

Soft power superpowers

Global trends in cultural engagement and influence

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Foreword

Many states around the world are waking up to the importance of soft power to success in the 21st century and, as this report sets out, are investing enormous sums to increase their international reach and influence. Russia, China and other countries are spending billions on international broadcasting and cultural institutions. In today's information age, they recognise that leading the global conversation and having deep cultural and educational connections around the world matters more than ever to their security, prosperity and influence – that 'winning the story' is as important as success in more traditional hard power theatres.

Soft power rarely receives the attention afforded to hard power. That is understandable – there is no soft power equivalent to NATO, the G20 or the Bretton Woods institutions. It is by its nature abstract and intangible, its impact subtle and apparent only over the long term. Yet it is absolutely essential to our international success, not least in helping to ensure a success of Brexit.

Soft power builds trust, a commodity that is in increasingly short supply in an era of growing international instability and the rise of fake news, 'alternative facts' and digital misinformation. Trust is core to forging alliances and to reaching agreements between nations. Maintaining trust between the UK and our European neighbours is a necessity to safeguard prosperity on both sides of the English Channel. Trust is also essential to realising the opportunities Brexit presents for the agreement of new trade deals and deepened relationships with fast-growing economies in South and East Asia, Sub-Saharan Africa and the Americas. Soft power enhances our attractiveness as a partner, trust makes striking a deal easier.

The UK has a strong national brand and powerful institutions, including the BBC World Service and the British Council. We are, currently, a 'soft power superpower'. Yet that status is under threat. Severe financial pressures on the Foreign and Commonwealth Office have undermined the reach and capability of the diplomatic network, and has affected the work of the BBC World Service and the British Council at the very time other countries are seeking to increase their global influence and expand their international networks. These institutions are essential to the national interest.

By learning from the experiences of other leading soft powers and making the necessary investment and policy changes, we can retain and secure the UK's influence and ensure that we remain one of the most connected and influential nations of the 21st Century. To not do so would be to place our international influence, prosperity and security in jeopardy.



John Baron MP
Chair
British Council All-Party
Parliamentary Group

Executive summary

The UK's soft power, its global influence and attractiveness, is crucial to the country's international success. It underpins our security and prosperity both directly by fostering trust and increasing the UK's ability to shape global events, attracting investors, tourists and international students to the UK but also by serving as a multiplying factor to the UK's hard economic and military capacity. While over the past century the UK has seen its economic and military power decline relative to others, it is universally recognised as a leading soft power. It has even been described as a 'soft power superpower', coming first in the 2018 Portland Communications Soft Power 30 index ahead of other leading soft powers like France, Germany and the US. But just as the age of the British Empire has been consigned to the history books, the UK's current status as a soft power superpower is no guarantee of future success in what is an ever more complex and fast changing world.

A state's soft power can wax and wane over time, its influence can be strengthened or undermined by the words and deeds of governments. Hard power interventions can destroy in days and hours the trust, confidence and understanding that may have accumulated over years from a country's soft power. For example, military interventions in Iraq and Libya have harmed the standing of the UK and other Western states in the Middle East and North Africa, but so too has perceived inaction over Syria. Domestic policy can also undermine soft power, the UK's visa regulations can act as a barrier, undermining its ability to engage the leaders of tomorrow and to build the networks on which UK influence depends. But perhaps the greatest threat to the UK's soft power is complacency, hubris and neglect. Other countries are increasingly recognising the importance of soft power to the realisation of their global ambitions and investing heavily to increase their reach and impact, to tell their stories and shape the international agenda. Russia and China in particular have been massively expanding their investment in the traditional stalwarts of soft power projection – international broadcasting and international cultural institutes and programmes.

This report sets out to explore the major global trends in soft power today. For example, in the last five years alone China's network of Confucius Institutes has grown from 320 to 507. It is now by far the largest of the international cultural institutes. The network of the Russkiy Mir Foundation has doubled to 171 centres from just 82 in 2013. Other nations in Asia such as Japan and South Korea are also expanding their investment and activity in these areas. In contrast, the cultural institutes of European nations are largely static or reducing their global footprint.

The British Council office network for example has by contrast shrunk by ten per cent over the same period.

The UK needs to be vigilant and take steps to protect and grow its soft power or face losing ground to rising soft powers. And even though it is perhaps the gold standard against which rivals and allies alike compare themselves, the UK itself has much to learn from other states that are developing their soft power assets. Germany's investment in scholarships and outward student mobility is giving it a real edge in growing its appeal in high-growth export markets in Africa and East Asia. Brazil is developing strong socio-cultural links with other lusophone countries that are in turn supporting the expansion of economic and security links in a model with potential lessons for a renewal of the UK's relationship with the Commonwealth.

Brexit has potentially significant implications for the UK's soft power. It has already had a negative impact on perceptions of the UK in other European states which if left unaddressed will have a long-term cost in terms of trust, influence and economic opportunities. The 'wrong' Brexit, a Brexit that is closed and insular rather than outward looking and confident will send out a signal to the world at large that the UK is in retreat from the global stage. Yet Brexit presents opportunities as well as challenges. The UK's soft power has always depended in large part on perceptions of the UK as a benevolent global force. It has generally been perceived as acting for the common good rather than just out of narrow self-interest, as exemplified by the UK's response to the Ebola outbreak in West Africa, the UK aid programme and the work of the BBC World Service, not to mention the British Council. Other states have been willing to give credence to the UK's point of view, to listen to and even follow the UK's lead on key global challenges because it is trusted and recognised as a leading proponent of the rules-based international system. If the UK steps back from that stance it will lose influence and become less attractive internationally which will have very real costs, e.g. from falling flows of Foreign Direct Investment into the UK.

To maintain its leading position among the soft power superpowers, the UK needs an 'open Brexit', one that embraces an ambitious vision and strategy for UK soft power, backed by sufficient investment; a continued commitment to multilateral co-operation and development; and a renewed investment in the diplomatic network. Becoming a truly global Britain of this kind can enhance rather than undermine the UK's global influence, security and prosperity after the 29 March 2019.

Introduction

The UK stands on the edge of a new era. The decisions made in the coming months will set the UK's trajectory for years to come with profound implications for the country's future prosperity and security. At the time of writing the formal end of the UK's membership of the European Union is just a few months away and the clock is ticking.

The debate on Brexit has produced much heat and smoke but precious little light. There has so far been limited measured reflection on the UK's future place in the world. Brexit forces the UK to think more broadly about what it wants to be in this new era. While they may not entirely agree on the details, for France, Germany and our other European partners and allies, the path ahead remains that set out in the Solemn Declaration on European Union of 1983, i.e. 'ever closer union among the peoples and Member States of the European Community'. Brexit means that the UK must forge a new path, to define a future for itself.

The UK joined the forerunner of the EU as a country still adjusting to the loss of Empire and great power status, humbled by having to go to the International Monetary Fund (IMF) for a bailout, a country unsure of its future place in the world. Membership of the European Union gave the UK a defined regional and global role and a direction of travel, if not a clear destination. As it leaves the EU the future is once again uncertain.

The UK today is a very different country and faces a dramatically changed global environment from that of 1973. The UK now faces an especially important set of choices. What international role does the UK want to play in this new age? How should it re-calibrate its foreign policy? What are the best ways of securing the global relationships the UK will need for its future prosperity, security and influence? The Prime Minister has set out a vision for a global Britain but what should this really look like and what might this entail if we are to keep pace with the rising levels of international engagement of many other nations, especially the fast-growing economies in Asia, Russia and the rising powers in the Global South?

Soft power will be crucial to the UK's success as it seeks to both renew partnerships in Europe and energise relationships with old allies and emerging markets in the wider world. The UK is regarded as a 'soft power superpower', the world leader in soft power according to some commentators and league tables.

But current success should not lead to hubris; other countries are investing heavily to grow their own influence, learning lessons from the UK and other leading soft powers and developing their own novel approaches to foster their reputation and global connections.

This paper aims to inform debate within the UK and the thinking in Whitehall, Westminster, the devolved administrations and the other key partners that will determine the UK's future path. It does this by presenting some insight into the differing approaches to and investment in the generation of soft power among seven G20 states – Brazil, China, France, Germany, Russia, South Korea and the US – as well as reflecting on the approach of the UK itself. These countries are key partners and competitors for the UK in trade and influence globally and offer potential lessons that will be important to the development of the UK's post-Brexit soft power strategy.

The focus in this report is very much on the soft power 'assets' of these states and the way these are being developed, so only passing references are made to hard power and wider foreign policy. However, there has always been an indivisible link between hard and soft power. It is no accident that the world's leading soft powers are also the world's most important economic and military powers.

How a state uses its hard power also has implications for its soft power – militarism and aggression have in the past been shown to undermine a state's influence and attractiveness. Leading soft powers succeed by understanding the complex interactions between hard and soft power and acting accordingly, a strategic approach that former US Secretary of State Clinton referred to as smart power.

This report is based on desk research undertaken by the British Council. The report updates and builds upon the British Council's 2013 publication *Influence and Attraction*. *Influence and Attraction* sought to systematically summarise the key soft power activities from a range of nations, mapping rising levels of investment in cultural institutes and international broadcasting, and identifying the most successful models and strategies for building trust and understanding. Much has changed in five years and this new report considers how the global presence and reach of different nations has altered over half a decade of rapid global change.



The Weltzeituhr (World Clock) at Alexanderplatz in Berlin.

The global presence of international cultural institutions

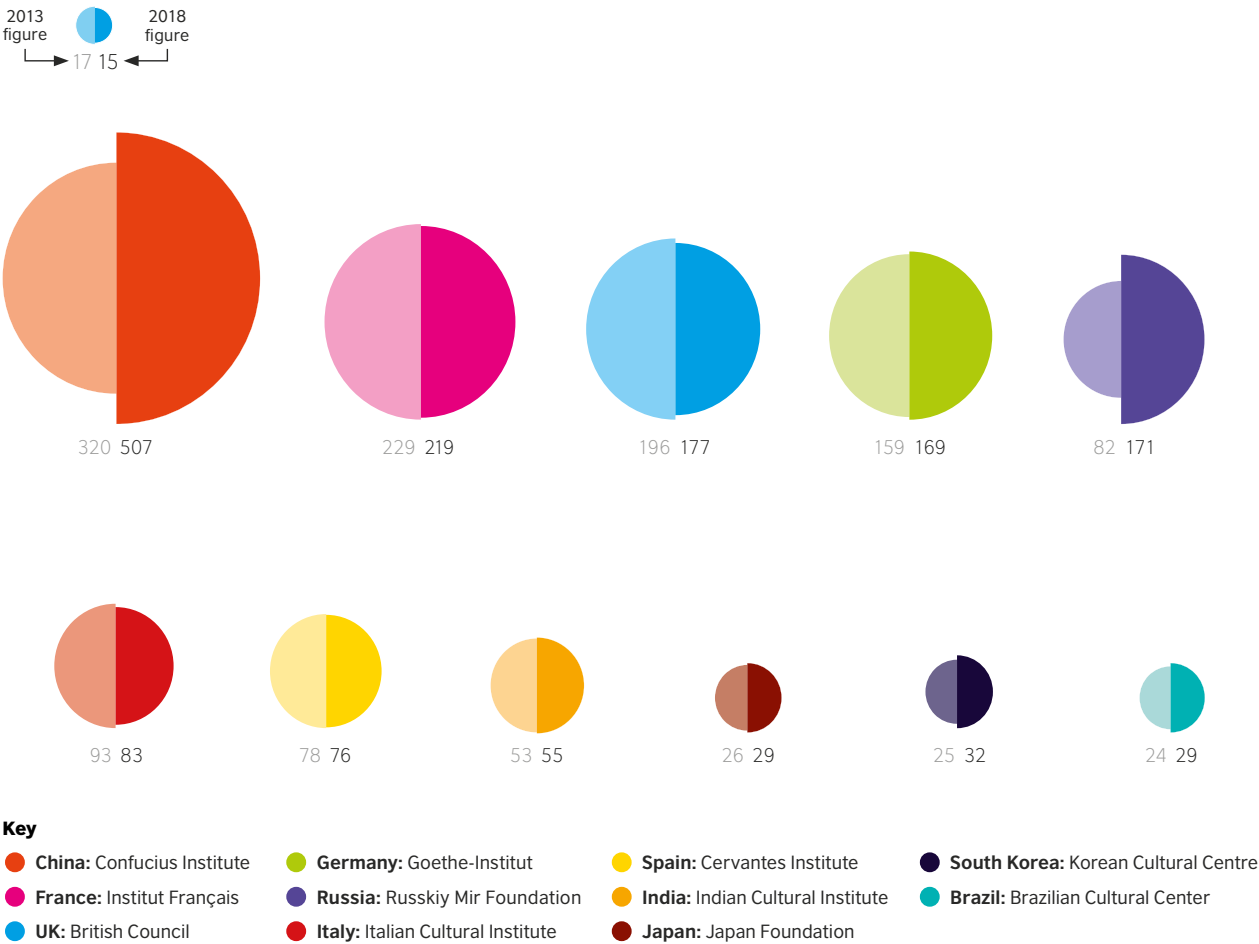
Against the backdrop of global power shifts, growing competition between nations and challenges to the international rules-based system, major changes are taking place in the soft power landscape globally. A number of countries are investing heavily in this area and one of the clearest indicators of this is the expanding presence and impact of states' official bodies for cultural and educational exchange. In this chapter we present the latest data on these crucial networks.

Figure 1 shows the changes in the global presence of the principal cultural institutes of key countries over the past five years. The data shows that China now has by far the largest number of international cultural institutes, with 507 of its Confucius Institutes now in operation, a huge increase from the 320 that were operational in 2013. The second largest nation for its global footprint of cultural institutes is France with 219 Institut Français centres around the world, a modest decrease on the 229 it had in 2013. The UK remains in third place in 2018 with 177 offices of the British Council, down from 196 in 2013. Equally noteworthy is the doubling in the number of operations of the Russkiy Mir Foundation up to 171 from just 82 five years ago. The remainder of the results show less dramatic changes. They include a modest decrease in the size of the Italian Cultural Institute (from 93 offices in 2013 to 83 in 2018) and Cervantes Institute (from 78 offices in 2013 to 76 in 2018). They also show small increases in the global footprint of the Indian Cultural Institute (53 offices in 2013 to 55 in 2018), the Korean Cultural Centre (25 offices in 2013 to 32 in 2018), the Brazilian Cultural Institute (24 in 2013 to 29 in 2018) and the Japan Foundation (26 offices in 2013 to 29 in 2018).

The dramatic expansion in the scale of the operations of both the Confucius Institute and Russkiy Mir Foundation reflects the priority China and Russia respectively have been giving to increasing their global influence and the very significant investments that they are making to achieve this. With the notable exception of the Goethe-Institut, which has increased its offices from 159 to 169, the European cultural office networks are by contrast in decline. Across the West in many nations, public investment in soft power has been either stable or falling. While the focus may be on China and Russia, all of the other Asian and Latin American countries in this study have also shown growth in their global footprint, reflecting growing investment and increasing focus on soft power as a plank of their foreign policy. Funding pressures have seen the British Council office network contract by nearly ten per cent over the same period as the Confucius Institute's global operations have grown by over 50 per cent. The most notable decline in the British Council's operations has been in the developed world with office closures including Finland, Denmark, Sweden, Norway and New York.

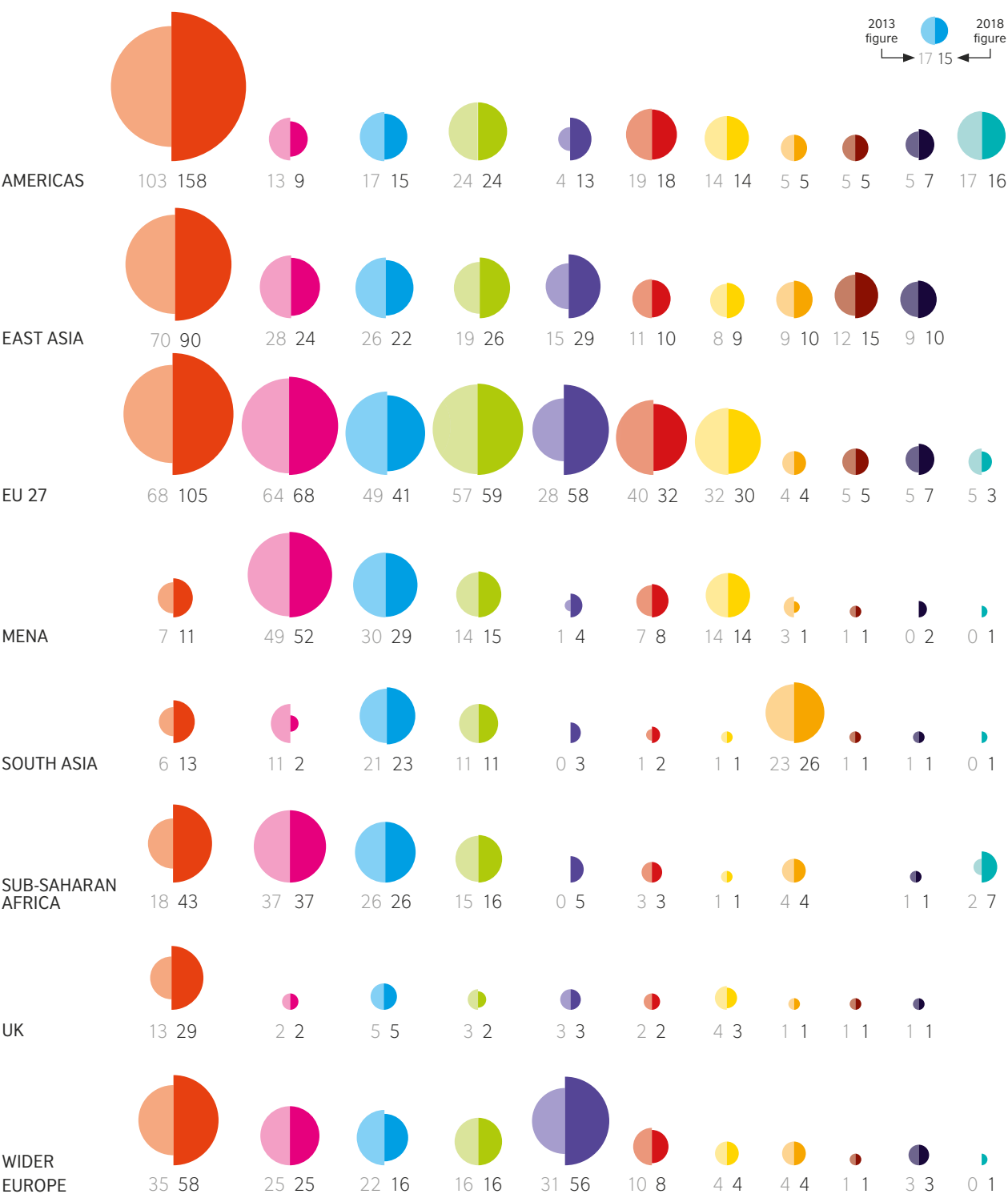
If these trends continue over the next five-year period we may start to witness a major reshaping of the global picture of cultural and soft power networks, with significant long-term implications for influence.

Figure 1: International cultural relations institutions global comparison 2013 and 2018



Source: See page 42

Figure 2: International cultural relations institutions regional comparison 2013 and 2018



Key

● China: Confucius Institute	● Germany: Goethe-Institut	● Spain: Cervantes Institute	● South Korea: Korean Cultural Centre
● France: Institut Français	● Russia: Russkiy Mir Foundation	● India: Indian Cultural Institute	● Brazil: Brazilian Cultural Center
● UK: British Council	● Italy: Italian Cultural Institute	● Japan: Japan Foundation	

Source: See page 42

Figure 2 shows the regional presence of cultural institutes in both 2013 and 2018. This provides a more detailed picture of where investment in cultural institutes is taking place and which parts of the world are being most targeted for cultural connections and influence.

The data shows that the European Union has the greatest concentration of cultural institutes with a total of 412 (or 461 when we include the UK). The Americas comes in second with 284 cultural institutes followed by East Asia (245), Wider Europe – which includes the countries of the Former USSR along with Turkey and Israel – (192), Sub-Saharan Africa (143), the Middle East and North Africa (138), and South Asia (84). The growth in the number of Confucius Institutes in both Sub-Saharan Africa and the Wider Europe region is particularly notable, with the Middle East and North Africa now the only region where any European countries' cultural institutions have a more extensive physical presence than China.

The most notable decline in the British Council's operations has been in the European Union and Wider Europe. This is in contrast to other countries covered by this study which almost all show increases or at least maintenance of their presence across both regions over the past five years. For example, the Russkiy Mir Foundation presence in the European Union has increased from 28 to 58 offices while in Wider Europe the increase is from 31 to 56 offices.

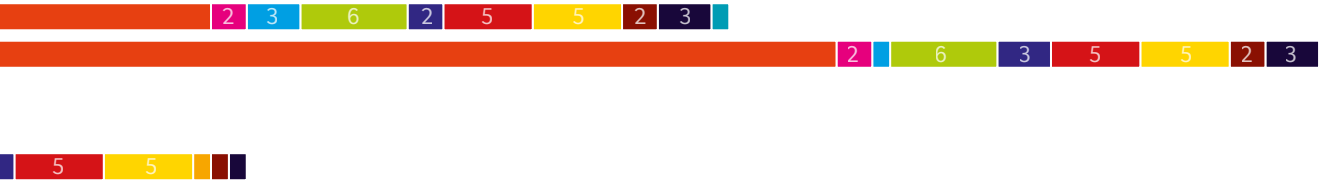
The overall size of the networks of the various cultural relations institutions is only part of the story. Figure 3 shows further details of the relative priorities of different countries with the expansion of the Confucius Institute presence in the UK and the US especially striking. It is certainly worthy of note for example that of the 284 cultural institutes in the Americas, 107 are Confucius Institutes in the United States. There are now 29 Confucius Institutes in the UK, more than double the 13 recorded in 2013. This is not only a reflection of the relative importance of the US and UK to China. Confucius Institutes are predominantly campus-based and so can engage not only domestic students but also very large numbers of international students that attend US and UK universities.

The data in these charts gives only a partial picture, as will be explained in more detail in the next section of this report. Germany for example has a myriad of state agencies that operate in the soft power space of which the Goethe-Institut is just one. It is also worth considering that while the raw number of offices in any particular network can be impressive they can also be deceptive – some of these operations are modest in size with only very few staff and limited scope for public engagement.

Nevertheless, the data serves as a valuable indicator of the priorities and intent of different countries. It is clear that Russia, China and Germany in particular are placing great import on the potential of cultural connections and institutes for growing international influence.

**There are now
29 Confucius
Institutes in the
UK, more than
double the 13
recorded in 2013.**





Key

- China: Confucius Institute

● France: Institut Français

● UK: British Council

● Germany: Goethe-Institut
- Russia: Russkiy Mir Foundation

● Italy: Italian Cultural Institute

● Spain: Cervantes Institute

● India: Indian Cultural Institute
- Japan: Japan Foundation

● South Korea: Korean Cultural Centre

● Brazil: Brazilian Cultural Center
- (0) Total number of international cultural relations institution offices in country

Source: See page 42

ЧЕМПИОНАТ
МИРА
ПО ФУТБОЛУ
FIFA 2018™
В РОССИИ
14 ИЮНЯ - 15 ИЮЛЯ



FIFA WORLD CUP
RUSSIA 2018



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Leading nations' approaches to soft power

In this section we explore the soft power strategies and assets of seven leading G20 states, highlighting their investment in, and ambitions for, growing their influence, before reviewing the status of the UK itself. The UK is often seen as an exemplar of soft power and is recognised for its large and effective diplomatic network and a strong reputation as a leading contributor to international development. The BBC World Service and the British Council are globally recognised as market leaders in their respective fields; while the global success of the UK's cultural and educational sectors are seen as core to the country's international attractiveness. While other countries often adopt superficially similar models for their soft power activities there are also often profound differences in their approaches. Some states have looked long and hard at the UK model and learned from it to develop their own distinctive and innovative approaches from which the UK in turn can learn.

Brazil

Brazil is Latin America's standout soft power.

It has even been described as the world's first big soft power.¹ Even before the 2014 World Cup or 2016 Olympics, Brazil was attracting significant global attention and not just for football or carnival, Brazil's rise has been peaceful and largely uncontroversial. Along with countries such as Canada and Germany it is generally perceived as a benign actor on the international stage.

Brazil's participation in the wider world is generally welcomed. It is respected both as a relatively stable democracy and for the economic achievements of the Lula years. Brazil draws interest from other states when it comes to creating and exporting innovative ways to alleviate poverty and foster a free society. However, ongoing political and economic instability and concerns over corruption have cast a shadow over Brazil's international aspirations. Global broadcasts of the violent protests ahead of the 2016 Olympics tarnished what should have been a PR success. These factors have undermined what had been a solid programme of public diplomacy and nation branding. However, the longer-term fundamentals remain undeniable. Brazil is the world's eighth largest economy with vast reserves of natural resources. Despite the widely publicised political controversies that have overtaken the country, Brazil continues to score well in the Freedom House rankings – its vibrant civil society sector and free press in particular serving as a counterweight to the corruption in the political class.

Brazil's growing interest in Africa has seen the launch of TV Brasil Internacional with bases in Rio and Maputo broadcasting to the lusophone world. Brazilian football and soap operas are keenly followed by the inhabitants of Portuguese-speaking Africa. Launched in 2010, TV Brasil was initially scheduled to broadcast to 49 African nations with plans then to roll it out to Latin America, North America and Europe. TV Brasil Internacional is only one element in an ambitious programme of international engagement. The Lula and Dilma governments saw significant investment in cultural diplomacy designed to bring Brazil to the world. Part of the Brazilian Ministry of Foreign Affairs, the Itamaraty Cultural Department is organised in five units covering the promotion of: language; culture and cultural exchange; Brazilian cinema, television production and advertising; Brazilian policy and news; international liaison on culture with multilateral bodies; and international education.²

The Itamaraty operates Brazil's Cultural Network. The Network is present in more than 40 countries in all continents but the main foci are lusophone Africa, Brazil's Latin American neighbours and key G20 capitals. It consists of 24 Cultural Centers, five Nuclei of Study and around 40 readerships. The Centers promote the systematic teaching of the Portuguese language as spoken in Brazil; the diffusion of Brazilian literature; the distribution of information material about Brazil; the organisation of exhibitions of visual arts and theatrical performances; the co-edition and distribution of texts by national authors; the diffusion of erudite and popular music; the dissemination of Brazilian cinematography; and other forms of Brazilian cultural expression, such as lectures and seminars.

The Brazilian readers are university professors selected through a public exam to act in foreign universities. During their time abroad, readers teach the Brazilian version of the Portuguese language and also work to promote themes related to cultural manifestations of Brazil. The Itamaraty operates programmes like New Voices of Brazil that promotes new Brazilian music as well as artistic exchanges. In partnership with the Ministry of Education and the Ministry of Science, Technology and Innovation, it delivered the *Ciências sem Fronteiras* (Science Without Borders) programme, that enabled young Brazilians to study at European and American universities, and now manages its successor PRINT. Brazil's ambitions are evident in the numbers – between 2011 and 2016 *Ciências sem Fronteiras* granted more than 100,000 scholarships.

Brazil is the leading member of the Comunidade dos Países de Língua Portuguesa (CPLP), an increasingly integrated community of former colonies and states of the Portuguese Empire. The CPLP arguably has an energy that has been lacking in the more established Commonwealth of Nations. Collectively the membership is the world's fourth largest producer of oil giving impetus to greater co-operation. Discussions between the members exploring deeper political and diplomatic co-operation including in matters of the seas, defence and trade are ongoing. Other non-lusophone states, including other G20 states like Japan, Turkey and Australia, have expressed interest in engagement with the CPLP through associate arrangements and observer status.

1. Financial Times (2013) *Brazil: the first big 'soft' power*. Available online at: <https://www.ft.com/content/37685a5c-7bbd-11e2-95b9-00144feabdc0> [Accessed 31 May 2018].

2. Ministry of Foreign Affairs Brazil (n.d.) *Cultural diplomacy*. Available online at: www.itamaraty.gov.br/en/cultural-diplomacy [Accessed 31 May 2018].

The growing South–South co-operation evident in Brazil’s increasing engagement with its South Atlantic neighbours has passed largely unnoticed in the West. There is a risk of complacency among countries that have long relied on the attractiveness of their advanced economies, culture and values. For the growing economies of the Global South, neighbours and regional powers like Brazil, India and South Africa are often more attractive partners than former colonial powers. The power relationships between states tend to be more equitable, practical and without the risk of the patrician overtones of North–South interactions. While Brazil still has many challenges, its developmental experience is relatable and has much to offer other states looking to grow and diversify. There are valuable lessons to share, a sense of solidarity with other former colonies and the opportunity to enter into mutually beneficial partnerships rather than the donor–suppliant relationship that often characterises North–South relations. Brazil also offers a model of progress that embraces the values of freedom and self-determination that are so important to those that have fought for independence from European colonial powers.

Brazil country profile	
Soft Power 30 ranking:	29
Freedom House ranking:	
Political rights:	2
Civil liberties:	2
Freedom status:	free
Lowy Institute Global Diplomatic rankings total posts:	
221	
GDP per capita:	
\$9,821.4	

Source:
Portland Communications Soft Power 30 (2017) *Brazil*. Available online at: https://softpower30.com/country/brazil/?country_years=2017 [Accessed 31 May 2018].
Freedom House (2018) *Freedom in the World 2018: Table of Country Scores*. Available online at: <https://freedomhouse.org/report/freedom-world-2018-table-country-scores> [Accessed 31 May 2018].
Lowy Global Diplomacy Index (2017) *2017 Country Ranking*. Available online at: https://globaldiplomacyindex.lowyinstitute.org/country_rank.html [Accessed 31 May 2018].
World Bank (2017) GDP per capita: current US\$. Available online at: <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD> [Accessed 31 May 2018].

China

As part of its international strategy, China has been investing enormous sums on soft power, rapidly expanding its global reach and influence.

China sees soft power as crucial to its peaceful rise and to building its vision for a new world order, creating and building a 'community of common destiny'. It has been estimated that China spends about \$US10 billion³ annually on soft power initiatives; by comparison the US State Department budget for public diplomacy stood at \$666 million in 2014 and, as a result of the Trump administration's 30 per cent reduction to the State Department budget, is set to fall below \$550 million in 2018.

Since 2004 China's Ministry of Education has established over 500 government-funded Confucius Institutes in 140 countries, many of which are based in universities with staff employed by the host university. This includes an increase of almost 200 Institutes in the past five years alone. These largely offer language classes, although there is often a broader cultural offer and an increasing focus on specialist areas of study, for example traditional Chinese medicine and sports therapy. China has also set up more than 1,000 Confucius Classrooms and school-based language hubs in foreign schools, providing them with teachers, materials and funding to help younger children learn Mandarin and experience Chinese culture. Students around the world are flocking to learn Mandarin, recognising it as the language of the future, something that should give pause to complacent anglophone societies that think they need no longer bother learning foreign languages.

The focus on the significant growth of the Confucius Institute network risks neglecting other important aspects of Chinese soft power. China is also using its rich culture to reach out to new audiences. The Ministry of Culture has established China Cultural Centres (CCC) in many major capitals in the last 15 years (London being one of the few exceptions). The expanding network of China Cultural Centres supports bilateral cultural exchange and showcases the best of Chinese culture through exhibitions, performances, lectures and library services. However, while the raw numbers of individual Confucius Institutes and CCCs are certainly impressive they are not the whole story – some of China's cultural relations operations, especially those in Africa for example, can be quite modest in scale in comparison to those of leading European cultural relations institutions active across the continent.

In 2010 the Chinese government put on more than 100 Chinese New Year events in cities around the world. In 2017 it sponsored some 2,000 of them in 140 countries to mark the Year of the Chicken, with London's event the largest worldwide.⁴ Chinese culture is permeating around the world, driven by huge (largely private sector) investments in films and creative industries.

China is also using its rich culture to reach out to new audiences.

3. The Council on Foreign Relations (2018) *China's Big Bet on Soft Power*. Available online at: <https://www.cfr.org/backgrounder/chinas-big-bet-soft-power> [Accessed 31 May 2018].

4. The Economist (23 March 2017) *China is spending billions to make the world love it*. Available online at: <https://www.economist.com/china/2017/03/23/china-is-spending-billions-to-make-the-world-love-it> [Accessed 31 May 2018].

This outreach programme is having a real impact in perceptions of China around the world. The Pew Research Center has, for example, found that more than 50 per cent of those aged 18–29 in Nigeria and Ghana enjoy Chinese music, television and films. American and European cultural dominance may be giving way to a more pluralist world with people around the world enjoying a broader cultural diet than in the past.

International students have long been encouraged to study in China, with an increasing focus in recent years on Western students. The country is now a leading destination for overseas study, close on the heels of the UK. Just one example shows the scale of China's investment: launched in 2012, the African Talents Program⁵ trained an estimated 30,000 African professionals in China between 2013 and 2015, with a further 18,000 African trainees benefiting from full scholarships to study at Chinese universities under the arrangement. China has studied what has worked for the US, UK and Germany and is not only targeting the leaders and opinion formers of tomorrow to build its global influence in the years ahead, but now also linking its scholarships to mass education, e.g. for ASEAN nations, or more widely from the Belt and Road Initiative (BRI) nations. The ambition is clear, the BRI covers some 65 countries along the Silk Road Economic Belt that crosses the Eurasian continent from Luoyang to Hamburg and the Maritime Silk Road that stretches from Quanzhou to Rotterdam via the South Asia and MENA regions. The scale of China's offer outrivals that of other schemes. The growing importance of China to other states can be seen in UK and US efforts to encourage more of their own citizens to study in the country through support for programmes like Generation UK and the US's 100,000 Strong campaign (now 1 Million Strong).

Xinhua, the government's main news agency, opened nearly 40 new foreign bureaus between 2009 and 2011, bringing its total to 162. The number of Xinhua correspondents based overseas doubled during that time. In December 2016 the state broadcaster rebranded its international media service, calling it China Global Television Network. The investment in CGTN is specifically aimed to compete with global services such as the BBC, CNN and Al Jazeera. CGTN can be received by more than 85 million viewers in over 100 countries and regions. It includes six channels in five languages, including a 24-hour English language news service and a documentary channel. CGTN makes a distinctive offer in its global news coverage, notably a much greater and more nuanced focus on Africa than that offered by the BBC, CNN and other Asian satellite television news channels. Earlier this year China's foreign language radio services were folded into the mix to create Voice of China. The new combined group will have close to 14,000 staff. Its potential is reflected in the reach of just one of its channels – Radio China International broadcasts in 65 languages, more than any other broadcaster. The emphasis on soft power projection was made explicitly in the announcement of the new arrangements:

*The main duties [of Voice of China] are to publicise the party's theory, line, principles and policies... organise major propaganda reports, organise radio and television creation and production, produce and broadcast radio and television products, guide social hotspots, strengthen and improve public opinion supervision, promote multimedia integration development... and tell the story of China.*⁶

5. CGTN (27 August 2018) *Chinese gov't provides more than 1,450 scholarships to Ethiopians in 2018*. Available online at: https://news.cgtn.com/news/3d3d674d34557a4e79457a6333566d54/share_p.html [Accessed 30 August 2018].

6. Xinhua News Agency (2018) *组建中央广播电视总台，撤销央视、央广等建制_中国政库_澎湃新闻*. Available online at: https://www.thepaper.cn/newsDetail_forward_2036400 [Accessed 31 May 2018].

The investment in activities that increase soft power also includes China's new Ministry of Overseas Aid (with an operational model likely closely aligned to that of DfID); a growing commitment to UN peacekeeping which now includes Chinese troops in international command structures; and a massive programme of overseas investment designed to deliver more balanced economic development for China (and in Chinese eyes, to maintain global economic stability, particularly following the 2008 global financial crisis). The journal *Foreign Affairs*⁷ has set out the unprecedented ambitions of China's investment plans: \$50 billion for the Asian Infrastructure Investment Bank, \$41 billion for the New Development Bank, \$40 billion for the Silk Road Economic Belt and \$25 billion for the Maritime Silk Road. Beijing has also pledged to invest a further \$1.25 trillion worldwide by 2025. Together, these recent pledges by Beijing add up to \$1.41 trillion over a ten-year period. In contrast, the Marshall Plan cost the equivalent of \$103 billion in today's money. China's soft and economic power are increasingly being aligned to match its global ambitions at a scale unlike anything the world has seen before. However, China's approach is not without problems – some states like Sri Lanka have struggled to meet debt repayments on loans provided under Chinese investment programmes.

China's investment and, in recent years, more differentiated approach to soft power, is changing opinions. According to Pew research data, the number of nations in which the US holds higher rates of favourability over China has halved from 2014–17, from 25 to 12. In the past the US had a 12 percentage point lead over China in terms of a global median, but in 2017 that lead has shrunk to just two points. In Africa for example, 72 per cent of Nigerians view China favourably and although in other countries across the continent views vary, China is generally perceived as a trusted partner and role model.⁸ There is growing respect for the Chinese economic miracle and for Chinese advances in science and technology. In Latin America and much of the Middle East again China is viewed positively. China is now Brazil's biggest trade partner and is by far the biggest trade partner for the whole African continent. Good will and trust is not only opening up opportunities for Chinese business, it is translating directly into influence. China is today making very effective use of soft power to build its international influence – especially in places that have recently been neglected by the West.

China country profile

Soft Power 30 ranking:	27
Freedom House ranking:	
Political rights:	7
Civil liberties:	6
Freedom status:	not free
Lowy Institute Global Diplomatic rankings total posts:	268
GDP per capita:	\$8,827.0

Portland Communications Soft Power 30 (2017) *China*. Available online at: https://softpower30.com/country/china/?country_years=2017 [Accessed 31 May 2018].

Freedom House (2018) *Freedom in the World 2018: Table of Country Scores*. Available online at: <https://freedomhouse.org/report/freedom-world-2018-table-country-scores> [Accessed 31 May 2018].

Lowy Global Diplomacy Index (2017) *2017 Country Ranking*. Available online at: https://globaldiplomacyindex.lowyinstitute.org/country_rank.html [Accessed 31 May 2018].

World Bank (2017) GDP per capita: current US\$. Available online at: <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD> [Accessed 31 May 2018].

7. Shambaugh, D (2015) *China's Soft-Power Push*. *Foreign Affairs*. Available online at: <https://www.foreignaffairs.com/articles/china/2015-06-16/china-s-soft-power-push> [Accessed 31 May 2018].

8. Vice, M (2017) *In global popularity contest, U.S. and China – not Russia – vie for first*. Pew Research Center. Available online at: www.pewresearch.org/fact-tank/2017/08/23/in-global-popularity-contest-u-s-and-china-not-russia-vie-for-first/ [Accessed 31 May 2018].

France

France's networks and global presence are perhaps the closest to the UK's in reach and depth.

As new nations have arisen from former colonial holdings, cultural organisations and connections have replaced hard power institutions. There is a strong emphasis on the promotion of a shared francophone cultural identity. Through their global networks the French seek to promote the integrity of French culture and to take a position of leadership across the francophone world.

The meteoric rise of Emmanuel Macron has further enhanced France's influence. The tone of the rhetoric coming out of Paris and the President's evident internationalism and commitment to the 'European project' has won him admirers around the world. The Macron Presidency is heavy in symbols and grand gestures but it is underpinned by a real shift in policy towards international engagement. The new President sees diplomacy and soft power as integral to realising his ambitious agenda. There is renewed interest in the instruments of soft power too as can be seen in the President's speech in Ambassador's Week 2017 which set out the new orthodoxy of French soft power and influence with a particular emphasis on La Francophonie and the role of higher education in building relations with future world leaders.

Macron sees soft power as essential to France's international success. Economic progress will depend on internationalism, influence will come from engagement. If the rhetoric is matched with investment and policy change the coming years could see a significant increase in French influence. Macron's arrival on the scene has already impacted on perceptions; within weeks of the presidential elections France was climbing the soft power league tables, coming top in the 2017 Portland Soft Power 30 report.⁹ France already has that rare advantage – a near universal diplomatic network through which it can engage the peoples with the world, allied with an extensive network of soft power agencies. 'In terms of international reach, France is the best-networked state in the world and is a member of more multi-lateral organisations than any other country'.¹⁰

Founded in Paris in 1883, the Alliance Française promotes the French language internationally. There are more than 800 establishments in 137 countries across five continents. Every year over 500,000 people of all ages attend Alliance Française schools to learn French, and over six million people take part in the cultural activities on offer.¹¹ Each Alliance is managed locally as an independent, not-for-profit organisation. They finance most of their activities out of the fees they charge for their teaching services. Since 2007 the global network has been co-ordinated by the Alliance Française Foundation. The Foundation supports existing and future Alliances and upholds the Alliance Française brand, ensuring the individual establishments operate within certain parameters and standards and offering technical and pedagogical expertise.

France is the most popular country in the world for international tourists with 89 million arrivals in 2017.¹² Tourists flock to Paris for the culture, cuisine, shopping and the romance of the City of Light. The Louvre, the Eiffel Tower and Europe's top tourist destination, Disneyland, are all part of the draw. Gastronomic diplomacy is also part of the mix with Michelin starred chefs in high demand. French culture is essential to France's international attractiveness. The opening of the Louvre Abu Dhabi is the latest example of French cultural diplomacy and reflects a new trend in nation branding. The big French institutions are following the example of luxury brands LVMH and Kering in exporting themselves to the high growth regions of Asia and the Gulf. The Louvre Abu Dhabi will be followed by the Shanghai Pompidou Centre.

Cultural diplomacy is formally the responsibility of the French Ministry of Foreign Affairs which operates the Institut Français, the cultural equivalent of the Alliance Française. The Institut has an extensive global network of cultural centres around the world. The French government has entrusted the Institut with promoting French culture abroad through artistic exchanges in the performing arts, visual arts, architecture, French literature, film, technology and ideas. The Institut organises cultural seasons, festivals and cultural collaborations.

9. Portland Communications Soft Power 30 (2018) *France*. Available online at: <https://softpower30.com/country/france/> [Accessed 31 May 2018].

10. *Ibid.*

11. Ministry of Europe and Foreign Affairs France *France Diplomatie*. Available online at: <https://www.diplomatie.gouv.fr/en/french-foreign-policy/cultural-diplomacy/france-s-overseas-cultural-network/> [Accessed 16 October 2018].

12. Reuters (22 August 2017) *Paris revels in tourism surge, but cautious after Barcelona*. Available online at: <https://www.reuters.com/article/us-france-tourism/paris-revels-in-tourism-surge-but-cautious-after-barcelona-idUSKCN1B21GF> [Accessed 16 October 2018].

As with other European cultural institutions, the emphasis is very much on bilateral cultural exchange whether it is the France–Korea Year, the Paris–New York Tandem or 2018’s France–Israel Year. 2017’s France–Colombia Year typifies the bilateral approach – the first six months saw the French Season in Colombia, followed by the Colombian Season in France in the second half of the year. Much like the British Council, the Institut co-ordinates the French pavilions at major events such as the Venice Biennales for the visual arts and architecture and the São Paulo International Architecture Biennial. The Institut Français is also involved in identifying and promoting art scenes and offers opportunities for developing constructive relationships between professional communities in France and abroad. It also undertakes international development work in the countries the French Government has identified in the Priority Solidarity Zone (ZSP). The Institut supports creativity and local cultural events and agencies and offers opportunities for artists from ZSP countries to gain access to the international arts scene through initiatives like the Bamako Encounters photography biennial, the Danse l’Afrique Danse! dance biennial, the L’Afrique est à la Mode young fashion designers’ contest, and the Luang Prabang Photo Biennial.

Created in 2010, Campus France has some similarities to Germany’s DAAD and EducationUSA. It operates 255 offices and branches in 124 countries and promotes study in France to prospective students.¹³ Unlike the DAAD it does not offer scholarships or grants to students, its role is focused on promotion and facilitation, for example through academic fairs and support for visa applications. The French MFA does offer international scholarships for students like the Eiffel Excellence Scholarships for master’s and PhD students and the Excellence-Major Scholarships. Much like similar British and American schemes the focus is on the policymakers and leaders of the future, ‘the brightest and best’.

France Médias Monde is a holding company owned by the French government that manages the major public French media groups which broadcast or publish internationally. The company’s subsidiaries include radio broadcaster Radio France Internationale (RFI), and television and news broadcaster France 24. RFI broadcasts worldwide in French but also offers services in 13 other languages – English, Cambodian, Chinese, Spanish, Hausa, Mandingo, Kiswahili, Persian, Portuguese, Brazilian Portuguese, Romanian, Russian and Vietnamese. France 24 is a 24-hour international news and current affairs television network that broadcasts in French, Arabic, English and Spanish to 333 million television households in 183 countries around the world. France Médias Monde also has a stake in TV5Monde, the world’s leading French language channel that broadcasts 24 hours a day, seven days a week and is available to more than 318 million households and has 32 million viewers every week in 200 countries and territories.¹⁴

France has long been a smart power, globally engaged, influential and known for a distinct approach to international relations. President Macron’s ambitions, if realised, could successfully position France as a key leader of global opinion.

13. Campus France. Available online at: <https://www.campusfrance.org/en/Campus-France-offices-world> [Accessed 16 October 2018].
14. France Médias Monde (2018) Available online at: <https://www.francemediasmonde.com/> [Accessed 16 October 2018].

France country profile

Soft Power 30 ranking:	2
Freedom House ranking:	
Political rights:	1
Civil liberties:	2
Freedom status:	free
Lowy Institute Global Diplomatic rankings total posts:	266
GDP per capita:	\$38,476.7

Source:
Portland Communications Soft Power 30 (2017) *France*. Available online at: https://softpower30.com/country/france/?country_years=2017 [Accessed 31 May 2018].
Freedom House (2018) *Freedom in the World 2018: Table of Country Scores*. Available online at: <https://freedomhouse.org/report/freedom-world-2018-table-country-scores> [Accessed 31 May 2018].
Lowy Global Diplomacy Index (2017) *2017 Country Ranking*. Available online at: https://globaldiplomacyindex.lowyinstitute.org/country_rank.html [Accessed 31 May 2018].
World Bank (2017) GDP per capita: current US\$. Available online at: <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD> [Accessed 31 May 2018].

The Louvre Abu Dhabi opened in 2017 as part of a 30-year agreement between the city of Abu Dhabi and the French government.



Germany

Ever since the Second World War, German foreign policy has focused on marrying economic growth with soft power.

It is an approach that has resulted in German power being broadly perceived as a positive force. Germany is respected and trusted by many nations, its values and culture are attractive internationally. In awarding it top place in its soft power league table in 2016, Monocle opined that in 'pursuing its ideas, values and aims using diplomatic, cultural and economic tools... by quietly doing the simple things well it is a country that has become a global power and the rest of us can feel comfortable with that'. It also scored highly in the Portland Soft Power 30 this year, coming third globally. Germany's reputation may have been negatively impacted in some southern European countries as a result of the crisis in the eurozone but it retains global potency. Germany makes a very similar offer to the world to that of the UK, France, Sweden and other European states – liberal democratic values, an advanced economy and strengths in innovation, culture and science.

An often reluctant leader on the global stage, in the overseas aid space Germany is taking an increasingly prominent role. It stands alongside the US and UK as one of the top three aid donors. The German approach to international development includes a strong focus on the role of German SMEs, its legendary Mittelstand, in mentoring and partnering with businesses in Sub-Saharan Africa. This is similar to the UK's focus on sharing the economic potential of its social enterprise model but also has the advantages of internationalising German businesses to better operate overseas, giving German firms an edge in developing a presence in emerging markets. This approach also ensures that Germany, like China, is recognised as an economic role model and partner. In this context aid contributes to both Germany's international influence and economic success.

The government's generosity to Syrian refugees has also had a positive impact on perceptions of Germany in many countries. Even if it has antagonised some of its immediate neighbours, the policy has served to demonstrate Germany's sense of a 'shared responsibility for the least developed countries'¹⁵ and reinforced its reputation as a country willing to make sacrifices for the greater good.

Germany invests very significant sums in international cultural institutions. The Goethe-Institut, the DAAD (German Academic Exchange Service), Institut für Auslandsbeziehungen (ifa) and several other bodies facilitate major flows of people and ideas between Germany and the rest of the world. In this sense, the data presented by focusing only on the Goethe-Institut offers only a partial picture of Germany's very extensive international cultural work.

15. Federal Ministry for Economic Cooperation and Development (2017) *Africa and Europe – A new partnership for development, peace and a better future*. Available online at: https://www.bmz.de/en/publications/type_of_publication/information_flyer/information_brochures/Materiale270_africa_marshallplan.pdf [Accessed 31 May 2018].

Germany invests very significant sums in international cultural institutions.

The Goethe-Institut remains Germany's principal international cultural organisation. It operates a growing global network offering German language classes and scholarships to foreign nationals who want to become German teachers. It runs a wide array of cultural programmes. The Goethe-Institut has 3,500 employees and a total revenue of €402 million.¹⁶ It is in many ways similar to the British Council and often works closely with it and the other European cultural relations institutes around the world. The Goethe-Institut has a high degree of independence in its work – a deliberate policy choice by successive German governments to avoid instrumentalising cultural exchange for short-term diplomatic gain – something that has been an important characteristic of the German approach to long-term development of its global cultural influence and relationships.¹⁷

Since it was founded, the DAAD has supported more than two million academics in Germany and abroad. In 2017 its operating budget totalled approximately €522 million and it provided funding to 139,758 people. Funding and scholarships went to 61,528 foreigners and 78,230 Germans. By comparison, according to the answer given on 19 July 2017 by the Foreign and Commonwealth Office to a written Parliamentary Question, the combined total number of international scholarships offered by the UK's Chevening and Marshall schemes in 2016–17 was just 1951.¹⁸ DAAD funding programmes provide scholarships which help finance a semester abroad, doctoral programmes and internships, guest lectureships, visits to information events, and even the establishment of new universities abroad.

ifa is another German institution for international cultural exchange, focusing particularly on the visual arts and international cultural and education policy dialogues. ifa does not have the global footprint of the Goethe-Institut or the resources of the DAAD but serves a crucial role in promoting German soft power by the co-ordination of travelling exhibitions and support for people-to-people dialogue through conferences and other fora.

Deutsche Welle is Germany's international broadcaster offering news and information in 30 languages, including Arabic, Kiswahili, Indonesian, Urdu, Russian, Spanish, German and English. Deutsche Welle received Federal government funding in 2016 of €338 million and reached an audience of some 135 million per week.¹⁹ Deutsche Welle describes itself as 'an indispensable "Voice of Freedom"' and is explicit in what it sees as its mission to tackle fake news and media repression around the world.

16. Goethe-Institut Annual Report 2017/18. Available online at: https://www.goethe.de/resources/files/pdf155/gi_jahrbuch_17_18_web_doppelseiten.pdf [Accessed 17 October 2018].

17. British Council/Goethe-Institut (2018) *Cultural Value Relations in Societies in Transition: A Literature Review*. Available online at: https://www.britishcouncil.org/sites/default/files/lit_review_short_working_paper_final_final.pdf [Accessed 31 May 2018].

18. DAAD *Facts and Figures*. Available online at: <https://www.daad.de/der-daad/zahlen-und-fakten/en/> [Accessed 16 October 2018].

19. DW (2017) *Deutsche Welle Annual Report 2016 and 2017*. Available online at: www.dw.com/en/deutsche-welle-annual-report/a-3530526 [Accessed 31 May 2018].

Under the German model these institutions are funded almost entirely from government grant, this means that their resources and presence can be targeted in line with national priorities rather than where commercial revenues make a presence possible. The importance the German government places in soft power is evidenced by the budgetary increases announced on 28 June 2018 – €35 million per annum for Deutsche Welle and a €33 million increase (to a total of €956 million) for foreign cultural and education policy work, i.e. to share between the Goethe-Institut, DAAD, ifa and the many other German agencies that operate in the soft power space.

The German emphasis on cultural exchange is an essential component of Germany’s soft power programmes. As a result young Germans have been much better at seeking out international opportunities than UK citizens. By studying abroad German leaders and policy thinkers develop a strategic advantage over their UK counterparts by developing an understanding of the local culture, language and practices. That intercultural experience makes international engagement and partnering easier and has given German businesses a real edge in forging international deals and partnerships, most notably in the massive Chinese market (China is Germany’s biggest trading partner).

Germany’s power is smart, even though it lacks the military capabilities of other top tier global powers. Germany has taken the approach of combining hard economic power with the soft power of cultural connections and influence ensuring Germany’s rise has been generally welcomed by the international community, allowing it to gain influence without generating the same resentment and suspicion that can characterise perceptions of powers like the US.

Germany country profile

Soft Power 30 ranking:	3
Freedom House ranking:	
Political rights:	1
Civil liberties:	1
Freedom status:	free
Lowy Institute Global Diplomatic rankings total posts:	224
GDP per capita:	\$44,469.9

Source:
Portland Communications Soft Power 30 (2017) *Germany*. Available online at: https://softpower30.com/country/germany/?country_years=2017 [Accessed 31 May 2018].
Freedom House (2018) *Freedom in the World 2018: Table of Country Scores*. Available online at: <https://freedomhouse.org/report/freedom-world-2018-table-country-scores> [Accessed 31 May 2018].
Lowy Global Diplomacy Index (2017) *2017 Country Ranking*. Available online at: https://globaldiplomacyindex.lowyinstitute.org/country_rank.html [Accessed 31 May 2018].
World Bank (2017) GDP per capita: current US\$. Available online at: <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD> [Accessed 31 May 2018].

Russia

Russia has adopted a complex international strategy drawing on a range of hard and soft power tools to realise its foreign policy objectives.

It sees soft power as an integral part of its national power strategy and can be seen as having been largely successful in its short-term aims of increasing Russian influence internationally. Russia has been able to utilise its extensive soft power assets to forge deeper socio-cultural links with countries in its near-neighbourhood across the former Soviet Union. In addition, its intervention in the Syrian Civil War has been accompanied by diplomatic, economic and socio-cultural efforts across the Middle East resulting in significantly increased Russian influence in the region and the deepening of ties with powers like Iran, Saudi Arabia and Turkey. Hosting expensive global spectacles like the World Cup and the Sochi Winter Olympics is another key element in Russia's strategic approach to soft power – the government sees the expenditure as essential for the projection of a positive image of the country to international audiences. Nevertheless while Russia's standing on the global stage is certainly greater than it was even five years ago, there has been a cost. The Russian approach to power projection has antagonised many Western countries leading to diplomatic tensions and the imposition of sanctions and other measures that have adversely impacted on the Russian economy.

Russia has embraced the digital revolution and Russian international news outlets are increasingly well funded and influential. In countries neighbouring Russia there is a real demand for Russian media, Russian language services are an important source of news. Russian remains the regional lingua franca – the language of commerce, employment and education – for many of the states of the former Soviet Union. Russia's foreign language news services are influential in Eastern Europe and the Balkans with promoted news stories picked up and covered by domestic 24-hour news channels hungry for content. A survey by Ipsos has found that since 2015 RT's weekly audience in 38 of the 100 plus countries where RT broadcasts are available has grown by 36 per cent, from 70 million to 95 million viewers. In the US, RT's weekly television viewership grew by more than 30 per cent, from eight million to 11 million viewers. Latin America showed the greatest growth in viewers of all regions surveyed: the weekly television audience of RT nearly tripled in two years to 17 million viewers. Eleven million people watch RT weekly across 15 countries in the Middle East and North Africa, with its largest weekly audience in Iraq with 2.2 million weekly viewers.²⁰ RT and other Russian state media outlets continue to be viewed with suspicion in many Western states. As a result their direct impact on Western perceptions of Russia is limited. Yet much of the content isn't concerned so much with Russia itself as it is with providing an alternative to domestic narratives. The news stories covered by RT and Sputnik have much greater influence than perception studies of opinions of Russia would suggest. Even when stories promulgated by Russian outlets are dismissed by the mainstream media, they gain traction through distribution by social media channels. RT's YouTube channel is popular and reaches a significant global audience, it was the first TV news channel to reach one billion views.²¹

Russia has embraced the digital revolution and Russian international news outlets are increasingly well funded and influential.

20. RT press release (2018) *RT Weekly TV Audience Grows By More Than A Third Over 2 Years*. Available online at: <https://www.rt.com/about-us/press-releases/ipsos-market-research-rt/> [Accessed 31 May 2018].

21. McAthy, R (2013) *How Russia Today reached one billion views on YouTube*. Journalism.co.uk. Available online at: <https://www.journalism.co.uk/news/how-russia-today-reached-one-billion-views-on-youtube/s2/a553152/> [Accessed 31 May 2018].

Apart from the extensive investment in online activity and international broadcasting, Russia is also following the more conventional approach to soft power by investing in international cultural and educational initiatives. Russia has several state organisations that operate in the soft power sphere. The Cold War era ballet diplomacy of foreign tours by the Bolshoi is matched today by courses in Russian language and literature, international celebrations of Pushkin, Malevich, cosmonauts and contemporary Russian film, and high-level strategic dialogues. Its cultural institutions have increased their global representation from 82 offices just five years ago to 171 today, showing the high priority the Russian government is placing on developing cultural influence and relationships overseas.

Founded in 2007 the Russkiy Mir Foundation has a rapidly expanding global network, including its newly opened centre in Tehran. Russkiy Mir offers Russian language courses – often through university departments – and an extensive programme of educational and cultural events including exhibitions and concerts. Established in 2008, Rossotrudnichestvo aims at the implementation of the state policy of international humanitarian co-operation and the international promotion of an ‘objective image’ of contemporary Russia. Rossotrudnichestvo is represented in 80 states of the world by 95 representative offices – 72 Russian centres of science and culture in 62 states plus 23 representatives of the Agency serving in Russian Embassies across 21 states.²² The priority of Rossotrudnichestvo is co-operation with the state-members of the Commonwealth of Independent States – each state has a Russian science and culture centre. It also offers short-term study visits to the Russian Federation for young representatives of political, public, scientific and business fields of foreign states under its New Generation programme.

Russia is looking for respect and recognition from other global powers. The strategic approach to power projection, the fusion of hard and soft power and the capacity and capability it has demonstrated in recent years to shape international affairs has significantly increased its global influence. Yet there has been a cost. Perceptions of Russia in the West have deteriorated even as its influence in other regions has grown. With the UK in particular the political and diplomatic relationship between the countries has deteriorated substantially. Cultural and educational exchange offers the best chance of rapprochement in the short/medium term, to creating channels of communication and restoring lost trust. Dialogue and confidence building measures using the arts, education, science and other ‘safe spaces’ for co-operation could play an important role in the longer term normalisation of diplomatic and political relations.

Russia country profile

Soft Power 30 ranking:	28
Freedom House ranking:	
Political rights:	7
Civil liberties:	6
Freedom status:	not free

Lowy Institute Global Diplomatic rankings total posts:	242
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GDP per capita:	\$10,743.1
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Source:
Portland Communications Soft Power 30 (2017) *Russia*. Available online at: https://softpower30.com/country/russian-federation/?country_years=2017 [Accessed 31 May 2018].
Freedom House (2018) *Freedom in the World 2018: Table of Country Scores*. Available online at: <https://freedomhouse.org/report/freedom-world-2018-table-country-scores> [Accessed 31 May 2018].
Lowy Global Diplomacy Index (2017) *2017 Country Ranking*. Available online at: https://globaldiplomacyindex.lowyinstitute.org/country_rank.html [Accessed 31 May 2018].
World Bank (2017) GDP per capita: current US\$. Available online at: <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD> [Accessed 31 May 2018].

22. Rossotrudnichestvo (2018) About Rossotrudnichestvo. Available online at: <http://rs.gov.ru/en/about> [Accessed 16 October 2018].

Members of Korean boyband NCT 127 pose for photographs during KCON in New York in 2018.

South Korea

South Korea’s government takes a strategic approach to soft power. With powerful neighbours in China and Japan and the risks posed by the North, South Korea has picked a careful path to cultivate trust and goodwill both within and beyond the region.

The Miracle on the Han River is a well-known story, the rapid reconstruction and development of the South Korean economy during the latter half of the 20th century took the state from a developing country to G20 stalwart. This is often overlooked in discussions about Korean soft power; the attractiveness of that dramatic economic progress to emerging economies is considerable. Other developing nations look to Korea as a trailblazer.

Today it is exporting its model of community development, Saemaul Undong, to countries like Uganda looking to emulate Korea’s economic success. A major element in Korea’s success has come from its reputation for innovation and technology. Samsung, LG and the other chaebols at the forefront of the digital revolution not only dominate the South Korean economy but are celebrated global brands that enhance Korea’s international appeal.



South Korea's economic success has leaned heavily on soft power to open up opportunities for trade. Korea has invested in big ticket events, hosting the 1988 Summer Olympics, co-hosting the 2002 FIFA World Cup, holding the Expo 2012 and, most recently, presenting one of the most diplomatically significant Winter Olympics ever.

Korean culture is a global success story. Hallyu, Korean Wave, has brought interest and respect to the country. The growth in the popularity of Korean television drama, film and pop music has spread beyond East Asia, to South and Central Asia, the Middle East and North Africa. In the UK Psy's *Gangnam Style* remains the best known manifestation of the international phenomenon that is K-Pop, but Korean pop acts have a dedicated following in Continental Europe, Latin America and the Middle East. KCON, the Korean Wave convention, has taken place in LA, Mexico City, Paris, Sydney, Abu Dhabi, Chiba and other cities around the world. Galbi and kimchi are increasingly popular with culinary audiences. Korean films like *Train to Busan*, *Snowpiercer* and *Oldboy* have not only been huge global hits but have also influenced filmmakers in Hollywood, Bollywood and all the other major centres of the movie industry. A successful state-sponsored campaign to promote Taekwondo internationally saw the sport debut in the Opening Ceremony of the 1988 Seoul Olympics and become a full medal sport in the 2000 Sydney Games. The Korean state has cultivated the cultural assets with the highest international appeal and in the process delivered a masterclass in nation branding. People around the world are increasingly wearing, listening, eating, drinking, watching and dancing Korean.

As part of its international relations strategy Korea began a programme of opening Cultural Centres in 2009 as part of a global effort to introduce itself to the world and spread interest in diverse aspects of Korean culture. As of 2016 there were 31 Korean Cultural Centres in 28 countries. Like their European counterparts, the centres organise events and courses under the categories of arts, music, literature, language, film and cuisine. The Korea Foundation is a public diplomacy organisation of the Republic of Korea that serves to enhance understanding of Korea and promote global friendship through exchange activities. It has overseas offices in Washington DC, Los Angeles, Tokyo, Beijing, Moscow, Berlin and Hanoi

reflecting the key priority places for Korean diplomacy. However, it also has a more extensive reach through international partnerships with Ministries of Foreign Affairs and cultural and educational institutions, including the Indian Council for Research on International Economic Relations and the Brazilian Ministry of External Relations. The state is also promoting the Korean language through the King Sejong Institute network. As of June 2018 there were 174 language schools, usually embedded in universities, in 57 countries.²³

Korea also offers a limited number of international scholarships like the KFAS International Scholar Exchange Fellowship that provides 50 scholarships for students from Cambodia, China, India, Indonesia, Iran, Iraq, Kazakhstan, Laos, Malaysia, Mongolia, Myanmar, the Philippines, Thailand, Uzbekistan and Vietnam to study at leading Korean educational institutions.²⁴ Again reflecting the Korean focus on the Eurasian century, scholarships are also now being offered to scholars from the Middle East. Korean public diplomacy is front and centre of Korea's international relations with festivals like 2015's São Paulo's Fashion and Passion, and 2016's the K-Soul Festival in Mexico City and the Korea-Iran One Heart Festival accompanied by high profile governmental delegations and the signing of trade and other partnership deals.

The Korea International Broadcasting Foundation is a not-for-profit group that began broadcasting internationally in 1999. The service has grown to include not only the English language Arirang TV and Radio services but also Arirang Arabic, reflecting Korea's increasing focus on the wealthy Gulf States.

*Arirang TV/Radio's objective is to burnish Korea's image in international communities and to improve relationships with foreign countries through close cooperation with broadcasting companies overseas. Arirang TV/Radio is dedicated to the development of broadcasting, media, and the advertising industry, along with the advancement of culture and art. Arirang's core business is to deliver programs worldwide via satellite 24 hours a day in order to improve the image of Korea.*²⁵

23. King Sejong Institute Federation *We communicate with the world through King Sejong Institute*. Available online at: <https://www.ksif.or.kr/ste/ksf/hkd/lochkd.do?menuNo=21101800> [Accessed 16 October 2018].

24. Korean Foundation for Advance Studies *International Scholar Exchange Fellowship 2017–2018*. Available online at: http://www.kfas.or.kr/download/board/isef_2017_2018.pdf [Accessed 16 October 2018].

25. The World On Arirang (n.d.) Company Profile: About Arirang. Available online at: www.arirang.com/prroom/About_ArirangN1.asp [Accessed 31 May 2018].

Unlike the international broadcasting platforms of the UK or France, Arirang offers not only news from a Korean point of view but also markets Korea as a destination for tourists by promoting Korea's cultural, gastronomic and sporting achievements. It's a different model and focus to the BBC World Service but Korea's priorities for the service are different to the UK, it wants to raise its profile, showcase its most attractive assets and tell its story. Arirang is part of the state's deliberate, strategic exercise in nation branding.

The South Korean reputation for innovation and creativity coupled with both a traditional and cutting edge cultural offer boldly promoted by a nation seeking to build its international influence is making a real difference to global perceptions. The success of the Pyeongchang Winter Olympics, complete with the diplomatic coup of the North's participation and subsequent high-profile summit diplomacy and tentative moves towards the normalisation of relations between the nations, has further raised the profile and leverage of South Korea on the global stage. But this success is nothing new. Within the G20 and other international fora, South Korea has long been adroit at building alliances to shape the agenda and drive forward global policy to its advantage. There are similarities with the German approach with both states regarded as eschewing the zero-sum approach and being seen to act to build a consensus based on mutual benefits – and in so doing achieve their aims without antagonising potential rivals.

South Korea country profile

Soft Power 30 ranking:	20
Freedom House ranking:	
Political rights:	2
Civil liberties:	2
Freedom status:	free
Lowy Institute Global Diplomatic rankings total posts:	172
GDP per capita:	\$29,742.8

Source:
Portland Communications Soft Power 30 (2017) *South Korea*. Available online at: https://softpower30.com/country/south-korea/?country_years=2017 [Accessed 31 May 2018].
Freedom House (2018) *Freedom in the World 2018: Table of Country Scores*. Available online at: <https://freedomhouse.org/report/freedom-world-2018-table-country-scores> [Accessed 31 May 2018].
Lowy Global Diplomacy Index (2017) *2017 Country Ranking*. Available online at: https://globaldiplomacyindex.lowyinstitute.org/country_rank.html [Accessed 31 May 2018].
World Bank (2017) GDP per capita: current US\$. Available online at: <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD> [Accessed 31 May 2018].

United States

In the Cold War the US was for many ‘the shining city on the hill’, ‘the land of the free’, where it was possible to live out the American Dream that promised affluence for people who worked hard and had talent.

That promise of liberty and success was and remains an essential element of the US’s soft power.

However, as David Skidmore lamented in his book *Paradoxes of Power: U.S. Foreign Policy in a Changing World*,

Soft power had become so identified with fighting the Cold War that few Americans noticed that, with the advent of the information revolution, soft power was becoming more important, not less... During the Cold War, radio broadcasts funded by Washington reached half the Soviet population and 70 to 80 percent of the population in Eastern Europe every week; on the eve of the September 11 attacks, a mere two percent of Arabs listened to the Voice of America (VOA).

‘Brand America’ has taken some knocks in recent years but it retains a global pull. American culture remains globally ubiquitous. Disney, Apple, Levi’s, McDonalds, Starbucks, Facebook, the Kardashians and other brands have unrivalled global reach. *Transformers: the Last Knight*, *The Fate of the Furious* and *Warcraft* have all enjoyed massive success in Chinese cinemas in the last year. A third of Egyptians have subscriptions to Facebook. And although it is apocryphal, the 2017 silly season story suggesting Scotland was the only country in the world where Coca-Cola wasn’t the most popular soft drink was seen as entirely credible to a mass audience on social media. And yet while the Soft Power 30 consistently ranks the US at or near the top of the chart, the authors of the 2015 report noted...

... there are many elements of soft power where the US is unrivalled. America attracts more international students than any other nation, American culture is globally ubiquitous, and the US sets the pace in tech and digital. If The Soft Power 30 rankings were calculated on objective metrics alone, the US would have... the top spot. However, the US finished sixteenth across an average of the polling categories. In many ways the American government and perceptions of US foreign policy tend to be a net detractor for American soft power.

Pointedly, that survey pre-dated the inauguration of President Trump and the blizzard of controversy that has ensued since. To put it another way, ‘there may be little or no relationship between America’s ubiquity and its actual influence today. Hundreds of millions of people around the world wear, listen, eat, drink, watch and dance American, but they do not necessarily identify these accoutrements of their daily lives with America’.²⁶ Indeed familiarity may breed contempt with some audiences appalled by the graphic portrayal of sex and violence of Hollywood’s biggest movies. Others are outright hostile to what they perceive as American cultural imperialism, seeing Americana as a threat to their identity and values.

The lack of a filtering mechanism or set of institutions to act as independent interlocutor between American culture and the diverse audiences of the world at large could be seen as a weakness in the US’s soft power. However, many of the functions of the European cultural relations delivery model are mirrored by the Department of State’s in-house Bureau of Educational and Cultural Affairs (ECA) that operates out of the US diplomatic network’s 300 plus embassies and consulates. As this is not an independent or quasi-independent organisation, it has not been possible to map its global presence in the same way as this report has sought to do for other key soft power nations.

The ECA’s mission is:

*to increase mutual understanding between the people of the United States and the people of other countries by means of educational and cultural exchange that assist in the development of peaceful relations.*²⁷

This is very similar to the mission of the British Council. The ECA operates a range of programmes, including educational and citizen exchanges, like the Fulbright scholarship programme and the International Visitor Leadership Program (IVLP) that has over the post-war decades brought over 300 future Presidents and Prime Ministers to the US. In its 2017 Soft Power 30, Portland Communications estimated that IVLP contributes \$52 million to the American economy.²⁸ It also runs American

26. Joffe, J (2006) *The Perils of Soft Power*. The New York Times Magazine. Available online at: https://www.nytimes.com/2006/05/14/magazine/14wwln_lede.html [Accessed 31 May 2018].

27. Bureau of Educational and Cultural Affairs (2015) *History and Mission of ECA*. Available online at: <https://eca.state.gov/about-bureau/history-and-mission-eca> [Accessed 31 May 2018].

28. Portland Communications Soft Power 30 (2017) *The Soft Power 30: A Global Ranking of Soft Power 2017*. Available online at: <https://softpower30.com/wp-content/uploads/2017/07/The-Soft-Power-30-Report-2017-Web-1.pdf> [Accessed 31 May 2018].

American culture remains globally ubiquitous. Disney, Apple, Levi's, McDonalds, Starbucks, Facebook, the Kardashians and other brands have unrivalled global reach.

English e-courses, sport diplomacy programmes, and a range of cultural interventions like the US Ambassadors Fund for Cultural Preservation that provides grants for the conservation of the historic environment. The ECA serves as part of the Public Affairs arm of the Department of State and operates overseas through the diplomatic network. However, with the ECA budget for the 2018 financial year set to halve, the administration has directed the ECA to focus its reduced resources on core global programmes such as Fulbright and the IVLP with many other cultural programmes facing cuts or even termination. The work of the National Endowment for Democracy (NED) is also set to be cut right back with the budget proposed to be reduced by two thirds.²⁹ The NED is the kind of non-partisan, independent, arms-length institution that can do so much for a state's soft power. Through its provision of grants for activists and civil society groups the NED creates goodwill and trust and builds the networks with the leaders of tomorrow that the state can then draw on. Significant budgetary reductions are also planned for Voice of America, the closest US equivalent to the BBC World Service. Voice of America's platform was reinvigorated after 9/11 and today offers news and information in 45 languages and has a weekly audience of over 236.8 million. The US government supports the popular 24/7 Arab language Alhurra TV channel, Radio Sawa, Radio Free Asia, and Radio and Television Martí.³⁰

The profile of the new budget that sees cuts to the work of the NED and increases in the already massive defence budget reflects the priority the Trump administration gives to hard power and the seemingly lack of regard for soft power. America has traditionally been viewed as using its power for more than the promotion of its own interests. There has been a belief in many countries that the US has acted to help maintain the rules-based international system and in so doing support a broader common good.

The change in tone in Washington, both in terms of defence and economic policy is eroding that reputation and changing the calculations in capitals around the world. This has already had an impact on the choices of prospective students and academics that have traditionally flocked to American universities, for example there was a fall of three per cent in applications to American graduate schools from international students between 2016 and 2017.³¹ If this trend continues at a time of growing international student mobility, it will have an impact on the relative financial and intellectual resources of US universities. It will also affect the economy more widely. The nearly one million foreign students attending American higher education institutions contribute \$30.5 billion to the American economy. It will also impact on the US's future connections and networks. Going forward a loss of goodwill could mean states are less likely to give American policies the benefit of the doubt, to believe it is acting as a positive force in global affairs.

29. US Department of State (2018) *Congressional Budget Justification Department of State, Foreign Operations, and Related Programs*. Available online at: <https://www.state.gov/documents/organization/277155.pdf> [Accessed 31 May 2018].

30. Broadcasting Board of Governors (n.d.) *Who we are: Mission*. Available online at: <https://www.bbg.gov/who-we-are/mission/> [Accessed 31 May 2018].

31. Redden, E (2018) *More Evidence of a Drop in International Grad School Enrollment*. Inside Higher Ed. Available online at: <https://www.insidehighered.com/news/2018/01/30/council-graduate-schools-survey-finds-declines-international-applications-new> [Accessed 31 May 2018].

Yet while it cannot be ignored, the impact on US soft power should not be overestimated either. There is a difference between the Twitter echoverse and a longer term loss of position. Despite the significant cuts proposed to the State Department budget, the US continues to be a major contributor of international aid. The \$39.3 billion budget proposed for State and USAID for the 2019 financial year means America will remain one of the biggest contributors to international development.³² It may miss the totemic 0.7 per cent of GDP target that the UK and a handful of other countries achieve by a significant margin but the US's public health programmes tackling AIDs and other global challenges are among the biggest and most impactful. US philanthropists and foundations have also developed an impressive track record of giving billions of dollars to important global causes, such as the massive donations from the Gates Foundation to support global health issues. Pioneering US programmes in microfinance have also empowered women and helped lift whole communities out of dependency. Such programmes may not have the visibility of the infrastructure and other grand projects built with Chinese money but they have been transforming lives and generating the connections and goodwill at the grassroots on which lasting influence depends.

The State Department also runs the EducationUSA network of over 425 international student advising centres in more than 175 countries, promoting study in the US and offering advice on scholarships and other opportunities.³³ The US has long benefited from its position as the most popular destination for international students. The reputation and benefits of an Ivy League education will remain a lure for the leaders of tomorrow even if the numbers attending take a dip in the short term.

The US has always used all available tools for engagement, Roosevelt's philosophy remains salient, 'speak softly and carry a big stick'. Peaceful negotiation from a position of strength has been the core of America's foreign policy successes. It has used hard economic and military power, allied with significant soft power assets to achieve its aims, an approach that Nye and others have referred to as smart power. However, the truly smart thing about American power in the 100 years since Woodrow Wilson's seminal Fourteen Points speech has been the emphasis on the common good. The US has been at its most influential – and its interests best served – where it has been perceived as acting in the broader interest of the global community. Moving to a zero-sum view of the world risks leaving everyone, but most especially the US itself, worse off.

United States country profile

Soft Power 30 ranking:	4
Freedom House ranking:	
Political rights:	2
Civil liberties:	1
Freedom status:	free
Lowy Institute Global Diplomatic rankings total posts:	273
GDP per capita:	\$59,531.7

Source:
Portland Communications Soft Power 30 (2017) *United States*. Available online at: https://softpower30.com/country/united-states/?country_years=2017 [Accessed 31 May 2018].
Freedom House (2018) *Freedom in the World 2018: Table of Country Scores*. Available online at: <https://freedomhouse.org/report/freedom-world-2018-table-country-scores> [Accessed 31 May 2018].
Lowy Global Diplomacy Index (2017) *2017 Country Ranking*. Available online at: https://globaldiplomacyindex.lowyinstitute.org/country_rank.html [Accessed 31 May 2018].
World Bank (2017) GDP per capita: current US\$. Available online at: <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD> [Accessed 31 May 2018].

32. *Ibid.*
33. Education USA (2018) Available online at: <https://educationusa.state.gov/> [Accessed 16 October 2018].

United Kingdom

As well as being a globally significant economic and military power the UK is, according to Portland Communications³⁴ latest league table at least, the world's leading soft power in 2018.

In a very real sense it is the gold standard against which others measure themselves. But despite its many strengths the UK's current soft power advantage is no reason for complacency. There are areas of weakness and as we have seen above other states are investing substantial sums in soft power to expand their international influence. There are lessons to learn from other countries that are adopting increasingly innovative approaches to growing their global influence. There is no guarantee that the UK will maintain its leading global position as the Eurasian Century proceeds and leading states across the Global South continue to grow in importance. The UK will need to work hard to retain and grow its international relevance and influence.

The UK's status as a soft power superpower depends on the country's near-universal diplomatic network and globally recognised institutions like the BBC World Service and British Council, all of which receive funding from the Foreign and Commonwealth Office (FCO). The UK is also noted for consistently outperforming other G20 states for its contributions to international development and for working constructively with partners to meet major global challenges like climate change and to promote free trade. The UK also benefits in soft power terms from its significant strengths in culture and education, the English language and its strong historic and cultural connections with the English speaking world which includes major G20 powers like the US, Canada and India. The UK's membership of the Commonwealth presents potentially significant opportunities in the years ahead, especially as developing economies like Kenya and Bangladesh realise their massive economic potential.

And yet for all these advantages, when America is seen to be stepping back from global leadership it is Germany rather than Britain that is seen as the leading bulwark of the international liberal order. And increasingly 'President Macron' of France appears to be the answer to Kissinger's apocryphal question, 'Who do I call if I want to speak to Europe?' Globally, Britain is perhaps seen as so preoccupied with the practicalities and melodrama of Brexit as to be unable to take the lead on the key international challenges of the day.

The UK will need to work hard to retain and grow its international relevance and influence.

34. Portland Communications Soft Power 30 (2018) *The Soft Power 30: A Global Ranking of Soft Power 2018*. Available online at: <https://softpower30.com/> [Accessed 31 May 2018].

Brexit certainly poses challenges for the UK. Like 'America First', Brexit is perceived by many Western liberals as a step back from the world. There is certainly work to be done to renew the UK's influence in its near neighbourhood. This is a greater challenge than is often understood, while geographically untrue, politically and emotionally for many Europeans the EU is Europe and the UK's move to leave is seen as a rejection of more than just a supranational bureaucracy, it is seen as an abandonment of a shared identity and future. While the UK took a very active part in supporting the former Warsaw Pact countries' ambitions to join what became the EU, its subsequent ambivalence towards the European Project coupled with the failure to match other member states' levels of engagement with the peoples of Europe saw its influence on the Continent wane. In the light of the negative impact of Brexit on European perceptions of the UK, and the cost that may have in terms of lost economic opportunities and declining influence, there is a pressing need for the UK to invest in Continental soft power initiatives and connections to restore trust and goodwill. However, Brexit also offers an unique opportunity for the UK to reinvigorate its global ties to old allies like the US and Japan and forge stronger ties with fast growing economies in Asia, Africa and Latin America.

The UK's top spot in the soft power league tables depends in large part on perceptions of the country as an open, liberal, democratic country that upholds the rules-based international system and acts for the common good. The UK is seen as supporting the political freedoms and other values that the peoples of the world find attractive. Humanitarian interventions, like the action the UK undertook to combat Ebola in West African nations, have enhanced the UK's international reputation. As the UK looks to define its new role in the world there may be merit in offering greater support for multilateral initiatives like UN peacekeeping – additional UK expertise and technical capability would be welcomed on UN humanitarian missions around the world. The Department for International Development and the FCO have made laudable advances in the promotion of the rights of women and girls and this work must be maintained. The promotion of universal human rights is the absolute responsibility of free and democratic states but it is also essential to their international influence and appeal. Some have argued that the UK has in recent years been somewhat muted in its criticism of the worst abuses of authoritarian states. If it prioritises economic pragmatism

over principle it could risk undermining its soft power and influence in global fora like the UN General Assembly and the court of global public opinion. A continued emphasis on values and the common good will be crucially important going forward. Indeed it is essential for both restoring the trust and confidence of European allies and for reaching out beyond the EU to the rest of the world. An increase in the resources available to the Westminster Foundation for Democracy and the Magna Carta Fund for Human Rights and Democracy would, for example increase the impact and visibility of the UK's human rights work with consequential gains in soft power.

Socio-cultural and educational 'assets' are a key part of the UK's international attractiveness. The UK's universities are globally recognised and draw students from around the world to the UK. Having recently lost its long-held position as the number two global destination for international students to Australia it is very much in the UK's interest to learn from its rivals and review its immigration policies with regards to students and researchers. Australia's success in growing market share can be traced to the changes made to immigration policy following the Knight Review of 2011 – just as the comparatively flat performance of the UK since 2010 is consistent with the tightening of its visa regulations.

Like the US and other countries in this study the UK offers scholarships to international students. The Commonwealth Scholarship Commission for example offers around 800 awards for postgraduate study and professional development every year.³⁵ That provision could be usefully expanded to increase opportunities for developing links with the future leaders of both established powers like India, Nigeria, Singapore and South Africa, but to also look to engage with leaders and entrepreneurs of high-growth economies like Kenya, Tanzania and Malaysia. The UK can afford to be ambitious and could also explore a model for the Commonwealth similar to the EU's Erasmus+ programme. Erasmus+ itself is a massive boon to the UK with EU nationals and students from the EU neighbourhood flocking to the UK's world-leading universities. The UK can ill afford the loss of influence that withdrawal from the programme would cost.

The arts and creative industries are just as important to the UK's soft power as its universities and are one of the success stories of the UK economy in recent years. James Bond, Harry Potter and other icons both fictional and real

35. Commonwealth Scholarship Commission (2017) *58th Annual Report to the Secretary of State for International Development*. Available online at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/671985/Annual-Report-2017.pdf [Accessed 31 May 2018].

all contribute to the attractiveness of the UK while the UK's great cultural institutions like the British Museum and the Premier League have mass global appeal. The English language is another very significant advantage. English is, for now at any rate, the lingua franca of the world. France may aspire to lead the francophone world but that world also wants and needs to speak English to communicate and do business with other cultures.

Conversely one area where the UK does need to focus is the lamentable level of foreign language learning in schools and universities. Global Britain will remain little more than a slogan if the UK is monoglot and interculturally illiterate. Investing in a citizenry and workforce that can engage internationally is essential to the UK's future prosperity. The UK needs to support outward student mobility through continued participation in programmes like Erasmus+ as well as opening up new opportunities to other countries to ensure young people are fully equipped to engage in the new markets that will be essential to the UK's future success. The continued dominance of English is far from guaranteed in the Eurasian Century.

The City of London is another crucial element in the UK's soft power. The City plays an essential (hard power) role in the global economy granting the UK significant influence internationally but it also exerts a global attraction. The professionalism, expertise and financial wizardry of the bankers, lawyers, fund managers, insurers and myriad other parties that are essential to the conduct of international business concentrated together in a convenient time zone in a state with a stable, open, liberal economy and trusted independent legal system bring people from around the world to London. London is also home to some of the world's greatest cultural and educational institutions. It is one of the world's fashion capitals, a shopper's paradise and one of the world's most favourable locations for innovative entrepreneurship, rivalling Silicon Valley as a place to pioneer new ideas and develop new businesses. Tomorrow's Googles and Amazons are being developed in hubs like Silicon Roundabout and the King's Cross Knowledge Quarter.

The BBC World Service and the British Council are the UK's main soft power agencies, though neither actually describes themselves as such. The British Council is 'the UK's international organisation for cultural relations and educational opportunities'.³⁶ On the ground in over 100

countries and territories, the British Council delivers a range of programmes and services around the world to build a friendly knowledge and understanding between the people of the UK and other countries, delivering everything from the UK pavilion at the Venice Biennale through strategic dialogues in Jakarta to English language teaching in rural Colombia and student exchanges with Switzerland. The British Council runs cultural seasons, having adopted an approach first championed by the Institut Français. 2017 saw the UK–India Year of Culture while 2018 sees the focus on cultural connections with Germany. The British Council's grant-in-aid income from the FCO in 2017–18 was £168 million. The reason the British Council is recognised as a global leader in soft power is that it is focused on the long term, on building meaningful, lasting, mutually beneficial people-to-people connections and trust through cultural relations. Its operational independence from government gives it credibility and legitimacy in the eyes of audiences, both internationally and domestically, making it a trusted actor even in countries where the UK government is viewed with suspicion. It supports and motivates third parties, helping those non-state individuals, organisations and institutions that are often the best builders of trust to engage internationally by creating international opportunities for collaboration and co-operation.

The BBC World Service is a global leader in international news, broadcasting on radio, television and online. It provides impartial news reports and analysis in English and 27 other languages. Now funded from the TV Licence Fee, with the FCO committed to providing £289 million of additional funding to 2020, the BBC World Service has a weekly audience of 372 million around the world but has set out plans in its Vision 2020 strategy to grow its global audience to 500 million with an expanded range of services, including:³⁷

- New language services in Afaan Oromo, Amharic, Tigrinya, Igbo, Yoruba, Pidgin, Gujarati, Marathi, Telugu, Punjabi and Korean.
- The expansion of digital services; extended news bulletins in Russian, with regionalised versions for surrounding countries.
- Enhanced television services across Africa, including more than 30 new television programmes for partner broadcasters across Sub-Saharan Africa.

36. British Council (n.d.) *Our Organisation*. Available online at: <https://www.britishcouncil.org/> [Accessed 31 May 2018].

37. BBC News *BBC World Service announces biggest expansion 'since the 1940s'*. Available online at: <https://www.bbc.co.uk/news/entertainment-arts-37990220> [Accessed 31 May 2018].

- New regional programming from BBC Arabic.
- Short-wave and medium-wave radio programmes aimed at audiences in the Korean peninsula, plus online and social media content.
- Investment in World Service English, with new programmes, more original journalism, and a broader agenda.

For both the BBC World Service and the British Council digital platforms are an increasing priority, young people are much more likely to use social media and digital media as their main source of news and for learning and cultural engagement.

The planned expansion in the range of services offered by the BBC World Service reflects a growing focus by the UK government on the world outside the EU that predates the Brexit vote. The Global South is an increasing priority for the government – the vast majority of the resources provided to the British Council by the FCO are now ring-fenced for work in the developing world. It is worth comparing this approach with that of other international cultural relations institutions where the bias is towards expanded investment in the developed world. The UK is right to look for new allies and partners but in the process cannot afford to lose influence with the established powers that will be crucial to its prosperity and security in the short and medium term.

If the ambitions for the BBC World Service are matched with investment in the other engines of the UK’s soft power the UK’s status as a soft power superpower can be secured for the medium and long term, with all the benefits that entails for the UK’s prosperity and security in the years ahead. However, that status depends on more than just funding. The UK needs the right kind of Brexit, an open Brexit and a vision beyond that which looks outward rather than inward, that rejects the traps of popularism and nativism and reinvents the UK as a more global nation. The UK’s soft power depends on it being continued to be viewed as stalwart of liberal values and the rules-based international system; as a champion of universal human rights, free trade and freedom of expression; and as a reliable friend committed to the common good and the betterment of other peoples. The Brexit negotiations are textbook example – they are anything but a zero sum game with success reliant on trust and goodwill on both sides. Morality, values and being seen as acting for the common good have long been at the heart of the UK’s soft power but in the world today they are absolutely essential to its success.

United Kingdom country profile

Soft Power 30 ranking:	1
Freedom House ranking:	
Political rights:	1
Civil liberties:	1
Freedom status:	free
Lowy Institute Global Diplomatic rankings total posts:	225
GDP per capita:	\$39,720.4

Source:
Portland Communications Soft Power 30 (2017) *United Kingdom*. Available online at: https://softpower30.com/country/united-kingdom/?country_years=2017 [Accessed 31 May 2018].
Freedom House (2018) *Freedom in the World 2018: Table of Country Scores*. Available online at: <https://freedomhouse.org/report/freedom-world-2018-table-country-scores> [Accessed 31 May 2018].
Lowy Global Diplomacy Index (2017) *2017 Country Ranking*. Available online at: https://globaldiplomacyindex.lowyinstitute.org/country_rank.html [Accessed 31 May 2018].
World Bank (2017) GDP per capita: current US\$. Available online at: <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD> [Accessed 31 May 2018].

Conclusion

The UK is, currently, the world's leading soft power. But there are many uncertainties for the future. Brexit itself has yet to happen and the full repercussions of the UK's decision to leave the European Union will not become clear for years perhaps decades to come. This paper provides a soft power perspective on the changed world the UK faces as it charts a new course in the post-Brexit era.

From reviewing the soft power activities and especially the global presence of leading nation's cultural institutes several clear trends become apparent. Firstly, there has been a significant increase in the physical presence and levels of investment in cultural institutes and soft power activity globally. This is clearest in the cases of China and Russia, with the massive expansions of their work in this area over the past five years. But it is also reflected by the increases in the investment of other states like Brazil and South Korea, as well as other countries not covered in this study like Turkey and Saudi Arabia. This reflects a growing desire by China, Russia and other states to increase their influence on international affairs. In many ways, increased activity in this area should be welcomed by all. Countries investing in more cultural and educational ties around the world can help to build international trust and understanding, support mutual respect and mutually beneficial ties between states, and help to foster international peace, security and prosperity. However, it does also pose questions about the UK and other Western states' future influence. Will the countries like the UK, France and Germany that currently top the Portland Soft Power index remain the leading soft power states in the longer term?

At the same time the networks of the Confucius Institute and Russkiy Mir Foundation have been undergoing rapid expansion, the global presence of the main European cultural institutes around the world has been falling, with networks of the British Council, Institut Français, Italian Cultural Institute and the Cervantes Institute all significantly smaller than they were five years ago. Are the Western soft powers in retreat? It is not as clear cut as that. The Trump administration may be reducing the resources of the ECA but Germany has been bucking the

trend and increasing investment in the Goethe-Institut and its other cultural relations organisations. Under President Macron France looks set to do the same. The UK faces a clear choice, a managed relative or absolute decline of its publicly-funded global networks, especially in the developed world, or a commitment to new investment in the institutions and initiatives that build trust and forge the international connections on which influence depends.

The comparison analysis highlights both the commonalities and diversity of approaches adopted by states to develop their soft power activity. Some countries' approaches are clearly proving more effective than others, with levels of spend and size of physical networks not necessarily the most important indicator of soft power success. However, the longer-term implications of the rapid change in soft power spend are unclear and it may simply be that there is a time lag between increases in activity and impact. Soft power has always been a long-term investment – it takes time and continued engagement to foster trust and shift perceptions. It would be reasonable to anticipate growing influence for those states that are now significantly ramping up their activity. The long-term impact of China's engagement with Sub-Saharan Africa is particularly telling in this regard, public opinion is already becoming more positive and it will be fascinating to see how this develops as relationships mature.

There are certainly lessons for the UK from the different approaches of other soft powers. Germany's investment in cultural relations has had a direct benefit to its economy and is a model worth careful scrutiny. The emphasis on student mobility – both bringing international students to the country and ensuring young Germans gain international experience in Asia is particularly important. The Commonwealth represents a clear opportunity for the UK. As a family of nations, it is united by shared values – democracy, freedom of speech, human rights and the rule of law – as much as it is by its shared linguistic, legal and cultural history. These values are robust foundations on which the UK can build greater multilateral links. The experience of Brazil with the CPLP offers insight on how the UK might seek to re-energise the Commonwealth.

What is very clear is that now more than ever it is essential for the UK to be building its global networks and telling its story internationally, explaining its intentions and policies and to be listening to the ambitions and anxieties of other states. In an increasingly crowded market the UK cannot afford to be complacent, it needs to respond to the implications of the vast sums being invested in soft power by China, Russia and other countries seeking to influence the global discourse and shape events. Especially with cuts facing Voice of America, it is absolutely imperative that the BBC World Service continues to provide even-handed, accurate reporting to a global audience that is increasingly being bombarded by fake news and propaganda and faced with the growing threat to freedom of expression posed by censorship and authoritarianism. This is both a moral duty and a sound strategy in an era where a story concocted in one country can cause riots in another.

Whether you consider the wider geopolitical drivers or the immediate task of leaving the European Union, now more than ever it is essential for the UK to be renewing and growing its international connections, building networks of influence and collaboration, explaining its intentions and policies and listening to the ambitions and anxieties of other states. Brexit presents challenges but it also offers opportunities for the UK. By embracing an ambitious vision and strategy for soft power, backed by sufficient investment, a continued commitment to multilateral co-operation and development; and a renewed investment in the diplomatic network, the UK can make a reality of the ambition for a Global Britain.

What is very clear is that now more than ever it is essential for the UK to be building its global networks and telling its story internationally...

Recommendations

There are several practical steps that could help the realisation of the UK government's vision of a global Britain and secure a successful international role after Brexit. The UK could:

- Consider its soft power priorities for the future. In recent years it has been reducing its soft power footprint in developed nations, targeting funding on the developing world. While the priority given to the Global South makes strategic sense for the UK's long-term security and prosperity, there is an urgent need for investment in the developed world to restore trust and confidence with European allies and deepen connections with countries like Canada, Japan, Australia and the US to safeguard the UK's position in the short and medium term.
- Develop a clear and ambitious long-term vision and strategy for UK soft power and global connections after Brexit, including increased investment in the critical agencies of the UK's soft power. The UK cannot realistically match the resources China is putting into its Confucius networks, or pumping into the BRI. Instead the UK needs to be smart, to understand what is truly impactful and target resources accordingly to support a values-based approach to the fostering of soft power. To maintain and increase its influence it needs to invest in institutions that build trust including: the diplomatic network, the BBC World Service, the British Council, the Commonwealth Scholarship Commission, Westminster Foundation for Democracy, and the Magna Carta Fund for Human Rights.
- Redouble work with other member states, especially India, Australia, Canada, Singapore and South Africa, to reinvigorate the Commonwealth of Nations, learning from the Brazilian experience with the CPLP to realise the opportunities for co-operation and building shared prosperity.
- Reconsider its approach to visa regulations for international students, researchers and artists coming to the UK, expanding the research base to ensure policy is based on robust evidence and moving on from the 'hostile environment' to a climate of welcome. The UK needs a regulatory system that encourages rather than deters 'the brightest and best' to come to the country to ensure the UK maintains its status as a leading destination for the education of future leaders.
- Learn from China and Germany and significantly expand the number of scholarships it offers to international students and researchers. These could be targeted at key markets where the UK is looking to increase its profile and influence. The UK could also learn from the US NED programme and look to ways to further support civil society activists around the world.
- Address the growing skills gap in the UK workforce by encouraging language learning in schools and universities and supporting the outward mobility of UK students – it isn't just linguists who need international experience, intercultural skills are increasingly important in a globalised economy as the German experience shows. The UK should also continue to participate in Erasmus+ and look at ways to expand opportunities outside the EU and its immediate neighbourhood, for example through the introduction of a similar programme for the Commonwealth. Exchange programmes like Erasmus+ that promote the two-way traffic of international students both build relations with future leaders and empower citizens of the home nations to confidently and effectively engage internationally.

2018 Beijing Summit
of the Forum on
China–Africa cooperation
in Beijing, China.





Sources for Figure 1 (page 7), Figure 2 (page 8) and Figure 3 (pages 10–11):

The 2013 data is taken from the British Council's Influence and Attraction report, available online at: <https://www.britishcouncil.org/sites/default/files/influence-and-attraction-report.pdf>

The 2018 data is taken from the following primary sources:

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