



A World Hedging Its Bets:

Findings from the 2026 IIFA Expert Survey on Global Affairs

October 2026

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About the Indonesian Institute for Foreign Affairs (IIFA)

The Indonesian Institute for Foreign Affairs (IIFA) is a national policy institute based at Universitas Islam Internasional Indonesia (UIII). Committed to advancing Indonesia's strategic presence in global diplomacy and international economic policy, IIFA provides a platform for informed analysis, global cooperation, and inclusive diplomacy. At a time when shifting global power dynamics demand thoughtful engagement, IIFA serves as a bridge between Indonesia and the world, amplifying the country's voice in shaping equitable, sustainable, and rules-based global governance.

The images on the front and back cover of this report are representing the new world map that was adapted by the United Nation General Assembly session on September 4th, 2026.

Executive Summary

The Indonesian Institute for Foreign Affairs (IIFA) invited global scholars to take part in the first annual IIFA Expert Survey on Global Affairs. IIFA is a think tank based at Universitas Islam International Indonesia (UIII), dedicated to dialogue on global affairs, geopolitics, and international cooperation. UIII is an international graduate university in Depok, West Java, established by the Government of Indonesia. We are currently hosting MA and Ph.D. students coming from approximately 50 countries.

The aim of the survey is to capture how global experts assess the direction of world affairs over the coming years, which include foreign-policy priorities, economic-security risks, the role and reform of multilateral institutions, major-power competition, and the regional flashpoints that will shape the period ahead.

To do this, we are gathering professional judgment of groups of diplomats, international organization practitioners, academics, think-tank researchers, senior policy experts, private sectors and non-governmental organizations from across the globe. The responses are analyzed only in aggregate, and no individual attribution is made. The survey comprises 47 questions and takes approximately 15 to 20 minutes to complete. The emails to the would-be respondents were sent out on June 22nd, 2026. The initial due date for response was set on 10 July 2026, but it was extended to 31 July 2026.

This report provides a narrative companion to the descriptive statistics report from the 2026 IIFA Expert Survey on Global Affairs. The report summarizes what the data show with specific figures and notes any features of the distribution worth flagging. A concluding section then provides narratives that draw

together patterns that recur across multiple figures produced from the descriptive statistics.

This report presents descriptive findings from the 2026 IIFA Expert Survey on Global Affairs, a 47-question survey of 151 global foreign-policy experts administered between June and July 2026. Respondents are drawn overwhelmingly from research and analytical roles: 85.5% work in academic or think-tank settings, 78.1% hold a doctorate, and 82.1% report more than a decade of professional experience. The panel therefore reflects expert assessment rather than the views of a general public or of sitting policymakers, and every finding in this report should be read on those terms.

Three patterns recur across nearly every section of the survey and organize the discussion that follows. First, this panel holds a strongly realist worldview: 88.7% agree that security drives state behavior more than rules, while only 38.0% agreement that international rules meaningfully constrain states. This same skepticism toward rules-based institutions surfaces independently in the low importance rating given to the United Nations (41.4%, versus 67.4% for the Asian Development Bank) and in the UN's last-place rating among governance channels for managing the Middle East conflict specifically (43.7%, versus 75.5% for direct major-power diplomacy).

Second, and organizing this report's central argument, respondents divide sharply along the income level of the country they work in. High-income-country respondents are more likely to prioritize preventing major war (37% versus 10% for middle/low income, see Figure B3) and to describe their region as leaning toward the U.S. (51% versus 14%, see Figure F1b); middle- and low-income-country respondents are more likely to prioritize strategic autonomy (42% versus 26%) and to describe their region as hedging (55% versus 30%, F1b).

Third, energy-market disruption emerges independently, in different sections of the survey, as the primary channel through which respondents expect geopolitical risk to translate into economic harm - the top-rated risk in the general risk battery (66% top-quartile) and the top-cited risk specific to the Middle East conflict (75.5%).

The central story of this survey is not any single opinion but the divergence between these two groups. It follows a consistent logic across the report, which are a) respondents coming from high-income countries describe a more U.S.-aligned, war-prevention-focused world; b) middle- and low-income countries respondents describe a hedging world organized around strategic autonomy. Both groups share the same realist baseline, but middle- and low-income respondents apply it more skeptically to existing institutions. This report treats that divergence - an expert consensus that, on closer inspection, is not a consensus at all - as its organizing frame, and the sections below are introduced accordingly.

A related and more forward-looking finding is that hedging is becoming this panel's default expectation, not just its current description: 40.4% describe their region's present posture as hedging or multi-aligned (Figure F1a), and this rises to 49.0% - essentially half the sample - when respondents are asked to forecast five years ahead (Figure H1).

A methodological note on the subgroup comparisons that recur throughout this report: high-income country respondents (n=89) and middle/low-income country respondents (n=62) are compared throughout on percentage-point gaps. The wider gaps reported here - such as the 37-point gap on regional alignment towards the US (Figure F1b) - are large relative to the sample sizes involved and are unlikely to be due to chance.

Meanwhile, narrower gaps, such as the seven-point gap on trans-Atlantic rupture (Figure H3), should be read more cautiously pending formal significance testing, which is not yet included in this report. Similarly, where a figure's base excludes "Not sure" or non-response (as noted for Figure E1), this is flagged in the relevant section rather than assumed to apply uniformly across figures.

The report proceeds in nine substantive sections - Scope and Limitations of the Panel, Foreign Policy Goals, Economic Security Risk, Multilateral Institutions, Trust in Other States, U.S.-China Competition, Middle East Conflict, Institutional Reform Experiment, and Forecasts and Worldview - followed by further analysis and a concluding narrative that synthesizes the three patterns above in full.



A. Scope and Limitations of the Panel

Before turning to substantive findings, this section sets out who answered the survey and what that composition means for how every subsequent finding should be read. The panel is concentrated in academic and think-tank roles, is heavily credentialed, and splits along a two-way World Bank income classification used as the primary subgroup comparison throughout this report. That “middle/low-income” category is itself heterogeneous - it spans countries as different as Indonesia (upper-middle income) and Malawi, the panel's only low-income respondent - a composition worth keeping in mind at every later reference to “high-income” or “middle/low-income” respondents.

A1. Income level of country of work

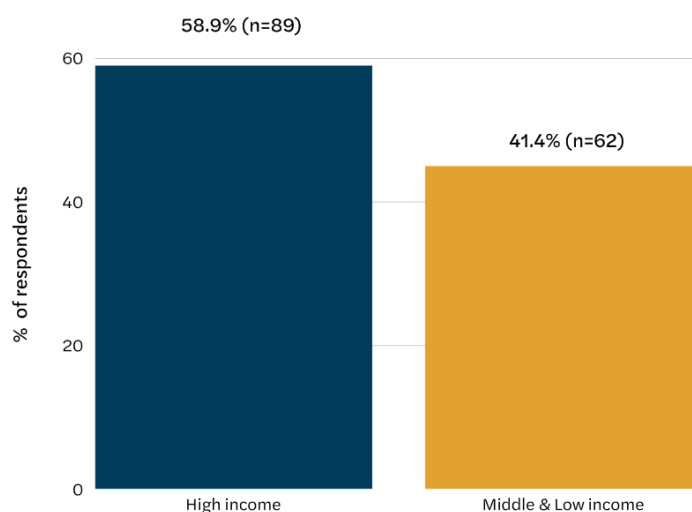


Figure A1. Distribution of Respondents by Income Level of Country of Work

Figure A1 reports the World Bank income classification of the country each respondent works in, the variable used throughout the report to compare subgroups. High-income countries account for 58.9% of the 151 respondents (n=89), against 41.1% (n=62) for a combined middle- and low-income group.

The report collapses four World Bank tiers into this two-way split because only a single respondent (from Malawi) falls into the low-income category on its own, making a four-way breakdown statistically unworkable.

The appendix detail behind this figure shows the middle/low-income group is not evenly spread. Indonesia alone contributes 26 of the 62 respondents in that band, followed by Malaysia (7), China (5), and a long tail of single-digit country counts.

The high-income group is similarly concentrated, led by the United States (24), Australia (12), and Singapore (10). In practice, this means the "middle & low income" comparison group used throughout the report is disproportionately an Indonesian perspective, and the "high income" group is disproportionately American, Australian, and Singaporean - a composition worth keeping in mind whenever the report attributes a view to one income group or the other.

A2. Professional role

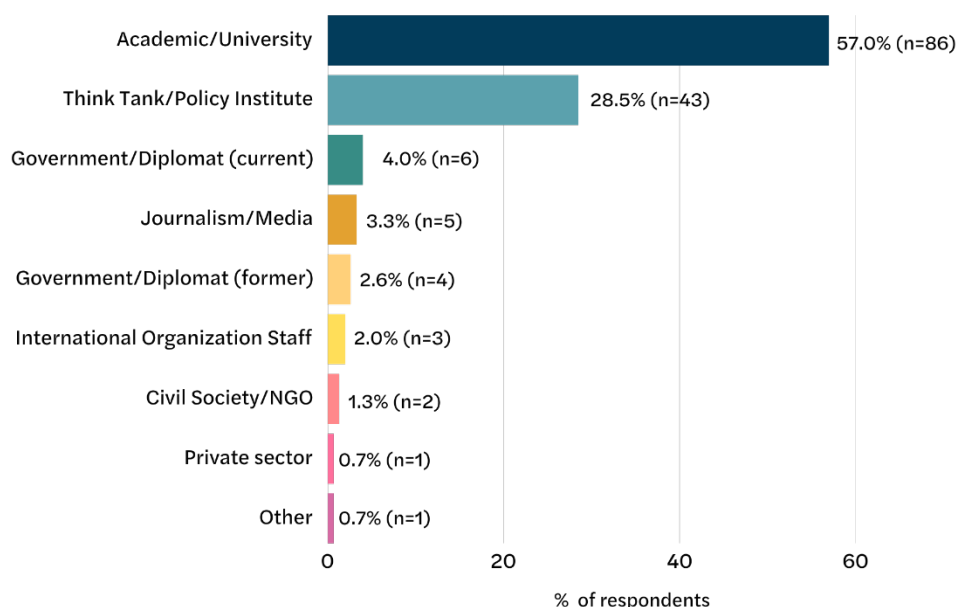


Figure A2. Distribution of Respondents by Professional Role

Figure A2 shows the professional background of respondents. Academics and university-affiliated experts make up 57.0% of the sample (n=86) and think tank or policy institute staff add a further 28.5% (n=43) - together, 85.5% of respondents come from research or analytical roles rather than from policymaking positions.

Current and former government or diplomatic officials combine for only 6.6% (n=10 of 151), and international organization staff add another 2.0% (n=3), so government-adjacent practitioners are a small minority of the panel.

The remaining roles - journalism/media (3.3%), civil society/NGO (1.3%), private sector (0.7%), and other (0.7%) - are each represented by only one or two respondents. This composition matters for how every other finding in the report should be read: this is overwhelmingly a survey of scholars and analysts who study foreign policy, not a survey of the officials who make it, so its findings are best understood as expert assessment rather than as a signal of government positioning.

A3. Years of professional experience

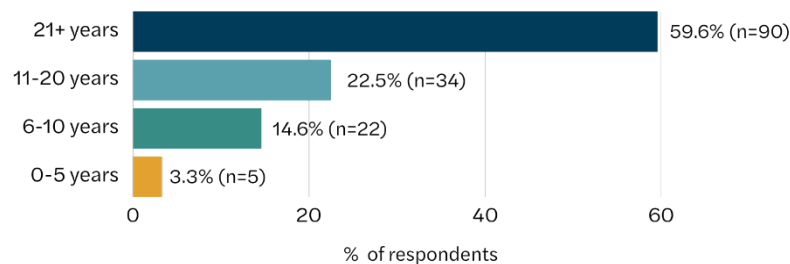


Figure A3. Distribution of Respondents by Years of professional experience

Figure A3 reports how long respondents have worked in their field. Fully 59.6% (n=90) report 21 or more years of experience, and a further 22.5% (n=34) report 11-20 years, meaning 82.1% of the panel has more than a decade of professional experience. Only 3.3% (n=5) are early-career respondents with five years or less.

Combined with the education figure (I1) and age figure (I4) elsewhere in this section, this confirms the panel is a senior, veteran group rather than a broad cross-section of the field: opinions recorded in this survey reflect the views of established experts who have observed multiple cycles of the international issues covered in later sections, rather than the views of younger generation of entrants to the profession.

A4. Issue areas worked on most

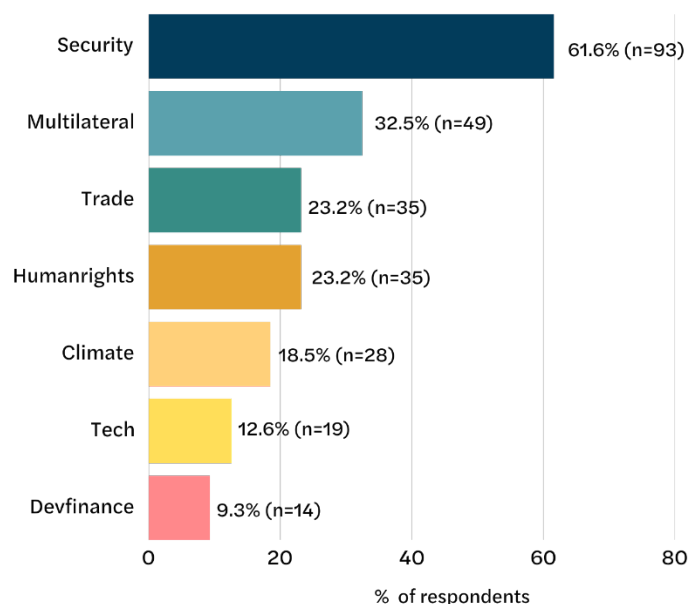


Figure A4. Distribution of Respondents by Issue areas worked on most

Figure A4 above shows the issue areas respondents work on most, with multiple selections allowed against the full base of 151 respondents. Security and defense is the most selected area, chosen by 61.6% (n=93) - well ahead of multilateral institutions (32.5%, n=49), trade and investment (23.2%, n=35), and human rights/humanitarian affairs (tied at 23.2%, n=35). Climate/energy transition (18.5%, n=28), technology/digital governance (12.6%, n=19), and development finance (9.3%, n=14) are the least-selected categories.

Because respondents could select more than one area, these percentages do not sum to 100%, but the ranking is informative: security expertise dominates the panel's collective background by a wide margin. This is consistent with, and likely helps explain, the heavy emphasis the substantive sections of the survey place on conflict, risk, and great-power competition - topics like the Middle East conflict and U.S.-China rivalry sections draw on a respondent pool that is disproportionately versed in security affairs rather than, for instance, development finance or technology governance.

A5. Highest education

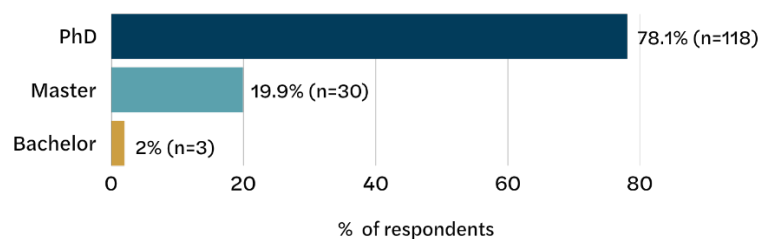


Figure A5. Distribution of Respondents by Highest Education

Figure A5 reports the highest degree held by respondents. PhD holders make up 78.1% of the sample (n=118), with master's degree holders adding 19.9% (n=30) and bachelor's degree holders just 2.0% (n=3). Combined with the professional-role figure (A1), which showed 85.5% of respondents work in academic or think-tank settings, this confirms the panel is an extremely credentialed one: nearly four in five respondents hold a doctorate.

This level of academic credentialing is a further reason to read the survey's findings as expert opinion grounded in research training. It also means the survey's later findings on complex technical topics - risk probabilities, institutional design, geopolitical forecasting - are being generated by a population well equipped to reason about them in structured terms, which is worth bearing in mind when weighing the confidence of the aggregate patterns discussed in the concluding section.

A6. Gender

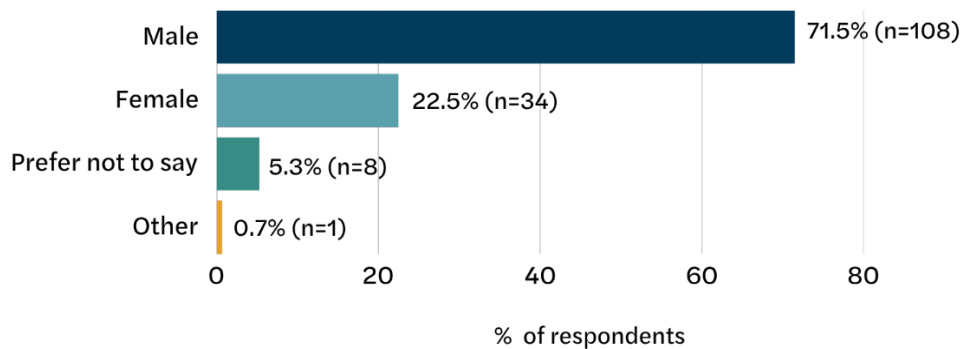


Figure A6. Distribution of Respondents by Gender

Figure A6 informs the gender composition of the sample. Male respondents make up 71.5% (n=108) and female respondents 22.5% (n=34), with 5.3% (n=8) preferring not to say and 0.7% (n=1) selecting another category. The resulting ratio among those who disclosed a binary gender is roughly three men for every one woman respondent.

A7. Age group

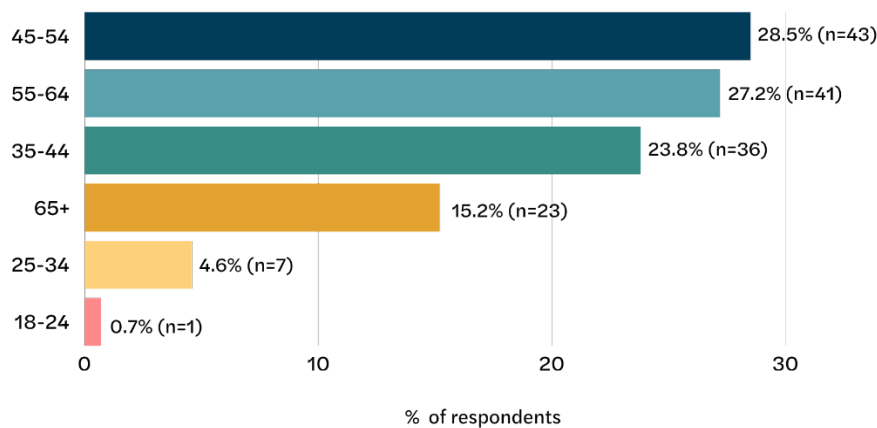


Figure A7. Distribution of Respondents by Age Group

Figure A7 shows the age distribution of respondents. The three middle-to-upper brackets dominate: 45-54 years old account for 28.5% (n=43), 55-64 for 27.2% (n=41), and 35-44 for 23.8% (n=36) - together 79.5% of the sample. The 65+ bracket adds a further 15.2% (n=23), while respondents under 35 are a small minority: 25-34 year-olds are just 4.6% (n=7) and 18-24 year-olds a single respondent (0.7%).

This age profile lines up closely with the experience figure (A3), where 82.1% of respondents reported more than a decade in their field, and with the education figure (I1), where PhDs predominate - together these three demographic figures describe the same underlying

population from three angles: a senior, highly credentialed, and experience-heavy panel of experts, with only a thin representation of younger or early-career voices.

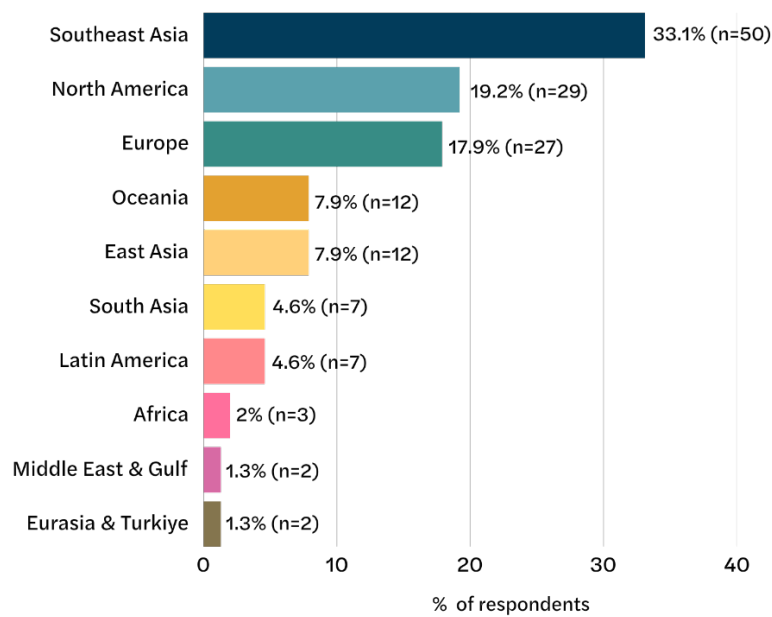


Figure A8. Distribution of Respondents by region of professional work

Figure A8 shows the geographical distributions of the respondents. Most of the respondents come from three regions, Southeast Asia being the dominant one, followed by North America and Europe.

Respondents in the second group are coming from South Asia and Latin America followed by the Middle East and Gulf, and Eurasia and Turkiye. In a simplified form, respondents are divided into two groups: those who are coming from the Western world, North America and Europe with 56 respondents in total, and those who are coming from the non-Western world with a total of 95 respondents.



B. Foreign Policy Goals

This section asks respondents to name their country's most and second-most important foreign policy goals over the next five years - the first of several places where the income-based divide introduced above begins to appear.

B1. Most important foreign policy goal

Question: Thinking about foreign policy over 10 years, how important should each goal be?

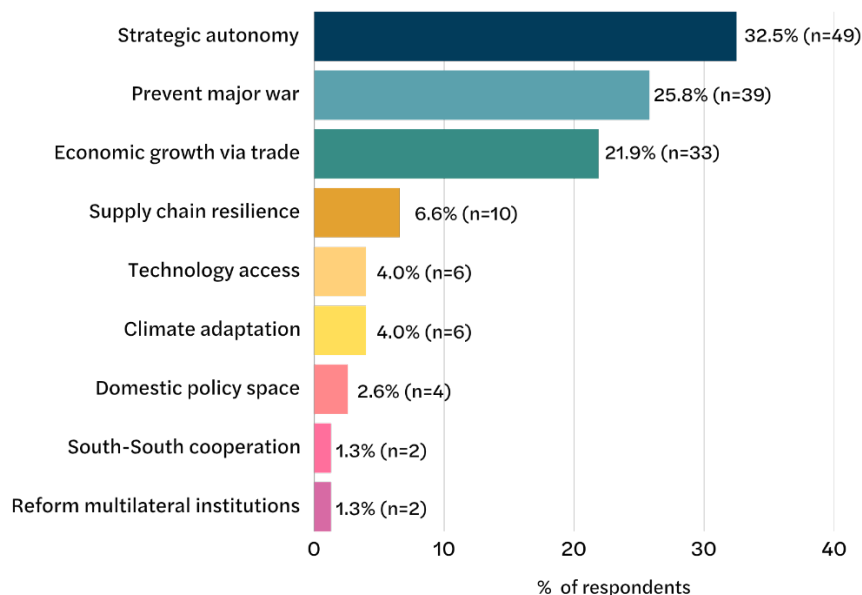


Figure B1. Respondents' Priorities in Foreign Policy Goals

Figure B1 shows respondents' top foreign policy priority for their country over the next five years (question B1, single choice among ten options). Strategic autonomy - avoiding overdependence on any single major power - is the most common first choice at 32.5% (n=49), followed by preventing major war and regional military escalation at 25.8% (n=39), and promoting economic growth through trade and investment at 21.9% (n=33).

Together these three goals account for 80.2% of all first-priority votes, leaving the remaining seven options - including reforming multilateral institutions (1.3%, n=2) and expanding South-South cooperation (1.3%, n=2) - to split the last fifth of responses.

The dominance of strategic autonomy and war prevention as top concerns, ahead of more transactional goals like trade or technology access, suggests this expert panel sees the international environment primarily through a lens of geopolitical risk management rather than economic opportunity-seeking, at least when forced to name a single first priority.

B2. Second most important foreign policy goal

Question: Thinking about foreign policy over 10 years, how important should each goal be?

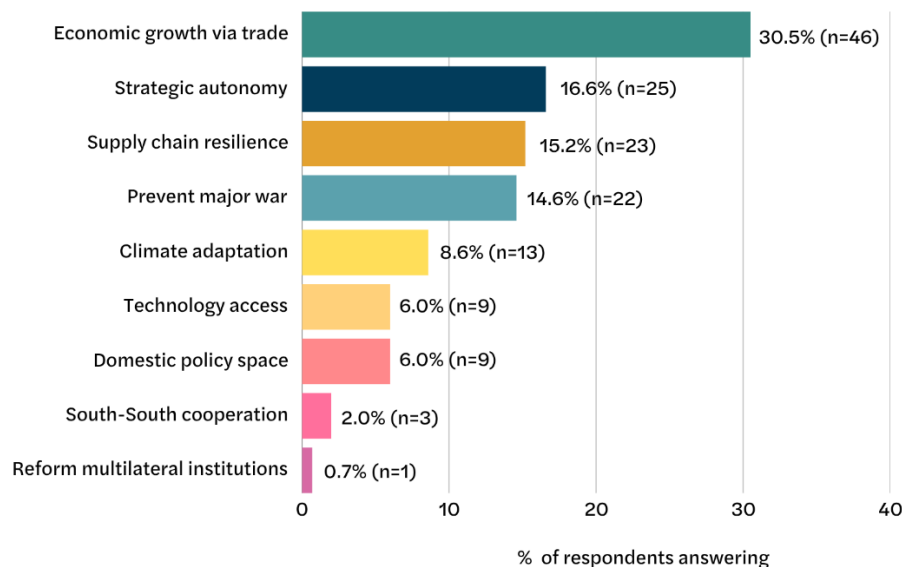


Figure B2. Respondents' Secondary Priorities in Foreign Policy Goals

Figure B2 reports respondents' second-priority foreign policy goal (question B2), asked immediately after B1 using the same ten options. Economic growth through trade, investment, and market access is the clear leader at 30.5% (n=46), followed by strategic autonomy (16.6%, n=25), supply chain resilience (15.2%, n=23), and preventing major war (14.6%, n=22).

The shift is notable when compared with the B1 results: economic growth via trade rises from the third-ranked first-priority (21.9%) to the top-ranked second priority (30.5%), while strategic autonomy and war prevention both fall back once trade is allowed to compete for a choice.

Read together, B1 and B2 suggest respondents treat security-oriented goals - autonomy, war prevention - as the more urgent first-order concern but see economic growth through trade as a close and broadly shared second-order priority almost regardless of what they name first.

B3. Most important foreign policy goal, by country income level

Question: Thinking about foreign policy over 10 years, how important should each goal be?

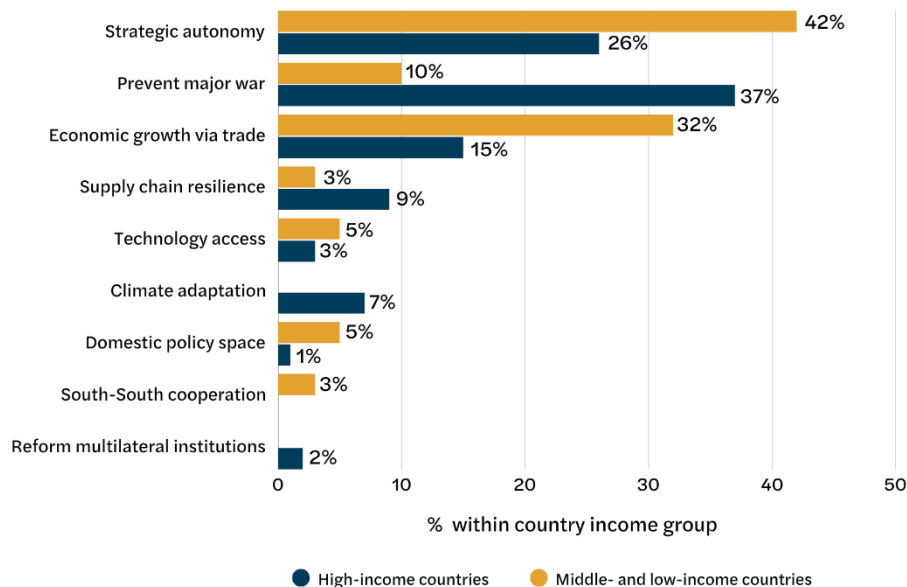


Figure B3. Most Important Foreign Policy Goal by Country Income Level

Figure B3 splits the B1 top-priority results by respondents' country income group and reveals the sharpest divide in the foreign-policy-goals section. Respondents from middle- and low-income countries pick strategic autonomy far more often (42%) than high-income respondents (26%) and lean more heavily toward economic growth via trade (32% versus 15%).

Respondents from high-income countries, by contrast, are much more likely to name preventing major war as their top priority (37% versus just 10% for middle/low income) - a nearly four-fold gap. Supply chain resilience follows the same high-income lean (9% versus 3%).

This pattern is consistent with a reading in which respondents from middle- and lower-income countries prioritize economic development and freedom of maneuver from major powers. Meanwhile respondents from wealthier countries, often more security-exposed states, prioritize avoiding great-power military conflict. This income-based split recurs across several later sections of the report and is addressed further in the concluding section.

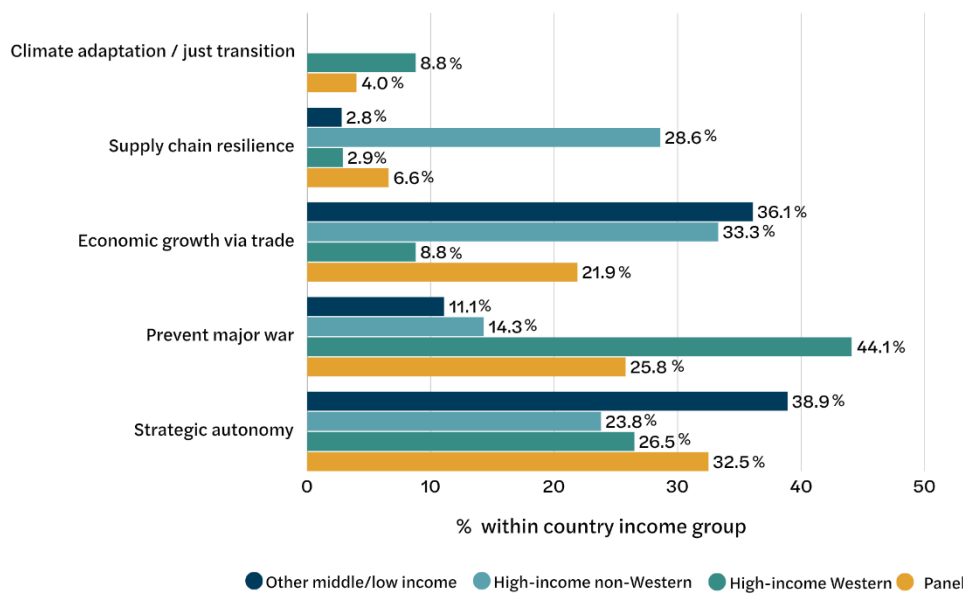
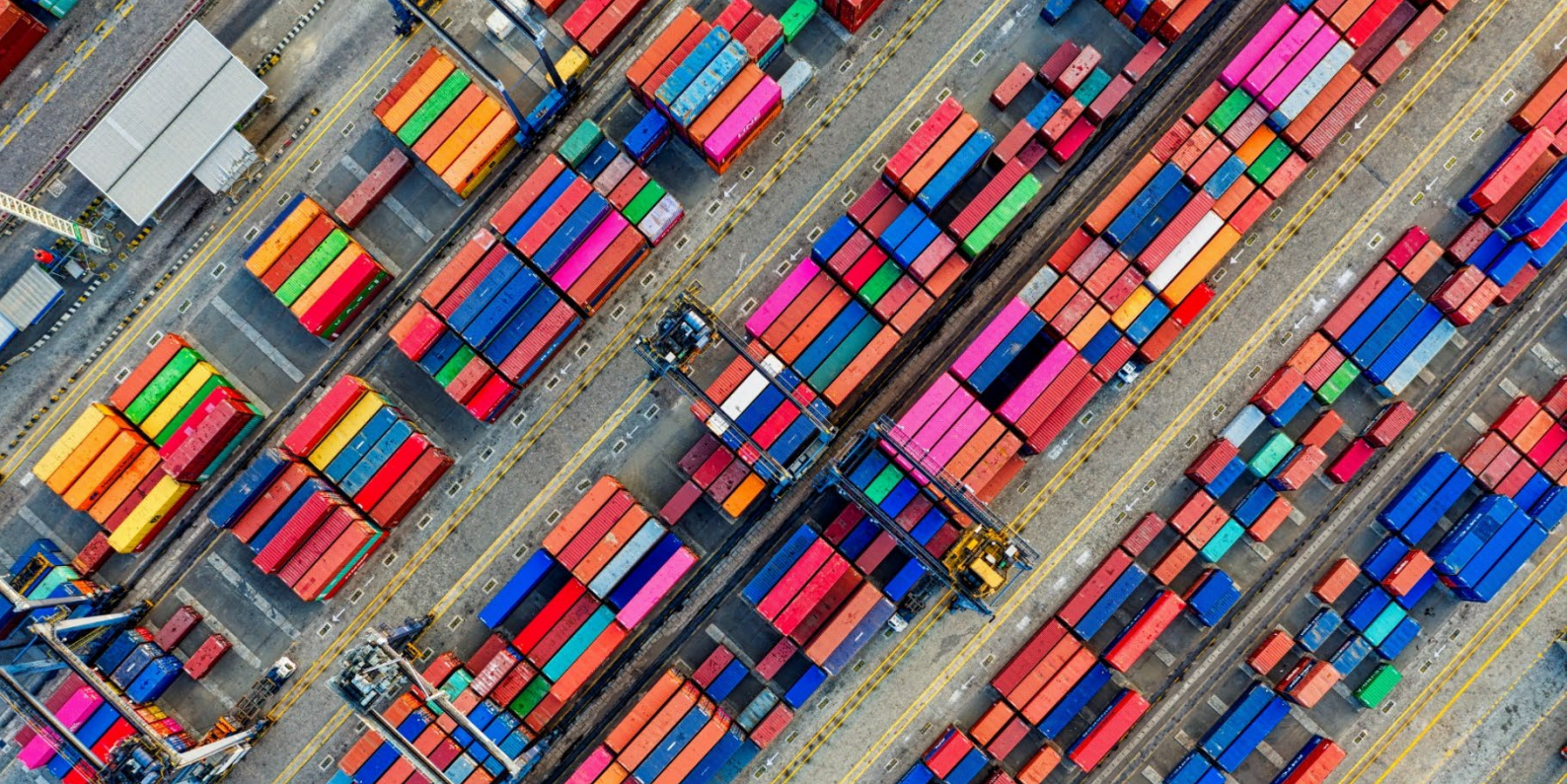


Figure B3a. Top foreign-policy goal, by bloc (per cent group)

Figure B3a above reveals the differences once the respondents are grouped into more detailed categories. Climate adaptation seems not to be considered as top foreign policy goal by respondents coming from middle/low-income countries. Meanwhile, this group of respondents emphasizes strategic autonomy as their top foreign policy goal, something that in contrary not much of a preference by respondents coming from both of Western and non-Western high-income countries.

Similar pattern of contrasting preference can also be seen on seeing preventing war as top foreign policy goal. Respondents coming from middle/low-income countries put much less emphasize on preventing major war (11%) compared to the respondents coming from high-income Western countries. Interestingly, high-income non-Western countries align more with the respondents from middle/low-income countries in this regard.



C. Economic Security Risk

The previous section established that this panel's foreign-policy priorities split along income lines between security-oriented and growth-oriented goals. This section tests a related question directly: which economic and geoeconomic risks does this panel consider most severe and most likely, and does the same income divide persist when the question shifts from stated priorities to risk perception?

C1. Perceived risk, grouped into quarters of the 0-10 scale

Question: Please assess risks over the next five years.

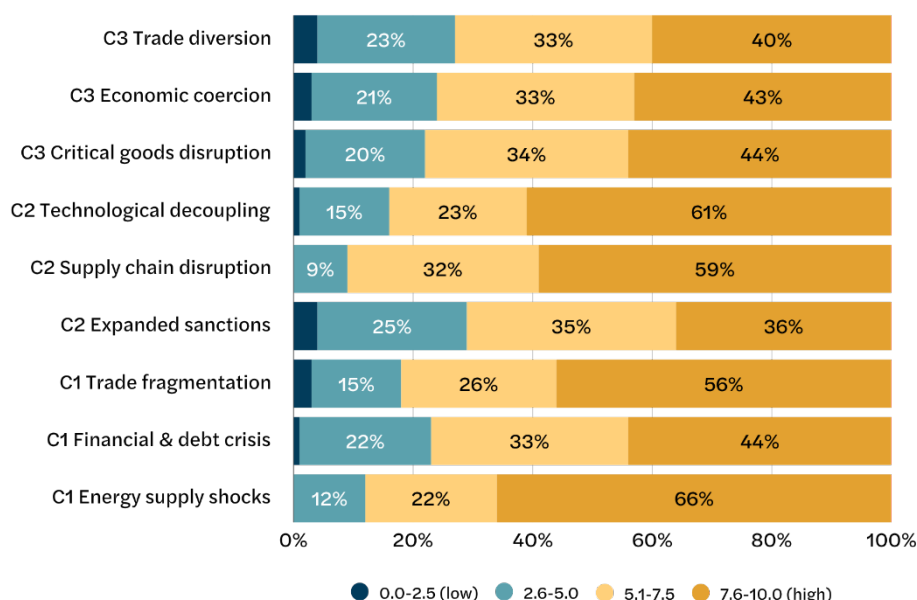


Figure C1. Distribution of Perceived Risk Ratings Across Risk Items

Figure C1 combines nine risk items from three questions (C1: global economic system risk; C2: geoeconomic and strategic risk; C3: national economic security vulnerability), each rated on a 0-10 scale and here grouped into quarters.

Energy supply shocks (C1) draw the highest top-quartile (7.6-10) rating as 66% of respondents think as such (high risk of energy supply shocks that is), followed by technological decoupling (C2) at 61%, supply chain disruption (C2) at 59%, and trade fragmentation (C1) at 56%.

At the other end, expanded sanctions regimes (C2) has the lowest top-quartile share as only 36%, of respondents think that there is a high risk of more expanded sanction regimes, although even this item still draws a combined 71% in the top two quarters.

Notably, the three C3 items - which ask about vulnerability specific to the respondent's own country rather than global risk in the abstract - cluster tightly together in the 40-44% top-quartile range, i.e. respondents thinking of high risk of the items to occur (economic coercion 43%, critical goods disruption 44%, trade diversion 40%), suggesting a fairly uniform sense of national exposure that is less extreme than the alarm expressed about global energy and technology risks specifically.

C2. Probability of global events within five years, in bands of 25%

Question: What is the probability each event will occur?

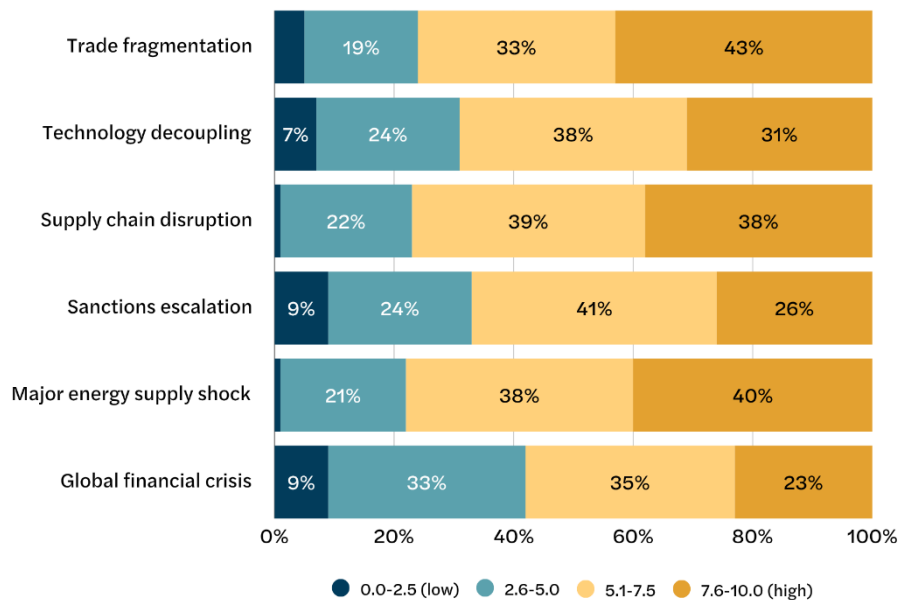


Figure C2. Probability of global events within five years

Figure C2 shows results from questions which asks respondents to estimate a 0-100% probability that each of six types of global events occurs within five years. The results here are grouped into 25-point bands. Trade fragmentation draws the highest top-band (high probability, 76-100% chance of occurring) estimate at 43%, followed closely by a major energy supply shock at 40% and supply chain disruption at 38%.

Only 23 percent of respondents think that global financial crisis is in the top-band (high probability, 76-100% chance of occurring), while 26 percent of respondents think that sanctions escalation is in the top-band category (high probability, 76-100% chance of occurring).

This ranking closely mirrors the C1-C3 severity-risk figure discussed above, where energy shocks and trade fragmentation also topped the list - the same relative ordering emerges whether respondents are asked to rate severity on a 0-10 risk scale or to estimate a numeric probability, which strengthens confidence that the underlying concern about energy and trade disruption is a stable feature of this panel's outlook rather than an artifact of question wording.

C3. Probability bands by country income level

Question: What is the probability each event will occur?

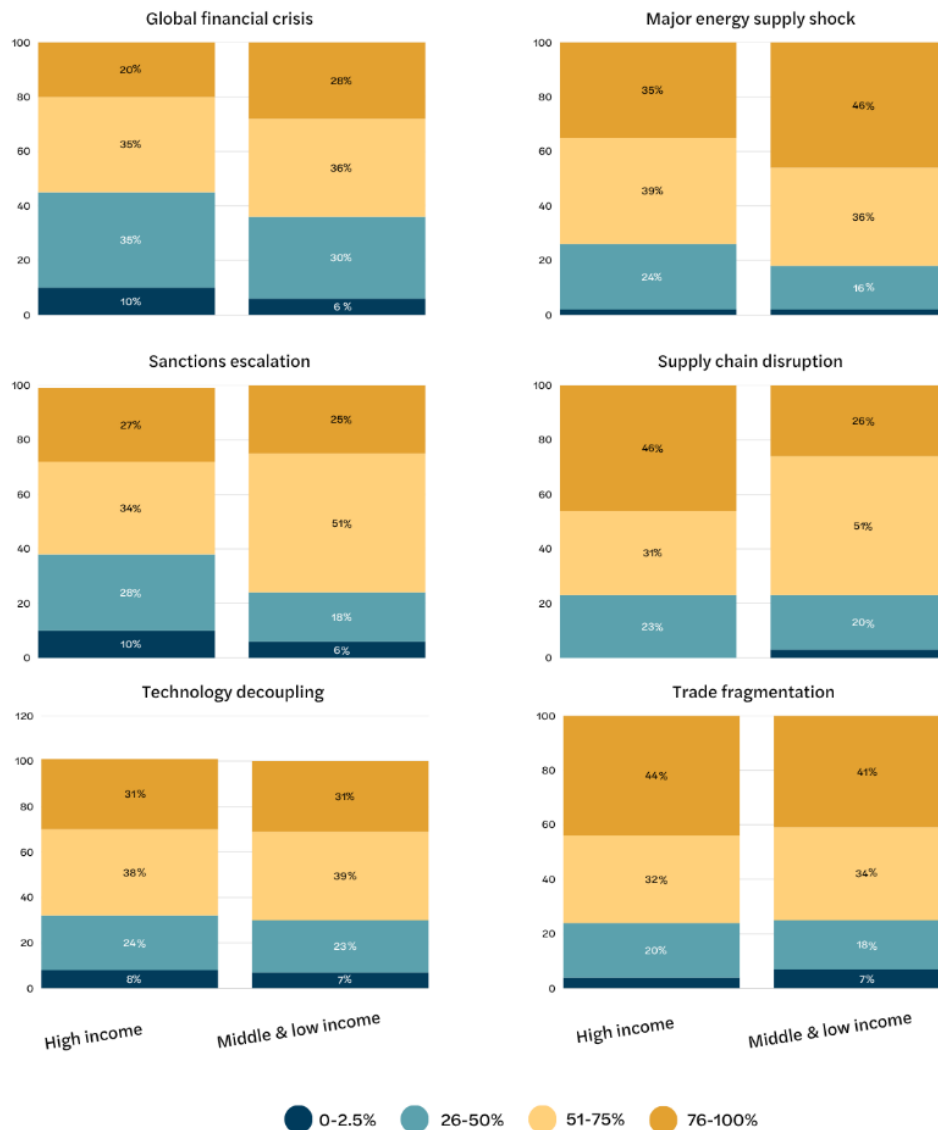


Figure C3. Probability bands by country income level

Figure C3 breaks the probability of six types of events items to occur by country income group. The clearest gaps appear on the items most tied to economic coercion: for a major energy supply shock, 46% of expert respondents from middle/low-income countries put the probability in the top band versus 35% of high-income respondents.

For sanctions escalation, the combined top-two-band share is 76% for middle/low income against 61% for high income.

Technology decoupling is the one item where the two groups align almost exactly (31% top band for both). Global financial crisis shows a smaller but consistent gap (28% middle/low versus 20% high income).

Taken together, respondents from middle- and low-income countries consistently assign higher probability to the economic-coercion-adjacent risks - sanctions and energy shocks - than their high-income counterparts do, a pattern that lines up with the stronger emphasis this same group placed on strategic autonomy as a top foreign policy goal in the B1 country income breakdown.



D. Multilateral Institutions

Sections on foreign-policy goals and economic risk showed a panel skeptical of institutional constraint and divided by country income level. This section asks respondents to rate the importance of eight multilateral institutions directly, providing the first direct test of the realist, institution-skeptical worldview that recurs throughout this report.

D1. Importance of multilateral institutions

Question: To what extent do you rate the importance of each of the institutions below?

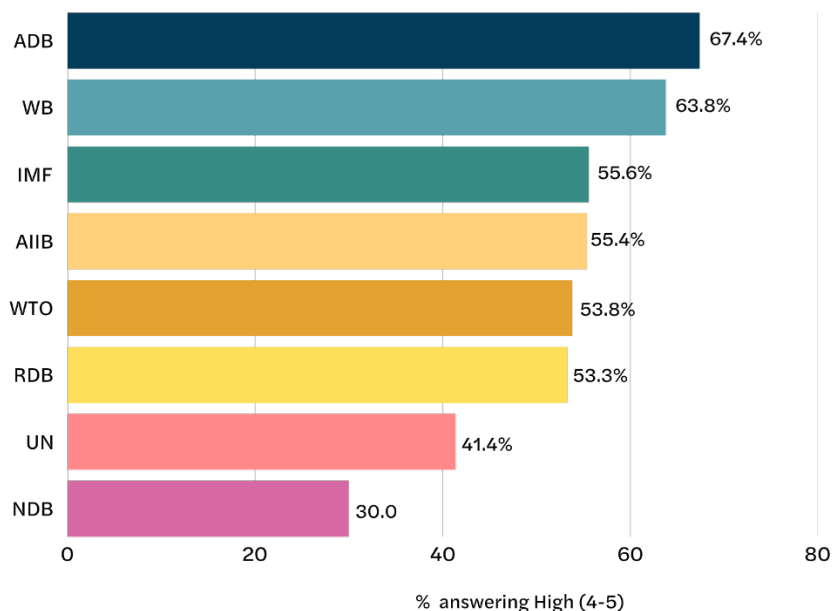


Figure D1. Importance of multilateral institutions

Figure D1 ranks eight multilateral institutions by the share of respondents rating their importance for developing-country economic development as High (4 or 5 on a 1-5 scale). The Asian Development Bank - ADB leads at 67.4%, followed by the World Bank (63.8%), IMF (55.6%), Asian Infrastructure Investment Bank - AIIB (55.4%), World Trade Organization - WTO (53.8%), and regional development banks generally (53.3%).

Two institutions trail well behind the rest: the United Nations, at 41.4%, and the New Development Bank (NDB), at 30.0%. The UN's relatively low placement is notable given its symbolic centrality to multilateralism - it is rated as less important to development outcomes specifically than five of the seven other institutions listed, including regional and Asia-focused development banks that have narrower, more technical mandates.

This finding recurs later in the report, where the UN also trails as the least-trusted channel for resolving the Middle East conflict specifically (see Figure M5), suggesting a broader pattern rather than a one-off result.

D2. Full distribution of institutional importance ratings

Question: To what extent do you rate the importance of each of the institutions below?

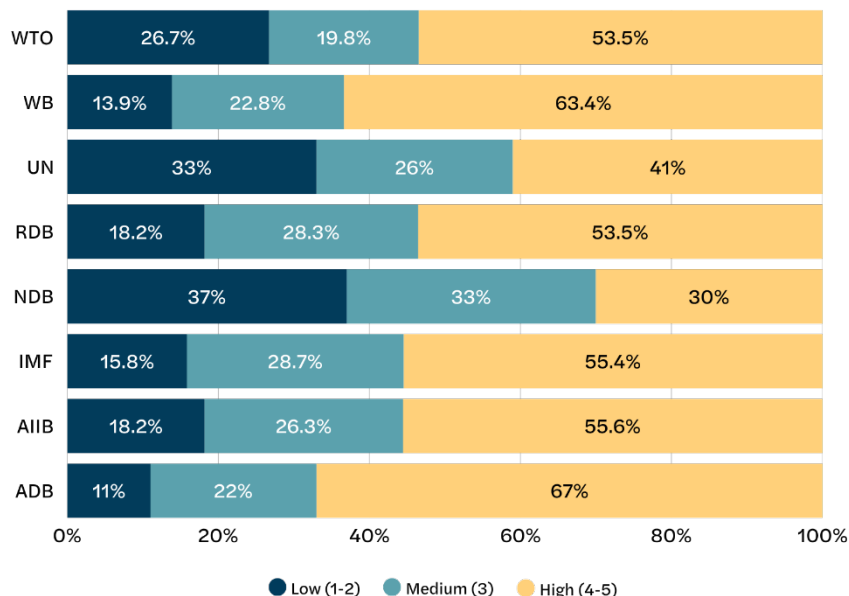


Figure D2. Distribution of institutional importance ratings

Figure D2 shows the complete High/Medium/Low breakdown behind the D1 rankings, adding nuance the topline ranking alone does not capture. The UN has both, the second lowest High Importance share (41%) and the highest Low Importance share of any institution at 33% - more than double the World Bank's 14% Low Importance share and three times the Asian Development Bank's 11%.

The NDB, despite ranking last on the High Importance share (30%), is not the most actively dismissed institution: its Low Importance share (37%) is comparable to the UN's, but it also draws the highest Medium Importance share of any institution (33%), suggesting respondents are more genuinely lukewarm or uncertain about the NDB than actively negative.

By contrast, the ADB's rating is the most lopsided toward positive views, with 67% High Importance and only 11% Low Importance. The pattern across all eight institutions suggests that skepticism toward the UN is more settled and negative in character than skepticism toward the newer, BRICS-associated NDB, which reads more as unfamiliarity or ambivalence.

D3. Importance of multilateral institutions, by country income level

Question: To what extent do you rate the importance of each of the institutions below?

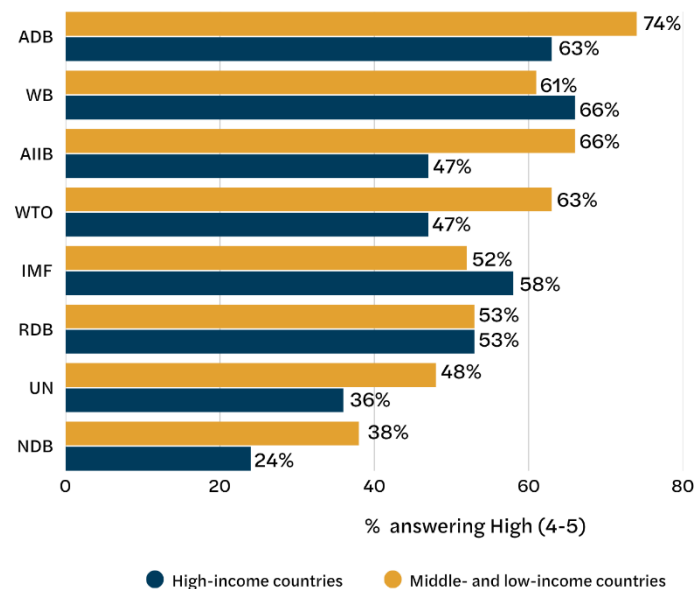


Figure D3. Importance of multilateral institutions by country income level

Figure D3 splits the D1 High-Importance rating share by income group and shows the widest gaps concentrated on the newer and non-Western-led institutions. The Asian Infrastructure Investment Bank is rated High by 66% of expert respondents from middle/low-income countries versus just 47% of high-income countries - a 19-point gap - and the WTO shows a similar 16-point gap (63% versus 47%).

The NDB, though rated lowest overall, still shows a 14-point income gap in the same direction (38% versus 24%). The UN, notably, breaks the general pattern of Western-led institutions being favored by respondents from high-income countries, in that middle/low-income countries respondents rate it more positively (48%) than high-income countries respondents do (36%). The ADB is the one institution both groups rate similarly highly (74% middle/low, 63% high income), making it the only institution with broad, income-independent support in the dataset.

The general tilt, which is that non-Western and newer institutions rated more favorably by respondents from Middle/Low-Income countries, echoes the strategic-autonomy preference already seen in the foreign-policy-goals section.



E. Trust in Other States

Having assessed institutions, the report turns to states: how much does this panel trust individual countries, namely the G20 countries, to act responsibly in international affairs, and does trust track the same high-income / middle-low-income divide already visible in the goals, risk, and institutions sections?

E1. Trust to act responsibly, by country

Question: How much do you trust the G20 countries will act responsibly in the world?

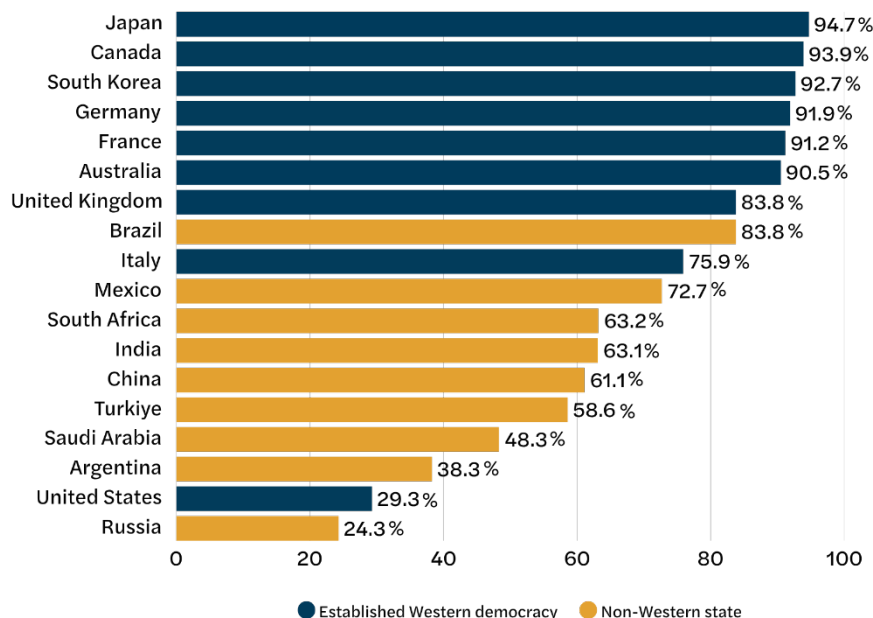


Figure E1. Trust in countries to act responsibly

Figure E1 ranks 19 G20 countries by the share of respondents who trust them to act responsibly in international affairs (combining "High" and "Some" trust, with "Not sure" responses excluded from the base), split by whether each country is coded as an established Western democracy or a non-Western state.

Japan leads at 94.7%, followed by Canada (93.9%), South Korea (92.7%), Germany (91.9%), France (91.2%), and Australia (90.5%). Noted that all established Western democracies are clustered near the top. The most striking result is the United States, which places second-to-last at 29.3%, just above Russia at 24.3% and below every non-Western state except Argentina (38.3%) and Saudi Arabia (48.3%). The U.S. is rated below China (61.1%) and India (63.1%) despite its formal classification alongside the highest-trust Western democracies.

Brazil (83.8%) and Indonesia (72.2%) rate among the more trusted non-Western states, roughly on par with or ahead of Italy (75.9%), a Western democracy. The gap between the U.S.'s formal category and its actual standing in the data is the single most notable feature of this figure.

E2. Average trust in Western democracies and non-Western states, by income

Question: How much do you trust the G20 countries will act responsibly in the world?

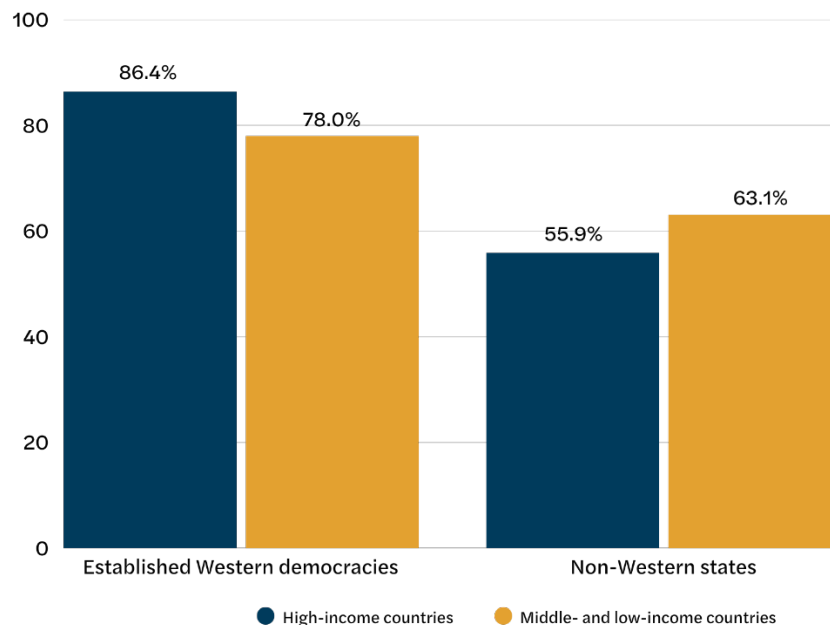


Figure E2. Average trust in Western democracies and non-Western states by country income level

Figure E2 aggregates the E1 country-level results into a single average trust score per respondent for each of the two country groups, split by respondent country's income level. Respondents from High-income country show a wide gap between how much they trust established Western democracies on average (86.4%) and non-Western states (55.9%) - a 30.5-point spread.

Respondents from Middle- and Low-income countries show a narrower gap: 78.0% average trust in Western democracies against 63.1% for non-Western states, a 14.9-point spread - roughly half the size of the high-income group's gap.

In other words, both respondent groups trust the Western-democracy bloc more than the non-Western bloc on average, but High-Income country respondents draw a much sharper line between the two groups than respondents from middle/low-income countries do.

This mirrors the income-based pattern seen in the multilateral institutions section (D1), where Middle/Low-Income countries respondents likewise rated non-Western and newer institutions comparatively closer to how they rated established Western-led ones.



F. U.S. - China Competition

This section tests the patterns established so far against a specific case: how respondents assess the U.S.-China rivalry, and whether the income-based divide in strategic posture persists when the question is about a specific great-power rivalry rather than general alignment.

F1. Regional approach to U.S.-China competition

Question: How would you characterize your region's approach to U.S.-China competition today?

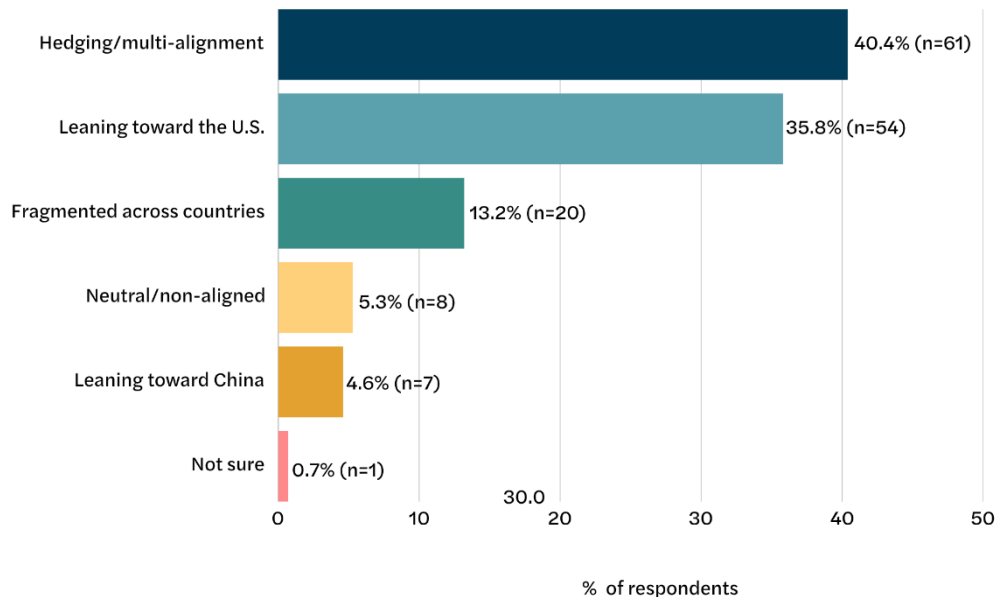


Figure F1a. Regional approaches to U.S.-China competition

Figure F1a shows how respondents characterize their region's current approach to U.S.-China competition. Hedging or multi-alignment is the plurality choice at 40.4% (n=61), narrowly ahead of leaning toward the U.S. at 35.8% (n=54). Far behind are a fragmented approach across countries (13.2%, n=20), neutral/non-alignment (5.3%, n=8), and leaning toward China (4.6%, n=7). Only one respondent selected "not sure."

Combining the two directional-alignment options (leaning U.S. plus leaning China) yields 40.4% - exactly matching the hedging share - meaning respondents are as likely, in aggregate, to describe their region as actively hedging as they are to describe it as leaning toward one major power.

The near-absence of a pro-China lean (4.6%) relative to a pro-U.S. lean (35.8%) is notable and stands in contrast to some of the institutional-trust findings elsewhere in this report, where non-Western and Chinese-associated institutions score more competitively.

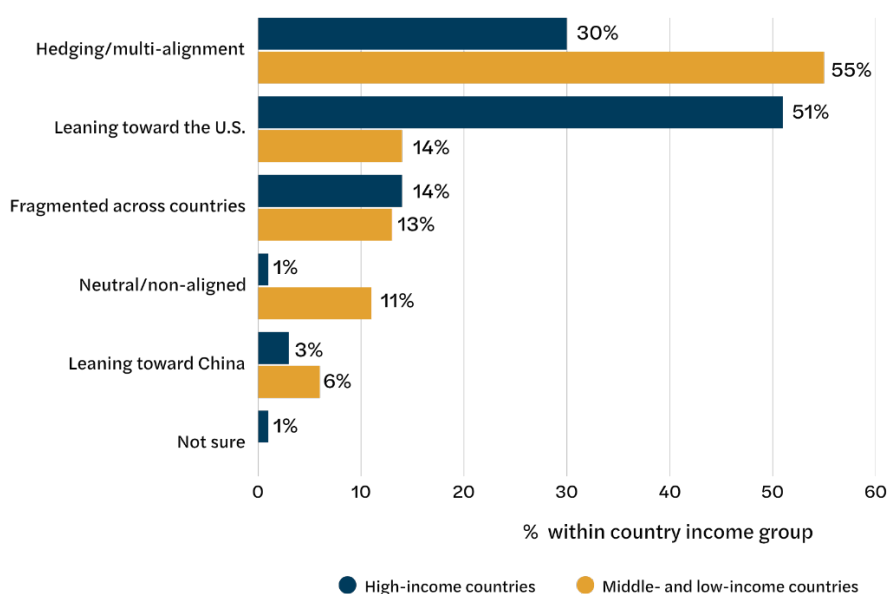


Figure F1b. Regional approaches to U.S.-China competition by country income level

Figure F1b splits the F1 results by country income level. It shows one of the largest divides anywhere in this report. High-Income country respondents describe their region as leaning toward the U.S. by a clear majority (51%), while only 14% of Middle/Low-Income countries respondents say the same, registering a 37-point gap.

The pattern reverses for hedging: 55% of respondents from middle/low-income countries describe their region as hedging or multi-aligned, compared with 30% of high-income country respondents. Both groups report a similarly small lean toward China (6% for the Middle/Low Income countries respondents, 3% for high income) and a similarly small "fragmented" reading (13% and 14%).

This divide is consistent with, and arguably the clearest single expression of, the broader pattern already visible in the foreign-policy goals section. Respondents from Middle- and Lower-Income countries in this sample describe a more autonomy-seeking, non-aligned regional posture. Meanwhile, High-Income countries respondents describe a regional environment more clearly oriented toward the United States.

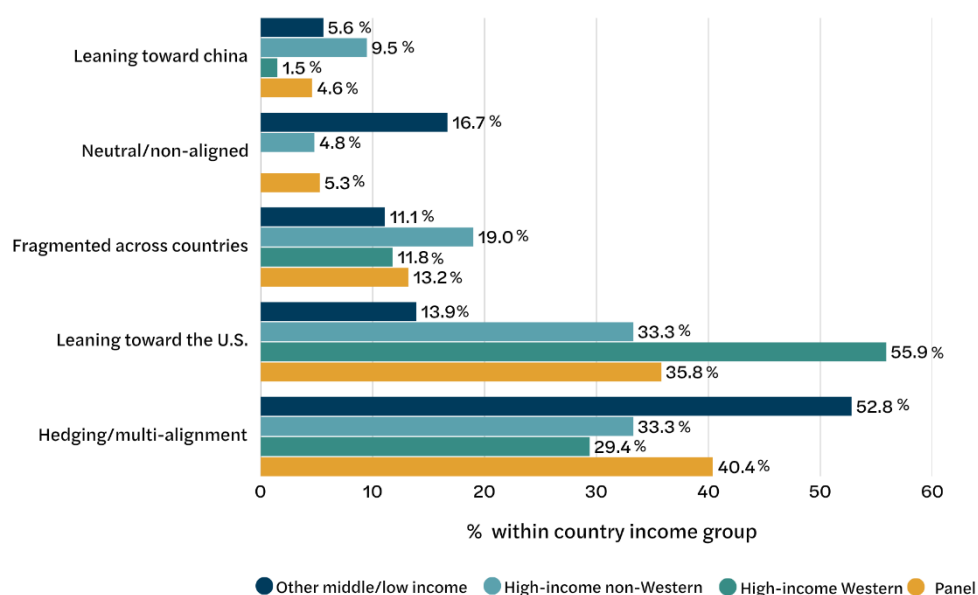


Figure F1c. Regional approaches to U.S.-China competition by bloc

Figure F1c reveals a more nuanced picture if the results are further recoded. Expert respondents from higher income countries show clear preference towards the US. However, expert respondents from higher-income Western countries indicate that their region shows a much more tendency of leaning towards the US than respondents from higher income non-Western countries.

F2. Most consequential pressure from U.S.-China rivalry

Question: Which type of pressure is most consequential for developing countries today?

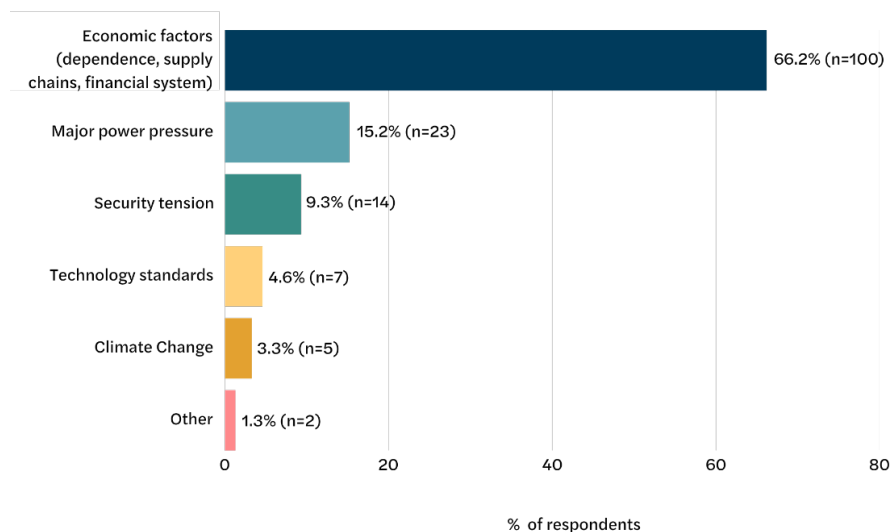


Figure F2. Most consequential pressure from U.S.-China competition

Figure F2 asks which type of pressure from U.S.-China competition is most consequential for developing countries. Economic factor, which include economic dependence, supply chains, financial and currency dominance, is the dominant answer at 66.2% (n=100), more than four times the next-highest option, major power threats and pressure, at 15.2% (n=23).

Despite the security-heavy professional background of this panel as noted in the demographics section, security and military tension draws only 9.3% (n=14), while technology standards (4.6%), and climate change (3.3%) trail further behind.

The clear dominance of an economic framing over a security framing for this specific question is consistent with the broader pattern in the foreign-policy-goals section, where economic growth via trade was the most commonly named second priority (B2) even though security-oriented goals dominated first-priority choices - suggesting the expert respondents see economic exposure, more than military risk, as the primary channel through which great-power rivalry affects developing countries.

F3. Agency under U.S.-China rivalry

Question: To what extent do you agree or disagree with the following statement:

“Developing countries retain meaningful agency under great-power rivalry”

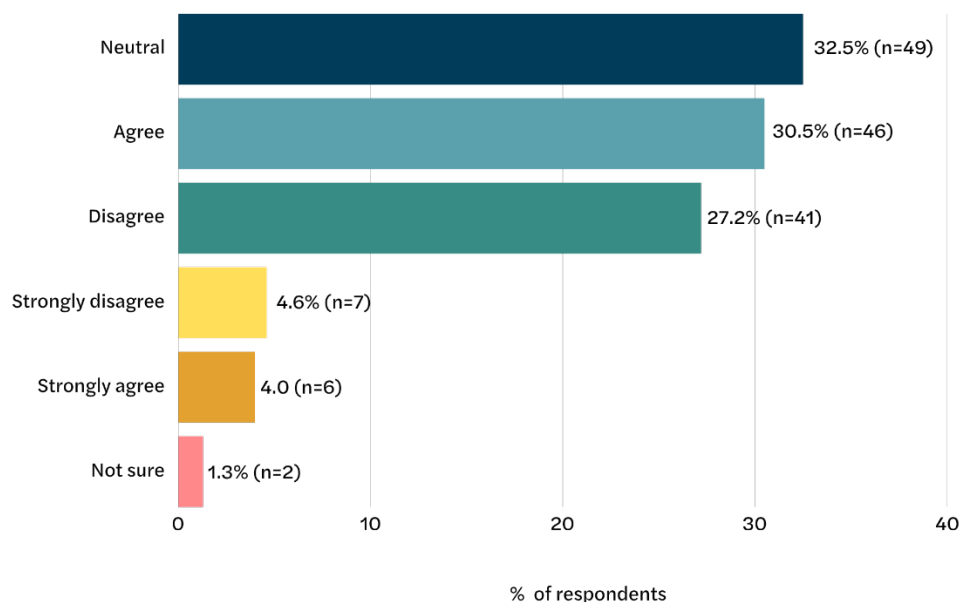


Figure F3. Agency amid U.S.-China rivalry

Figure F3 reports agreement, and disagreement, with the statement that developing countries have retained meaningful agency under the current U.S.-China rivalry. Opinion is nearly evenly split three ways: 32.5% (n=49) are neutral, 30.5% (n=46) agree, and 27.2% (n=41) disagree, with small tails at strongly disagree (4.6%, n=7) and strongly agree (4.0%, n=6).

Combining agree and strongly agree gives 34.5% agreement overall, against 31.8% combined disagreement - a near-even split once the sizable neutral bloc is set aside.

Unlike most other questions in the U.S.-China section, this item shows no dominant majority view, indicating the panel of these expert respondents is genuinely divided - or genuinely uncertain - on whether developing countries have preserved real independence of action, even though a large plurality elsewhere in the survey describes those same countries as actively hedging (see Figure F1) rather than simply aligning with one power.



G. Middle East Conflict

The report now turns from a structural rivalry to an active regional conflict, asking whether the energy-risk and hedging patterns identified above hold up when respondents are asked about a specific, live crisis rather than general geopolitical trends. It is worth noting that this section's fieldwork (June-July 2026) reflects a single snapshot in time, a consideration relevant to interpreting any single-period trust or risk rating discussed here and in the following section.

G1. Risk of regional escalation

Question: How likely it is the conflict between the United States/Israel and Iran will shift the geopolitical and security orders in the region?

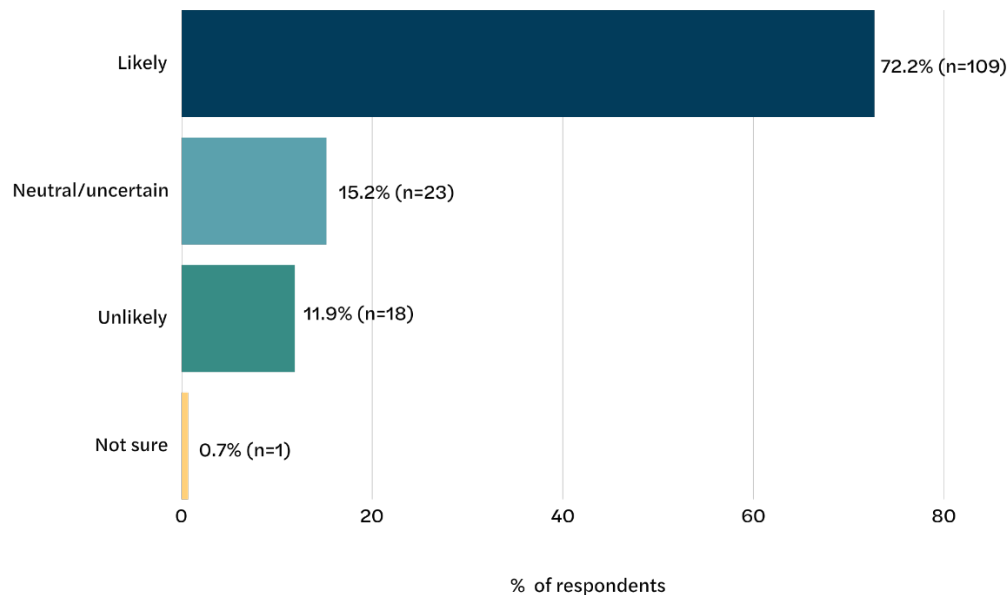


Figure G1. Perceived risk of regional escalation

Figure G1 asks how likely the U.S./Israel-Iran conflict is to shift the region's geopolitical and security order. A strong majority sees escalation as likely: 37.7% (n=57) say "Very Likely" and a further 34.4% (n=52) say "Likely," for a combined 72.1%.

Only 15.2% (n=23) are neutral or uncertain, and just 11.9% combined say the conflict is unlikely or very unlikely to shift the regional order.

This is one of the more decisive results in the report - nearly three in four respondents expect meaningful geopolitical consequences from the conflict, with almost no one confidently predicting the status quo will hold.

G2. Key global risks associated with the Middle East conflict

Question: Which of the following risks do you believe are most likely to result from the conflict?

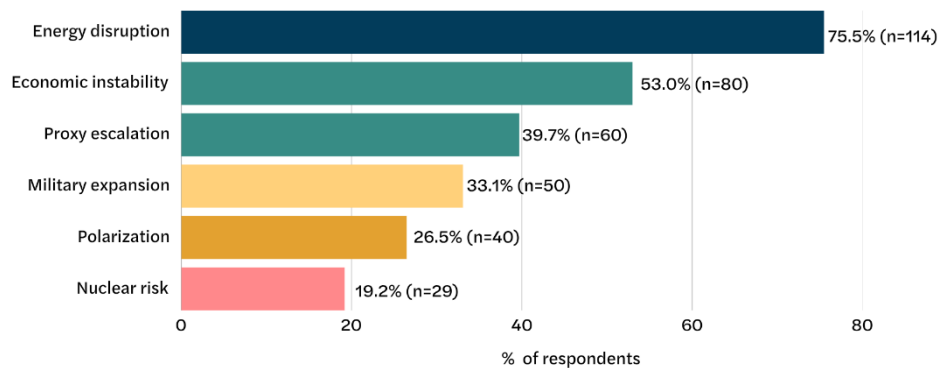


Figure G2. Perceived global risks associated with the Middle East conflict

Figure G2 shows which global risks respondents most associate with the Middle East conflict, with up to two selections allowed against the full base of 151 respondents.

Disruption of global energy supply is by far the top concern at 75.5% (n=114), well ahead of global economic instability at 53.0% (n=80) and expansion of regional military conflict via proxy escalation at 39.7% (n=60).

Broader military expansion (33.1%) increased geopolitical polarization (26.5%), and nuclear proliferation risk (19.2%, the lowest ranked) trail further behind.

The dominance of the energy-disruption pathway here directly echoes the economic-security section earlier in the report, where energy supply shocks were already rated among the highest-probability and highest-severity risks globally (see figure C1, C4) - this panel of respondents appears to view the Middle East conflict primarily through the same energy-security lens it applies to global risk more broadly, rather than primarily as a nuclear-proliferation or great-power-polarization concern.

We can also identify how many of the six risks each respondent selected and the most frequent combination within each group as shown in Figure G2a below.

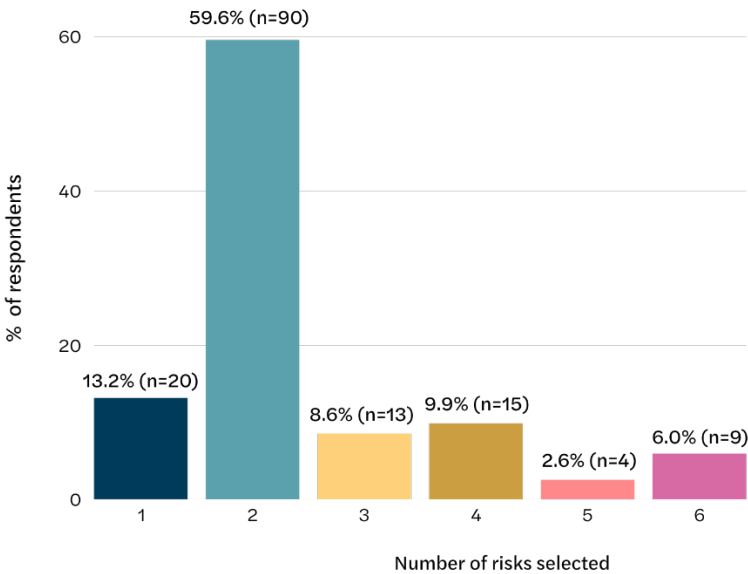


Figure G2a. Number of risks selected per respondent

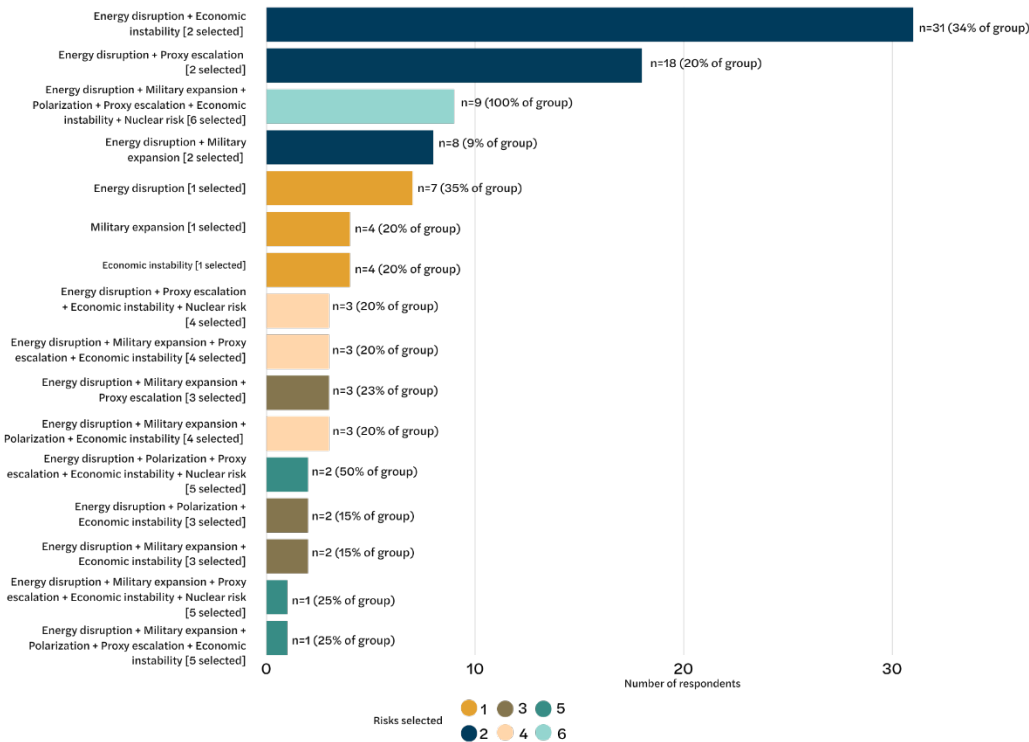


Figure G2b. Most frequent combinations of global risks

After zooming in, the data shows that indeed the expert respondents consider that risks associated with the conflict in the Middle East are economic in nature.

G3. Role of major and regional powers in the conflict

Question: How would you evaluate the role of the following actors in the conflict?

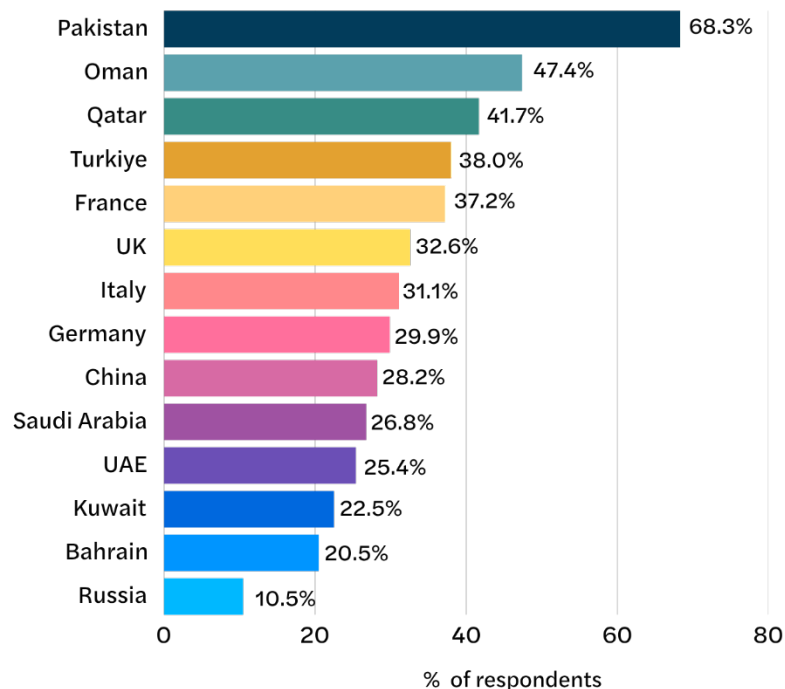


Figure G3. Positive ratings of countries' roles in the conflict

Figure G3 rates 14 countries, given their proximity and association with the conflict in particular and the regional concern in general, on the positivity of their role in the conflict (share rating 4 or 5 on a 1-5 scale, the rate of which essentially means that they are considered as having high role in the conflict).

Pakistan stands out well above every other actor at 68.3%, more than 20 points ahead of the second-place Oman (47.4%) and Qatar (41.7%). Meanwhile, some countries are considered in the second tier of importance, including Türkiye (38.0%), France (37.2%), the UK (32.6%), and Italy (31.1%).

Germany (29.9%), and China (28.2%) form a middle tier in the high-20s to high-30s range. Gulf states with direct proximate to the conflict, such as Saudi Arabia (26.8%), the UAE (25.4%), Kuwait (22.5%), and Bahrain (20.5%) are rated lower than several external powers, and Russia rates lowest of all at 10.5%.

Pakistan's clear lead as the most positively rated actor, ahead of the Gulf states with more direct stakes in the conflict and ahead of the major external powers, is the most distinctive feature of this figure and likely reflects the composition of the sample, though the data alone cannot establish the exact reason for its outsized rating.

G4. Policy response for developing countries

Question: What strategy should developing countries adopt in response to the conflict?

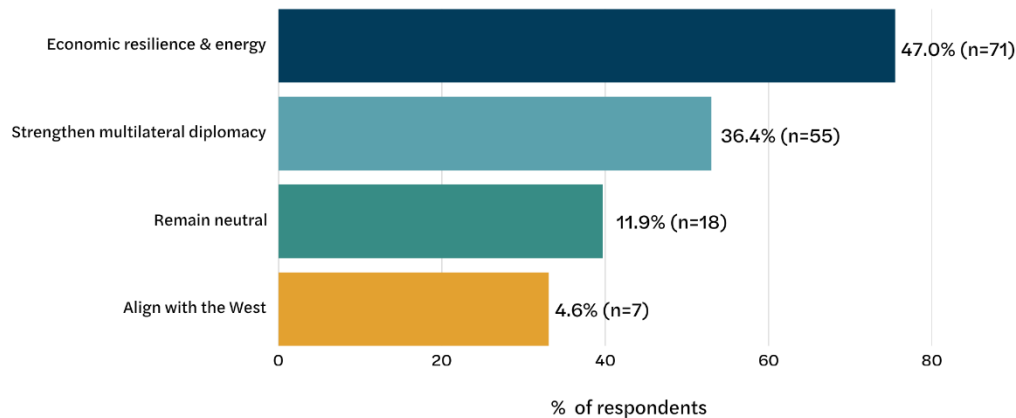


Figure G4. Preferred policy responses for developing countries

Figure G4 reports the responses to the question of what strategy developing countries should adopt in response to the Middle East conflict. “Focusing on economic resilience and energy diversification” is the top choice at 47.0% (n=71), followed by “strengthening multilateral diplomacy to reduce tensions” at 36.4% (n=55).

“Remaining neutral” draws 11.9% (n=18) and “aligning with Western countries” draws just 4.6% (n=7). Meanwhile, “aligning with Iran or regional counter-alliances” draws effectively no support. Combined, the two non-alignment strategies which include “economic self-reliance” and “multilateral diplomacy” account for 83.4% of responses, dwarfing any alignment-based strategy.

This finding is consistent with the broader hedging preference seen throughout the report (Figures F1, H1): even when asked specifically how developing countries should respond to an active regional conflict, this panel of respondents overwhelmingly favors self-reliance and diplomacy over choosing a side.

G5. Policy response for developing countries, by country income level

Question: What strategy should developing countries adopt in response to the conflict?

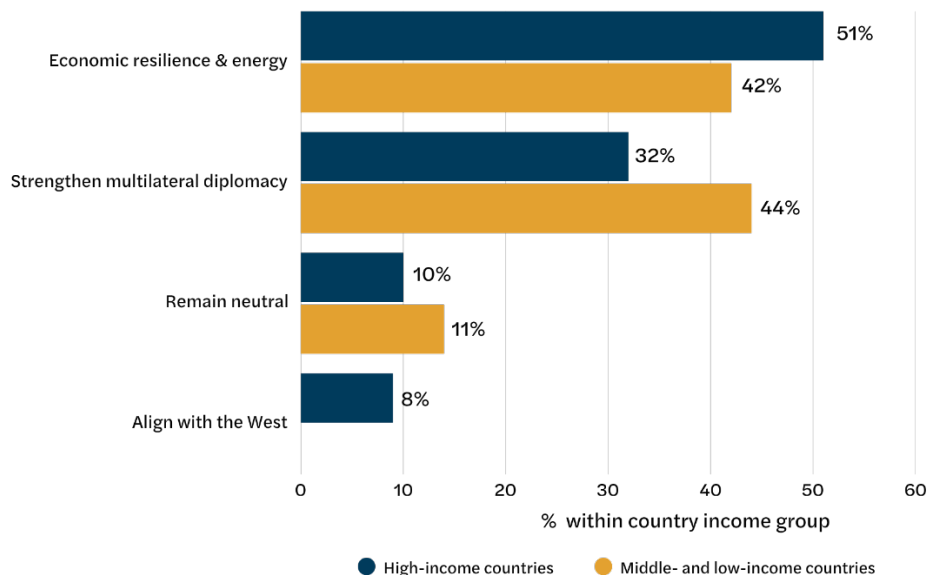


Figure G5. Preferred policy responses for developing countries by country income level

Figure G5 above splits the M4 policy-response results by the level of country income group. Expert respondents from High-Income countries favor “economic resilience and energy diversification” more strongly (51%) than Middle/Low-income countries respondents (42%),

On the other hand, respondents from Middle/Low-Income countries favor “strengthening multilateral diplomacy” more strongly (44% versus 32% for high income).

“Aligning with the West” draws some support only from High-Income countries respondents (8%), essentially none from respondents from Middle/Low-Income countries.

The gap here is real but considerably narrower than the sharp divides seen in the U.S.-China regional-approach figure (F1) or the foreign-policy-goals figure (B1) - both income groups converge on the same two broad strategies (self-reliance and diplomacy), they simply weight the two differently, which suggests the income-based divide documented elsewhere in this report is more about degree than about fundamentally different strategic instincts on this particular question.

G6. Effectiveness of global governance channels

Question: How Important should international institutions be in managing or resolving the conflict?

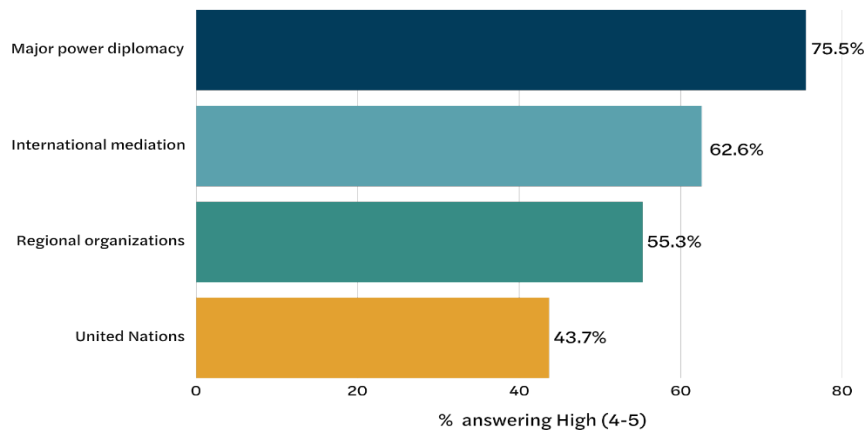


Figure G6. Perceived effectiveness of global governance channels

Figure G6 rates four channels for maintaining international peace and security in relation to the conflict, by share rating them 4 or 5 in importance. “Major power diplomacy” is rated most effective at 75.5%, followed by “international mediation initiatives” (62.6%) and “regional organizations” (55.3%).

The United Nations trails all three at 43.7%. This ordering echoes the multilateral-institutions Figure D1 earlier in the report, where the UN likewise rated below several narrower-mandate institutions on importance for development outcomes. Here, in the specific context of an active regional conflict, the UN again trails as the least-favored mechanism, this time behind direct major-power diplomacy specifically.

The consistency of this result across two independently asked questions strengthens the case that skepticism toward UN effectiveness is a genuine, recurring feature of this panel of respondents views rather than an artifact of either question's specific wording.



H. Forecasts and Worldview

The final substantive section turns from present assessments to forecasts and to the underlying worldview that has been implicit throughout the report so far: where do respondents expect their region to be in five years, and how do they believe international politics works at the most general level?

H1. Regional trajectory over the next five years

Question: Over the next 5 years your region will most likely move toward:

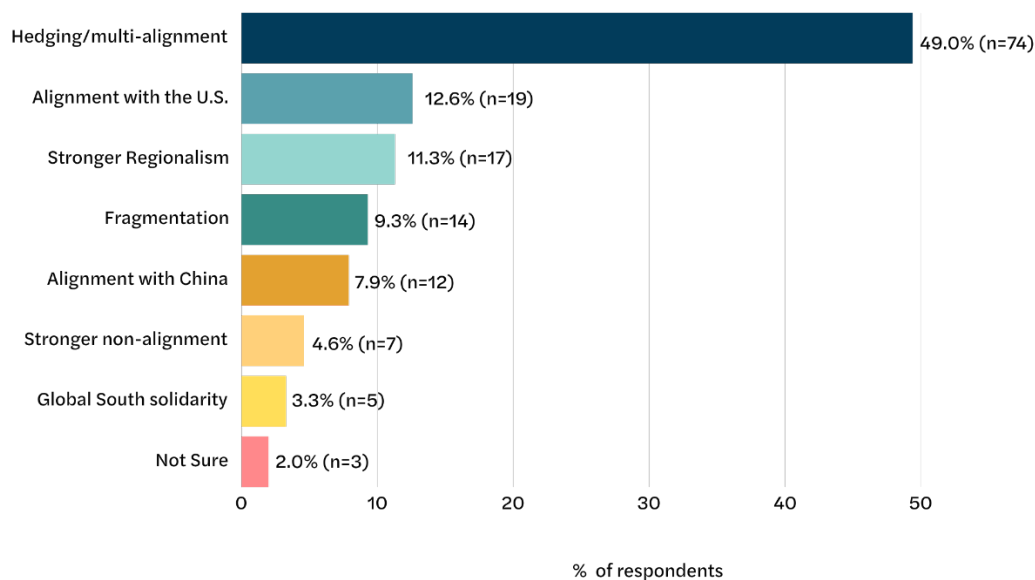


Figure H1. Expected regional trajectory over the next five years

Figure H1 shows where respondents expect their region to move over the next five years. “Hedging or multi-alignment” is the clear plurality forecast at 49.0% (n=74) - essentially half the sample - far ahead of “alignment with the U.S.” (12.6%, n=19), “stronger regionalism” (11.3%, n=17), “fragmentation” (9.3%, n=14), and “alignment with China” (7.9%, n=12).

“Stronger non-alignment” (4.6%) and “Global South solidarity” (3.3%) draw the smallest shares. This forward-looking forecast lines up closely with, and slightly exceeds, the F1 figure's assessment of the present-day regional posture (40.4% describing current hedging behavior). The expert respondents not only see hedging as the dominant strategy today, they expect it to become even more dominant over the next five years rather than resolving into a clearer alignment with either major power.

H2. Trans-Atlantic relations

Question: Do you think the current rupture in Trans-Atlantic between Europe/NATO and the U.S. is:

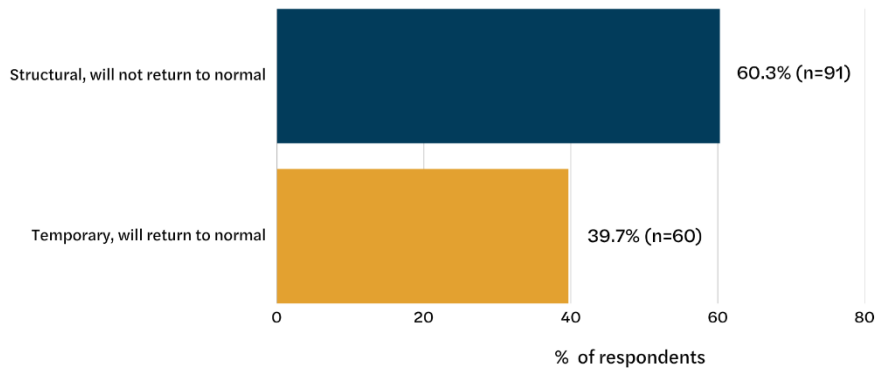


Figure H2. Perceptions of the durability of the trans-Atlantic rupture

Figure H2 displays whether the current rupture in trans-Atlantic relations between Europe/NATO and the U.S. is structural or temporary. A majority, 60.3% (n=91), views the rupture as structural and unlikely to return to normalcy after the Trump administration, against 39.7% (n=60) who see it as temporary.

This majority view that the rupture reflects a lasting shift, rather than a transient disruption tied to one administration, is consistent with the broader expectation elsewhere in the report that hedging and multi-alignment will continue to intensify (H1) rather than that the prior U.S.-aligned order will reassert itself.

H3. Trans-Atlantic relations, by country income level

Question: Do you think the current rupture in Trans-Atlantic between Europe/NATO and the U.S. is:

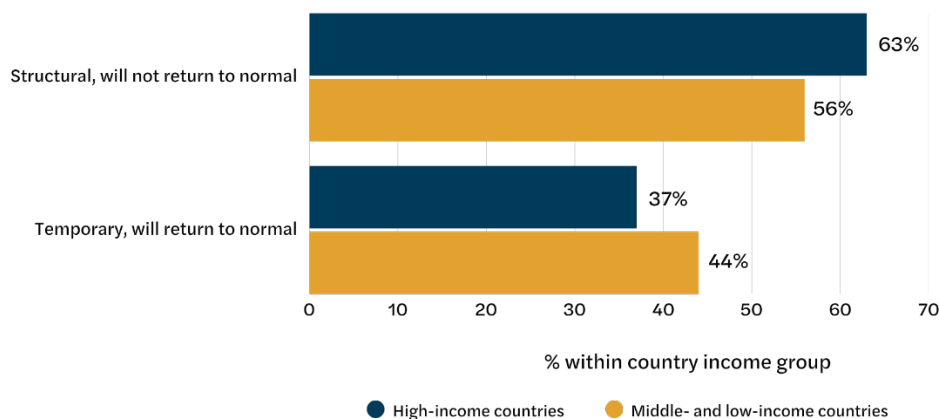


Figure H3. Perception of the durability of the trans-Atlantic rupture by country income level

Figure H3 splits the Figure H2 results by country income group and shows one of the narrower income gaps in the report. Respondents from High-Income countries are somewhat more likely to view the trans-Atlantic rupture as structural (63%) than Middle/Low-income countries respondents (56%), but both groups lean the same direction by a clear majority.

This seven-point gap is considerably smaller than the divides seen on questions like regional alignment (Figure F1, a 37-point gap) or top foreign policy priority (Figure B1), suggesting that on the specific question of whether trans-Atlantic relations have permanently changed, this panel holds a view that is largely shared across country-income groupings rather than one that splits along the income-based fault line visible elsewhere in the report.

Question: How long do you think the normalization will take place?

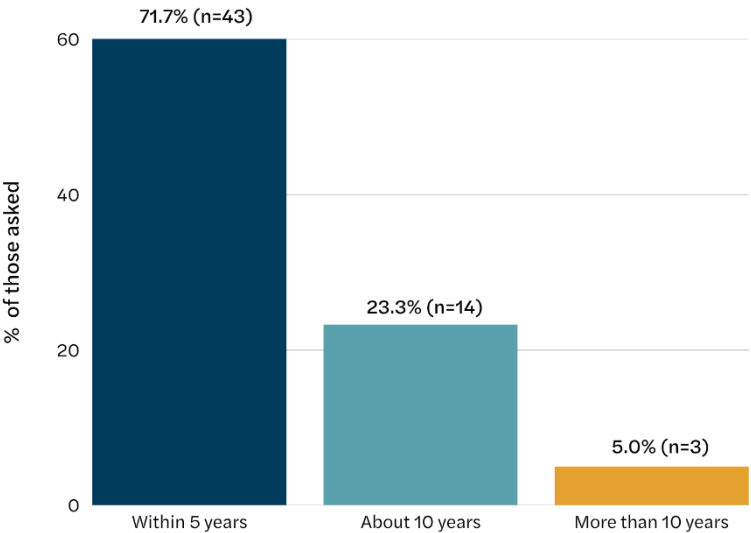


Figure H3a. Expected time for trans-Atlantic relations to return to normal

We then ask the expert respondents who said that the rupture in trans-Atlantic relations is temporary how many years the relations will return to normal. Figure H3a reports their estimate on the time needed for the return to normalcy in the trans-Atlantic relations. More than 70% think that it will take 5 years for the trans-Atlantic relations to return to normal.

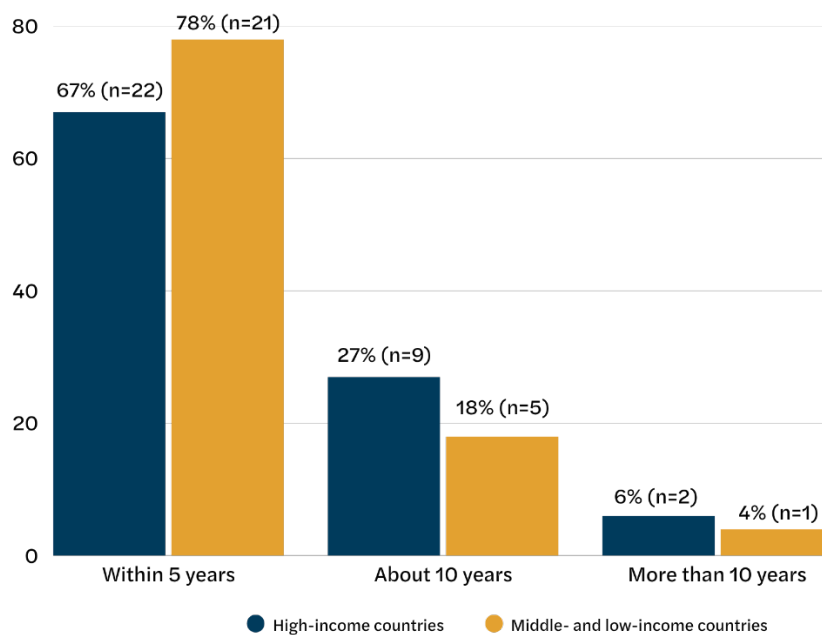


Figure H3b. Expected time for trans-Atlantic relations to return to normal by country income level

Furthermore, Figure H3b above accentuates the previous finding. Of those who think that the rupture in Trans-Atlantic relations is temporary, expert respondents from high-income countries are more skeptical that it would return to normal in the time span that their counterparts from the Middle/Low-income countries think.

Worldview Statement

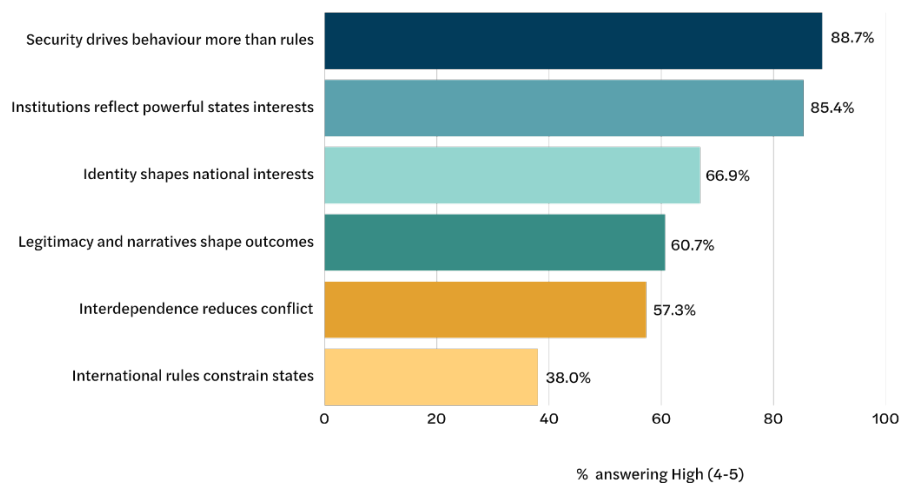


Figure H3c. Views on how international politics works

Figure H3c reports agreement (share of answering 4 or 5 on a 1-5 scale, i.e. agreeing strongly) with six statements about how the international system functions. Near-consensus emerges on two realist claims: 88.7% agree that “security drives state behavior more than rules”, and 85.4% agree that “institutions reflect the interests of powerful states”.

Agreement drops for the statements of “identity shaping national interests” (66.9%) and “legitimacy/narratives shaping outcomes” (60.7%) and drops further for the statement of “interdependence reducing conflict (57.3%). The statement that “international rules constrain states” draws the lowest agreement by a wide margin, at just 38.0%. It means that fewer than two in five respondents agree that rules meaningfully bind state behavior, while nearly nine in ten agree that security considerations dominate over rules.

This expert respondents’ collective worldview is thus heavily realist: power and security are seen as the primary drivers of international outcomes, while formal rules are seen as comparatively weak constraints.

Full distribution of worldview statements

Question: Please indicate how much you agree or disagree with each statement.

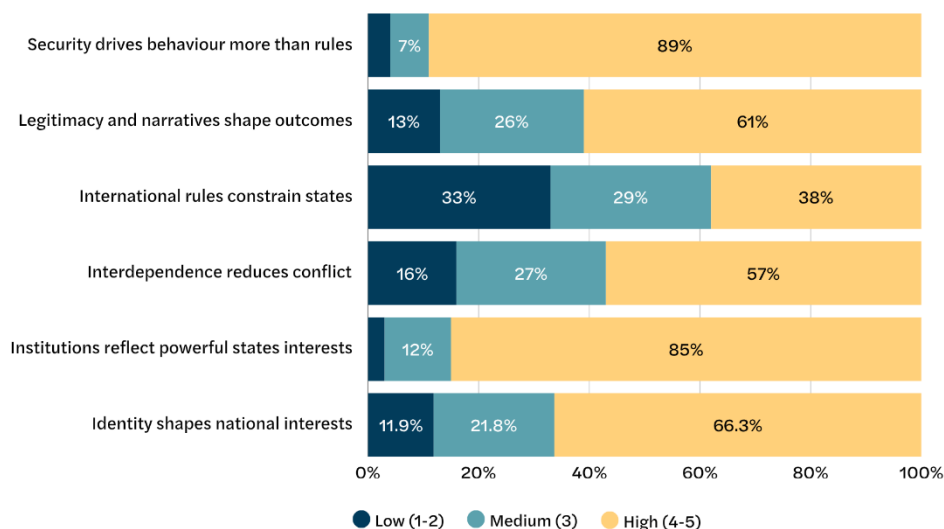


Figure H4. Distribution of responses across worldview statements

Figure H4 shows the complete High/Medium/Low breakdown behind the P1 headline agreement figures. The statement that “international rules constrain states” - already the lowest-agreement item at 38% - also carries the highest Low (disagreement) share of any statement at 33%, confirming this is a genuinely contested claim rather than one where opinion simply clusters near the neutral midpoint.

By contrast, “security drives behavior more than rules” has almost no disagreement, with only a small Low share alongside its 89% High share and 7% Medium share. It is safe to assume that this is close to a settled consensus view among the expert respondents of the survey. The other four statements fall in between, each drawing a Low share in the 12-16% range.

The pattern confirms that this group of respondents’ realist leanings are strongest and most uniform on the security-versus-rules question specifically. On the contrary, views on rules as a constraint are the one place in this worldview battery where meaningful disagreement persists.

Worldview statements, by country income level

Question: Please indicate how much you agree or disagree with each statement.

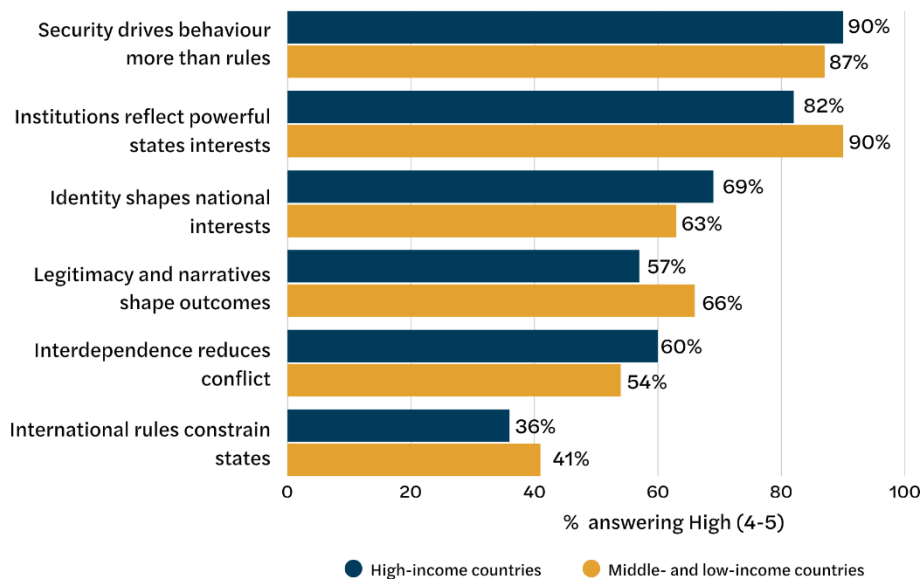


Figure H5. Worldview statements by income level

Figure H5 splits the six P1 worldview statements by level of country income group. Respondents from Middle/Low-income countries agree more strongly that “institutions reflect powerful states’ interests (90% versus 82% for High Income) and that “legitimacy and narratives shape outcomes” (66% versus 57%).

High-income country respondents agree more than their counterpart from the Middle/Low-income country that “interdependence reduces conflict” (60% versus 54%) and that “identity shapes national interests” (69% versus 63%).

Nevertheless, both groups agree almost identically that “security drives behavior more than rules” (87% Middle/Low, 90% High Income). In addition, both show similarly modest agreement that “international rules constrain states” (41% middle/low, 36% high income).

In short, both income groups share the same realist baseline on the most consensus-heavy items. However, Middle- and Lower-Income country respondents lean further toward viewing the international system as power-driven and legitimacy-contested specifically. This is the same underlying divide, expressed here in worldview terms, that runs through the foreign-policy, institutional-trust, and regional-alignment findings across the rest of the report.

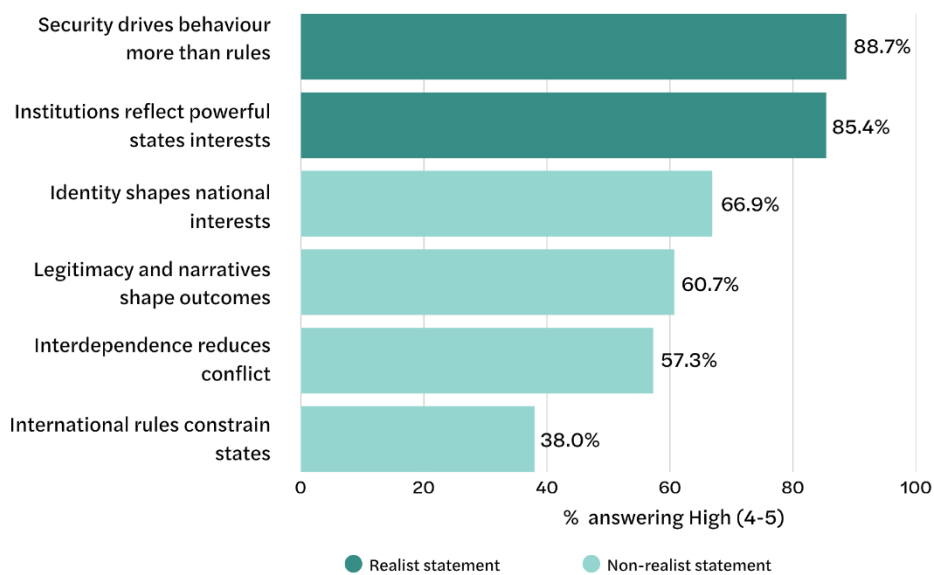


Figure H5a. Views on how international politics works

Figure H5a reports the expert respondents' view on how international politics works. In essence, it reveals how this panel shows agreement, and disagreement, on “realist” and “non-realist” statement of how it works. The expert respondents seem to share the realist view as close to 90% confirm the two statements that reflect such a view. Regardless, there is also substantial agreement on two “non-realist” statements – identity shapes national interests and legitimacy and narratives shape outcomes – as approximately 60 to 70% of the respondents agree.

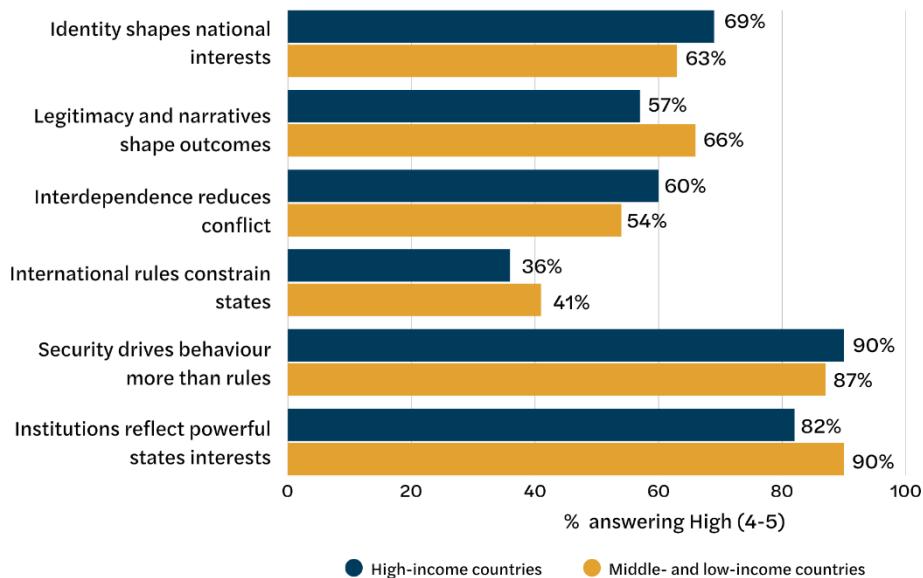


Figure H5b. The intra-Western divide between Europe and North America

Figure H5b indicates how respondents from High-Income countries respond to the realist and non-realists statements compared to those from Middle/Low Income countries.



I. Further Analysis

This section presents additional crosstabulation and probability analysis beyond the descriptive figures discussed above.

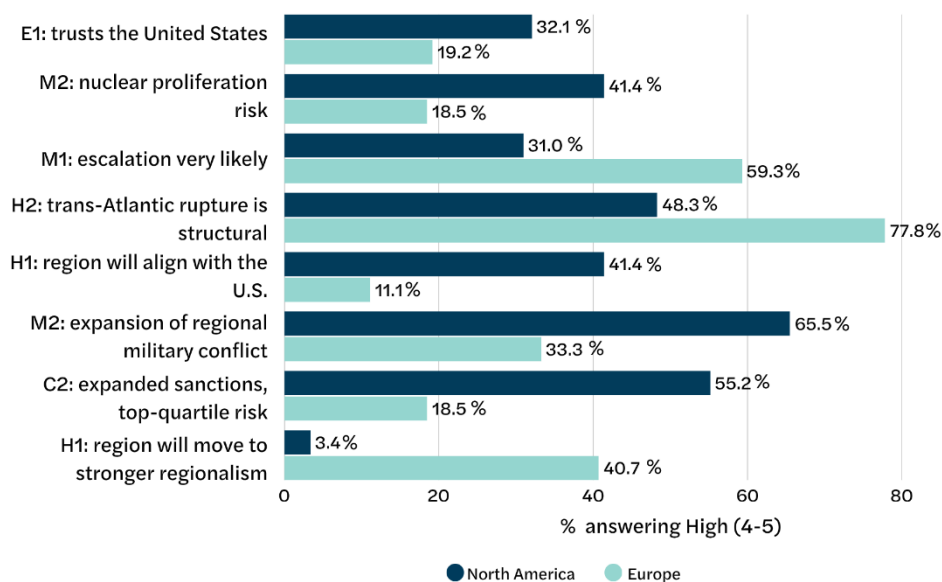


Figure I1. The intra-Western divide between Europe and North America

Figure I1 shows more details about the intra-Western countries divide between European and North American countries. On the 8 issues revealed in Figure I1, the divides are very discernible.

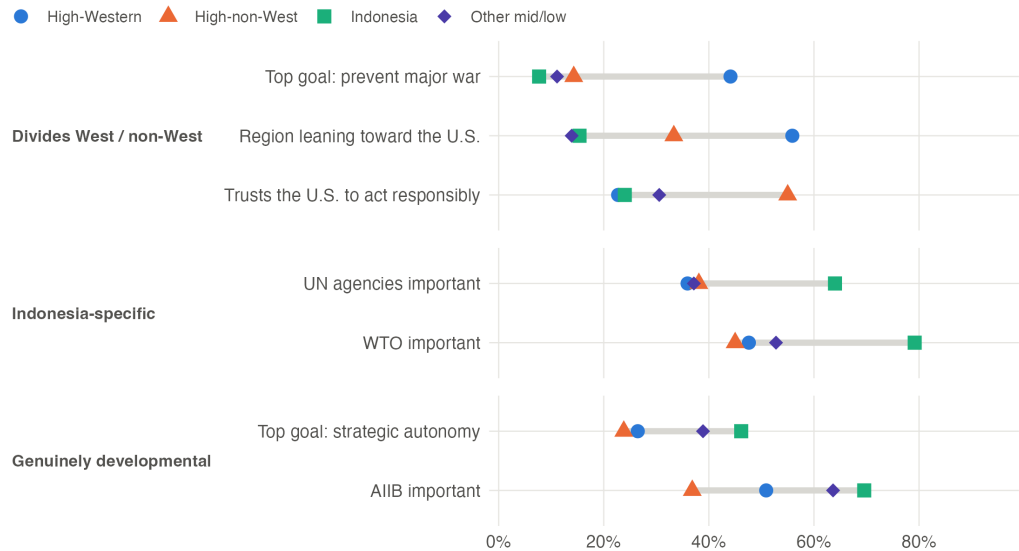
Only 3.4% respondents from North America think that their region will move to a stronger regionalism, while 40.7% from Europe do think so. Only 11.1% of expert respondents from Europe

think that their region will align with the US, in contrast to 41.4% of the respondents from North America.

Meanwhile, 77.8% of expert respondents from Europe believe that the rupture in the trans-Atlantic relations is structural in contrast to 48.3% of those from North America who think that it is not.

One income axis, three different divides

Share of each group giving the response. The report compares only high-income (89) against middle/low-income (62) — a split that cannot separate development status from region.



2026 IIFA Expert Survey on Global Affairs, n=151. Groups: High-Western 68, High-non-Western 21, Indonesia 26, other middle/low 36. High-non-Western (n=21) is indicative. 'Not sure' excluded from base.

Figure I2. Some Highlights

Figure I2 above highlights some important findings plotted along the lines of the divide of Western and non-Western countries and their development status. In addition, it situates Indonesia among the country groupings. One interesting finding is that Indonesia’s respondents placed the importance of multilateral institutions, such as UN agencies and WTO, higher than the other country groupings’ respondents did.



J. Policy Implications

The patterns identified in this report raise questions rather than settle them and are offered here in that spirit rather than as recommendations.

- If this panel's skepticism toward the United Nations (Figure D1, M5) reflects a broader expert view, multilateral reform efforts may gain more traction by emphasizing narrower-mandate, technically focused institutions than by defending the UN's centrality directly.
- If hedging is this panel's expectation for the next five years (Figure H1) rather than just its description of the present (Figure F1), institutions and coalitions built around firm alignment with either the United States or China may be building on a shrinking base - particularly among middle- and low-income-country respondents.
- If energy-market disruption is this panel's consistent transmission channel from geopolitical risk to economic harm (Figures C1-C3, G2), economic security policy focused narrowly on trade or financial exposure may be addressing a secondary channel rather than the primary one this panel identifies.

These are questions the descriptive data raise for further discussion, not conclusions the descriptive figures alone can establish.

K. Concluding Narrative

Read as a whole, the 2026 IIFA Expert Survey describes a panel of senior, highly credentialed foreign-policy experts - overwhelmingly academic or think-tank based (85.5%), holding doctorates degree (78.1%), and averaging more than two decades of professional experience - whose collective outlook is shaped by two intersecting patterns: a broadly realist, security-first worldview, and a consistent level of country income-based divide in how that worldview translates into policy preference.

Both patterns recur across nearly every substantive section of the report, which is the strongest evidence that they reflect genuine, stable features of this panel's thinking rather than artifacts of any single question.

The realist worldview is the most well-supported pattern in the data, because it is corroborated by independent questions asked in different sections using different formats.

The P1 worldview battery shows 88.7% agreement that security drives state behavior more than rules and 85.4% agreement that institutions reflect powerful states' interests, against just 38.0% agreement that international rules meaningfully constrain states.

This same skepticism toward rules-based institutions surfaces independently in the multilateral-institutions section. In that section, the UN - the most prominent rules-based global institution - rates below narrower-mandate development banks on importance (see Figure D1: 41.4% High, versus 67.4% for the Asian Development Bank).

And again, in the Middle East conflict section, where the UN is rated as the least effective of four governance channels for managing that specific conflict (see Figure G6: 43.7%, versus 75.5% for direct major-power diplomacy).

Three separately worded questions that appear in three different sections, all point to the same underlying skepticism toward the UN and toward rules-based constraint generally. It is safe to say that this is a well-supported finding, not a coincidence of question phrasing.

The second pattern - an income-based country divide - is almost as well supported, appearing in every section of the report that includes an income breakdown. High-Income country respondents more often prioritize preventing major war as their top foreign policy goal (37% versus 10% for middle/low income, see Figure B3) and more often describe their region as leaning toward the U.S. (51% versus 14%, see Figure F1b).

Middle- and Low-Income country respondents (41.1% of the sample) more often prioritize strategic autonomy (42% versus 26%) and economic growth via trade (32% versus 15%). They more often describe their region as hedging (55% versus 30%, F1b), rate non-Western and newer institutions like the AIIB and WTO more favorably (see Figure D3), and register higher probability estimates for sanctions- and energy-related economic coercion (see Figure C3).

(66% top quartile) and the second highest in the section of probability battery (40% top band). Also independently, when asked specifically about the Middle East conflict, 75.5% of respondents name energy supply disruption as a key global risk - by far the top

choice, well ahead of economic instability (53.0%) or nuclear proliferation risk (19.2%).

That the same concern surfaces at the top of both a general risk-assessment question and a conflict-specific question, and fact that they are asked in different sections of the survey, makes this a strong rather than speculative connection.

A few connections in the data are more speculative and worth flagging. The unusually high positive rating given to Pakistan's role in the Middle East conflict (68.3%, see Figure G3) - well ahead of the Gulf states who are directly parties to regional diplomacy - cannot be

explained from the descriptive figures alone. It may reflect the fact that Pakistan has been actively trying to play the role of the peace broker in the conflict.

Similarly, the finding that the United States rates second-to-last in trust to act responsibly (29.3%, Figure E1), just above Russia and below China and India, is a striking and well-documented result on its own terms. But connecting it causally to the trans-Atlantic rupture finding (see Figure H2, 60.3% see the rupture as structural) is plausible but not something the data can establish directly.



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