LOWY INSTITUTE
ASIA POWER INDEX

2024 KEY FINDINGS REPORT

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Introduction

The annual Asia Power Index — launched by the Lowy Institute in 2018 — measures resources and influence to rank the relative power of states in Asia. The project maps out the existing distribution of power as it stands today, and tracks shifts in the balance of power over time.

The Index ranks 27 countries and territories in terms of their capacity to shape their external environment — its scope 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 2024 edition is the most comprehensive assessment of the changing distribution of power in Asia to date. It includes Timor-Leste for the first time, reflecting its growing importance as a result of likely accession to the Association of Southeast Asian Nations (ASEAN) in future years.

The project evaluates international power in Asia through 131 indicators across eight thematic measures: Military Capability and Defence Networks, Economic Capability and Relationships, Diplomatic and Cultural Influence, as well as Resilience and Future Resources. More than half the data points involve original Lowy Institute research, while the rest are aggregated from hundreds of publicly available national and international sources.

Key findings in 2024

1. **China's plateauing power:** China's power is neither surging nor collapsing. It is plateauing at a level below that of the United States, but still well above any Asian competitors.

2. **Resilient US power:** The United States has buttressed its standing in Asia — though it is losing ground to China on Military Capability.

3. **India rising slowly:** India has overtaken Japan to become the third-ranked power in Asia, but its clout remains below the potential promised by its resources.

4. **Japan is hardening up:** Japan is changing from an economic and cultural powerhouse to one much more active in defence and security cooperation.

5. **Southeast Asian powers on the rise:** Southeast Asia's heavyweights are getting heavier: Indonesia's power has grown more than any other Index country since 2018.

6. **Australia is holding its own:** Australia continues to rise up the Asia Power Index, making it into the top five as others falter, but its own power is just holding steady.

7. **Russia's dwindling relevance:** Russia has slipped down the power rankings to sixth place. Its relevance to Asia is declining as its war on Ukraine saps resources and focus.

8. **Tripolar diplomacy:** While Asia remains a "bipolar" game dominated by two superpowers, when it comes to Diplomatic Influence, power is more widely distributed, and Japan is a leading player.

2024 Rankings

COMPREHENSIVE POWER

UPWARD · DOWNWARD · NO CHANGE

GROUPING	Change	RANK	COUNTRY/TERRITORY	SCORE	TREND
Superpowers ≥ 70 points		1	United States	81.7	↗
		2	China	72.7	↗
Middle powers ≥ 10 points	+1	3	India	39.1	↗
	−1	4	Japan	38.9	↗
	+1	5	Australia	31.9	↗
	−1	6	Russia	31.1	↘
		7	South Korea	31.0	↗
		8	Singapore	26.4	↗
		9	Indonesia	22.3	↗
		10	Thailand	19.8	↗
		11	Malaysia	19.6	↗
		12	Vietnam	18.7	↗
		13	New Zealand	16.3	↘
		14	Taiwan	16.0	↗
	+1	15	Philippines	14.7	↗
	−1	16	Pakistan	14.6	↗
		17	North Korea	11.3	↗
		18	Brunei	10.2	↗
Minor powers < 10 points	+1	19	Cambodia	9.5	↗
	−1	20	Bangladesh	9.4	↗
		21	Sri Lanka	7.7	↗
	+1	22	Laos	7.0	↗
	−1	23	Myanmar	6.7	↘
		24	Mongolia	5.2	↗
		25	Nepal	4.8	↗
		26	Timor-Leste	4.3	NEW
	−1	27	Papua New Guinea	4.2	↗

GREATEST GAINS

Indonesia	+2.9
India	+2.8
Philippines	+2.0

GREATEST LOSSES

Myanmar	−0.8
New Zealand	−0.6
Russia	−0.4

Annual change in ranking

Trends track annual changes in scores above a minimum threshold (≥ 0.15)

The Asia Power Index measures the ability of states to shape and respond to their external environment.

Power is defined by the Index as the capacity of a state to direct or influence the behaviour of other states, non-state actors, and the course of international events.

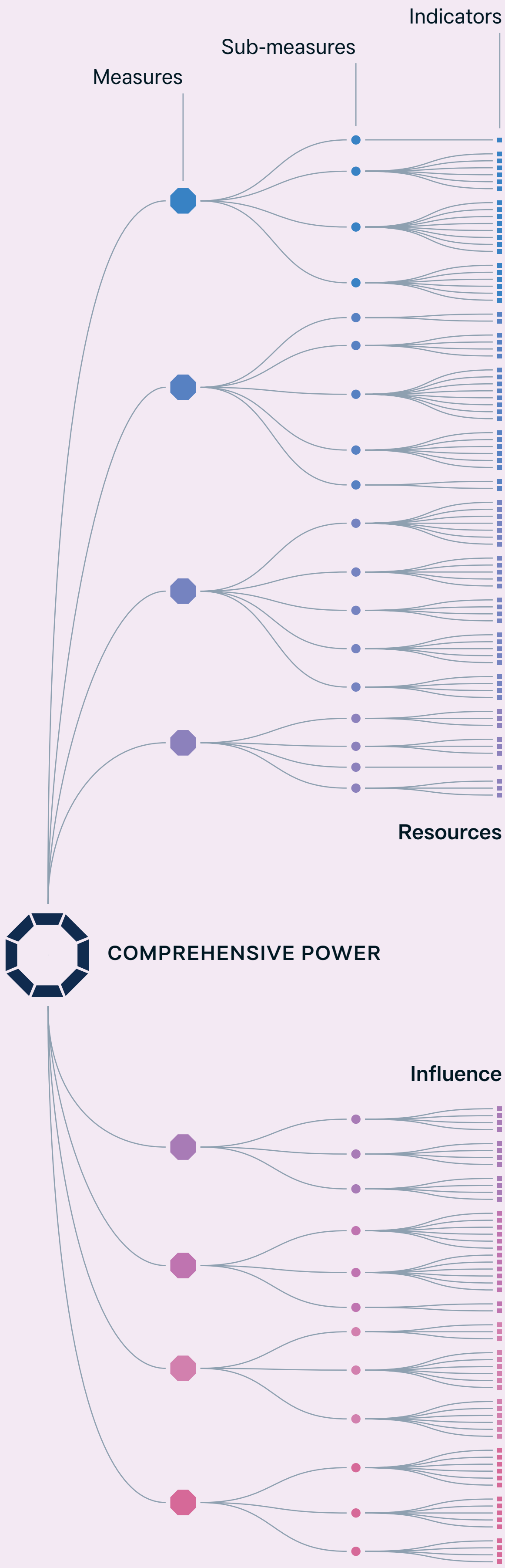
Power can be measured in two ways. The Index distinguishes between resource-based determinants of power — in other words, what countries have — and influence-based determinants of power — what countries do with what they have.

Resources
The first four measures of the Index — Economic Capability, Military Capability, Resilience, and Future Resources — are prerequisite resources and capabilities for exercising power.

Influence
The next four measures — Economic Relationships, Defence Networks, Diplomatic Influence, and Cultural Influence — assess levels of regional influence, lending the Index its geographical focus.

A country's comprehensive power is calculated as a weighted average across the eight measures of power, each of which aggregates data from three to five distinct sub-measures comprising 131 individual indicators.

The Index's measures, sub-measures, and indicators seek to capture the diverse qualities that enable countries to pursue favourable geopolitical outcomes, as well as to shape and respond to their external environment.



Resources

A state or territory's material capabilities and robustness, which are requisite factors in the exercise of power.

Economic Capability

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 2035, as well as working-age population and labour dividend forecasts for 2050.

Influence

A state or territory's active levels of regional influence via economic, diplomatic, defence, and cultural ties.

Economic Relationships

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

Defence Networks

Defence partnerships in Asia that act as force multipliers of autonomous military capability; measured through assessments of alliances, regional defence diplomacy, and arms transfers.

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.

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.

Explore the Asia Power Index online

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, network analysis, country comparisons, and drill-down explorations of each indicator across multiple years and tens of thousands of data points — establish the Lowy Institute Asia Power Index as an indispensable research tool for the study of power globally.

Analysis

Intensifying rivalry: Asia Power Index 2024

The 2024 Asia Power Index shows renewed dynamism in the region, with no less than 11 ranking changes in the table. But power in Asia remains a bipolar game, with the world's two superpowers topping our ranking by a considerable margin. The United States and China appear to be digging in for a long contest. China's power is neither surging nor collapsing, but plateauing. Flatlining Economic Capability, driven by slower economic growth and longer-term structural challenges, means that China's economic clout, while still commanding, is no longer growing.

US staying power and dynamism in Asia, this year as in years prior, has confounded the pessimists. The United States leads China on six out of eight measures in the Asia Power Index. Though on one key metric the US comparative advantage is eroding: China has continually improved its Military Capability and has closed more than a quarter of the lead that the United States held in this measure in 2018. For the first time, experts surveyed for the Asia Power Index judged that China is better able to deploy rapidly and for a sustained period in the event of an interstate conflict in Asia.

A key component of the Biden administration's answer to an eroding US military advantage has been to deepen Washington's Defence Networks with capable regional partners. In 2024, the US–Japan alliance reached new levels of integration and coordination, and the Australia–US alliance continued to grow, including under the auspices of AUKUS. The Biden administration has also shored up ties with South Korea and managed its alliance with the Philippines effectively.

India's power in Asia is growing, overtaking Japan to take third place for its comprehensive power for the first time. However, the gap between the expectation of "India rising" and reality remains pronounced. The Asia Power Index shows that New Delhi still has limited ability to project power and influence east of the Malacca Strait. However, the fact that its influence remains well below the level promised by its resources suggests it still has ample potential for further growth as a major power.

Japan's transformation from an economic and cultural powerhouse to one based also in defence and security engagement with its neighbours is among the key trends identified by the 2024 Asia Power Index. Tokyo has stepped up as a regional security provider — a development exemplified by its signing of a Reciprocal Access Agreement with Manila.

Russia, the "no limits" partner to China, was overtaken by Australia in fifth place in the Asia Power Index rankings. For a second consecutive year, it was among the three countries with the worst declines in comprehensive power in Asia. Moscow has paid a heavy price for its disastrous invasion of Ukraine, which continues to sap focus and resources. President Vladimir Putin's visit to three countries in Asia in 2024 looked more like an effort to shore up dwindling influence than a sign of continued relevance to the region.

Southeast Asia's most populous countries, Indonesia and the Philippines, are becoming more influential. Indonesia's power has grown more than any other since the inception of the Asia Power Index, by 2.9 points in 2024 alone, marking an 11 per cent increase on its 2018 score. The Philippines has overtaken an embattled nuclear power, Pakistan, to reach fifteenth place in the Asia Power Index. Manila's strategy of seeking closer ties with the United States, as well as a broader range of US-aligned partners outside ASEAN, resulted in an increase in its comprehensive power, driven in particular by its strengthened Diplomatic Influence.

Key Findings

1. China's plateauing power

China's power is neither surging nor collapsing. It is plateauing at a level below that of the United States, but still well above any Asian competitors.

Much strategic analysis about China's power in Asia focuses on two extreme scenarios: China eclipsing the United States and becoming an unstoppable regional hegemon; or China "peaking" and failing to sustain a competitive edge.

The 2024 Asia Power Index reveals China's power neither collapsing nor increasing exponentially. Instead, it shows China finding a new "settling point" — with power below that of the United States, but well ahead of any other country in Asia.

Beijing's overall power score increased by just 0.2 points in 2024, a contrast to the majority of Asia Power Index countries, whose scores rebounded more strongly following the Covid-19 pandemic. This weak growth means the gap between China and the United States is the largest it has been since 2018.

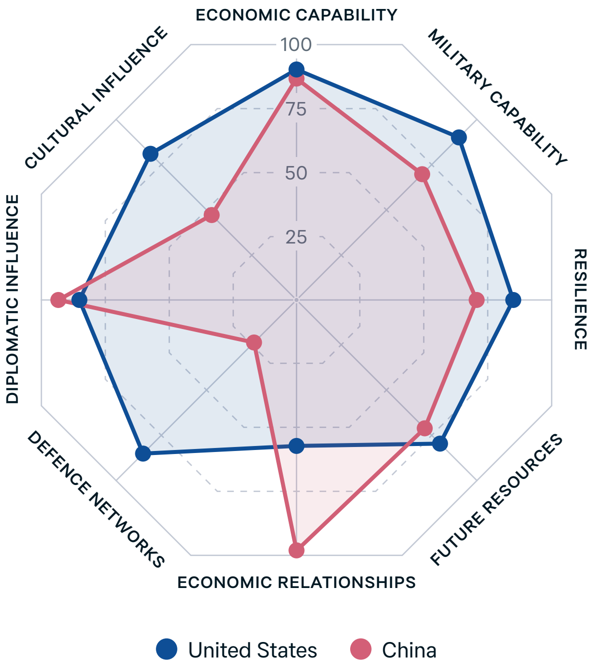
One factor above all is constraining China's power: its Economic Capability is no longer surging. China's score for this measure has declined every year since 2019 and remains below that of the United States. Beijing's lower scores for this measure are driven by slower economic growth and a failure to fully recoup its advantage in terms of connectivity with the world and with Asia following the post-pandemic reopening in 2023.

Relatedly, while China retains a commanding lead in Economic Relationships, the 2024 Asia Power Index shows it is no longer growing in this sphere. China is less dominant in investment ties, mostly due to reduced inbound investment. China is also less dominant in the trade relations sub-measure, accounting for a reduced average share of imports from the 26 other Asia Power Index countries.

While China will remain a dominant economic partner to countries in Asia, this year's Asia Power Index casts doubt on the narrative of continuously surging Chinese economic support and ever-growing investment for the region. Ultimately, China faces too many long-term constraints to live up to this expectation. Its score for Future Resources — a measure projecting the future distribution of economic, military, and demographic resources — has fallen precipitously since 2020.

UNITED STATES — CHINA

Comparative measure scores, 2024



On defence and security, there is more room for growth. China's Military Capability increased slightly as it added more new capabilities than other Index countries. But the People's Liberation Army has enduring deficiencies, especially in terms of long-range power projection. Even so, the 2024 Asia Power Index shows China beating the United States for the first time in the Asian military posture sub-measure, an expert assessment of countries' ability to deploy rapidly and for a sustained period in the event of an interstate conflict in Asia. This finding suggests that although China will not exceed the United States in terms of overall Military Capability for the foreseeable future, that may not be needed to achieve its strategic objectives in East Asia, including with respect to Taiwan and the South China Sea.

Despite new efforts to provide security assistance to partners in Asia, Defence Networks remain an enduring disadvantage for China — it is ranked 7th for this measure and trending down in the face of much increased US security cooperation. Security assistance — such as working with Cambodia to develop the Ream Naval Base — may be more cost-effective for China to pursue and better suited to its tighter fiscal environment than large-scale infrastructure projects.

Yet the 2024 Asia Power Index suggests that China has no easy pathway to establish itself at the centre of regional security networks.

China retains a lead for Diplomatic Influence in Asia, reflecting its consistent high tempo of diplomacy with a wide range of countries — a contrast to the United States, which continues to focus on a narrower set of allies and like-minded partners.

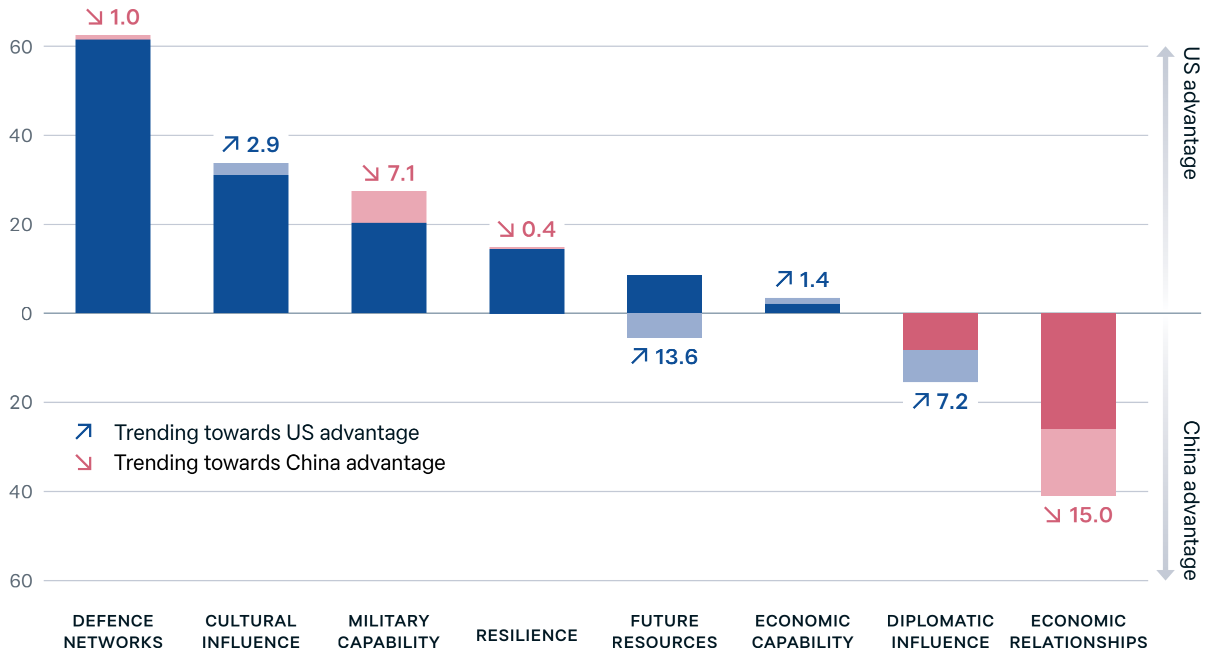
2. Resilient US power

The United States has buttressed its standing in Asia — though it is losing ground to China on Military Capability.

The 2024 Asia Power Index shows the enduring strength of the United States. The United States leads on all measures in the Index except Economic Relationships (where China is dominant) and Diplomatic Influence (where Japan, the United States, and China all vie for leadership). Its lead over China is the largest since 2018.

COMPARATIVE ADVANTAGE

Net change in US-China measure scores, 2018–2024



The strength and dynamism of the US economy underpins much of its success, with the country leading the Index for Economic Capability for the second year in a row. The United States also continues to score highly for Future Resources, reflecting its more favourable demography, and for Resilience, highlighting its size and both geopolitical and geoeconomic security.

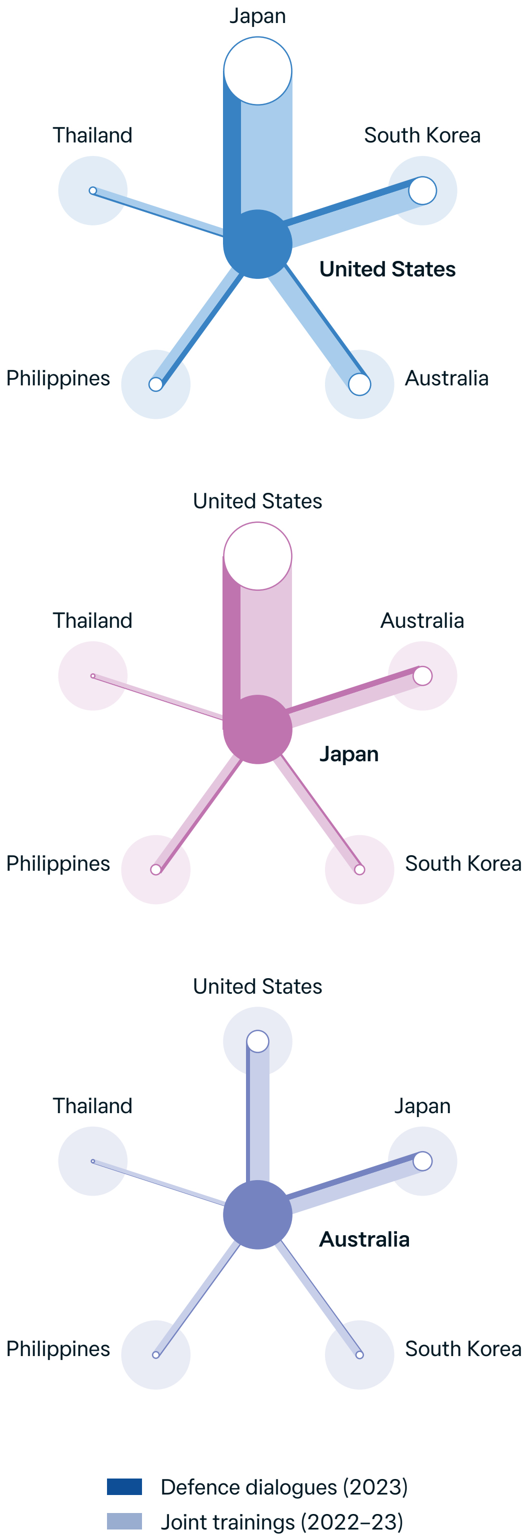
Despite the picture of resilience in overall US power, in two areas the United States has lost ground to China over the past six years. On Military Capability, the US advantage has fallen from 27 points in 2018 to 20 points in this year's Index. And on Economic Relationships, an area of Chinese advantage, the US deficit to China has widened from 26 points in 2018 to 41 points in 2024. The United States slightly increased its score for Economic Relationships in 2024, driven by a small uptick in investment in Asia.

The 2024 Asia Power Index casts light on the way in which the United States is effectively exploiting its position at the centre of a network of regional defence partnerships. Since 2018, China has eroded just one point of a 62-point US advantage in the Defence Networks measure. Within Defence Networks, however, Washington's effort remains highly concentrated on its allies in the region, especially Japan. Of nearly 500 combined training activities conducted with its allies over a two-year period (2022–23), more than 330 involved Japan. By contrast, the United States participated in just over 200 activities with all non-allied partners in Asia. A similar disparity exists in the pattern of defence dialogues held — with the United States devoting approximately 70 per cent of its effort to dialogues with its treaty allies.

Yet, despite these strengths, doubts over US reliability and predictability persist in Asia. The region now faces the prospect of a second Trump administration. During Donald Trump's presidency, between 2017 and 2021, the Asia Power Index showed a gulf in Diplomatic Influence, with China far outstripping the United States. That gap was closed during an initial "honeymoon" period for the Biden administration in 2021, and then stabilised with a small diplomatic advantage to China. Under a second Trump presidency, it is likely that a similar gap would re-emerge. The overall impact of this on US power in Asia would be limited, however,

ALLIANCE NETWORKING

Defence dialogues and joint exercises between US allies



unless it were also combined with the United States stepping back from regional defence partnerships or taking radically new protectionist measures aimed at the region rather than more narrowly at China.

The more positive perspective is that the 2024 Asia Power Index provides evidence that the "latticework of cooperation" advocated by US National Security Adviser Jake Sullivan and other Biden administration officials is becoming a tangible reality. Across three indicators — defence dialogues, combined exercises, and diplomatic dialogues — it is clear that Japan is emerging as a defence diplomacy hub in its own right. This may provide a degree of ballast to the regional security architecture, regardless of the outcome of the November 2024 US presidential election.

3. India rising slowly

India has overtaken Japan to become the third-ranked power in Asia, but its clout remains below the potential promised by its resources.

Since 2018, the Asia Power Index has called into question the narrative of India's rise in Asia. Contrary to many expectations, India's overall power score decreased from 2018 to 2023.

The 2024 Asia Power Index finally sees a reversal of fortune for India, with it narrowly surpassing Japan to now rank 3rd for overall power in Asia.

India's great strength in Asia is the resources it brings from its huge population, landmass, and economy — already the world's third-largest in terms of purchasing power parity (PPP).

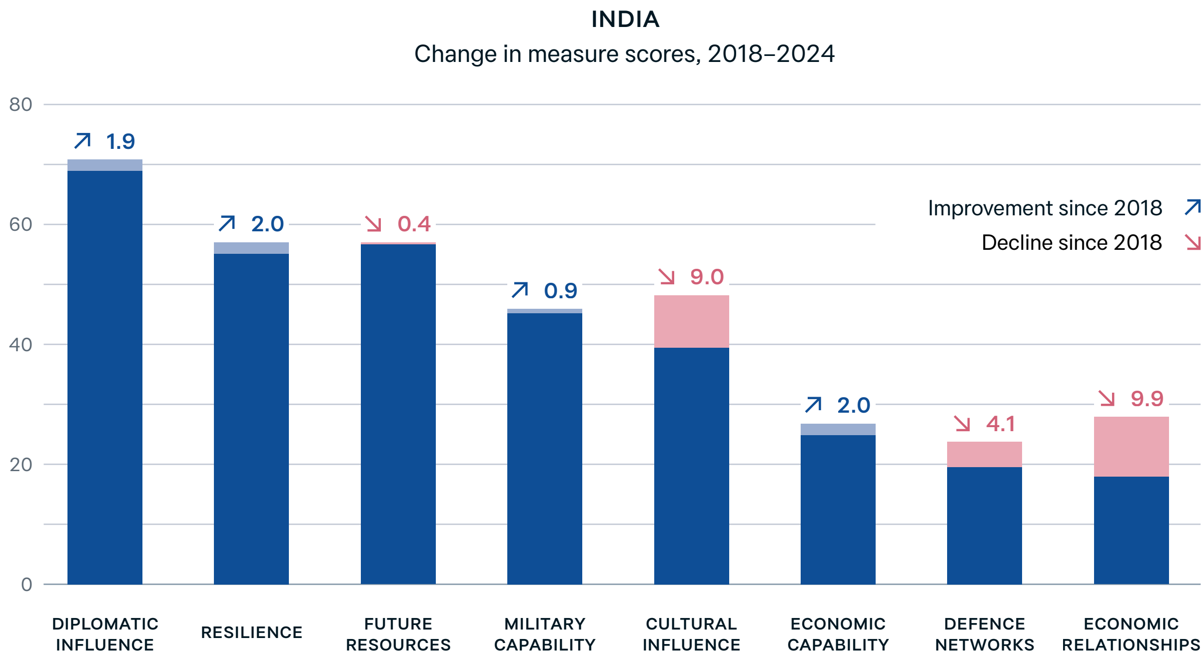
In the 2024 Asia Power Index, strong post-Covid economic growth saw India increase its Economic Capability by 4.2 points. It also grew well in all other resource measures, especially Future Resources, where its score increased by 8.2 points. This growth reflects the fact that India's youthful population may well deliver a demographic dividend over the decades ahead, unlike many other countries in Asia, including rival China, that are rapidly ageing and whose workforces are contracting.

India's Diplomatic Influence also rose in the 2024 Asia Power Index. Experts surveyed appraised Prime Minister Narendra Modi's global leadership and strategic ambition more highly. India increased its tempo of diplomatic activity in 2023, participating in the sixth-highest number of dialogues with Asia Power Index countries. Both these results suggest that India's strategy of non-alignment has modestly benefited its global standing. Even so, a large gap remains between the narrative of "India rising" and the reality of its limited power projection in Asia.

When it comes to India's economic influence in Asia, however, the picture is more mixed. Economic Relationships remain India's weak point, and India again lost a ranking in its score, being overtaken by Indonesia. India's low-level economic integration with the larger economies in Asia and weak participation in regional economic architecture means this trend is set to continue.

India's score for Defence Networks also declined, and for the third year in a row India lost a ranking, declining to 9th place, again being overtaken by Indonesia. India's non-aligned stance and caution about deepening security cooperation with the US alliance network means it will likely continue to lose relative ground in this measure, even as it launches flagship initiatives such as the sale of BrahMos missiles to the Philippines. In 2024, India's position outside the network of US security alliance cooperation was typified by the emergence of the "Squad" — a group comprising the United States, Japan, the Philippines, and Australia with a more overt security role than the longstanding "Quad" including India.

India's negative "power gap" — the difference between its projected influence in Asia based on its resources — is the biggest in the region barring Russia and North Korea. In part, this reflects the more global focus of New Delhi's foreign and security policy. However, it also suggests that India has plenty of latent potential to increase its influence in Asia, especially outside its own Indian Ocean neighbourhood.



4. Japan is hardening up

Japan is changing from an economic and cultural powerhouse to one much more active in defence and security cooperation.

The 2024 Asia Power Index confirms that outgoing Prime Minister Fumio Kishida was right to declare in his April speech to the US Congress that "Japan has changed over the years". In 2024, Japan's power increased by 1.6 points, among the biggest improvers in this edition of the Asia Power Index.

Yet for the first time since the inception of the Asia Power Index in 2018, Japan's power was narrowly outstripped by India's, pushing it from 3rd to 4th place for its comprehensive power in Asia. This is the result of an overall decline in Japan's power since 2018, notwithstanding its gain in 2024. Long-term structural factors, especially an ageing population, will continue to put downward pressure on the resources that Tokyo has available to project power in the region.

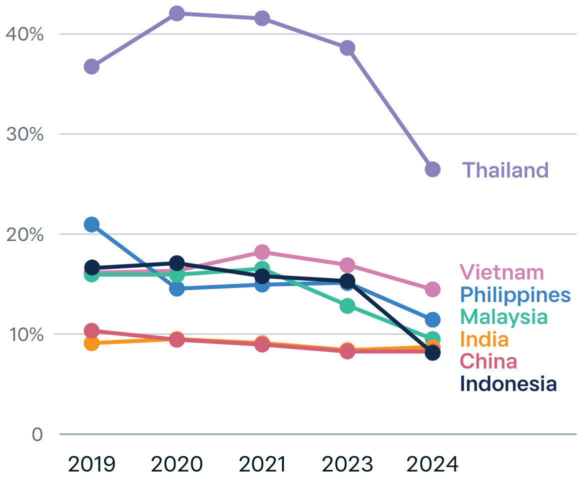
Reflecting this dynamic, Japan has suffered the greatest decline of any country on the Index in terms of Economic Capability, losing 1.4 points in this measure, caused by losses in the international leverage and technology sub-measures. Japan's technological advantage has eroded sharply in the face of competition from other advanced manufacturing hubs in South Korea, China, and Taiwan. This has redirected foreign investment away from the Japanese technology sector and, when coupled with demographic headwinds, has contributed to Japan's declining productivity.

Japan's score for Economic Relationships — one of its traditional advantages — has declined precipitously over the past six years, from 56 points in 2018 to just 36 points in 2024, with a continued sharp fall between the 2023 and 2024 editions of the Asia Power Index. While Japan's trade with Asia Power Index countries has also become relatively less important over time, the largest part of this fall is caused by a declining score in regional investment ties: in 2024, Japan lost more than ten points in this sub-measure.

In absolute terms, Japan's overall investment remains strong: ten-year cumulative foreign investment by Japan in the region fell by less than one per cent when compared to the 2023 edition of the Asia Power Index. But Japan has declined in relative terms, with its share of total investment flows falling in several of the region's larger economies, particularly Thailand, the Philippines, and Indonesia.

JAPANESE FOREIGN INVESTMENT

Three-year capital investment in selected markets, share of total



Data sourced from FDI Markets, April 2024

The policies set out by former prime minister Shinzo Abe and implemented by his successors, including Tokyo's 2022 commitment to increase defence spending to two per cent of GDP, have yet to make their mark on Japan's Military Capability score. Japan's Military Capability grew by a modest 1.6 points in 2024, but still remains below its 2018 score, reflecting faster-paced growth in capabilities by other powers, especially China.

Japan's Defence Networks in Asia, however, have evolved far more rapidly, confirming that Tokyo has started to step up as a regional security actor in its own right. In 2018, Japan was outranked by South Korea on this measure, with a score of just 44 points. In 2024, Japan scored 58 points, surpassing South Korea by 19 points.

Japan's growing score for Defence Networks has been led in large part by the rapid deepening of the US–Japan security alliance. In mid-2024, the United States and Japan announced they would upgrade US Forces Japan into a joint force headquarters with operational and warfighting responsibilities.

The 2024 Asia Power Index shows a massive ramp-up in combined military exercises and defence dialogues between the two allies, now far outstripping any other defence pairing in the region, including the US–Australia alliance. Japan's arms imports from the United States also grew rapidly, from US$4.61 billion (SIPRI Trend Indicator Value) over the previous ten-year period to US$7.68 billion. If continued, this trend could also prompt a further future growth in Japan's Military Capability score.

Japan's regional personality change looks set to continue. Outside the US alliance fold, Japan is also becoming a more important regional defence actor. Tokyo's 2022 National Security Strategy endorsed a policy to support the defence capabilities of less developed Indo-Pacific countries. Japan notably signed a Reciprocal Access Agreement with the Philippines, highlighting its growing role as a regional security provider. The Index shows that Japan held the most combined trainings with non-allied countries in 2022–23 (an indicator for which Japan ranked just 6th in 2018) and the second-largest number of defence dialogues in the region, nearly equalling the United States for this indicator.

5. Southeast Asian powers on the rise

Southeast Asia's heavyweights are getting heavier: Indonesia's power has grown more than any other Index country since 2018.

Ninth-ranked Indonesia — the largest country of Southeast Asia, with a population of 280 million — has grown more powerful. In 2024, it gained 2.9 points, more than any other Asia Power Index country. It is also the country with the highest growth in comprehensive power since 2018.

Indonesia's growing power in Asia is multifaceted. At the structural level, Indonesia's Economic Capability grew strongly, driven by growing technological sophistication and increased connectivity with the world. Indonesia surpassed India and Vietnam in the Economic Relationships measure in this year's Asia Power Index, reflecting its growing strength across all relevant sub-measures: trade, investment, and economic diplomacy.

INDONESIA AND TIMOR-LESTE

The 2024 Asia Power Index, which includes Timor-Leste for the first time, casts light on the importance of Indonesia to Timor-Leste in terms of trade and people exchanges.

- Indonesia is Timor-Leste's most important source of imports, accounting for 28 per cent of all imports, and second-most important destination for exports after China, accounting for 22 per cent of all exports from Timor-Leste.

- Indonesia is the most popular foreign study destination for Timor-Leste students. More than 1,000 students from Timor-Leste are studying at Indonesian universities, accounting for 12 per cent of international students in the country.

- Nearly 60 per cent of the Timor-Leste global diaspora is in Indonesia (almost 24,000 people).

- Indonesia is the top bilateral diplomacy partner for Timor-Leste, accounting for 16 per cent of all meetings it held with Asia Power Index countries at leader or foreign minister level in 2023. Timor-Leste was Indonesia's second-most important partner for bilateral diplomacy after Malaysia.

In Diplomatic Influence, Indonesia's score increased by 5.1 points, overtaking Australia to rank 6th in this measure. Indonesia's term as chair of the Association of Southeast Asian Nations (ASEAN) in 2023 saw it increase its influence in multilateral forums. Experts surveyed for the 2024 Asia Power Index were modestly more positive about Indonesian foreign policy, with the largest increase in points being awarded for its political leadership at the regional level — likely a reflection of Jakarta's sure-footed chairing of the ASEAN grouping.

Indonesia hosted fewer bilateral visits given its ASEAN chairing responsibilities but remained among the most active countries in the region in terms of bilateral diplomacy, behind only Japan and Vietnam. This reflects Indonesia's growing relevance in the eyes of other major players in the region.

Indonesia also scored more highly for Defence Networks, reversing a trend of decline in the previous three editions of the Asia Power Index. Indonesia ranked 4th for its participation in defence dialogues and combined exercises, the highest of any country outside the US alliance network.

Indonesia's growing scores across the Index's influence measures, especially for Economic Relationships and Diplomatic Influence, challenge traditional perceptions of the country as mostly insular and domestically focused. Indonesia may be starting to look outward, even before Prabowo Subianto — widely seen as more internationally minded than current President Joko Widodo — takes power.

A further factor underpinning Indonesia's improved influence score in the 2024 Asia Power Index is the inclusion of Timor-Leste in our annual assessment for the first time. The two neighbours have overcome difficult historical legacies to form a close relationship, with important economic and people exchanges, as reflected by Jakarta's support for Timor-Leste's prospective inclusion as the newest ASEAN member state (see text box).

Southeast Asia's second-most populous country, the Philippines, has also experienced a lift in its Asia Power Index ranking in 2024. Its score rose by two points, and it overtook Pakistan to rank 15th, its highest position in any edition of the Asia Power Index. The Philippines gained a small amount of ground across several measures, including Military Capability (an increase of 2.2 points).

But it was in terms of Diplomatic Influence (an increase of 12.1 points) that the Philippines saw the greatest improvement in this year's Index. Experts surveyed for the 2024 Asia Power Index were far more positive about the leadership of President Ferdinand R. Marcos Jr than they were at the start of his term.

This was likely a reflection of Marcos' strategy of seeking closer ties with ally the United States and a broader range of US-aligned partners outside ASEAN, such as Japan, Australia, and India, from whom it purchased BrahMos anti-ship missiles in 2024.

In 2023, the Asia Power Index had shown a strong improvement in Manila's alliance ties with the United States, a development that was sustained and deepened in 2024. In this edition of the Asia Power Index, the Philippines also registered an improvement of 3.4 points for its ties with other non-allied regional countries, a reflection of its active outreach across a diverse range of partners.

6. Australia is holding its own

Australia continues to rise up the Asia Power Index rankings as others falter, but its own power is just holding steady.

In 2024, Australia surpassed Russia to rank 5th in the Asia Power Index, with a gain of one point in its comprehensive power. This increase in ranking, Australia's second since the inception of the Asia Power Index (it surpassed South Korea in 2020), is more a function of Russia's decline since 2018 than Australia's rise. Russia has lost 3.7 points for comprehensive power since 2018, while Australia's score is only 0.4 points higher over the same period. Still, the fact that Australia's power is holding steady contradicts a more pessimistic view that over time, it will become a smaller and less relevant player as other much larger economies rise.

Even so, Australia lost standing in the Resilience and Future Resources measures of the 2024 Asia Power Index. This was particularly notable in the Resilience measure, where Australia suffered a decline in resource security, driven by a worsening energy trade balance. Australia's rare-earth exports were also slightly lower in both relative and absolute terms, suggesting that its goal of becoming a globally diversified supplier of materials used for clean energy technology remains an aspiration, rather than a reality.

Yet when it comes to the Asia Power Index influence measures, Australia has proved resilient, trending upwards for Diplomatic Influence, Cultural Influence, and Economic Relationships. Australia's score for Defence Networks — always a strong suit for Canberra — dropped slightly but its second-place rank remained unchallenged.

In line with this dynamic, Australia's positive "power gap" — the degree to which it has influence outstripping its resources — increased in the 2024 Asia Power Index. This finding suggests that Australia need not fear irrelevance in Asia in the years to come if it can continue to make sound decisions and leverage its capabilities creatively to achieve its goals.

MEASURE PERFORMANCE

Scores of selected middle powers, 2024

	Australia	India	Japan	Russia	South Korea
ECONOMIC CAPABILITY	12.9	26.1	27.2	12.7	18.8
MILITARY CAPABILITY	27.0	45.2	29.0	54.8	33.4
RESILIENCE	41.6	56.5	35.6	68.9	34.8
FUTURE RESOURCES	10.2	55.9	11.6	20.4	11.1
COMPREHENSIVE POWER	31.9	39.1	38.9	31.1	31.0
ECONOMIC RELATIONSHIPS	22.8	17.5	35.9	5.9	27.0
DEFENCE NETWORKS	62.8	19.0	58.3	18.4	39.3
DIPLOMATIC INFLUENCE	64.8	70.2	88.8	56.0	66.1
CULTURAL INFLUENCE	33.5	38.7	42.5	20.5	27.2

Although its score for Diplomatic Influence increased by a healthy three points, Australia's ranking declined by two places, overtaken by Indonesia and South Korea. There is evidence that a "honeymoon" effect from a change in government reflected in the 2023 Asia Power Index has worn off in 2024. Experts surveyed were less enthusiastic about Prime Minister Anthony Albanese's leadership at the regional level and Australia was somewhat less active in meeting diplomatic counterparts, in comparison to an initial round of regional engagement after the government was sworn in in 2022.

A sharp contrast is neighbour New Zealand, which has lost 14 per cent of its comprehensive power since 2018 and is one of only three countries alongside Russia and war-torn Myanmar to decline in overall power in this year's Index. While New Zealand had small losses in several measures, its main reduction in power is traceable to a drop in Diplomatic Influence and less extensive Defence Networks. New Zealand's Diplomatic Influence has declined steadily since 2019, sliding down the ranks from 11th in 2021 to 15th in 2024. A similar trend is evident for its performance in the Defence Networks measure where it has lost 11 points compared to 2018, as Wellington has largely been left behind by the quickening pace of Asia's defence diplomacy.

7. Russia's dwindling relevance

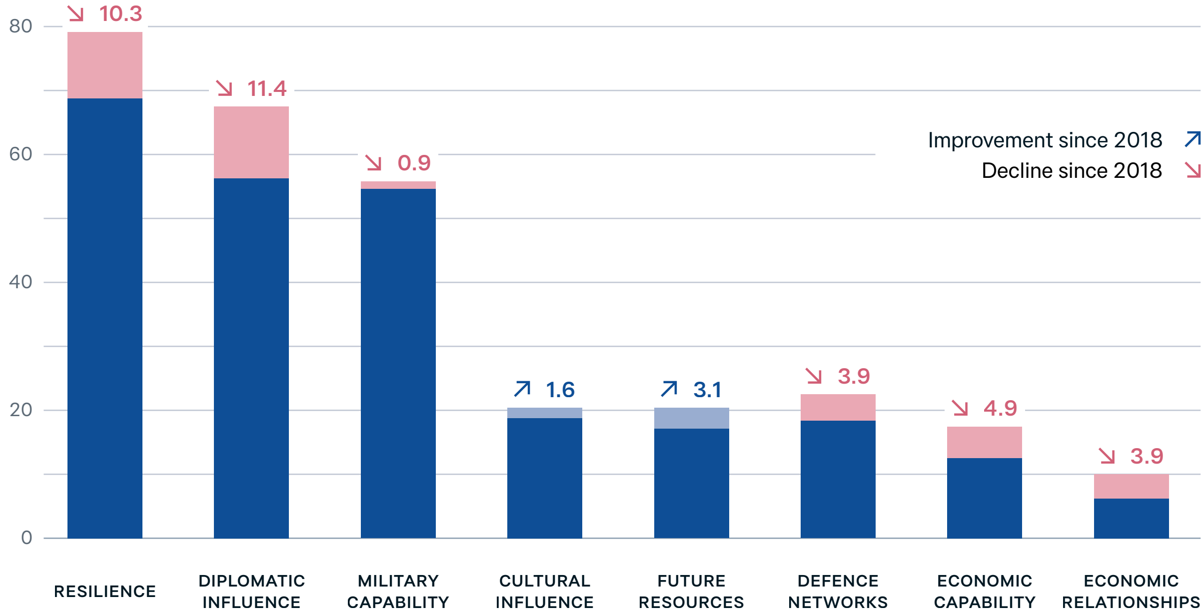
Russia has slipped down the power rankings to sixth place. Its relevance to Asia is declining as its war on Ukraine saps resources and focus.

Russia's invasion of Ukraine is having deeply unfavourable repercussions for its power in Asia. Prior to 2022 Russia, geographically a Eurasian country, still had robust relationships with many countries in Asia, largely due to defence procurement and broader strategic ties dating back to the Cold War.

But it has lost more standing in Asia than any other country through six iterations of the Index, all of which has taken place since 2020. In 2024, Russia lost a further 0.4 points, and it narrowly lost its fifth-placed ranking in the Asia Power Index to Australia.

Spurred on by its war economy and new investments in its defence industry, Russia's GDP grew strongly over the past year. Yet the 2024 Asia Power Index attests to deep weaknesses beneath the surface for both Russia's Economic Capability and Resilience. Russia dropped 1.1 points for its Economic Capability,

RUSSIA
Change in measure scores, 2018–2024



despite a rebound in its domestic economy, signifying a loss of international economic leverage and global connectivity. Russia lost 7.5 points for Resilience, driven by declining scores for government effectiveness and internal stability, and a loss of export markets affecting its geoeconomic security.

Russia also suffered a three-point loss for Diplomatic Influence, with its ranking for this measure falling to 10th in Asia. Russia's more isolated position following its invasion of Ukraine saw it lose multilateral power. Russia scored less well in the diplomatic dialogues indicator, holding fewer meetings with counterparts in Asia in 2023, although tellingly, it was the top diplomatic partner in terms of number of meetings for China, North Korea, and Pakistan. Experts surveyed for the 2024 Asia Power Index appraised Vladimir Putin as less able to advance his country's interests globally than in the previous year, and downgraded the score for the efficacy of Russia's diplomatic service and foreign policy bureaucracy.

However, Russia's Military Capability, a durable source of comparative advantage for Moscow, increased by 2.3 points in 2024. This small increase reflects Moscow's war economy footing and ability to sustain and replenish ammunition, equipment inventories, and personnel at a rapid pace in order to continue to wage war on Ukraine.

Russia's Defence Networks declined slightly and now rank 11th for this measure, behind India and the Philippines'. This decline occurred despite Moscow's newly agreed alliance with Pyongyang. Its level of participation in defence dialogues was similar to previous editions of the Asia Power Index but given the rapid growth in minilateral and bilateral defence diplomacy among the US alliance network, this saw Russia go backwards in relative terms. It was the top partner only for Myanmar and North Korea, both diplomatic outcasts in the region. It ranked just 17th for participation in combined training exercises with Asia Power Index countries, signifying that despite legacy partnerships, it does not occupy a central position in regional defence networks.

Against this backdrop, Putin's 2024 visits to China, North Korea, and Vietnam look more like an effort to shore up Russian influence than an indicator of continued relevance. For the most part, Russian resources remain committed to the European theatre, not to Asia.

8. Tripolar diplomacy

While Asia remains a "bipolar" game dominated by two superpowers, when it comes to Diplomatic Influence, power is more widely distributed, and Japan is a leading player.

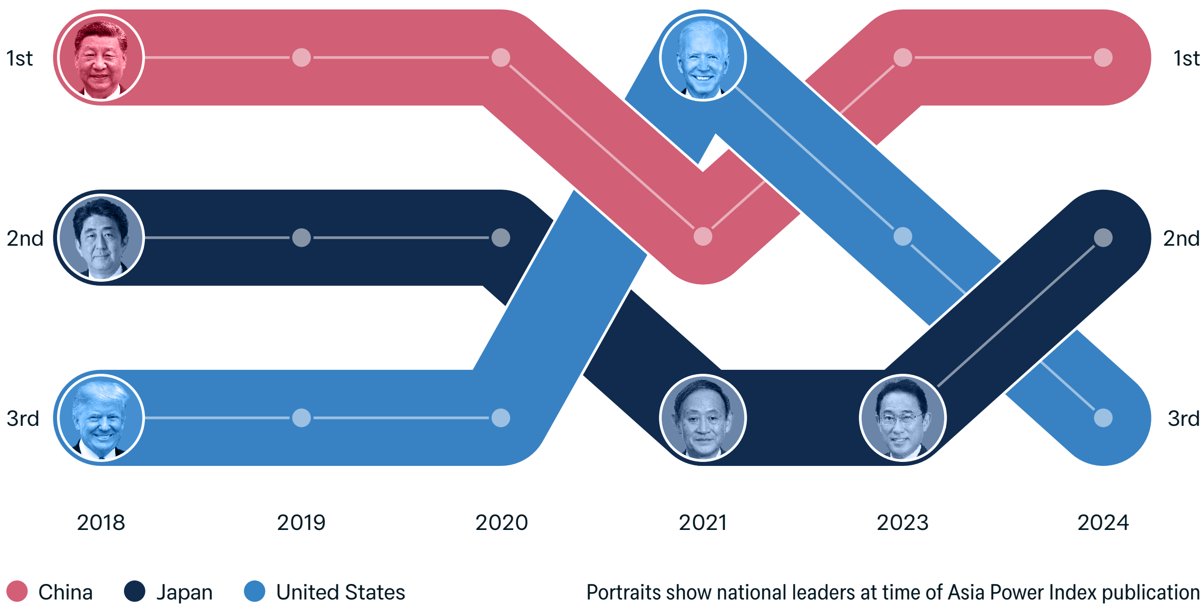
In the 2024 Asia Power Index, Japan overtook the United States to become second-ranked for Diplomatic Influence, seeing the United States dropping to 3rd in that measure of power for the first time since the Trump administration in 2020.

China — the country with the highest Diplomatic Influence in Asia, a position that it has held in every edition of the Asia Power Index — takes a systematic approach to diplomacy in the region. In 2023, it held a bilateral diplomatic dialogue at leader or foreign minister level with every other Asia Power Index participant, except North Korea and Taiwan, suggesting a wide but also relatively shallow approach. This is further supported by the judgements of experts surveyed for the Asia Power Index who since 2018 have consistently assessed China as having the greatest strategic ambition in the region. Perhaps reflecting Beijing's move away from brash "wolf warrior" diplomacy, the expert survey found a large improvement in the perceptions of China's diplomatic service — rising from 11th in the region to 6th, its highest ever ranking.

By contrast to China, US foreign policy largely focuses more narrowly on its relationships with its traditional partners. This is evident in the patterns of its diplomatic engagements, with nearly 40 per cent of its bilateral diplomatic meetings being held with Quad partners, Australia, India, and Japan. The United States had no meetings at presidential or secretary of state level with 11 of the 26 other Index countries — ranking 9th in this indicator. This is likely the result of the United States' need to juggle its global priorities and continuing focus on both the war in Ukraine and conflict in the Middle East. Experts surveyed saw US President Joe Biden as having the strongest global leadership, but ranked him just 10th for leadership in Asia — the lowest level since he became president. The shortcomings in its regional leadership and diplomatic engagements saw Washington return to the rank it held when Donald Trump was president, although its underlying score remains more than ten points higher.

DIPLOMATIC INFLUENCE MEASURE

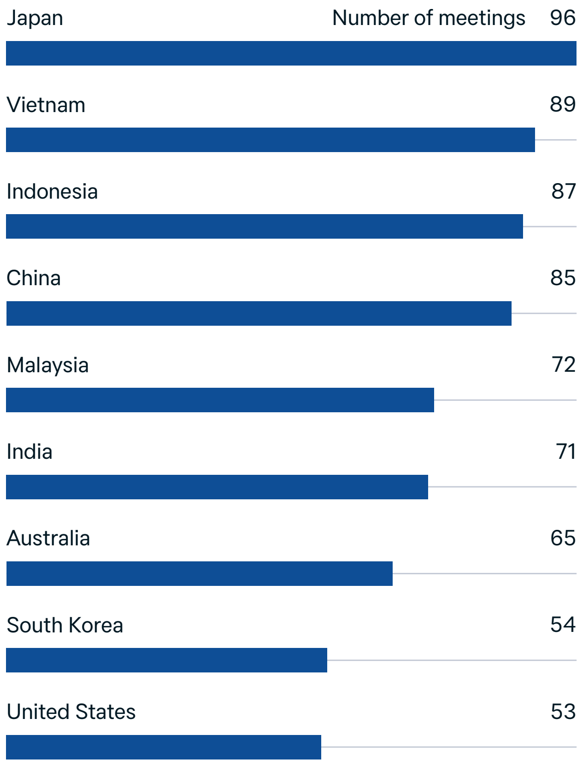
Top three rank changes, 2018–2024



Portraits show national leaders at time of Asia Power Index publication

DIPLOMATIC DIALOGUES

The most active Asia Power Index countries in bilateral diplomacy between leaders or foreign ministers, 2023



Weaknesses in the two traditional powers in the region have left room for Japan to act as its own diplomatic pole. Its Diplomatic Influence rose to its highest level since Shinzo Abe was prime minister in 2020. Under outgoing Prime Minister Fumio Kishida, Japan was the most active diplomatic player for 2023, with 96 bilateral meetings — 47 held at leader level. These included Japan's traditional partners — 11 meetings with the United States and multiple meetings with every Southeast Asian country, except Myanmar — but also notably featured much greater engagement with South Korea (13 bilateral and seven trilateral meetings). However, experts assessed Prime Minister Kishida much less positively than his predecessors for both his regional leadership, which dropped by nine points to its lowest ever level, and his global leadership, which dropped two places to 4th. This suggests that there is a limited quality to Japan's diplomatic engagement with the region.

The two nations that have had the largest increase in Diplomatic Influence for the 2024 edition of the Asia Power Index are the Philippines (an increase of 12.1 points) and Malaysia (up 9.1 points), both led by new and diplomatically active leaders. Philippines President Ferdinand R. Marcos Jr and his foreign minister held 34 more bilateral diplomatic dialogues in 2023 than his predecessor Rodrigo Duterte did in 2021. Marcos' time in charge has been defined by a more assertive approach to the country's territorial disputes with China. Experts appraised this strategy highly, scoring his regional and global leadership 30 and 50 points higher than his first year in office. This has been reflected in his invitations to give high-profile speeches at the White House and Australian parliament, along with delivering the 2024 Shangri-La Dialogue keynote address in Singapore.

Malaysian Prime Minister Anwar Ibrahim has also been far more active internationally than his predecessor Ismail Sabri Yaakob. Together with his foreign ministers, Anwar held 72 bilateral meetings with Index countries, elevating Malaysia from 11th to 5th place in this indicator of diplomatic activity. Malaysia's rank for regional leadership rose by two places to 12th, and global leadership by one rank to 15th. Yet experts surveyed were mixed in their assessment of Anwar's efficacy, perhaps reflecting doubts about his contentious support for Hamas in the Middle East and close ties to China.

Measures of Power

ECONOMIC CAPABILITY

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

UPWARD · DOWNWARD · NO CHANGE

	RANK	COUNTRY/TERRITORY	SCORE	TREND
	1	United States	90.2	↗
	2	China	86.7	—
	3	Japan	27.2	↘
	4	India	26.1	↗
	5	South Korea	18.8	↗
	6	Singapore	14.9	↗
+1	7	Taiwan	13.2	—
+1	8	Australia	12.9	↗
−2	9	Russia	12.7	↘
	10	Indonesia	9.7	↗

Annual change in ranking

Trends track annual changes in measure scores above a minimum threshold (≥ 0.5)

Size: The economic weight of a country as reflected by its GDP, which is the total value of all final goods and services produced annually within an economy. Purchasing power parity exchange rates are used to allow for a reliable comparison of real levels of production between countries.

International leverage: Resources that give governments enhanced financial, legal, and sanctioning powers abroad. These include global corporations and internationalised currencies, as well as sovereign wealth funds, export credit agencies, and official reserves.

Technology: The technological and scientific sophistication of countries. This is measured through indicators such as labour productivity, high-tech exports, supercomputers, renewable energy generation, and input variables including R&D spending.

Connectivity: The capital flows and physical means by which countries connect to and shape the global economy, including through international trade, global inward and outward investment flows, merchant fleets, and international aviation hubs.

MILITARY CAPABILITY

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

Change	RANK	COUNTRY/TERRITORY	SCORE	TREND
	1	United States	90.0	↘
	2	China	69.7	↗
	3	Russia	54.8	↗
	4	India	45.2	↗
	5	South Korea	33.4	–
	6	Japan	29.0	↗
+1	7	North Korea	27.3	↗
−1	8	Australia	27.0	↗
	9	Singapore	24.5	–
	10	Pakistan	22.5	↘

UPWARD DOWNWARD NO CHANGE

Annual change in ranking

Trends track annual changes in measure scores above a minimum threshold (≥ 0.5)

Defence spending: Annual spending on military forces and activities. This sub-measure looks at current resources devoted to maintaining, renewing, replacing, and expanding military capability, measured in terms of military expenditure at market exchange rates and estimated defence-sector PPP rates.

Armed forces: Total active military and paramilitary forces, readiness, and organisation. This sub-measure is principally focused on the size of armed forces, but also takes account of their combat experience, training, and preparedness, as well as command and control structures.

Weapons and platforms: A country's stock of land, maritime, and air warfare assets and capabilities. This sub-measure consists of a number of proxy indicators for capability

Signature capabilities: Military capabilities that confer significant or asymmetric tactical and strategic advantages in warfare. These include ballistic missile capabilities, long-range maritime force projection, intelligence networks, and defensive and offensive cyber capabilities.

Asian military posture: The ability of armed forces to deploy rapidly and for a sustained period in the event of an interstate conflict in Asia. This sub-measure consists of qualitative expert-based judgements of a country's ability to engage in either a maritime or continental military confrontation in the region.

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.

UPWARD DOWNWARD NO CHANGE

	RANK	COUNTRY/TERRITORY	SCORE	TREND
	1	United States	85.0	↗
+1	2	China	70.6	—
−1	3	Russia	68.9	↘
	4	India	56.5	↗
	5	Australia	41.6	↘
	6	New Zealand	39.4	↘
+4	7	Japan	35.6	↗
+2	8	South Korea	34.8	↗
	9	North Korea	34.6	↗
−2	10	Malaysia	32.4	↘

Annual change in ranking

Trends track annual changes in measure scores above a minimum threshold (≥ 0.5)

Internal stability: Institutional and environmental factors that enhance domestic governance and provide protection from external interference in internal affairs. This sub-measure includes indicators assessing government effectiveness, political stability, major ecological threats, and the absence of internal conflict.

Resource security: Secure access to energy and other critical resources essential to the functioning of a country's economy. This sub-measure looks at dependency on energy imports, energy self-sufficiency levels, refined fuel security, and the supply of rare-earth metals.

Geoeconomic security: The ability to defend against other states' economic actions on a country's geopolitical interests and economic activity. This sub-measure looks at an economy's diversity of export markets and products, as well as its levels of dependency on primary trade partners and global trade.

Geopolitical security: Structural and political factors that minimise the risk of interstate conflict and enhance a country's territorial security. This sub-measure includes indicators such as population size relative to neighbours and geographic deterrence based on landmass, as well as active border disputes and legacies of interstate conflicts with neighbours.

Nuclear deterrence: Strategic, theatre, and tactical nuclear forces that can be used to deter potential aggressors by threatening a retaliatory nuclear strike. This sub-measure assesses nuclear weapons range, ground-based nuclear missile launchers, and nuclear second-strike capabilities.

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 2035, as well as working-age population forecasts for 2050.

UPWARD DOWNWARD NO CHANGE

Annual change	RANK	COUNTRY/TERRITORY	SCORE	TREND
	1	United States	79.5	↗
	2	China	71.1	↘
	3	India	55.9	↗
	4	Russia	20.4	↗
+3	5	Pakistan	14.2	↗
	6	Indonesia	12.7	↗
−2	7	Japan	11.6	–
−1	8	South Korea	11.1	–
	9	Australia	10.2	–
	10	Vietnam	8.6	↗

Annual change in ranking

Trends track annual changes in measure scores above a minimum threshold (≥ 0.5)

Economic resources 2035: Future economic size and capabilities. This is measured by forecast GDP at purchasing power parity in 2035 and the Beckley formula for estimating economic power; multiplying forecast GDP by forecast GDP per capita.

Defence resources 2035: Future defence spending and military capability enhancements. This sub-measure consists of two indicators. The first looks at forecasts of absolute levels of military expenditure in 2035, holding the current ratio of defence spending to GDP constant. The second looks at expected gains in military expenditure as a proxy for investments in military capability above replacement levels.

Broad resources 2035: Estimated score for a country's broad resources and capabilities in 2035. This sub-measure estimates broad resources in 2035, based on every country's current ratio of GDP and military expenditure to their aggregate score for economic capability, military capability, and resilience.

Demographic resources 2050: Demographic variables that are expected to contribute to future GDP beyond 2035. This sub-measure consists of a forecast of the working-age population (15–64) in 2050 as well as the expected labour dividend from gains in the working-age population adjusted for quality of the workforce.

ECONOMIC RELATIONSHIPS

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

UPWARD DOWNWARD NO CHANGE

	RANK	COUNTRY/TERRITORY	SCORE	TREND
	1	China	98.1	–
	2	United States	57.1	↗
	3	Japan	35.9	↘
	4	Singapore	30.3	↗
	5	South Korea	27.0	↗
	6	Australia	22.8	↗
	7	Thailand	20.2	↗
	8	Malaysia	19.0	↗
+2	9	Indonesia	17.7	↗
−1	10	India	17.5	↗

Annual change in ranking

Trends track annual changes in measure scores above a minimum threshold (≥ 0.5)

Regional trade relations: The ability to influence other countries through bilateral trade flows and relative dependencies. This sub-measure focuses on an economy's relative importance as an importer, exporter, and primary trade partner for other countries, based on annual bilateral trade flows.

Regional investment ties: The ability to influence other countries through foreign direct investment flows and relative dependencies. This sub-measure focuses on an economy's relative importance as a source and destination of foreign investment for other countries, based on ten-year cumulative flows of foreign capital investment.

Economic diplomacy: The use of economic instruments to pursue collaborative interests and beneficial geopolitical outcomes. This sub-measure tracks economic diplomacy through free trade agreements and outward foreign assistance flows.

DEFENCE NETWORKS

Defence partnerships that act as force multipliers of autonomous military capability; measured through assessments of alliances, regional defence diplomacy, and arms transfers.

UPWARD / DOWNWARD / NO CHANGE

	RANK	COUNTRY/TERRITORY	SCORE	TREND
	1	United States	85.1	–
	2	Australia	62.8	–
	3	Japan	58.3	↗
	4	South Korea	39.3	↘
	5	Singapore	29.3	↘
	6	New Zealand	27.7	↘
	7	China	23.6	–
+5	8	Indonesia	19.1	↗
−1	9	India	19.0	↘
−1	10	Philippines	18.9	↘

Annual change in ranking

Trends track annual changes in measure scores above a minimum threshold (≥ 0.5)

Regional alliance network: Number, depth, and combined strength of defence alliances in the region. This is measured in terms of codified security guarantees, military personnel deployed in Index countries, joint military training exercises, arms procurements from allied partners, and combined operation years with allies.

Regional defence diplomacy: Diversity and depth of defence diplomacy in the region. This sub-measure assesses defence dialogues, defence consultation pacts, foreign deployments between non-allied defence partners, joint military training exercises, combined operation years, and arms procurements from non-allied countries.

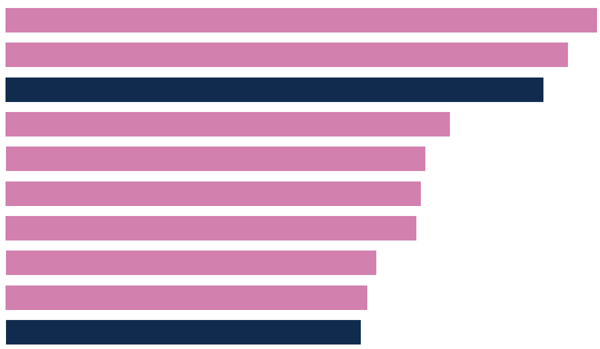
Global defence partnerships: Arms trade patterns indicative of global security partnerships and collaboration across defence industries, measured in terms of annual arms trade flows and number of arms export recipients over a five-year period.

DIPLOMATIC INFLUENCE

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

UPWARD | DOWNWARD | NO CHANGE

Annual change	RANK	COUNTRY/TERRITORY	SCORE	TREND
	1	China	93.4	↗
+1	2	Japan	88.8	↗
−1	3	United States	85.1	↘
	4	India	70.2	↗
+1	5	South Korea	66.1	↗
+1	6	Indonesia	65.6	↗
−2	7	Australia	64.8	↗
+1	8	Vietnam	58.6	↗
+1	9	Singapore	57.1	↗
−2	10	Russia	56.0	↘



Annual change in ranking

Trends track annual changes in measure scores above a minimum threshold (≥ 0.5)

Diplomatic network: The regional and global reach of a country's diplomatic offices, measured in terms of total number of embassies, high commissions, permanent missions, and other representative offices.

Multilateral power: A country's participation and diplomatic clout in multilateral fora. This sub-measure examines membership in select summits, diplomatic clubs, and intergovernmental organisations, as well as financial contributions to the United Nations and development banks, and voting alignment with other countries in UN resolutions.

Foreign policy: The ability of government leaders and foreign policy bureaucracies to advance their country's diplomatic interests. This sub-measure aggregates quantitative data on diplomatic engagements at leader or foreign minister level with qualitative expert-based judgements of how effectively leaders pursue their country's diplomatic interests, their demonstrated level of strategic ambition, and the wider efficacy of a country's foreign policy bureaucracy.

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.

UPWARD DOWNWARD NO CHANGE

	RANK	COUNTRY/TERRITORY	SCORE	TREND
	1	United States	80.9	–
	2	China	47.0	–
	3	Japan	42.5	↗
	4	India	38.7	–
	5	Australia	35.4	↗
	6	Malaysia	28.9	↗
+1	7	Thailand	27.7	↗
−1	8	South Korea	27.2	↗
	9	Singapore	26.7	↗
+1	10	Indonesia	22.5	↗

Annual change in ranking

Trends track annual changes in measure scores above a minimum threshold (≥ 0.5)

Cultural projection: Cultural influences and exports that help to enhance a country's reputation abroad. This sub-measure looks at online search trends in the region, exports of cultural services, global brands, and the international status of a country's passports, cities, and heritage sites.

Information flows: The regional appeal of a country's media outlets and universities. This sub-measure looks at the online search trends in the region for selected national news agencies, newspapers, television and radio broadcasters, as well as the number of inbound international students from the region enrolled in tertiary education.

People exchanges: The depth and influence of a country's people-to-people links in the region. This sub-measure tracks the size of regional diasporas, and the attractiveness of countries as travel and emigration destinations.

2024 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 what 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.

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.

Japan's Power Gap score of 11.0 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. By contrast, North Korea — a misfit middle power — derives its power principally from its military resources and nuclear weapons capability. The country's diplomatic and economic isolation, however, limits its regional influence resulting in a Power Gap score of –7.4.

Australia, Singapore, and South Korea have more influence than their raw capabilities would indicate. They are highly networked and externally focused. Positive Power Gaps scores among top performing middle powers point to their ability and willingness to work collaboratively with other countries to pursue collective interests.

Developing countries often register influence shortfalls — reflecting their unrealised power potential and internal constraints on their ability to project power abroad. Meanwhile, Taiwan's negative Power Gap reflects its inconsistent performance across the influence measures due to a lack of formal diplomatic recognition and the territory's exclusion from key multilateral forums and initiatives. Russia's Power Gap score of –6.6 indicates its regional influence is limited by its position on the geographic periphery of Asia.

TREND	COUNTRY/TERRITORY	
	OVERACHIEVERS Influence exceeds resources	
↗	Japan	11.0
↗	Australia	7.9
↗	Singapore	5.1
↗	South Korea	4.5
↗	Thailand	4.3
↗	Malaysia	4.2
↗	Indonesia	3.7
↗	Philippines	2.5
—	Vietnam	2.2
↗	Cambodia	0.8
↘	New Zealand	0.2
—	China	0.1
	UNDERACHIEVERS Resources exceed influence	
—	Laos	−0.6
↘	Brunei	−1.4
↘	United States	−1.5
↘	Myanmar	−1.8
↗	Sri Lanka	−2.2
↘	Bangladesh	−2.3
—	Mongolia	−2.5
—	Timor-Leste	−2.5
↘	Nepal	−2.6
↗	Papua New Guinea	−3.0
↘	Taiwan	−3.8
↘	Pakistan	−3.9
↘	India	−3.9
↘	Russia	−7.0
↘	North Korea	−7.4

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.

Methodology

The Lowy Institute Asia Power Index consists of eight measures of power, 30 thematic sub-measures and 131 indicators. Over half of these indicators involve original Lowy Institute research, while the rest are drawn from hundreds of publicly available national and international sources.

Quantifying international power presents several key challenges. First, the relative importance of factors determining relative power is subject to debate. Second, it is difficult to obtain reliable and cross-comparable data across 27 countries.

The selection of indicators was driven by an extensive literature review and expert consultations designed to address these methodological hurdles. As such, each indicator represents a carefully selected proxy for a broader category of variables often more difficult, if not impossible, to measure comparatively.

The methodological framework of the Index is informed by the OECD's Handbook on Constructing Composite Indicators. A distance-to-frontier approach is used to compare a country's results with the best performing and worst performing countries in each data set.

The distance-to-frontier method allows for different indicators to be made comparable across a diverse set of metrics, while preserving the relative distance among the original data values. The method also reflects the notion that power in international relations is relative, measured as a comparative advantage in a given frame of reference.

Weightings

The Lowy Institute has assigned a set of weightings to the component parts of the Asia Power Index that reflect their relative importance for exercising state power.

These authoritative weightings reflect the collective judgement of Lowy Institute experts based on relevant academic literature and consultations with policymakers from the region. They take into account the dimensions of power considered most advantageous to countries given the current geopolitical landscape of the region.

Measure	Weighting
Economic Capability	17.5%
Military Capability	17.5%
Resilience	10%
Future Resources	10%
Economic Relationships	15%
Defence Networks	10%
Diplomatic Influence	10%
Cultural Influence	10%

While our weightings are consistent with broadly held views in the policy and scholarly communities, it is of course possible to reach other value judgements about the relative importance of the measures. An innovative calculator on the digital platform enables users to adjust the principal weightings according to their own assumptions and reorder the rankings on that basis.

Sensitivity analysis has determined that the large number of indicators included in the Index, and variations across countries within those indicators, are quantitatively more important than our weighting scheme. The data points play the primary role in determining the rankings of the Lowy Institute Asia Power Index.

Review: Three stages

The Index model underwent three stages of review after development. First, the analytical assumptions and findings were submitted through an extensive peer review process. Second, a team of fact checkers verified that the raw data points and their normalised scores were factually correct and drew on the latest available data. Third, PwC provided a limited integrity review of the spreadsheets and formulas used to calculate the eight measures of the Index.

Indicators and Sources

ECONOMIC CAPABILITY

Sub-measure	Indicators	Technical description
Size **40%**	GDP	Estimated GDP at purchasing power parity, current prices (2024); IMF
International leverage **20%**	Corporate giants	Number of public companies listed in the Forbes 2000 (2024); Forbes 2000
	Global reserve currency	Currency composition of official foreign exchange reserves, annualised average (2023); IMF
	International currency share	Share of international financial transactions undertaken in national currency, annualised average (2023); Society for Worldwide Interbank Financial Telecommunication (SWIFT)
	Official reserves	Official reserve assets including gold, current dollars (2022); World Bank; Reuters; Central Bank of Taiwan
	Export credit agencies	Export credit agencies, total assets, current dollars (2023); Lowy Institute
	Sovereign wealth funds	Sovereign wealth funds, total assets, current dollars (2024); Lowy Institute; Sovereign Wealth Fund Institute
Technology **20%**	High-tech exports	Estimated technological sophistication of exports EXPY, 0–100 (2022); World Bank World Integrated Trade Solutions (WITS) database; Lowy Institute
	Productivity	GDP output per worker, constant 2015 dollars (2024); International Labour Organization
	Human resources in R&D	Total R&D researchers, full-time equivalent (latest year available); UNESCO; Taiwan Statistical Data Book; Lowy Institute; OECD
	R&D spending (% of GDP)	Gross domestic expenditure on R&D as a share of GDP (latest year available); UNESCO; Taiwan Statistical Data Book; Lowy Institute
	Nobel prizes (sciences)	High achievements in physics, chemistry, and physiology or medicine (1990–2023); NobelPrize.org
	Supercomputers	Number of supercomputers in the global top 500 (2023); Top 500.org; HPC 100
	Satellites launched	Satellites launched by country of ownership or operation (2019–23); Union of Concerned Scientists Satellite Database
	Renewable energy	Annual electricity generation from renewables, gigawatt hours (2022); International Energy Agency; Lowy Institute; US Energy Information Administation
Connectivity **20%**	Global exports	Exports of goods and services, current dollars (2022); World Bank; UN Comtrade; Observatory of Economic Complexity
	Global imports	Imports of goods and services, current dollars (2022); World Bank; UN Comtrade; Observatory of Economic Complexity
	Global investment outflows	Three-year cumulative flows of outward foreign capital investment (2020–23); FDI Markets; Lowy Institute
	Global investment inflows	Three-year cumulative flows of inward foreign capital investment (2020–23); FDI Markets; Lowy Institute
	Merchant fleet	Total fleet, dead-weight tons (2023); UN Conference on Trade and Development
	Travel hubs	Direct international routes from principal airport hub (2024); Lowy Institute; Flights From.com

MILITARY CAPABILITY

Sub-measure	Indicators	Technical description
Defence spending **20%**	Military expenditure, market exchange rates	Estimated military expenditure, current dollars (2024); Lowy Institute; US Bureau of Arms Control, Verification and Compliance
	Military expenditure, defence sector PPP	Estimated military expenditure at defence sector purchasing power parity, current prices (2024); Lowy Institute; US Bureau of Arms Control, Verification and Compliance
Armed forces **20%**	Military and paramilitary forces	Active military and paramilitary personnel (2024); IISS Military Balance 2024
	Training, readiness and sustainment	Expert survey: Training and preparedness for sustained operations in the event of interstate conflict, two-year rolling average, 0–100 (2022–24); Lowy Institute
	Organisation: Combat experience	Expert survey: Combat experience relevant to the ability of armed forces to engage in interstate conflict, two-year rolling average, 0–100 (2022–24); Lowy Institute
	Organisation: Command and control	Expert survey: Exercise of authority and direction over armed forces in the event of an interstate conflict, two-year rolling average, 0–100 (2022–24); Lowy Institute
Weapons and platforms **25%**	Land warfare: Manoeuvre	Proxy: Main battle tanks and infantry fighting vehicles (2024); IISS Military Balance 2024
	Land warfare: Firepower	Proxy: Attack helicopters, used in close air support for ground troops (2024); IISS Military Balance 2024
	Maritime warfare: Sea control	Proxy: Principal surface combatants — frigates, destroyers, cruisers and carriers (2024); IISS Military Balance 2024
	Maritime warfare: Firepower	Proxy: Missile vertical launching cells on board surface combatants and submarines (2024); IISS Military Balance 2024
	Maritime warfare: Sea denial	Proxy: Tactical submarines (2024); IISS Military Balance 2024
	Air warfare: Fighters	Fighter/ground attack aircraft (2024); IISS Military Balance 2024
	Air warfare: Enablers	Proxy: Transport aircraft, airborne early warning and control (AEW&C) aircraft, and intelligence, surveillance and reconnaissance (ISR) aircraft (2024); IISS Military Balance 2024
	Technology, maintenance and range	Expert survey: Technology, maintenance and range of weapons systems, equipment and materiel, two-year rolling average, 0–100 (2022–24); Lowy Institute
Signature capabilities **25%**	Ground-based missile launchers	Launching platforms for intercontinental ballistic missiles (ICBM), intermediate-range ballistic missiles (IRBM), medium-range ballistic missiles (MRBM), short-range ballistic missiles (SRBM), and ground-launched cruise missiles (GLCM) (2024); IISS Military Balance 2024
	Ballistic missile submarines	Ballistic missile submarines (2024); IISS Military Balance 2024
	Long-range maritime force projection	Proxy: Carriers and principal amphibious ships (2024); IISS Military Balance 2024
	Area denial capabilities	Expert survey: Air defence, anti-naval, and intelligence, surveillance, reconnaissance and targeting capabilities, two-year rolling average, 0–100 (2022–24); Lowy Institute
	Intelligence capabilities	Expert survey: Institutional know-how, overseas reach, personnel and technological sophistication of intelligence agencies, two-year rolling average, 0–100 (2022–24); Lowy Institute
	Cyber capabilities	Expert survey: Defensive and offensive cyber capabilities, two-year rolling average, 0–100 (2022–24); Lowy Institute

Asian military posture **10%**	Ground forces deployment	Expert survey: Ability of ground forces to deploy with speed and for a sustained period in the event of a major continental military confrontation in the Asia-Pacific region, two-year rolling average, 0–100 (2022–24); Lowy Institute
	Naval deployment	Expert survey: Ability of the navy to deploy with speed and for a sustained period in the event of a major maritime military confrontation in the Asia-Pacific region, two-year rolling average, 0–100 (2022–24); Lowy Institute

RESILIENCE

Sub-measure	Indicators	Technical description
Internal stability **17.5%**	Government effectiveness	Government effectiveness: Worldwide Governance Indicators; percentile rank, 0–100 (2022); Worldwide Governance Indicators
	Political stability	Political stability and absence of violence/terrorism: Worldwide Governance Indicators; percentile rank, 0–100 (2022); Worldwide Governance Indicators
	Climate change resilience	Resilience to threats relating to food risk, water risk, temperature anomalies and natural disasters; global rankings (2023); Ecological Threat Register
	Internal conflict years	Number of years since 1946 in which at least one internal armed conflict resulted in 25 or more battle-related deaths (1946–2022); Uppsala Conflict Data Program
	High-intensity internal conflict years	Number of years since 1946 in which at least one internal armed conflict resulted in 1,000 or more battle-related deaths (1946–2022); Uppsala Conflict Data Program
	Infant mortality	Number of infants dying before reaching one year of age, per thousand live births (2022); World Bank; CIA World Factbook
	Covid-19 vaccinations	Doses of Coronavirus (Covid-19) vaccines administered per hundred people; Our World in Data
Resource security **17.5%**	Energy trade balance	Net energy exports in million tonnes of oil equivalent, Mtoe (2022); International Energy Agency; Asia-Pacific Economic Cooperation (for PNG)
	Energy self-sufficiency	Primary energy production as a share of total primary energy use (2022); International Energy Agency; Asia-Pacific Economic Cooperation (for PNG)
	Fuel trade balance	Net exports of refined petroleum, current dollars (2022); Observatory of Economic Complexity
	Fuel security	Deficit of refined petroleum as a proportion of GDP (2022); Lowy Institute; Observatory of Economic Complexity (Fuel Trade); World Bank (XR for North Korea Imputation); IMF (GDP)
	Rare-earth metals supply	Mining production of rare-earth metals, tonnes (2023); US Geological Survey
Geoeconomic security **17.5%**	Diversity of export products	Total products exported to at least one foreign market with a value of at least US$10,000 (2023); World Bank World Integrated Trade Solution (WITS) database
	Diversity of export markets	Foreign markets to which exporter ships at least one product with a value of at least US$10,000 (2023); World Bank World Integrated Trade Solution (WITS) database
	Dependency on global trade	Trade measured as a proportion of GDP (2022); World Bank; UN Comtrade; Bank of Korea; IMF; Observatory of Economic Complexity; Lowy Institute
	Dependency on primary trade partner	Two-way trade with primary trade partner as a share of total trade (2022); IMF Direction of Trade Statistics
Geopolitical security **17.5%**	Population relative to neighbours	Population as a share of neighbouring country populations: weighted at 100% for neighbouring countries with land borders; 75% for neighbouring countries divided by a strait; 25% for neighbouring countries with touching or overlapping claimed EEZ boundaries (2022); Lowy Institute; World Bank

Geopolitical security **17.5%** **(continued)**	Landmass deterrent	Country landmass, square kilometres (2021); World Bank; Taiwan Statistical Data Book
	Demographic deterrent	Total population (2022); World Bank; Taiwan Statistical Data Book
	Interstate conflict legacies	Years of interstate conflict with neighbouring Index countries as a primary party (1948–2023); Uppsala Conflict Data Program; Lowy Institute
	Boundary disputes	Overlapping territorial claims and/or unresolved land border and maritime demarcations (2024); Lowy Institute
Nuclear deterrence **30%**	Nuclear weapons capability	States with nuclear weapons (2024); Lowy Institute
	Nuclear weapons range	Maximum estimated nuclear missile range, kilometres (2021); CSIS Missile Defense Project; Lowy Institute
	Ground-based nuclear missile launchers	Launching platforms for intercontinental ballistic missiles (ICBM), intermediate-range ballistic missiles (IRBM), medium-range ballistic missiles (MRBM), short-range ballistic missiles (SRBM), and ground-launched cruise missiles (GLCM) containing nuclear warheads (2024); IISS Military Balance 2024
	Nuclear second-strike capability	Proxy: Ballistic missile submarines (2024); IISS Military Balance 2024

FUTURE RESOURCES

Sub-measure	Indicators	Technical description
Economic resources 2030 **25%**	GDP baseline	Estimated GDP at purchasing power parity, current prices (2024); Lowy Institute; IMF; USDA
	GDP forecast 2035	GDP forecast at purchasing power parity, constant 2024 prices (2035); Lowy Institute
	Economic capability 2035	Beckley formula: GDP by GDP per capita forecast at purchasing power parity, 0–100 (2035); Lowy Institute
Defence resources 2030 **25%**	Military expenditure baseline	Estimated military expenditure at defence sector purchasing power parity, current prices (2024); Lowy Institute; SIPRI Military Expenditure Database
	Military expenditure forecast 2035	Estimated military expenditure forecast at defence sector purchasing power parity, constant 2024 prices (2035); Lowy Institute
	Military capability enhancement 2024–35	Forecast absolute increase in military expenditure above existing levels at estimated defence sector purchasing power parity, constant 2024 prices (2024–35); Lowy Institute
Broad resources 2030 **30%**	Estimated broad resources 2035	Estimated aggregate score for economic resources, military capability and resilience measures based on GDP and military expenditure trends, 0–100 (2035); Lowy Institute
Demographic resources 2050 **20%**	Working-age population baseline	Total working-age population, 15–64 (2024); UN Population Division; Lowy Institute
	Working-age population forecast 2050	Medium variant forecast for total working-age population, 15–64 (2050); UN Population Division; Lowy Institute
	Labour dividend 2024–50	Forecast gains in working-age population, adjusted for quality of the workforce and climate change resilience (2024–50); quality is proxied by GDP per worker in 2024 at purchasing power parity; Lowy Institute

ECONOMIC RELATIONSHIPS

Sub-measure	Indicators	Technical description
Regional trade relations **35%**	Trade with region	Total value of trade with Index countries, current dollars (2022); IMF Direction of Trade Statistics; Lowy Institute
	Primary trade partner	Number of Index countries in which state is the primary regional trading partner (2022); IMF Direction of Trade Statistics; Lowy Institute
	Regional selling power	Average imports share in 26 other Index countries (2022); IMF Direction of Trade Statistics; Lowy Institute
	Regional buying power	Average exports share in 26 other Index countries (2022); IMF Direction of Trade Statistics; Lowy Institute
Regional investment ties **35%**	Foreign investment in region	Ten-year cumulative flows of outward foreign capital investment in Index countries (2014–23); FDI Markets; Lowy Institute
	Primary foreign investor	Index countries in which state is the primary regional inward foreign direct investor, based on ten-year cumulative flows of foreign capital investment (2014–23); FDI Markets; Lowy Institute
	Average share of foreign investment	Average share of inward foreign direct investment in 26 other Index countries, based on ten-year cumulative flows of foreign capital investment (2014–23); FDI Markets; Lowy Institute
	Investment attractiveness	Ten-year cumulative flows of inward foreign capital investment (2014–23); FDI Markets; Lowy Institute
Economic diplomacy **30%**	Global FTAs	Bilateral and multilateral free trade agreements concluded by Index countries with other countries (2024); World Trade Organization; Lowy Institute
	Regional FTAs	Bilateral and multilateral free trade agreements concluded with Index countries (2024); World Trade Organization; Lowy Institute
	Foreign assistance (global)	Annual overseas development assistance (ODA) and other official flows (OOF), constant US dollars (2022); OECD; AidData
	Foreign assistance (regional)	Annual overseas development assistance (ODA) and other official flows (OOF) to the 26 other Index countries, constant US dollars (2022); OECD; AidData; Lowy Institute

DEFENCE NETWORKS

Sub-measure	Indicators	Technical description
Regional alliance network **40%**	Regional military alliances	Number of codified alliances between Index countries, including a mutual defence clause or actionable security guarantee (2024); Lowy Institute; Alliance Treaty Obligations and Provisions Project
	Allied foreign forces	Allied military personnel deployed in Index countries: minimum of 50 personnel deployed on a permanent or semi-permanent rotational basis (2024); Lowy Institute; IISS Military Balance 2024
	Joint training (allies)	Number of bilateral and multilateral joint training exercises conducted with allied Index countries (2022–23); Lowy Institute
	Combined operation years (allies)	Cumulative years fought alongside allied Index countries in individual conflicts, as a primary or supporting party (1948–2023); Uppsala Conflict Data Program
	Arms procurements (allies)	Arms imports from allied Index countries expressed in SIPRI Trend Indicator Values (2014–2023); SIPRI Arms Transfer Database
	Alliance force multiplier	Ratio of combined allied military capabilities to autonomous military capability (2024); Lowy Institute

Regional defence diplomacy 40%	Defence Dialogues	Number of bilateral and plurilateral defence diplomacy meetings held between Index countries (2023); Lowy Institute
	Defence consultation pacts	Defence consultation pacts between non-allied Index countries (2024); Lowy Institute
	Foreign forces and deployments	Military personnel deployed to and from non-allied Index countries: minimum of 50 personnel deployed on a permanent or semi-permanent rotational basis (2024); Lowy Institute; IISS Military Balance 2024
	Joint training (non-allies)	Number of bilateral and multilateral joint training exercises conducted with non-allied Index countries (2022–23); Lowy Institute
	Combined operation years (non-allies)	Cumulative years fought alongside non-allied Index countries in individual conflicts, as a primary or supporting party (1948–2023); Uppsala Conflict Data Program
	Arms procurements (non-allies)	Arms imports from non-allied Index countries expressed in SIPRI trend indicator values (2014–2023); SIPRI Arms Transfers Database
Global defence partnerships 20%	Global arms trade	Annual arms imports and exports, expressed in SIPRI trend indicator values (2023); SIPRI Arms Transfers Database
	Arms export partnerships	Number of arms export recipients, including state and non-state groups (2018–23); SIPRI Arms Transfers Database

DIPLOMATIC INFLUENCE

Sub-measure	Indicators	Technical description
Diplomatic network **33%**	Embassies (regional)	Number of embassies, high commissions and permanent missions in Index countries (2024); Lowy Institute Global Diplomacy Index
	Embassies (global)	Number of embassies, high commissions and permanent missions globally (2024); Lowy Institute Global Diplomacy Index
	Second-tier diplomatic network (regional)	Consulates and other representative offices in Index countries (2024); Lowy Institute Global Diplomacy Index
Multilateral power **33%**	Summits, clubs and organisations	Membership in select summits, diplomatic clubs and regional intergovernmental organisations (2023–24); Lowy Institute
	Institutional voting shares	Average voting shares by subscribed capital in major multilateral development banks (2023); Lowy Institute
	UN capital contributions	Net capital contributions to the United Nations Secretariat, share of global total (2023); UN Official Document System
	Voting alignment	Voting alignment with other Index countries in adopted United Nations General Assembly resolutions (2022–23); UN Digital Library
	Voting partners	Times country featured among top three voting partners for other Index countries in United Nations General Assembly (2022–23); UN Digital Library
	Diplomatic Dialogues (Multilateral)	Number of plurilateral and multilateral diplomatic dialogues held between Index countries (2023) at leader or foreign minister level; Lowy Institute
Foreign policy **33%**	Political leadership (regional)	Expert survey: Efficacy of political leaders in advancing their country’s diplomatic interests in Asia, 0–100 (2024); Lowy Institute
	Political leadership (global)	Expert survey: Efficacy of political leaders in advancing their country’s diplomatic interests globally, 0–100 (2024); Lowy Institute

Foreign policy **33%** **(continued)**	Strategic ambition	Expert survey: Extent to which political leaders demonstrate strategic ambition, two-year rolling average, 0–100 (2022–24); Lowy Institute
	Diplomatic service	Expert survey: Efficacy of country's diplomatic service and wider foreign policy bureaucracy, two-year rolling average, 0–100 (2022–24); Lowy Institute
	Diplomatic Dialogues (Bilateral)	Number of bilateral diplomatic dialogues held between Index countries at leader or foreign minister level (2023); Lowy Institute
	Diplomatic Dialogues (Convening Power)	Number of visits to Index country by leaders or foreign ministers of other Index countries (2023). Excludes attendance to rotating multilateral conferences; Lowy Institute

CULTURAL INFLUENCE

Sub-measure	Indicators	Technical description
Cultural projection **40%**	Online search interest	Online interest for a given Index country in 26 other Index countries; average percent of total Google and Baidu searches for selected countries (2022–23); Lowy Institute; Google trends; Baidu
	Cultural exports	Exports of cultural services, current dollars (2022); UN Conference on Trade and Development; UNESCO
	Global brands	Number of brands in the Global 500 (2024); Brand Directory
	Prestige: Skyscrapers	Buildings in financial capital above 150 metres in height (2023); Council on Tall Buildings and Urban Habitat
	Status: Visa-free travel	Number of countries that citizens can travel to visa-free (2024); Henley & Partners
	Cultural heritage	UNESCO World Heritage listed sites (2023); UNESCO
Information flows **30%**	Asia-Pacific international students	International students enrolled in tertiary education from 26 other Index countries (2022); UNESCO; ICEF Monitor; Institute of International Education; Lowy Institute
	Regional influence: News agencies	Online interest for a given Index country's news agency in 26 other Index countries; average percent of total online searches for selected news agencies (2022–23); Lowy Institute; Google Trends
	Regional influence: Newspapers	Online interest for a given Index country's national newspaper in 26 other Index countries; average percent of total online searches for selected newspapers (2022–23); Lowy Institute; Google Trends
	Regional influence: TV broadcasters	Online interest for a given Index country's international television broadcaster(s) in 26 other Index countries; average percent of total online searches for selected television broadcasters (2022–23); Lowy Institute; Google Trends
	Regional influence: Radio broadcasters	Online interest for a given Index country's public radio broadcaster(s) in 26 other Index countries; average percent of total online searches for selected radio broadcasters (2022–23); Lowy Institute; Google Trends
People exchanges **30%**	Diaspora influence	Average share of total immigrant populations resident in 26 other Index countries from the given Index country of origin (2020); Lowy Institute; UN Department of Economic and Social Affairs; Taiwan Overseas Community Affairs Council
	Migrant drawing power	Average share of global migrant populations from 26 other Index countries of origin settled in the given Index country (2020); Lowy Institute; UN Department of Economic and Social Affairs;
	Regional travel destination	Arrivals of non-resident visitors from 26 other Index countries at national borders (2022); UN World Tourism Organization; Lowy Institute
	Regional travel connectivity	Direct international flight routes from principal airport hubs of Index countries (July 2024); Lowy Institute; Flights From.com

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