



AI and the Next Global Order: Expert Survey

This survey asks for your expert judgment on how advanced AI capabilities and governance structures will reshape international order by 2035. It is part of CFR's scenario-based research project on AI, Power, and the Next Global Order, supported by the Patrick J. McGovern Foundation.

Your responses will be published in aggregate in a public research report. Your estimates may appear as anonymous data points in an interactive visualization; no response will be attributed to you by name without your explicit permission.

Questions marked with an asterisk (*) are required. All other questions, including open-text fields, are optional.

A note on terminology: Throughout this survey, "frontier AI capabilities" refers to the leading edge of what is technically possible at any given moment — a moving target, not today's benchmark. By 2035, the frontier will have advanced considerably. Unless a question specifies otherwise, please reason about frontier capabilities as they would exist at the time in question.

Four sections • ~10-12 minutes

Section 1. Axis estimates — where you place the world (~2 min)

Section 2. Inflection points — what would shift your estimates (~3 min)

Section 3. Policy questions (~4 min)

Section 4. Respondent profile (~2 min)



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Section 1: Axis Estimates

Place your expectations on the two dimensions anchoring this project. For each, give your best estimate and indicate your confidence.

* 1. By 2035, how concentrated or diffused do you expect frontier AI capabilities to be?

Highly concentrated (2-3 actors capable of building frontier systems)

Widely distributed (dozens of actors with independent frontier development capacity)



* 2. How confident are you in your capability distribution estimate?

Not confident

Slightly confident

Moderately confident

Very confident

Extremely confident



* 3. By 2035, how coherent or fragmented do you expect international AI governance to be?

Fully coherent: all major countries adhere to common rules with enforcement mechanisms

Fully fragmented: each major country operates its own competing framework



* 4. How confident are you in your governance coherence estimate?

Not confident

Slightly confident

Moderately confident

Very confident

Extremely confident



* 5. How do you expect each of the following AI futures to affect the stability of the broader international order? Rank from most stabilizing (1) to most destabilizing (4).

Note: For this question, stability means the likelihood of great power conflict, crisis, and systemic disruption — not the preservation of any particular existing order.



Contested Hegemony

Concentrated capability, fragmented governance



Fragmented Multipolarity

Diffused capability, fragmented governance



Regulated Bipolarity

Concentrated capability, coherent governance



Inclusive Governance

Diffused capability, coherent governance

6. Optional: What reasoning underlies your ranking above? We are particularly interested in cases where your answer might surprise us.



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Section 2: Inflection Points

* 1. For each potential event, rate how much it would shift your estimates on each axis if it occurred within the next three years.

	Effect on capability distribution	Effect on governance coherence
A major open-source AI release matches frontier model capabilities		
A serious AI-related accident or security incident with international repercussions		
Military conflict or acute crisis between the U.S. and China		
A binding international AI treaty or governance framework is adopted		
A coalition of Global South states establishes shared AI compute infrastructure and begins training frontier-class models independently of U.S.- and China-aligned technology ecosystems.		
A leading AI lab is nationalized or brought under direct state control		
Large-scale protests or political movements opposing AI on grounds of job displacement, energy costs, or environmental concerns		

2. Are there events not listed above — whether developments within the AI field itself or broader geopolitical, economic, or societal shocks — that you consider equally or more consequential for where we end up by 2035?



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Section 3: Policy Questions

Governance

* 1. How likely is it that, by 2035, a multilateral treaty or convention will be in force that imposes legally binding obligations on signatories regarding the development or deployment of frontier AI systems and includes a verification or enforcement mechanism beyond voluntary reporting (analogous to the IAEA safeguards system)?

Very unlikely	Unlikely	Neither likely nor unlikely	Likely	Very likely
☐	☐	☐	☐	☐

* 2. If a binding multilateral AI governance framework emerges by 2035, which actor or coalition is most likely to have driven it?

- ☐ The United States and close partners
- ☐ The European Union
- ☐ A U.S.-China bilateral agreement
- ☐ A United Nations-led process
- ☐ A coalition of Global South states
- ☐ A private-sector led initiative subsequently adopted by states
- ☐ Other (please specify)

* 3. Who is most likely to set de facto global AI standards by 2035? Standards here refers to norms, rules, and benchmarks governing AI safety, security, transparency and explainability, fairness, accountability, and permissible use.

- ☐ Several powerful states acting individually and unilaterally (e.g. U.S., China)
- ☐ A bloc of states acting collectively (e.g. EU, BRICS, G20)
- ☐ An intergovernmental organization
- ☐ Private firms and frontier labs
- ☐ A hybrid state-private arrangement
- ☐ No single actor — standards will remain fragmented
- ☐ Other (please specify)

Great Power Competition

* 4. Does the current trajectory of AI development make U.S.-China relations more or less stable over the next decade?

Much less stable	Less stable	Neither more nor less stable	More stable	Much more stable
☐	☐	☐	☐	☐

* 5. Which best describes the frontier AI landscape most likely by 2035?

- ☐ U.S.-China duopoly with a substantial gap over all other actors
- ☐ U.S.-China duopoly with several near-peer state competitors
- ☐ Genuine multipolarity — 5+ actors at or near the frontier
- ☐ U.S. dominance — China falls significantly behind
- ☐ China dominance — U.S. falls significantly behind
- ☐ Other (please specify)

State vs. Non-State

* 6. By 2035, will non-state actors have more or less leverage-independent economic, political, military power or some combination of all three-relative to states as a result of AI? Consider non-state actors broadly, including firms, civil society organizations, armed groups, and criminal networks.

Much less leverage	Less leverage	Neither more nor less leverage	More leverage	Much more leverage
☐	☐	☐	☐	☐

* 7. Which type of non-state actor is most likely to gain the most leverage from AI by 2035?

- ☐ Frontier AI labs and large technology firms
- ☐ Armed non-state groups and militant organizations
- ☐ Civil society, advocacy networks, epistemic communities
- ☐ Criminal and illicit networks
- ☐ Other (please specify)

Economic Order

* 8. How do you expect AI-driven productivity gains to be distributed globally by 2035?

- ☐ Concentrated among a small number of private actors, regardless of geography
- ☐ Concentrated among advanced economies, deepening existing inequalities
- ☐ Unevenly distributed, with some Global South regions capturing significant gains while others fall further behind
- ☐ Broadly distributed across both advanced and developing economies
- ☐ Primarily captured by Global South economies, which leverage AI for accelerated development
- ☐ Other (please specify)

9. Optional: Which regions and/or sectors of the economy do you expect to be most affected, positively or negatively?

* 10. If new development pathways do emerge for the Global South, what is the most likely mechanism? Select the single most likely mechanism, even if you think multiple factors will play a role.

- ☐ AI becomes a general-purpose technology accessible at low cost, enabling leapfrogging
- ☐ Emerging economies successfully play major AI powers off each other, gaining favorable terms
- ☐ Advanced economies and frontier labs share benefits deliberately through aid, licensing, or partnership
- ☐ Global South actors build significant autonomous AI infrastructure, reducing dependency

Escalation & Stability

* 11. Does AI integration into military systems make great power conflict more or less likely by 2035?

Much less likely Less likely Neither more nor less likely More likely Much more likely

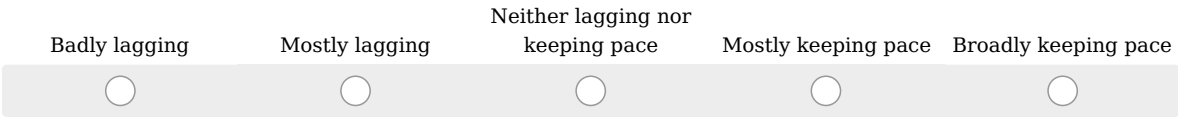
☐☐☐☐☐

* 12. What is the greatest source of AI-related escalation risk, including miscalculation, crisis instability, or conflict expansion? Rank the greatest source of risk at the top and lowest at the bottom.

- Autonomous weapons acting without adequate human control
- AI-accelerated intelligence and cyberattack capabilities
- Misinterpretation of AI-generated signals during a crisis
- Competitive pressure producing reckless deployment decisions

Institutional Adaptation

* 13. By 2035, how well will domestic institutions in different countries (regulatory bodies, courts, civic infrastructure) have kept pace with AI capabilities?



* 14. Where is the institutional adaptation gap most likely to generate social and/or political instability?

- Democratic backsliding driven by AI-enabled surveillance or disinformation
- Judicial and legal systems unable to adjudicate AI-related harms
- Regulatory capture by frontier AI firms
- Labor market disruption outpacing social protection systems
- Other (please specify)



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Section 4: Respondent Profile

Enables breakdowns by expert community and region. All fields are optional.

1. Primary professional domain

- ☐ AI / computer science research
- ☐ International relations / security studies
- ☐ Governance / international law
- ☐ Economics / development
- ☐ Civil society / advocacy
- ☐ Government or multilateral organization
- ☐ Other

2. Primary geographic base

- ☐ North America
- ☐ Europe
- ☐ East Asia / Pacific
- ☐ South / Southeast Asia
- ☐ Middle East / North Africa
- ☐ Sub-Saharan Africa
- ☐ Latin America / Caribbean
- ☐ Other / global

3. Primary sector

- ☐ Academia / research institution
- ☐ Government (national)
- ☐ Multilateral / international organization
- ☐ Private sector (AI lab or infrastructure)
- ☐ Private sector (other)
- ☐ Civil society / NGO
- ☐ Think tank / policy institute
- ☐ Other

4. Self-assessed familiarity (1 = limited · 5 = deep expertise)

	1	2	3	4	5
AI technical developments	☐	☐	☐	☐	☐
International relations / global governance	☐	☐	☐	☐	☐

5. How frequently do you use large language models (e.g., ChatGPT, Claude, Gemini) in your professional life?

- ☐ Daily
- ☐ Several times a week
- ☐ Occasionally
- ☐ Rarely or never

6. How frequently do you use large language models (e.g., ChatGPT, Claude, Gemini) in your personal life?

- ☐ Daily
- ☐ Several times a week
- ☐ Occasionally
- ☐ Rarely or never

7. Age

- ☐ Under 35
- ☐ 35-49
- ☐ 50-64
- ☐ 65 and older
- ☐ Prefer not to say

8. Gender

- ☐ Female
- ☐ Male
- ☐ Other
- ☐ Prefer not to say