

# Tokyo Conference 2026 Global Expert Survey

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The Genron NPO



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The Genron NPO / Tokyo Conference 2026

## **The Global Expert Survey on the International Order and Relations between the Major Powers**

### **< Executive Summary >**

#### **I. Survey objectives and methods**

The objective of this survey was to clarify the opinions of researchers and other experts affiliated with the world's leading think tanks about the future of the international order and the relationships between the major powers in preparation for Tokyo Conference 2026. The survey was conducted between 23 January and 23 February, 2026, and in cooperation with 36 organizations around the world, responses were obtained from 293 individuals in 26 countries. Responses are grouped by nationality rather than organizational affiliation in order to clarify any regional differences in opinion.

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#### **II. A new premise: The power-based order is the new normal**

A total of 62.1% of respondents around the world believe that the use of unilateral force and coercion on the part of major powers is not a temporary phenomenon but will rather become a central feature of the international community in the future. This opinion was held by a majority of respondents in Japan (86.3%), the rest of Asia (74.3%), the US (64.3%), and Europe (60%).

The rise of the power-based order is seen not as an exception to the rule but as indicative of the transforming structure of the international order.

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#### **III. An unstable multipolar world, not a G2**

The survey showed that experts do not believe that the expansion of the power-based order will necessarily lead towards a bipolar system dominated by the US and China (i.e., a G2 framework). Of all experts surveyed, 71.1% rejected the proposal that the world is already or could potentially become a part of a G2 framework.

The most commonly held view (at 53.5%) is that the world will develop into a multipolar framework that, rather than being focused on two powers, will instead have power distributed between numerous major countries and/or regions.

A subsequent question revealed that 44.9% of respondents see the world reaching a multipolar equilibrium divided into spheres of influence dominated by the major powers. However, 21.8% of experts feel that conflicts between such spheres of influence could intensify and lead to a major crisis.

The prevailing view among those surveyed is that global power will not converge on the two major powers in a G2 system, but will instead diverge to form an unstable multipolar equilibrium characterized by multiple spheres of influence.

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#### **IV. The rules-based order: Not collapsing, but reduced to a shell**

Only 10.3% of respondents believe that the post-war international order will completely cease to function, while 45.9% believe that the actions of the major powers will reduce it to a shell of its former self. However, 32.1% still believe there is room to revive the order if serious effort is made, and 6.3% believe that it will continue to exist regardless.

Overall, the consensus is that the liberal international order has not yet collapsed but proactive action must be taken to ensure it continues to function.

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#### **V. Redefining multilateralism: Complete restoration or limited cooperation?**

Only 12.8% of respondents believe that it is possible to restore comprehensive multilateral cooperation. In contrast, 67.4% believe that only limited regional or issue-based cooperation is possible.

The most realistic option is seen to be a restructuring of multilateralism into a more limited framework based on regions or on issues being addressed rather than a restoration of a comprehensive framework that spans all potential issues.

Regarding which bodies will lead such a restructured framework, the EU (66%) and a coalition of the middle powers (61.4%) are seen as having the most potential.

Only a minority believe that the UN will return to the center of the international order, and the idea is growing that it will play only a complementary role in addressing security issues and global challenges.

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#### **VI. Alliance realignment: Alliances remain, but level of dependence is shifting**

Regarding how allies of the US should address recent US strategy, 56.9% of global experts responded that countries should maintain their alliances while increasing their autonomy, and 38.9% believe that they should reassess their alliances and reduce dependence on the US.

The general consensus is not a rejection of the alliances, but rather signifies a desire to reassess the one-sided dependence that is an artifact of the Cold War era.

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#### **VII. A new touchstone: Technology**

Survey participants were asked whether AI can be incorporated into the international governance framework, and 66.6% expressed concern about the potential for unregulated competition and increased division. Respondents in Europe, Canada, the US, and Asia outside of Japan are particularly pessimistic.

In contrast, 33.3% of Japanese respondents believe that it is still possible to integrate AI into the governance framework. While the technology sector is becoming increasingly fragmented, some still believe that there is potential for its use in system design.

### **VIII. Acceptance of “peace through power”**

A majority of experts (60.6%) believe that the use of military intervention – i.e., “peace through power” – is unacceptable regardless of objective, while 24.7% responded that caution is needed when attempting to justify such actions. Only 14.1% of respondents believe that such actions are acceptable under certain conditions.

While there is some consensus regarding the idea that the power-based order is expanding, few believe that “peace through power” should be considered a legitimate principle within the international order.

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### **IX. What roles can be played in a power-based order by the middle powers and experts?**

Among respondents globally, 24% believe that cooperation between the middle powers could serve as a driving force for maintaining the international order, while 64% feel that they would be better suited to playing a restraining role when dealing with certain issues and regions.

Regarding the role that experts can play, 53.6% believe that they should provide insight for use in conflict management, 52.6% believe that they should propose practical measures, and 41.2% believe that they should formulate a plan for a rules-based, cooperative framework.

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### **X. Conclusion: The international order is shaped through action**

The results of this survey indicate that while the power-based order is becoming the new normal, experts believe that the power is not converging within a bipolar G2 framework but rather diverging towards multipolarity within an unstable equilibrium centered on spheres of influence.

In addition, while the rules-based order has not yet collapsed, the consensus does suggest it has entered a stage in which it cannot be maintained without proactive action.

The international order will not endure without intervention. We must make unavoidable choices about where cooperation must be maintained and where the lines must be drawn.

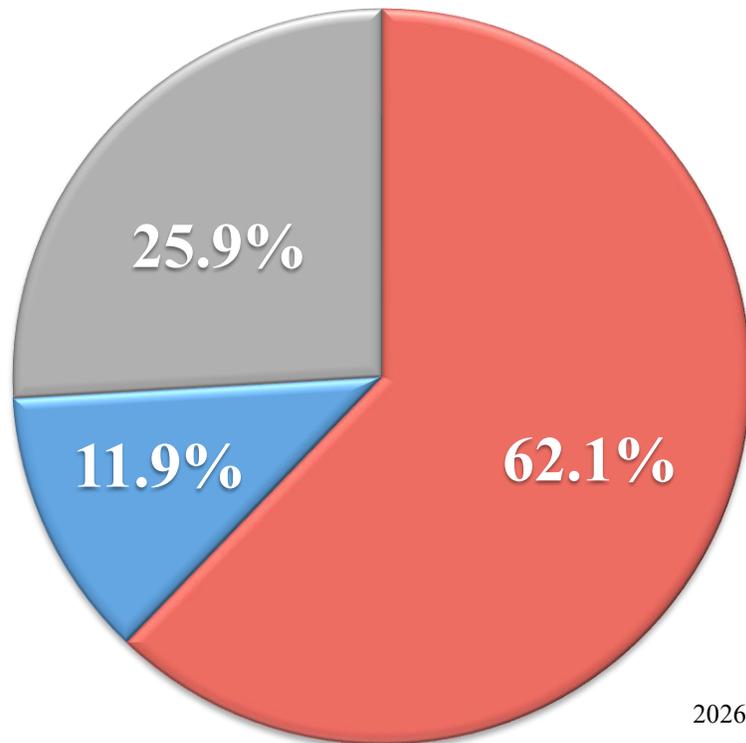
Only by making and acting upon those choices can we shape the future of the international order.

<Results from the Global Expert Survey (All 15 Questions) >

**Question 1: Is the current “power-based order” a temporary phenomenon?**

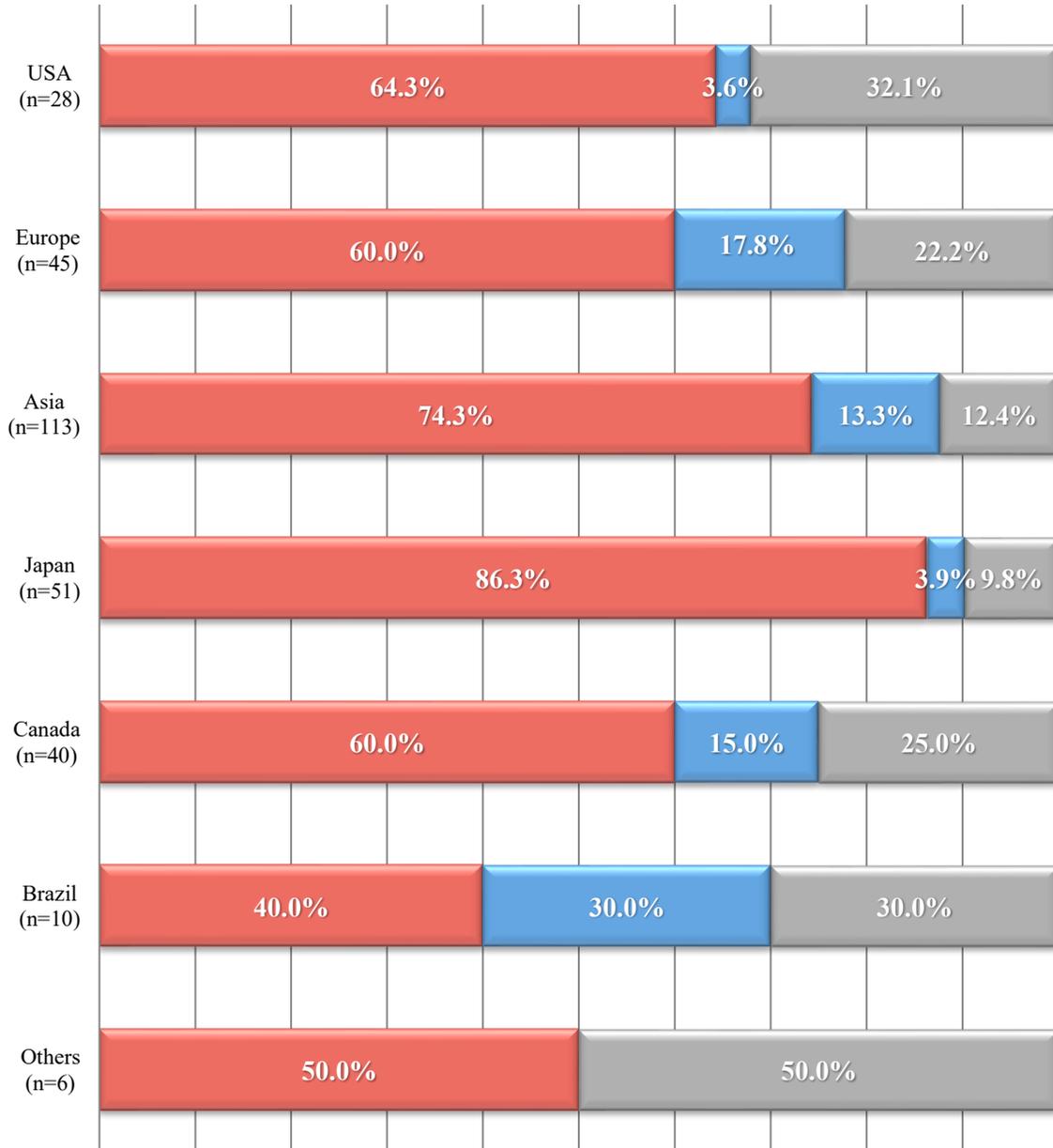
It has been suggested that the United States and other major powers are exerting greater influence over international society through the use of unilateral force and coercion. According to 62.1% of global experts surveyed, this “power-based order” is not a temporary phenomenon, but will become a central feature of the international community in the future. This opinion was particularly evident (at 86.3%) among experts in Japan and the rest of Asia. Only 11.9% of all experts surveyed believe that the situation is likely to be temporary.

- It will become a central feature of the international community
- It is likely to be temporary
- Unsure at this juncture



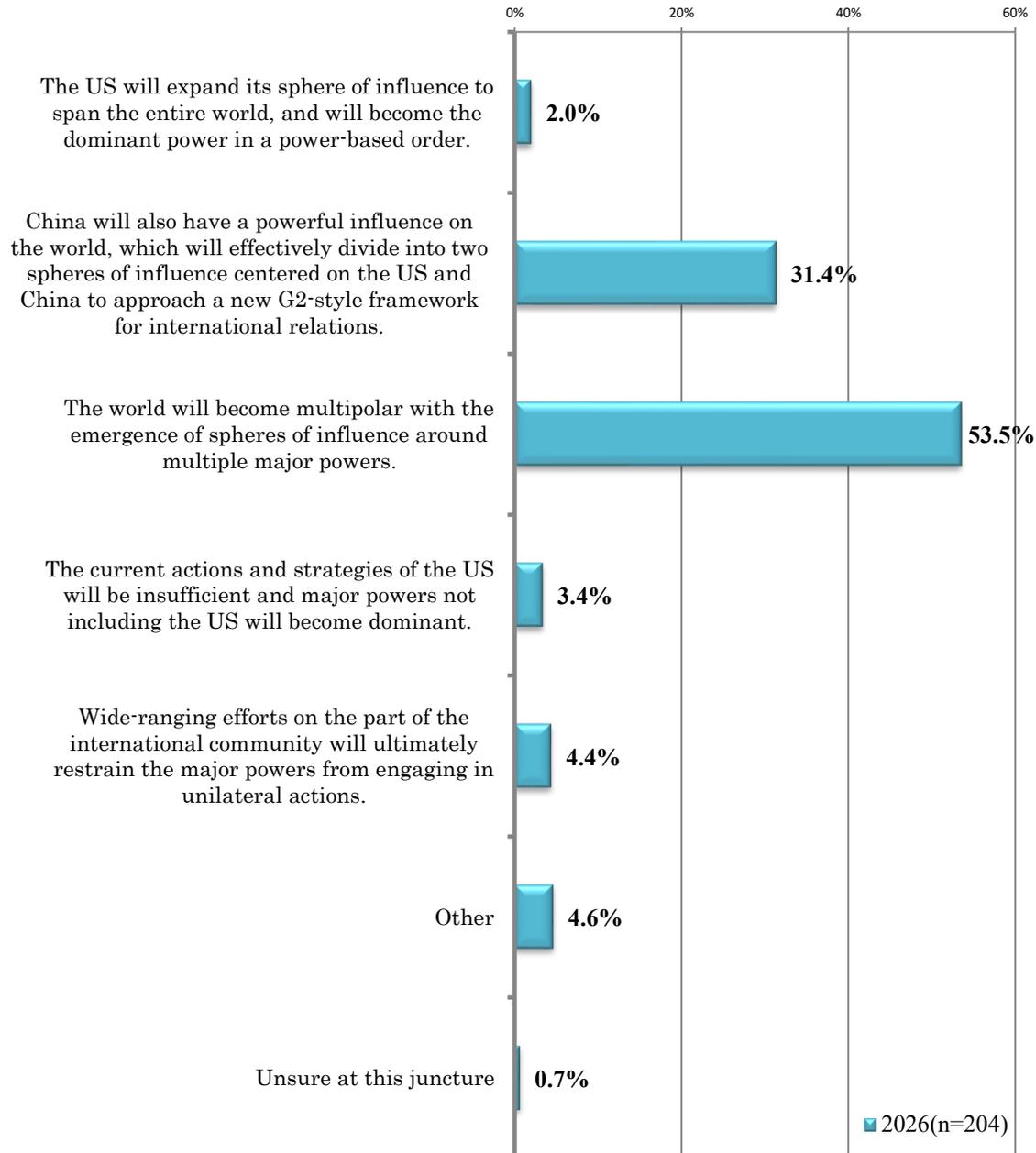
## Results by Country/Region

- It will become a central feature of the international community
- It is likely to be temporary
- Unsure at this juncture



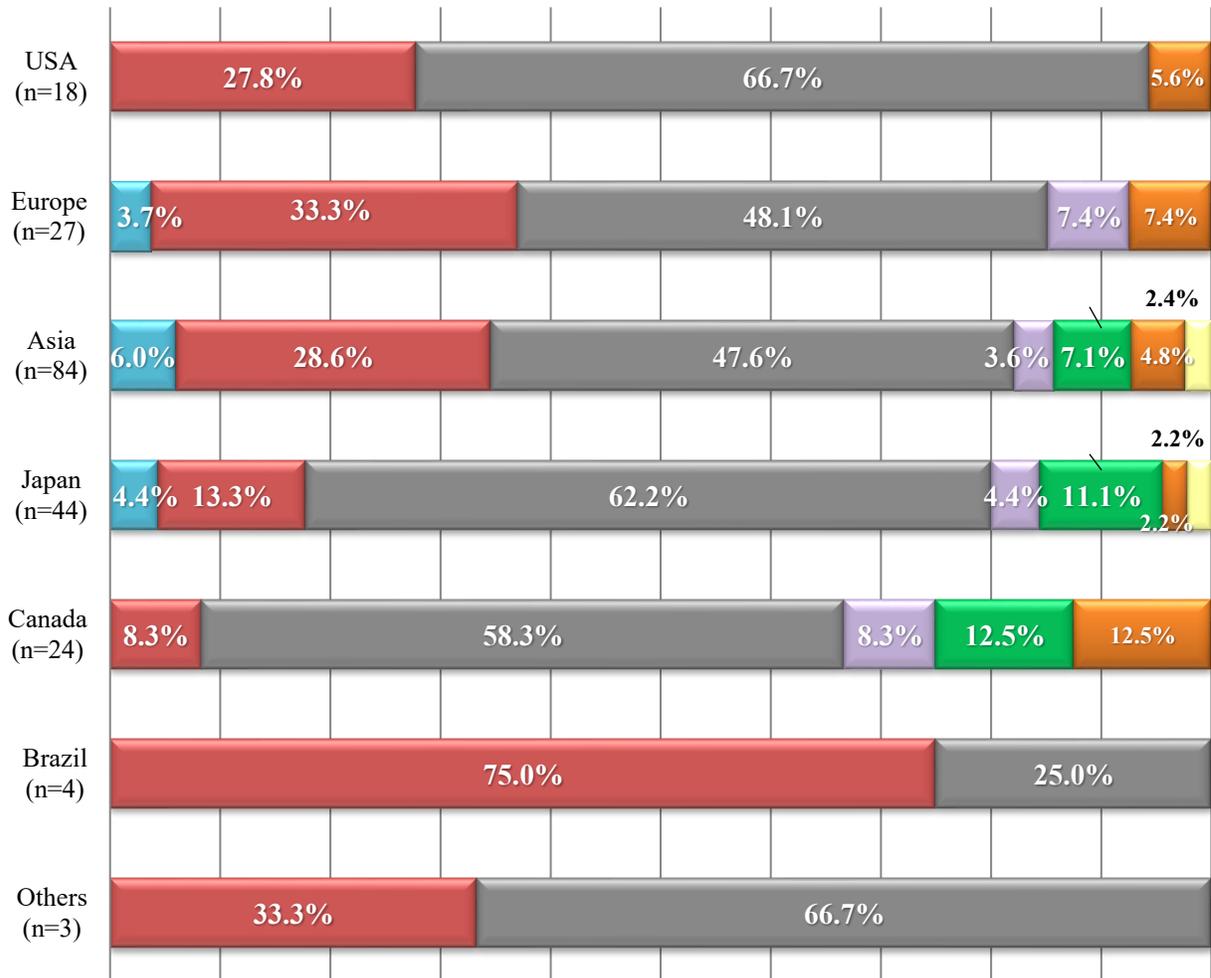
## Question 2: How will the world evolve under a power-based order?

Experts who believe the power-based order will become a central feature of international society were asked what effect that would have on the world. Over half (53.5%) predict that the world will become multipolar, with multiple major powers forming their own spheres of influence. In contrast, 31.4% believe the world will evolve into a US-China G2 framework, and only 2.0% believe that the US will be the sole dominant power.



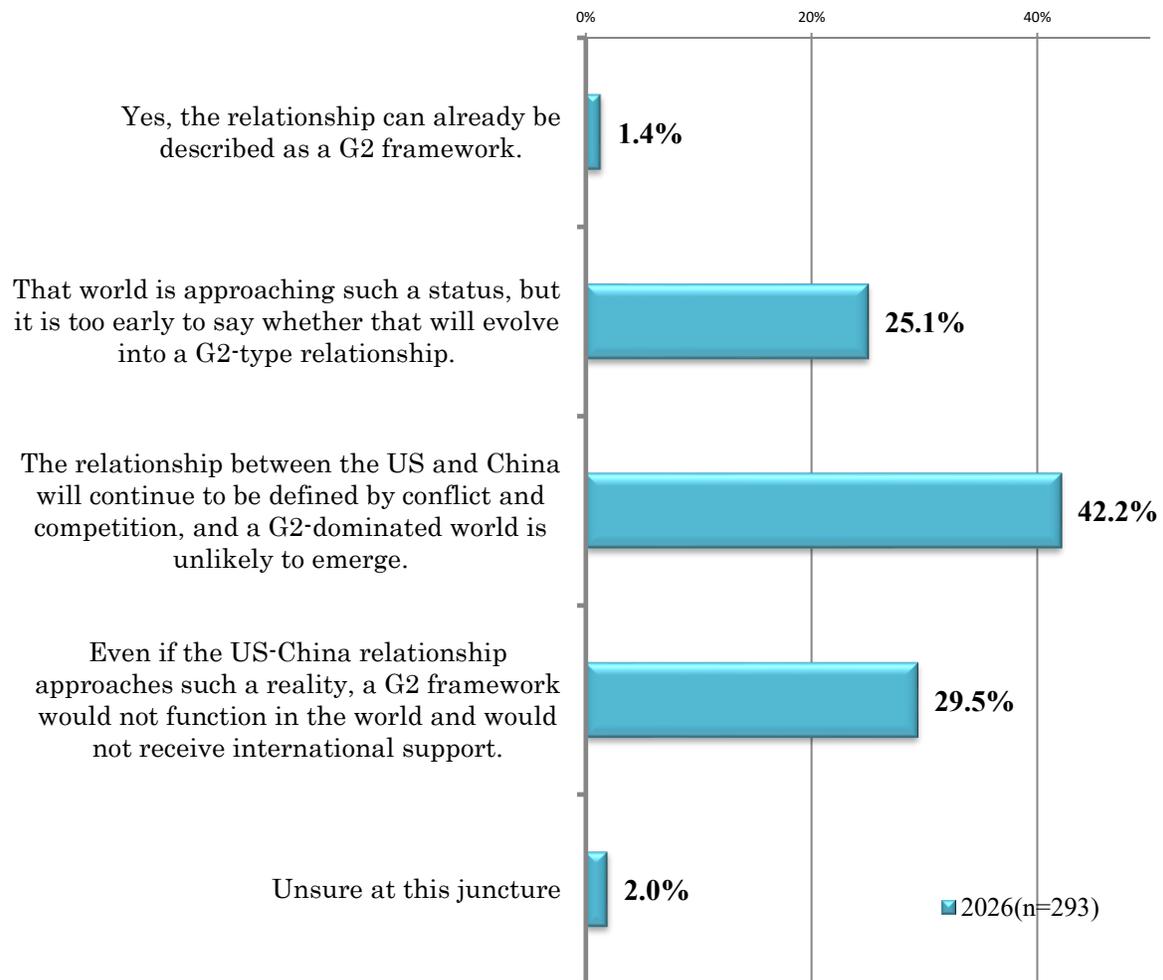
## Results by Country/Region

- The US will expand its sphere of influence to span the entire world, and will become the dominant power in a power-based order.
- China will also have a powerful influence on the world, which will effectively divide into two spheres of influence centered on the US and China to approach a new G2-style framework for international relations.
- The world will become multipolar with the emergence of spheres of influence around multiple major powers.
- The current actions and strategies of the US will be insufficient and major powers not including the US will become dominant.
- Wide-ranging efforts on the part of the international community will ultimately restrain the major powers from engaging in unilateral actions.
- Others
- Unsure at this juncture



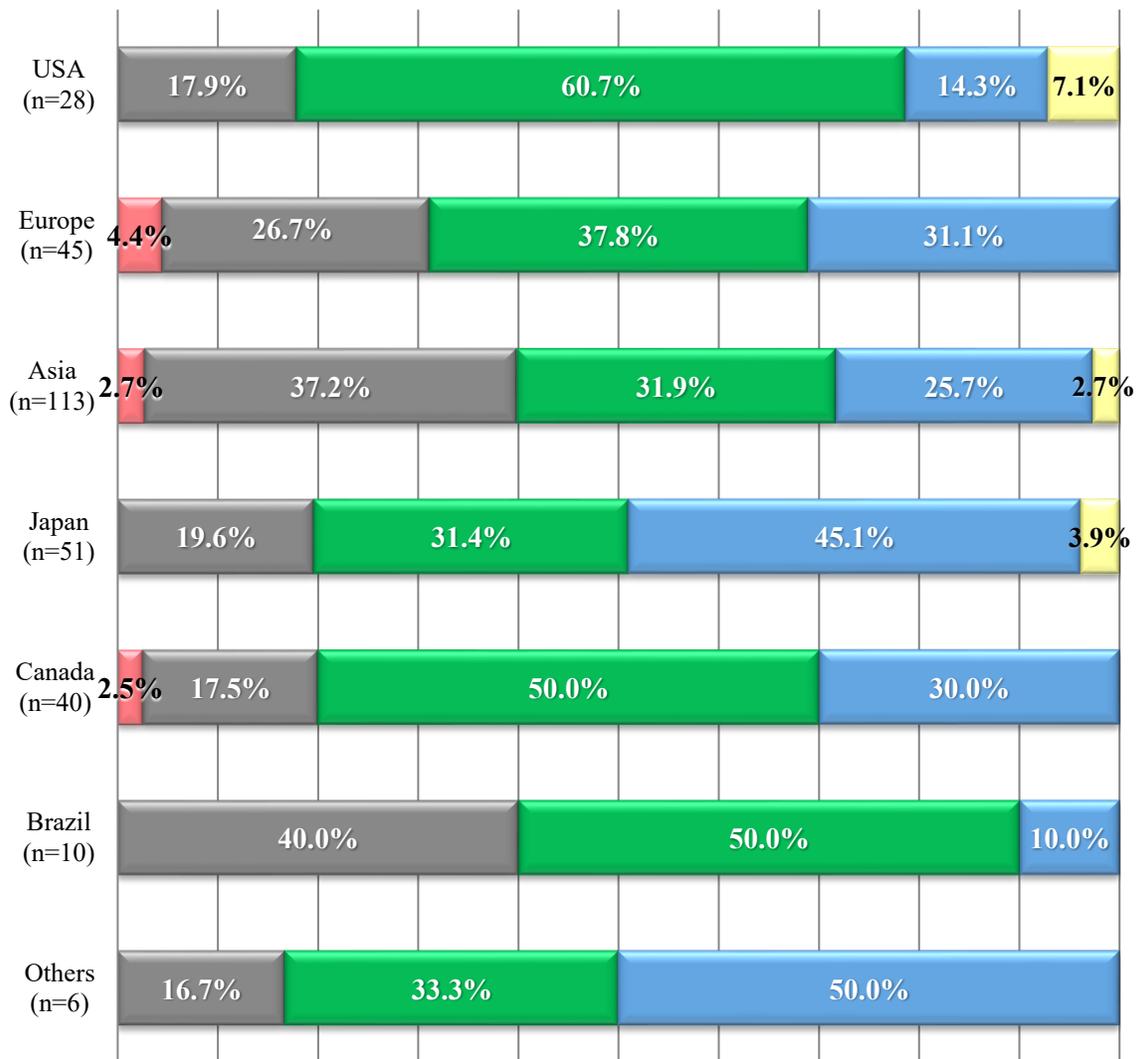
### Question 3: Is the world already controlled by a US-China G2 framework?

After recent summit-level talks between the US and China, President Trump has begun describing the current relationship between the US and China using the term “G2.” However, only 1.4% of experts surveyed believe that the relationship can be described in that way. More than 70% of respondents were skeptical about the potential for a “G2 world,” with 42.2% believing such a result unlikely as US-China relations will continue to be defined by conflict and competition, and 29.5% holding that even if such a relationship were realized, it would not function properly.



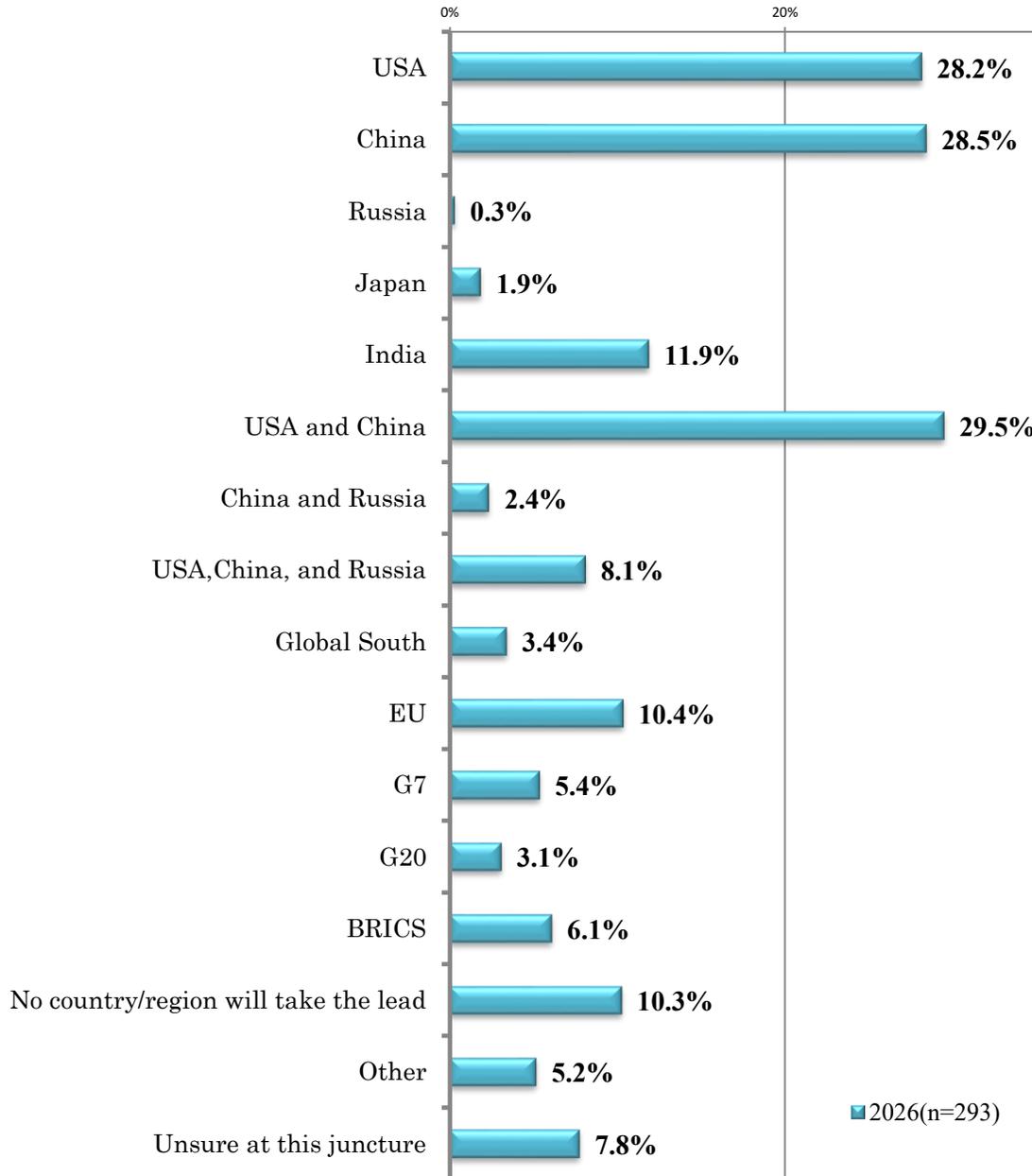
## Results by Country/Region

- Yes, the relationship can already be described as a G2 framework.
- That world is approaching such a status, but it is too early to say whether that will evolve into a G2-type relationship.
- The relationship between the US and China will continue to be defined by conflict and competition, and a G2-dominated world is unlikely to emerge.
- Even if the US-China relationship approaches such a reality, a G2 framework would not function in the world and would not receive international support.
- Unsure at this juncture



## Question 4: Which country/countries/region will lead the world in 2050?

The top three responses to this question, all roughly equal in popularity, were: 1) the US and China, 2) China, and 3) the US. While there is no overall consensus on the potential for an independent hegemonic power, the responses suggest that the many experts believe the world will continue to be dominated by the US and China for the foreseeable future. The only difference is regarding which will prevail over the other.

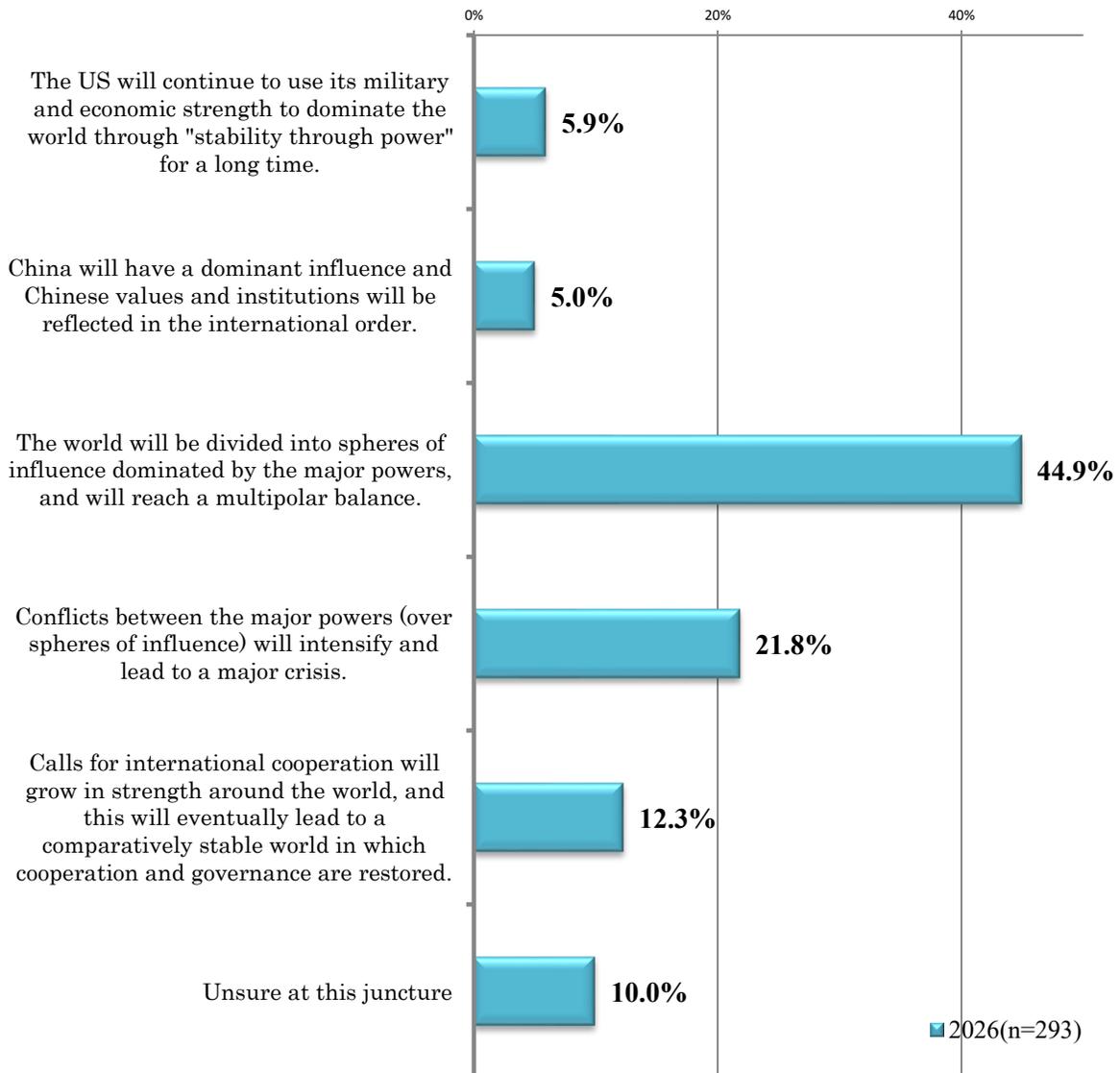


## Results by Country/Region

	USA (n=28)	Europe (n=45)	Asia (n=113)	Japan (n=51)	Canada (n=40)	Brazil (n=10)	Others (n=6)
<b>USA</b>	35.7%	20.0%	16.8%	37.3%	7.5%	30.0%	50.0%
<b>China</b>	32.1%	31.1%	28.3%	17.7%	30.0%	10.0%	50.0%
Russia	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Japan	3.6%	0.0%	3.5%	5.9%	0.0%	0.0%	0.0%
India	7.1%	6.7%	15.9%	23.5%	10.0%	20.0%	0.0%
<b>USA and China</b>	46.4%	35.6%	30.1%	47.1%	27.5%	20.0%	0.0%
China and Russia	0.0%	2.2%	1.8%	0.0%	2.5%	10.0%	0.0%
USA, China, and Russia	3.6%	2.2%	11.5%	2.0%	7.5%	30.0%	0.0%
Global south	0.0%	0.0%	8.0%	5.9%	0.0%	10.0%	0.0%
EU	25.0%	15.6%	3.5%	5.9%	22.5%	0.0%	0.0%
G7	0.0%	4.4%	8.8%	2.0%	2.5%	20.0%	0.0%
G20	0.0%	2.2%	2.7%	11.8%	5.0%	0.0%	0.0%
BRICS	0.0%	2.2%	8.8%	0.0%	5.0%	10.0%	16.7%
No country/region will take the lead	3.6%	15.6%	11.5%	2.0%	12.5%	10.0%	16.7%
Other	10.7%	2.2%	8.8%	2.0%	12.5%	0.0%	0.0%
Unsure at this juncture	3.6%	8.9%	5.3%	9.8%	10.0%	0.0%	16.7%

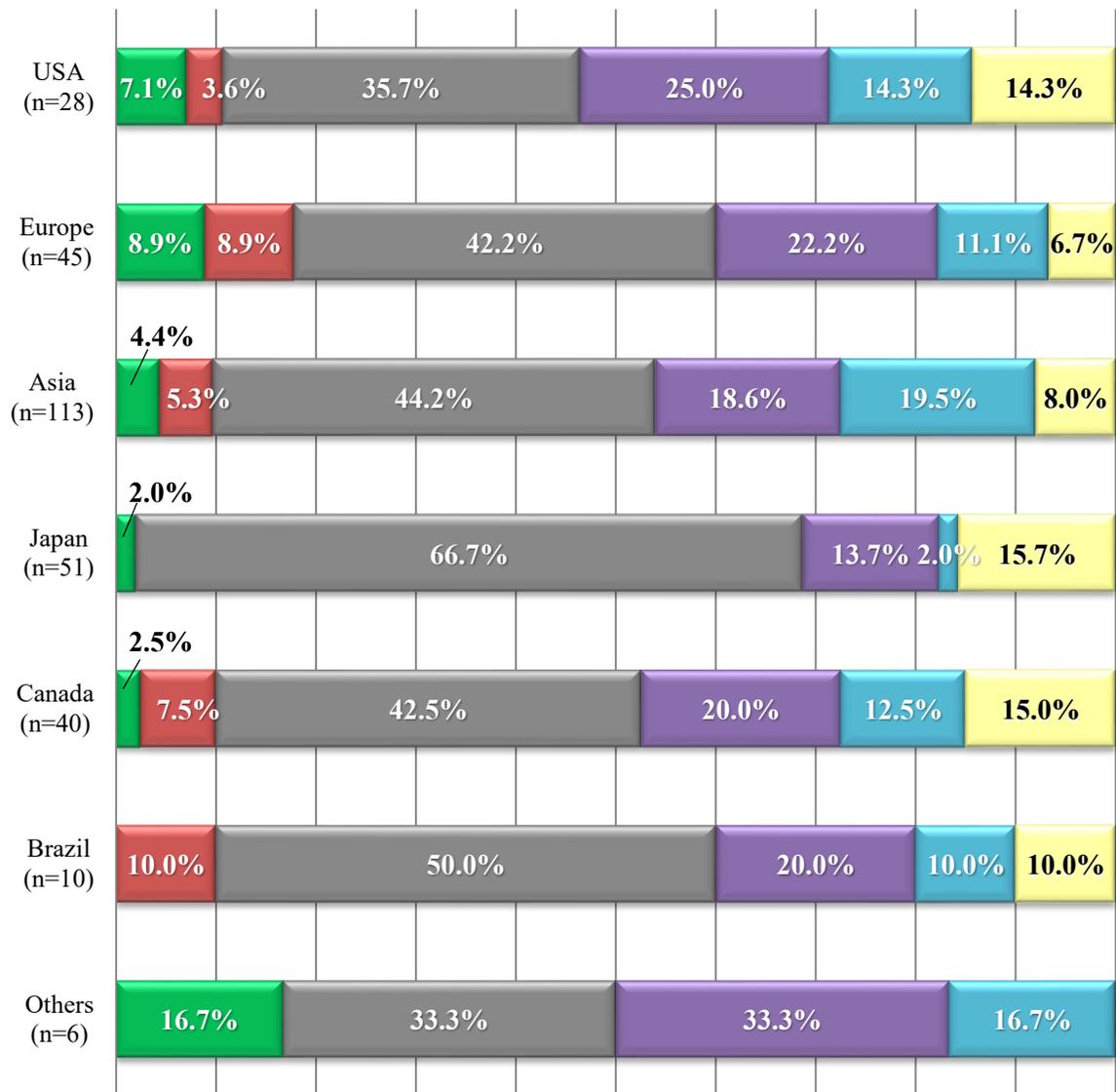
## Question 5: Long-term outlook for the world

Experts were asked which option best describes their long-term outlook for the world, and less than 10% of those surveyed indicated that the future world will be either “US-led” or “China-led.” The most commonly selected response at 44.9% was that the world will be “divided into spheres of influence dominated by the major powers, and will reach a multipolar balance.” However, there seems to be little confidence in the stability of such a multipolar equilibrium as 21.8% predict that conflict between major powers will escalate and lead to a major crisis.



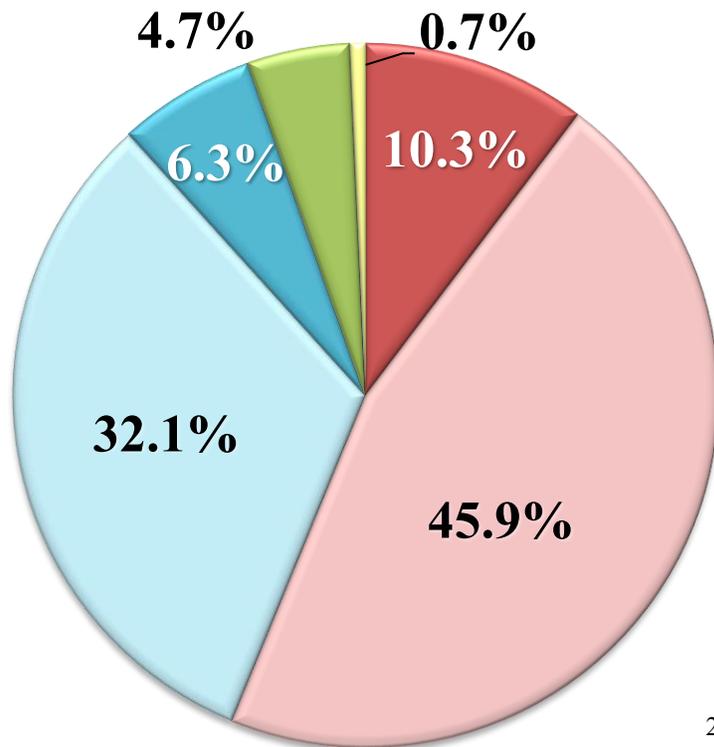
## Results by Country/Region

- The US will continue to use its military and economic strength to dominate the world through "stability through the power" for a long time.
- China will have a dominant influence and Chinese values and institutions will be clearly reflected in the international order.
- The world will be divided into spheres of influence dominated by the major powers, and will reach a multipolar balance.
- Conflict between the major powers (over spheres of influence) will intensify and lead to a major crisis.
- Calls for international cooperation will grow in strength around the world, and this will eventually lead to a comparatively stable world in which cooperation and governance are restored.
- Unsure at this juncture



## Question 6: Can the rules-based liberal international order (LIO) be revived?

Amidst increasing domination on the part of the major powers, 10.3% of experts believe that the post-war LIO will cease to function completely. However, 45.9% believe that the actions of the major powers will “reduce it to a shell of its former self.” On the other hand, 32.1% believe that the LIO can be revived if serious effort is made, and 6.3% believe that the LIO will continue to exist despite any unilateral actions on the part of the major powers. In other words, approximately 40% of respondents still believe that the LIO could still survive.

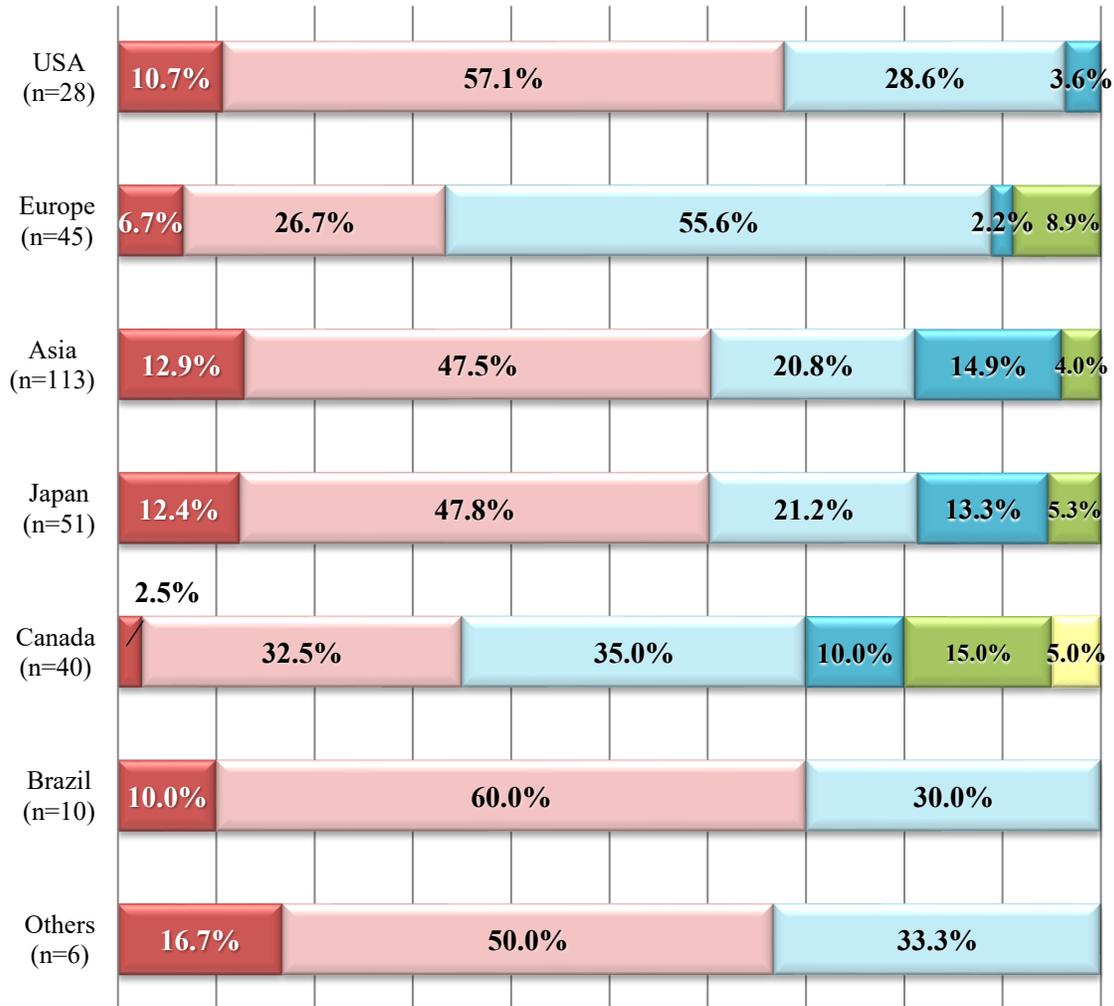


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- The LIO has already stopped functioning in many areas, and will eventually cease to function completely.
- The LIO will not be completely destroyed, but the actions of the major powers will essentially reduce it to a shell of its former self.
- There is still room to revive the LIO if serious efforts are made by the international community in important areas.
- The LIO will continue to exist despite any unilateral actions taken by the US and other major powers.
- Others
- Unsure at this juncture

## Results by Country/Region

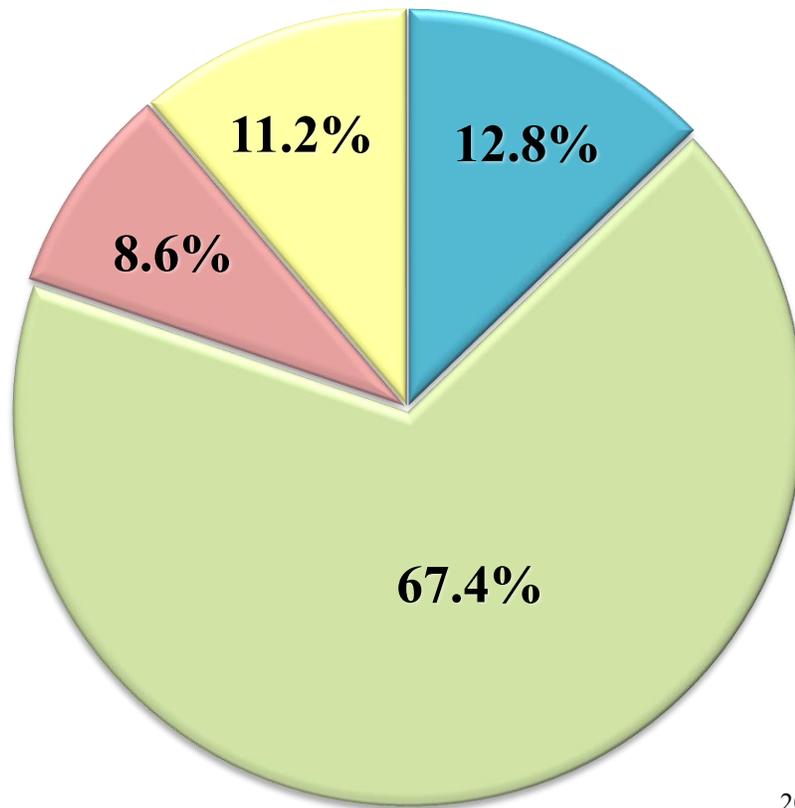
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- Other
- Unsure at this juncture



## Question 7: Can multilateralism and the rules-based LIO be restored?

Only 12.8% of experts surveyed believe that the rules-based LIO built upon multilateral cooperation can be restored. However, 67.4% believe that it will be possible to restore in a limited way in some geographic regions or areas of interest. Experts are reticent to say that multilateralism can be completely restored, but they see real potential for issue-based and region-based cooperation.

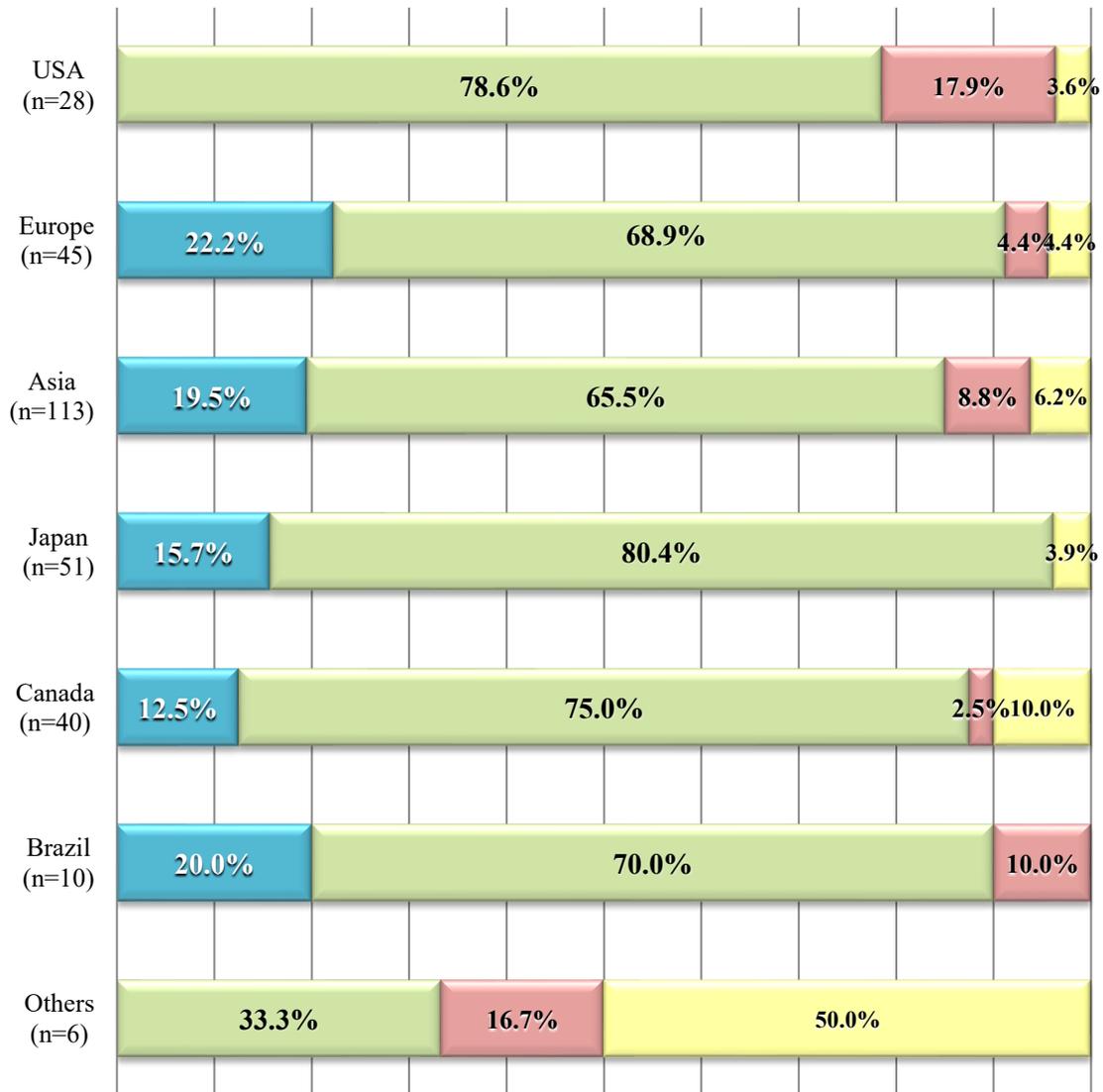
- Yes
- It will be possible in limited way in some regions and areas of interest.
- A revival of multilateralism and the LIO is unlikely
- Unsure at this juncture



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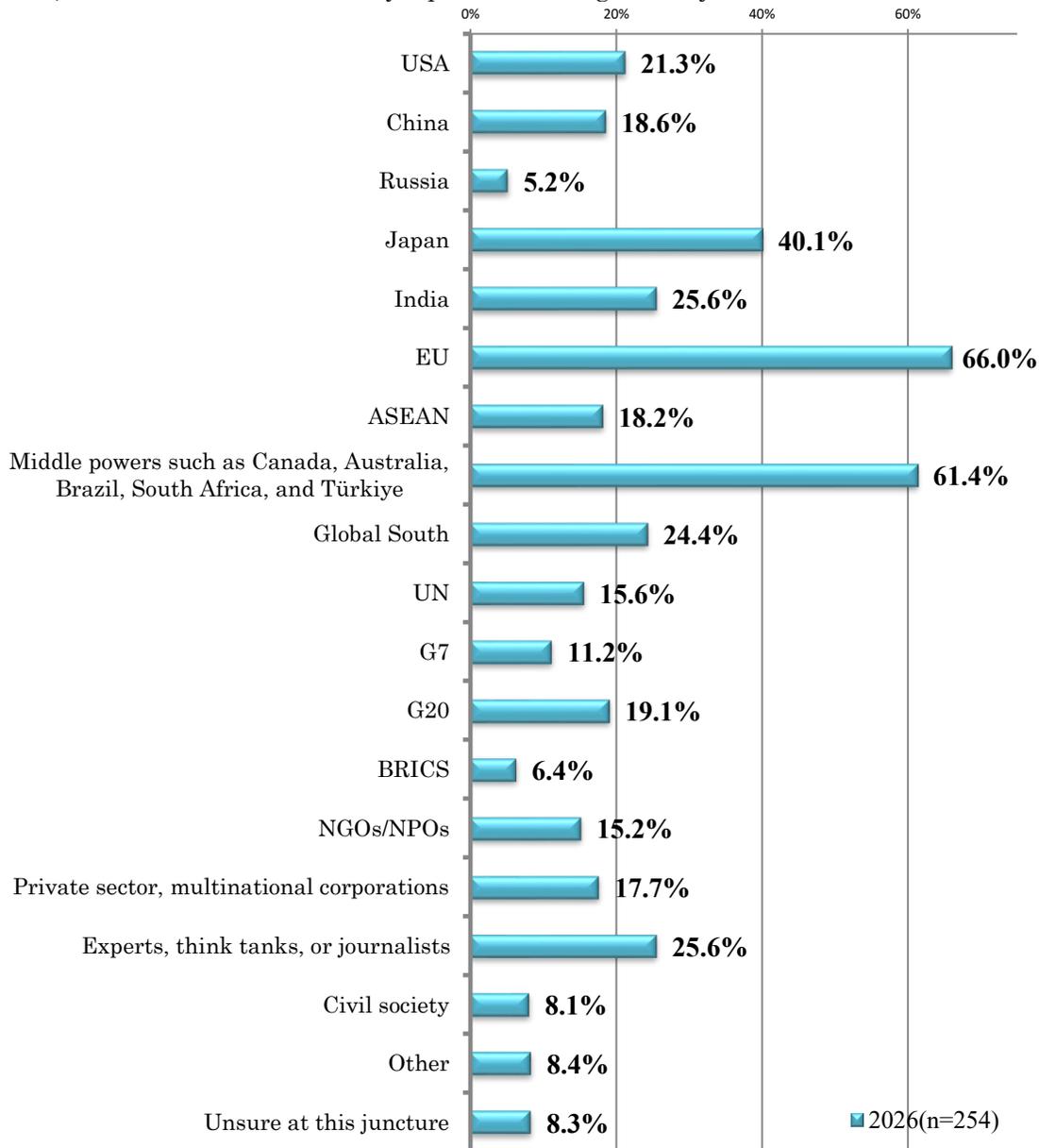
## Results by Country/Region

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- Unsure at this juncture



## Question 8: Who will lead the cooperative rules-based liberal international order?

Experts were asked which countries and regions were most likely to take the lead in maintaining and revitalizing global cooperation and the rules-based LIO. Experts have the highest expectations for the EU (66%) and the middle powers (61.4%) to play a leading role. In contrast, expectations for the US or China to play such a role are low with each hovering around the 20% mark. These results show that experts see greater potential in coalitions of countries and regions being able to share the burden in maintaining and revitalizing the LIO, rather than individual major powers leading the way.

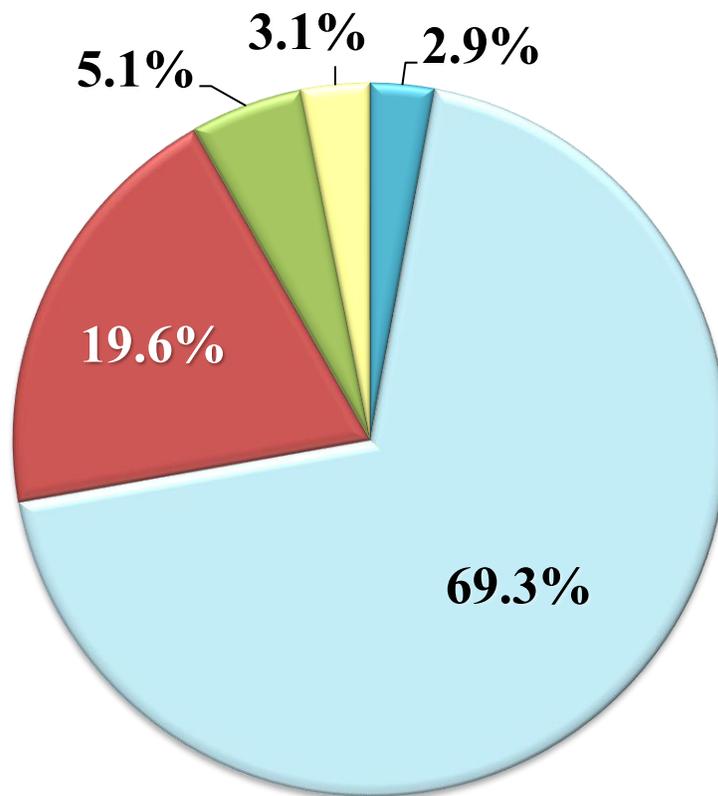


## Results by Country/Region

	<b>USA (n=22)</b>	<b>Europe (n=41)</b>	<b>Asia (n=96)</b>	<b>Japan (n=49)</b>	<b>Canada (n=35)</b>	<b>Brazil (n=9)</b>	<b>Others (n=2)</b>
<b>USA</b>	59.1%	4.9%	25.0%	34.7%	14.3%	11.1%	0.0%
<b>China</b>	22.7%	19.5%	32.3%	16.3%	28.6%	11.1%	0.0%
<b>Russia</b>	4.5%	2.4%	12.5%	6.1%	0.0%	11.1%	0.0%
<b>Japan</b>	63.6%	56.1%	39.6%	73.5%	37.1%	11.1%	0.0%
<b>India</b>	22.7%	22.0%	36.5%	8.2%	28.6%	11.1%	50.0%
<b>EU</b>	95.5%	87.8%	56.3%	81.6%	68.6%	22.2%	50.0%
<b>ASEAN</b>	13.6%	26.8%	44.8%	14.3%	17.1%	11.1%	0.0%
<b>Middle powers such as Canada, Australia, Brazil, South Africa, and Türkiye</b>	54.5%	63.4%	56.3%	75.5%	85.7%	44.4%	50.0%
<b>Global South</b>	13.6%	22.0%	26.0%	22.5%	14.3%	22.2%	50.0%
<b>UN</b>	18.2%	12.2%	15.6%	2.0%	17.1%	44.4%	0.0%
<b>G7</b>	27.3%	7.3%	14.6%	4.1%	14.3%	11.1%	0.0%
<b>G20</b>	18.2%	12.2%	13.5%	6.1%	22.9%	11.1%	50.0%
<b>BRICS</b>	4.5%	2.4%	20.8%	0.0%	5.7%	11.1%	0.0%
<b>NGO · NPO</b>	9.1%	9.8%	6.3%	6.1%	14.3%	11.1%	50.0%
<b>Private sector, multinational corporations</b>	22.7%	24.4%	22.9%	6.1%	14.3%	33.3%	0.0%
<b>Experts, think tanks, or journalists</b>	13.6%	12.2%	26.0%	10.2%	17.1%	0.0%	100.0%
<b>Civil society</b>	0.0%	12.2%	12.5%	4.1%	17.1%	11.1%	0.0%
<b>Other</b>	0.0%	4.9%	1.0%	0.0%	2.9%	0.0%	50.0%
<b>Unsure at this juncture</b>	4.5%	0.0%	1.0%	0.0%	2.9%	0.0%	50.0%

## Question 9: Is there a role for the UN in maintaining global peace?

The world currently lacks any effective means of stopping conflict, and the role of the UN is being called into question. Only 2.9% of experts surveyed believe that the UN will once again play a central role in peacekeeping. In contrast, 19.6% believe that UN-led peacekeeping no longer functions and has become merely symbolic in nature. The most commonly selected response was that the UN will continue to play a limited and complementary role in peacekeeping efforts (69.3%). This suggests that the majority believe the UN will not return to its former position, but neither will it fade away.



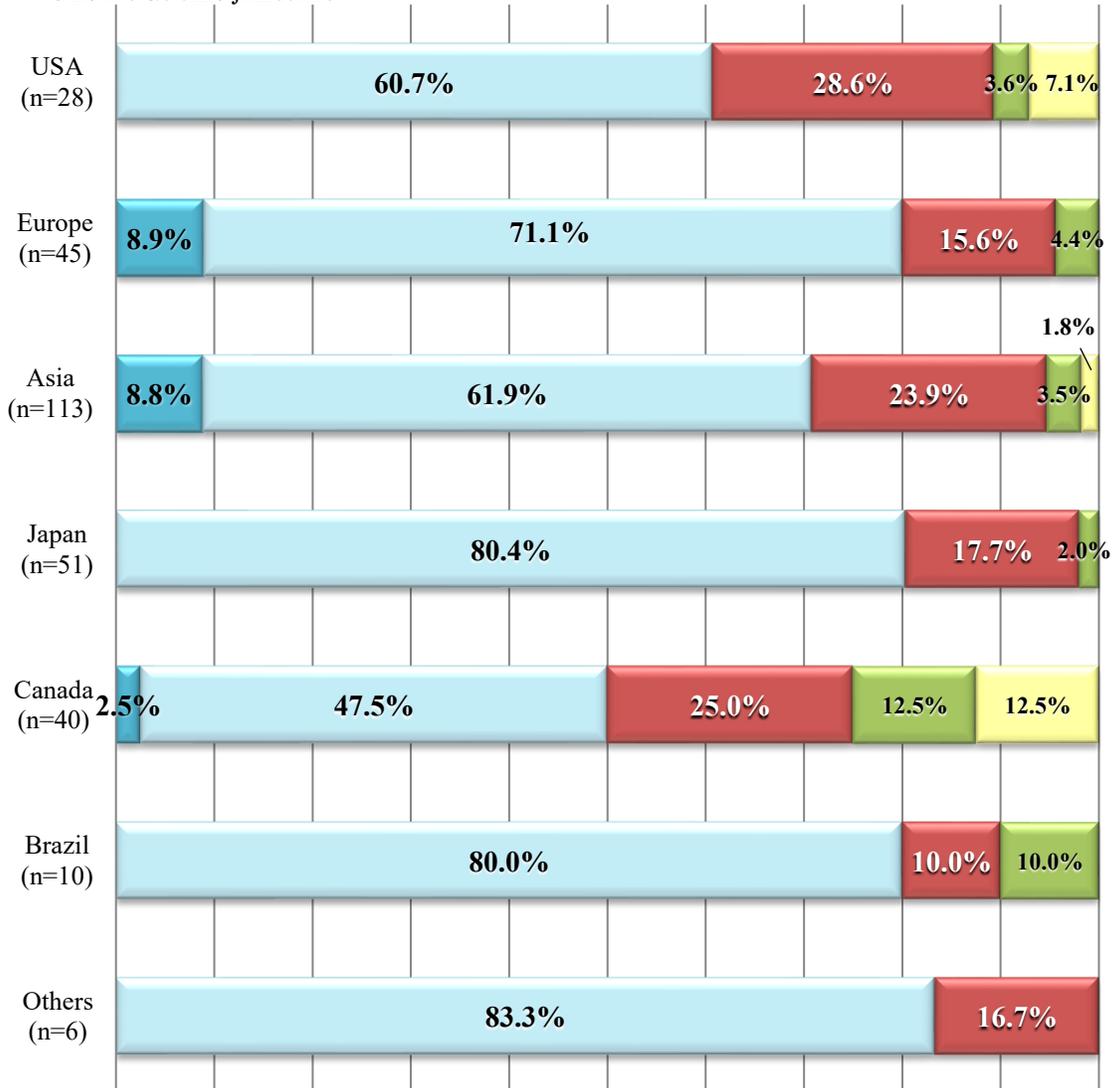
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- Various reforms will be implemented at the UN and it will resume its central role in peacekeeping.
- No drastic reforms will be implemented, but the UN will continue to play a limited, complementary role.
- UN-drive peacekeeping no longer functions, and it will remain merely a symbol.
- Other
- Unsure at this juncture

## Results by Country/Region

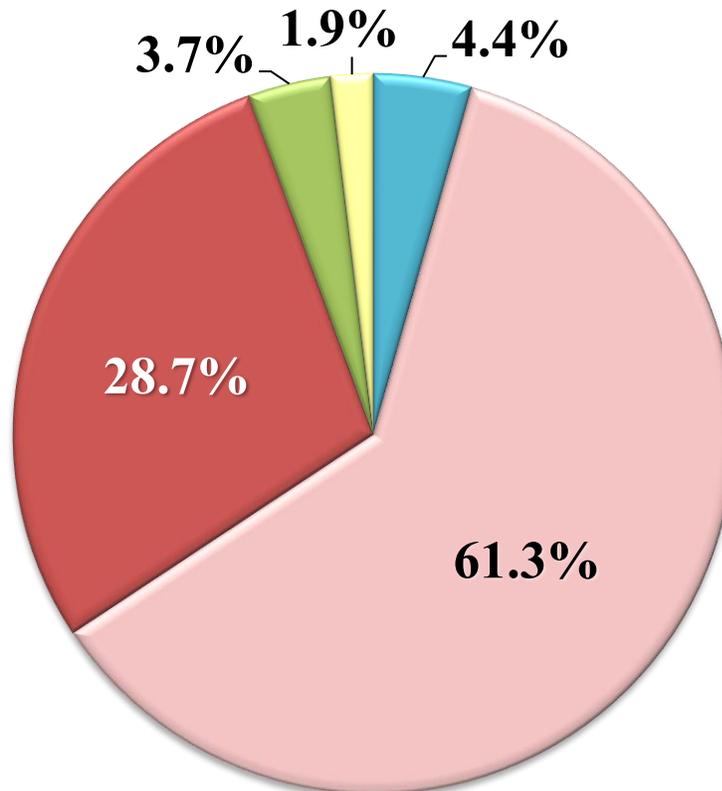
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- Other

■ Unsure at this juncture



## Question 10: What role for the UN in addressing global issues?

Experts were asked what role the UN can play in addressing climate change, health, and other global issues; 61.3% responded that while it will play an essential role in some areas, its overall influence will be limited and 28.7% believe that its overall role will diminish. Only a small minority believe that the UN will continue to play a leading role overall.

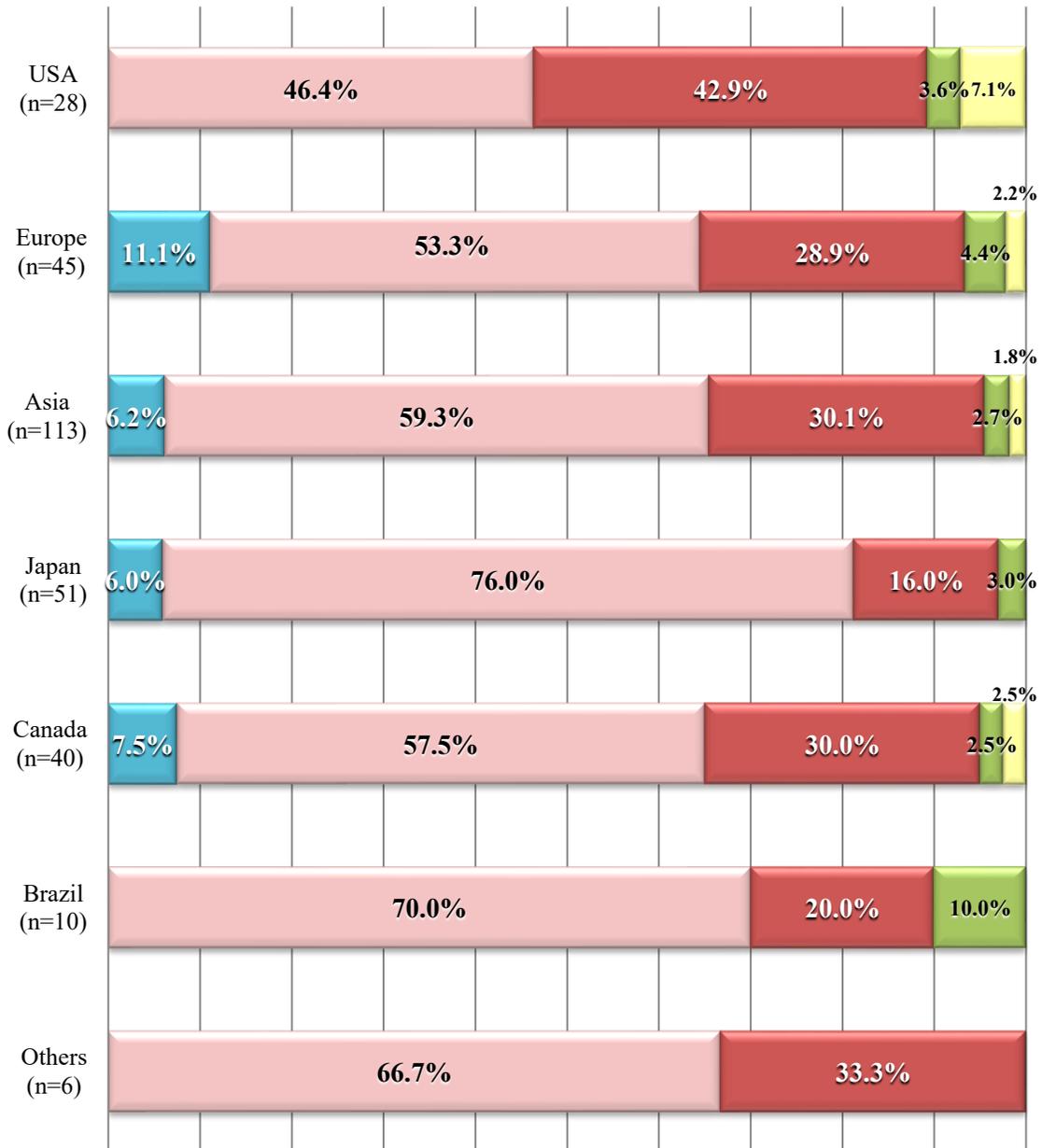


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- The UN will continue to play an important role in coordination and implementation.
- Its overall influence will be limited, but it will play an essential role in some areas.
- The role of the UN will diminish, and its significance within the multilateral framework will decline drastically.
- Other
- Unsure at this juncture

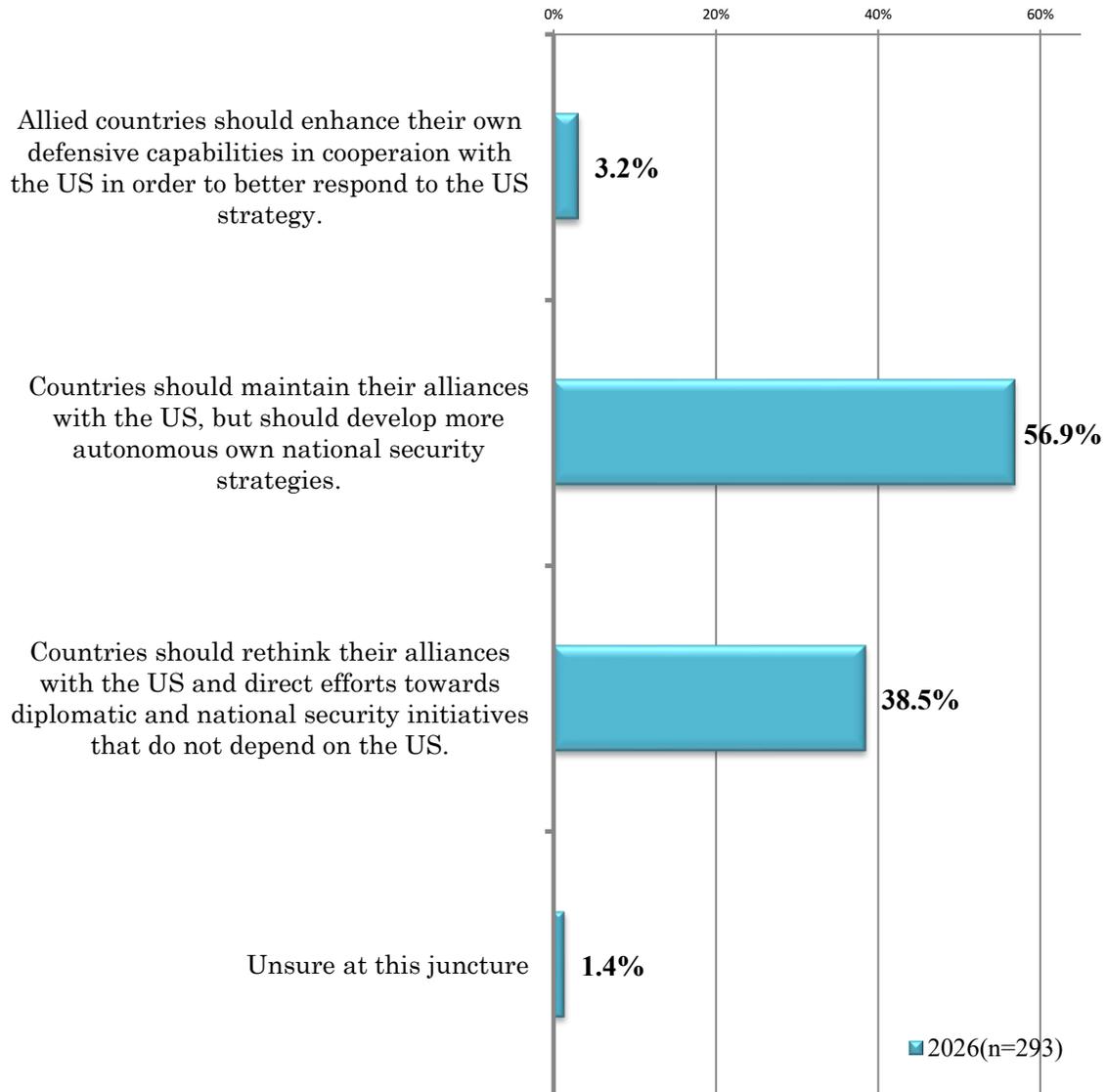
## Results by Country/Region

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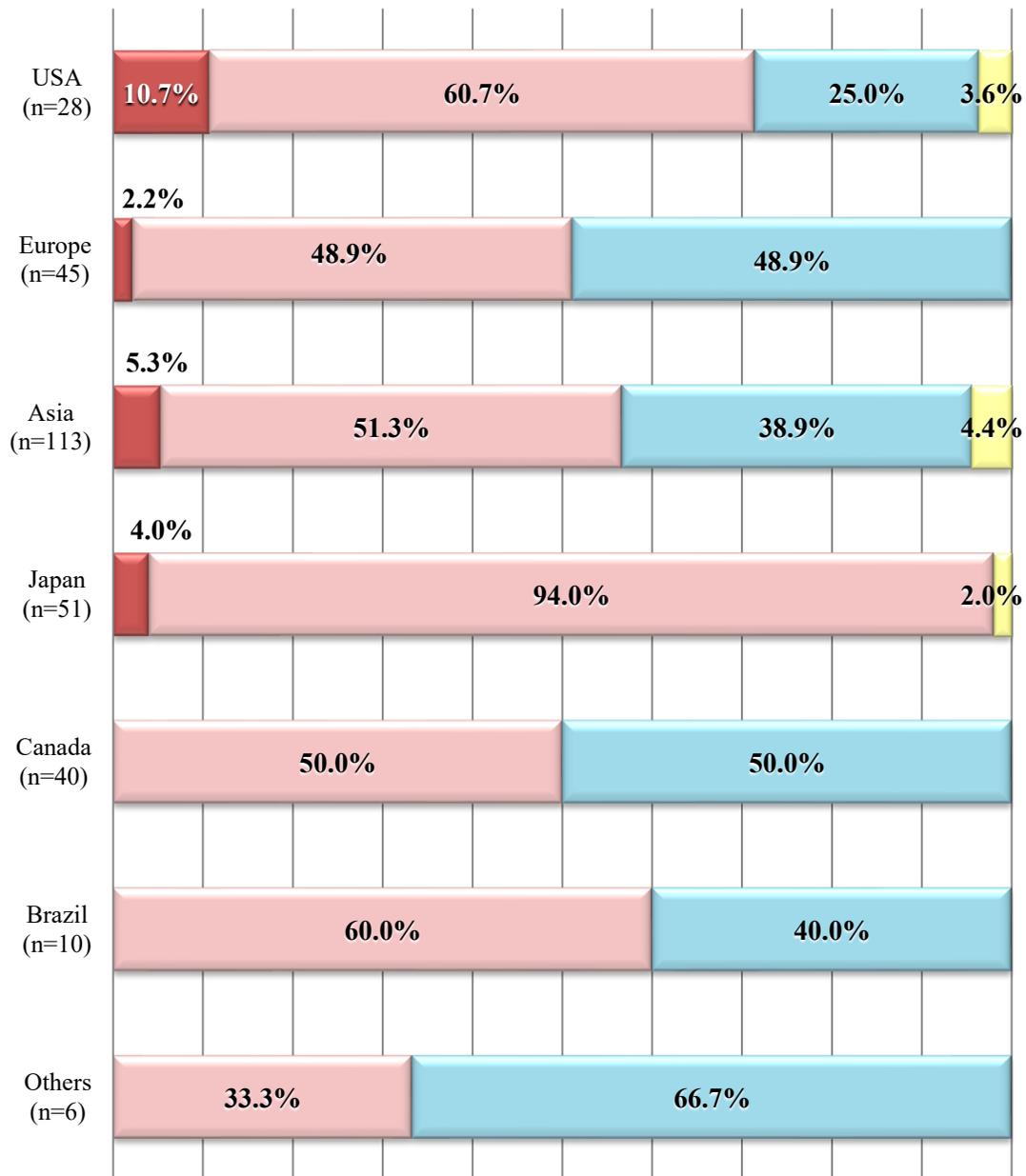
## Question 11: How should US allies respond to the US?

When asked how US allies should respond to the new US National Security Strategy, 56.9% of experts globally answered that countries should maintain their alliances with the US, but should develop more autonomous national security strategies. The next more popular response at 38.5% was that countries should rethink their alliances and reduce dependence on the US. When viewing the results by region, these responses were supported equally in Europe and Canada. This contrasts with Japan, where 94% of respondents selected the former option of maintaining the alliance but with greater autonomy, highlighting that in Japan, the alliance itself seems to be of higher priority.



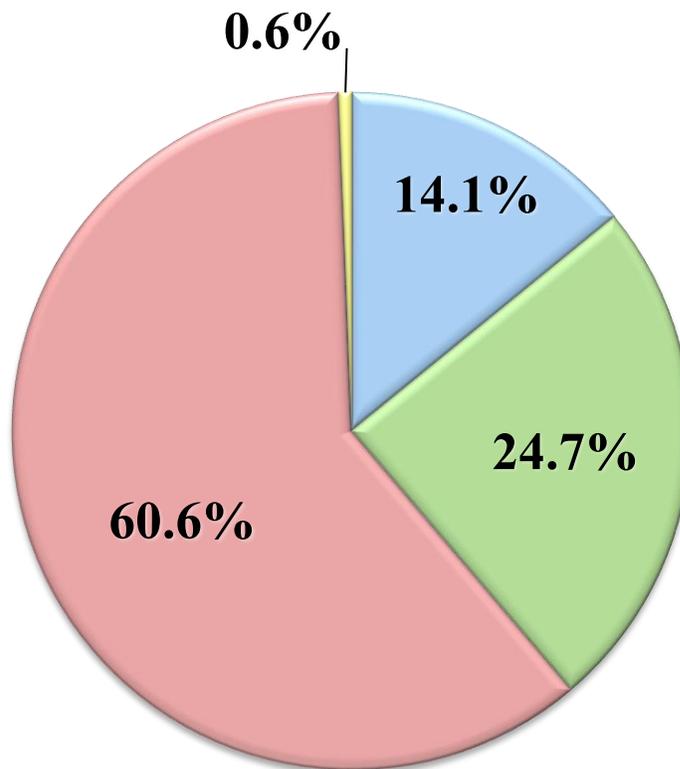
## Results by Country/Region

- Allied countries should enhance their own defensive capabilities in cooperation with the US in order to better respond to the US strategy.
- Countries should maintain their alliances with the US, but should develop more autonomous own national security strategies.
- Countries should rethink their alliances with the US and direct efforts towards diplomatic and national security initiatives that do not depend on the US.
- Unsure at this juncture



## Question 12: Is the “peace through power” stance acceptable?

A majority of experts (60.6%) believe that it is unacceptable for the major powers to engage in military operations with the purported goal of maintaining their spheres of influence or increasing their security, and that “regardless of purpose, such actions undermine international law.” Even with the power-based order growing in scope, the majority of respondents still believe that the principles of international law should be prioritized.

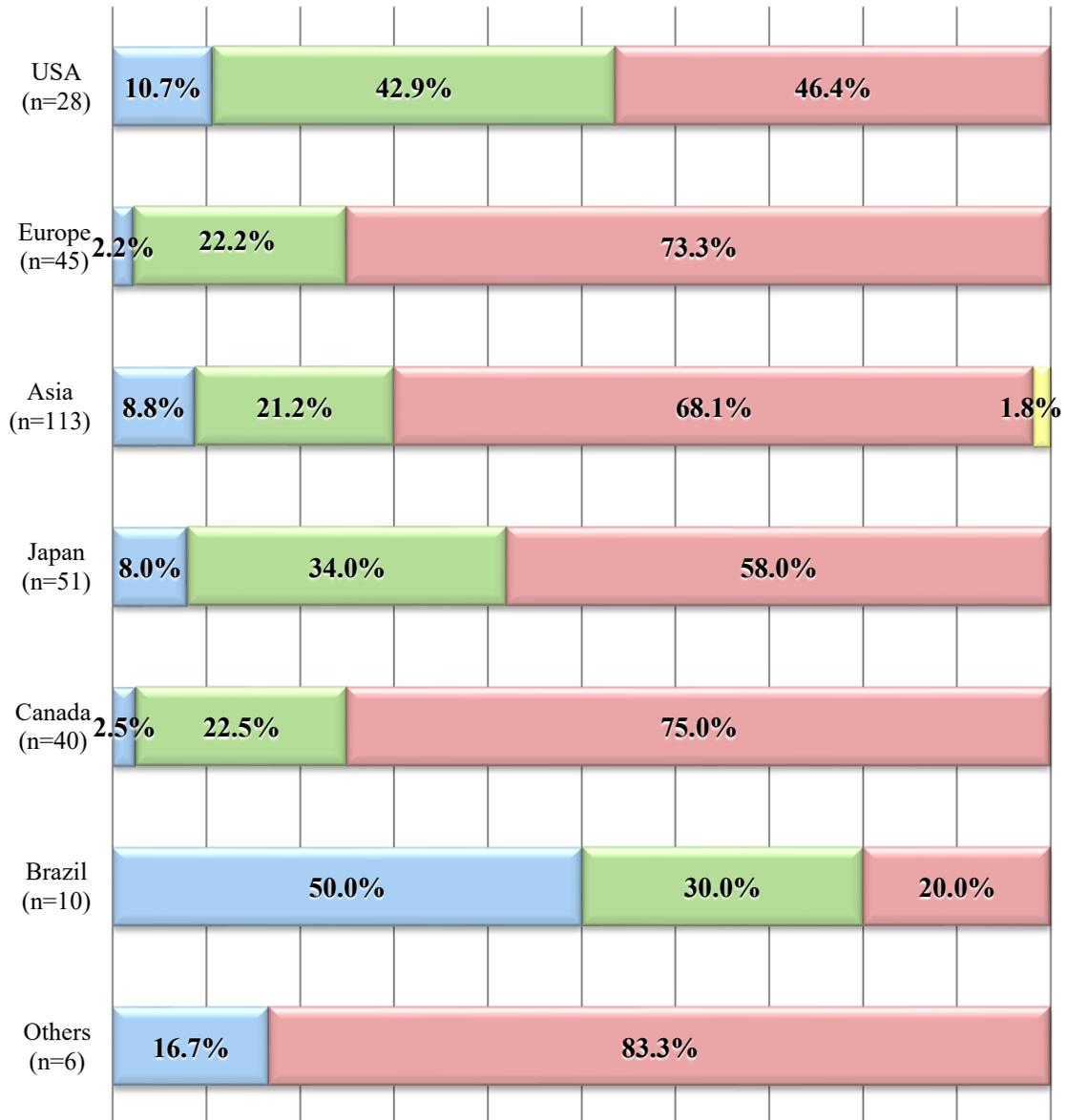


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- They may be acceptable under certain conditions in order to maintain international stability and regional order.
- Certain circumstances may make such actions understandable, but caution should be taken when attempting to justify them.
- Such actions undermine international law and the international order, and are unacceptable under any circumstances.
- Unsure at this juncture

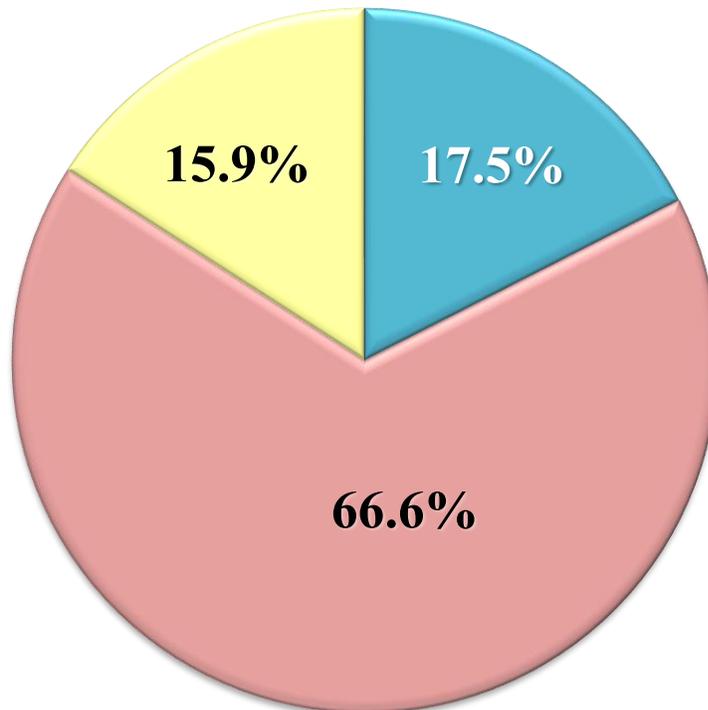
## Results by Country/Region

- They may be acceptable under certain conditions in order to maintain international stability and regional order.
- Certain circumstances may make such actions understandable, but caution should be taken when attempting to justify them.
- Such actions undermine international law and the international order, and are unacceptable under any circumstances.
- Unsure at this juncture



## Question 13: AI development and international governance

AI is already deeply incorporated into national decision-making, but there has been little movement in risk management or the development of international rules. Only 17.5% of experts believe that rapidly-advancing AI technologies can be integrated into the global governance framework, and 66.6 % are concerned that unregulated competition and increased division are likely without adequate governance.

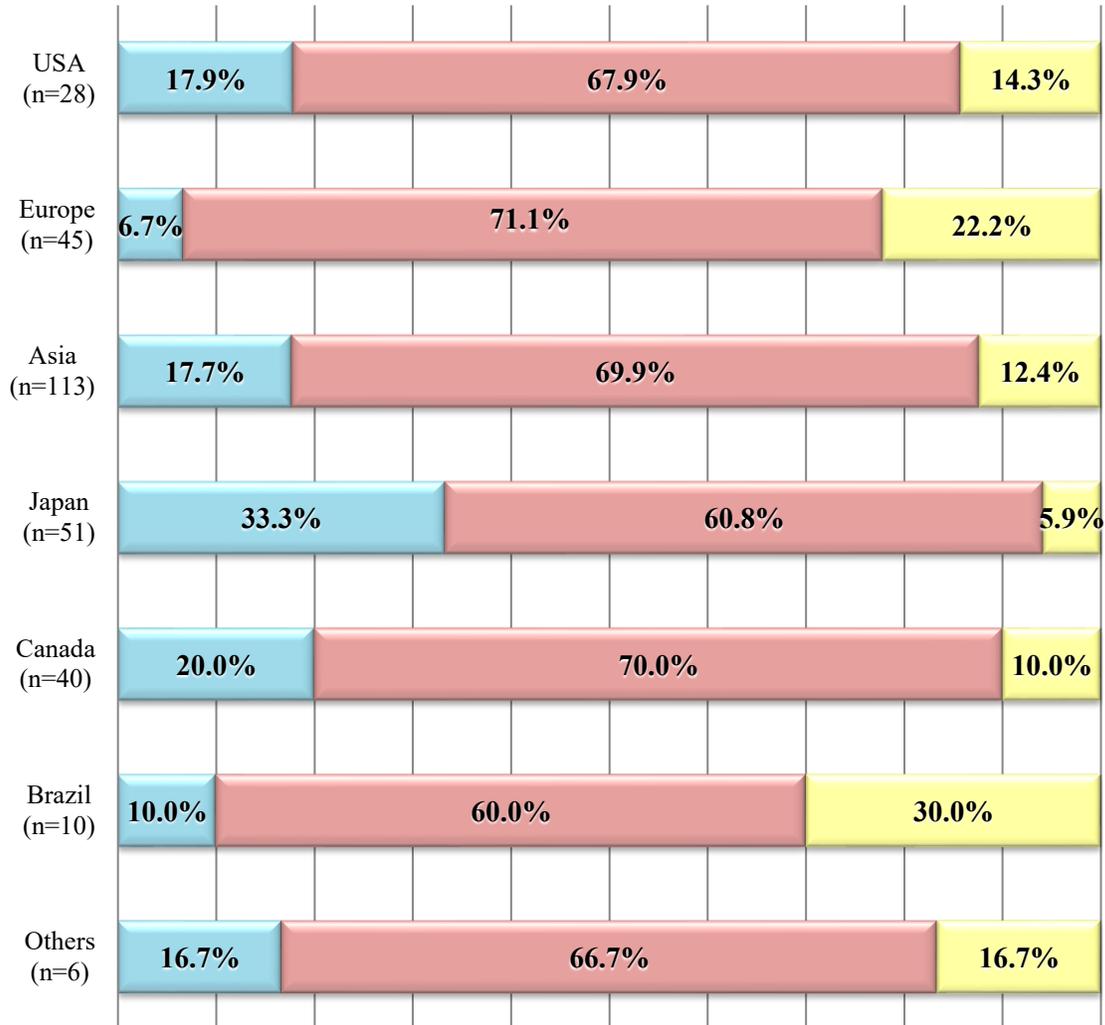


2026 n=293

- It's still possible.
- There is a high potential for unregulated competition and increased division without adequate governance in place.
- Unsure at this juncture

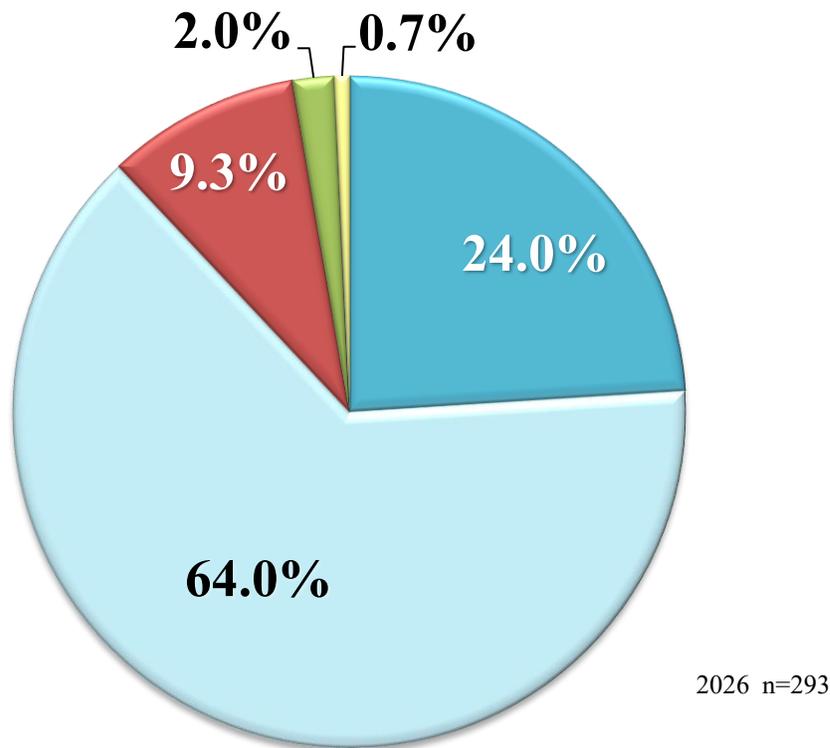
## Results by Country/Region

- It's still possible.
- There is a high potential for unregulated competition and increased division without adequate governance in place.
- Unsure at this juncture



## Question 14: Roles for middle powers in a major-power-dominated order

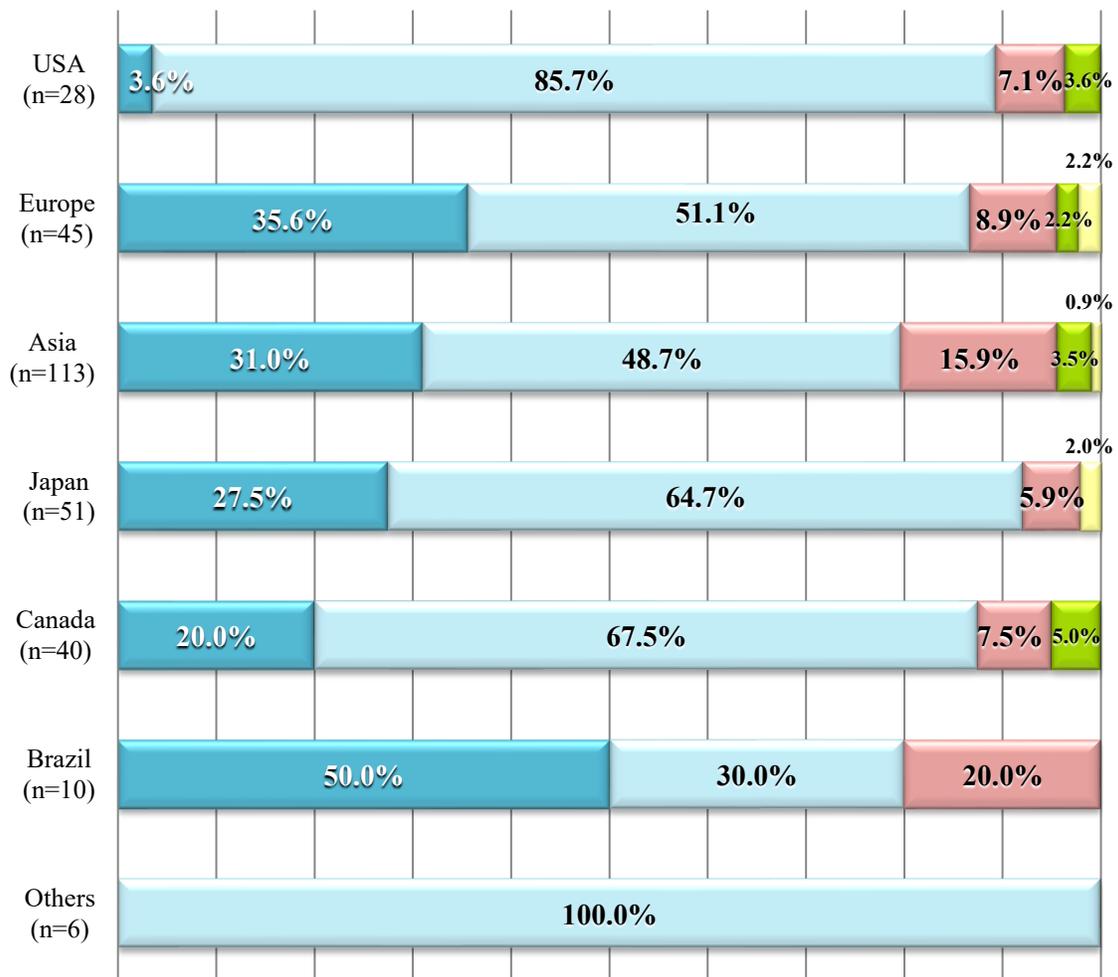
With the world currently dominated by the major powers, experts were asked what roles can be played by the world's middle powers. In response, 64.0% answered that while it will be difficult to prevent change overall, the middle powers can play a restraining role in dealing with certain issues and regions. Moreover, 24% believe that the middle powers can play a central role in maintaining the LIO if they work together. In total, almost 90% of respondents believe that the middle powers will have some role to play in maintaining the LIO.



- The middle powers can work together to produce a driving force that will maintain the LIO.
- It will be difficult to prevent change overall, but the middle powers can play a restraining role in dealing with certain issues and regions.
- The middle powers have little effective influence, and in practical terms, their decisions will be swayed by the major powers.
- Other
- Unsure at this juncture

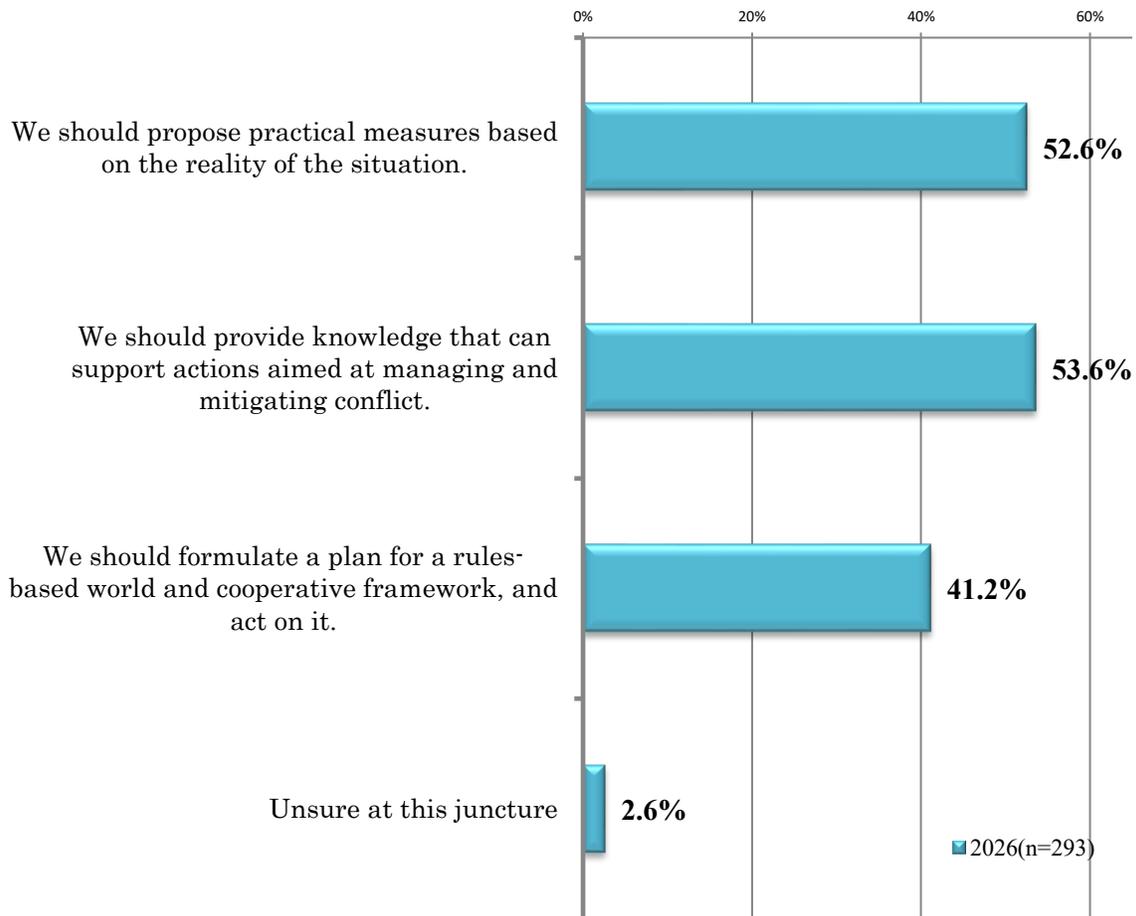
## Results by Country/Region

- The middle powers can work together to produce a driving force that will maintain the LIO.
- It will be difficult to prevent change overall, but the middle powers can play a restraining role in dealing with certain issues and regions.
- The middle powers have little effective influence, and in practical terms, their decisions will be swayed by the major powers.
- Other
- Unsure at this juncture



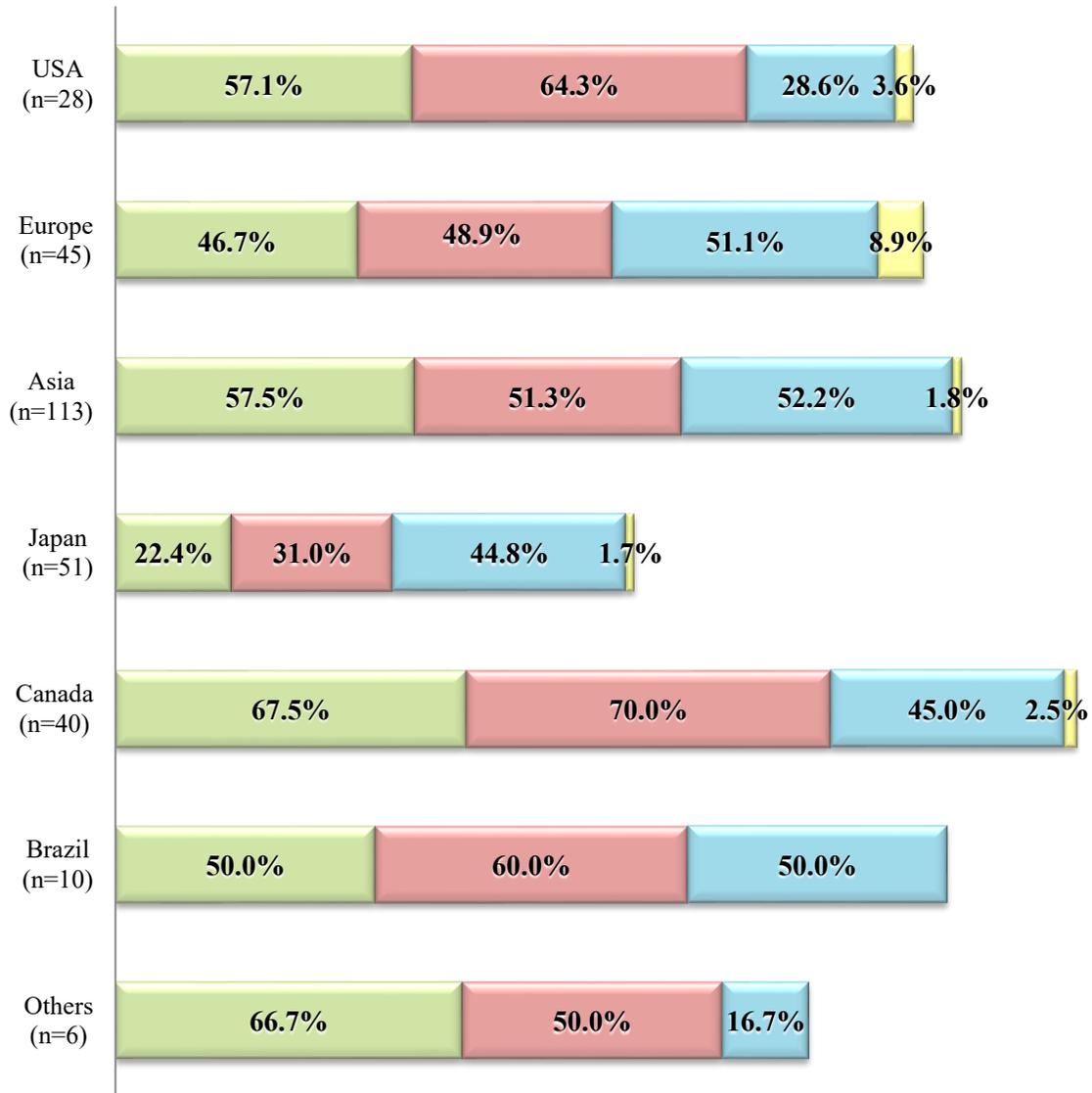
## Question 15: What role for experts within a “power-based order”?

As the major powers continue to use coercion and engage in “peace through power,” experts around the world believe that they can provide governments with knowledge that can management and mitigate conflict (53.6%) and can propose practical measures for dealing with the reality of situations faced (52.6%). Just under half (41.2%) also believe that experts can be involved in the formulation of a rules-based framework for the world.



## Results by Country/Region

- We should propose practical measures based on the reality of the situation.
- We should provide knowledge that can support actions aimed at managing and mitigating conflict.
- We should formulate a plan for a rules-based world and cooperative framework, and act on it.
- Unsure at this juncture



## Summary of the Survey Results

This survey was conducted in cooperation with 36 think tanks representing countries and regions in the Americas, Europe, and Asia, with a central role being played by the 12 think tanks involved in the running of the Tokyo Conference. A total of 293 experts from 26 countries took part, allowing us to tap into a wealth of knowledge and expertise in the fields of international politics, security, and global economics.

The survey was conducted between 23 January and 23 February 2026. The number of participating experts from each country/region was as follows: 28 experts from the US, 85 from Europe and Canada, 51 from Japan, 113 from the rest of Asia, 10 from Brazil, and 6 from other regions.

This survey was implemented with the cooperation of the twelve think tanks participating in the Tokyo Conference, as well as a number of other institutions, including Pacific Forum, Centro Studi di Politica Internazionale (CeSPI), Centre for European Policy Studies (CEPS), Stratbase, Merdeka Center, Institute of Strategic & International Studies (ISIS), Universiti Malaya, and Institute for Economics and Peace (IEP).