

AUDIT OF GEOPOLITICAL CAPABILITY

AN ASSESSMENT OF TWENTY MAJOR POWERS

COMPILED BY JAMES ROGERS

2019



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**GLOBAL
BRITAIN
PROGRAMME**

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Executive Summary

- Since the “Great Recession” in the late 2000s it has been claimed that a number of emerging economies – particularly the so-called “BRICS” (Brazil, Russia, India, China and South Africa) – are rapidly closing the gap in national power with the Western democracies. This trend has recently merged with the political situation in the West – not least the United States (US), United Kingdom (UK) and European Union (EU) – giving rise to a plethora of “declinist” narratives.
- Building on the “Audit of Geopolitical Capability” from September 2017, this study provides an assessment of the geopolitical capabilities of twenty major countries, drawn from the Group of Twenty (G20), with the addition of Nigeria. As more countries have been added, the original framework and methodology have had to be refined. Thus, this updated Audit reorders “geopolitical capability” – the ability to overcome the “tyranny of distance” and influence physical space, including counterparts located within that space – into a framework with four central attributes: “National Base”, “National Structure”, “National Instruments” and “National Resolve”.
- The Audit of Geopolitical Capability (2019) reveals that, aside from China, the major Western democracies – not least the UK and US, as well as France, Germany and Japan – still hold a substantial lead over their emerging competitors.
- These results still closely reflect those of the 2017 iteration of the Audit, although China has leap-frogged France to become the world’s third strongest power.
- As with the 2017 Audit, the US remains by some margin the world’s only superpower: it maintains the largest national base, the most extensive national structure, and has access to overwhelming national instruments, not least awe-inspiring military might.
- Likewise, as in 2017, the Audit shows once again that the UK – though far behind the US – still enjoys a lead over China (albeit less than in 2017), despite having access to a far smaller national base. Indeed, in 2019, the UK remains second only to the US in terms of overall geopolitical capability, with a particularly strong performance in relation to diplomatic leverage and national resolve.
- Other Western powers – France, Germany, Japan, Canada and Australia – score prominently, as the world’s fourth, fifth, sixth, seventh and eighth geopolitically most-capable countries, respectively.
- India – the world’s ninth leading power – has greater geopolitical capability than Russia, which in turn is only marginally ahead of industrious South Korea.
- With the exception of China, the other “BRICS” nations – the “BRIS” – rank among the bottom half of the major powers, suggesting that “declinist” narratives in the West are rather inflated.

“Building on the foundations of its 2017 assessment of the geopolitical capabilities of eight leading powers, the Henry Jackson Society has now created a multi-faceted model covering no fewer than twenty. It is no easy task to consolidate and compare so many factors (some of them, inevitably, subjective) by applying a complex mathematical formula. In compiling and presenting his findings, James Rogers rightly warns against using them as a predictive tool – rather they illustrate the overall *potential* of nations on the world stage, which may or may not successfully be made actual. As such, his results are a valuable device for making comparisons and identifying trends.”

Rt. Hon. Julian Lewis MP

Chair of the Parliamentary Defence Committee

“We’re constantly told that the United Kingdom is a nation in decline. This *Audit of Geopolitical Capability* shows that we still perform robustly in relation to our counterparts. Very few nations can bring together national capabilities – economy, diplomacy, military, culture – in the way that we do. We just need to work out how to mobilise these capabilities to remain among the world’s leading nations in the twenty-first century.”

Ian Austin MP

Member of the Parliamentary Foreign Affairs Committee

“This *Audit of Geopolitical Capability* is a fascinating account of the capabilities of the major powers. It shows that the United Kingdom is well-positioned to confront many of the problems we may face – and is an important read for any politician, civil servant or military officer. It shows where the United Kingdom has particular strengths, as well as weaknesses. If we cultivate our strengths and work on overcoming those weaknesses, there is no reason we cannot remain among the world’s most powerful countries.”

Bob Seely MP

Member of the Parliamentary Foreign Affairs Committee

“James Roger’s *Audit of Geopolitical Capability* of twenty major powers in the world comes as a timely and essential tool for a Global Britain that is finding its way, particularly post Brexit.”

Royston Smith MP

Member of the Parliamentary Foreign Affairs Committee

Contents

Foreword	9
Introduction: Why an audit of geopolitical capability is needed	10
Structure	11
1. Measuring the capability of the major powers	12
1.1 The Audit of Geopolitical Capability (2017) revisited	14
2. Enlarging the focus: Including more countries	15
2.1 The G20 in a nutshell	15
2.2 Why the G20?.....	15
2.3 Replacement of the European Union with Nigeria	16
3. Refining the assessment framework	17
3.1 Indicators.....	18
3.1.1 National Base (Equivalent to 20% of the total)	18
3.1.2 National Structure (Equivalent to 40% of the total).....	19
3.1.3 National Instruments (Equivalent to 30% of the total)	22
3.1.4 National Resolve (Equivalent to 10% of the total)	24
3.2 Composite score.....	24
4. Methodology	25
4.1 Data	25
4.1.1 Data availability	25
4.1.2 Data quality and format.....	25
4.2 Formula for computing each major power’s geopolitical capability	26
5. Classifying the major powers	29
5.1 Average scores for the major powers	30
5.1.1 National Base.....	31
5.1.2 National Structure	31
a. Economic Clout.....	32
b. Technological Prowess	33
c. Cultural Prestige.....	33
5.1.3 National Instruments	34
a. Diplomatic Leverage	35
b. Military Might	36
5.1.4 National Resolve	37
5.2 Profiles for six selected major powers	38
5.2.1 United States	38
5.2.2 United Kingdom	38
5.2.3 China.....	39
5.2.4 Japan.....	39
5.2.5 India.....	40
5.2.6 South Korea	40

6. Profiles for the European powers.....	41
6.1 United Kingdom.....	41
6.2 France.....	42
6.3 Germany.....	42
6.4 Russia.....	43
6.5 Italy.....	43
6.6 Turkey.....	44
Conclusion.....	45
Appendix.....	47
A. Comparison of different capability and power indices.....	47
A.1 The Composite Index of National Capability compared to the Audit of Geopolitical Capability.....	47
A.2 The Global Presence Index compared to the Audit of Geopolitical Capability.....	47
A.3 The Soft Power Index compared to the Audit of Geopolitical Capability.....	48
B. Attributes, pillars, indicators and components.....	48
C. Table of indicators by weight.....	51
D. Statement on Overseas Territories.....	52
E. Omissions of data.....	56
F. Data Tables.....	58
F.1 Geopolitical capability of the major powers (scores).....	58
F.2 Geopolitical capability of the major powers (relative scores).....	59

The realm of international politics is like a field of forces comparable to a magnetic field. At any given moment, there are certain large powers which operate in that field as poles. A shift in the relative strength of the poles or the emergence of new poles will change the field and shift the lines of force. A reorientation and realignment of the small powers in such a field may be the first result of a shift in the balance of forces between the large powers.

Prof. Nicholas Spykman, July 1939¹

¹ Spykman, N., 'Geographic Objectives in Foreign Policy, I', *The American Political Science Review*, 33:3 (1939), p.395.

Foreword

Geography, capabilities and a country's willingness to use power shape our international relations and politics. This is not a new insight, but it is something which is becoming increasingly more significant again. We have come to think that rules-based institutions and the interdependence of global economic activity creates stability and certainty. But this is not so. The picture is more complicated and we need to understand how the various components interact.

This 2019 Audit of Geopolitical Capability undertaken by the Henry Jackson Society builds on work started in 2017. Then we looked at 8 major countries and ranked them by considering seven indicators. This report is more ambitious. It looks at the countries of the Group of 20 with the addition of Nigeria, Africa's most populous country and largest economy. Ranking is based on four key indicator blocks. National base, national structures, national instruments and national resolve. This has allowed for a more granular analysis of each major power's assets and willingness to utilise its capabilities.

Some countries have vast populations or natural resources, or highly competitive innovation based economies. Others coerce or attack their neighbours out of geopolitical considerations or domestic power politics. There is also an increased willingness to disregard what were thought to be long established conventions, even by countries like the United States. Some leaders may even best be described as wanting to achieve change by being disruptive.

Much of the post-Second World War settlements and the institutions which emerged from it are being challenged and are coming under strain. From NATO to the "BRICS" countries, the dynamics and challenges of this new world require us to understand how geopolitical capabilities are shaped.

Since the last survey China has leapfrogged France in the ranking, and it has done so at the same time as its leadership has reaffirmed its commitment to being a one-party state. Not yet a superpower alongside America, China's trajectory is nevertheless clear, assuming growth is sustainable. Russia on the other hand, for all its military capability, languishes behind Canada and India.

This is an international survey, but it has particular significance for the United Kingdom. As we leave the European Union and seek to be an even more outward-looking global player, able to shape the world we live in, this survey of geopolitical capacity is an essential guide.

- Rt. Hon. Gisela Stuart

Introduction: Why an audit of geopolitical capability is needed

The strategic consequences of the “Great Recession” that struck the West during the late 2000s show no sign of abating. The age of Western industrial and economic ascendancy, starting with Portuguese, Spanish and English oceanic expeditions, appears to be coming to a startling end. In 1999, China’s economy was just two-thirds the size of the Britain’s; today, it is over four times larger, and is even set to overtake the United States (US).² Likewise, India’s economy was nearly four times smaller than Britain’s twenty years ago; today, it is almost the same size.³ Indeed, according to the long-term economic projections by Goldman Sachs and PriceWaterhouseCoopers, the gulf between the West and the rest of the world, especially the so-called “BRICS” - Brazil, Russia, India, China and South Africa - will become wider still.⁴ By the early 2030s, countries such as China and India may have larger national outputs than all the major Western European countries put together.⁵

Initially, the West hoped that as the new emerging economies grew in size and strength, their governments would gradually become “responsible stakeholders” in the pre-existing rules-based international system. Unfortunately, this has not been the case. While some powers sought to join the West, others have indulged even in revisionist or irredentist geopolitics – a word that had all but gone out of fashion by the early 2000s.⁶ As Gavin Williamson, the Secretary of State for Defence, told the House of Commons in June 2018:

We are in a period of constant aggressive competition between states, often developing into undeclared confrontation and, in some cases, proxy conflicts... Our adversaries are working to take advantage of this contested environment by systematically identifying and exploiting our vulnerabilities and those of our allies and partners. Peer and near-peer states are investing heavily in both conventional and emerging technologies, and are increasingly adopting hybrid or asymmetric approaches to gain advantage... All this means that the challenges to our national security and prosperity – and to our allies’ and partners’ security and prosperity – are increasingly complex, ambiguous, destabilising and potentially catastrophic.⁷

Indeed, from Russia’s seizure of Crimea in 2014 to China’s gradual but unrelenting “continentalisation” of the South China Sea over the past five years, it is progressively clear that the established rules-based system has come under mounting strain and, increasingly, sustained assault.⁸

² See ‘GNI, Atlas method (total US\$)’, *World Bank*, 2017, available at: <https://data.worldbank.org/indicator/NY.GNP.ATLS.CD?locations=GB-RU-CN>, last visited: 3 December 2018.

³ Ibid.

⁴ The term ‘BRICS’ was first coined by Jim O’Neill, the former Chief Executive Officer of Goldman Sachs, in his 2001 report on global investment. See: O’Neill, J., ‘Building Better Global Economic BRICs’, *Goldman Sachs*, November 2001, available at: <https://www.goldmansachs.com/insights/archive/building-better.html>, last visited: 30 November 2018.

⁵ ‘Global Economics Analyst: Landing the Plane’, *Goldman Sachs*, 14 November 2018, available at: <https://www.goldmansachs.com/insights/pages/outlook-2019/global-outlook/report.pdf>, last visited: 3 December 2018, and ‘The World in 2050’, *PwC*, February 2017, available at: <https://www.pwc.com/gx/en/issues/economy/the-world-in-2050.html>, last visited: 3 December 2018.

⁶ For a good example of this kind of thinking, see: Leonard, M., *Why Europe will run the 21st Century* (London: Fourth Estate, 2005) and Fettweis, C., ‘Revisiting Mackinder and Angell: The Obsolescence of Great Power Geopolitics’, *Comparative Strategy*, 22:2 (2003).

⁷ Williamson, G., ‘Modernising Defence Programme – Update: Written Statement – HCWS883’, *Parliament.uk*, 19 July 2018, available at: <https://www.parliament.uk/business/publications/written-questions-answers-statements/written-statement/Commons/2018-07-19/HCWS883/>, last visited: 3 December 2018.

⁸ Andrew Lambert describes “continentalisation” as the attempt made by continental powers – such as China – to generate overlapping land-based military infrastructure to wrest control over adjacent maritime spaces, such as the South and East China seas. See: Lambert, A., *Seapower States: Maritime Culture, Continental Empires and the Conflict that Made the Modern World* (New Haven, Connecticut, 2018), p.318.

This new offensive has caught the Western powers – the custodians of the rules-based order – by surprise. Imagining a more peaceful and prosperous world in the aftermath of the Cold War, the Western countries disarmed themselves and turned increasingly inward.⁹ Worse, the political flux that began during 2016 in both the UK and US has accelerated the rise of “neo-declinst” discourses in both countries.¹⁰ In particular, the British withdrawal from the European Union (EU) and the election of Donald Trump as US president have been accompanied by frenzied claims that the two pioneers of the rules-based system have begun to abrogate their global responsibilities.¹¹ Meanwhile, a poisonous brew of illiberal ideologies, protest movements and unresponsive government has taken hold of several continental European nations, while the EU has never looked so disconnected, brittle and ineffective.¹²

Consequently, with the emergence of new economic actors and the accompanied resurgence of geopolitics, it has become necessary to ascertain the capabilities available to each major power. This was a driving factor behind the development of the Henry Jackson Society’s first “Audit of Geopolitical Capability” in September 2017, which included eight major powers. However, if a more extensive transformation in the global balance of power is now taking place, including the rise of more than the so-called “BRICS”, it becomes necessary to assess the capabilities of a wider set of countries. In turn, this mandates a review of the Audit’s analytical framework, as well as its wider methodology.

Structure

This report assesses and highlights the geopolitical capability – the ability to overcome the “tyranny of distance” and influence physical space, including counterparts located within that space – of twenty leading countries, drawn primarily from the Group of Twenty (G20). As such, it also explains the reasoning, organisation and methodology behind the updated and refined Audit.

Aside from this introduction and the appendixes at the end, this report contains seven key sections. Section 1 reviews and critiques “established” methods for assessing the geopolitical capability of the major powers. Sections 2, 3 and 4 refine the scope of the Audit by enlarging its focus, redefining its framework and outlining a new methodology. Using the new framework and methodology, Section 5 then classifies each of the major powers, before reviewing their relative performance and position. Insofar as European geopolitics has also risen in prominence, particularly since the UK preparations to withdraw from the EU, Section 6 compares and contrasts the six main European powers – France, Germany, Italy, Russia, Turkey and the UK – while the final section offers a number of conclusions.

⁹ Cooper, R., ‘The long peace’, *Prospect*, 20 April 1999, available at: <https://www.prospectmagazine.co.uk/magazine/thelongpeace>, last visited: 30 November 2018.

¹⁰ See, for example: Wyne, A., ‘Is America in decline?’, *The New Republic*, 21 June 2018, available at: <https://newrepublic.com/article/149008/america-choosing-decline>, last visited: 30 November 2018 and Tombs, R., ‘The myth of Britain’s decline’, *The Spectator*, 8 July 2017, available at: <https://www.spectator.co.uk/2017/07/the-myth-of-britains-decline/>, last visited: 3 December 2018.

¹¹ For an example, see: Allen, N. and Rory Mulholland, ‘Angela Merkel says Europe can no longer rely on US or UK – and must “fight for its own destiny”’, *Daily Telegraph*, 28 May 2017, available at: <https://www.telegraph.co.uk/news/2017/05/28/angela-merkel-says-europe-can-no-longer-rely-us-uk-must-fight/>, last visited: 20 November 2018.

¹² Thompson, H., ‘Broken Europe: Why the EU Is Stuck in Perpetual Crisis’, *Foreign Affairs*, 10 December 2018, available at: <https://www.foreignaffairs.com/articles/europe/2018-12-10/broken-europe>, last visited: 11 December 2018 and Simms, B., ‘The world after Brexit: The crucial variable is not British power but the weakness of Europe’, *The New Statesman*, 1 March 2017, available at: <https://www.newstatesman.com/world/europe/2017/03/world-after-brexite>, last visited: 30 November 2018. See also: Rogers, J., ‘Defending Europe: Global Britain and the future of European Geopolitics’, *The Henry Jackson Society*, 29 May 2018, available at: <https://henryjacksonsociety.org/publications/defending-europe-global-britain-and-the-future-of-european-geopolitics/>, last visited: 30 November 2018.

1. Measuring the capability of the major powers

The relative strength of the leading powers in the geopolitical system has long preoccupied strategic analysts.¹³ It was not, however, until the nineteenth century that an attempt was made to systematically explain the differences in national power. Although Lord Castlereagh, the British Foreign Secretary, was the first to refer to the “great powers”, it was Leopold von Ranke, the German historian, who first attempted to explain how some countries were different to others in terms of capability.¹⁴ Von Ranke argued that a country could claim to be a “great power” only if it could “maintain itself against all others, even when they are united”.¹⁵ Being able to defend itself against all-comers was certainly an extreme test of “great power” status, but not unfair given the context of the time. Indeed, the period of geopolitical struggle during the late nineteenth and early twentieth centuries was extreme. France failed von Ranke’s test in 1871. Austria-Hungary, Tsarist Russia and the Ottoman Empire were all dissolved during the First World War. Germany and Japan were crushed by the end of the Second World War. In 1945, only three powers appeared to meet von Ranke’s criteria: the Soviet Union, the UK and the US.

Already, by 1944, William Fox, the Associate Director of the Yale Institute of International Studies, realised that a new term was needed for such countries – “super-powers”.¹⁶ The acquisition of atomic weapons by the US in 1945, followed by the Soviet Union (1949) and the UK (1952), only appeared to compound their position.¹⁷ However, as the yields of nuclear weapons grew ever larger, strategic analysts came to imagine that only large continental states would be able to defend themselves and their interests in the event of a superpower war, meaning that smaller nuclear powers like the UK would slip into a second tier.¹⁸

In no small way, this perception seems to have given impetus to one of the first “scientific” attempts to study national capability, by the Correlates of War Project at the University of Michigan in the early 1960s.¹⁹ This resulted in the “Composite Index of National Capability”, comprised of six key indicators – Population (PO), Urban Population (UP), Iron and Steel Production (ISP), Primary Energy Production (PEP), Military Expenditure (ME) and Military Personnel (MP) – that ascertain each country’s power, expressed using the following formula:

$$\text{Power} = \frac{PO + UP + ISP + PEP + ME + MP}{6}$$

Despite its theoretical elegance, it remains an open question as to whether this system manages to accurately “capture” the capability of nations (see Appendix A). First, the Composite Index of National Capability focuses on the foundations of national capability and tends to ignore national structures, thus prioritising the latent capability of large continental states to the detriment of smaller, nimbler powers (for example, the latest Composite Index of National Capability ranks China as the world’s leading power – see Appendix A). Second, it conflates power with capability: it includes neither political will nor national strategy, which

¹³ Much of this section draws off Rogers, J., *An Audit of Geopolitical Capability: A Comparison of Eight Major Powers* (London: The Henry Jackson Society, 2017), pp.9-11.

¹⁴ Lord Castlereagh, a former British Foreign Secretary, is widely credited with having first used the term “great Power” in diplomatic correspondence in 1814. See: Webster, C. (ed.), *British Diplomacy 1813-1815: Selected Documents Dealing with the Reconciliation of Europe* (London: G. Bell and Sons Ltd., 1921), p.307.

¹⁵ Cited in: Von Laue, T. H., *Leopold von Ranke: The Formative Years* (Princeton: Princeton University Press, 1950), p.203.

¹⁶ Fox, W. T. R., *The Super-Powers: The United States, Britain, and the Soviet Union – Their Responsibility for Peace* (New York City: Harcourt Brace and Company, Inc., 1944).

¹⁷ Rogers, *Defending Europe*, May 2018.

¹⁸ Baylis, J., *British Defence Policy: Striking The Right Balance* (New York: Palgrave Macmillan, 1989).

¹⁹ Singer, J. D., Stuart Bremer and John Stuckey, ‘Capability Distribution, Uncertainty, and Major Power War, 1820-1965’, in Russett, B. (ed.), *Peace, War, and Numbers* (Beverly Hills, California: Sage, 1972).

are always required to convert capability into power. Third, albeit less significantly, it fails to accept that manpower is not a particularly useful indicator of military capability (or power). Without access to overseas military bases, warships, logistics vessels and transport aircraft, and so on, it would be hard to move military personnel beyond their respective homelands, rendering them all but useless except for national defence.

Moreover, it became clearer during the 1970s that a new generation of nuclear delivery systems might reduce the initial advantages afforded to the American and Soviet superpowers. The advent of submarine-launched ballistic missiles with intercontinental range, armed with multiple independent re-entry vehicles (MIRVs), gave their holders the ability to inflict near-certain nuclear destruction on any potential enemy. In the words of Kenneth Waltz, then Ford Professor of Political Science at the University of California, Berkeley:

the question is not whether one country has more [warheads] than another but whether it has the capability of inflicting ‘unacceptable damage’ on another, with unacceptable damage sensibly defined. Once that capability is assured, additional strategic weapons are useless. More is not better if less is enough.²⁰

Accordingly, with guaranteed “second-strike” systems, smaller nuclear powers – such as the UK and France – gained a strategic capability (the ability to deter) that reduced the superpowers’ early advantage in terms of geographic depth and strategic mass.²¹ Consequently, by the 1970s (if not before) technological changes gave fresh impetus to Bernard Brodie, Associate Professor of International Relations at Yale University, who asserted in 1946 that: “Thus far the chief purpose of our military establishment has been to win wars. From now on its chief purpose must be to avert them. It can have almost no other useful purpose.”²²

However, while the *Pax Atomica* rendered “vertical” escalation – and thus, major war – increasingly perilous, it did not prevent (indeed, it may have even facilitated) “horizontal” escalation. Under nuclear conditions, the major powers simply found new ways to compete for influence. Rather than moving from a period of “peace” to a phase of “war”, confrontation grew “colder”, waged through a plethora of proxy conflicts and with an array of instruments deliberately designed to get underneath the escalatory ladder. Indeed, in the words of General Sir Nicholas Carter, Chief of the Defence Staff:

States have become masters at exploiting the seams between peace and war. What constitutes a weapon in this grey area no longer has to go ‘bang’. Energy, cash – as bribes – corrupt business practices, cyber-attacks, assassination, fake news, propaganda and indeed military intimidation are all examples of the weapons used to gain advantage in this era of ‘constant competition’... The deduction we should draw from this is that there is no longer two clear and distinct states of ‘peace’ and ‘war’; we now have several forms.²³

Although deployed to describe the character of recent conflicts, this description also defines (bar references to cyber-attacks) the Cold War between the West and the Soviet Union. After all, no conflict between the major powers is likely to escalate into a conventional confrontation under nuclear conditions. If this be the case, the strategic environment envisaged for geopolitical competition should not be conventional war, but a wider, more pervasive confrontation – a “cold war” – in which a far broader array of national capabilities will come into play.

²⁰ Waltz, K., *The Spread of Nuclear Weapons: More May Be Better*, *Adelphi Papers*, 21:171 (1981).

²¹ Baylis, J., *British Defence Policy: Striking the Right Balance* (New York City: St. Martin’s Press, 1989), p.122.

²² Brodie, B., *The Absolute Weapon: Atomic Power and the World Order* (New York City: Harcourt, Brace and Co., 1946), p.76.

²³ Carter, N., ‘Dynamic Security Threats and the British Army’, *Royal United Services Institute*, 22 January 2018, <https://rusi.org/event/dynamic-security-threats-and-british-army>, last visited: 30 November 2018.

1.1 The Audit of Geopolitical Capability (2017) revisited

Attempts to assess the overall capability available to each of the major powers have evolved since the development of the Composite Index of National Capability. Two notable systems have been developed over the past decade, based on a range of different indicators. The Madrid-based think tank Elcano Royal Institute's annual "Global Presence Index" is one such example, while the London-based political consultancy and public relations agency Portland's annual "Soft Power Index" is another (see Appendix A).²⁴ The former aims to measure each country's "global presence", while the latter seeks to assess the so-called "soft power" (i.e. the ability to attract) of thirty different countries.²⁵ Both have a number of limitations,²⁶ particularly given that they are not designed to assess the major powers' ability to engage in geopolitical competition with one another.

After all, Russia's dismemberment of Ukraine and China's "continentalisation" of the South China Sea shows that geopolitics has not subsided. It no longer makes sense to ignore either geographic space nor the projection and/or institutionalisation of coercive power, especially given the rise of so-called "hybrid" or "non-linear" warfare.²⁷

It was the continued "primacy of geopolitics" – particularly the blurring of the traditional states of "peace" and "war" – combined with a broader understanding of national capability, that sparked the development of the Audit of Geopolitical Capability by the Henry Jackson Society in 2017. This attempted to assess the relative "geopolitical capability" – the ability of countries to overcome the "tyranny of distance" and influence physical space, including counterparts located within that space – of the five permanent members of the United Nations Security Council, alongside three other important countries: Germany, India and Japan.²⁸ It therefore divided geopolitical capability into seven different conceptual "baskets" – "Geographic Integration", "Demographic Condition", "Economic Clout", "Technological Prowess", "Diplomatic Leverage", "Military Strength" and "Cultural Prestige" – in order to measure the major powers' overall geopolitical potential. These seven baskets each included five indicators, themselves comprised of over fifty different components.

Importantly, as a gauge of capability and not power, the Audit assessed *only* the potential assets (i.e. capabilities) available to each country: it did not aim to evaluate the resulting power, which can only be realised through national resolve and effective national strategy.

²⁴ For the Global Presence Index, see: 'Elcano Global Presence Index', *Elcano Royal Institute*, 2018, available at: <http://www.globalpresence.realinstitutoelcano.org/en/>, last visited: 3 December 2018. For the Soft Power Index, see: 'The Soft Power 30', *Portland Communications*, 2018, available at: <http://softpower30.com>, last visited: 3 December 2018.

²⁵ For more on "soft power", see: Nye, J., *Soft Power: The Means to Success in World Politics* (New York City: Public Affairs, 2004), p.5.

²⁶ For example, the Soft Power Index ignores "hard" (coercive) power altogether, while the Global Presence Index merely counts various forms of military equipment – warships, aircraft, etc. – to indicate military presence. However, although one country might have ten more frigates than another, for example, it does not mean it has greater presence. Those vessels may be smaller, technologically inferior, and/or unable to operate at range. See: 'Methodology: What is the Elcano Global Presence Index?', *Elcano Royal Institute*, 2018, available at: <http://www.globalpresence.realinstitutoelcano.org/en/methodologic>, last visited: 30 November 2018.

²⁷ For examples of such confrontation, see: Rogers, J. and Andriy Tyushka, 'Hacking in the West: Russia's "anti-hegemonic drive" and the strategic narrative offensive', *Defence Strategic Communications*, 2:1 (2017); Rogers, J. and Andriy Tyushka, 'Russia's "Anti-hegemonic" Offensive: A New Strategy in Action', *Diplomaatia*, December 2016, available at: <https://www.diplomaatia.ee/en/article/russias-anti-hegemonic-offensive-a-new-strategy-in-action>, last visited: 25 August 2017.

²⁸ For an overview of the tyranny of distance, see: Boulding, K., *Conflict and Defence: A General Theory* (New York City: Harper Torchbooks, 1962), pp. 261-263; Webb, K., 'The Continued Importance of Geographic Distance and Boulding's Loss of Strength Gradient', *Comparative Strategy* 26:4 (2007). See also: O'Sullivan, P., *Geopolitics* (London: Croom Helm Ltd., 1986), pp.53-76.

2. Enlarging the focus: Including more countries

Given the potential for further economic and geopolitical change, it makes little sense to confine the Audit to only the permanent five members of the United Nations Security Council, alongside Germany, India and Japan. This prevents a wider comparison of the world's major powers – both existing and potential – in terms of their ability to both shape and disrupt the geopolitical system. It is therefore necessary to extend the Audit's focus.

The ideal international group from which to draw a wider group of countries is the Group of Twenty (G20), which includes nineteen sovereign states and one international organisation, as shown in Figure 1.

Figure 1: The G20

Argentina	Australia	Brazil	Canada
China	European Union	France	Germany
India	Indonesia	Italy	Japan
Mexico	Russia	Saudi Arabia	South Africa
South Korea	Turkey	United Kingdom	United States

2.1 The G20 in a nutshell

The G20 emerged in 1999 in the aftermath of the financial crises in Russia and East Asia. Initially set up as an intergovernmental forum of finance ministers and central bankers to discuss financial and economic matters, the G20 gained further prominence after the “Great Recession” in the late 2000s. Appreciating the likely long-term strategic implications of this economic crisis, the established industrial powers – at the time, the Group of Eight (G8) – realised that a larger forum was required to help regulate international relations between the major powers, not least because of the emergence of an array of countries other than the industrialised democracies of Western Europe, North America and Japan. Since then, the G20 has been hosted annually by its members, with the latest summit held in Argentina in November 2018.

2.2 Why the G20?

For the following reasons, the G20 is a useful group from which to select those countries that have achieved “major power” status:

- Its participants produce 85 percent of global economic output;
- It has 66 percent of the world's population;
- It accounts for 75 percent of international trade;
- It makes up 80 percent of global investment.²⁹

²⁹ ‘About the G20’, *Group of 20*, 2018, <https://www.g20.org/en/g20/what-is-the-g20> last visited: 30 November 2018.

In addition:

- It includes all permanent members of the United Nations Security Council;
- It contains fourteen of the biggest military spenders in the world;³⁰
- It contains eleven of the world's largest countries by land area.³¹

Moreover, aside from the economic and geopolitical significance of its participants, the G20 has additional importance because there is still such difference between them. On the one hand, the G20 includes industrial pioneers such as the UK and the US, which have evolved over the past 200 years into mature, wealthy democracies. On the other hand, the G20 includes up-and-coming nations such as South Korea and China, but also emerging economies such as Brazil and Indonesia. Insofar as its members are likely to wax and wane significantly over the years ahead, the G20 countries are the ideal group for the Audit to assess.

2.3 Replacement of the European Union with Nigeria

As the EU is not a country, and insofar as there is insufficient data to ascertain its geopolitical capability – the sum of its parts would not be representative of its own performance – it has been excluded from the Audit. Instead, Nigeria has been included to provide better representation of Africa. Indeed, Nigeria is now the largest economy in Africa, as well as the continent's most populous country.³² Nigeria is also expected to increase markedly in economic weight and population over the coming half-century, with perhaps as many as 410 million citizens by 2050, and its economy producing more in terms of nominal Gross Domestic Product than Italy.³³

³⁰ *The Military Balance 2018* (London: International Institute for Strategic Studies, 2018).

³¹ 'Land Area', *CIA World Factbook*, 2018, available at: <https://www.cia.gov/library/publications/the-world-factbook/rankorder/2147rank.html>, last visited: 3 December 2018.

³² For Nigeria's Gross National Income (Atlas method, current US\$), see: 'GNI, Atlas method (current US\$)', *The World Bank*, 2018, available at: <https://data.worldbank.org/indicator/NY.GNP.ATLS.CD?locations=NG>, last visited: 30 November 2018.

³³ See: 'World Population Prospects 2017', *United Nations Department of Economic and Social Affairs*, 2017, https://esa.un.org/unpd/wpp/Publications/Files/WPP2017_KeyFindings.pdf, last visited: 30 November 2018 and 'The World in 2050', *PwC*, February 2017, available at: <https://www.pwc.com/gx/en/issues/economy/the-world-in-2050.html>, last visited: 3 December 2018.

3. Refining the assessment framework

Increasing the number of countries in the Audit means additional changes must be made to the framework and indicators that were used in its first iteration. Primarily, this is because the data used in the 2017 version is not available either in whole or part for many of the twelve additional countries. The assessment framework has therefore been modified to more effectively organise the different indicators, not only conceptually – as with the 2017 version – but also in accordance with function. A new grouping has also been added to extend the audit to assess the political resolve of each country. As Figure 2 shows, the updated Audit is therefore now organised around four functional “attributes”: “National Base”, “National Structure”, “National Instruments” and “National Resolve”, which in turn organise a plethora of pillars and indicators.

Figure 2: The Framework of Geopolitical Capability (weights in percentages)

ATTRIBUTE 1: NATIONAL RESOLVE (10%)																								
1. Government efficacy (7%)				2. Economic resolve (1%)				3. Strategic resolve (1%)				4. Altruistic resolve (1%)												
ATTRIBUTE 2: NATIONAL STRUCTURE (40%)								ATTRIBUTE 3: NATIONAL INSTRUMENTS (30%)																
PILLAR 1: Economic Clout (15%)				PILLAR 2: Technological Prowess (10%)				PILLAR 3: Cultural Prestige (15%)				PILLAR 1: Diplomatic Leverage (15%)				PILLAR 2: Military Might (15%)								
5. Gravitational pull (1%)	4. Commercial reach (1%)	3. Financial control (1%)	2. Corporate size (2%)	1. National income (10%)	5. Health (1%)	4. Innovativeness (1%)	3. Research outlay (1%)	2. Infrastructure (3%)	1. Knowledge base (4%)	5. Economic allure (1%)	4. Sporting attainment (1%)	3. National appeal (1%)	2. Discursive dominance (2%)	1. Freedom to create (10%)	5. Passport power (1.5%)	4. Developmental capacity (1.5%)	3. Organisational penetration (3%)	2. Diplomatic centrality (3%)	1. Overseas missions (6%)	5. Global reach (1.5%)	4. Military-industrial base (1.5%)	3. Projection forces (3%)	2. Nuclear arsenal (3%)	1. Defence spending (6%)
ATTRIBUTE 4: NATIONAL BASE (20%)																								
1. National wealth (10%)						2. Population structure (6%)						3. National spread (3%)						4. Self-sufficiency (1%)						

These attributes define the building blocks of national geopolitical capability:

1. **National base** captures the underlying and largely unchangeable foundations of national capability, from which any major power must draw to generate the structures and instruments to protect and/or extend both itself and its interests;
2. **National structure** captures the “infrastructure” of national capability, i.e. those structures developed to draw off the national base, to generate deployable capabilities and instruments;
3. **National instruments** capture the diplomatic and military tools generated by the national structure for self-defence and to facilitate engagement with the wider world;
4. **National resolve** captures the largely “intangible” dimension of geopolitical capability, in terms of the overall efficacy of each major power’s central government, as well as its willingness to uphold specific capabilities to defend itself and affect change at the international level.

As shown in Figure 2, both national base and national resolve are each comprised of four different indicators, while national structure and national instruments are ordered by five different pillars. The three pillars of national structure are:

1. **Economic Clout**, which captures the size and strength of the national economic structure;
2. **Technological Prowess**, which captures the capacity and sophistication of the national structures for research and development;
3. **Cultural Prestige**, which captures the ability of the national structure to facilitate creativity and attract other people to the national cause.

Meanwhile, the two pillars of national instruments are:

1. **Diplomatic Leverage**, which captures the diplomatic tools available to the nation to engage with the wider world;
2. **Military Might**, which captures the strategic tools available to influence, intervene, dissuade and deter.

Each pillar is then further divided into specific indicators, some of which are then divided into component parts, with each indicator being allocated a specific weight depending on its significance in the generation of national geopolitical capability (see Appendix B for a list of sources).

3.1 Indicators

3.1.1 National Base (Equivalent to 20% of the total)

This attribute is divided into four indicators:

Indicators (weight)	Justification
a. National wealth (10%) <ul style="list-style-type: none"> • Net wealth (total, US\$) 	A high level of net total wealth indicates previous economic dynamism and technological ingenuity. It also indicates a robust base from which to draw in the event of emergency conditions, such as geopolitical confrontation.

<p>b. Population structure (6%)</p> <ul style="list-style-type: none"> ● Population size (total) ● Median age (years) 	<p>A large and well-structured population indicates the availability of citizens ready for work, both in the economy as well as government and the armed forces.</p>
<hr/>	
<p>c. National spread (3%)</p> <ul style="list-style-type: none"> ● Land area (total, km²) ● Exclusive Economic Zone (total, km²) 	<p>The national spread of the country – measured both in terms of its land area and its Exclusive Economic Zone – indicates the size of the resource yield that can be extracted and unleashed to fuel the national structure, particularly the economy.</p>
<hr/>	
<p>d. Resource self-sufficiency (1%)</p> <ul style="list-style-type: none"> ● Energy self-sufficiency (percentage) ● Food energy supply adequacy 	<p>A high degree of self-sufficiency in terms of key resources – energy and food – indicates an advanced energy and/or agricultural sector, as well as autonomy in the production of essential resources, and (percentage) the capacity to avoid coming under the influence of foreign suppliers.</p>

3.1.2 National Structure (Equivalent to 40% of the total)

This attribute is divided into three pillars:

3.1.2.1 Economic Clout (Equivalent to 15% of the total)

This pillar is divided into five indicators:

Indicators (weight)	Justification
<p>a. National income (10%)</p> <ul style="list-style-type: none"> ● Gross National Income (total, US\$, Atlas Method) 	<p>The size of the national income indicates the overall size and performance of national economic – and to an extent, technological – structures. Gross National Income incorporates both domestic and foreign earnings, better reflecting the total economic yield.</p>
<hr/>	
<p>b. Corporate size (2%)</p> <ul style="list-style-type: none"> ● Forbes 2000 companies (total) ● Forbes 2000 companies (average position) 	<p>A large number of the most successful corporations in the world headquartered in a country indicates not only the health of its business environment, but also its overall economic strength.</p>
<hr/>	
<p>c. Financial control (1%)</p> <ul style="list-style-type: none"> ● Global rank of the capital / primate city (score) ● Foreign Direct Investment net outflows, US\$) 	<p>Possession of one of the global economy’s leading “command centres” indicates the existence of both an extensive financial sector (and attendant educational and legal services) and an advanced economy. (Total Meanwhile, a high quantity of outward net foreign direct investment indicates significant control over the economic fortunes of foreign lands.</p>
<hr/>	
<p>d. Commercial reach (1%)</p> <ul style="list-style-type: none"> ● Merchandise and service exports (total, US\$) 	<p>A large quantity of merchandise exports indicates a well-developed industrial sector, while a large amount of service exports indicates the existence of a robust financial sector. In turn, both indicate a country’s global commercial reach.</p>

e. Gravitational pull (1%)

- Net positive migration (total, 2017-2013)

A high level of net positive migration indicates the existence of a powerful and expanding economy, demanding additional new workers. In turn, this results in large remittance flows back to the migrants' homelands, drawing them into the orbit of the migrants' country of residence.

3.1.2.2 Technological Prowess (Equivalent to 10% of the total)

This pillar is divided into five indicators:

Indicators (weight)

Justification

a. Knowledge base (4%)

- Education Index (score)
- Top 200 universities (total number and average position)
- Think tanks (total)

A country's performance in relation to the Education Index - calculated by the population's mean years of schooling and the expected years of schooling - indicates its overall level of educational attainment. Likewise, a large concentration of the world's top 200 universities indicates the reach and success of a country's tertiary education sector. Meanwhile, a large number of think tanks indicates not only the level of specialist knowledge a country can generate, but also its ability to spread knowledge.

b. Infrastructure (3%)

- Level of urbanisation (percentage)
- Transport system
 - o Railway density (railways per km²)
 - o Merchant marine (gross tonnage, total)
 - o Commercial air system (passengers carried by national carriers, total)
- Access to communication (score)
- Usage of communication (score)

A "dense" infrastructure of modern cities and transport systems indicates a high level of technological development. Equally, the availability and sophistication of modern communications systems - 4G and broadband services, etc., and the ability of citizens to use them - indicates the level of development of a country's "knowledge economy", which is widely understood to be critical to its future economic success.

c. Research outlay (1%)

- Research and Development Spending (total, US\$)

The size of the Research and Development spending indicates the likely scale and dynamism of a country's industrial and technological base.

d. Innovativeness (1%)

- Nobel Prizes received in physics, chemistry, medicine and physiotherapy (total, 2017-2013)
- Patent applications (average, 2016-2012)
- Trademark applications (average, 2016-2012)

Numerous resident Nobel Prize winners (in chemistry, physics, and medicine and physiotherapy) over a sustained period (five years) indicates the degree to which a country can generate potentially revolutionary new knowledge. Meanwhile, the number of patent and trademarks applied for over a similar period indicates the size and sophistication of its engineers and industrial designers.

- e. Health (1%)**
- Healthy life expectancy (years)
- A long, healthy life expectancy among the national population indicates the existence of an advanced and comprehensive apparatus of sanitation, an extensive system of public health education, and sophisticated and universal health provision.
-

3.1.2.3 Cultural Prestige (Equivalent to 15% of the total)

This pillar is divided into five indicators:

Indicators (weight)	Justification
<p>a. Freedom to create (10%)</p> <ul style="list-style-type: none"> • Personal freedom (score) • Internet freedom (score) • Press freedom (score) 	<p>The presence of a free and open society – across all levels – indicates the existence of political stability, as well as an environment conducive to the formation of economic wealth, technological innovation and cultural creativity.</p>
<p>b. Discursive dominance (2%)</p> <ul style="list-style-type: none"> • Top 54 Publishers (total revenue, US\$) • Top 10 Million websites using the official or national language (total) • International organisations using the official or national language (total) 	<p>The ability to communicate ideas indicates the capacity to spread knowledge and participate in the global competition over ideas and values. Equally, the number of forums – such as websites and international organisations – using the primary national language indicates discursive dominance over the means of communication at the global level.</p>
<p>c. National appeal (1%)</p> <ul style="list-style-type: none"> • Overseas tourist arrivals (total) • International students from overseas in tertiary educational institutions (total) 	<p>A high number of tourists and foreign students travelling to the national homeland indicates the level of appeal a country possesses at the international level.</p>
<p>d. Sporting attainment (1%)</p> <ul style="list-style-type: none"> • FIFA ranking (score) • Olympic medals (Gold, Silver, Bronze) 2016 (score) 	<p>A high FIFA score and, therefore, ranking, and a large take of Gold, Silver and Bronze medals at the latest Summer Olympic Games indicates a well-resourced and competitive sports community, ready to capture global attention.</p>
<p>e. Economic allure (1%)</p> <ul style="list-style-type: none"> • Top 100 Brands (total value, US\$) 	<p>A large concentration of the world's Top 100 brands suggests – aside from economic dynamism – a strong national reputation for industrial design and/or commercial success.</p>

3.1.3 National Instruments (Equivalent to 30% of the total)

This attribute is divided into two pillars:

3.1.3.1 Diplomatic Leverage (Equivalent to 15% of the total)

This pillar is divided into five indicators:

Indicators (weight)	Justification
<p>a. Overseas missions (6%)</p> <ul style="list-style-type: none"> ● Overseas resident embassies (and high commissions) (total) 	<p>The existence of numerous diplomatic missions – embassies and/or high commissions (resident in foreign countries) – indicates an extensive diplomatic portfolio, built up to influence and shape the preferences of other countries.</p>
<p>b. Diplomatic centrality (3%)</p> <ul style="list-style-type: none"> ● Membership of the UN Security Council (score, 2018-2014) 	<p>A permanent seat on the United Nations Security Council indicates an elite level of diplomatic standing and the ability to “veto” unfavourable draft resolutions, irrespective of their international support. Meanwhile, for those non-permanent members, the ability to win an election to sit on the Security Council indicates a high level of diplomatic dexterity and reach.</p>
<p>c. Organisational penetration (3%)</p> <ul style="list-style-type: none"> ● Membership of intergovernmental organisations (totals) 	<p>Membership of or participation in intergovernmental organisations – federations of organisations, universal membership organisations, intercontinental organisations and regional organisations – reflects a robust desire and ability to reach into the system of global governance.</p>
<p>d. Developmental capacity (1.5%)</p> <ul style="list-style-type: none"> ● Official Development Assistance (2017-2013, average, US\$) 	<p>A large Official Development Assistance (ODA) budget allocated to international development over a sustained period (five years) not only indicates a high level of economic development (only advanced economies may join the Organisation for Economic Cooperation and Development’s (OECD) Development Assistance Committee (DAC)), but also a willingness and capacity to shape the goals of international development and alleviate poverty, with potential positive feedback in terms of global influence and reputation.³⁴</p>
<p>e. Passport power (1.5%)</p> <ul style="list-style-type: none"> ● Countries to which a citizen can travel without needing a visa (total) 	<p>The ability of a country’s citizens to travel visa-free to foreign countries indicates an active diplomatic service, as well as a high level of international reach and a solid national reputation.</p>

³⁴ Of the twenty major powers, only nine are part of the OECD’s DAC: Australia, Canada, France, Germany, Italy, Japan, South Korea, the United Kingdom and the United States. However, the OECD also gathers ODA data for Russia and Turkey.

3.1.3.2 Military Might (Equivalent to 15% of the total)

This pillar is divided into five indicators:

Indicators (weight)	Justification
<p>a. Defence spending (6%)</p> <ul style="list-style-type: none"> ● Defence spending (2017-2013, average, US\$) 	<p>The amount of money a nation has spent on defence over a sustained period (five years) indicates the likely strength of its armed forces, particularly when viewed alongside other indicators, such as whether it holds a nuclear arsenal and sizeable projection forces (a corresponding and sizeable nuclear arsenal and projection forces indicate the degree to which defence outlay was well-spent or used to quell domestic security problems).</p>
<p>b. Nuclear arsenal (3%)</p> <ul style="list-style-type: none"> ● Deployed warheads (total) ● Reserve warheads (total) ● Second-strike capability (score) ● Striking range (score) ● Delivery platforms (score) ● Nuclear reputation (years) 	<p>A nuclear arsenal indicates a country's willingness and ability to take all necessary measures to defend itself and its national interests. A guaranteed second-strike capability indicates not only technical sophistication, but also a robust ability to both dissuade potential opponents and deter enemies.</p>
<p>c. Projection forces (3%)</p> <ul style="list-style-type: none"> ● Major combatants (total displacement, tonnes) ● Large auxiliary vessels (total displacement, tonnes) ● Average displacement (tonnes) 	<p>A sizeable naval fleet of large surface combatants indicates whether a country is willing and able to operate "long-throw" expeditionary operations, while a hefty auxiliary fleet indicates an extensive degree of global mobility. Without the means to move military equipment, a country lacks the ability to take war to potential enemies, meaning its service personnel – no matter how extensive – have little role beyond that of static defence or for the purposes of internal security.</p>
<p>d. Military-Industrial base (1.5%)</p> <ul style="list-style-type: none"> ● Top 100 Arms and Military Service Companies (total revenue, US\$) 	<p>Large annual revenues from the manufacture of military apparatus and equipment indicates the existence of an extensive military-industrial base. A well-oiled military-industrial base indicates a country's ability to defend itself and/or provide its allies with military supplies – potentially locking them into lasting and institutionalised strategic relationships.</p>
<p>e. Global reach (1.5%)</p> <ul style="list-style-type: none"> ● Total overseas military facilities by type (score) ● Spread of overseas military facilities (score) 	<p>The existence and upkeep of military bases and logistical facilities in overseas territories and/or foreign countries indicates a country's ability to overcome the "tyranny of distance" and to project itself around the world. A pervasive military presence in foreign lands indicates, in turn, geopolitical and diplomatic influence over their strategic decisions and autonomy.</p>

3.1.4 National Resolve (Equivalent to 10% of the total)

This attribute is divided into four indicators:

Indicators (weight)	Justification
a. Government efficacy (7%) <ul style="list-style-type: none"> Effectiveness (score) Stability (score) Rule of Law (score) Lack of Corruption (score) 	Government effectiveness and stability, combined with the rule of law and low levels of corruption, indicates a well-designed and durable domestic political architecture. Together, these characteristics indicate a high degree of government efficacy and the ability to implement and execute political decisions.
b. Economic resolve (1%) <ul style="list-style-type: none"> Outward Foreign Direct Investment (% of GDP) 	The quantity of money (when defined as a percentage of national output) a country is prepared to invest overseas is indicative of its resolve to shape and influence the global economic infrastructure and the economic fortunes of foreign nations.
c. Strategic resolve (1%) <ul style="list-style-type: none"> Defence spending (% of GDP) 	The sum of money (when defined as a percentage of national output) a country is prepared to spend on its defence posture is indicative of the degree of strategic influence it seeks in upholding its national interests and in shaping the international order.
d. Altruistic resolve (1%) <ul style="list-style-type: none"> Official Development Assistance (% of GNI) 	The amount of money (when defined as a percentage of national income) a country is willing to spend on international development is indicative of its altruism at the international level.

3.2 Composite score

The purpose of this framework – comprised of attributes and pillars – is to organise the indicators to provide a composite score for each of the major powers, representing their overall geopolitical capability. For the purposes of comparison between the major powers, scores are also provided for each attribute and pillar.

Insofar as it is not possible to determine the absolute geopolitical capability a country could obtain – even a world state could expand its capabilities within its geographic domain (i.e. the Earth) over time – the Audit is predicated on a *relative* scale. This scale is achieved through a system of ‘distance to a referent country’, in this case the best-performing major power for each component, indicator, pillar and attribute of geopolitical capability, as well as the final score.

Moreover, it is important to point out that the overall score does not represent the potential “warfighting capability” of the major powers. The weights of the indicators would need to be adjusted to accommodate this kind of geopolitical setting, even if – under the conditions of *Pax Atomica* – such an environment could actually exist. Instead, the indicators are ranked in importance (see Appendix C), based on a series of consultations held during Autumn 2018. Specific weights have been applied to each of them to represent prevailing global conditions, where geopolitical competition is waged through a range of different means and modalities.

4. Methodology

The Audit assesses the geopolitical capability available to those countries commonly identified – due to their membership of the G20 (plus Nigeria) – as the twenty-first century’s major powers. It is critical to point out that, owing to a lack of sources, these powers’ overseas territories – unless otherwise stated – are generally not included in the audit (see Appendix D to see where they have been included, and why).³⁵

To recap, the audit includes four different attributes, five pillars (which have no relevance for the computation of the scores, but merely act to organise indicators into a defined framework), 33 different indicators and 62 different components to “frame” and “capture” each major power’s geopolitical standing in the early twenty-first century:

- **Attributes** represent the foundations of the “geopolitical capability” (GC) of each country in the early twenty-first century, including: “National Base” (NB), “National Structure” (NS), “National Instruments” (NI) and “National Resolve” (NR).
- Two attributes – NS and NI – are subdivided into five **pillars**, with each being comprised of five **indicators**. NS is comprised of the pillars “Economic Clout”, “Technological Prowess” and “Cultural Prestige”, while NI is made up of “Diplomatic Leverage” and “Military Might”. The remaining two attributes – NB and NR – are comprised of four indicators each (see Figure 1). Critically, all indicators are afforded a specific weight (see Figure 2).
- All indicators are based on at least one **component**, although some indicators are composites of several. A component is based on data from a range of official or scholarly sources (see Appendix B) and reflects a country’s relative position for the respective measure (e.g. Gross National Income, population size, etc.).

4.1 Data

The indicators are derived from 1240 potential data observations (i.e., 62 different components for each of the 20 countries) from in excess of thirty official, academic or professional sources, all of which were consulted during November 2018.

4.1.1 Data availability

Of the 1240 potential observations used to generate the Audit, 50 (4.03%) were unavailable or missing at the time of reference (see Appendix E for an overview). Of these, 47 (3.8%) may be considered “legitimate” omissions, while three (0.2%) might be considered “illegitimate”. Omissions that are legitimate include data for which certain countries are excluded because they lack assets within a specific field of indication (e.g. they have no top universities, brands, publishers or corporations, etc.). Illegitimate omissions occur where there is simply no available data for the relevant country, even though there should be. If data for a major power was unavailable, it was given a score of 0.

4.1.2 Data quality and format

Data was drawn from reputable sources, such as international organisations or professional and academic sources with an established reputation, such as the World Bank, the Organisation for Economic Cooperation and Development, and agencies of the United Nations, among others.

³⁵ However, it is important to stress that, in some cases, the inclusion of overseas territories boosts the capability of the national homeland quite significantly. Hong Kong’s inclusion boosts, for instance, China’s technological prowess, while the inclusion of Bermuda and the Cayman Islands – significant financial centres in their own right – bolsters the UK’s economic clout.

Both “extensive” data (e.g. total population; total number of Forbes 2000 companies; total tonnage of the major combatants in the naval fleet, etc.) and “intensive” data (e.g. degree of government cohesion; average size of the warships in a naval fleet, median age, etc.) are used in the Audit, with the former indicating the overall sum of geopolitical capability and the latter signifying the qualitative aspects. Wherever “intensive” data has inserted, care has been taken to ensure that the composite score is not skewed heavily against “extensive” components, which indicate the degree of “mass” behind each major power.

Of all the data, only seven sources can be considered “subjective”. These include the World Bank’s “Governance Indicators” and Freedom House’s indicators for “Political Freedom”, “Press Freedom” and “Internet Freedom”. Some indicators – such as the Global Power Cities Index – use a combination of “objective” and “subjective” data. All other indicators are “objective”.

4.2 Formula for computing each major power’s geopolitical capability

The Audit is predicated on the following formula:

c = a country (i.e. a major power);

$S_k(c)$ = a score of national capability attribute k for a country $c, k = 1, \dots, 4$;

$CI_{kj}(c)$ = a capability indicator j of an attribute k for a country $c, j = 1, \dots, n_k$ (here n_k denotes the total number of indicators within an attribute k);

$x_{kji}(c)$ = a component i of a capability indicator j of an attribute k for a country $c, i = 1, \dots, n_{kj}$ (here n_{kj} denotes the total number of components of an indicator j of an attribute k);

Each component $x_{kji}(c)$ is an input from a data source. As every component has a different scale, each must be rescaled for the purposes of comparability across countries for attributes, pillars, indicators and components.

Components are scaled with respect to the best-performing country by dividing each country’s raw value with that of the best performing country for that component, so that the latter is afforded a value of 100.³⁶

$$x_{kji}^*(c) = \frac{x_{kji}(c)}{\max_c x_{kji}(c)} \times 100.$$

The capability indicator j of attribute k for country c can then be calculated as the sum of all its components. As the indicators are of different importance, each is afforded a specific weight (see Annex C) reflecting their significance relative to the total capability score:

$$CI_{kj}(c) = w_{kj} \times \sum_{i=1}^{n_{kj}} x_{kji}^*(c).$$

Each of the four attributes can then be scored for a country c :³⁷

³⁶ Where a lesser value within the raw data indicates *better* performance for a country (for example, for ‘Median age’, the lower the value, the higher the score), the raw value is “inverted” before rescaling with respect to the best-performing country.

³⁷ Where data for a particular country is unavailable (i.e. if a country does not score anything for a particular component), it is awarded 0 for that component.

$$S_k(c) = \sum_{j=1}^{n_k} CI_{kj}(c).$$

For the purposes of presentation, the intermediate results for each pillar are presented separately in Section 5.1 as the sum of the scores of the corresponding indicators.

Based on the scores of the attributes, the total geopolitical capability of each country c is calculated as:

$$GC(c) = \sum_{k=1}^4 S_k(c)$$

This sum indicates the total geopolitical capability available to each country.

To facilitate comparisons, the geopolitical capability scores are then re-scaled relative to the best performing country:

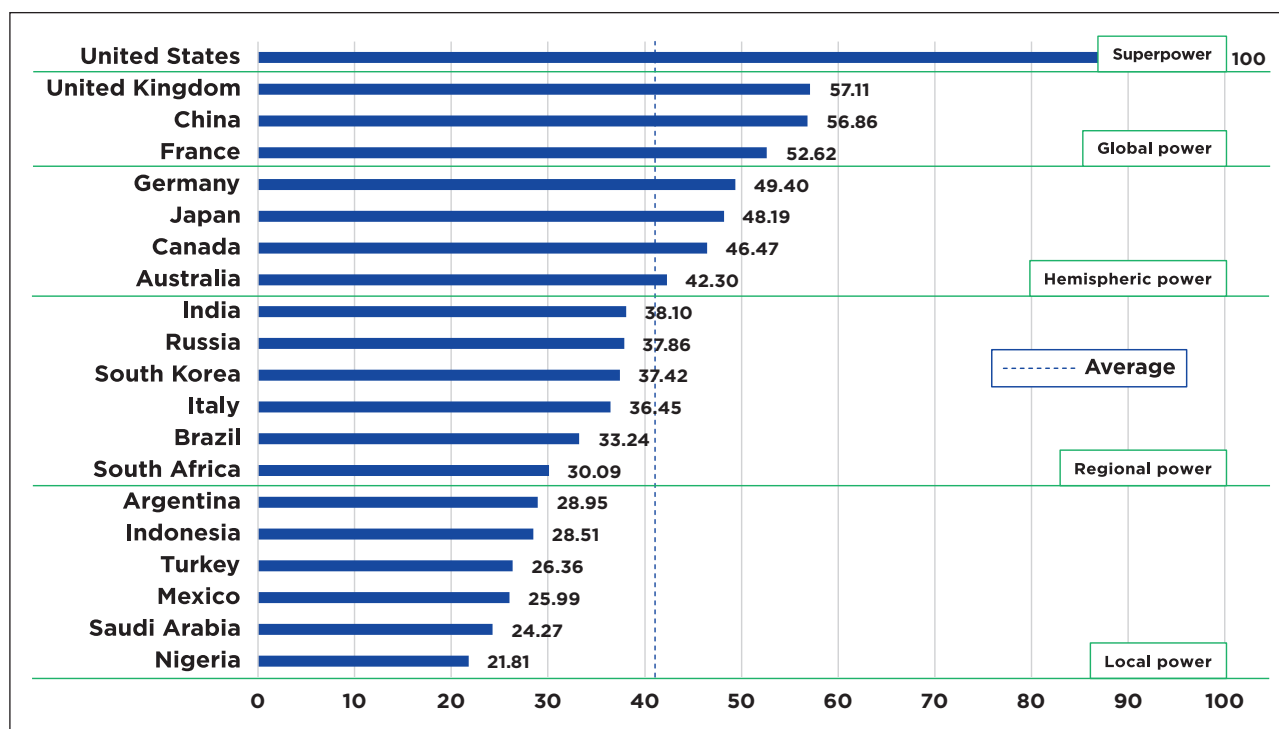
$$GC^*(c) = \frac{GC(c)}{\max_c GC(c)}.$$

This delivers the final result. By scoring the countries on a relative 0-100 scale, it becomes easier to compare each country to the leading power, while simultaneously avoiding an abstract and therefore meaningless scale. Therefore, the Audit provides a benchmark that can be used to compare the major powers with one another and to identify their strengths and weaknesses in total, as well as across different attributes, pillars, indicators and components.



5. Classifying the major powers

Graph 1: The major powers ranked by overall score



As Graph 1 confirms (see Appendix F for the complete data tables), the US remains the global hegemon in terms of overall geopolitical capability, despite recent debate about its incipient decline. It also demonstrates the existence of four additional clusters of countries in terms of overall geopolitical capability:

1. Those holding in excess of 50% of the leader's geopolitical capability;
2. Those holding between 40%-49.9% of the leader's geopolitical capability;
3. Those holding between 30-39.9% of the leader's geopolitical capability;
4. Those holding less than 30% of the leader's geopolitical capability.

Consequently, the relative performance of the twenty countries can be classified using the following categories:

- **Superpower** (80%-100%) – A country with a vast national base and enormous national structure, from which to generate overwhelming national instruments and resolve to project and extend itself and its interests – often comprehensively – around the world.
- **Global Power** (50%-79.9%) – A country with a large national base and/or structure, from which to generate extensive instruments and resolve to project and extend itself and its interests – sometimes selectively – around the world.
- **Hemispheric Power** (40%-49.9%) – A country with a significant national base and/or structure, from which to generate substantial instruments and resolve to defend itself and its interests, primarily within its own hemisphere.
- **Regional Power** (30%-39.9%) – A country with a moderate national base and/or structure, from which to develop modest instruments and resolve to defend itself and its interests, primarily within its own region.

- **Local Power** (below 30%) – A country with a lacking or unharnessed national base and/or structure, from which only weak or uneven instruments and resolve can be generated to try to defend itself and its interests, primarily within its own neighbouring areas.

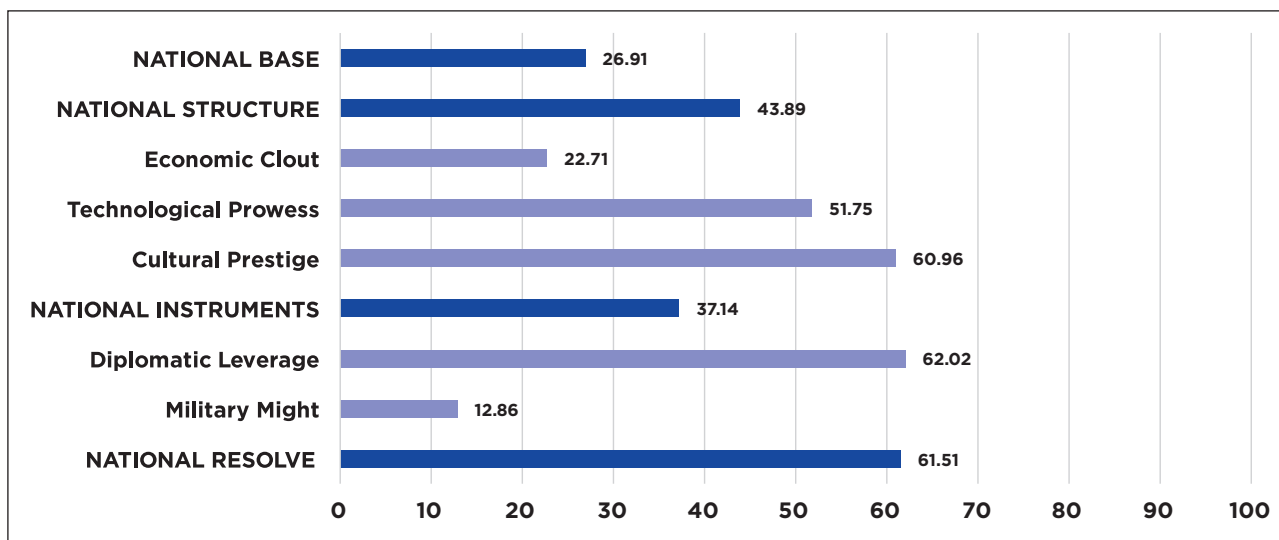
The average (mean) score for the twenty countries is 41.1% of the leading power’s geopolitical capability, a threshold that – should it be rounded down to 40% - might be understood to act as the threshold to true “major power” status. Significantly, less than *half* of the twenty countries reach this threshold of relative performance: most remain little more than “regional” or even “local” powers.

Moreover, apart from China, all those that exceed the threshold are Western powers, implying that the “BRICS” – or at least, the “BRIS” (minus China) – have some way to travel until they catch up. Even more significantly, of the eight countries that exceed the threshold, over half are part of the “Anglosphere”, which also includes the world’s only “superpower” (the US), as well as the strongest of only three “global powers” (the UK). Consequently, “anglobalisation” – the term given to the spread of the customs and institutions of the English-speaking world – is likely to continue for the foreseeable future.³⁸

5.1 Average scores for the major powers

Besides providing an overall score and rank for the twenty countries, the Audit also provides the ability to compare the performance of countries across every attribute and pillar. Before outlining these results in more detail, it is necessary to point out that performance across the different attributes and pillars is not uniform. As Graph 2 shows, the average (mean) level of performance differs quite substantially, with the greatest variation within the pillar national instruments, where the average performance is 62.0 percent for diplomatic leverage and 12.9 percent for military might.

Graph 2: Average performance across attributes and pillars

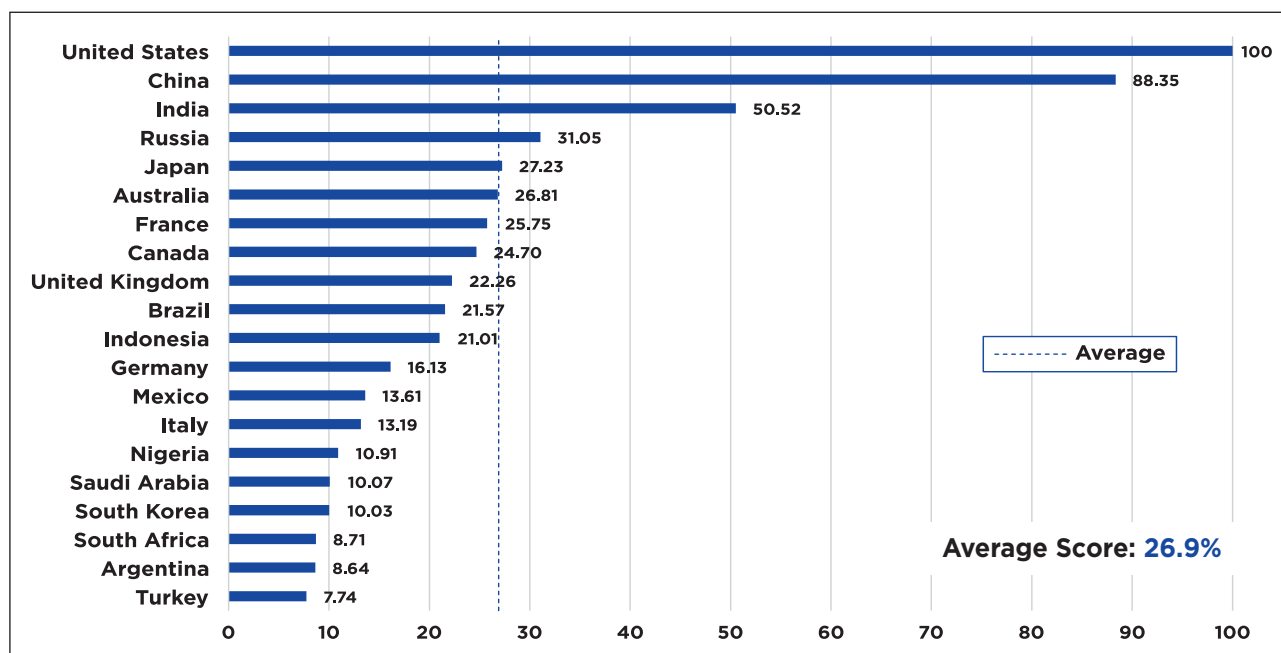


Consequently, it makes sense to view the performance of each of the major powers in relation both to the “frontier” (i.e. the leader, which is the US for all attributes and pillars except national resolve, where Canada is the referent country) and the average (mean) score for each attribute and pillar of geopolitical capability.

³⁸ Ferguson, N. C., *Empire: How Britain Made the Modern World* (London: Allen Lane, 2003).

5.1.1 National Base

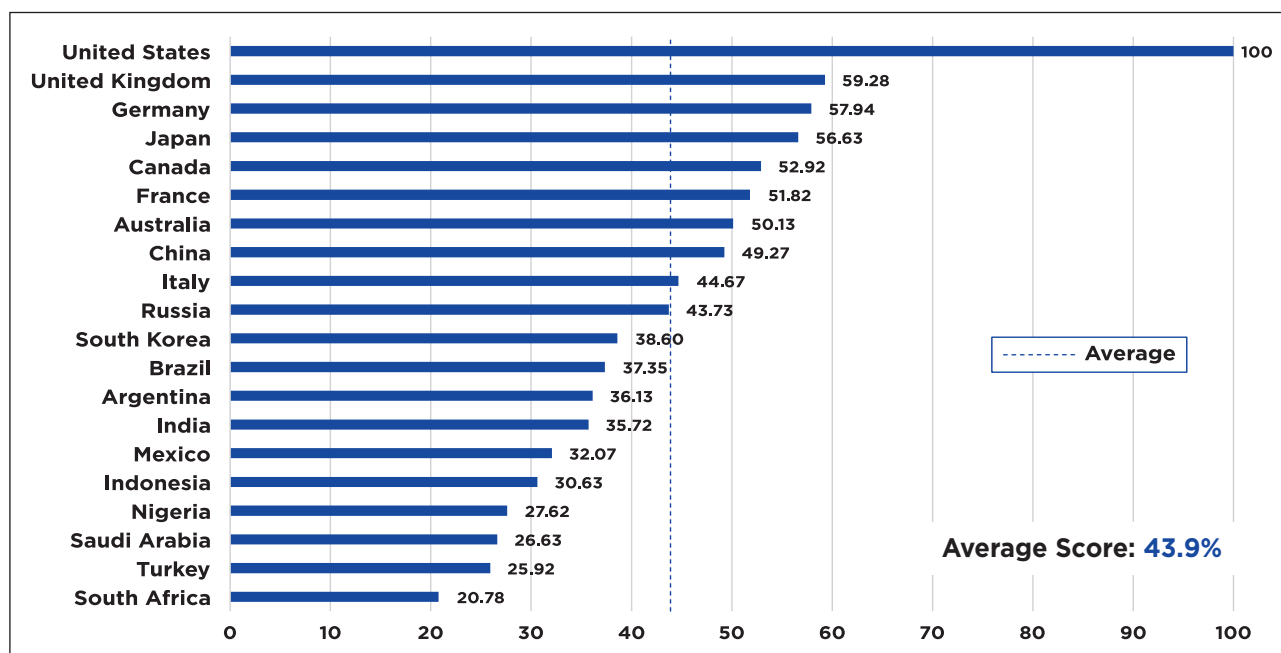
Graph 3: The major powers ranked by national base



As shown by Graph 3, the largest, most populous countries – the US, China and India – perform strongly, although smaller nations – such as Japan, France, Germany and the UK – perform well due to their high level of national wealth, indicating their ability to put their territory and population to work. Russia – the world’s largest and most resource-rich country – trails the leading three powers by some margin, reflecting its ongoing failure to effectively harness its national base and unleash its potential. In the long run, if China, India and Russia can build-up their national structures, their enormous national bases will provide them with the resources and manpower they need to overtake the West, possibly by some margin.

5.1.2 National Structure

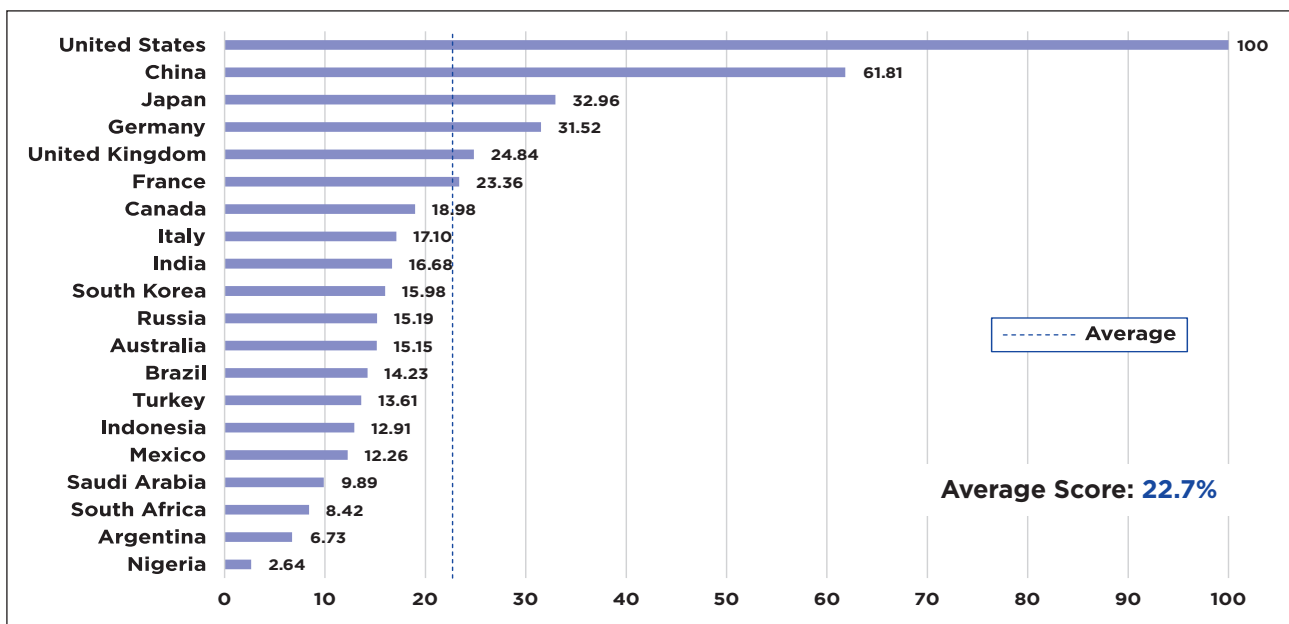
Graph 4: The major powers ranked by national structure



As Graph 4 shows, less than half of the major powers have managed to reach the average level of performance for national structure. Many – not least India and Russia, given their large national bases – have failed to develop national structures with which to unleash their full potential. Meanwhile, it is clear that the US has developed *by far* the most extensive national structure among the major powers, looming over all its counterparts. This vast national structure confirms America’s status as a superpower: drawing off its vast national base, it provides the industrial, technological and cultural might from which it can generate overwhelming national instruments. Furthermore, a clear difference between the leading Western democracies – the UK, Germany, Japan, Canada, France and Australia – and the emerging large economies is self-evident, with the “BIS” (the “BRICS”, bar China and Russia) performing well-below average.

a. *Economic Clout*

Graph 5: The major powers ranked by economic clout



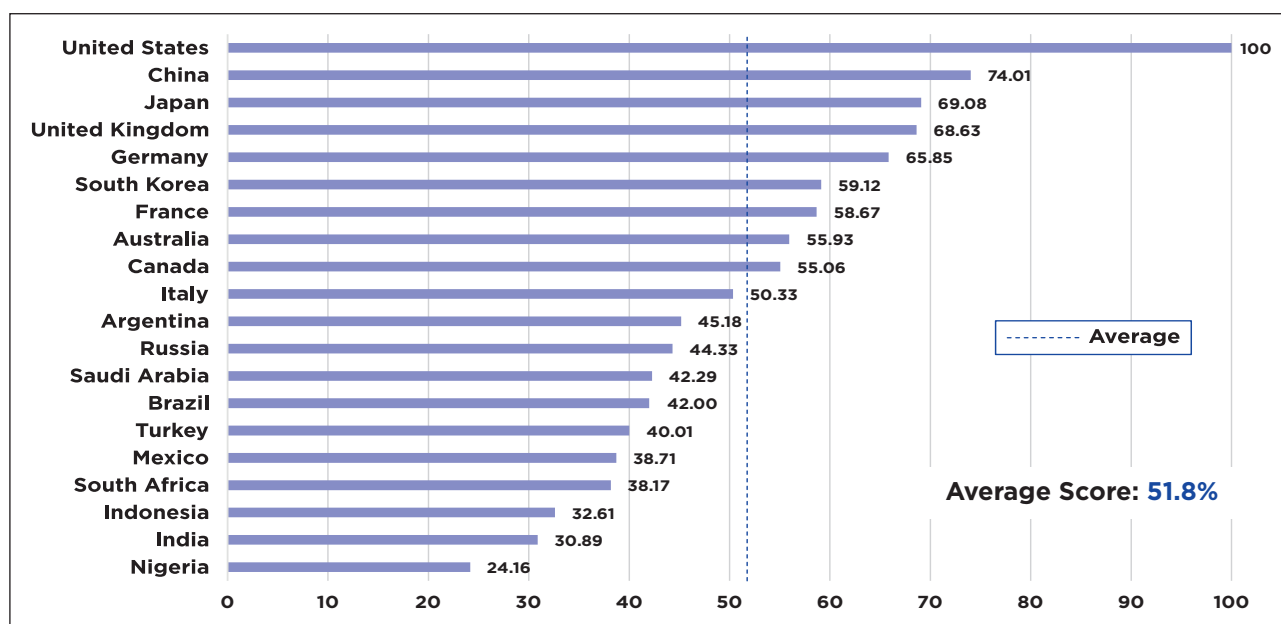
As Graph 5 shows, for this pillar – perhaps the one that matters most for G20 status – most of the major powers perform below average for this category, suggesting that much of their true potential remains unlocked. At the same time, it is evidently clear that China has leap-frogged over all Western powers (other than the US) in terms of economic clout, possessing almost as much as the next two economies – Japan and Germany – put together. Besides the US (which holds a fair lead over China) and China (which looms over all subsequent powers), three clusters of major powers stand out:

1. Japan and Germany, which have an edge over their British and French peers;
2. The UK and France, which stand out above all remaining powers;
3. Everyone else, with the four weakest economies each scoring less than 10% of the leading power’s total.

Moreover, it is worth pointing out that although China’s economic performance now towers over that of the established Western democracies (other than the US), it still has a long way to go until it reaches parity with the world’s only economic superpower.

b. Technological Prowess

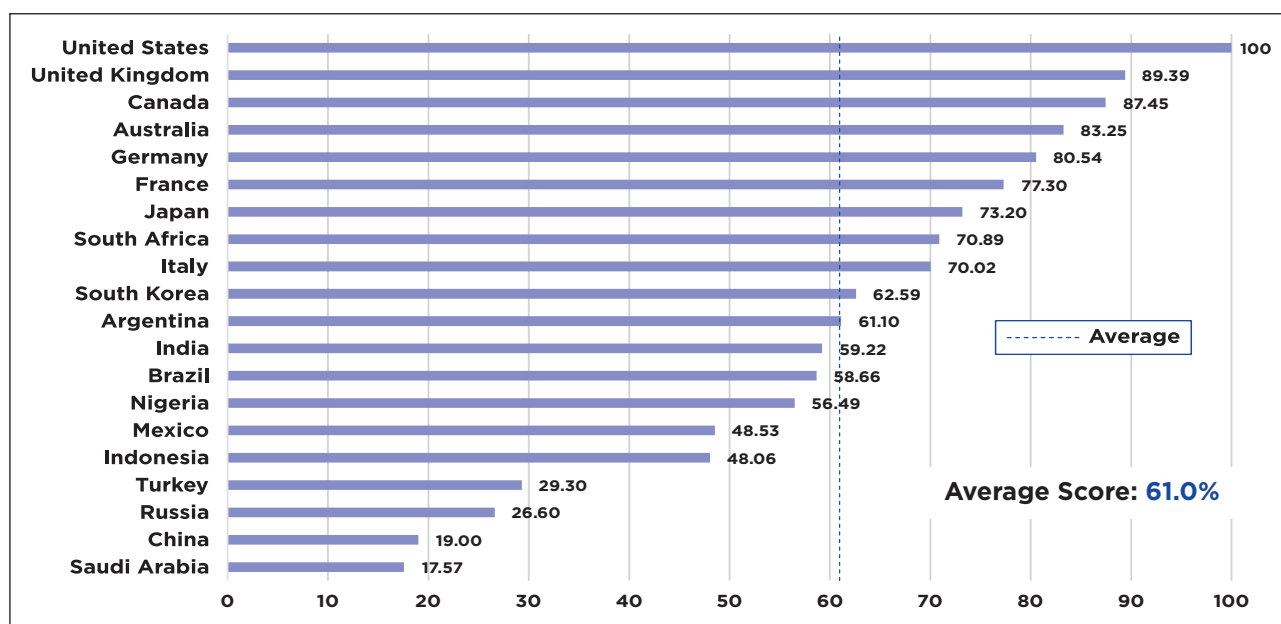
Graph 6: The major powers ranked by technological prowess



As Graph 6 shows, the average score for this pillar is higher than economic clout, although less than half of the major powers manage to exceed it. In particular, the US lead in terms of technological prowess is far less (though still substantial) than in most other areas of national structure. Equally, despite its recent advances, China still has a long way to go until it reaches parity with America’s degree of technological superiority, although it performs well in terms of innovativeness. Unsurprisingly, Japan, the UK, Germany and South Korea perform well in this area too, while the emerging major powers still have some catching up to do until they match their Western counterparts. Finally, for all the talk of India as an emerging technological powerhouse, it would seem that there is a serious discrepancy between the talk and the reality, given that the country languishes second from last.

c. Cultural Prestige

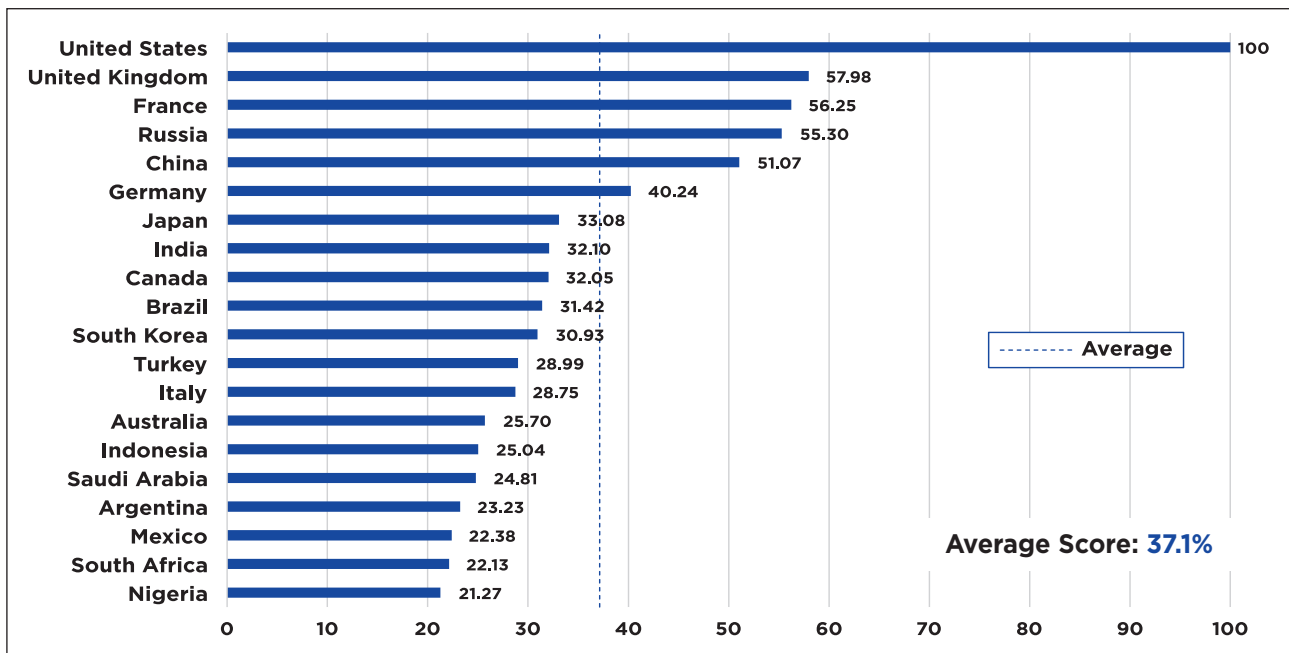
Graph 7: The major powers ranked by cultural prestige



As shown by Graph 7, besides the US (which is again the leader in terms of culture, albeit by a *far* smaller margin) all other English-speaking countries perform strongly for this pillar, reflecting their high levels of freedom and creativity, which contributes to their political resilience and durability. Indeed, the cultural indicators – particularly discursive dominance – reveal that they have a strong hold over the primary means of global communication and may even be intersecting with one another to further entrench their lead. Meanwhile, Germany, France and Japan also perform well in terms of cultural prestige, revealing their creativity and respective “niches” and/or “hinterlands” in the wider global system. Conversely, the authoritarian powers – not least Saudi Arabia, China and Russia – perform particularly poorly in this pillar of geopolitical capability. This is undoubtedly due to their repressive controls over personal, press and internet freedom, which not only impinges on the ability of their citizens to unleash their full economic and technological creativity, but also generates political volatility.

5.1.3 National Instruments

Graph 8: The major powers ranked by national instruments



As Graph 8 shows, over two-thirds of the major powers appear to have great difficulty in utilising their national structures to generate national instruments on a scale comparable even to the average. This should come as no surprise: most available national resources are utilised and ploughed back in to develop the national base or improve the national structure. Consequently, three groups of major powers have established a lead in their ability to generate a more comprehensive set of national instruments:

1. Those – like the US – which can combine highly-developed structures with great mass, both in the diplomatic and military domains;
2. Those – like the UK and France – with well-developed national bases and structures, but lacking in mass; and,
3. Those – like Russia – which live, in part, off the residue of past-superpower status;

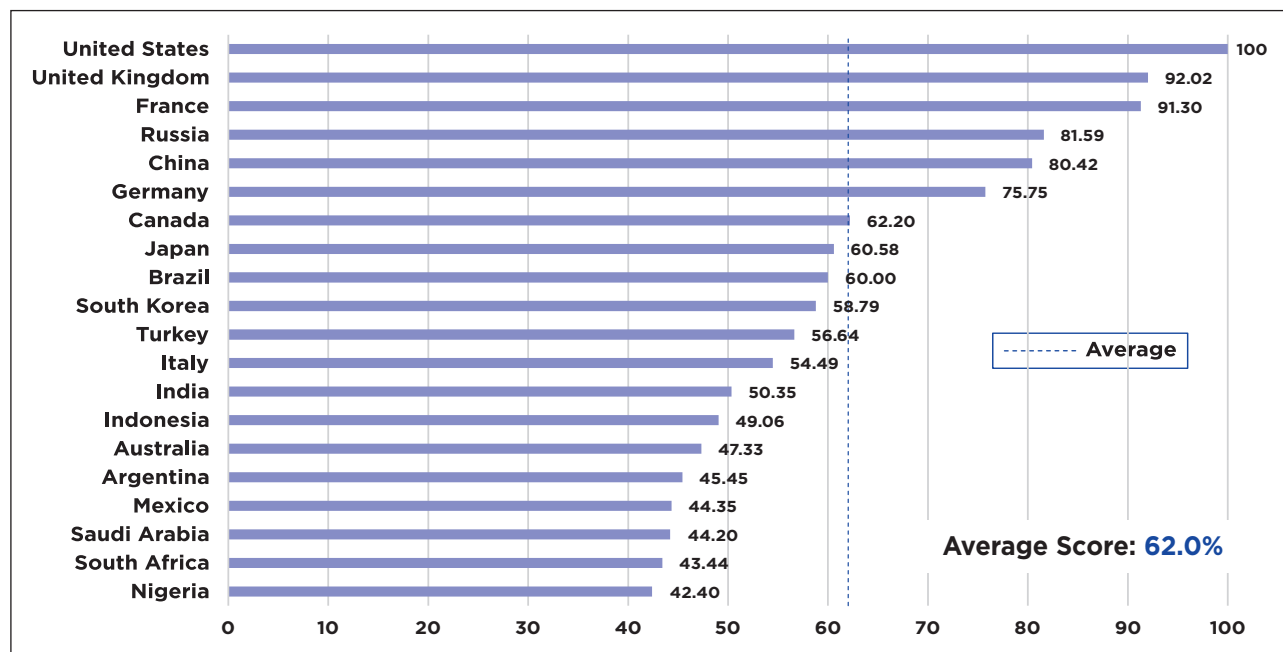
Equally, China has a strong position, reflecting its growing ability to generate instruments from its national structures, particularly its economic and technological infrastructure.

Meanwhile, Germany and Japan – while performing well – fail to reach the level of capability of their “established” peers, not least because of their “uneven” portfolio of instruments, especially

in relation to military might. All other major powers fall below the average, including India, Canada, Italy and Australia.

a. Diplomatic Leverage

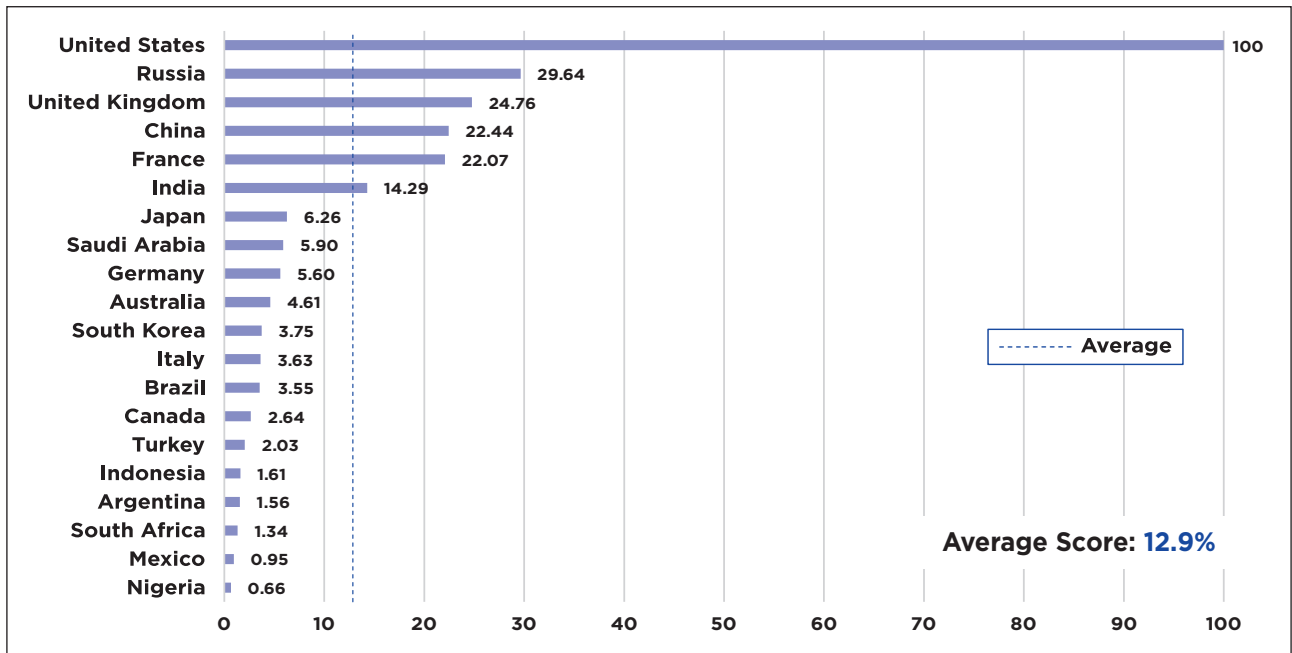
Graph 9: The major powers ranked by diplomatic leverage



As shown by Graph 9, less than half of the major powers manage to perform better than the average. The large Western powers – the US, UK and France – stand in a league of their own, reflecting their long-established diplomatic portfolios and status as permanent members of the United Nations Security Council. The UK performs better than France because of its larger developmental capacity, which is funded by the third biggest ODA budget in the world (after the US and Germany). Just behind the Western diplomatic powerhouses sit Russia and China, the two other permanent members of the Security Council, as well as Germany, with its large diplomatic service and its developmental capacity, which is underscored by the world’s second-largest ODA budget. These are followed by a group of distinctly “hemispheric” and “regional” powers – such as Canada and India – all with a similar degree of diplomatic presence. The emerging economies and Australia – perhaps reflecting its more “concentrated” focus on the Indo-Pacific region – sit towards the bottom of the major powers in terms of diplomatic leverage.

b. Military Might

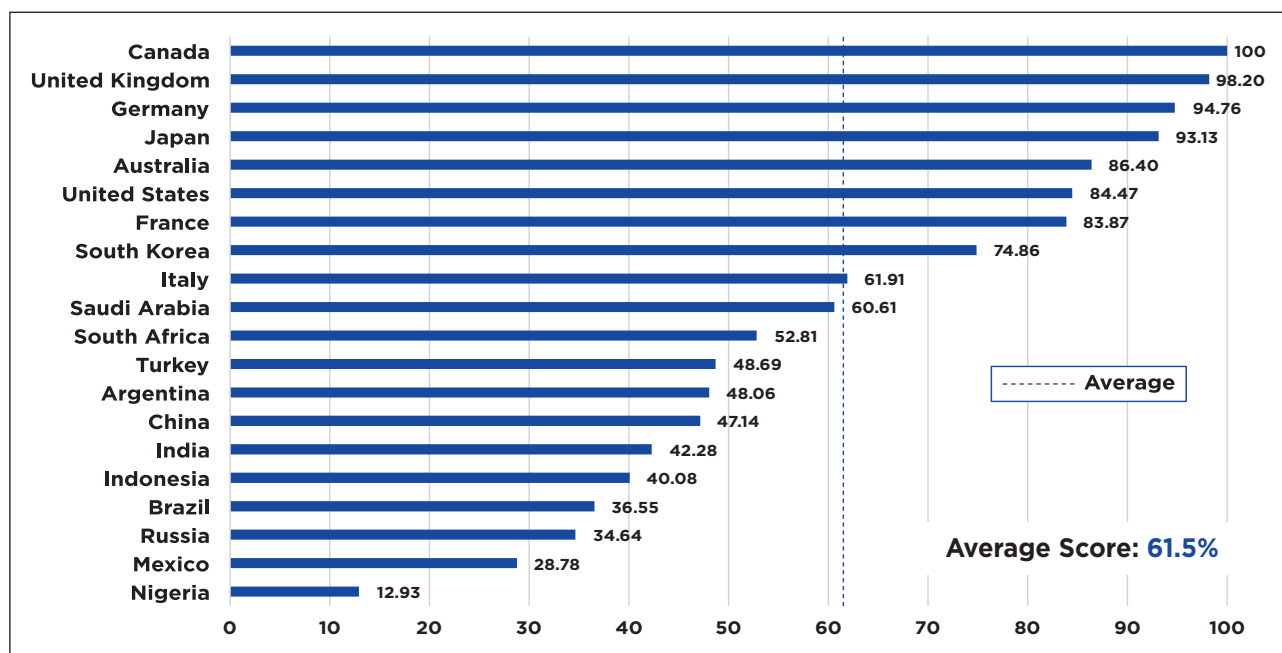
Graph 10: The major powers ranked by military might



As Graph 10 shows, almost three quarters of major powers have extreme difficulty in generating significant military might from their national structures, with only six exceeding a very low average, a consequence of the extensive US lead. In no other area does America – with its vast defence budget, projection forces and global reach – loom so far over its major power peers. Beyond the US, the remaining permanent members of the United Nations Security Council stand out, particularly Russia and the UK, but also France and China, with their substantial nuclear arsenals and/or projection forces. They are followed by India – the only other country included in the Audit with access to its own nuclear weapons – with its sizeable lead over all additional counterparts. Japan and Germany follow India, as well as Saudi Arabia, which has the world’s third-largest defence budget. However, the lack of Saudi nuclear and/or projection forces would imply that Riyadh’s high level of defence spending is used primarily to generate capabilities for internal security – unsurprising given the totalitarian nature of the Saudi regime. Australia, South Korea, Italy and Brazil – with limited capability – are then followed by all remaining major powers.

5.1.4 National Resolve

Graph 11: The major powers ranked by national resolve

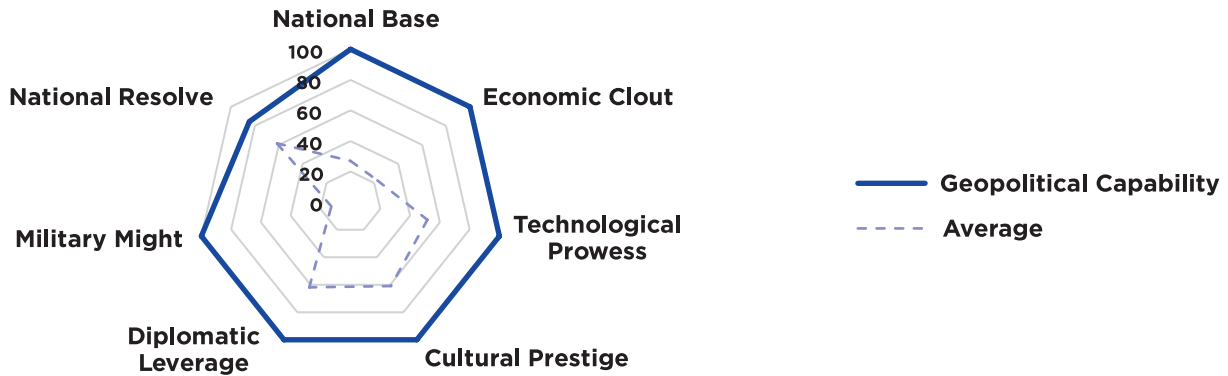


As Graph 11 shows, although the US performs well, it not only loses its commanding lead over its peers – the average level of performance for this attribute is much higher – but also its top position. Instead, a cluster of major powers led by Canada, but also including the UK, Germany and Japan becomes apparent, countries that combine a very high level of government efficacy with – particularly in the UK’s case – a willingness to spend money on all the levers of power and influence. Again, as with many other attributes and pillars, there is a distinct difference between the “established” and “emerging” major power economies. Indeed, due to their lack of transparent government and endemic corruption, Nigeria, Mexico, Russia and Brazil perform particularly poorly, reducing their ability to mobilise their resources for strategic impact.

5.2 Profiles for six selected major powers

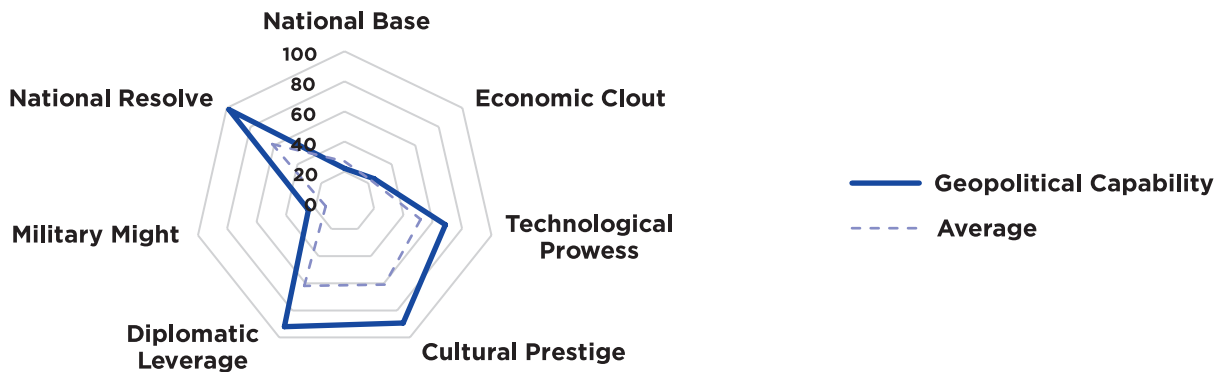
Through the use of radar charts, it is possible to better identify and compare the major powers' geopolitical performance. Six powers - the US, UK, China, Japan, India and Russia - have been chosen due to the differences in their geopolitical capabilities.

5.2.1 United States



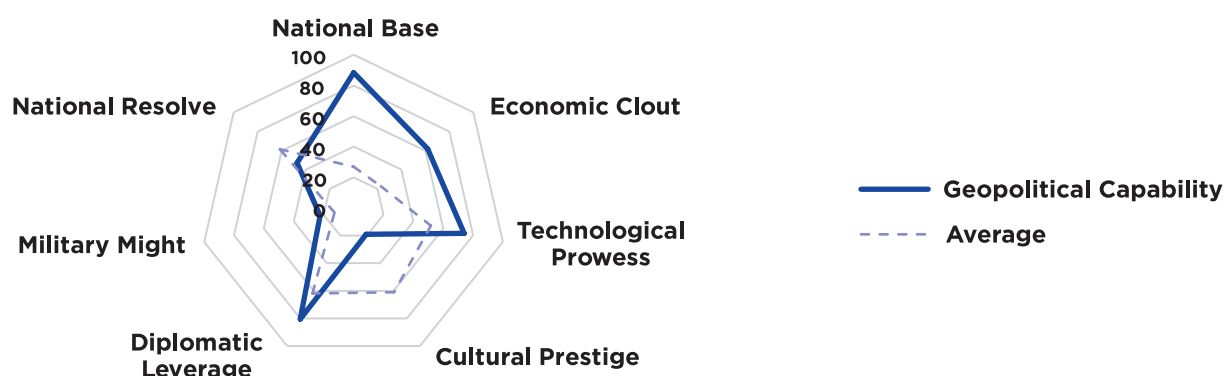
RANK 1 | SCORE 100 - With “well-rounded” geopolitical capabilities, the US is the world’s only superpower. It has a vast national base from which to generate wealth, draw resources and sustain manpower. This national structure underscores an awe-inspiring set of national instruments with which to pursue its global interests. However, if the US wishes to maintain its leading position in the face of a growing competitor with an equally-sized national base - China - it will be forced to work its national structures harder than ever, requiring greater national resolve, especially government reform.

5.2.2 United Kingdom



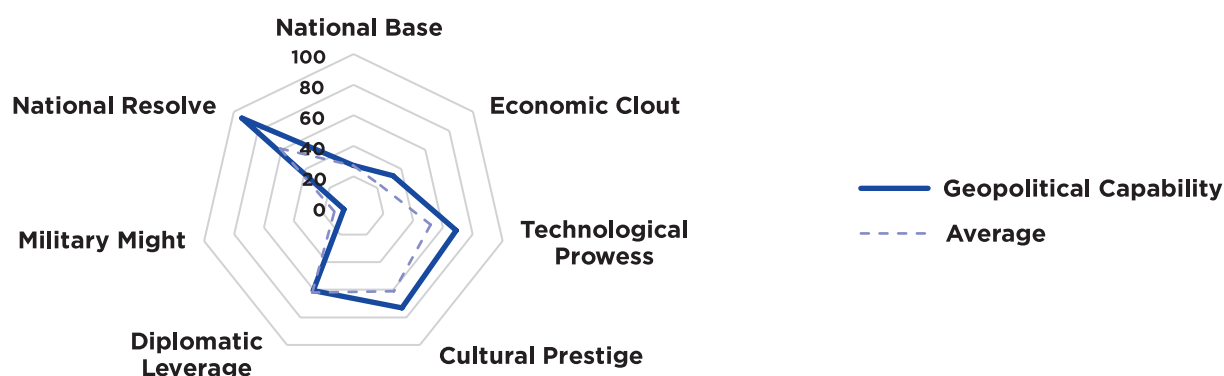
RANK 2 | SCORE 57.1 - For such a small cluster of islands with a modest national base, the UK has developed the structures and instruments with which to pack a formidable punch. While it remains the world’s second strongest power for now, its position is increasingly threatened by a rising China. As it withdraws from the EU, the UK needs to think more strategically in order to maintain its national structures and marshal its instruments - not least military might - to realise the vision afforded by “Global Britain”.

5.2.3 China



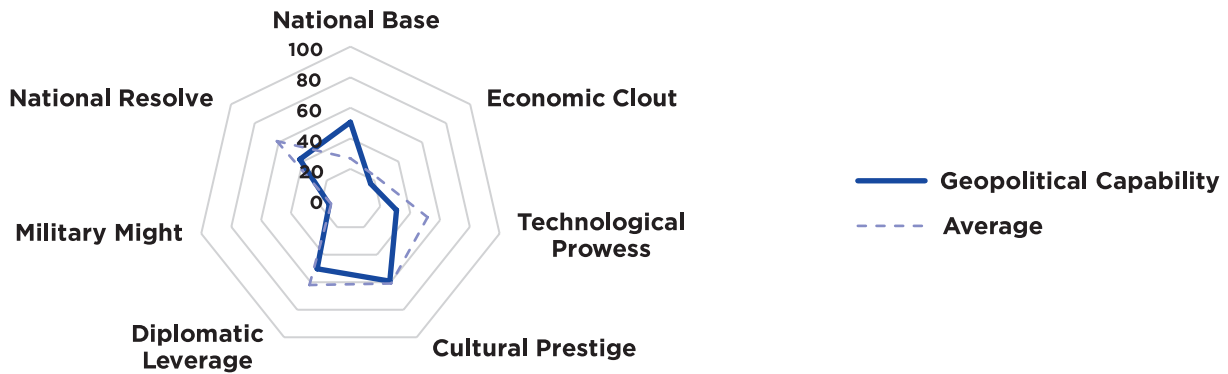
RANK 3 | SCORE 56.9 – With the world’s largest population and a national base second only to the US, China has the potential not only to leave the UK trailing, but also to reach the top spot. However, China still has a long way to go: lacking in cultural prestige and national resolve – namely, the established freedoms needed to unleash and sustain a creative economy, combined with effective government – the country will be forced to confront an array of problems over the coming years if it wants to get its foot in the door of the superpower club.

5.2.4 Japan



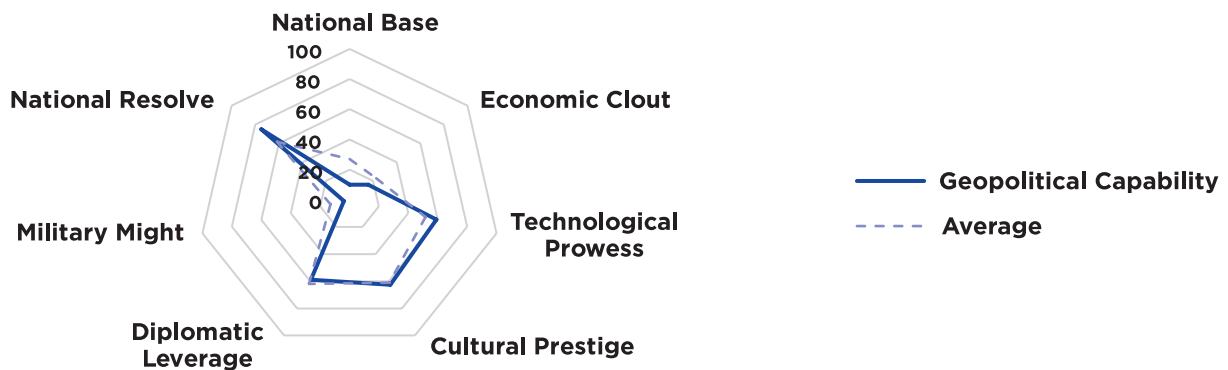
RANK 6 | SCORE 48.2 – Although performing close to the average, Japan is a lop-sided power in terms of its military might. Despite the size of the Japanese national structure, with particularly strong economic clout and technological prowess, it fails to generate the national instruments it might otherwise seek for a power of its size, propelling it from “hemispheric” to “global” power status. However, it remains to be seen if this can be achieved: Japan is beset by an ageing and shrinking population, which is likely to hamper its ability to become a “global” power in the years ahead.

5.2.5 India



RANK 9 | SCORE 38.1 – India performs either close to the average or below it for all categories except for national base. With the world’s second largest population, India has the potential to shoot up the ranking of major powers. By enhancing its freedoms and boosting its cultural prestige – currently, just below the average for the major powers – India has the potential to foster an environment ripe for creativity, which may give it the means to gain on China’s economic and technological lead and transition from a “regional” to a “hemispheric” power. One way of achieving this would be to forge closer links with the “Anglosphere” to tap into the Anglophone countries’ technological prowess and economic clout.

5.2.6 South Korea

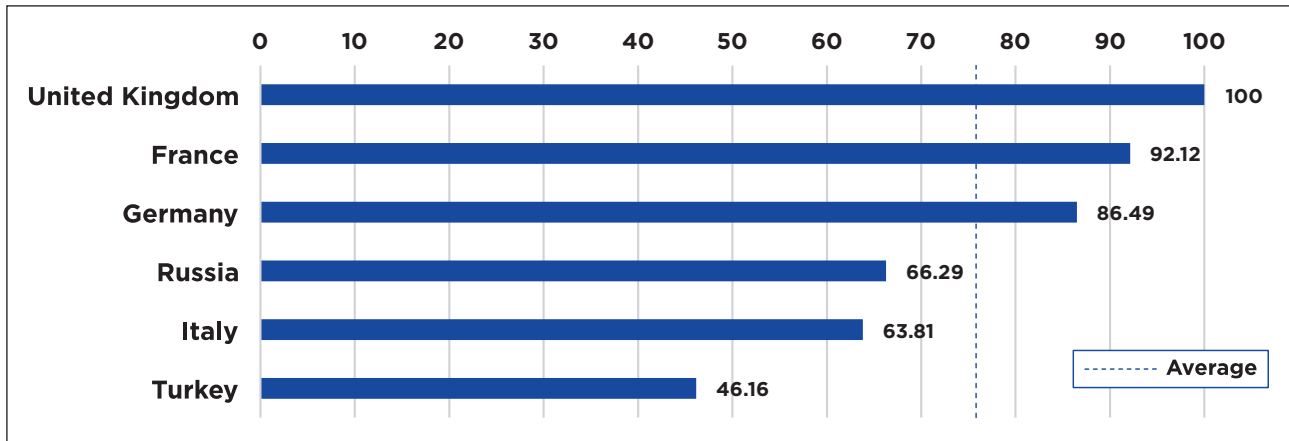


RANK 11 | SCORE 37.4 – Given that its geopolitical capability closely follows the average, South Korea could be identified as the “typical” major power. It has one exception: South Korea has a national base well below average for a major power, meaning that – similarly to the UK – it manages to “squeeze” a lot of capability out of its national structures, particularly in terms of technological prowess. If it can keep this up, it may be able to increase further its economic performance and generate a greater array of national instruments with which to make its presence felt, transitioning from a “regional” to a “hemispheric” power in the process.

6. Profiles for the European powers

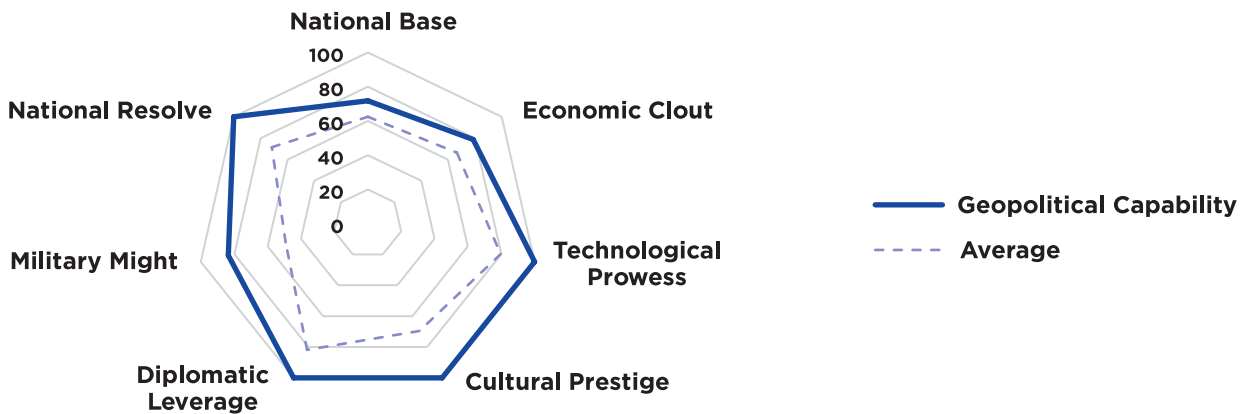
Given the degree to which Germany, Russia and the UK have grown in strategic prominence in Europe, it makes sense to compare the major European powers, if only to better understand their potential for affecting further geopolitical change.

Graph 12: The major powers of Europe ranked by (rescaled) overall score



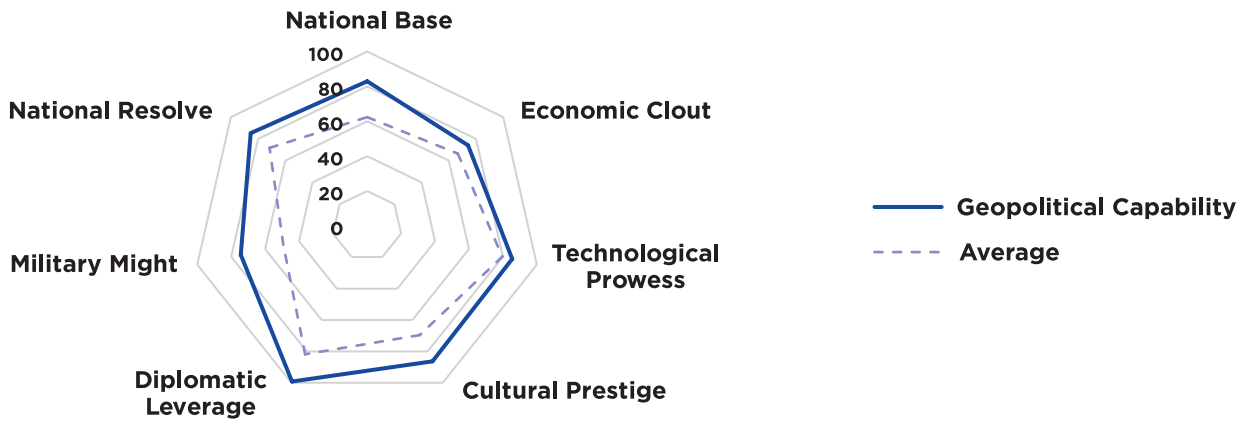
By re-scaling the major European powers against the leading power in Europe (the UK), Graph 12 shows their overall performance in terms of their attributes and pillars of geopolitical capability. The average level of performance is 75.8%.

6.1 United Kingdom



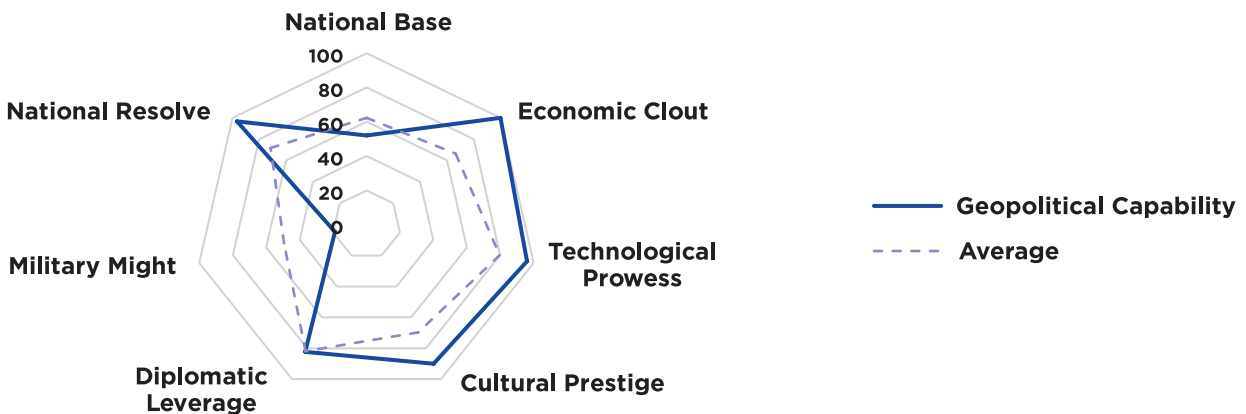
RANK 1 | SCORE 100 - Despite its smaller national base, the UK is the most geopolitically-capable and “well-rounded” of the European major powers. It has a robust capability portfolio from which to draw in the years ahead, particularly as it navigates withdrawal from the EU. In terms of national instruments - in which it leads overall - it has the largest diplomatic leverage and second-biggest military might (after Russia). It has the largest military budget in the EU, while the Royal Navy, in terms of total displacement of large warships and auxiliaries, is larger than the navies of France, Italy and Germany combined. However, despite its inherent strengths, the UK needs to concentrate on developing a robust strategy in the years ahead to cultivate and mobilise its overall capability, particularly if it is to realise the vision of “Global Britain”.

6.2 France



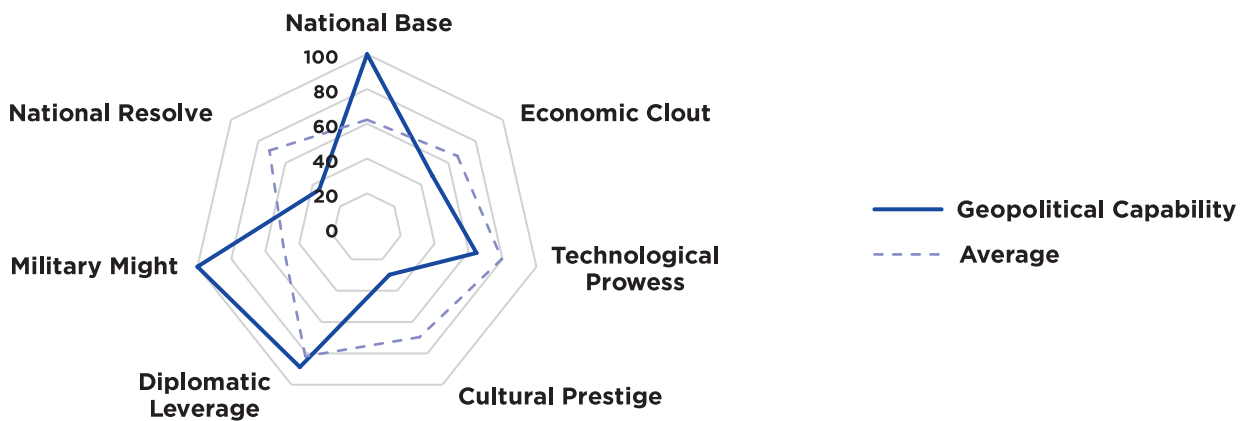
RANK 2 | SCORE 92.1 – Although holding less economic clout and technological prowess than Germany, France remains the pre-eminent continental European power. With a more “well-rounded” set of geopolitical capabilities, it has better national instruments, particularly military might. The French armed forces are less-capable than their British counterparts, but remain robust by European standards. Equally, Paris’ diplomatic leverage remains high; consequently, France has the potential to retain its lead over Germany, especially if it manages to undertake economic reforms and boost its national resolve in terms of the percentage of national income invested in its national instruments.

6.3 Germany



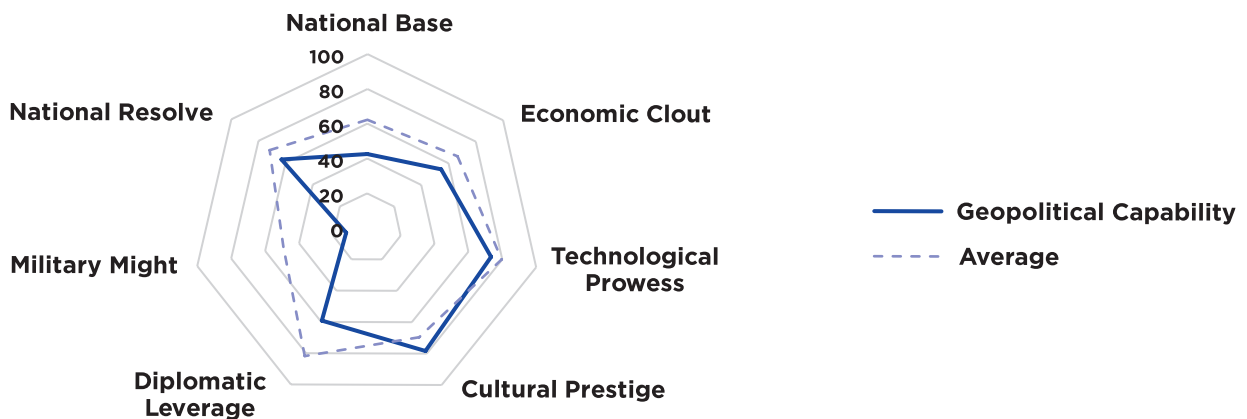
RANK 3 | SCORE 86.5 – Germany offers a mixed-bag in terms of geopolitical capability. It lacks the diplomatic reach of London and Paris, while the *Bundeswehr* (the German military) is weak by British and French standards. For example, in terms of the total displacement of main combatants, the *Deutsche Marine* is just one-sixth the size of the Royal Navy, with HMS Queen Elizabeth weighting significantly more than all the major German warships put together. Germany’s economic clout is by far the largest in Europe, however, while its technological prowess and cultural prestige are second only to the UK. That said, the median age of Germany is 47 years and rising fast, meaning the country has its work cut out to maintain its standing, even in the areas where it performs well.

6.4 Russia



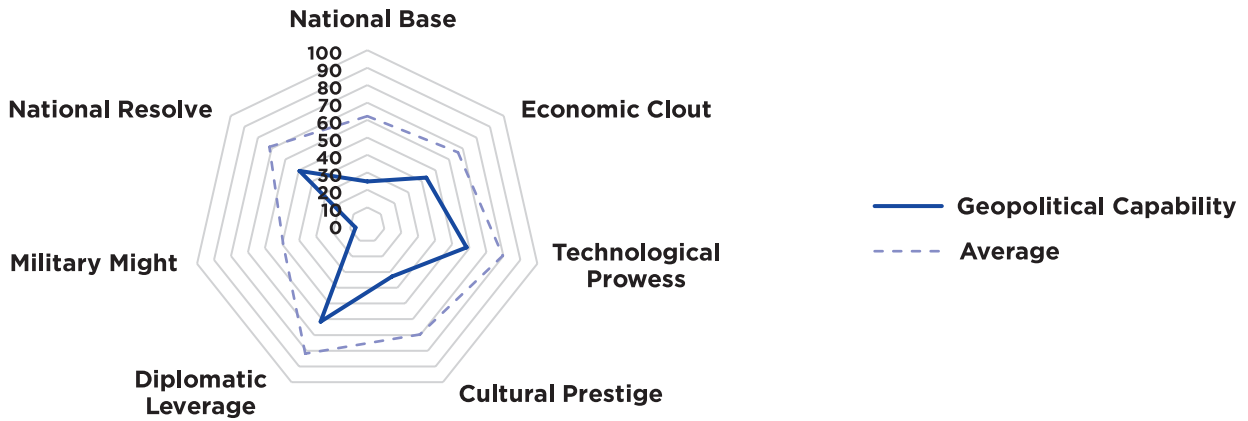
RANK 4 | SCORE 66.3 – Although holding the largest national base and strongest military might – courtesy of the biggest defence budget in Europe and the world’s leading nuclear arsenal – Russia performs below the European average all other areas, apart from diplomatic leverage. Due to a lack of economic diversification, Russia’s economic clout – heavily dependent on the export of energy and raw materials – is smaller than that of Italy and only marginally better than that of Turkey, two countries with substantially smaller national bases. Meanwhile, in terms of cultural prestige and national resolve, Russia’s performance is dire, not least because the country’s authoritarian regime is corrupt, unruly and unresponsive. Without progressive political change, Russia is unlikely to reach the potential its national base could unleash.

6.5 Italy



RANK 5 | SCORE 63.8 – The “Great Recession” hit Italy particularly hard during the late 2000s: economic decay and political instability have prevented the country from reaching the European average in all but one area – cultural prestige – for which Italy has long been known. While stronger in many areas than Russia, Italy lacks the diplomatic leverage and military might to reach the “higher league” of European powers, an issue that will likely prevent it from replacing the UK as part of the EU major power “triad” (alongside France and Germany) after British withdrawal.

6.6 Turkey



RANK 6 | SCORE 46.2 - Although Turkey straddles two continents and holds a commanding geopolitical location enveloping the entrance and exit to the Black Sea, the country is by far the weakest European power, performing below the average in all areas. With an undeveloped national base, Turkey has found it hard to generate national structures sufficient to provide it with a more potent and “well-rounded” set of geopolitical capabilities. That said, the country has a relatively large developmental capacity (due to a sizeable ODA budget, larger than those of both Italy and Russia) which boosts its diplomatic leverage and national resolve, although Turkey’s authoritarian political system continues to impinge on its cultural prestige.

Conclusion

The updated and refined Audit of Geopolitical Capability – based on its four attributes, five pillars, 33 indicators, 62 components and 1240 potential data observations – provides a potent tool to compare the geopolitical capabilities of the world’s major powers, shedding light on the character and relative size of their national bases, structures, instruments and resolve.

Although the Audit is not intended to provide an instrument to ascertain the major powers’ ability to prevail over one another in a major military confrontation – insofar as direct armed confrontation between those that are nuclear-armed is even possible – it does offer an instrument to identify their various strengths and weaknesses, both in an internal and external context, under prevailing conditions. Indeed, due to its unique framework and methodology, the Audit is constructed to account for the increasingly comprehensive nature of geopolitical competition, waged in the “grey zone” between “peace” and “war”, utilising a wide array of national capabilities.

In 2019, the Audit shows that the “BRIS” (the “BRICS”, bar China) – those countries first identified in the previous decade as the world’s major emerging economies – still have some way to go until they reach (let alone exceed) the capacity of the Western powers.

For all the talk of its relative or absolute decline, the US still holds a commanding lead over all its rivals in all but one area. In particular, by utilising what is perhaps the most sophisticated metric of military power yet developed – combining defence spending, nuclear arsenal, projection forces, military-industrial base and global reach³⁹ – the Audit has shown that America’s military might is still very much without equal, revealing the country’s unique ability to integrate its resources into the tools of dissuasion, deterrence and attack. As it moves forward, the question is: does Washington have the national resolve to remain outward-looking and stable, or might it lapse back into its North American fortress or falter under the weight of domestic political intrigue?

Meanwhile, the Audit has shown that the UK – for all the difficulties thrown up by the intricacies of withdrawal from the EU – is still richly endowed with geopolitical capability across many different sectors. Because of its well-developed national structure and instruments, it still remains the world’s second-most capable power. Combined with its strong national resolve, it has the potential – at least – to be able to weather whatever political storms that come its way. The key questions are: does the UK have the vision, and strategy, to transform its capabilities into effective power, both during and following EU withdrawal? In particular, does Britain have the will to allot more resources to research and development to uphold its innovativeness? Does it have the national resolve to allocate more to defence spending to maintain its status as a military power, not least as the international environment becomes more volatile and competitive? And can the UK find a greater level of symbiosis between its cultural prestige – underpinned by a vibrant and independent civil society – and its national priorities and interests, particularly as command over strategic narratives has become central to the new age of global competition?

However, the Audit also shows that China – uniquely among the major powers that were trailing their Western counterparts only twenty years ago – has caught and leap-frogged almost every other major power except for the UK and US (and it has even leapt over them in some areas).

³⁹ As indicators of military cyber power are developed, it is intended that future iterations of the Audit will include this increasingly important dimension of military capability. For a good analysis of the need for such an indicator, see: Inkster, N., ‘Measuring Military Cyber Power’, *Survival*, 59:4 (2017), pp. 27-34.

Moreover, it also illustrates that, should they manage to unleash the full potential of their national bases, the less developed major powers may also be able to close the gap in capability in relation to their more developed peers, including China. However, this is not a foregone conclusion. The question is: how will they face down the many challenges and draw together and cultivate their capabilities, particularly if the geopolitical system becomes still more competitive and malevolent in the years ahead?

In relation to the European theatre, the Audit demonstrates that the UK is the leading power in Europe, enjoying almost an eight-point lead over France and a fourteen-point lead over Germany. While Germany's economic clout is more substantial than that of the UK, Berlin lacks the diplomatic leverage and especially military might – including a nuclear arsenal and projection forces – that London has access to. Germany also has an unstable population structure, due to a very high median age. The questions here are: given its demographic imbalances and lack of national instruments, will Germany retain its economic lead? And to what extent will the EU require the strategic support of the UK over the coming years, not least because of its own military ineffectiveness (and the military weakness of its remaining members), the changing priorities of the US, and the possibility that Russia might indulge in further revisionist adventures in Eastern Europe?

Of course, the Audit cannot answer these questions, either at the global or European levels, for it does not – and cannot – account for the changed circumstances in which the major powers might operate. Nor can it measure the way in which the major powers develop strategies to transform their geopolitical capabilities into national power. What it can do – and does do – is provide an instrument to help to explain what capabilities the major powers, both “established” and “emerging”, might have access to as they seek to shape the world around them, or respond to the strategies of other powers.

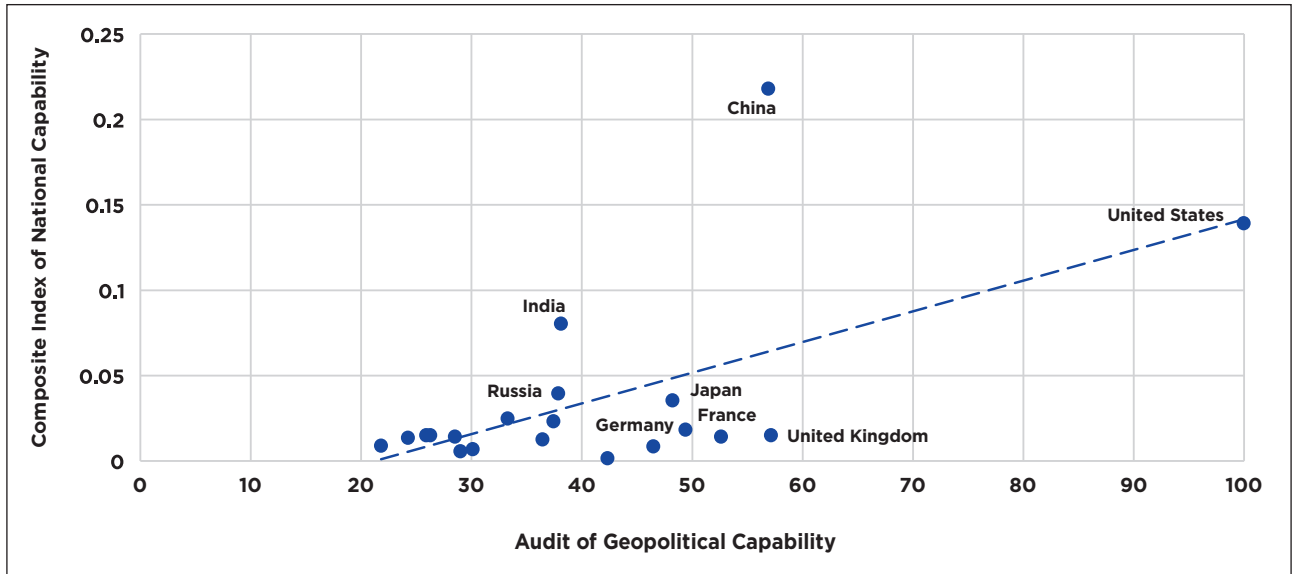
To close, the Audit provides a useful instrument to assess the geopolitical capability of the twenty major powers. In future years, it could be used to track and monitor the performance of the major powers, allowing for comparison across and between four essential attributes of national capability. It also offers a device to understand how the “established” and “emerging” powers are likely to wax and wane in relation to one another, how some countries can compensate for their comparatively-limited national bases by developing deep and integrated national structures, and how these structures can be used to generate national instruments with which to pursue national interests.

Appendix

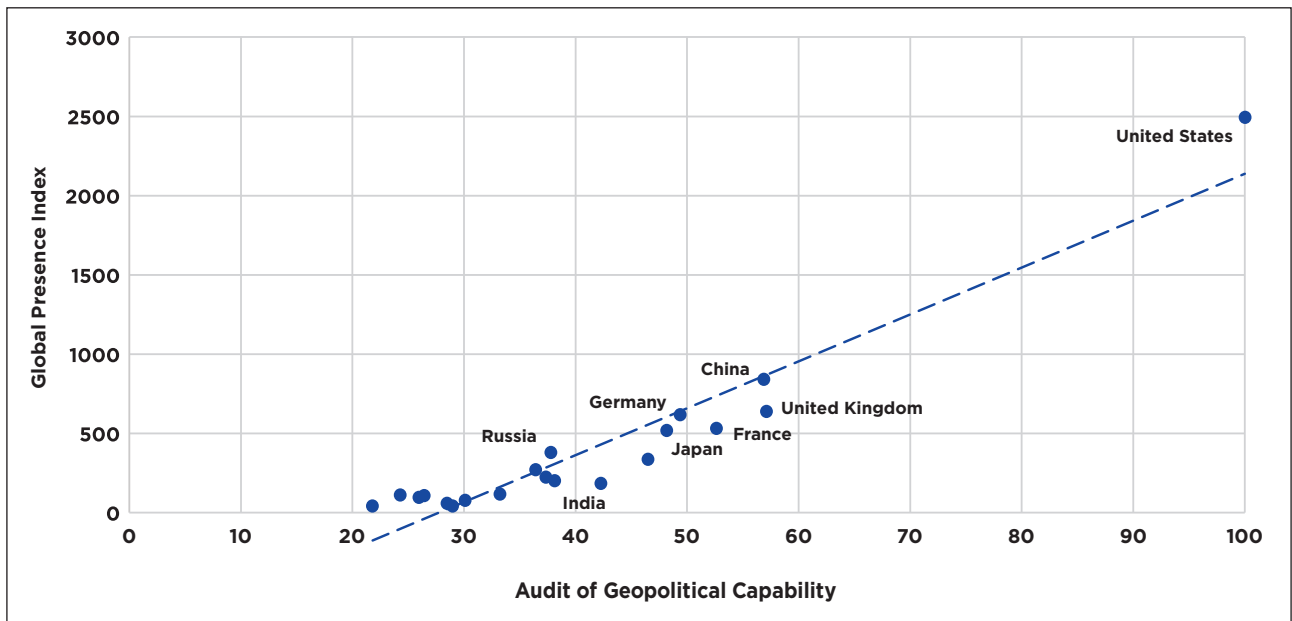
A. Comparison of different capability and power indices

Charts A.1, A.2 and A.3 depict each of the major established indices (outlined in Section 1) for measuring or ascertaining the “national capability”, “global presence” and “soft power” of the major powers in relation to the Audit of Geopolitical Capability. These are included to show the similarities and differences between those indices and the Audit.

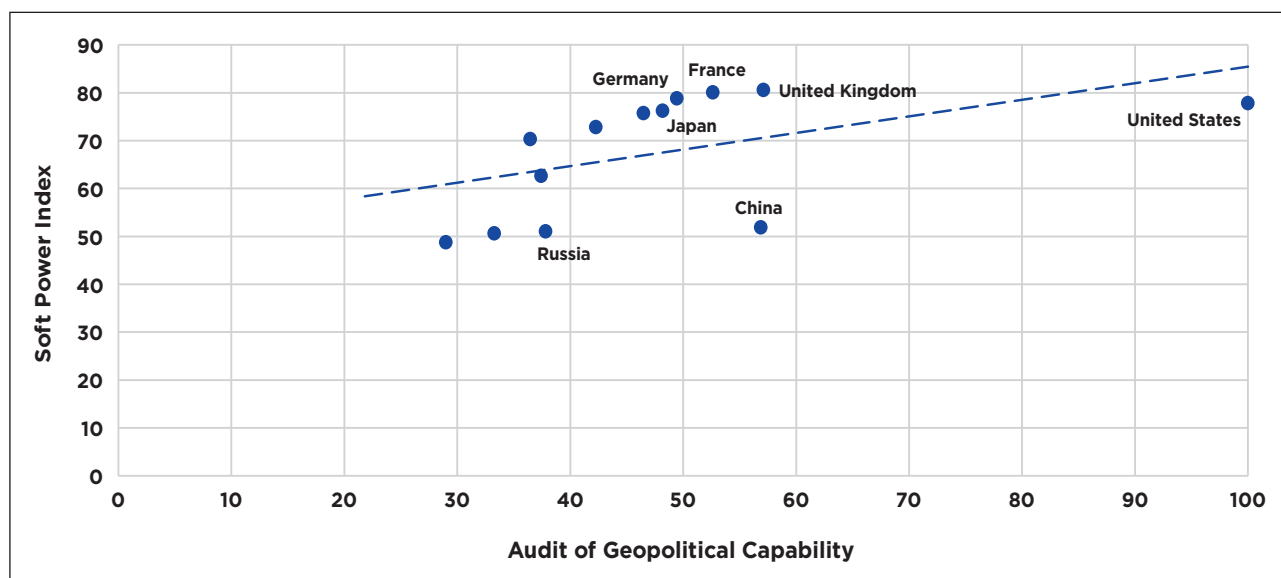
A.1 The Composite Index of National Capability compared to the Audit of Geopolitical Capability



A.2 The Global Presence Index compared to the Audit of Geopolitical Capability



A.3 The Soft Power Index compared to the Audit of Geopolitical Capability



B. Attributes, pillars, indicators and components

1. NATIONAL BASE (Weight: 20%)

Indicator	Components	Source	Date
National wealth	Net wealth (total, US\$)	Credit Suisse	2018
Population structure	Population size (total)	World Bank	2017
	Median age (years)	CIA World Factbook	2017
National spread	Land area (total, km ²)	CIA World Factbook	2018
	Exclusive Economic Zone (total, km ²)	Marine Regions	2018
Resource self-sufficiency	Energy self-sufficiency (percentage)	International Energy Authority	2016
	Food energy supply adequacy (percentage)	Food and Agriculture Organisation	2017

2. NATIONAL STRUCTURE (Weight: 40%)

2.1 Economic clout (Weight: 15%)

Indicator	Components	Source	Date
National income	Gross National Income (total, US\$, Atlas method)	World Bank	2017
Corporate size	Forbes 2000 companies (total)	Forbes	2018
	Forbes 2000 companies (average position)	Forbes	2018
Financial control	Global rank of the capital/primate city (score)	Institute for Urban Strategies	2018
	Foreign Direct Investment (Total net outflows, US\$)	World Bank	2017
Commercial reach	Merchandise and service exports (total, US\$)	United Nations Conference on Trade and Development	2017
Gravitational pull	Net positive migration (total, 2017-2013)	World Bank	2017

2.2. Technological Prowess (Weight: 10%)			
Indicator	Components	Source	Date
Knowledge base	Education Index (score)	United Nations Education, Science and Culture Organisation	2017
	Top 200 universities (total number and average position)	Times Higher Education	2018
	Number of think tanks (total)	Think Tanks and Civil Societies Programme	2018
Infrastructure	Level of urbanisation (percentage)	CIA World Factbook	2018
	Transport system (Railway density (railways per km ²), Merchant marine (gross tonnage, total), Commercial air system (passengers carried by national carriers, total))	CIA World Factbook, United Nations Conference on Trade and Development, World Bank	2018-2017
	Access to communication (score)	International Telecommunication Union	2017
	Usage of communication (score)	International Telecommunication Union	2017
Research outlay	Research and Development spending (total, US\$)	United Nations Education, Scientific and Cultural Organisation	2016
Innovativeness	Nobel Prizes received in chemistry, physics, medicine and physiology (total, 2017-2013)	Nobel Foundation	2017-2013
	Patent applications (average, 2016-2012)	World Intellectual Property Organisation	2016-2012
	Trademark applications (average, 2016-2012)	World Intellectual Property Organisation	2016-2012
Health	Healthy life expectancy (years)	World Health Organisation	2016

2.3 Cultural Prestige (Weight: 15%)			
Indicator	Components	Source	Date
Freedom to create	Political freedom (score)	Freedom House	2018
	Internet freedom (score)	Freedom House	2018
	Press freedom (score)	Freedom House	2018
Discursive dominance	Top 52 Publishers (total revenue, US\$)	<i>Publisher's Weekly</i>	2018
	Top 10 million websites using the official or national language (total)	W3Techs	2018
	International organisations using the official or national language (total)	<i>Yearbook of International Associations 2018/2019</i>	2018
National appeal	Overseas tourist arrivals (total)	World Bank	2018
	International students from overseas in tertiary educational institutions (total)	United Nations Education, Science and Cultural Organisation	2018
Sporting attainment	FIFA Ranking (score)	FIFA/Coca-Cola World Ranking	2018
	Olympic medals (Gold, Silver, Bronze) 2016 (score)	British Broadcasting Cooperation	2018
Economic allure	Top 100 Brands (total value, US\$)	Interbrand	2018

3. NATIONAL INSTRUMENTS (Weight 30%)			
3.1 Diplomatic Leverage (Weight: 0.15)			
Indicator	Components	Source	Date
Overseas missions	Overseas resident embassies (and high commissions) (total)	National diplomatic services	2017
Diplomatic centrality	Membership of the UN Security Council (score, 2018-2014)	United Nations Security Council	2018-2014
Organisational penetration	Membership of intergovernmental organisations (total)	<i>Yearbook of International Associations 2018/2019</i>	2018
Developmental capacity	Official Development Assistance (2017-2013, average, US\$)	Organisation for Economic Cooperation and Development	2017-2013
Passport power	Countries to which a citizen can travel visa-free (total)	Henley and Partners	2018
3.2 Military strength (Weight: 15%)			
Indicator	Components	Source	Date
Defence spending	Defence spending (2017-2013, average, US\$)	<i>The Military Balance 2018, 2017, 2016, 2015, 2014</i>	2018-2013
Nuclear arsenal	Deployed warheads (total)	Federation of American Scientists	2018
	Reserve warheads (total)	Federation of American Scientists	2018
	Second-strike capability (score)	Various	2018
	Striking range (score)	Various	2018
	Delivery platforms (score)	Various	2018
	Nuclear reputation (years)	Various	2018
Projection forces	Major combatants (total displacement, tonnes)	<i>Jane's Fighting Ships 2018-2019</i>	2018
	Large auxiliary vessels (total displacement, tonnes)	<i>Jane's Fighting Ships 2018-2019</i>	2018
	Average displacement (tonnes)	<i>Jane's Fighting Ships 2018-2019</i>	2018
Military-industrial base	Top 100 Arms and Military Service Companies (total revenue, US\$)	Stockholm International Peace Research Institute	2016
Global reach	Total overseas military facilities by type (score)	Various	2018
	Spread of overseas military facilities (score)	Various	2018
4. NATIONAL RESOLVE (Weight: 10%)			
Indicator	Components	Source	Date
Government efficacy	Effectiveness (score)	World Bank	2018
	Stability (score)	World Bank	2018
	Rule of law (score)	World Bank	2018
	Lack of corruption (score)	World Bank	2018
Economic resolve	Outward Foreign Direct Investment (% of GDP)	World Bank	2018
Strategic resolve	Defence spending (% of GDP)	<i>The Military Balance 2018</i>	2018
Altruistic resolve	Official Development Assistance spending (% of GNI)	Organisation for Economic Cooperation and Development	2018

C. Table of indicators by weight

Indicator	Weighting (%)
National wealth	10
National income	10
Freedom to create	10
Government efficacy	7
Population structure	6
Overseas missions	6
Defence spending	6
Knowledge base	4
National spread	3
Infrastructure	3
Diplomatic centrality	3
Organisational penetration	3
Nuclear arsenal	3
Projection forces	3
Corporate size	2
Discursive dominance	2
Developmental capacity	1.5
Passport power	1.5
Military-industrial base	1.5
Global reach	1.5
Resource self-sufficiency	1
Financial control	1
Commercial reach	1
Gravitational pull	1
Research outlay	1
Innovativeness	1
Health	1
National appeal	1
Sporting attainment	1
Economic allure	1
Economic resolve	1
Strategic resolve	1
Altruistic resolve	1
Total	100

D. Statement on Overseas Territories

Several of the major powers hold overseas territories, including:⁴⁰

Overseas territories of Australia		
Ashmore and Cartier Islands	Christmas Island	Cocos Islands
Coral Sea Islands	Heard and McDonald Islands	Macquarie Island (Tasmania)
Norfolk Island		
Overseas territories of Brazil		
Trinidad		
Overseas territories of China		
Hong Kong	Macao	
Overseas territories of France		
Clipperton Island	French Guiana	French Polynesia
Guadeloupe	Martinique	Mayotte (and minor islands)
New Caledonia	Reunion (and Tromelin)	Saint Barthelemy
Saint Martin	Saint Pierre and Miquelon	Southern Islands
Wallis and Fortuna		
Overseas territories of India		
Nicobar Islands		
Overseas territories of South Africa		
Prince Edward Islands		
Overseas territories of the United Kingdom		
Anguilla	Bermuda	British Indian Ocean Territory
British Virgin Islands	Cayman Islands	Falkland Islands
Gibraltar	Montserrat	Pitcairn
South Georgia and the South Sandwich Islands	Sovereign Bases (Cyprus)	St Helena, Ascension and Tristan da Cunha
Turks and Caicos Islands		
Overseas territories of the United States		
American Samoa	Guam	Howland Island
Jarvis Island	Johnston Atoll	Midway Atoll
Navassa Island	Northern Mariana Islands	Palmyra Atoll/Kingman Reef
Puerto Rico	United States Virgin Islands	Wake Island

However, in most cases, the data is simply lacking or incomplete for each overseas territory for each component, meaning that they cannot be included. In any case, with few exceptions, the major powers' overseas territories are so small that they would be largely inconsequential if added to each country's overall performance.

That said, in those cases where the data is largely available or where it makes specific sense to include the overseas territories – for example, in “niche” areas where they add significant value

⁴⁰ Any sovereign territories in Antarctica are excluded in all cases.

to the major power’s geopolitical capability – they have been included. The table below explains where they have been included, and why:

Component	Territories included	Notes
Net wealth (total, US\$)	China: Hong Kong, Macao	Only sizeable overseas territories have been included in the ranking produced by Credit Suisse, to improve the understanding of the relevant countries’ overall score.
	France: French Guiana, French Polynesia, Guadeloupe, Martinique, New Caledonia, Reunion	
	UK: Bermuda, Cayman Islands	
	US: American Samoa, Guam, Northern Mariana Islands, Puerto Rico, United States Virgin Islands	
Population size (total)	China: Hong Kong, Macao	Only sizeable overseas territories have been included in the ranking produced by the World Bank, to improve the understanding of the relevant countries’ overall score.
	France: French Polynesia, New Caledonia, Saint Martin	
	UK: Bermuda, British Virgin Islands, Cayman Islands, Gibraltar, Turks and Caicos Islands	France already includes overseas departments.
	US: American Samoa, Guam, Northern Mariana Islands, Puerto Rico, United States Virgin Islands	
Land area (total, km²)	Australia: Ashmore and Cartier Islands, Christmas Island, Cocos Islands, Coral Sea Islands, Heard Island and McDonald Island, Norfolk Island	Included to improve the understanding of the relevant countries’ overall score.
	China: Hong Kong, Macao	
	France: Clipperton island, French Polynesia, New Caledonia, Saint Barthelemy, Saint Martin, Saint Pierre and Miquelon, Southern and Antarctic Lands (Crozet Islands, Kerguelen and Amsterdam Island), Wallis and Fortuna	
	UK: Anguilla, Bermuda, British Indian Ocean Territory, British Virgin Islands, Cayman Islands, Falkland Islands, Gibraltar, Montserrat, Pitcairn, South Georgia and the South Sandwich Islands, Sovereign Bases (Cyprus), St. Helena Ascension and Tristan da Cunha, Turks and Caicos Islands	
	US: American Samoa, Guam, Howland Island, Jarvis Island, Johnston Atoll, Midway Atoll, Navassa Island, Northern Mariana Islands, Puerto Rico, United States Virgin Islands, Wake Island	

Component	Territories included	Notes
Exclusive Economic Zone (total, km²)	Australia: Christmas Island, Cocos Islands, Heard Island and McDonald Island, Macquarie Island (Tasmania), Norfolk Island (Ashmore and Cartier Islands and Coral Sea Islands are a part of the Australian Exclusive Economic Zone)	Included to improve the understanding of the relevant countries' overall score.
	Brazil: Trindade	
	France: Clipperton Island, French Guiana, French Polynesia, Guadeloupe, Martinique, Mayotte (Includes Mayotte, Glorioso Islands, Juan de Nova, Basas da India and Europa Island), New Caledonia, Reunion (includes Reunion and Tromelin), Saint Barthelemy, Saint Martin, Saint Pierre and Miquelon, Southern and Antarctic Lands (includes Crozet Islands, Kuergelen and Amstadam Island), Wallis and Fortuna	
	India: Nicobar Islands	
	South Africa: Prince Edward Islands	
	UK: Anguilla, Bermuda, British Indian Ocean Territory, British Virgin Islands, Cayman Islands, Falkland Islands, Gibraltar, Montserrat, Pitcairn, South Georgia and the South Sandwich Islands, Sovereign Bases (Cyprus), St. Helena Ascension and Tristan da Cunha, Turks and Caicos Islands	
	US: Alaska, Hawaii, American Samoa, Guam, Howland Island, Jarvis Island, Johnston Atoll, Navassa Island, Northern Mariana Islands, Palmyra Atoll/Kingman Reef, Puerto Rico, United States Virgin Islands, Wake Island	
Forbes 2000 companies (total)	China: Hong Kong	All Forbes 2000 companies listed in overseas territories for respective countries have been included, to improve the understanding of the relevant countries' overall score.
	UK: Bermuda	
	US: Puerto Rico	
Top 200 universities (total)	China: Hong Kong	All Top 200 Universities listed in overseas territories for respective countries have been included, to improve the understanding of the relevant countries' overall score.
Think tanks (total)	China: Hong Kong	All think tanks listed in overseas territories for respective countries have been included, to improve the understanding of the relevant countries' overall score.
	France: Guadeloupe, Martinique	
	UK: Bermuda	
	US: Puerto Rico	

Component	Territories included	Notes
Merchant marine (gross tonnage, total)	China: Macao, Hong Kong	Only sizeable overseas territories included in the ranking produced by the United Nations Conference on Trade and Development have been included to improve the understanding of the relevant countries' overall score.
	France: French Polynesia, New Caledonia	
	UK: Bermuda, British Virgin Islands, Cayman Islands, Falkland Islands, Gibraltar, Turks and Caicos Islands	
FIFA Ranking (score)	N/A	Due to the UK being divided into four national football teams (England, Scotland, Wales, Northern Ireland) the highest ranked team (England) has been used to represent the British score.
Olympic medals (score)	US: Puerto Rico	All medal winners listed in overseas territories for respective countries have been included, to improve understanding of the relevant countries' overall score.

E. Omissions of data

The following tables provide an overview of the data omissions: Table 1 outlines “legitimate” omissions, and Table 2 outlines “illegitimate” omissions.

Table 1: Legitimate Omissions		
Indicator/Component	Country	Reason
Financial control Capital/primate city	Nigeria	Capital/primate cities not large enough to feature on the Institute for Urban Strategies’ Global Power City Index.
	Saudi Arabia	
Discursive dominance Top 54 publishers (total revenue, US\$)	Argentina	National publishers are not big enough to feature alongside the world’s Top 54 Publishers, as specified by <i>Publisher’s Weekly</i> .
	Australia	
	China	
	India	
	Indonesia	
	Mexico	
	Nigeria	
	Saudi Arabia	
	South Africa	
	Turkey	
Economic allure Top 100 brands (total value, US\$)	Argentina	National brands are not big enough to feature alongside the world’s Top 100 brands, as specified by Interbrand.
	Australia	
	Brazil	
	Canada	
	India	
	Indonesia	
	Mexico	
	Nigeria	
	Saudi Arabia	
	South Africa	
	Turkey	

Developmental capacity Official Development Assistance (2017-2013, average, US\$)	Argentina	Countries are not members of the OECD's Development Assistance Committee, meaning that they do not provide ODA. Although not members of the DAC, the OECD provides full ODA data for Turkey and Russia, which are included.
	Brazil	
	China	
	India	
	Indonesia	
	Mexico	
	Nigeria	
	Saudi Arabia	
	South Africa	
Military-industrial base Top 100 Arms and Military Service Companies (total revenue, US\$)	Argentina	Countries do not contain any of the world's Top 100 Arms and Military Service Companies, as specified by the Stockholm International Peace Research Institute (SIPRI). Although not included, China is considered a "special case" and is subsequently included in "illegitimate omissions".
	Indonesia	
	Mexico	
	Nigeria	
	Saudi Arabia	
	South Africa	
Knowledge base Top 200 universities (total number and average position)	Argentina	Countries do not contain any of the world's Top 200 Universities, as specified by <i>Times Higher Education</i> .
	Brazil	
	India	
	Indonesia	
	Mexico	
	Nigeria	
	Saudi Arabia	
	Turkey	

Table 2: Illegitimate Omissions		
Indicator	Country	Reason
Military-Industrial base Top 100 Arms and Military Service Companies (Total revenue, US\$)	China	The Stockholm International Peace Research Institute claims that although "several Chinese arms-producing companies are large enough to rank among the SIPRI Top 100", they have been omitted "because of a lack of comparable and sufficiently accurate data." ⁴¹
National appeal International students from overseas in tertiary educational institutions (total)	Nigeria	Data not available.
Research outlay Research and Development spending (total, US\$)	Nigeria	Data not available.

⁴¹ 'SIPRI Arms Industry Database', *Stockholm International Peace Research Institute*, November 2018, available at: <https://www.sipri.org/databases/armsindustry>, last visited: 10 November 2018.

F. Data Tables

F.1 Geopolitical capability of the major powers (scores)

Major Power	National Base	National Structure	Economic Clout	Technological Prowess	Cultural Prestige	National Instruments	Diplomatic Leverage	Military Might	National Resolve	TOTAL SCORE
Argentina	0.0129	0.1394	0.0100	0.0435	0.0858	0.0684	0.0661	0.0023	0.0396	0.2603
Australia	0.0400	0.1934	0.0226	0.0539	0.1169	0.0756	0.0688	0.0069	0.0712	0.3803
Brazil	0.0322	0.1441	0.0212	0.0405	0.0824	0.0925	0.0872	0.0053	0.0301	0.2989
Canada	0.0369	0.2042	0.0283	0.0531	0.1228	0.0943	0.0904	0.0039	0.0824	0.4178
China	0.1320	0.1901	0.0921	0.0713	0.0267	0.1503	0.1169	0.0334	0.0389	0.5112
France	0.0385	0.1999	0.0348	0.0565	0.1086	0.1656	0.1327	0.0329	0.0691	0.4731
Germany	0.0241	0.2235	0.0469	0.0635	0.1131	0.1184	0.1101	0.0083	0.0781	0.4442
India	0.0755	0.1378	0.0248	0.0298	0.0832	0.0945	0.0732	0.0213	0.0349	0.3426
Indonesia	0.0314	0.1182	0.0192	0.0314	0.0675	0.0737	0.0713	0.0024	0.0330	0.2563
Italy	0.0197	0.1723	0.0255	0.0485	0.0984	0.0846	0.0792	0.0054	0.0510	0.3277
Japan	0.0407	0.2185	0.0491	0.0666	0.1028	0.0974	0.0880	0.0093	0.0768	0.4333
Mexico	0.0203	0.1237	0.0183	0.0373	0.0682	0.0659	0.0645	0.0014	0.0237	0.2337
Nigeria	0.0163	0.1066	0.0039	0.0233	0.0794	0.0626	0.0616	0.0010	0.0107	0.1961
Russia	0.0464	0.1027	0.0226	0.0427	0.0374	0.1627	0.1186	0.0442	0.0286	0.3404
Saudi Arabia	0.0150	0.0802	0.0147	0.0408	0.0247	0.0730	0.0642	0.0088	0.0500	0.2182
South Africa	0.0130	0.1489	0.0125	0.0368	0.0996	0.0651	0.0631	0.0020	0.0435	0.2706
South Korea	0.0150	0.1687	0.0238	0.0570	0.0879	0.0910	0.0854	0.0056	0.0617	0.3364
Turkey	0.0116	0.1000	0.0203	0.0386	0.0412	0.0853	0.0823	0.0030	0.0401	0.2370
United Kingdom	0.0333	0.2287	0.0370	0.0661	0.1256	0.1706	0.1337	0.0369	0.0810	0.5135
United States	0.1494	0.3858	0.1490	0.0964	0.1405	0.2943	0.1453	0.1490	0.0696	0.8991

F.2 Geopolitical capability of the major powers (relative scores)

Major Power	National Base	National Structure	Economic Clout	Technological Prowess	Cultural Prestige	National Instruments	Diplomatic Leverage	Military Might	National Resolve	TOTAL SCORE
Argentina	8.64	36.13	6.73	45.18	61.10	23.23	45.45	1.56	48.06	28.95
Australia	26.81	50.13	15.15	55.93	83.25	25.70	47.33	4.61	86.40	42.30
Brazil	21.57	37.35	14.23	42.00	58.66	31.42	60.00	3.55	36.55	33.24
Canada	24.70	52.92	18.98	55.06	87.45	32.05	62.20	2.64	100	46.47
China	88.35	49.27	61.81	74.01	19.00	51.07	80.42	22.44	47.14	56.86
France	25.75	51.82	23.36	58.67	77.30	56.25	91.30	22.07	83.87	52.62
Germany	16.13	57.94	31.52	65.85	80.54	40.24	75.75	5.60	94.76	49.40
India	50.52	35.72	16.68	30.89	59.22	32.10	50.35	14.29	42.28	38.10
Indonesia	21.01	30.63	12.91	32.61	48.06	25.04	49.06	1.61	40.08	28.51
Italy	13.19	44.67	17.10	50.33	70.02	28.75	54.49	3.63	61.91	36.45
Japan	27.23	56.63	32.96	69.08	73.20	33.08	60.58	6.26	93.13	48.19
Mexico	13.61	32.07	12.26	38.71	48.53	22.38	44.35	0.95	28.78	25.99
Nigeria	10.91	27.62	2.64	24.13	56.49	21.27	42.40	0.66	12.93	21.81
Russia	31.05	43.73	15.19	44.33	26.60	55.30	81.59	29.64	34.64	37.86
Saudi Arabia	10.07	26.63	9.89	42.29	17.57	24.81	44.20	5.90	60.61	24.27
South Africa	8.71	20.78	8.42	38.17	70.89	22.13	43.44	1.34	52.81	30.09
South Korea	10.03	39.60	15.98	59.12	62.59	30.93	58.79	3.75	74.86	37.42
Turkey	7.74	25.92	13.61	40.01	29.30	28.99	56.64	2.03	48.69	26.36
United Kingdom	22.26	59.28	24.84	68.63	89.39	57.98	92.02	24.76	98.20	57.11
United States	100	100	100	100	100	100	100	100	84.47	100

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