



LOWY INSTITUTE
ASIA POWER INDEX
2019

KEY FINDINGS

EMBARGOED UNTIL 12.01AM AEST WEDNESDAY, 29 MAY 2019

PUBLISHED BY LOWY INSTITUTE

Level 3, 1 Bligh Street
Sydney NSW 2000

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Analysis by Hervé Lemahieu

Researchers: Hervé Lemahieu and Bonnie Bley

The principal researchers would like to thank the critical research, review and editorial contributions of Olivia Adams, Anthony Bubalo, Michael Fullilove, Harriet Goers, Euan Graham, Alex Oliver, Lydia Papandrea and Roland Rajah on this project.

The Lowy Institute Asia Power Index is supported by the Lowy Institute's Engaging Asia Project, which was established with the financial support of the Australian Government.

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ISBN 978-0-6480189-3-3 (PRINT)

ISBN 978-0-6480189-4-0 (PDF)

Cover and internal design by Ingrid Schroder, Be Visual Co

Printed and bound in Australia by Megacolour

INTRODUCTION

Global wealth and power are shifting eastwards.

Three of the world's four largest economies are in Asia, and the fourth, the United States, is a Pacific power. By 2025, two-thirds of the world's population will live in Asia, compared with just over a tenth in the West.

Asia's economic transformation is reshaping the global distribution of power. Just as significantly, tensions between powers in the region will define war and peace in the twenty-first century.

The Lowy Institute Asia Power Index is an analytical tool to track changes in the distribution of power in the region. It aims to sharpen the debate on geopolitics in Asia.

The Index ranks 25 countries and territories in terms of their capacity to influence regional events — reaching as far west as Pakistan, as far north as Russia, and as far into the Pacific as Australia, New Zealand and the United States.

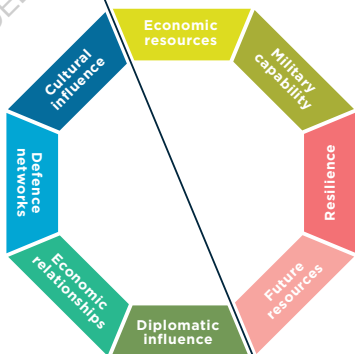
The project evaluates state power through 126 indicators across eight thematic measures: military capability and defence networks, economic resources and relationships, diplomatic and cultural influence, as well as resilience and future resources.

This 2019 edition of the Index includes a fully updated dataset and tracks annual ranking changes and score trends for each country. Subsequent annual editions of the Index will continue to assess shifts in the distribution in power over time.

Power can be measured in two main ways. The Index distinguishes between resource measures that look at what countries have, and influence measures that assess what countries do with what they have.

RESOURCE MEASURES

The first four measures of the Index — *economic resources, military capability, resilience and future trends* — provide assessments of a country's capabilities and resources, which are prerequisite factors in the exercise of power.



INFLUENCE MEASURES

The other four measures of the Index — *diplomatic influence, economic relationships, defence networks and cultural influence* — assess a country's active levels of influence, principally in Asia, lending the Index its geographical focus.

For the purposes of this Index, power is defined as the capacity of a state or territory to direct or influence the behaviour of other states, non-state actors, and the course of international events. At its most rudimentary, power is the capacity to impose costs and confer benefits that shape the choices of other states.

A country's overall power is its weighted average across eight thematic measures of power:



ECONOMIC RESOURCES

Core economic strength and the attributes of an economy with the most geopolitical relevance; measured in terms of GDP at purchasing power parity, international leverage, technological sophistication and global connectivity.



MILITARY CAPABILITY

Conventional military strength; measured in terms of defence spending, armed forces and organisation, weapons and platforms, signature capabilities and Asian military posture.



RESILIENCE

The capacity to deter real or potential external threats to state stability; measured in terms of internal institutional stability, resource security, geoeconomic security, geopolitical security and nuclear deterrence.



FUTURE RESOURCES

The projected distribution of future resources and capabilities, which play into perceptions of power today; measured in terms of estimated economic, defence and broad resources in 2030, as well as working-age population forecasts for 2045.



DIPLOMATIC INFLUENCE

The extent and standing of a state's foreign relations; measured in terms of diplomatic networks, involvement in multilateral institutions and clubs, and overall foreign policy and strategic ambition.



ECONOMIC RELATIONSHIPS

The capacity to exercise influence and leverage through economic interdependencies; measured in terms of trade relations, investment ties and economic diplomacy.



DEFENCE NETWORKS

Defence partnerships that act as force multipliers of autonomous military capability; measured through assessments of alliances, non-allied partnerships and arms transfers.



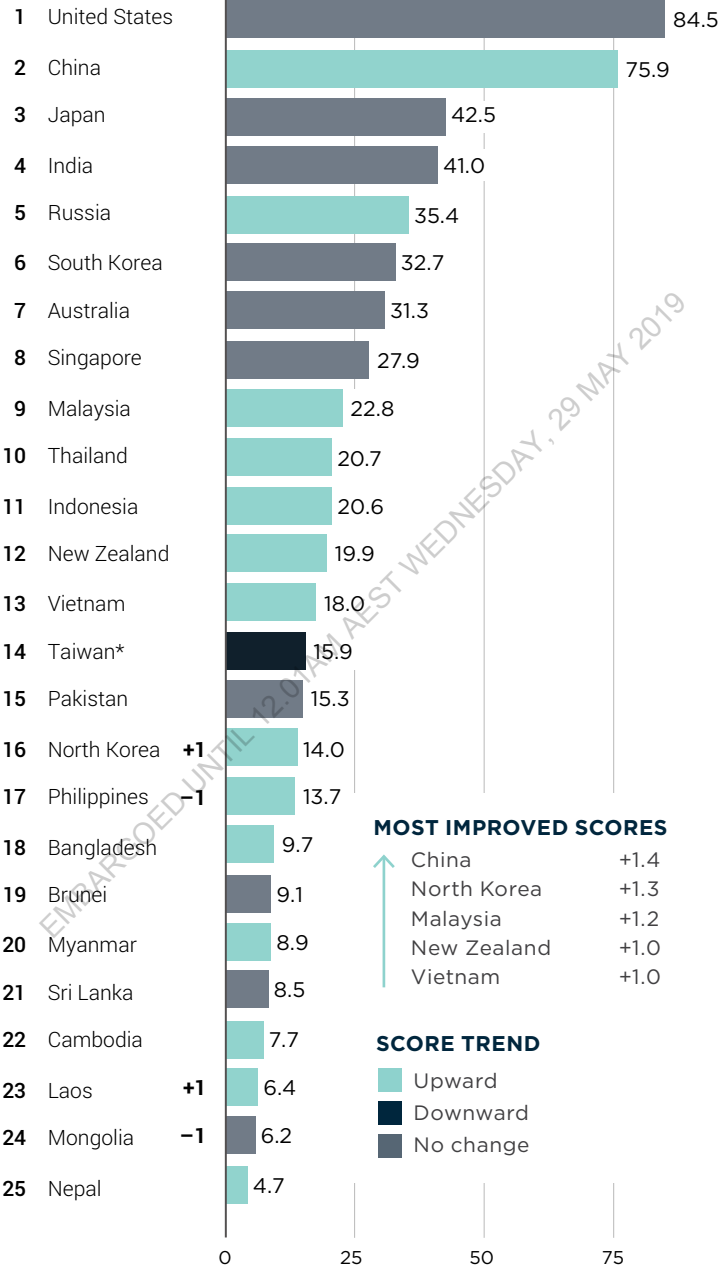
CULTURAL INFLUENCE

The ability to shape international public opinion through cultural appeal and interaction; measured in terms of cultural projection, information flows and people exchanges.

For a detailed account of the conceptual framework of the Index, see 'Measures of Power', pp 168–172.

2019 OVERALL POWER

Rank



Rank	Country / Territory	Score	Trend [†]	
1	United States	84.5	–	Super powers ≥ 70 points
2	China	75.9	↗	
3	Japan	42.5	–	Major powers ≥ 40 points
4	India	41.0	–	
5	Russia	35.4	↗	
6	South Korea	32.7	–	
7	Australia	31.3	–	
8	Singapore	27.9	–	
9	Malaysia	22.8	↗	
10	Thailand	20.7	↗	Middle powers ≥ 10 points
11	Indonesia	20.6	↗	
12	New Zealand	19.9	↗	
13	Vietnam	18.0	↗	
14	Taiwan*	15.9	↘	
15	Pakistan	15.3	–	
16 +1	North Korea	14.0	↗	
17 -1	Philippines	13.7	↗	
18	Bangladesh	9.7	↗	
19	Brunei	9.1	–	
20	Myanmar	8.9	↗	
21	Sri Lanka	8.5	–	Minor powers < 10 points
22	Cambodia	7.7	↗	
23 +1	Laos	6.4	↗	
24 -1	Mongolia	6.2	–	
25	Nepal	4.7	↗	

* Taiwan is included in the Index as a self-governing territory claimed by China

† Trend arrows track changes in scores greater than or equal to 0.5 or less than or equal to –0.5

ANALYSIS OF KEY FINDINGS

Asia's economic transformation is changing the way the region – and indeed the world – works politically and strategically. However, the results of the 2019 Asia Power Index make clear that the balance of power in the Indo-Pacific will be determined by more than the sum of economic resources alone. It is in equal measure a matter of choice, initiative, networks and influence among countries contending with shifting relativities and varying capabilities.

1. The United States remains the pre-eminent power but has become a net underachiever in 2019.

The United States claims the top spot in four of the eight Index measures and its overall power score – the only country to top 80 points – remains unchanged from last year. Yet under most scenarios, short of war, the United States is unlikely to halt the narrowing power differential between itself and China.

Hard and soft qualities of twentieth century US power endure in the early twenty-first century. America is still the dominant military power – reflected in its unmatched *military capability* and the depth of its regional *defence networks* – as well as the most culturally influential power, as the leading study destination and source of foreign media in the region. Combined with strong demographic and geographic fundamentals that contribute to America's *resilience*, these results go some way to dispelling the notion that US power is in absolute decline.

Nevertheless, the United States faces relative decline. A 10-point lead over China in 2018 has narrowed to 8.6 points in 2019. Current US foreign policy may be accelerating this trend. The Trump administration's focus on trade wars and balancing trade flows one country at a time has done little to improve the glaring weakness of US influence, its *economic relationships*. The contradictions between Washington's revisionist economic agenda and its traditional role of providing consensus-based leadership have contributed to its third place ranking, behind Beijing and Tokyo, for *diplomatic influence* in Asia.

This is significant because US diplomatic leadership will have to punch above a declining share of military and economic power to maintain some degree of primacy in Asia. America's second place ranking for *future resources* means it will become increasingly difficult to compete with China unilaterally. A region where globalism matters less than raw heft may offer Washington short-term concessions but would likely favour Beijing, with a more advantageous projected distribution of resources, in the long run.

Despite a first place ranking, the United States has moved from a positive to a negative Power Gap in 2019, indicating it has become less effective at converting its resources into broad-based influence in Asia. Washington has become an underachiever in its ability to wield power. To remain first among equal superpowers, it will need to proactively sustain an environment where the combined strength and interests of its partners and allies are maximised – including by supporting the rules-based trading system that underpins the region's prosperity.

2. The biggest challenger to China's rise is not the United States but itself.

China, the emerging superpower, netted the highest gains in overall power in 2019, with first place rankings in half of the eight Index measures. Last year it led on only three of the eight measures. Despite steady advances, however, Beijing faces political and structural challenges that may make it difficult to establish undisputed primacy in the region.

For the first time, China narrowly edged out the United States in the Index's assessment of *economic resources*. Even with a slowing growth rate, in absolute terms China's economy grew by more than the total size of Australia's economy in 2018. The world's largest trading nation has also paradoxically seen its GDP become less dependent on exports as it shifts to a domestic consumption model. This has enhanced China's *resilience*, making it less vulnerable to escalating trade tensions than most other Asian economies.

Access to Western markets will likely prove increasingly marginal to the global ascendancy of Chinese tech companies. China's upper middle-income consumer base is making large-scale implementation of new technologies such as 5G easier to achieve domestically before being rolled out into other emerging markets. It is significant therefore that Beijing has become the leading source of foreign investment flows into developing economies in the region, even as the United States and Japan remain the largest sources of foreign investment into Asia in the past decade.

China holds a top-two position for *military capability* behind the United States. Long-term political will and defence economics will be deciding factors in the military rivalry between the peer competitors. Beijing has chosen to concentrate its resources and modernisation efforts on its near abroad in contrast to America's global military posture and security commitments. Within its region, China's defence budget is 56% larger than those of all ten ASEAN economies, Japan and India combined.

Yet Beijing's hard power remains hobbled in key respects – not least due to a lack of trust among 11 of its neighbours with whom it has unresolved boundary disputes or legacies of interstate conflict. China's ninth place for *defence networks* – up three places from 2018 – still constitutes its weakest performance across the measures of power. As the People's Liberation Army's presence in contested spaces grows, so are efforts by other powers to create a military and strategic counterweight in response.

China's economic soft power is reflected in a 30-point lead in *economic relationships*. However, it is unclear whether outbound lending is translating into broader influence or leverage for Beijing, or indeed whether it can be sustained at current levels. President Xi Jinping's flagship Belt and Road Initiative faces growing degrees of opposition. In many cases – from Malaysia to Myanmar – this has resulted in renegotiations resolved in favour of the borrower.

Overall Beijing is showing signs it is adapting to external challenges and becoming more adept at wielding a growing share of power in the region. While still a net underachiever, China has improved its negative Power Gap score in 2019. Yet significant internal hurdles remain: China's workforce is projected to decline by 158 million people from current levels in less than 30 years. This likely presages societal and economic challenges. By mid-century, China's total population will also be approximately 20% smaller than that of India, a growing potential regional rival.

3. Japan has become the leader of the liberal order in Asia, while India will not be the next China.

There is often a temptation to reduce the complexity of Asia's international order to a two player game between the United States and China. In reality the Indo-Pacific ecosystem is created and sustained by a much wider array of actors. Japan and India, the third and fourth ranked powers, fall within two points of each other and occupy a distinct tier ahead of the most sizeable middle powers.

India and Japan are separated by oceans, distinct geopolitical contests and legacies, and vast demographic differentials representing young and old Asia. However, both major powers must contend with fading US strategic predominance and the sharpening ambition of China. Each is helping at the margins to adapt the broader regional order to contemporary realities.

Japan is the quintessential smart power, using the country's limited resources to wield a top-four ranking across the four influence measures. It finishes in the top two, only six points behind China, for *diplomatic influence*. Setting regional standards and maintaining an inclusive multilateral architecture has become a key organising principle under the premiership of Shinzo Abe. Tokyo successfully resuscitated the Trans-Pacific Partnership (TPP) in 2018, which became the TPP-11 together with ten other economies minus the United States.

Japan has also proven a capable rival to China for infrastructure investment in South and Southeast Asia. It has used its economic diplomacy to offer Washington alternatives to the Belt and Road Initiative and ease developing countries' dependence on Chinese lending. Over the past decade, Japan has been the dominant foreign investor in strategically pivotal countries as varied as Mongolia, Myanmar, the Philippines and Thailand.

Whereas Japan is an overachiever in long-term decline, India is an underachiever relative to both its size and potential. Despite Prime Minister Narendra Modi's Act East Policy, and a strong top-four showing across the resource measures, New Delhi trails in sixth and eighth place for *economic relationships* and *defence networks*, and is down two places in *diplomatic influence* in 2019.

What India lacks in influence it makes up for in scale. The opposite holds true for Japan. Whereas India is ranked fourth for its *military capability* Japan has ceded ground and dropped from sixth to seventh place for *military capability*. India's economy is predicted to double in size and reach approximate parity

with the United States by 2030. In the same time frame, Japan will have fallen behind Indonesia, currently the sixth-largest economy regionally.

In this sense the major powers offer each other complementary strengths and weaknesses, which creates a ripe basis for enhanced cooperation. Tokyo has cultivated strategic ties with New Delhi, now firmly enshrined in Japan's Indo-Pacific concept. Yet as unlikely bedfellows, it remains to be seen how the countries will work together. Unlike Japan which operates within a US-dominated alliance system, India will continue to cherish its strategic autonomy. Their respective cases of China pushback are likely to be diverse in scope and specifics, and reflect varying national interest calculations and negotiating leverage.

Moreover, while India is the only country with demographic scale to match China, it will not be the next China. New Delhi lacks the control over the allocation of *economic resources*, which has been intrinsic to Beijing's power and largesse. India's rise as a superpower is unlikely to be linear and needs to be understood on its own terms. However, as the economic giant grows in uneven and incremental steps, so too will its ambitions.

4. North Korea's high-stakes power game pays off in 2019 but is far from complete.

A diverse set of middle powers have made gains in their overall power in 2019. North Korea overtook the Philippines, now relegated to 17th place, registering the largest increase in its overall power score after China. The nuclear power jumped five rankings in *diplomatic influence*, albeit starting from a low 21st place, in the year following the first-ever meeting between the leaders of North Korea and the United States.

Summit diplomacy in Singapore and Vietnam – ostensibly on equal terms with the United States – has elevated and partly normalised North Korea's regional standing and ties. The possibility of the country's either wholesale or partial integration into the regional economy through a relaxation in the international sanctions regime – or its enforcement – have improved its future prospects. However, Pyongyang remains a brittle power preoccupied by its survival. The risk of a lapse into further crises is high.

In a dynamic and rapidly growing part of the world, North Korea's economy is estimated to be smaller than that of Laos, a landlocked country with a quarter of its population. Pyongyang's nuclear weapons and intercontinental ballistic missile capabilities are one of the few credible sources of leverage it has to compete with larger powers. This raises questions about what can realistically be achieved on denuclearisation. North Korea likely also views its nuclear card as a potential means of decoupling the United States from its East Asian allies, Japan and South Korea. The country has moved up one ranking in *military capability*, with the sixth most powerful conventional military force in Asia. Only China and India have larger standing armies. The outcome is likely to be an unstable and asymmetric nuclear deterrence relationship with the United States. One that feeds into wider uncertainties about the future viability of the US alliance system in East Asia.

If the risk of renewed conflict on the Korean Peninsula has receded it is in large part due to the creative diplomacy of South Korea's President Moon Jae-in. The larger, more democratic and prosperous Korea has moved up two places to fourth for *diplomatic influence*. However, the suspension of joint military training exercises on the Korean Peninsula announced by the United States as a concession to North Korea in 2018 has also seen South Korea drop one ranking for the depth of its alliance under *defence networks*.

5. Malaysia, Vietnam and New Zealand are the most improved middle powers after North Korea. Australia's power is flat while Taiwan's is down.

The power of leaders to shape their countries' foreign policy is reaffirmed in ninth-placing Malaysia's strong performance following the surprise return to office of 93-year-old Prime Minister Mahathir Mohamad in 2018. Malaysia's stature has diminished since the heyday of the first Mahathir premiership two decades ago. The Asian tiger has fallen one place for *economic resources* in 2019 faced with the growth of neighbouring economies. Yet despite these structural constraints, Malaysia has fared better in the last year across the Index's influence measures, where it has resumed its standing among the top ten most diplomatically influential powers in Asia and trended upwards for defence diplomacy.

Kuala Lumpur's external policy under Mahathir 2.0 has explicitly been refocused on the geoeconomic security, *resilience* and bargaining power of Southeast Asian states faced with great power rivalry and turbulence in the Trump–Xi era. Mahathir has succeeded in obtaining more favourable terms for foreign-funded infrastructure projects – notably a major Chinese funded rail project linking Kuala Lumpur to southern Thailand – while maintaining close ties to Beijing.

New Zealand's improvement in *diplomatic influence* to 11th place in 2019 is largely due to the role of Prime Minister Jacinda Ardern, ranked fourth among leaders in the region in terms of ability to advance her country's diplomatic interests globally. By contrast, Australia saw its ranking for *diplomatic influence* in the region drop to eighth place behind Indonesia following political infighting and a leadership change in 2018. The larger of the two Pacific powers has suffered a remarkable turnover of foreign policymakers, including five prime ministers in six years. This has affected Australian leaders' ability to form lasting partnerships with their counterparts.

Nevertheless, both antipodean powers benefit from strong and improving fundamentals. Canberra and Wellington saw their rankings move up in *economic relationships* with the TPP-11 coming into force in late 2018. Despite concerns about the growing economic presence of China in the South Pacific, Australia and New Zealand retain the most favourable strategic geography in the region – surrounded as they are by friends and fish. This has helped contribute to the countries' fifth and sixth places respectively for *resilience*.

The same cannot be said of Vietnam or Taiwan whose geographies in contested waters south of China play into their strategic vulnerability. The middle powers share similar predicaments but are moving in opposite directions. Ranked 13th for overall power, Vietnam has made rapid progress in strategic and economic spheres. In 2019, the country eclipsed Taiwan in *military capability*. Assessments of Vietnam's ability to deploy and sustain ground and naval forces in an interstate conflict have improved by three rankings to eighth place. Hanoi has also made the most of multilateral arrangements – such as the TPP-11 and ASEAN – to boost its economic diplomacy and regional trade ties. Current trend projections place it tenth for *future resources*.

By contrast, Taiwan has become the only middle power in the Index to register a significant downward shift in overall power score from 2018. The island – ranked 14th for overall power – remains of central, strategic importance to the regional balance of power. Backed by the United States, it presents a formidable check on China's aspirations to become a fully fledged sea power. Taipei's fall in power betrays its geopolitical significance but reflects its position as a political outsider.

ASEAN centrality – and the big-tent diplomacy convened around it – is often dismissed as an inadequate and anachronistic mechanism for managing the growing vicissitudes of great power politics in Asia. However, Taiwan's isolation from the very same multilateral forums proves that regionalism still carries substantial geostrategic benefits for those inside it. Eight of ten ASEAN countries registered upward trends in their overall power score in 2019.

MEASURE RANKINGS



ECONOMIC RESOURCES

Rank		Country / Territory	Score	Trend [†]
1	+1	China	93.0	↗
2	-1	United States	92.5	↘
3		Japan	34.3	—
4		India	24.4	—
5		South Korea	18.6	—
6		Russia	17.2	—
7		Singapore	16.6	—
8		Taiwan*	14.4	↗
9		Australia	12.5	—
10		Indonesia	8.7	—
=11	+1	Thailand	8.6	↗
=11		Malaysia	8.6	—
13		New Zealand	6.5	—
14		Philippines	5.8	↗
15		Vietnam	5.4	—
16		Bangladesh	3.8	—
17	+1	Brunei	3.6	—
18	-1	Pakistan	3.5	—
19		North Korea	2.9	—
20		Sri Lanka	2.4	—
21	+1	Mongolia	1.7	—
=22	+1	Myanmar	1.5	—
=22	-1	Nepal	1.5	—
24		Laos	0.9	—
25		Cambodia	0.3	—

* Taiwan is included in the Index as a self-governing territory claimed by China

† Trend arrows track changes in scores greater than or equal to 0.5 or less than or equal to -0.5



MILITARY CAPABILITY

Rank		Country / Territory	Score	Trend [†]
1		United States	94.7	—
2		China	66.1	↘
3		Russia	57.2	↗
4		India	44.2	—
5		South Korea	32.9	—
6	+1	North Korea	30.6	↗
7	-1	Japan	29.5	↘
8		Australia	28.2	↗
9		Pakistan	25.8	—
10		Singapore	25.2	—
11	+1	Vietnam	20.7	↗
12	-1	Taiwan*	20.2	↘
13		Indonesia	16.8	↗
14	+1	Thailand	13.8	↗
15	-1	New Zealand	13.1	↗
16		Malaysia	12.0	↗
17		Myanmar	11.7	↗
18		Sri Lanka	7.7	↗
19		Philippines	6.4	↗
20		Bangladesh	5.8	↗
21		Mongolia	4.1	↗
22	+3	Nepal	3.4	↗
23	-1	Brunei	3.0	—
24	-1	Cambodia	2.8	↗
25	-1	Laos	0.6	—

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RESILIENCE

Rank		Country / Territory	Score	Trend [†]
1		United States	85.3	—
2		Russia	79.7	↗
3		China	70.5	—
4		India	54.4	—
5		Australia	47.7	↘
6		New Zealand	45.6	↘
7		Japan	37.1	↘
8		Indonesia	36.4	↘
9		Malaysia	36.2	—
10		North Korea	35.9	↘
11		South Korea	35.8	—
12		Thailand	33.5	—
13		Singapore	31.6	↘
14		Taiwan*	30.8	↘
15		Brunei	28.8	—
16		Sri Lanka	26.9	↘
17		Pakistan	26.4	↘
18		Bangladesh	26.3	↘
19		Vietnam	24.8	↘
20		Philippines	22.7	—
21	+1	Laos	22.3	↗
22	+3	Cambodia	20.7	↗
23	-2	Mongolia	18.8	↘
24	-1	Myanmar	17.4	—
25	-1	Nepal	14.2	↘

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† Trend arrows track changes in scores greater than or equal to 0.5 or less than or equal to -0.5



FUTURE RESOURCES

Rank		Country / Territory	Score	Trend [†]
1		China	85.6	↗
2		United States	78.5	—
3		India	54.1	↘
4		Russia	18.8	↗
5		Indonesia	12.8	↘
6	+1	Japan	11.3	—
7	-1	Pakistan	10.9	↘
8		South Korea	10.7	—
9		Australia	9.6	—
10		Vietnam	7.4	—
11	+1	Singapore	7.0	—
12	-1	Malaysia	6.6	—
=13	+4	North Korea	5.6	↗
=13		Taiwan*	5.6	—
15	-1	Philippines	5.3	—
16		Thailand	5.1	—
17	-2	Bangladesh	4.9	—
18		Myanmar	4.3	—
19		New Zealand	3.3	—
20		Sri Lanka	2.8	↘
21		Mongolia	2.7	↗
22		Laos	1.8	—
=23	+1	Cambodia	1.6	—
=23		Brunei	1.6	—
25		Nepal	0.4	—

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† Trend arrows track changes in scores greater than or equal to 0.5 or less than or equal to -0.5



DIPLOMATIC INFLUENCE

Rank		Country / Territory	Score	Trend [†]
1		China	96.2	↗
2		Japan	90.9	↗
3		United States	79.6	↗
4	+2	South Korea	69.7	↗
5		Russia	68.7	↗
6	-2	India	68.5	↘
7	+2	Indonesia	57.5	↗
8	-1	Australia	56.9	↘
9	-1	Singapore	54.3	↘
10	+1	Malaysia	52.3	↗
11	+1	New Zealand	48.0	↗
12	-2	Vietnam	46.4	↗
13		Thailand	44.1	↗
14		Philippines	34.6	↗
15		Pakistan	32.2	↗
16	+5	North Korea	29.6	↗
17	+2	Sri Lanka	26.6	↗
18	-2	Bangladesh	26.4	↗
19	-2	Brunei	23.0	↘
20	-2	Cambodia	22.7	↘
21	-1	Myanmar	21.8	↘
22		Laos	20.7	↗
23	+1	Mongolia	17.4	↗
24	-1	Taiwan*	14.8	↘
25		Nepal	12.8	↗

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† Trend arrows track changes in scores greater than or equal to 0.5 or less than or equal to -0.5



ECONOMIC RELATIONSHIPS

Rank		Country / Territory	Score	Trend [†]
1		China	97.5	↗
2		United States	67.6	—
3		Japan	52.7	↘
4		Singapore	29.7	↗
5		South Korea	27.4	↘
6		India	26.5	↘
7		Malaysia	22.1	—
8	+1	Australia	21.6	↗
9	-1	Thailand	21.1	—
10		Vietnam	16.0	↗
11	+1	New Zealand	12.4	↗
12	-1	Indonesia	11.4	—
13		Taiwan*	10.8	—
14	+1	Philippines	9.7	—
15	-1	Russia	9.6	—
16		Brunei	9.2	↗
=17		Myanmar	7.0	—
=17	+1	Cambodia	7.0	—
19		Laos	6.6	—
20		Pakistan	4.4	—
21		Sri Lanka	2.9	—
22		Mongolia	1.2	—
23		Bangladesh	1.0	—
24		Nepal	0.5	—
25		North Korea	0.0	—

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† Trend arrows track changes in scores greater than or equal to 0.5 or less than or equal to -0.5



DEFENCE NETWORKS

Rank		Country / Territory	Score	Trend [†]
1		United States	86.0	↗
2		Australia	69.0	—
3		South Korea	46.0	↘
4		Japan	44.9	↗
5		Singapore	40.6	—
6		New Zealand	39.2	—
7		Malaysia	30.8	↗
8		India	24.5	↗
9	+3	China	24.1	↗
10	-1	Thailand	23.7	↗
11	-1	Philippines	23.5	↗
12	-1	Russia	21.7	↘
13		Indonesia	19.2	↗
14		Pakistan	16.3	—
15		Taiwan*	15.4	↗
16		Vietnam	12.2	—
17	+1	Bangladesh	10.7	↗
18	+1	Cambodia	9.8	↗
19	-2	Mongolia	9.4	↗
20	+1	Brunei	8.8	↗
21	-1	North Korea	8.5	—
22		Nepal	6.0	↗
23		Myanmar	2.8	—
24		Laos	2.5	—
25		Sri Lanka	1.8	↗

* Taiwan is included in the Index as a self-governing territory claimed by China

† Trend arrows track changes in scores greater than or equal to 0.5 or less than or equal to -0.5



CULTURAL INFLUENCE

Rank		Country / Territory	Score	Trend [†]
1		United States	86.7	↘
2		China	58.3	↗
3		Japan	50.4	↗
4		India	49.0	↗
5		South Korea	33.8	↘
6		Malaysia	32.7	—
7		Thailand	29.8	—
8		Singapore	27.5	—
9		Australia	26.7	—
10	+1	Russia	20.1	↗
11	-1	Vietnam	19.2	—
12		Indonesia	18.1	—
13		Taiwan*	15.4	—
14		Philippines	15.3	—
15	+1	Bangladesh	10.2	—
16	-1	New Zealand	9.9	—
17	+1	Pakistan	9.5	—
18	-1	Myanmar	9.1	↘
19		Cambodia	6.8	—
20		Sri Lanka	5.4	—
21		Laos	4.5	—
22		Nepal	4.1	—
23		Brunei	3.9	—
=24	+1	Mongolia	1.5	—
=24		North Korea	1.5	↘

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† Trend arrows track changes in scores greater than or equal to 0.5 or less than or equal to -0.5

2019 POWER GAP

The Asia Power Index consists of four resource measures, which look at what countries have, and four influence measures, which look at what countries do with that they have.

The Power Gap provides a secondary analysis to the Index based on the interplay between resources and influence. Countries can be overperformers or underperformers, irrespective of where they place in the rankings.

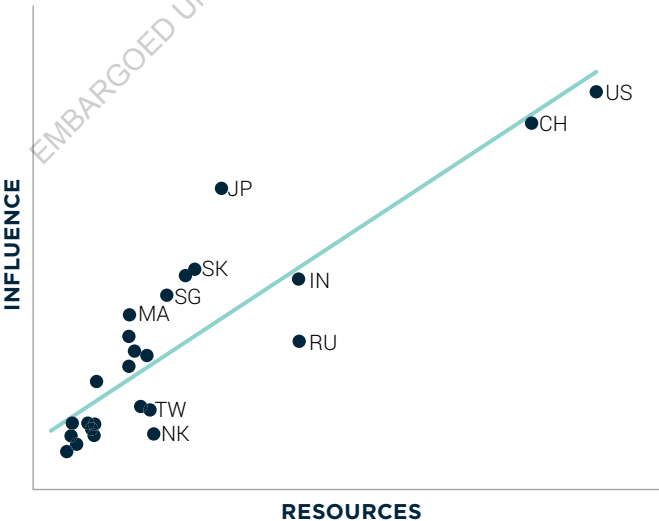
Countries with outsized influence in Asia relative to their resources have a positive Power Gap. Conversely, countries that exert undersized influence relative to their resources register a negative Power Gap.

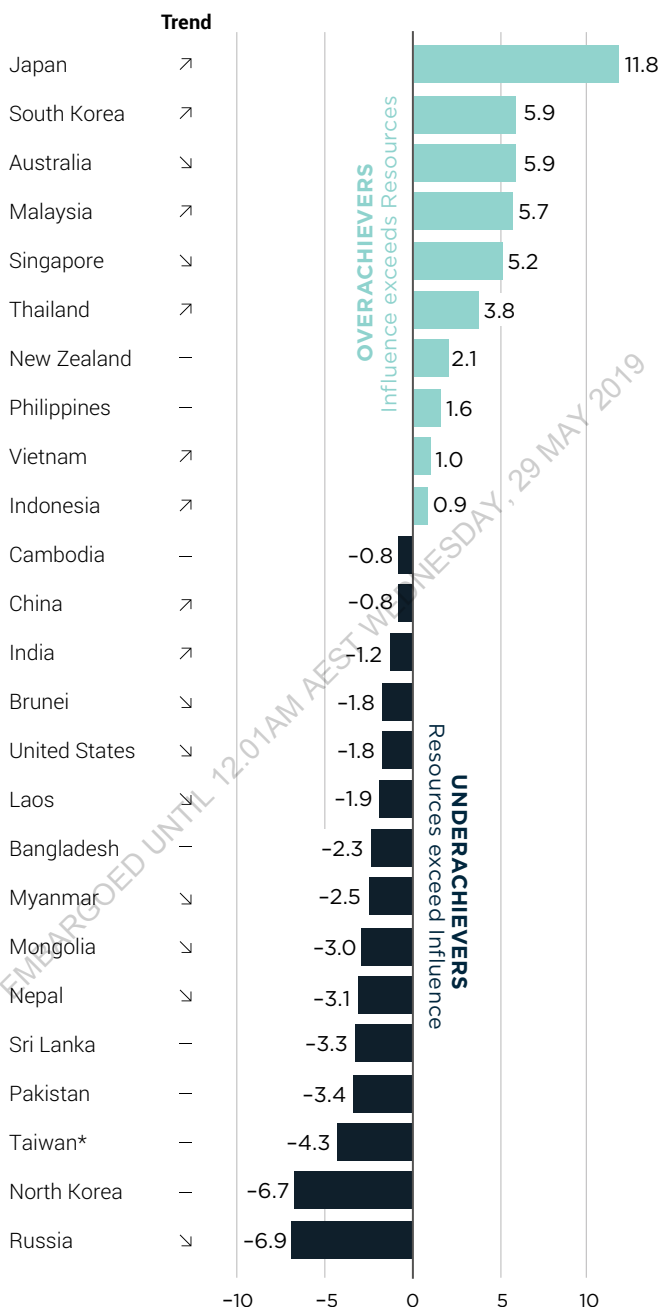
Japan's Power Gap score of 11.8 reveals it to be a quintessential smart power, making efficient use of limited resources to wield broad-based diplomatic, economic and cultural influence in the region. Russia's Power Gap score of -6.9 indicates its influence may be limited by its position on the geographic periphery of Asia.

South Korea, Australia, Malaysia and Singapore have more influence than their raw capabilities would indicate. This points to their ability and willingness to work collaboratively with other countries to pursue their interests. They are highly networked and externally focused.

Developing countries often register influence shortfalls – reflecting their unrealised power potential and internal constraints on their ability to project power abroad. Meanwhile, misfit middle powers – such as North Korea and Taiwan – are geopolitical outcasts that deliver inconsistent performances across the influence measures.

The distance from the trend line – which is determined using a linear regression – reveals how well each country converts its resources into influence in Asia.





A country's Power Gap score is the difference between its overall power and what its power would be expected to be given its available resources.

Asia's economic transformation is reshaping the global distribution of power, with profound implications for war and peace in the twenty-first century.

The Lowy Institute Asia Power Index is the most comprehensive study of power in Asia ever undertaken. It is an analytical tool that ranks 25 countries and territories in terms of what they have, and what they do with what they have – reaching as far west as Pakistan, as far north as Russia, and as far into the Pacific as Australia, New Zealand and the United States.

This 2019 edition of the Index has been expanded to 126 indicators across eight thematic measures of power. It features analysis of key findings, annual rankings and trends, detailed statistical profiles of all 25 countries and territories, and thousands of original data points and findings.



Economic resources



Diplomatic influence



Military capability



Economic relationships



Resilience



Defence networks



Future resources



Cultural influence

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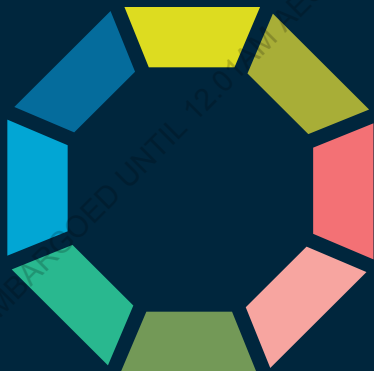
DIGITAL PLATFORM

The Lowy Institute Asia Power Index is available through a specially designed digital platform that maximises both interactivity with the data and transparency of the methodology.

Dynamic features – including an interactive map, weightings calculator, country comparisons and drill-down explorations of each measure – establish the Lowy Institute Asia Power Index as an indispensable research tool for the study of power in Asia.

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The Lowy Institute Asia Power Index is supported by the Lowy Institute's Engaging Asia Project, which was established with the financial support of the Australian Government.

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