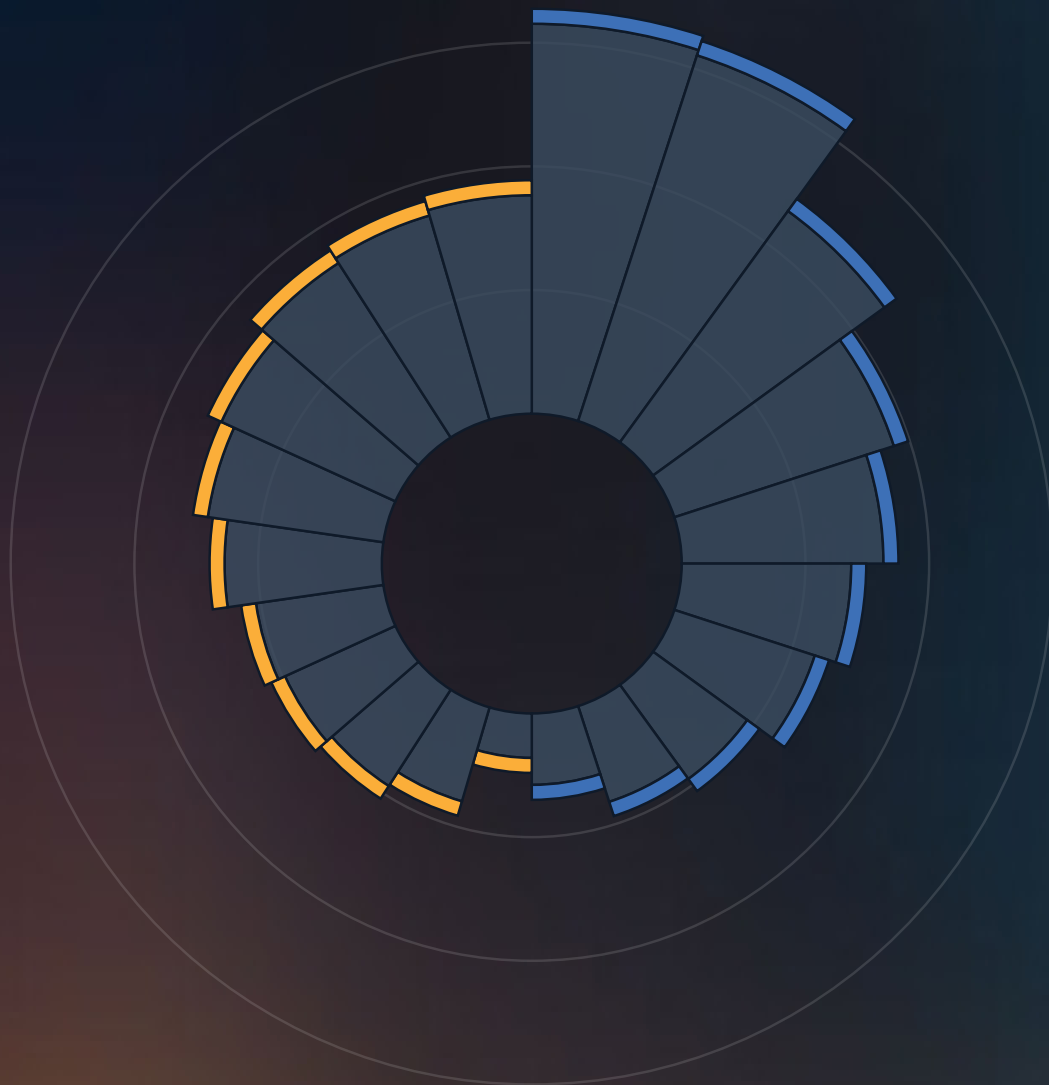




**LOWY INSTITUTE**  
**Southeast Asia Influence Index**

**KEY FINDINGS REPORT**



SUSANNAH PATTON  
JACK SATO  
RAHMAN YAACOB



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# Contents

<b>Introduction</b>	<b>2</b>
<b>Key findings</b>	<b>3</b>
<b>Geographic scope</b>	<b>5</b>
<b>Analysis: Southeast Asia’s dynamic geopolitics</b>	<b>6</b>
China is everywhere in Southeast Asia	7
America’s two faces	8
Southeast Asia’s collective dynamic	10
Japan leads the Indo-Pacific powers	12
Long-distance relationships	14
Diversification with dependence	15
<b>Measures of influence</b>	<b>17</b>
<b>Methodology</b>	<b>22</b>
<b>About the authors</b>	<b>30</b>

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Project Lead: Susannah Patton  
Key findings by Susannah Patton and Jack Sato

Researchers: Jack Sato, Rahman Yaacob, and Susannah Patton

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# Introduction

Southeast Asia is one of the most geopolitically diverse and contested regions of the world. Lying at the fulcrum between the Indian and Pacific oceans, it encompasses a key maritime geography of interest to the region's superpowers and middle powers alike. Its size and economic dynamism — with a population of almost 700 million people and a combined GDP nearing US\$4 trillion — add to its global strategic importance.

The Southeast Asia Influence Index maps the landscape of geopolitical influence in this crucial region. Building on an existing body of data-driven research by the Lowy Institute, particularly the Asia Power Index, this new project is the first comprehensive assessment of the influence of major powers in the eleven countries of Southeast Asia.

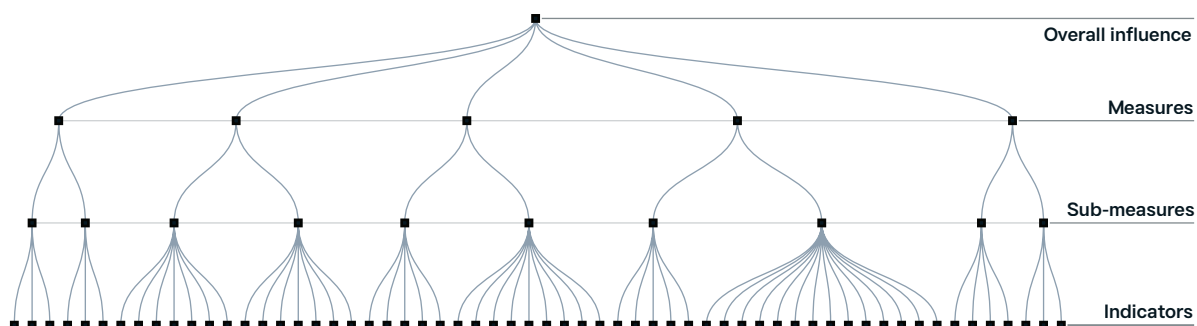
Existing studies on the geopolitics of Southeast Asia focus extensively on the concept of influence, particularly the relative influence of the United States and China. However, few define, let alone compare, influence except through public or elite opinion polling. Such surveys can produce a circular logic: whichever country is said to be the most influential is in fact the most influential because it is said to be so.

The Southeast Asia Influence Index defines influence as the capacity of a partner country to shape or affect the behaviour of Southeast Asian countries by

non-kinetic means. Rather than seeking to measure or compare the exertion of influence, the focus of this study is on activities capable of generating influence.

This project measures the relative importance of ten external partners to the eleven countries of Southeast Asia, across five thematic measures of influence: economic relationships, defence networks, cultural influence, diplomatic relationships, and regional engagement. The Index methodology enables the comparison of diverse data points, with partners' overall influence, and influence for each measure and indicator, measured on a scale from zero to 100.

While the project provides insight on the state of US-China competition in Southeast Asia, the inclusion of this wider range of external partners — such as Australia, India, and Japan — acknowledges the diversity of Southeast Asian countries' external relationships. The project also captures the relationships between Southeast Asian countries, recognising that in many cases, intra-regional dynamics and neighbourhood links are as important or more so than those with external partners.



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## Key findings

### 1. China is everywhere in Southeast Asia

China is a consistent presence across every Southeast Asian country. It is the region's leading, but not dominant, external partner.

### 2. America's two faces

The United States is the second-most influential partner for the region, but its influence varies wildly. The Trump administration's policies will further erode US influence in Southeast Asia.

### 3. Southeast Asia's collective dynamic

Collectively, Southeast Asian countries are more important to each other than to any external partner. Intra-regional dynamics, especially relations between direct neighbours, often matter more than competition among external powers.

### 4. Japan leads the Indo-Pacific powers

Beyond the United States and China, four Indo-Pacific powers — Australia, India, Japan, and South Korea — exercise influence in Southeast Asia. But only Japan has a multidimensional presence across the entire region.

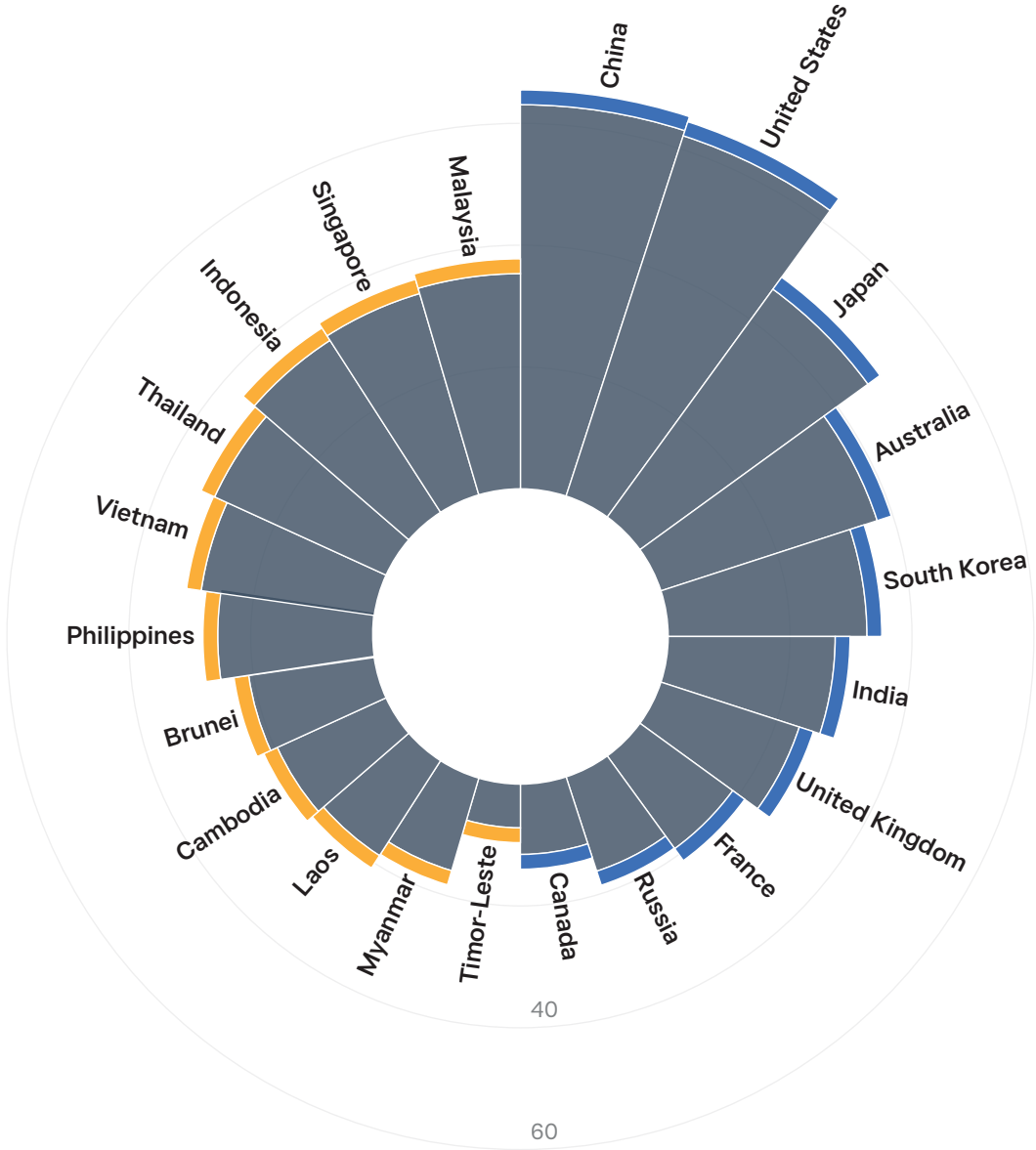
### 5. Long-distance relationships

Southeast Asia's next tier of partners from outside the region — Canada, France, Russia, and the United Kingdom — are peripheral players. Yet when focused tightly on geographic or thematic areas of strength, these countries can exert sharp influence.

### 6. Diversification with dependence

No Southeast Asian country is within the uncontested sphere of influence of a single external partner, but several countries are highly exposed to China in specific sectors such as tourism, investment, or trade.

China and the United States  
Overall influence scores (2025)



■ Intra-regional

■ Extra-regional

Southeast Asian countries' influence on each other

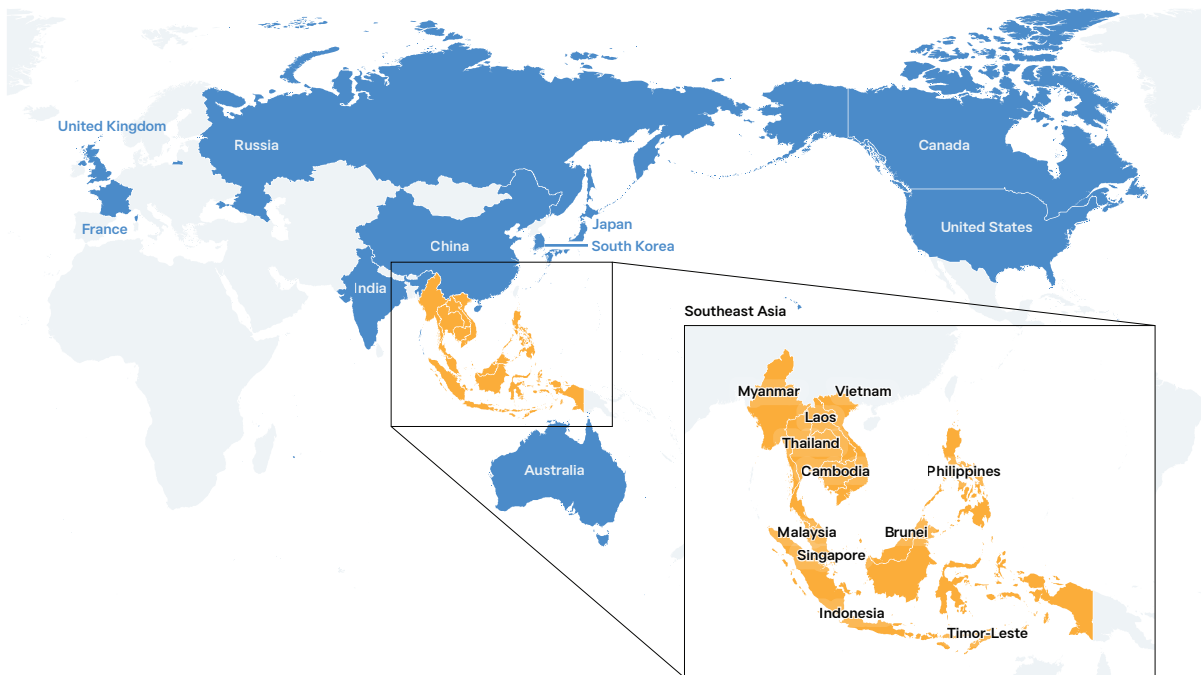
Influence of partners from outside Southeast Asia

Explore the influence scores and rankings across each country at [influence.lowyinstitute.org](https://influence.lowyinstitute.org)

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## Geographic scope

The geographic scope of the project reflects the membership of the Association of Southeast Asian Nations (ASEAN) and a selection of ASEAN's formal dialogue partners possessing sufficient strategic weight to exert influence in the region.



Note: The selection of partners within the scope of the study was informed by several factors, including membership of regional multilateral institutions, trade and economic linkages with the region, and consultation with experts to identify those partners capable of exerting a strategic effect.

### Explore the Southeast Asia Influence Index online

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

Detailed reports on individual Southeast Asian countries, external partners, key relationships, and drill-down explorations of each measure and indicator establish the Southeast Asia Influence Index as an indispensable tool for understanding the geopolitics of Southeast Asia.

[influence.lowyinstitute.org](https://influence.lowyinstitute.org)

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# Analysis: Southeast Asia's dynamic geopolitics

Southeast Asia is one of the most geopolitically contested regions of the world. It engages the interest of superpowers China and the United States, Indo-Pacific middle powers like Australia, India, Japan, and South Korea, and those from further afield, including European countries.

The Southeast Asia Influence Index shows a region in which China looms large, everywhere. China is the most influential power overall, and the leading power for most countries. It leads with economic relationships but backs this with consistent diplomacy across the region. The United States, by contrast, shows two differing faces in Southeast Asia. In the Philippines and Singapore, it is the essential defence and security partner, a highly relevant and visible presence. But in much of the region, especially the smaller countries of mainland Southeast Asia such as Cambodia and Laos, the United States is a more peripheral presence. Diplomacy and economic engagement are patchy. The global policies of the Trump administration on tariffs, aid cuts, and international education are only likely to accentuate the disconnect between the United States and these countries.

Yet China does not dominate; the region has its own strategic dynamics that will confound the efforts of any external power to draw it into an uncontested sphere of influence. Collectively, Southeast Asian countries are more important to each other than to any external partner, an affirmation of the steady co-operation built within ASEAN since it was formed in 1967. While such dynamics are often overlooked by external observations of Southeast Asia, this research highlights that in several smaller Southeast Asian countries, neighbourhood relations, not US–China competition, are the prevailing influence. However, this is not the case across the board. Some countries, especially the Philippines, are looking increasingly to

partnerships from outside the region to mitigate the risk of coercion by China.

While four external middle powers play a major role in Southeast Asia, only Japan has a multidimensional presence across the region. Japan is a longstanding presence in Southeast Asia — in many cases predating China's economic influence. Tokyo has also grown in importance in recent years as a provider of regional security assistance, as well as economic engagement. Australia, India, and South Korea are also important partners but their influence varies across countries and sectors. Canberra and Seoul have influence that is concentrated in economic relationships and defence networks respectively. In the case of New Delhi, practical follow-through with Southeast Asian countries often lags behind the pace of announced initiatives and cooperative frameworks.

European countries, as well as Canada, have shown greater interest in Southeast Asia in recent years, as part of broader efforts to engage with the Indo-Pacific and deepen their regional relationships beyond ties with China. They are not central players in the region but with targeted strategies can exercise influence in niche areas. The United Kingdom is important for its continued cultural influence and engagement with former Commonwealth countries. Russia's footholds include its defence exports to mainland Southeast Asia and its dissemination of information through new and old media platforms, including Sputnik radio.

The net effect is that most Southeast Asian countries can reasonably claim to have well diversified international relationships, in the sense that they work with different partners across different domains. However, pockets of dependency on China exist within sectors such as tourism, education, trade, and investment.



## 1. China is everywhere in Southeast Asia

**China is a consistent presence across every Southeast Asian country. It is the region's leading, but not dominant, external partner.**

China's hegemony over Southeast Asia is often portrayed as a foregone conclusion. The Southeast Asia Influence Index "right-sizes" our understanding of China's role in Southeast Asia, identifying it as the region's leading, but not dominant, external partner.

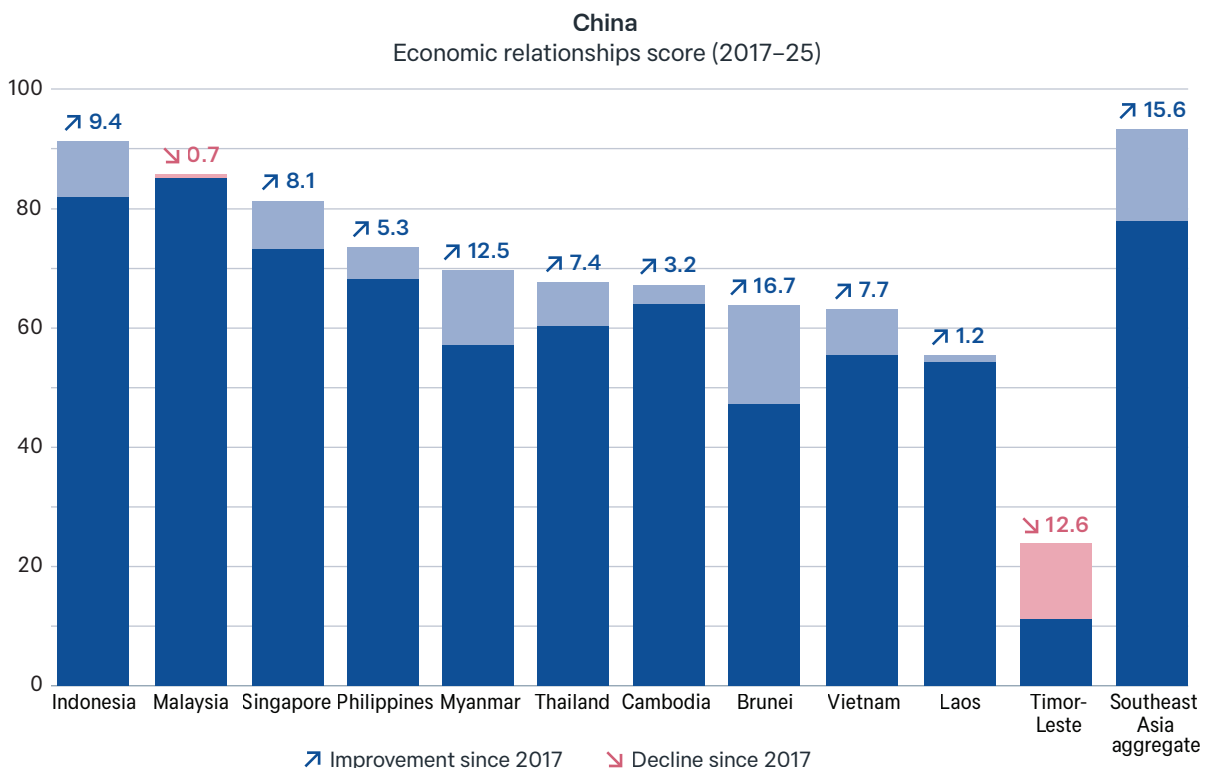
China has an overall influence score of 65 out of 100, a one-point lead over its nearest rival, the United States. It is the most influential power in six out of the eleven Southeast Asian countries (Cambodia, Indonesia, Malaysia, Myanmar, Thailand, and Vietnam).

Our study confirms that economic influence is Beijing's strongest card in Southeast Asia. Its score for this measure is nearly double that of the United States. It is the most important economic partner for all individual countries except Laos (where Thailand leads, by

virtue of its trade relationship) and Timor-Leste, where Beijing continues to have a minimal footprint.

China is the region's leading export market — taking around 20 per cent of all exports, compared to 16 per cent going to the United States — and is responsible for around 26 per cent of the region's imports. It is also an increasingly important source of private investment for the region, accounting for 21 per cent of new project investment in Southeast Asia over the past ten years (2015–24) compared to just 13 per cent over the ten-year period to 2017, when Japan was the largest foreign investor in the region. China is the region's leading source of development assistance loans, although its share of lending to the region has declined since 2017, in line with a global trend of reduced Chinese overseas lending. It is a much less important source of development assistance grants, accounting for less than 12 per cent of all grants in 2021–23.

China capitalises on its economic presence through a high tempo of traditional diplomacy with Southeast Asia. It is the leading destination for visits from Southeast Asian leaders and foreign ministers, and



China's leader and foreign minister are the most frequent visitors of their rank to Southeast Asia from outside the region. It has declared the equivalent of a comprehensive strategic partnership with every country except the Philippines, more than any other partner. Its diplomatic network is the most extensive of any partner in the region, with 16 Chinese consulates in regions outside Southeast Asian capital cities. China also hosts 54 consulates from Southeast Asia across its provinces.

However, China's presence does not dominate Southeast Asia, in that it is not the primary partner for the region across all domains of influence. For instance, it still does not have well-developed defence networks with most countries. On only one indicator, arms procurement, is Beijing a significant player, ranking as the third-most important supplier of arms to the region after Russia and the United States. Overwhelmingly, these exports go to mainland Southeast Asian countries, where China accounts for more than 20 per cent of all arms imports; the figure is around two per cent in maritime Southeast Asia. China's defence presence is more prominent in mainland Southeast Asia, especially Cambodia and Laos, however this is more a function of the relative absence of other partners than clear Chinese prioritisation of these partnerships.

China is the leading partner for people flows, reflecting its position as the top source of both foreign tourists and students studying in Southeast Asia. However, its information projection through TV, radio, newspapers, and news agencies remains weak, ranking just sixth on this sub-measure.

## 2. America's two faces

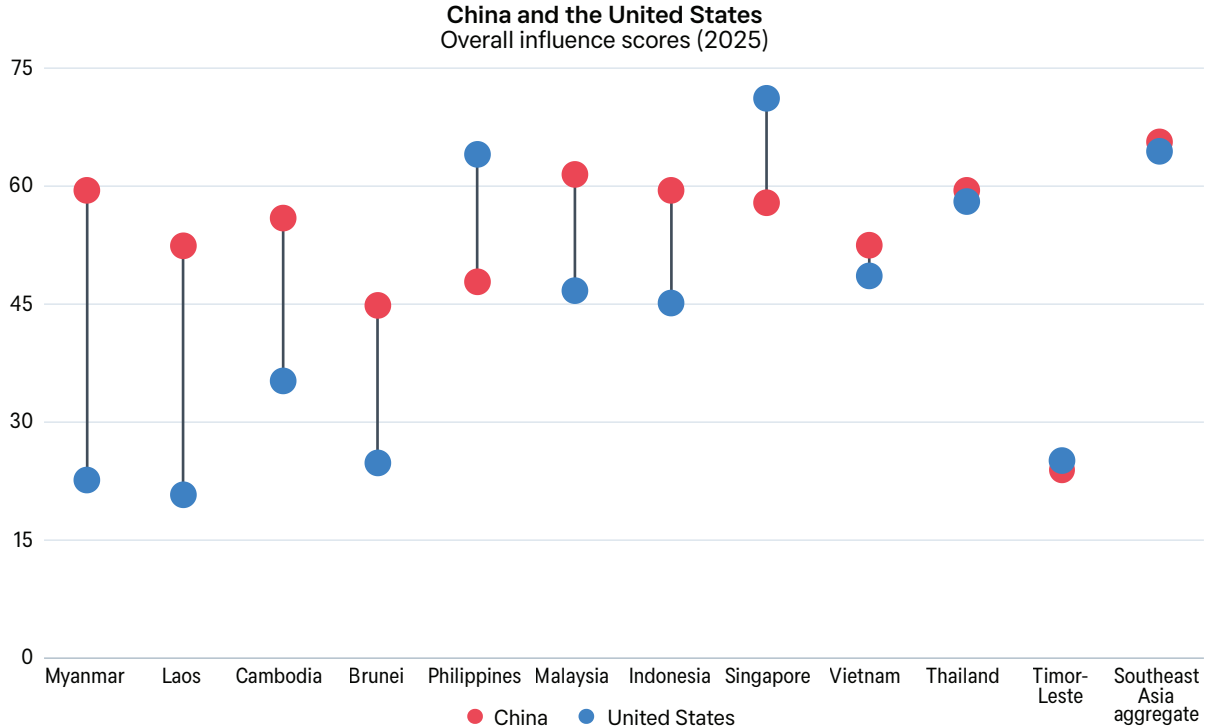
**The United States is the second-most influential partner for the region, but its influence varies wildly. The Trump administration's policies will further erode US influence in Southeast Asia.**

Narratives around the role of the United States in Asia are often polarised: on one end, the United States is seen as a distant and peripheral power, while at the other, Washington is the trusted and preferred partner, an essential balance against China. Both statements are true. For the Philippines and Singapore, the United States remains the leading power by a considerable margin. But in many countries, especially Brunei, Cambodia, Indonesia, Laos, Malaysia, and Myanmar, the United States is not an effective competitor to China.

The Southeast Asia Influence Index confirms that the Philippines-US alliance is at a high point since 2017. Washington is Manila's top partner on almost every defence-related indicator, with growth in combined military exercises, defence dialogues, and the institutionalisation of dialogue mechanisms. Washington's presence is augmented by the fact that Manila's next-most important partners, Australia, Japan, and South Korea, are also US allies.

Reflecting an upswing in alliance cooperation since 2021, the United States has invested in diplomacy with the Philippines, hosting the largest number of visits by President Ferdinand Marcos Jr and his Secretary of Foreign Affairs, a trend that began under US President Joe Biden but has continued under the Trump administration in 2025. And while both sides have committed to adding more economic cooperation to the alliance agenda, this project shows that the United States was already a relevant economic partner for the Philippines, ranking second as both an export destination and source of foreign investment over the past ten years, and the number one source of jobs created by foreign investment.

In Singapore, the US presence is a similar, positive story. The United States is the lead foreign investor and an important export market, as well as the



lead defence partner, a relationship that has only strengthened since 2017. In both Singapore and the Philippines, the United States is also the leading cultural influence, reflecting the reach of media flows and people exchanges. In both cases, these connections are so extensive that they are likely to survive Trump administration policies such as tougher visa screening requirements for international students.

However, this picture could not be more different in Malaysia, where China's influence outranks that of the United States by 15 points. The United States ranks just seventh for cultural influence, fourteenth for diplomatic influence, fifth for defence networks, and third for economic relationships. In terms of diplomatic contact, there was no high-level visit between the United States and Malaysia at leader or foreign minister to Secretary of State level in 2023–24 — part of a broader historical pattern in the relationship, in which leader-level engagement was the exception rather than the norm. Relatively few Malaysian students choose to study in the United States, a number

that has declined since 2017. And in terms of online search interest, the United States ranks just seventh, one simple indication that the United States faces a soft power challenge in Malaysia.

In the mainland Southeast Asian countries of Cambodia, Laos, and Myanmar, the gap between the influence of China and the United States is greater again. In Cambodia, China's influence is around 60 per cent greater than that of the United States. In Laos and Myanmar, it is around 150 per cent greater. In Cambodia and Laos, these results reflect the historical legacies of the Cold War, though US aid and support for civil society in Cambodia in the wake of the 1991 Paris Peace Accords created a larger and more positive American footprint there than in Communist Laos. In Myanmar's case, decades of military rule and international isolation have for the most part precluded US engagement, except during a reform period between 2011 and 2021 when the United States briefly expanded diplomatic and developmental ties.

The position of the United States in Southeast Asia is likely to erode further through the impact of the Trump administration's global policies. The United States will undoubtedly lose its position as the leading provider of foreign assistance grants to the region, as it has announced it will reduce its foreign assistance by 83 per cent. It will also likely lose its second-ranked position as a source of radio broadcasting, as Voice of America was forced to cut staff and stop foreign-language broadcasts in Southeast Asia.

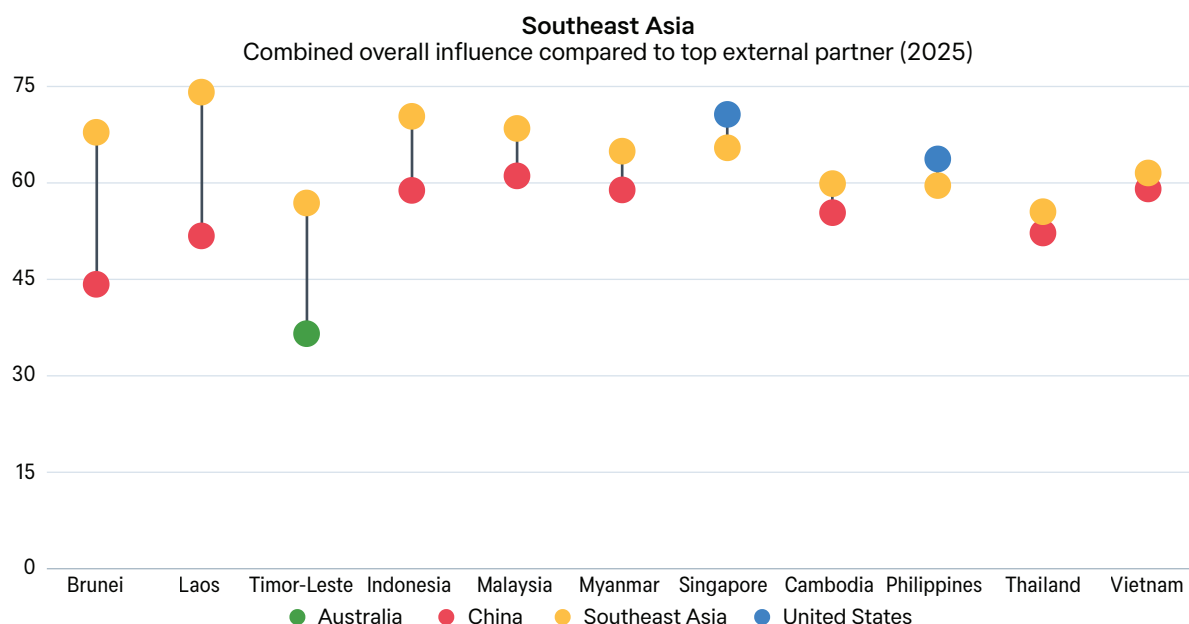
Restrictions on international students and more restrictive visa processes will likely curtail people exchanges between the United States and the region. The Trump administration's tariffs on Southeast Asia (mostly 19 or 20 per cent) will also shape the future of trade and investment ties between the United States and Southeast Asia, and may over time reduce the level of economic interaction between the region and the world's largest economy. In other areas, the Trump administration's policies may have less impact than many assume: US high-level diplomatic engagement with the region (beyond its close partners) was already limited under the Biden administration, while extensive defence cooperation looks set to continue in line with past practice.

### 3. Southeast Asia's collective dynamic

**Collectively, Southeast Asian countries are more important to each other than they are to any external partner. Intra-regional dynamics, especially relations between direct neighbours, often matter more than any single external partner.**

While China and the United States are the leading external partners for Southeast Asia, the Southeast Asia Influence Index demonstrates that collectively, Southeast Asian countries are more important to each other than any external partner. For instance, the collective influence of Southeast Asian countries on each other outstrips China's overall influence by around six per cent. This result affirms ASEAN's success in building habits of cooperation and deepening linkages among its members since the group was first formed in 1967.

The relative importance of neighbourhood relationships varies across the region and does not always align with the size of the countries involved. Indonesia, ASEAN's largest member, ranks just seventh for overall influence, and lower again in mainland Southeast Asian countries.



Instead, sub-regional dynamics and the influence of direct neighbours prevails. For example, China, Thailand, and Vietnam all have important sway in Laos. Despite China's position as Laos' largest external creditor, the country is a buffer state sitting between not one but three much larger neighbours. Thailand is the leading cultural and economic influence, while China and Vietnam vie for influence through diplomatic ties and defence networks.

For the region's two smallest countries, Brunei and Timor-Leste, neighbourhood relations also loom large. Malaysia is Brunei's most important partner overall, with deep cultural, monarchical, and trade ties, followed by Singapore, with which it has unusually close monetary and defence cooperation. For Timor-Leste, neighbouring Indonesia is by far the largest influence overall, driven by trade, investment, people exchanges, and information flows.

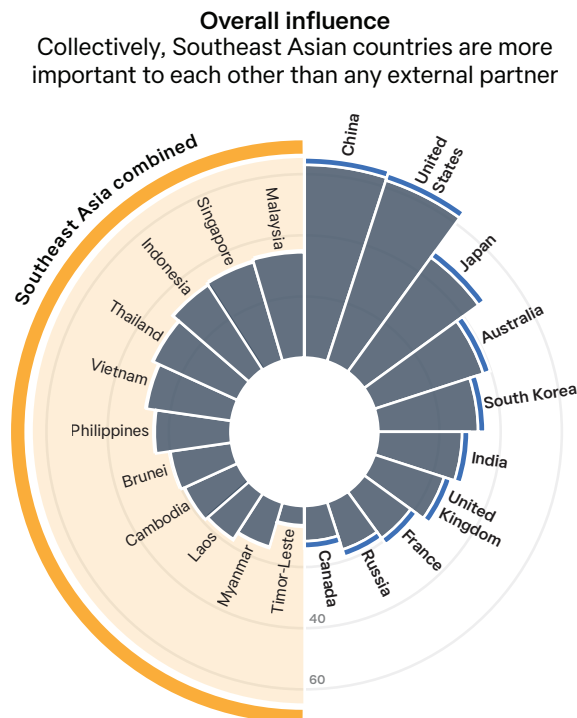
Sub-regional relationships are not always positive. Vietnam and Thailand are two important sources of influence in Cambodia, ranking second and third respectively. Yet Cambodia has historically resented and

felt threatened by these two larger neighbours. These dynamics came to the fore in 2025 when border conflict flared again between Thailand and Cambodia, and in 2024 when Cambodia withdrew from a sub-regional diplomatic arrangement, citing sovereignty concerns.

Even in some of Southeast Asia's largest countries, neighbourhood relationships are more substantial than many assume. Indonesia's relationship with Singapore, while not close and trusting like that between Singapore and Brunei, is deep and substantial, with the two countries top partners for each other in both defence diplomacy and traditional diplomatic engagement. Singapore Prime Minister Lawrence Wong was Indonesian President Prabowo's first official guest after Prabowo's inauguration in 2024. Singapore is also a top-three partner for Indonesia in terms of investment, trade, and people exchanges.

Some Southeast Asian countries, however, look more to partnerships from outside the region than within it. The Philippines is one of the only countries for whom an external partner — the United States — has greater influence than Southeast Asian partners collectively. In some ways, this is unsurprising; by virtue of its geography and history, the Philippines sits apart from its neighbours and has no natural "best friend" in ASEAN. But this trend has also accelerated under the Marcos administration, with the Philippines looking more to security partners from outside the region, in particular Australia, Japan, South Korea, and the United States, for support in its efforts to defend its sovereignty against China's incursions in its exclusive economic zone.

Albeit to a lesser extent than the Philippines, Vietnam also relies more heavily on extra-regional partnerships compared to its smaller neighbours, with China and Southeast Asian partners having roughly equal importance for Hanoi. While Hanoi eschews alliance relationships, it has pursued "omni-directional" diplomacy, establishing comprehensive strategic partnerships with all the external partners included in the scope of this study except the United Kingdom and Canada. These partnerships form part of Vietnam's strategy of diversifying its international relationships to avoid dependency on any one partner.



#### 4. Japan leads the Indo-Pacific powers

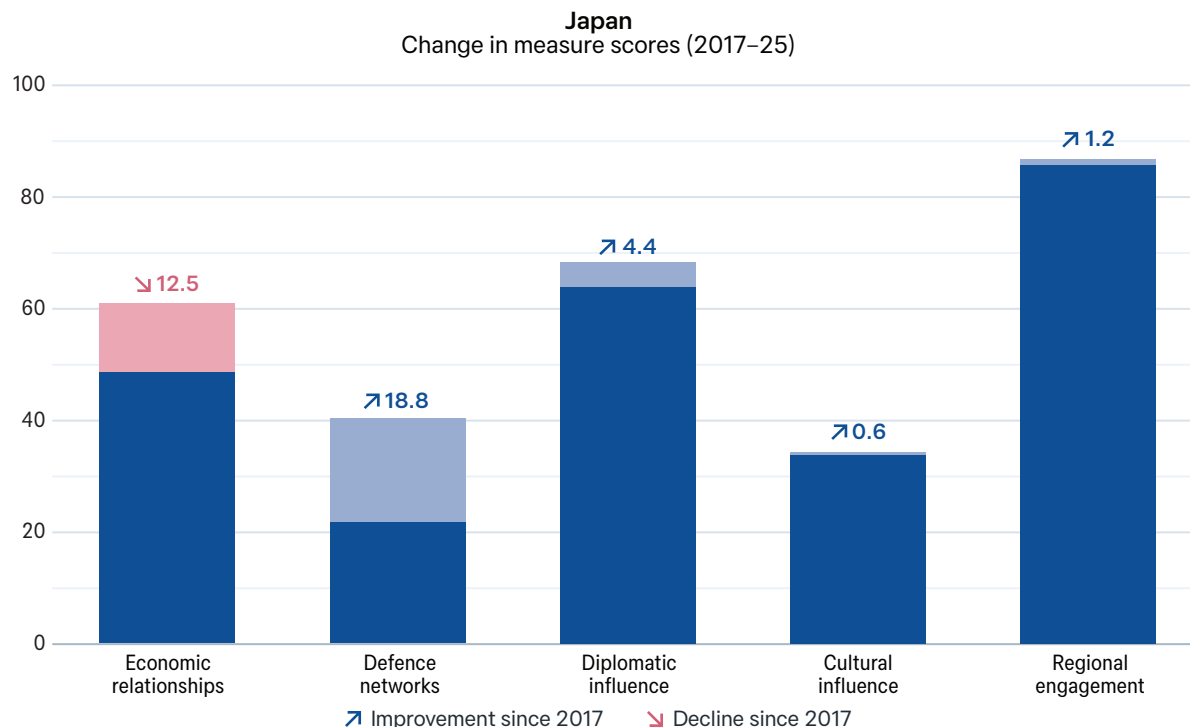
**Beyond the United States and China, four Indo-Pacific powers — Australia, India, Japan, and South Korea — exercise influence in Southeast Asia. But only Japan has a multidimensional presence across the entire region.**

Indo-Pacific powers beyond China and the United States have some importance to Southeast Asia. Japan and Australia rank third and fourth for overall influence, ahead of Malaysia, Singapore, and Indonesia. South Korea and India rank eighth and eleventh respectively, reflecting patchier engagement, both thematically and geographically.

The Southeast Asia Influence Index confirms the significance of Japan's longstanding presence in Southeast Asia, ranking it as the third-most important partner for the region after China and the United States, by a considerable margin (leading next-placed Australia by nine points).

Japan is the only partner other than the United States and China that is active across all domains of influence and across all Southeast Asian countries. Unlike South Korea or Australia, whose importance in each country varies considerably (from top three to outside the top ten), Japan ranks as a top-five partner for every Southeast Asian country except Timor-Leste. Overall, it has grown in importance as a partner for Southeast Asia since 2017. This has mostly been driven by an increase in Japan's diplomatic and defence engagement with the region, especially, but not only, with maritime Southeast Asian countries. Japan's trade and investment ties, while still substantial (ranking third in overall importance for each sub-measure), have declined in relative importance since 2017. Japan has also become a slightly less influential partner in terms of information flows and people exchanges.

This consistency is a contrast to the region's other potential heavyweight player, India. Despite its size, India ranks as just the 11th-most influential power in Southeast Asia. India's influence is strongest where its interests are most directly engaged. In neighbouring

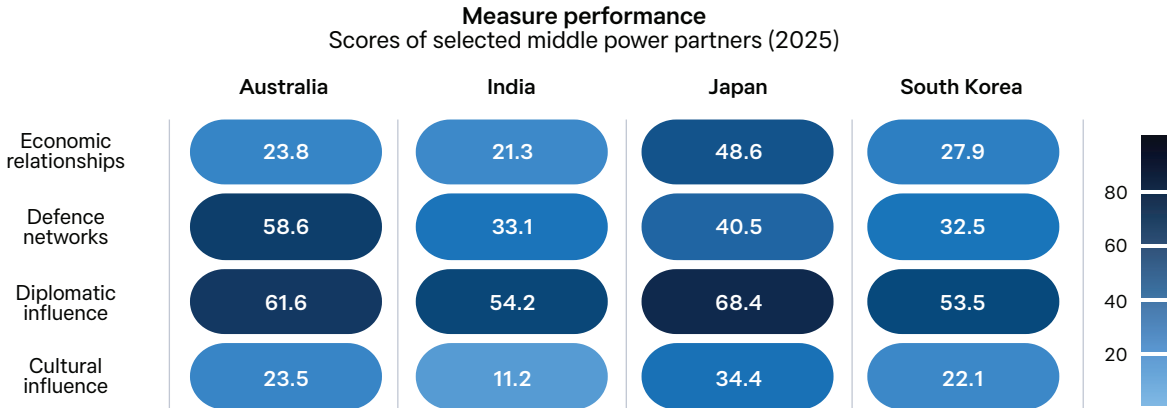


Myanmar, where it has chosen to preserve contact with the post-coup military regime, India ranks as the fifth-most important influence. In Singapore, with which New Delhi has a more mature strategic relationship and close people connections, India ranks eighth, and in Malaysia and Indonesia it ranks ninth. Elsewhere in Southeast Asia, India's overall influence is weaker. While it has a well-developed architecture of engagement through the presence of diplomatic missions, defence agreements, and formalised diplomatic partnerships, its level of activity within these frameworks tends to be lower. One striking area of Indian weakness in engagement with Southeast Asia is people exchanges, where India is close to the bottom-ranked partner for many countries. This suggests that while historical civilisational ties provide a narrative linking India to the region, contemporary reality differs.

Fourth-ranked Australia has strongest influence in Timor-Leste (where it ranks second after Indonesia) and in maritime Southeast Asia, especially the fellow Commonwealth countries of Brunei, Malaysia, and Singapore. In Timor-Leste, Australia is the leading diplomatic partner and aid provider. It also ranks second for information flows, much higher than anywhere else in the region (in Timor-Leste, ABC Radio Australia is available via FM radio, as it is in many Pacific Island countries but not elsewhere in Southeast Asia). Australia's thematic strength is defence networks, where it ranks second after the United States for Southeast Asia as a whole.

South Korea is a critical partner for Vietnam and has a substantial presence in Indonesia and the Philippines. In Vietnam, South Korea's ranking as the third-most important partner is the result of decades of extensive investment by South Korean companies. South Korea is the largest foreign investor, with Samsung alone investing around US\$1 billion a year. This has driven an important trade relationship — South Korea ranks second as a source of imports and third for exports from Vietnam. It has also helped foster extensive people exchanges, with South Korea a leading source of foreign tourists and migrants. However, South Korea does not rank highly as a defence or diplomatic partner, suggesting that it has not sought to leverage its economic and cultural presence for broader strategic ends.

Historically, South Korea's other big investment bets in Southeast Asia have been Indonesia and Myanmar. South Korea is the third-largest investor in Indonesia, with its share growing steadily to account for around 11 per cent of all new project investment over the ten years to 2024. But in Myanmar, the trajectory is downward. In 2017, Myanmar was the third-most important destination for South Korean investment in the region. But the relative importance of this investment dwindled even prior to the 2021 coup. South Korea's cultural influence in the region has grown since 2017, and K-drama and K-pop have seen it rise to third place for film, television, and audio imports into the region. It is also the third-ranked source of tourists for the region.





## 5. Long-distance relationships

**Southeast Asia's next tier of external partners from outside the region — Canada, France, Russia, and the United Kingdom — are peripheral players. Yet when focused tightly on geographic or thematic areas of strength, these countries can exert sharp influence.**

In recent years, many European countries, as well as Canada, have shown greater interest in Southeast Asia, generally as part of Indo-Pacific strategies aimed at broadening their links with the region beyond China in both security and economic spheres. However, the findings of the Southeast Asia Influence Index suggest that, for the most part, these countries are not central players in the region's strategic landscape. In different ways, Russia and the United Kingdom each have sharp focus in their geographic and thematic approaches to Southeast Asia, making them more relevant strategic players than Canada or France, which have emphasised breadth rather than depth in their regional strategies.

Post-Brexit, the United Kingdom has sought to increase its engagement with Southeast Asia as part of a broader outreach to the Indo-Pacific. This is yet to show a big impact in the United Kingdom's level of presence in Southeast Asia, with its ranking for overall influence remaining steady at 13. Still, the United Kingdom has areas of strength. Like Canberra, London's relations are deepest with Commonwealth countries in the region. Driven by defence cooperation and investment ties, the United Kingdom ranks as a top ten partner for Brunei, Malaysia, and Singapore. It is also a leading source of information flows across the region, ranked second behind only the United States as the most important source of international media across news agencies, newspapers, and television channels.

France is a resident power in the wider Indo-Pacific but not in Southeast Asia, ranking as the 15th-most important partner for this region. Compared to the United Kingdom's strengths in information flows, France does not have a clearly defined area of advantage. In practice, its relationship with Singapore serves as an anchor — France is Singapore's

ninth-most consequential partner in overall terms and ranks as its sixth-most influential defence partner, highlighted by President Emmanuel Macron's 2025 visit to Singapore where the two countries signed new agreements on defence cooperation and upgraded relations to a Comprehensive Strategic Partnership. France has also made incremental gains in its defence cooperation with the region since 2017, participating more in regional defence diplomacy activities and becoming a more important partner for Indonesia.

Given Canada's relative size and distance, it is unsurprising that it does not loom large for Southeast Asia. Canada ranks second-last for overall influence, although it rates much higher in the Philippines, where it is ranked as the 12th-most important partner, driven by strong defence cooperation and people exchanges — the latter mostly because of the large Filipino diaspora in Canada. Canada has committed to increase its engagement with the region through its Indo-Pacific strategy, but the findings of the Southeast Asia Influence Index suggest it will need to put serious resources behind this effort if it is to yield results.

In its own way, Russia has also sought to pivot to Asia, an intention declared by President Vladimir Putin as far back as 2012. Moscow's influence in Southeast Asia remains marginal, ranking just 18th out of 21 countries considered in this research, and with a downward trajectory since 2017. However, it would be a mistake to dismiss Russia's relevance. Russia has comprehensive diplomatic and defence networks in the region — for example, it has posted defence attachés to all but two countries and has formalised many defence agreements with the region. Russia also has footholds of influence that allow it to pursue its interests and retain leverage against its adversaries, primarily through arms exports to mainland Southeast Asia but also via defence cooperation with Laos, Myanmar, and Vietnam, and relatively influential information dissemination throughout the region, especially through radio (with Sputnik radio the most searched for foreign radio broadcaster across Southeast Asia). Russia is also seeking additional footholds: over the past year, it has sought deeper defence cooperation with both Indonesia and Malaysia.



## 6. Diversification with dependence

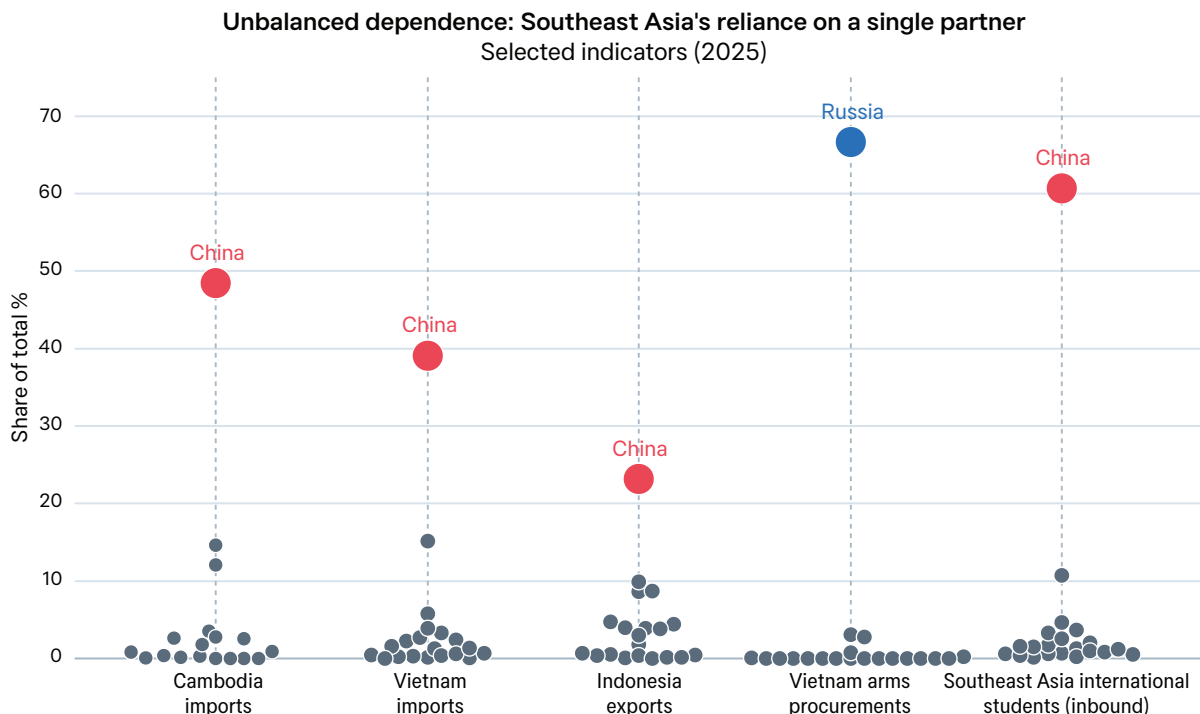
**No Southeast Asian country is within the uncontested sphere of influence of a single external partner, but several countries are highly exposed to China in specific sectors such as tourism, investment, or trade.**

All Southeast Asian countries are diversifying to avoid dependence on any one power and to reduce the risks from growing US–China competition. For most, this strategy is aimed at avoiding over-dependence on China, though in the case of the Philippines, diversification tends to be understood more as avoiding dependence on its ally, the United States.

Data from the Southeast Asia Influence Index suggests that most Southeast Asian countries already have well-diversified foreign policies. For example, five different partners rank first for at least one sub-measure of influence in Brunei, Indonesia, Malaysia, Myanmar, and Vietnam. Even Cambodia and Laos have four countries who each lead on at least one sub-measure

of influence. In this sense, no Southeast Asian country is solely dependent on, or within the uncontested sphere of influence of, another country. While China's influence has grown in war-torn post-coup Myanmar, even the generals in isolated Nay Pyi Taw have other relevant defence partners, led by neighbours India and Thailand, as well as Russia.

Despite this top-level finding, there are pockets of reliance on a single partner, where diversification remains more ambition than reality. For example, in Cambodia, 48 per cent of imports come from China, rising from 41 per cent in 2017, and 44 per cent of foreign investment flows, up from 22 per cent. In Vietnam, 39 per cent of imports are from China, up from 27 per cent in 2017. Overall, China has not become a more important destination for exports from Southeast Asia, remaining steady at around 20 per cent. But exports of commodities to China, especially nickel from Indonesia, have soared. China now accounts for 23 per cent of Indonesia's overall exports, with no other export market coming close.



For Vietnam, 67 per cent of new arms procurements over the past ten years have come from Russia, a reduction from 85 per cent in the ten years to 2017, but still representing a significant degree of reliance. Chinese students make up 60 per cent of all students from outside the region in Southeast Asia; the next-largest group comes from India but makes up less than five per cent of the total.

These findings suggest that only targeted interventions focused on areas of exposure to a single partner will yield real results in terms of diversification. Seeking to bolster diplomatic or economic cooperation in a more generalised way, for example by signing new strategic partnership agreements, is unlikely to meaningfully address Southeast Asian countries' key areas of structural reliance on China.

Expert interviews conducted during the research for this project found little evidence to support the notion that the region may be struggling to manage the politics or the logistics of dealing with too many external partners. Southeast Asian countries are adept at managing numerous and at times competing partners, but are not satisfied with the extent to which these partners are helping to deliver genuinely balanced and diversified relationships.

# Measures of influence



## Economic relationships

Bilateral economic interdependencies between a Southeast Asian country and a partner country, measured in terms of trade relations and investment ties.

Type Measure Weighting 1.5x



## Trade relations

Trade flows between a Southeast Asian country and a partner country.

Type Measure Weighting 1x

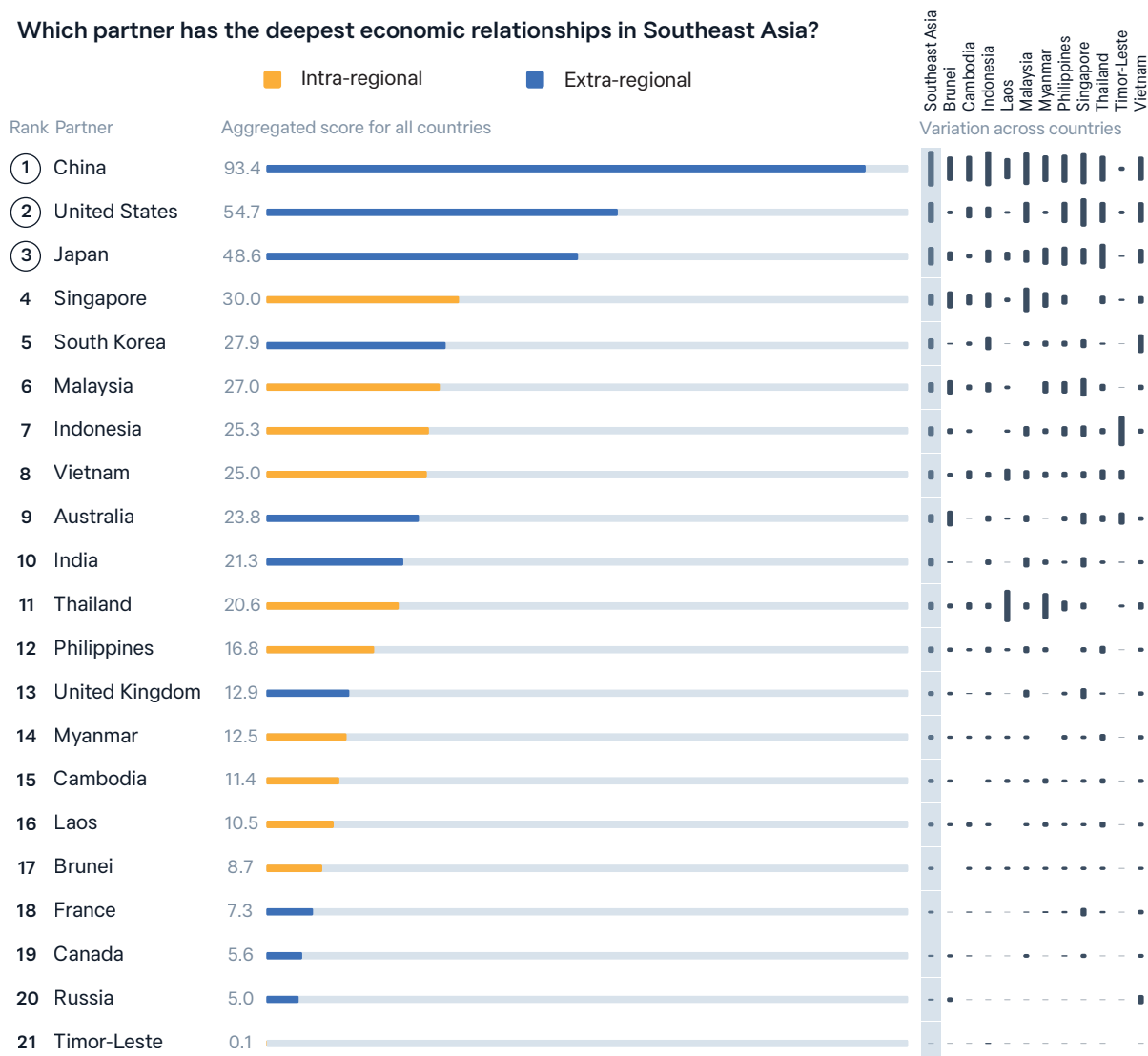


## Investment ties

Foreign direct investment flows between a Southeast Asian country and a partner country.

Type Measure Weighting 1x

### Which partner has the deepest economic relationships in Southeast Asia?



Explore the measures of influence across each Southeast Asian country at [influence.lowyinstitute.org](https://influence.lowyinstitute.org)



Type Measure	Weighting 1x
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Type Measure Weighting 1x



Type Measure	Weighting 1x
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■ Intra-regional
 ■ Extra-regional





## Diplomatic influence

Bilateral diplomatic ties between a Southeast Asian country and a partner country, measured in terms of diplomatic network, development cooperation, and diplomatic engagement.

Type Measure

Weighting 0.5x



## Diplomatic architecture

The network of diplomatic representation linking a Southeast Asian country with a partner country and the level of their diplomatic partnership.

Type Measure

Weighting 1x



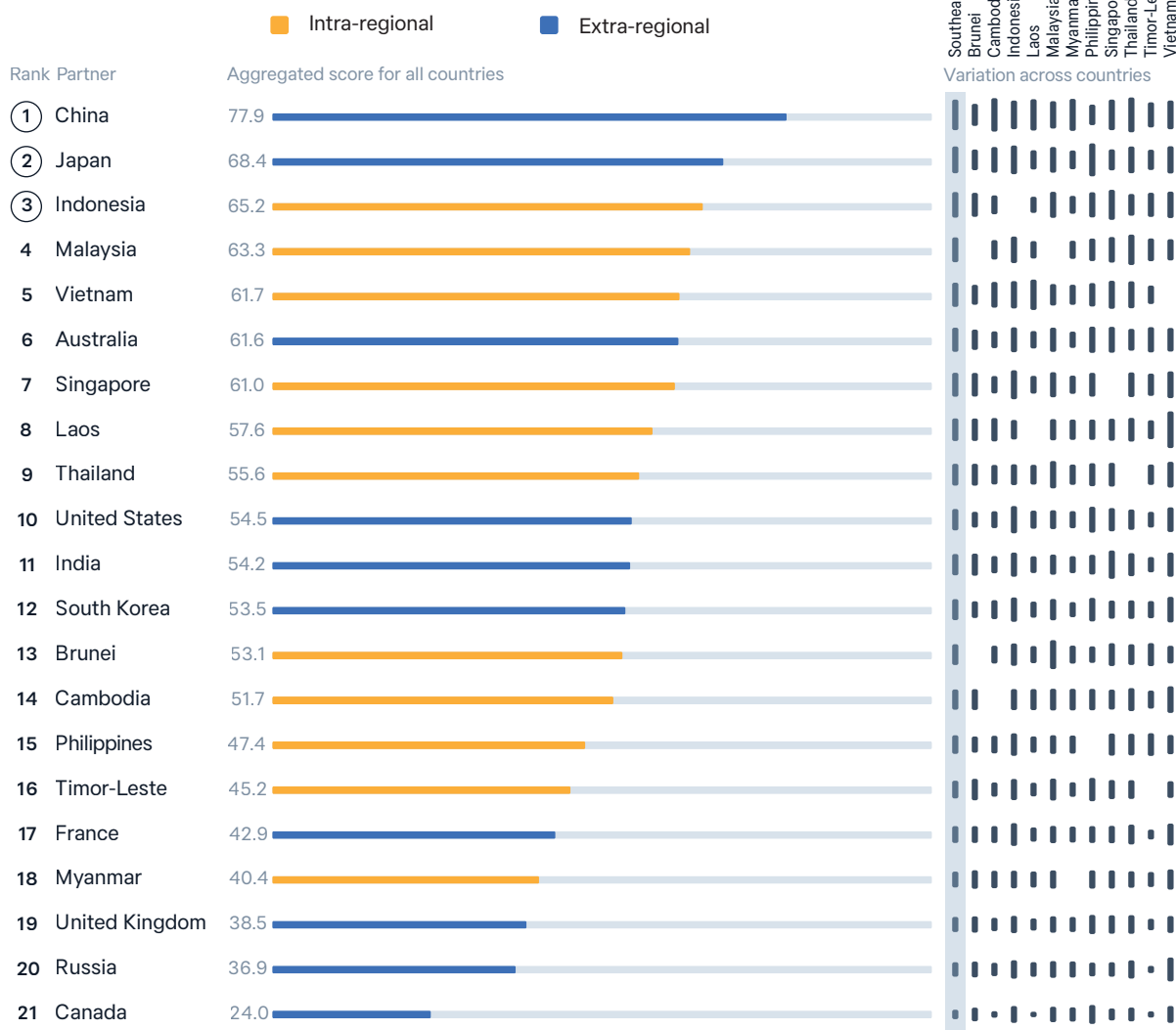
## Diplomatic engagement

The extent of bilateral diplomatic and development cooperation.

Type Measure

Weighting 1x

### Which partner has the most diplomatic influence in Southeast Asia?



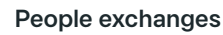
Explore the measures of influence across each Southeast Asian country at [influence.lowyinstitute.org](https://influence.lowyinstitute.org)



Type Measure                      Weighting 1x



Type Measure Weighting 1x



Type Measure      Weighting 1x

■ Intra-regional
 ■ Extra-regional





## Regional engagement

Cooperation between a partner country and ASEAN or other regional institutions, measured in terms of participation in regional groupings and provision of regional development assistance.

Type **Measure**

Weighting **0.25x**



## Regional economic engagement

The participation by a partner country in regional economic initiatives and institutions.

Type **Measure**

Weighting **1x**



## ASEAN engagement

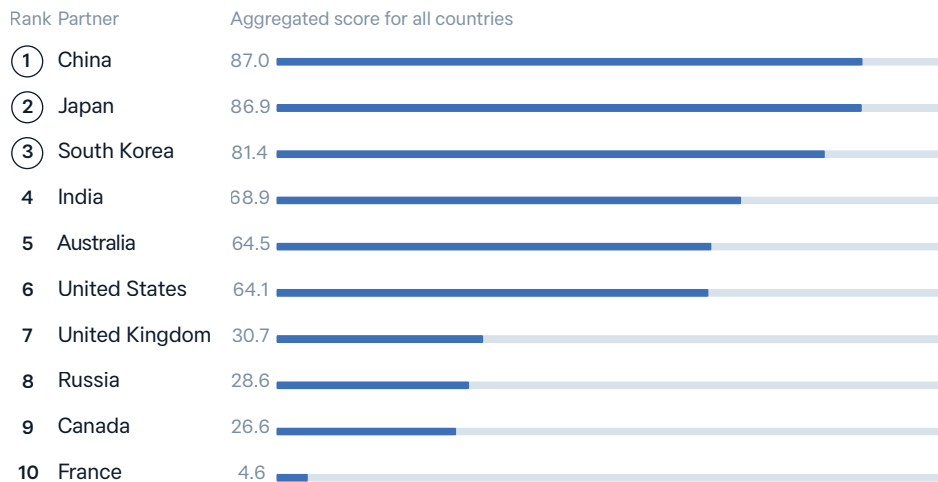
Cooperation of a partner country with ASEAN.

Type **Measure**

Weighting **1x**

### Which partner has the most regional engagement in Southeast Asia?

■ Extra-regional



Explore the measures of influence across each Southeast Asian country at [influence.lowyinstitute.org](https://influence.lowyinstitute.org)

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# Methodology

The Southeast Asia Influence Index comprises five measures of influence, ten thematic sub-measures, and 60 indicators. The project seeks to take stock of activities capable of generating influence between ten external partners and the 11 countries of Southeast Asia, as well as of the relationships between Southeast Asian countries. Bilateral exchanges, dependencies, and societal interactions between countries can drive a convergence of interests or create levers by which one state can pursue its interests and condition the choices of another. These linkages do not, by themselves, cause a country to change its behaviour, but they do function as prerequisites for a government to influence another by non-kinetic means. Their absence indicates with a high degree of certainty that no relationship of influence exists.

The selection of partners to be included within the scope of the study was informed by several factors, including membership of regional multilateral institutions, trade and economic linkages with the region, and consultation with experts to identify those external partners capable of exerting a strategic effect. Many partners that may have relevance in one country or one domain — such as the European Union, Germany, the Gulf Countries, and New Zealand — were not included (inclusion of the European Union would also raise methodological challenges, as it is a unified actor in some domains, such as trade, but not in others, such as defence).

To the extent possible, the project seeks to draw on the established methodology of the Asia Power Index, which the Lowy Institute has published since 2018, and which is recognised as the most comprehensive quantitative assessment of the distribution of power undertaken in any region of the world. Thus, the selection of measures, indicators, data sources, and weightings is all informed by the Asia Power Index. This methodology enables a comparison of the relative weight or influence of external partners across a diverse set of metrics.

The Southeast Asia Influence Index gives primacy to the importance of bilateral relationships between external partners and the countries of Southeast Asia. However, in recognition of the importance of the Association of Southeast Asian Nations (ASEAN), we have included a Regional Engagement measure to reflect each external partner's activity within regional multilateral frameworks. In this conceptualisation, cooperation with ASEAN can enhance each partner's bilateral cooperation with individual Southeast Asian countries.

The project's design and methodology were subject to two external peer reviews and broader consultation with a dozen experts in government, think tanks, and academia across the region. A series of in-depth interviews with experts from across Southeast Asia and the partner countries included in the scope of the study was used to identify key points for analysis and to identify broader trends driving countries' behaviour and priorities.

With the project able to draw on a repository of data gathered by the Lowy Institute since 2017, a comparison between five points in time (2017, 2019, 2021, 2023, and 2025) is available to users. The 2025 edition is based on the most recent full year of data available, which for most indicators (approximately 80 per cent) is 2024. However, in a small number of cases, historical data is unavailable. A full list of identified gaps in the data is available at Appendix 2.



## Measures and weightings

- **Economic relationships:** Bilateral economic interdependencies between a Southeast Asian country and a partner country, measured in terms of trade relations and investment ties
- **Defence networks:** Bilateral defence engagement between a Southeast Asian country and a partner country, measured in terms of defence cooperation activities and arms transfers
- **Diplomatic influence:** Bilateral diplomatic ties between a Southeast Asian country and a partner country, measured in terms of diplomatic networks, development cooperation, and diplomatic engagement
- **Cultural influence:** Cultural connections between a Southeast Asian country and a partner country, measured in terms of media flows and people exchanges
- **Regional engagement:** Cooperation between a partner country and ASEAN, measured in terms of participation in ASEAN-led forums, and provision of multilateral development assistance

These core measures align with the “DIME” acronym used by the US military to identify the principal instruments of national power — diplomatic, information, military, and economic. Recognising the importance of ASEAN in the diplomacy of the region, the project also factors in Regional Engagement as a smaller fifth domain of activity, conceptualising cooperation with ASEAN as a possible boost to the partner’s individual bilateral relationships.

A partner’s overall influence is calculated as a weighted average across the five measures of influence, comprising 60 individual indicators. External partners’ scores for each indicator, sub-measure, measure, and overall influence are normalised on a scale of zero to 100.

Recognising the primacy of economic relationships in Southeast Asia, the project gives heavier weighting to Economic Relationships than to other measures of influence. While Defence Networks and Cultural Influence are weighted equally, Diplomatic Influence is accorded a lower weighting to reflect its status as an enabling rather than a decisive factor in partners’ overall influence. Regional Engagement is conceptualised as providing only a potential modest advantage to external partners’ bilateral engagement with individual countries.

Measure	Weighting
Economic relationships	1.5
Defence networks	1
Diplomatic influence	0.5
Cultural influence	1
Regional engagement	0.25

# Appendices

## Appendix 1: Indicators and sources

ECONOMIC RELATIONSHIPS		
Sub-measure	Indicators	Technical description
Trade relations 50%	Exports	Value of exports from a Southeast Asian country to a partner country; IMF International merchandise trade statistics
	Imports	Value of imports from a partner country to a Southeast Asian country; IMF International merchandise trade statistics
	Free trade agreements	Bilateral or plurilateral free trade agreements concluded between a Southeast Asian country and a partner country; World Trade Organisation Regional Trade Agreements; Lowy Institute
Investment ties 50%	Inbound foreign investment flows	Ten-year cumulative flow of foreign capital investment into a Southeast Asian country from a partner country; fDi Markets
	Jobs created by inbound foreign investment flows	Ten-year cumulative flow of jobs created from investment into a Southeast Asian country from a partner country; fDi Markets
	Outbound foreign investment flows	Ten-year cumulative flows of inward foreign capital investment from a Southeast Asian country into a partner country; fDi Markets

## DEFENCE NETWORKS

Sub-measure	Indicators	Technical description
Defence cooperation 50%	Foreign forces hosted by Southeast Asian country	Presence of military personnel deployed by a partner country to a Southeast Asian country on a permanent or regular rotational basis (minimum of 50 personnel); IISS Military Balance; Lowy Institute
	Foreign forces deployed by Southeast Asian country	Presence of military personnel deployed to a partner country by a Southeast Asian country on a permanent or regular rotational basis (minimum of 50 personnel, excluding United Nations peacekeeping deployments); IISS Military Balance; Lowy Institute
	Combined trainings (bilateral)	Number of bilateral combined training exercises conducted between a Southeast Asian country and a partner country; Lowy Institute
	Combined trainings (plurilateral and multilateral)	Number of plurilateral and multilateral combined training exercises conducted between a Southeast Asian country and a partner country; Lowy Institute
	Combined operation years	Cumulative years in which a Southeast Asian country and partner country have fought alongside in individual conflicts, as a primary or supporting party (excluding United Nations peacekeeping operations); Uppsala Conflict Data Program
	Arms procurements	Arms imports from a partner country into a Southeast Asian country expressed in SIPRI trend indicator values; SIPRI Arms Transfers Register
	Arms exports	Arms exports from a partner country into a Southeast Asian country expressed in SIPRI trend indicator values; SIPRI Arms Transfers Register
Defence diplomacy 50%	Defence attaché network (inbound)	Presence of a resident defence attaché in a Southeast Asian country from a partner country; Lowy Institute
	Defence attaché network (outbound)	Presence of a resident defence attaché from a Southeast Asian country in a partner country; Lowy Institute
	Defence agreements and consultation pacts	Existence of one or more defence cooperation agreements and consultation pacts between a Southeast Asian country and a partner country; Lowy Institute
	Defence dialogue mechanisms	Institutionalised dialogue mechanisms between a Southeast Asian country and a partner country, including policy exchanges and service-level talks; Lowy Institute
	Military alliances	Codified alliance between a Southeast Asian country and a partner country, including a mutual defence clause or actionable security guarantee; Lowy Institute
	Defence dialogues (bilateral)	Number of bilateral defence dialogues held between a Southeast Asian country and a partner country; Lowy Institute
	Defence dialogues (plurilateral and multilateral)	Number of plurilateral and multilateral defence dialogues held between a Southeast Asian country and a partner country; Lowy Institute

DIPLOMATIC INFLUENCE		
Sub-measure	Indicators	Technical description
Diplomatic architecture 50%	Diplomatic network (inbound)	Presence of an embassy or high commission from a partner country in the capital of a Southeast Asian country; Lowy Institute Global Diplomacy Index
	Diplomatic network (outbound)	Presence of an embassy or high commission from a Southeast Asian country in the capital of a partner country; Lowy Institute Global Diplomacy Index
	Sub-national diplomatic network (inbound)	Number of consulates from a partner country in a Southeast Asian country; Lowy Institute Global Diplomacy Index
	Sub-national diplomatic network (outbound)	Number of consulates from a Southeast Asian country in a partner country; Lowy Institute Global Diplomacy Index
	Level of diplomatic partnership	Level of formal diplomatic designation agreed by a Southeast Asian country and a partner country; Lowy Institute
Diplomatic engagement 50%	Voting alignment	Degree of voting alignment between a Southeast Asian country and a partner country in adopted United Nations General Assembly resolutions; United Nations Digital Library
	Diplomatic dialogues (plurilateral and multilateral)	Number of plurilateral and multilateral diplomatic dialogues held involving a Southeast Asian country and a partner country at leader or foreign minister level; Lowy Institute
	Diplomatic dialogues (bilateral)	Number of bilateral diplomatic dialogues held between a Southeast Asian country and a partner country at leader or foreign minister level; Lowy Institute
	High-level visits (outbound)	Number of visits by the leader or foreign minister of a Southeast Asian country to a partner country; Lowy Institute
	High-level visits (inbound)	Number of visits by the leader or foreign minister of a partner country to a Southeast Asian country; Lowy Institute
	Boundary disputes	Overlapping territorial claims and/or unresolved land border and maritime demarcations between a Southeast Asian country and a partner country; Lowy Institute
	Perception of strategic relevance	Perceptions of a Southeast Asian country's elite about the strategic relevance of an extra-regional partner country; ISEAS-Yusof Ishak Institute The State of Southeast Asia
	Foreign assistance (grants)	Annual official development assistance (ODA) and other official flows (OOF), as grants, from a partner country to a Southeast Asian country; Lowy Institute Southeast Asia Aid Map
	Foreign assistance (loans)	Annual official development assistance (ODA) and other official flows (OOF), as loans, from a partner country to a Southeast Asian country; Lowy Institute Southeast Asia Aid Map

CULTURAL INFLUENCE		
Sub-measure	Indicators	Technical description
Information flows 50%	Online search interest	Online interest for a partner country within a Southeast Asian country; Google Trends
	News agencies	Online interest for a partner country's leading news agency within a Southeast Asian country; Google Trends
	Newspapers	Online interest for a partner country's leading newspaper within a Southeast Asian country; Google Trends
	TV broadcasters	Online interest for a partner country's leading television broadcaster within a Southeast Asian country; Google Trends
	Radio broadcasters	Online interest for a partner country's leading radio broadcaster within a Southeast Asian country; Google Trends
	Cultural exports	Exports of creative goods and services from a Southeast Asian country to a partner country; United Nations Conference on Trade and Development
	Cultural imports	Imports of creative goods and services from a partner country to a Southeast Asian country; United Nations Conference on Trade and Development
	International students (outbound)	Students from a Southeast Asian country enrolled in tertiary education in a partner country
	International students (inbound)	Students from a partner country enrolled in tertiary education in a Southeast Asian country
	Overseas university branches	Branches of a partner country's universities based in a Southeast Asian country (offering degree qualifications accredited by the partner country); Lowy Institute
People exchanges 50%	Migration (inbound)	Size of the immigrant population from a partner country in a Southeast Asian country; United Nations Population Division - International Migrant Stock
	Migration (outbound)	Size of the immigrant population from a Southeast Asian country in a partner country; United Nations Population Division - International Migrant Stock
	Tourism (outbound)	Arrivals of non-resident visitors from a Southeast Asian country at the national border of a partner country
	Tourism (inbound)	Arrivals of non-resident visitors from a partner country at the national border of a Southeast Asian country
	Flight routes	Existence of a direct international flight route between a Southeast Asian country and a partner country; FlightsFrom.com
	Visa-free travel (outbound)	Visa-free travel for citizens of a Southeast Asian country when entering a partner country; Henley Passport Index
	Visa-free travel (inbound)	Visa-free travel for citizens of a partner country when entering a Southeast Asian country; Henley Passport Index
	Film, television and audio exports	Exports of creative goods and services related to audiovisual, multimedia and photography from a partner country to a Southeast Asian country; United Nations Conference on Trade and Development
	Film, television and audio imports	Imports of creative goods and services related to audiovisual, multimedia and photography from a partner country to a Southeast Asian country; United Nations Conference on Trade and Development

REGIONAL ENGAGEMENT		
Sub-measure	Indicators	Technical description
<b>Regional economic engagement</b> 50%	Multilateral development bank contributions	The subscribed capital of a partner country in major multilateral development banks active in Southeast Asia; World Trade Organisation Regional Trade Agreements; Lowy Institute
	Regional foreign assistance (grants)	Annual official development assistance (ODA) and other official flows (OOF), as grants, given by a partner country to regional organisations or programs; Lowy Institute Southeast Asia Aid Map
	Regional foreign assistance (loans)	Annual official development assistance (ODA) and other official flows (OOF), as loans, given by a partner country to regional organisations or programs; Lowy Institute Southeast Asia Aid Map
	Free trade agreements (regional)	Multilateral free trade agreements concluded between a partner country and all Southeast Asian countries; World Trade Organisation Regional Trade Agreements; Lowy Institute
<b>ASEAN engagement</b> 50%	Level of partnership with ASEAN	Formal diplomatic designation agreed between a partner country and ASEAN; Lowy Institute
	Regional organisation membership	Participation of a partner country in select ASEAN-centred regional organisations and meetings; Lowy Institute
	Permanent representatives to ASEAN	The presence of a standalone permanent mission to the Association of Southeast Asian Nations from a partner country; Lowy Institute Global Diplomacy Index

## Appendix 2: List of data gaps

While the Southeast Asia Influence Index enables a review of trends across five points in time between 2017 and 2025, in some cases, we were unable to capture all data points for every year. For transparency, we list here several identified gaps in data.

### Diplomatic influence

- Diplomatic dialogues (bilateral, plurilateral, and multilateral): data was not collected for 2019, so 2017 was used as a proxy to identify likely levels of dialogue between countries.
- Perception of strategic relevance: this indicator draws on findings of the ISEAS State of Southeast Asia survey, which has only published responses to this question since 2024. As the survey did not ask about France, we used responses on the European Union as a proxy, which may overestimate France's score for this indicator.

### Cultural influence

- Flight routes: data is only available from 2019 onwards.
- Visa-free travel: data is only available from 2023 onwards.
- Due to gaps and inconsistencies in data from UNESCO, international student data relies on estimating numbers based on historical regional breakdowns and multiple data sources. Note also that Singapore does not publish a breakdown by nationality of inbound international students.
- Information flows: all five indicators in this sub-measure — online search interest, news agencies, newspapers, TV broadcasters, and radio broadcasters — use Google trends data, a methodology replicated from the Asia Power Index. However, smaller sample sizes from small countries such as Laos and Timor-Leste means the data may not be fully reflective of information flows in these countries.

### World share

- For indicators where full data is available, the project identifies the share of world total represented by each partner's engagement with Southeast Asia (for example, we indicate that France's share of defence exports to Indonesia represents 19 per cent of the total of partners included in this study, but only 12 per cent of the total of all global arms procurement partners). However, for many indicators, the world total is unknown (for example, the total number of diplomatic dialogues held between Southeast Asian countries and all global partners), meaning that in many cases we cannot include this figure.

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## About the authors



**Susannah Patton** is Deputy Research Director at the Lowy Institute. She is also the Director of the Institute's Southeast Asia Program and responsible for the Asia Power Index, the Institute's annual data-driven assessment that maps the changing distribution of power in the region. Susannah joined the Institute in 2022 and her research has focused on geopolitical trends in Southeast Asia and Australian foreign policy.



**Jack Sato** is a data analyst for the Asia Power Index at the Lowy Institute. He joined the Institute in 2022. He holds a degree in Science/Arts, majoring in Statistics, Chinese, and Japanese (minoring in International Relations) from the University of Queensland.



**Rahman Yaacob** was a Research Fellow in the Southeast Asia Program at the Lowy Institute. His research interests include Southeast Asia's defence and security issues and the region's relations with major powers. Before joining the Lowy Institute, Rahman completed a PhD at the National Security College, Australian National University. His dissertation examined Singapore's defence policy and analysed the broader strategic and security issues relating to ASEAN during the Cold War. He previously served nearly 18 years with the Government of Singapore, holding various command and staff postings in security-related areas.





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