting-edge

"China's trajectory also was supported by an under-appreciation in the West and in the United States of the importance – and the fragility – of our technological preeminence as well as by a reflexive and bipartisan allergy for many years, indeed for decades, of industrial policy of almost any stripe."[5]

Jake Sullivan, US National Security Advisor, Global Emerging Technology Summit, July 13, 2021

Figure 6.1

Projected increase in climate hazards to semiconductor manufacturing hubs in East Asia

Increase in frequency of disruptive extreme hurricanes by 2040*

● ≤1.00x ● 1.01–1.25x ● 1.26–1.75x ● 1.76–2.25x ● 2.26–3.00x ● >3.00x

Manufacturing hub share of global market (by segment), 2019, percent
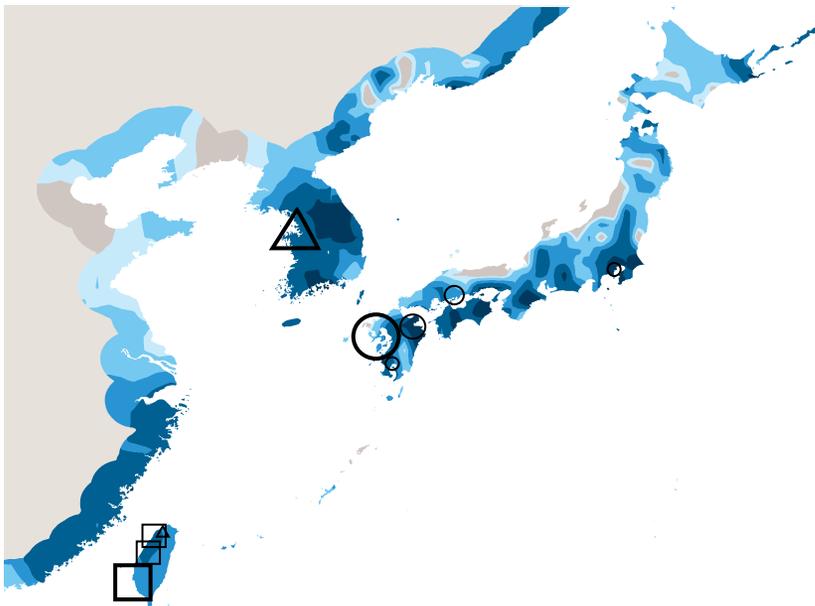
*Extreme hurricanes with a one-in-100-year severity are considered "disruptive." 1980–2000 is used as the reference period. The projection is based on the Representative Concentration Pathways 8.5 scenario, which assumes a global average temperature increase of about 2.3°C above preindustrial levels by 2050.

Data and illustration: McKinsey Global Institute

chips drive game-changing innovations in the tech economy, such as cloud computing, artificial intelligence (AI), robotics, or biotechnology.[6] In many such future-oriented fields, China is cornering the market. For instance, by 2023, it will account for 70 percent of global production of batteries for powering electric vehicles.[7] China also leads the world in deploying fifth

generation mobile broadband (5G) base stations, both domestically and abroad, and is becoming a major supplier of undersea cables.[8] This will become crucial for enabling the growth of the digital economy as internet usage and data traffic surges, especially in Asia.[9] Critically for national security, ownership and maintenance of this connectivity hardware also comes with the ability to control and access the flow of data through it. This was the main point of contention as the debate over Chinese companies' involvement in 5G rollouts around the world played out, including on the stage of the Munich Security Conference in 2020.[10] The 5G debate has also illustrated that states deciding where to source their information technology (IT) from increasingly have to take not just cost and convenience, but also suppliers' values and allegiances, into account. Supplying hardware to a country can provide an opening to influence norms for its use – for instance, in the context of internet access or surveillance.[11] Already, many experts see the global communications landscape, and thus potentially the internet, splintering along the lines of countries choosing to use either Western or Chinese equipment and standards.[12]

As international economic relations as a whole become more and more interwoven with strategic competition – popularizing terms like "geoeconomics" and "weaponized interdependence" – policymakers and industry alike are realizing that business, trade, and investment will not go on as usual.[13] Among the various arenas in which the increasing strategic competition is playing out, technology and its supply chains figure to be critical ones.

Chipping Away at Dependencies

This competition is complicated by the fact that China is not only rapidly catching up or even surpassing the US and its allies in technological capability and innovation – its tech sector is also closely interwoven with theirs.[14] On all sides, initiatives to rein in or manage these interdependencies are intensifying. In high-tech economies in the West and in East Asia, this has taken the shape of an industrial policy revival focused on onshoring production from overseas. According to a McKinsey study, up to a third of global exports of electronics, semiconductors, and communications equipment could theoretically be relocated to other countries within five years.[15]

China's push to become a "science and technology innovation superpower"[16] has relied on onshoring for decades. Made in China 2025 and related initiatives push domestic production in key sectors like chips and communications equipment. Other plans like the Digital Silk Road and China Standards 2035 promote building IT infrastructure abroad and, using the strength of China's industry, setting international rules for tech and data governance.[17] Under the moniker "dual circulation," President Xi Jinping is now doubling down on "security [… and the] ability to prevent and control risks" in tech supply chains.[18] In some areas, Beijing has been extremely successful; in others, less so. China has "quasi-monopolized" the markets for magnesium, rare earths, and other raw materials.[19] Massive investment coupled with strict domestic market protections have given Chinese telecoms a prohibitive advantage in terms of rolling out 5G domestically and in third countries.[20] With semiconductors, on the other hand, Beijing is falling well short of its ambitions.[21] China remains heavily reliant on imports – 350 billion US dollars' worth of chips in 2020 (Figure 6.2) – as well as on chip-related software, equipment, and, intellectual from abroad.[22]

"Scientific and technological self-reliance and self-improvement has become the basic capability that determines the survival and development of China, and there are many 'choke point' problems."[23]

Xi Jinping, President of the People's Republic of China, speech to senior officials of the Communist Party of China, January 11, 2021

Figure 6.2
Selected trade balances for semiconductors, 2016–2020, USD billions

Data and illustration: Mercator Institute for China Studies, based on Comtrade and Taiwan Directorate General for Customs

MERICS
Mercator Institute for China Studies

"We find ourselves in a vulnerable position with no leading-edge chips being made in America. We have to make investments now so that never happens again. [...] With export controls, we have to work with our European allies to deny China the most advanced technology, so that they can't catch up in critical areas [...]"[28]

Gina Raimondo, US Secretary of Commerce, CNBC, September 28, 2021

Transatlantic Rewiring

In large part, the stumbling blocks China has encountered are no coincidence. The United States has taken "defensive" measures: export controls, tech transfer restrictions, and other ways of hampering Chinese firms.[24] Its Clean Network campaign succeeded in dissuading many allied countries from purchasing Chinese 5G, and export controls cut off some Chinese firms not only from US chip technology but also from Taiwan, Europe, and others. While these measures have had significant impact, they also give China incentive to speed up its march toward "technology independence."[25] So, under successive administrations, the US has also been set on ensuring its "technological leadership" – including through numerous strategy documents like the National Strategy for Critical and Emerging Technologies and the Biden administration's supply chain review, as well as legislative forays into industrial policy.[26] However, funding – such as the 52 billion US dollars for the semiconductor sector under the CHIPS for America Act – and coordinated implementation are still lacking, with some urging a less "piecemeal" strategy.[27]

Europe, already eyeing "technological sovereignty" before the pandemic-induced shocks, has refocused its efforts. A European Commission document lists 137 strategically important goods for which Europe is highly dependent on imports, including tech products and raw materials (Figure 6.3).[29] The EU lacks some "defensive" capabilities to confront competitors – for instance, an equivalent to the US Bureau of Industry and Security's "entity list" for export restrictions.[30] Like the US, however, the EU has produced a flurry of documents, targets, and putative measures in the past two years alone: an updated industrial strategy, the European Digital Compass, "industrial alliances," and more. In addition to 145 billion euros earmarked for digital tech in its Covid-19 recovery fund,[31] the Commission has also proposed a dedicated European Chips Act to "preserve security of supply."[32] The EU's initiatives have been viewed as a positive strategic move overall; still, industry experts warn it is setting itself up for disappointment by aiming to secure a 20-percent share of the market along with manufacturing capacity for cutting-edge chips.[33]

In effect, the approach to semiconductors taken by Europe and the US, as well as by Japan and others, amounts to a bidding war for international chip giants like TSMC, Samsung, or Intel to build factories worth tens of billions of dollars on their territory to onshore supply.[34] Industry estimates show that replacing the globalized semiconductor value chain with self-sufficient national or regional value chains could cost around one trillion US dollars

Figure 6.3

Share of EU imports of critical technology goods and resources from third countries, 2019, percent

China (incl. Taiwan)	Vietnam
70	16

Rest of the world: 4
Japan: 3
UK: 2
Russia: 1
US: 1
South Korea: 2
Hong Kong: 2
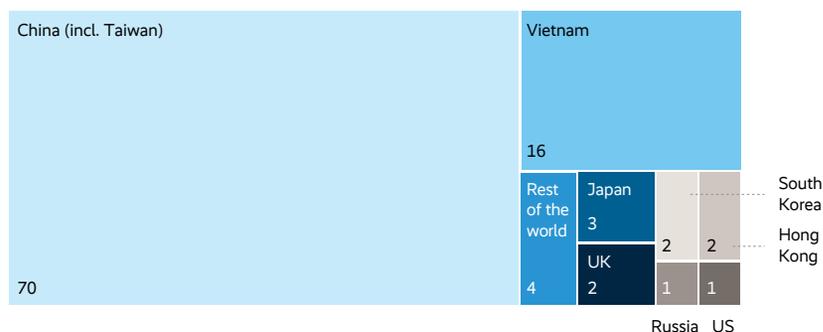
Data and illustration: Munich Security Conference, based on European Commission and BACI Database

upfront and another 100 billion per year due to inefficiencies.[35] Indeed, given the complex division of labor in tech value chains and the potential for friction in relations between allies, such approaches may end up being counterproductive.

Mutually Assured Production?

Fortunately, coordination among like-minded partners on the resilience of tech supply chains is growing. The newly supercharged activities in the "Quad" format between the United States, Japan, India, and Australia have taken on "critical and emerging technologies" centered on chips and rare earths.[36] The EU-US Trade and Technology Council (TTC), inaugurated in the fall of 2021, may catalyze transatlantic coordination on technology policy. Although the TTC's working groups run the gamut from clean tech to AI ethics, its clear short-term focus lies in semiconductors and export control coordination. At its first meeting, the TTC recognized the need to avoid a "subsidy race" for chip factories between the US and Europe.[37]

In the best case, the "Quad" and TTC are a basis for "complementary democratic tech alliances" in the transatlantic and Indo-Pacific arenas.[39] But the level of ambition necessary to make such coordination truly impactful must not be underestimated, especially in the face of a China whose state-driven efforts are unmatched by any of the high-tech democracies.[40] "Talk is cheap but unwinding digital entanglement with

"Indeed, self-sufficiency is an illusion. When you think about the scale of what is needed, it is clear that no country and no company can do it alone. [...] That's why the aim should be diversification among like-minded partners, to build resilient supply chains, and avoid single points of failure."[38]

Margrethe Vestager, Executive Vice President of the European Commission for A Europe Fit for the Digital Age, European Commission, November 18, 2021

China is not," and like-minded partners will have to work together to mitigate the costs.[41] Therefore, the most promising approach, in the spirit of dividing labor and avoiding choke points, is to move beyond the goal of onshoring production toward what the US has termed "ally and friend-shoring."[42] Diversifying supply chains among trusted, like-minded partners would enable, in the European Commission's words, an "international supply chain emergency instrument" – a pledge to keep crucial inputs flowing, for instance, during the next semiconductor crunch.[43] More ambitious yet would be the formation of a chip manufacturing "consortium" using US and European semiconductor funds to construct a distributed end-to-end value chain within the transatlantic space.[44]

For semiconductors and other critical technology goods and resources, "working out who in the supply chain does what" will require a monumental degree of policy coordination.[45] But the current supply chain crisis is an ideal incentive to rethink resilience and "build back better." Ultimately, success on these issues may lay the groundwork for cooperation between democracies on broader technology governance that has so far eluded them.

Key Points

1 Technology supply chains are characterized by numerous choke points and high degrees of specialization in individual countries.

2 Due to their strategic importance – for national economies, security, and norm-setting – technology supply chains are at ever greater risk of interference.

3 High-tech economies – the US, China, Europe, and others – are taking advantage of these vulnerabilities and guarding against them by "onshoring" production.

4 Through cooperation among like-minded partners, supply chain resilience can be strengthened more effectively and at a lower cost.

Global Inequality

⑦ Gap Years

Where does the international community stand in its efforts to reduce global inequality? To what extent do global security challenges like pandemics and climate change amplify global disparities? How do persistent inequalities affect the ability of governments and the international community to tackle global threats? And what needs to be done to reduce global divisions between and within states?

Gap Years

Sophie Eisentraut

Global inequality keeps producing dire headlines. Leaked documents – the Pandora Papers – have once again unmasked the vast extent of offshore banking and tax evasion by the world's wealthiest. Racial injustice persists, as documented by recurring incidents of police brutality against People of Color. And the division between those with access to Covid-19 vaccines and those who remain at the mercy of the coronavirus pandemic is reportedly growing. With many countries across the globe having experienced social unrest associated with rising inequality,[1] the pressure to rectify these disparities seems to be growing everywhere. So is political awareness of the destabilizing potential inherent in the global rich becoming richer, while low-income countries see extreme poverty increase and industrialized countries find their middle classes squeezed.[2] Even the world's most powerful competitors, the United States and China, appear united in their concern about rising domestic inequality.[3]

The Covid-19 pandemic has brutally exposed cleavages that exist within and across states. Most importantly, it has highlighted that the virus and its effects have disproportionately harmed the poor and people from other marginalized groups across the globe. The disparities provoked by Covid-19 have not only compounded human insecurity; they have also proven to be a global security threat. Unless the capacity to cope with the pandemic is distributed more equally, the virus will never be defeated. Instead, new mutations will appear in some parts of the world and spoil what others have achieved in virus control. In that regard, Covid-19 has alerted the world that many of the grave threats humanity faces today – be they pandemics or climate impacts – are inseparably tied to global divides. These security threats not only deepen existing disparities; they will also defy successful containment if current levels of inequality persist.

Over the last few decades, significant progress has been made in reducing global inequality. Since the 1990s, income gaps have narrowed both among the global population and between countries (Figure 7.1).[4] Yet these improvements are mostly the result of robust economic growth in China, India, and a few other Asian economies.[5] Moreover, disparities between countries still remain huge. North Americans earn 16 times more than people who live in sub-Saharan Africa.[6] At the same time, inequality has been growing within countries – particularly in developed economies.[7] In

Figure 7.1

Global income inequality, 1990–2019, Gini coefficient

● Inequality among the world population
● Inequality among countries
● Inequality within countries
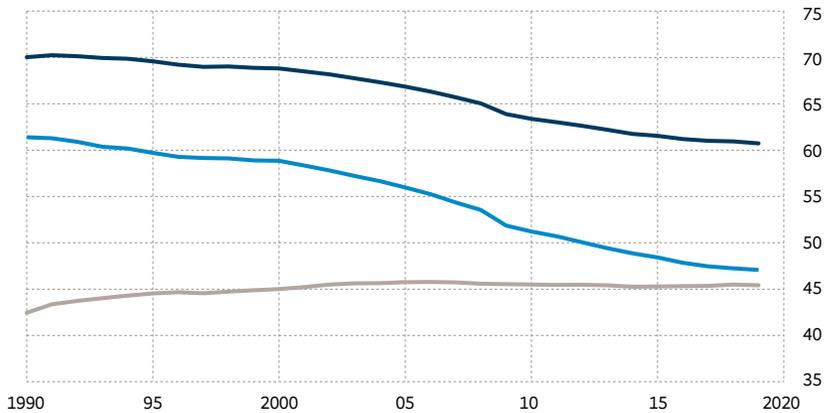
Data: World Income Inequality Database. Illustration: Munich Security Conference

2019, the OECD reported that income inequality in the OECD world was "at its highest level for the past half-century."[8] In many countries, the United Nations finds, "income and wealth are increasingly concentrated at the top" (Figure 7.2).[9] Furthermore, wealth and income gaps are complemented by divides associated with gender, ethnicity, or sexual orientation, among others. Covid-19, experts agree, will aggravate global disparities. According to first estimates, inequality between nations, which would have decreased by 2.6 percent without the pandemic, is now projected to grow by 1.2 percent.[10]

Destitution Breeds Destruction

If schisms grow, so does human suffering. But burgeoning global disparities are problematic for other reasons as well. They have the potential to destabilize societies, threaten peace and stability between countries, and undermine global resilience in the face of present and future threats. Against the backdrop of the Covid-19 pandemic, Kristalina Georgieva, Managing Director of the International Monetary Fund (IMF), warned of the "economic and social upheaval" that rising inequality would likely provoke and which could "be

Figure 7.2

Share of national wealth owned by a country's wealthiest one percent, 2021, percent

≤10.9   11.0–13.9   14.0–16.9   17.0–19.9   ≥20.0   Missing value
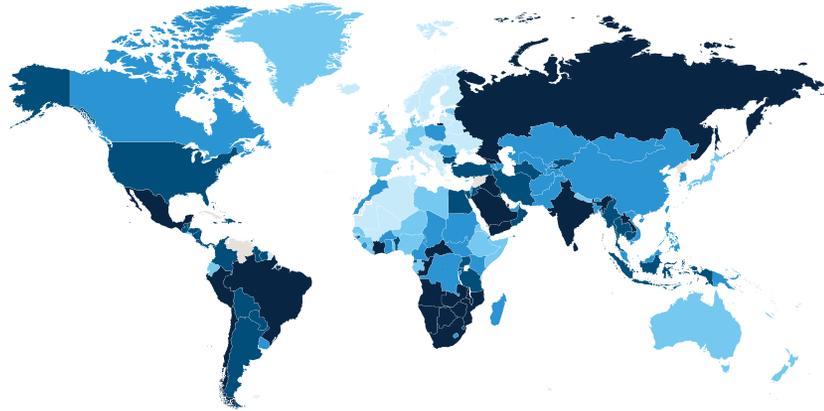
Data and illustration: World Inequality Database

felt for decades to come."[11] High levels of inequality fuel tensions between the haves and the have-nots, erode social cohesion, and, as a result, may even spark violence and conflict.[12] Inequality also undermines democracy and propels political dysfunction by corroding trust in political institutions.[13] Clearly, advanced economies are not immune to the destabilizing effects either.[14]

If hardship grows within countries, the effects will be felt across borders. In fact, post-World War II efforts to ensure a uniform global economic recovery – one that also included the defeated powers – were based on the experience of the interwar period. Within just a few years, the disparities and deprivation created by World War I had fueled yet another clash between nations.[15] While the coronavirus pandemic has provoked levels of inequality and misery that some compare to the interwar period, there are currently no comparable efforts to reduce the kind of divides that had previously enabled war.[16]

Even if it does not spark domestic or interstate conflict, inequality undermines countries' resilience against other security threats – and this is

"[T]he risk of tensions and instability will continue to rise, magnified by inequalities in the global recovery."[17]

Rosemary DiCarlo, UN Under-Secretary-General for Political and Peacebuilding Affairs, briefing to the UN Security Council, January 27, 2021

highly unsustainable.[18] Governments confronted with internal hardship will hardly be able to contain pandemics or mitigate the impacts of a climate crisis.[19] Furthermore, if widening inequality strengthens right-wing populist narratives, international cooperation will also suffer, undermining the tools needed in the fight against shared global threats.[20] Last but not least, many global problems simply cannot be solved if global disparities persist. No country will be safe from the coronavirus pandemic if the virus rages on in other parts of the world. The same is true for global warming: it cannot be effectively reduced if less developed countries lack the resources to embark on low-carbon pathways.

"We risk facing the greatest rise in inequality since records began."[25]

Gabriela Bucher, Executive Director of Oxfam International, The Davos Agenda, January 25, 2021

The Inequality Pandemic

UN Secretary-General António Guterres has rightly spoken of an "inequality pandemic."[21] Covid-19 and its secondary effects are about to undo years of progress on improving equal opportunity through sustainable development. The world is already projected to have experienced the first rise in global poverty since 1990.[22] In 2020, the number of people affected by moderate or severe food insecurity increased by almost 320 million.[23] Within countries, vulnerable communities have been hit particularly hard (Figure 7.3). Between countries, the disruptive effects also differ widely. In countries and regions already afflicted by low development, fragility, and conflict, the fallout of the "polypandemic" threatens to be much more severe.[24]

Figure 7.3

Likelihood of dying from Covid-19 per 100,000 people by socio-economic vulnerability type, United States, 2020

● General population   ● Vulnerable people

Severe housing problems	Unemployment	Incarceration	Poverty	Food insecurity	Neighborhood stress
1x / 4.5x	2.4x	2.1x	1.4x	1.4x	1.4x
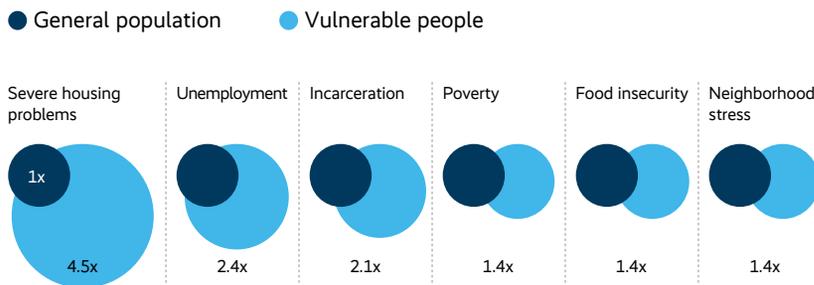
Data and illustration: McKinsey & Company

"Vaccine equity is not just the right thing to do, it's also the smart thing to do."[39]

Tedros Adhanom Ghebreyesus, WHO Director-General, MSC Special Edition, February 19, 2021

With the ability to recover differing widely, disparities are bound to grow further. For global billionaires, the first year of the pandemic brought "the steepest increase" on record in their share of global wealth.[26] In contrast, the world's poorest people might have to wait for over a decade to recover from the pandemic's socio-economic shock.[27] Meanwhile, the IMF predicts that poor and rich countries will drift further apart.[28] Key reasons for this two-track recovery are vast differences in governments' abilities to stimulate a return to growth, and unequal vaccine access (Figure 7.4).[29] According to the most recent Goalkeepers Report from the Bill & Melinda Gates Foundation, in the first half of 2021, the entire continent of Africa administered the same number of vaccines as the state of California.[30] As a result, only six percent of African people were fully vaccinated by November 2021.[31] As governments of vaccine-producing countries have shared far too few vaccines,[32] poor countries' lack of vaccine manufacturing capacities has often proven lethal.[33] In Africa, dependence on external supply is particularly pronounced, as less than one percent of all vaccine doses administered are produced on the continent.[34]

Figure 7.4

Share of people who received at least one dose of the Covid-19 vaccine, January 2022, percent
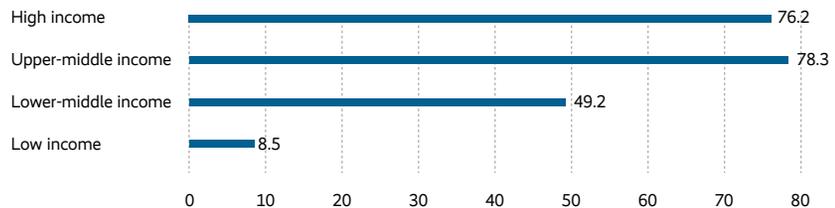
Data: Our World in Data. Illustration: Munich Security Conference

These inequalities amplify human suffering and, by exacerbating grievances, fuel the root causes of violent conflict. With hardship mounting, extremists and other violent nonstate actors find ideal conditions for radicalization and recruitment.[35] Moreover, if some countries fail to recover from the Covid-19 crisis, this hamstrings other nations' resilience to the coronavirus threat. In less vaccinated places, the risk of new strains emerging is four to six times larger.[36] The Omicron variant has confirmed the warning words of the Director-General of the World Health Organization (WHO), Tedros Adhanom

Ghebreyesus: "the more variants that emerge, the more likely it is that they will evade vaccines."[37] If the result of mutations is a much more contagious and deadly variant, rich countries' efforts to control Covid-19 could quickly be set back to square one. Moreover, newly discovered mutations immediately shake global financial markets, and a global economic downturn and continuing supply chain crises hamstring every country's economic recovery.[38] While advanced economies regularly acknowledge the gravity of these risks, their actions in support of poorer countries' recovery are largely inconsistent with this talk. In fact, some countries still seem to believe that they can contain the pandemic domestically, even if other countries have not yet received vaccines (Figure 7.5).

Figure 7.5

Citizens' views on the possibility of containing the coronavirus domestically, even as other countries still lack vaccines, November 2021, percent
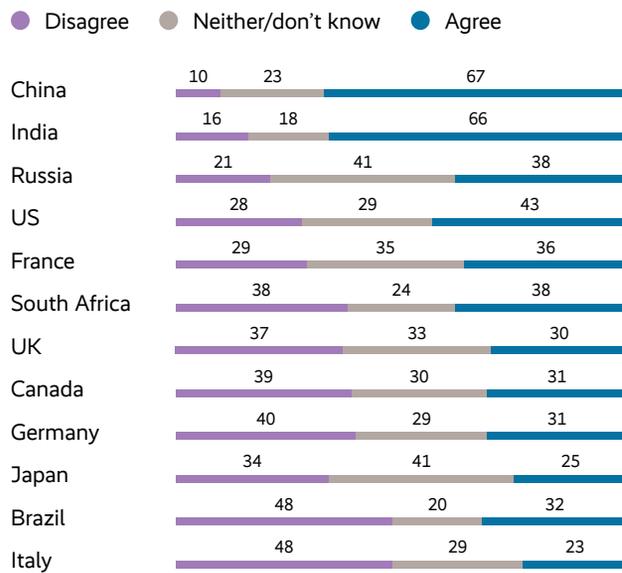
Do you agree or disagree that it is possible to contain Covid-19 in your country without the whole world getting vaccines?

- Disagree
- Neither/don't know
- Agree

	Disagree	Neither/don't know	Agree
China	10	23	67
India	16	18	66
Russia	21	41	38
US	28	29	43
France	29	35	36
South Africa	38	24	38
UK	37	33	30
Canada	39	30	31
Germany	40	29	31
Japan	34	41	25
Brazil	48	20	32
Italy	48	29	23

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

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KEKST CNC

"Vaccine inequity kills. […] We have the tools to end this pandemic, but they will only succeed in doing so if every community in every country has access to them. […] The time for warm words is over, the deadline to act is now."[40]

Carl Bildt, WHO Special Envoy for the Access to Covid-19 Tools Accelerator, October 28, 2021

There is no shortage of sensible suggestions for ensuring a more even recovery. On the economic front, this includes meaningful debt relief for the world's poorest countries and efforts to reduce the chasm between what rich countries spend on domestic stimulus programs and the "grossly inadequate"[41] amounts they dedicate to international assistance. On the vaccine front, a more even recovery would require a vaccine-sharing scheme that is "based on global public health needs."[42] Within countries and globally, the world community would have to move from administering mass vaccinations to the "speedy, targeted deployment" of vaccines to places with high infection rates.[43] Yet the most important initiative for realizing a globally efficient and fair system for allocating vaccines, COVAX, was repeatedly forced to downgrade its delivery targets.[44] To re-empower COVAX and ensure vaccine access for the world's most vulnerable populations, wealthy states have to significantly increase their vaccine donations – including by accelerating and expanding their own vaccine manufacturing. They also need to assist poor countries in scaling up their production capacities.[45] This will require quick progress on difficult questions surrounding vaccine technology transfer and the transfer of patented knowledge to manufacturers in developing states.[46]

Hazards of an Uneven Energy Transition

The climate crisis is another global threat with highly disparate effects. And one that cannot be contained at the present level of disparities. While wealthier economies will probably experience larger economic losses from weather extremes,[47] lower-income countries are more likely to be exposed to certain climate hazards.[48] At the same time, poor countries often lack the resources needed to adapt to the threat of a changing climate.[49] Meanwhile, it is the world's wealthiest countries that produce the lion's share of global greenhouse gas emissions.[50] Incomes and consumption emissions are strongly correlated (Figure 7.6). In 2015, the top one percent of income earners were responsible for almost double the share of global emissions than the bottom 50 percent.[51]

The energy transition may further increase global disparities if it continues its current uneven pattern. Poor countries not only lack the capital, knowledge, and technology to pursue decarbonization and leapfrog to renewable energy; they might also miss out on the competitive advantage that comes with green energy.[52] As argued by UN Under-Secretary-General for Humanitarian Affairs, Mark Lowcock, if climate change is allowed to reinforce global inequality, the consequences will be highly "unpleasant," likely including "increasing instability, violence, and displacement."[53]

Figure 7.6

Per capita consumption emissions of global income groups, 1990 and 2030, tonnes of CO_2

● 1990 ● 2030

1.5°C-compatible global per capita goal in 2030
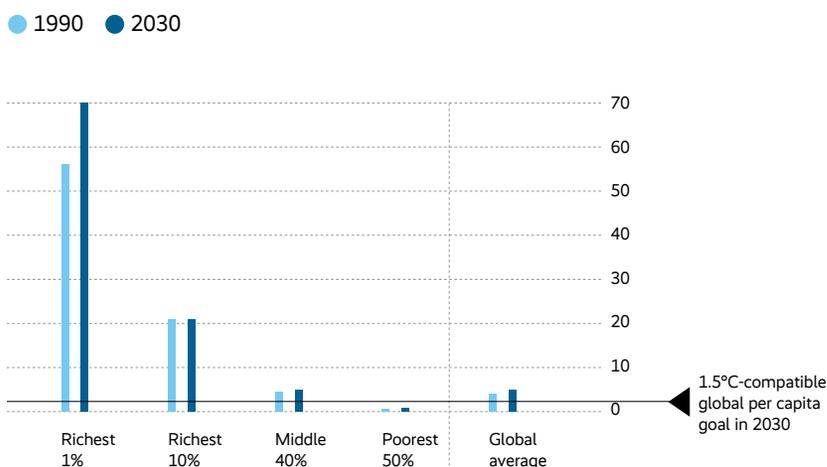
Data and illustration: Institute for European Environmental Policy; Oxfam

An uneven energy transition is also a massive liability for the global fight against climate change. While less developed countries' contributions to global warming may still pale compared to those of advanced economies, by 2040, non-OECD countries could account for 70 percent of global energy demand.[54] Most increases in emissions already come from the developing world.[55] As Uganda's President Yoweri Museveni recently argued, with Africa's population projected to double by 2050, the continent's energy consumption will then "likely surpass that of the European Union."[56]

Investments in an even energy transition are thus investments in global climate resilience. In this regard, providing developing states with climate finance and access to green technology is vital. Still, recent figures suggest that advanced economies will fall 20 billion US dollars short of their pledge to mobilize 100 billion US dollars per year in support of developing countries' climate goals by 2020 – an amount that many consider highly insufficient to begin with.[58] More ambition is needed, including on ensuring that climate finance actually helps reduce emissions.[59] Given that technological innovation has been more effective in alleviating poverty than development aid,[60] rich countries also need to do more to provide developing countries with low-

"My continent's energy choices will dictate much of the climate's future."[57]

Yoweri Museveni, President of the Republic of Uganda, Wall Street Journal, October 24, 2021

"Concerted, well-directed policy actions at the multilateral and national levels can make the difference between a future where all economies experience durable recoveries or one where divergences intensify, the poor get poorer, and social unrest and geopolitical tensions grow."[62]

Gita Gopinath, Chief Economist of the IMF, IMFBlog, July 27, 2021

carbon technology and infrastructure. Moreover, they have to ensure that the technology transfer is accompanied by the associated skills and knowledge.[61]

Renewing Social Contracts

The need to renew social contracts, ensure inclusive and sustainable growth, and provide equal opportunity for all is evident in many nations and palpable between the world's states. And there is already a framework to pursue this type of aspiration: the UN Sustainable Development Goals (SDGs). The fact that the international community is "tremendously off track"[63] to reach its development targets by 2030 is regrettable and dangerous. By emphasizing governments' domestic responsibilities – including the importance of good governance[64] – as well as the need to practice global solidarity,[65] the SDG framework is just as useful for renewing domestic social contracts as it is for a global economic transformation toward sustainable and inclusive global growth. Recent crises have shown that one cannot succeed without the other. The fate of a rich country's middle class "cannot be walled off" from the destiny of populations elsewhere in the world.[66] Neither can advanced economies promote inclusive global growth or effectively assist others in the face of international threats if they fail to address economic struggles at home. The rifts and divides that keep making the headlines are inseparably linked. Unless policymakers move from simply bemoaning these headlines to courageously attempting to reduce divides, dire news is here to stay.

Key Points

1 Income gaps between countries and among the world population have significantly decreased over the last few decades. However, inequality has been growing again within countries, even before the onset of the Covid-19 pandemic.

2 Disparities increase human suffering and have the potential to destabilize societies and threaten peace and security. They also undermine global resilience in the face of present and future threats.

3 Global security threats such as the Covid-19 pandemic and climate change exacerbate inequalities. At the same time, neither of these threats can be contained at the present level of disparities. As long as the virus rages on in other parts of the world, no country will be safe from the pandemic. And, if less developed countries lack the resources to embark on low-carbon pathways, global warming cannot be effectively limited.

4 It is time to work on two deeply intertwined aims: renewing domestic social contracts and initiating a global economic transformation toward sustainable and inclusive global growth. Getting back on track to reach the UN Sustainable Development Goals would be the first important step.

Food for Thought

Food for Thought

Books
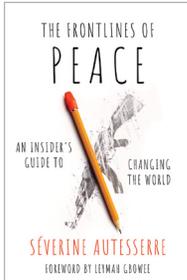
Séverine Autesserre, The Frontlines of Peace: An Insider's Guide to Changing the World
New York: Oxford University Press, 2021.

Based on many years of experience in the field, Autesserre shares her expert view on the goals and flaws of peacebuilding. She challenges common understandings of peace and conflict resolution and offers a hopeful perspective on what is needed to confront violence and build peace. Her well-examined case studies show the key roles of individuals and organizations in ending conflicts.
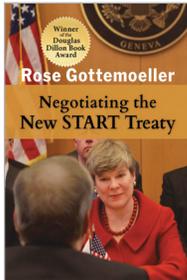
Rose Gottemoeller, Negotiating the New START Treaty
New York: Cambria Press, 2021.

Gottemoeller shares her extensive firsthand experience in creating US policy on arms control by giving fascinating insights into the negotiations of the New START Treaty between the US and Russia in 2009 and 2010. By laying out the challenges she experienced, her analysis provides important guidance for future negotiators, giving details on treaty writing, the importance of leadership, and how to deal with difficult negotiating partners.
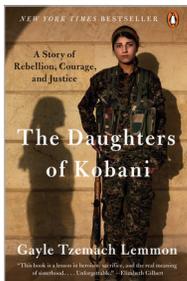
Gayle Tzemach Lemmon, The Daughters of Kobani: A Story of Rebellion, Courage, and Justice
London: Penguin Press, 2021.

Lemmon's book brings a fascinating side of the civil war in Syria to light: she tells the story of an all-female Kurdish militia in northern Syria who took on ISIS and succeeded in driving them out of the region. The book highlights women's power and courage, their ability to fight and succeed in leadership positions, and the need to continue to work toward gender equality.
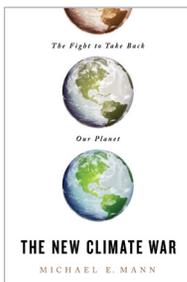
Michael E. Mann, The New Climate War: The Fight to Take Back Our Planet
New York: Public Affairs, 2021.

Mann, a renowned climate scientist, traces the tactics of those seeking to slow down climate action, including denial, disinformation, deflection, and division. He outlines how these methods must be countered to force governments and corporations to act as decisively as needed to enable progress in the fight against global warming. According to Mann, it is the lack of political will that prevents further steps from being taken.
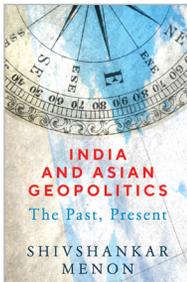
Shivshankar Menon, India and Asian Geopolitics: The Past, Present
Washington, DC: Brookings Institution Press, 2021.
India is often perceived as a counterweight to China. Menon makes a compelling case as to why India will play an increasingly relevant role in Asia and beyond. He analyzes how India has successfully navigated its geopolitical environment, including the rise of China, and how this will impact India's foreign policy and responses to domestic challenges, such as illiberal tendencies and the need to manage diversity.
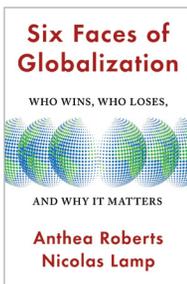
Anthea Roberts and Nicolas Lamp, Six Faces of Globalization: Who Wins, Who Loses, and Why It Matters
Cambridge: Harvard University Press, 2021.
The authors offer a holistic and differentiated analysis of economic globalization. They also lay out six competing Western narratives about who the winners and losers of globalization are and how such narratives inform public belief systems and drive policies. This book helps readers engage in constructive debates on how to shape globalization going forward.
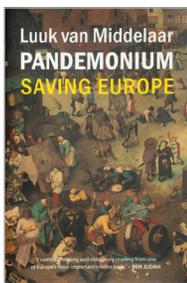
Luuk Van Middelaar, Pandemonium: Saving Europe
Newcastle upon Tyne: Agenda Publishing, 2021.
Van Middelaar analyzes the Covid-19 pandemic as the most recent test of the European Union's resilience. The author argues that the EU almost seemed irrelevant in the initial chaos following the virus outbreak as its member states were closing their borders and hoarding supplies. However, the EU demonstrated its ability to act by bringing its member states together to coordinate responses to the pandemic.
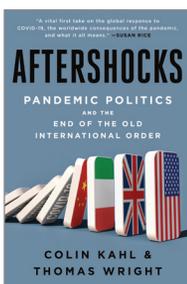
Thomas Wright and Colin Kahl, Aftershocks: Pandemic Politics and the End of the Old International Order
New York: St. Martin's Press, 2021.
This book analyzes the impact of the Covid-19 pandemic on international cooperation. It reveals how the pandemic broke out against the backdrop of several worrying developments, such as backsliding of democracy in many parts of the world. The authors show how rising nationalism and great power competition has hindered effective joint crisis responses.

Reports

Ian Anthony and Fei Su, "A Strategic Triangle in the Arctic? Implications of China-Russia-United States Power Dynamics for Regional Security"

Stockholm: SIPRI, March 2021, https://perma.cc/W4GQ-YVRC.

Arctic activities of major powers like China, Russia, and the US are increasingly affecting security dynamics in the region. This report examines the impact geopolitical tensions have on nonmilitary activities in the Arctic, such as shipping and transportation, and the risks of unwanted military escalation in the region.

Bill & Melinda Gates Foundation, "Goalkeepers Report 2021: Innovation and Inequity"

Seattle: Bill & Melinda Gates Foundation, September 2021, https://perma.cc/697M-4WSL.

The 2021 Goalkeepers Report offers an insightful perspective on the first impacts of the Covid-19 pandemic on the progress made toward reaching the UN Sustainable Developments Goals (SDGs). The pandemic made prevailing inequalities even more visible. However, the findings also suggest that existing measures to achieve the SDGs have strengthend societies' resilience.
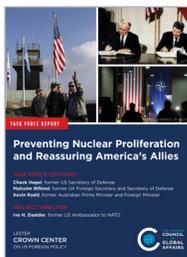
Ivo H. Daalder et al., "Preventing Nuclear Proliferation and Reassuring America's Allies"

Chicago: The Chicago Council on Global Affairs, February 2021, https://perma.cc/J66P-FTFY.

Given the rapidly changing security environment, this task-force report argues that the credibility of the US nuclear security guarantee must be restored and that allies must work together closely to achieve this. The experts put forward several recommendations on how the US can rebuild confidence in its leadership and how the transatlantic defense partnership can be rebalanced.
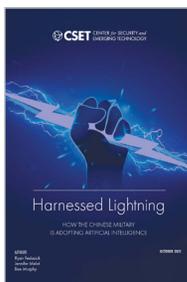
Ryan Fedasiuk, Jennifer Melot, and Ben Murphy, "Harnessed Lightning: How the Chinese Military Is Adopting Artificial Intelligence"

Washington, DC: Center for Security and Emerging Technology, October 2021, https://perma.cc/TFR4-TVBV.

This report analyzes equipment contracts of the Chinese People's Liberation Army (PLA) related to artificial intelligence and studies them in the context of China's great power competition with the US. The findings suggest that Chinese leaders seem to be preparing for "intelligentized" warfare and aiming to turn the PLA into a force that is able to disrupt US military information systems.
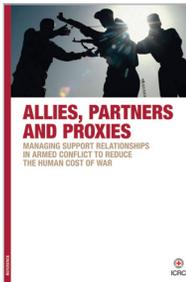
ICRC, "Allies, Partners and Proxies: Managing Support Relationships in Armed Conflict to Reduce the Human Cost of War"
Geneva: International Committee of the Red Cross, March 2021,
https://perma.cc/KTD6-J44V.
Among other factors, the increasing number of parties involved and support relationships that characterize armed conflict have altered global conflict dynamics. Support relationships increase conflict actors' capacities to engage in armed conflict. The report puts forward measures to turn these relationships into a force of good, to help protect civilians and reduce suffering.

Seth G. Jones, Rachel Ellehus, and Colin Wall, "Europe's High-End Military Challenges: The Future of European Capabilities and Missions"
Washington, DC: CSIS, November 2021, https://perma.cc/NU3X-Z8QM.
This CSIS report asks what military capabilities European allies might possess and which military missions they will be able to perform by 2030. The authors argue that major European powers will likely be able to conduct most types of missions at the lower end of the conflict continuum without significant US support but will remain dependent on the US for some missions, particularly those in the Indo-Pacific.
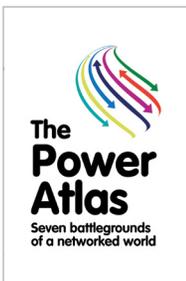
Mark Leonard (ed.), "The Power Atlas: Seven Battlegrounds of a Networked World"
Berlin: ECFR, December 2021, https://perma.cc/9GCG-PK5K.
This report conceives of power as the control over flows of people, goods, money, and data and the connections and dependencies they create. Seven key terrains of power are analyzed: economics, technology, climate, people, military, health, and culture. The authors explain what makes each terrain a battleground of power.

Philipp Rotmann, Melissa Li, and Sofie Lilli Stoffel, "Follow the Money: Investing in Crisis Prevention"
Berlin: GPPi and PeaceLab, October 2021, https://perma.cc/33T7-LXHY.
This report finds that despite states' commitments, made at the UN, to increase efforts on crisis prevention, there was no substantial increase in related investments. By analyzing several crises where early warning signs were publicly available a year before the crises erupted, the authors illustrate how the four top crisis prevention donors – Germany, the US, the UK, and the EU – often did not act on these signs or made insufficient investments for avoiding escalation.

Notes

Please note that quotations originally in British English have been adapted to American English.

Endnotes

1 Introduction: Turning the Tide – Unlearning Helplessness

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100. For the past two years, the MSC has tried to further a new transatlantic agenda and deal with various items on what we called the transatlantic to-do list – from big strategic questions such as working toward a common approach for dealing with China to specific issues such as trust-building in the digital sphere, digital sovereignty, or regional challenges that would benefit from a joint transatlantic approach. See Wolfgang Ischinger and Joseph S. Nye, "Mind the Gap: Priorities for Transatlantic China Policy Policy: Report of the Distinguished Reflection Group on Transatlantic China," Munich/Berlin/Washington, DC: Munich Security Conference, Mercator Institute for China Studies, and Aspen Strategy Group, July 2021, https://doi.org/10.47342/GXWK1490; Simon Pfeiffer and Randolf Carr, "Error 404 – Trust Not Found: A European Survey on Digital (Dis)trust," Munich: Munich Security Conference, Munich Security Brief 2, March 2021, https://doi.org/10.47342/REFQ1817; Simon Pfeiffer and Randolf Carr, "Update Required: European Digital Sovereignty and the Transatlantic Partnership," Munich: Munich Security Conference, Munich Security Brief 3, July 2021, https://doi.org/10.47342/TBAA1644; Luca Miehe, "Horn of Dilemmas: Toward a Transatlantic To-Do List for the Horn of Africa," Munich: Munich Security Conference, Munich Security Brief 4, December 2021, https://doi.org/10.47342/XXEB4946.

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2 Afghanistan: Losing Heart

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Bucharest: Bucharest Nine Defence Ministers, November 26, 2021, https://www.gov.pl/attachment/96810820-17ea-42b2-97eb-70a4266aa97a. See also President of Romania, "Joint Declaration of the Heads of State Bucharest 9 Meeting," Bucharest: President of Romania, May 10, 2021, https://perma.cc/S4PQ-APGL.

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

1 Introduction: Turning the Tide – Unlearning Helplessness

1.1 Citizens' perceptions of helplessness in the face of global events, November 2021, 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? I feel helpless in the face of global events." 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.

1.2 Citizens' views on their country's control over global events, November 2021, 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? My country has no control over global events." 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.

1.3 Citizens' perceptions of pandemic diseases, share saying they feel "in control" minus share saying they feel "helpless," November 2021, percent
Data and illustration provided to the Munich Security Conference by Kekst CNC.
In answer to the question "How in control do you feel these days in the face of the following? Pandemic diseases." Respondents were given the following options: "very in control," "somewhat in control," "neither in control nor helpless," "somewhat helpless," and "very helpless." Figures shown are the net of the total percentage for "in control" minus the total percentage for "helpless."

1.4 Citizens' trust in other countries' climate commitments, share saying other countries cannot be trusted to meet their climate change obligations, February/March and November 2021, percent
Illustration by the Munich Security Conference based on data provided by Kekst CNC.
In answer to the question "Do you agree or disagree with the following statements about your country and climate change? Other countries cannot be trusted to meet their climate change obligations." Respondents were given the following options: "strongly agree," "slightly agree," "neither agree nor disagree," "slightly disagree," "strongly disagree," and "don't know." Figures shown here combine the net responses agreeing and disagreeing, with the gray area representing the rest. Fieldwork for the previous Munich Security Index, published in the Munich Security Report 2021 and used as a reference point here, took place between February 17 and March 17, 2021.

1.5 Citizens' feelings of optimism regarding their country's progress in the next ten years, share saying they feel "optimistic" minus share saying they feel "pessimistic," different policy areas, November 2021, percent

Data and illustration provided to the Munich Security Conference by Kekst CNC. In answer to the question "How optimistic do you feel about your country's progress in the next 10 years in the following areas?" Respondents were given the following options: "very optimistic," "somewhat optimistic," "neither optimistic/pessimistic," "somewhat pessimistic," and "very pessimistic." Figures shown are the net of the total percentage for "optimistic" minus the total percentage for "pessimistic."

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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 34-35.

Explaining the Index

1. 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.
2. 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.

Selected Highlights from the Munich Security Index 2022

1.9 Citizens' perceptions of other countries, share saying country is an ally minus share saying country is a threat, November 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).

1.10 Perceptions of other countries as threats or allies, change between February/March and November 2021

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']." "NATO" comprises Canada, France, Germany, Italy, the UK, and the US. Fieldwork for the previous Munich Security Index, published in the Munich Security Report 2021 and used as a reference point here, took place between February 17 and March 17, 2021.

1.11 Citizens' preferences for their country's response to the rise of China, share saying that their country should oppose China minus share saying that their country should cooperate with China, November 2021, percent

Illustration by the Munich Security Conference based on data provided by Kekst CNC. In answer to the question "What do you think your country should do in response to the rise of China as a military and economic power?" Respondents were given the following options: "fully cooperate with China," "somewhat cooperate with China," "stay neutral," "somewhat oppose China," "fully oppose China," and "don't know." Figures shown are the net of the total percentage for "oppose" minus the total percentage for "cooperate."

1.12 Citizens' views on China invading Taiwan, share saying risk is high, February/March and November 2021, percent

Illustration by the Munich Security Conference based on data provided by Kekst CNC. In answer to the question "Here are some specific risks. How great a risk do the following things pose to the world? China invading Taiwan [on a 0–10 scale, where 0 is a 'very low' and 10 is a 'very high' risk]?" The figure indicates the percentage of respondents who think the risk is greater than 6 out of 10. Fieldwork for the previous Munich Security Index, published in the Munich Security Report 2021 and used as a reference point here, took place between February 17 and March 17, 2021.

1.13 Citizens' expectations about the risk posed by the coronavirus pandemic, November 2021, percent

Illustration by the Munich Security Conference based on data provided by Kekst CNC. 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 coronavirus pandemic." Respondents were given the following options: "increase a lot," "increase a little," "stay the same," "decrease a little," and "decrease a lot." Figures shown here are the net of the total percentage for "increase" and the net of the total percentage for "decrease," with the gray area representing the rest.

1.14 Citizens' support for binding net zero emission targets, November 2021, percent

Illustration by the Munich Security Conference based on data provided by Kekst CNC. In answer to the question "Do you agree or disagree with the following statements about your country and climate change? We should agree to binding targets to get to net zero CO_2 emissions." Respondents were given the following options: "strongly agree," "slightly agree," "neither agree nor disagree," "slightly disagree," "strongly disagree," and "don't know." Figures shown here combine the net responses agreeing and disagreeing, with the gray area representing the rest.

1.15 Citizens' assessments of food shortages, share saying risk will increase, February/ March and November 2021, percent

Illustration by the Munich Security Conference based on data provided by Kekst CNC. 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:

food shortages." Respondents were given the following options: "increase a lot," "increase a little," "stay the same," "decrease a little," and "decrease a lot." Figures shown are the aggregate of "increase a lot" and "increase a little." Fieldwork for the previous Munich Security Index, published in the Munich Security Report 2021 and used as a reference point here, took place between February 17 and March 17, 2021.

2 Afghanistan: Losing Heart

2.1 Socio-economic development in Afghanistan, 2000 and latest, selected indicators

Illustration by the Munich Security Conference. Figures for all indicators except "expected years of schooling" and "opium production" are based on "World Development Indicators: DataBank," Washington, DC: World Bank, November 2021, https://perma.cc/X69V-3LWQ. Figures for "expected years of schooling" (total and female) are based on "Human Development Reports: Expected Years of Schooling (Years)," New York: UNDP, November 2021, https://perma.cc/B89U-VQJK and "Human Development Reports: Expected Years of Schooling, Female (Years)," New York: UNDP, November 2021, https://perma.cc/4BED-ZMVN. For the data on opium production see "Afghanistan Opium Survey 2020: Cultivation and Production – Executive Summary," Vienna: UNODC, April 2021, https://perma.cc/MV9W-PZ76, 5.

2.2 Number of fatalities in Afghanistan, 2000–2021

Illustration by the Munich Security Conference based on Neta C. Crawford and Catherine Lutz, "Human Cost of Post-9/11 Wars: Direct War Deaths in Major War Zones," Providence: Brown University, Watson Institute, September 1, 2021, https://perma.cc/Y8Y9-GC4C. The figure for "US military" also includes civilian personnel of the US Department of Defense. The numbers of the Watson Institute are approximations based on the reporting from several original data sources. Not all original sources are updated through mid-August 2021. Also note that the numbers of the Watson Institute for civilian fatalities and US military fatalities were updated by the Munich Security Conference and include the death of 13 US service members and 170 civilians in the Kabul airport terror attack of August 26, 2021. See Adam Nossiter and Eric Schmitt, "U.S. Launches Strike on ISIS-K as Bombing's Death Toll Soars," The New York Times, August 27, 2021, https://perma.cc/VE4P-DDXF.

2.3 Number of international troops in Afghanistan, 2000–2021

Illustration by the Munich Security Conference. The figures for 2001 to 2019 are based on Sam Gollob and Michael E. O'Hanlon, "Afghanistan Index: Tracking Variables of Reconstruction and Security in Post-9/11 Afghanistan," Washington, DC: Brookings Institution, August 2020, https://perma.cc/57SE-46G3, 5–6. For the years 2020 and 2021, the data for "other troops" is based on "Resolute Support Mission: Resolute Support Mission (RSM): Key Facts and Figures," Brussels: NATO, February 2020, https://perma.cc/2UEU-V3CW, and "Resolute Support Mission: Resolute Support Mission (RSM): Key Facts and Figures," Brussels: NATO, February 2021, https://perma.cc/MDY4-SUS3. The figures for the US troop level in 2020 and 2021 are based on Clayton Thomas, "U.S. Military Withdrawal and Taliban Takeover in Afghanistan:

Frequently Asked Questions," Washington, DC: Congressional Research Service, September 17, 2021, https://perma.cc/Q2MU-V2WH, 7. Note that the figures for 2001 to 2019 were calculated based on annual averages. For 2020, the data for the US troop level refers to June, for "other troops" to February. For 2021, the figures show the US troop level for January, for "other troops" for February. Also note that the figures include the troops sent to Afghanistan under the NATO-led missions – first International Security Assistance Force (ISAF), later Resolute Support Mission (RSM) – as well as under the US-directed counterterrorism mission. For a detailed breakdown of the contributing nations to the NATO-led missions see "Nato and Afghanistan: RSM and ISAF Placemats Archive," Brussels: NATO, November 2021, https://perma.cc/87TN-VE4J.

3 Mali and the Sahel: Commitment Issues

3.1 International efforts in the Sahel, 2021
Illustration by the Munich Security Conference based on data provided by the Center for International Peace Operations (ZIF). An earlier version of this illustration was published in ZIF, "The Crisis in the Sahel Region," Berlin: ZIF, November 2020, https://perma.cc/J55N-JGCG. Sources used by ZIF for this illustration include the African Center for Strategic Studies (2019), ICPAC GeoPortal (2014), the UN Multidimensional Integrated Stabilization Mission in Mali (MINUSMA), the European External Action Service (EEAS), the G5 Sahel Secretariat, and the French Armed Forces Headquarters (EMA). Note that the illustration already reflects changes to Operation Barkhane's bases in Mali and Niger, which took place as part of the announced reduction of Operation Barkhane. Further note that the borders shown on this map are not intended to be exhaustive and do not imply official endorsement. The icon placements do not represent a precise geographic location.

3.2 Number of personnel in missions and operations and internally displaced persons in the Sahel region
Illustration by the Munich Security Conference. The figures on the number of internally displaced persons from 2016 to 2020 are based on UNHCR, "R4Sahel. Coordination Platform for Forced Displacements in Sahel," n.a.: UNHCR, October 31, 2021, https://perma.cc/8B6Z-NZEM. The figures on the number of personnel in missions and operations from 2013 to 2020 are based on data provided by SIPRI. The figures include numbers on the personnel of EUCAP Sahel Mali, EUCAP Sahel Niger, EUTM Mali, G5 Joint Force, MINUSMA, MISAHEL, Operation Barkhane, and Operation Serval. They do not include the number of personnel from the EU's Takuba Task Force.

3.3 Civilian deaths as a result of violence by various perpetrators, 2020
Illustration by the Munich Security Conference based on data provided by The Armed Conflict Location & Event Data Project (ACLED). Note that the figures include all ACLED events in which civilians were directly targeted. Events count as separate when they occur on different days, involve different types of violence, occur with different types of actors or happen in different locations. See "Armed Conflict Location & Event Data Project (ACLED). User Quick Guide," n.a.: ACLED, April 2019, https://perma.cc/98UR-ZTEP.

4 Horn of Africa and the Arabian Gulf: Red Sea Alert

4.1 Selected military bases and choke points for global trade in the Red Sea region, 2021

Illustration by the Munich Security Conference based on Neil Melvin, "The Foreign Military Presence in the Horn of Africa," Stockholm: SIRPI, Background Paper, April 2019, https://perma.cc/DRV2-U4UR, 2, and additional research by the Munich Security Conference. For additional military bases included in the map see Andreu Sola-Martin, "Ports, Military Bases and Treaties: Who's Who in the Red Sea," *The Africa Report,* November 13, 2020, https://perma.cc/F883-ZYSR. The Multinational Force and Observers (MFO) is a peacekeeping force supervising the Egyptian-Israeli peace treaty and ensuring freedom of navigation through the Straits of Tiran. As of late 2021, 1,154 soldiers from 13 countries, including the US, Italy, Australia, are parts of the MFO, see Multinational Force and Observers, "Military Personnel by Country," Egypt: MFO, December 21, 2021, https://perma.cc/QK7C-EK93. The military bases illustrated are a non-exhaustive selection of bases with high relevance for the geopolitical dynamics in the Red Sea region. Facilities planned or under discussion are not displayed. Trade choke points illustrated are based on Elana DeLozier, "The Case for a Holistic U.S. Policy Toward the Emerging Red Sea Region," Washington, DC: Washington Institute, Policy Notes 102, April 1, 2021, https://perma.cc/V9RL-K77X, 3. Please note that this map is for illustrative purposes only. The icon and arrow placements do not represent a precise geographic location. Please note that the boundaries shown on this map are not intended to be exhaustive and do not imply official endorsement.

4.2 Piracy and armed robbery against ships, 2005–2020, number of actual and attempted attacks

Illustration by the Munich Security Conference based on International Chamber of Commerce – International Maritime Bureau (ICC-IMB) reports. For data used for the 2005 to 2008 period see ICC-IMB, "Piracy and Armed Robbery Against Ships: Annual Report 1 January – 31 December 2009," London: ICC-IMB, January 2010, https://perma.cc/DC7V-CJPG, 5–6; for the 2009 to 2013 period see ICC-IMB, "Piracy and Armed Robbery Against Ships: Annual Report 1 January – 31 December 2013," London: ICC-IMB, January 2014, https://perma.cc/MAV7-KNE5, 5–6; for the 2014 to 2016 period see ICC-IMB, "Piracy and Armed Robbery Against Ships: Annual Report 1 January – 30 June 2018," London: ICC-IMB, July 2018, https://perma.cc/B8SP-JBSZ, 6; for the 2017 to 2021 period see ICC-IMB, "Piracy and Armed Robbery Against Ships: Annual Report 1 January – 30 June 2021," London: ICC-IMB, July 2021, https://perma.cc/95DW-3PKB, 6. Incidents in the Red Sea region include (attempted) attacks that occurred in territorial waters of Somalia, Oman, and Kenya. The ICC attributes all incidents that occurred in the Gulf of Aden, the Red Sea, the Indian Ocean, and the Arabian Sea to Somali pirates.

4.3 Number of internally displaced persons in the world's ten largest internal displacement crises, 2020, millions

Illustration by the Munich Security Conference based on UNHCR, "Global Trends: Forced Displacement in 2020," Geneva: UNHCR, June 18, 2021, https://perma.cc/93H5-YE2W.

5 Eastern Europe: Unquiet on the Eastern Flank

5.1 Public perceptions of Belarus, Russia, and Ukraine among European NATO members, share saying country is an ally minus share saying country is a threat, November 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). The European NATO members surveyed for the index are France, Germany, Italy, and the UK.

5.2 Citizens' views on specific risks posed by Russia, share saying risk is high, November 2021, percent

Data and illustration provided to the Munich Security Conference by Kekst CNC. In answer to the questions "Here are some specific risks. How great a risk do the following things pose to the world [on a 0–10 scale, where 0 is a 'very low' and 10 is a 'very high' risk]?: Russia hacking elections." And: "Russia attacking a NATO country on its western border." The first figure in each cell indicates the ppercentage of respondents who think the risk is greater than 6 out of 10.

5.3 Citizens' preferences for their country's response to Russia, share saying that their country should oppose Russia minus share saying that their country should cooperate with Russia, November 2021, percent

Data and illustration provided to the Munich Security Conference by Kekst CNC. In answer to the question "What do you think your country should do in response to the Russia as a military and economic power?" Respondents were given the following options: "fully cooperate with Russia," "somewhat cooperate with Russia," "stay neutral," "somewhat oppose Russia," "fully oppose Russia," and "don't know." Figures shown are the net of the total percentage for "oppose" minus the total percentage for "cooperate."

6 Technology: Supply Chains of Command

6.1 Projected increase in climate hazards to semiconductor manufacturing hubs in East Asia

Data and illustration by the McKinsey Global Institute based on Jonathan Woetzel et al., "Could Climate Become the Weak Link in Your Supply Chain?" n.a.: McKinsey Global Institute, August 6, 2020, https://perma.cc/UF3T-PTUF. For details on the selection of Representative Concentration Pathways 8.5 and the methodology for estimating the likelihood of and physical risk from extreme hurricanes, see Woetzel et al., 5, 19.

6.2 Selected trade balances for semiconductors, 2016–2020, USD billions

Data and illustration by the Mercator Institute for China Studies (MERICS). MERICS' analysis is based on data from Comtrade and the Taiwan Directorate General of Customs. For the purpose of this analysis, semiconductors encompass products categorized under HS8542 ("Integrated circuits and microassemblies") of the Harmonized Commodity Description and Coding System of the World Customs Organization.

6.3 Share of EU imports of critical technology goods and resources from third countries, 2019, percent

Data and illustration by the Munich Security Conference based on analysis of the BACI database provided by the European Commission Directorate-General for Internal Market, Industry, Entrepreneurship, and SMEs (DG GROW) for 137 products for which the EU is highly dependent on imports. From among these 137 products, the graphic shows third-country import shares of the top ten (by total import value) technology-related products and raw materials, as selected by the MSC. For details, see European Commission "Strategic Dependencies and Capacities," Brussels: European Commission, Staff Working Document 352, May 5, 2021, https://perma.cc/L8L4-Z8GM, 19–23.

7 Global Inequality: Gap Years

7.1 Global income inequality, 1990–2019, Gini coefficient

Illustration by the Munich Security Conference based on data from the World Income Inequality Database (WIID). See Carlos Gradín, Finn Tarp, and Murray Leibbrandt, "Global Inequality May Be Falling, but the Gap Between Haves and Have-Nots Is Growing," *The Conversation,* September 2, 2021, https://perma.cc/2VTM-6V4J. The Gini coefficient is a measure of inequality that ranges between zero (everybody has the same income, perfect equality) and 100 (all the income is held by one person, maximum inequality). The data covers 209 countries and territories. For more information on the data see Carlos Gradín, "Technical Note: WIID Companion (May 2021): Global Income Distribution," Helsinki: UNU-WIDER, May 31, 2021, https://perma.cc/Z4VS-Q8ST. The data is available at https://perma.cc/B78K-4QPM.

7.2 Share of national wealth owned by a country's wealthiest one percent, 2021, percent

Data and illustration based on "Top 1% National Income Share," Paris: World Inequality Database, 2021, https://perma.cc/T4W2-XK5G. Please note that the borders shown on this map are not intended to be exhaustive and do not imply official endorsement.

7.3 Likelihood of dying of Covid-19 per 100,000 people by socio-economic vulnerability type, United States, 2020

Data and illustration based on Ingrid Millán et al., "US Hispanic and Latino Lives and Livelihoods in the Recovery From Covid-19," n.a.: McKinsey & Company, September 2, 2020, https://perma.cc/P46R-TDYX.

7.4 Share of people who received at least one dose of the Covid-19 vaccine, January 2022, percent

Illustration by the Munich Security Conference based on Hannah Ritchie et al., "Share of People Who Received at Least One Dose of COVID-19 Vaccine," Oxford: Our World in Data, January 3, 2022, https://perma.cc/2YEE-JUD5. The data was last updated on January 1, 2022. Please note that data for China – an upper-middle income country – is reported at irregular intervals. The four income groups are based on the World Bank's income classification.

7.5 Citizens' views on the possibility of containing the coronavirus domestically, even as other countries still lack vaccines, November 2021, 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: it is possible to contain Covid-19 in my country without the whole world getting vaccines." Respondents were given the following options: "strongly agree," "slightly agree," "neither agree nor disagree," "slightly disagree," "strongly disagree," and "don't know." Figures shown here combine the net responses agreeing and disagreeing, with the gray area representing the rest.

7.6 Per capita consumption emissions of global income groups, 1990 versus 2030, tonnes of CO_2
Data and illustration based on Tim Gore, "Carbon Inequality in 2030: Per Capita Consumption Emissions and the 1.5°C Goal," Oxford, Institute for European Environmental Policy; Oxfam, November 2021, https://perma.cc/4BM3-3JE3. The illustration is based on analyses by the Institute for European Environmental Policy and the Stockholm Environment Institute. Note that the illustration is based on the following annual incomes of the different income groups in 2030 (based on 2011 USD Purchasing Power Parity): more than 172,000 US dollars for the richest one percent; more than 55,000 US dollars for the richest ten percent; more than 9,800 but less than 55,000 US dollars for the middle 40 percent; and less than 9,800 US dollars for the poorest 50 percent.

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List of Abbreviations

5G	Fifth generation mobile broadband network
ACLED	Armed Conflict Location & Event Data Project
AI	Artificial intelligence
ARD	Arbeitsgemeinschaft der öffentlich-rechtlichen Rundfunkanstalten der Bundesrepublik Deutschland, German Public Broadcaster
BRICS	Brazil, Russia, India, China, South Africa
COVAX	Covid-19 Vaccines Global Access
Covid-19	Coronavirus disease 2019
ECFR	European Council on Foreign Relations
ECOWAS	Economic Community of West African States
EEAS	European External Action Service
eFP	enhanced Forward Presence
EU	European Union
EUCAP Sahel Mali	EU Capacity Building Mission in Mali
EUCAP Sahel Niger	EU Capacity Building Mission in Niger
EUTM in Mali	European Union Training Mission Mali
FDSM	Forces de défense et de sécurité maliennes
G7	Group of 7 (Canada, France, Germany, Italy, Japan, United States, United Kingdom)
GPPi	Global Public Policy Institute
IGAD	Intergovernmental Authority on Development
IMF	International Monetary Fund
IPCC	International Panel on Climate Change
IRC	International Rescue Committee
ISIS	Islamic State
ISIS-K	Islamic State-Khorasan Province
IT	Information technology
MFO	Multilateral Force and Observers
MINUSMA	Multidimensional Integrated Stabilization Mission in Mali
MISAHEL	Mission de l'Union africaine pour le Mali et le Sahel
MSC	Munich Security Conference
MSI	Munich Security Index
MSR	Munich Security Report
NATO	North Atlantic Treaty Organization
New START	New Strategic Arms Reduction Treaty
OCHA	United Nations Office for the Coordination of Humanitarian Affairs
OECD	Organisation for Economic Co-operation and Development
PLA	People's Liberation Army
SDGs	Sustainable Development Goals
SIPRI	Stockholm International Peace Research Institute
SWP	Stiftung Wissenschaft and Politik (German Institute for International and Security Affairs)
TSMC	Taiwan Semiconductor Manufacturing Company

TTC	EU-US Trade and Technology Council
UAE	United Arab Emirates
UK	United Kingdom of Great Britain and Northern Ireland
UN	United Nations
UNDP	United Nations Development Programme
UNHCR	United Nations High Commissioner for Refugees
UNODC	United Nations Office on Drugs and Crime
US	United States of America
USD	US dollar
USAID	United States Agency for International Development
V-Dem Institute	Varieties of Democracy Institute, based at the Department of Political Science at the University of Gothenburg in Sweden
WHO	World Health Organization
ZIF	Zentrum für Internationale Friedenseinsätze (Center for International Peace Operations)
ZOiS	Zentrum für Osteuropa und internationale Studien (Centre for East European and International Studies), Berlin

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Latest MSC Publications

Tobias Bunde and Benedikt Franke (eds.), The Art of Diplomacy: 75+ Views Behind the Scenes of World Politics
Berlin: Econ, 2022, ISBN 978-3-430-21077-5.
In this book, renowned companions of Ambassador Wolfgang Ischinger – including several current and former heads of state and government – reflect on basic questions of diplomacy on the occasion of his 75th birthday. Taking the reader behind the scenes of diplomacy, they reveal their most astonishing experiences, successes, and failures on the diplomatic stage, and outline their ideas for the diplomatic handling of unresolved challenges.
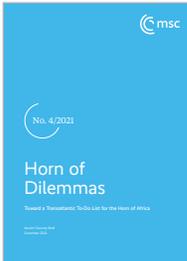
Luca Miehe, "Horn of Dilemmas: Toward a Transatlantic To-Do List for the Horn of Africa"
Munich: Munich Security Conference, Munich Security Brief 4, December 2021, https://doi.org/10.47342/XXEB4946.
The Horn of Africa is adrift. Turmoil in Ethiopia and Sudan is sending shockwaves through the broader region – with knock-on effects for European and US interests. While the African Union is in the lead when it comes to addressing these issues, transatlantic partners must coordinate and do their part to tackle the crises in Europe's extended neighborhood. The Munich Security Brief shows how transatlantic partners could move forward.

Wolfgang Ischinger and Joseph S. Nye, Jr., "Mind the Gap: Priorities for Transatlantic China Policy – Report of the Distinguished Reflection Group on Transatlantic China Policy"
Munich/Berlin/Washington, DC: Munich Security Conference, Mercator Institute for China Studies, Aspen Strategy Group, July 2021, https://doi.org/10.47342/GXWK1490.
China is at the top of the transatlantic agenda. Throughout the first half of 2021, the Distinguished Reflection Group on Transatlantic China Policy, comprised of 21 individuals with a wealth of expertise on China and transatlantic relations, worked to advocate for a more joined-up approach to China. Its report proposes a transatlantic agenda focused on achieving quick wins, with recommendations organized into seven issue areas, from economics to values to security.

Simon Pfeiffer and Randolf Carr, "Update Required: European Digital Sovereignty and the Transatlantic Partnership"
Munich: Munich Security Conference, Munich Security Brief 3, July 2021,
https://doi.org/10.47342/TBAA1644.
European policymakers have made explicit commitments to strengthening Europe's digital sovereignty, especially where dependencies affect security. There is a need for decisive action to secure Europe's core digital capabilities for the future. The third Munich Security Brief of 2021 showcases where Europe is still ahead, where it must catch up, and how its technological capabilities serve not only itself, but also the transatlantic partnership.
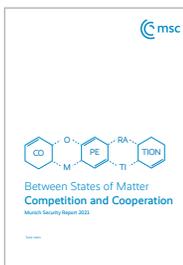
Tobias Bunde, Sophie Eisentraut, Laura Hartmann, Randolf Carr, Julia Hammelehle, Juliane Kabus, Luca Miehe, Simon Pfeiffer, Franziska Stärk, and Amadée Mudie-Mantz, "Munich Security Report 2021: Between States of Matter – Competition and Cooperation"
Munich: Munich Security Conference, June 2021,
https://doi.org/10.47342/CYPE1056.
The world's liberal democracies are facing renewed competition with autocratic systems of rule. The 2021 Munich Security Report explores the challenge of navigating an international environment shaped by two "states of matter": competition and cooperation.

Simon Pfeiffer and Randolf Carr, "Error 404 – Trust Not Found: A European Survey on Digital (Dis)trust"
Munich: Munich Security Conference, Munich Security Brief 2, March 2021,
https://doi.org/10.47342/REFQ1817.
A joint tech agenda is one of the key priorities of a renewed transatlantic partnership. However, an exclusive survey on behalf of the Munich Security Conference points to a potential obstacle: high levels of distrust in Europe around digital issues – among Europeans, but especially toward the United States. The second Munich Security Brief of 2021 explains what digital distrust means and how to address it on the way to better transatlantic tech cooperation.

Imprint

About the Munich Security Conference (MSC)
The Munich Security Conference is the world's leading forum for debating international security policy. In addition to its annual flagship conference, the MSC regularly convenes high-profile events around the world. The MSC publishes the annual Munich Security Report and other formats on specific security issues.

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A mounting tide of crises that reinforce each other threatens to overwhelm our societies and political systems. Whether it is the seemingly endless coronavirus pandemic, the increasingly tangible threat of climate change, the vexing vulnerabilities of an interconnected world, or rising geopolitical tensions, all these challenges add up to a feeling of a loss of control, as data from the Munich Security Index shows. There is a real risk that the perception of "collective helplessness" may prevent the world from addressing the most important crises before it is too late. While the challenges are real, the tools and resources needed to address them are, in fact, available. If we can "unlearn helplessness" and demonstrate that democracies can still deliver, we have a chance to turn the tide – together and for good.

Tobias Bunde, Sophie Eisentraut, Natalie Knapp, Randolf Carr, Julia Hammelehle, Isabell Kump, Luca Miehe, and Amadée Mudie-Mantz, "Munich Security Report 2022: Turning the Tide – Unlearning Helplessness," Munich: Munich Security Conference, February 2022, https://doi.org/10.47342/QAWU4724.