Research and insight

Trends in soft power 2020–25

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Contents

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Executive summary

This systematic comparative analysis of soft power across 25 jurisdictions covering the period 2020–2025 (see Table 1) and drawing on available quantitative and qualitative evidence identifies marked shifts in how nations deploy cultural, educational and diplomatic resources to achieve international influence. The global soft power landscape increasingly rewards strategic coherence over resource scale, with evidence suggesting that countries achieving closer alignment between policy objectives, institutional mandates and programme delivery secure superior returns on investment.

Germany emerges from this study as the most effective soft power performer due to its well-established, integrated institutional approach. This reflects the benefits of the tripartite structure linking the Goethe-Institut, the German Academic Exchange Service (DAAD – Deutscher Akademischer Austauschdienst) and German International Cooperation (GIZ – Deutsche Gesellschaft für Internationale Zusammenarbeit), which has operated successfully for over a decade. The findings suggest that sustained institutional specialisation can maximise impact while maintaining strategic coherence.

Traditional soft power leaders are facing mounting challenges as the international environment becomes more competitive. The United States is undergoing retrenchment of public diplomacy infrastructure under the second Trump presidency, driven by ideological shifts in foreign policy priorities and a reorientation towards hard power investments rather than efficiency concerns. This retrenchment, including significant reductions in U.S. Agency for International Development (USAID) programmes and constraints on Voice of America, creates strategic opportunities for competitors. Whilst China has contracted its Confucius Institute network by approximately 54 per cent (from 990 to 459 locations, as detailed in Section 3.4) following international pressure and host country concerns about academic freedom, it is simultaneously repositioning its soft power strategy through the Chinese International Education Foundation and maintaining substantial investment in other mechanisms, potentially capitalising on aspects of the vacuum created by US retrenchment.

Table 1: The 25 study jurisdictions

Argentina	European Union	Italy	Portugal	Spain
Australia	France	Japan	Republic of Korea	Türkiye
Brazil	Germany	Kenya	Russia	UAE
Canada	India	Mexico	Saudi Arabia	UK
China	Indonesia	Nigeria	South Africa	USA

Main findings:

1. Strategic coherence and resource efficiency: Countries achieving superior outcomes demonstrate stronger alignment between strategic objectives, resource allocation and operational activities. Germany's integrated approach generates substantial impact from its institutional specialisation and clear mandates.

2. Commercial cultural amplification: Republic of Korea's Korean Wave illustrates how cultural industries can multiply soft power effectiveness by market mechanisms, creating collaborations between private-sector success and public diplomacy initiatives.

3. Geographic concentration benefits: Resource-constrained countries achieve better outcomes from regional engagement rather than globally dispersed presence. Australia's Indo-Pacific concentration provides one model of strategic prioritisation.

4. Digital platform advantages: Countries effectively integrating digital strategies achieve substantially lower per capita costs than those relying primarily on traditional infrastructure, although success depends on sustained content creation and cultural understanding across target markets.

5. Educational network building: Long-term investment in scholarship programmes and institutional cooperation creates expanding networks of influence as participants advance in their careers while maintaining connections to sponsoring countries.

6. Traditional power adaptation challenges: Established actors including the United States and United Kingdom face persistent coordination difficulties rooted in institutional path dependencies. US retrenchment and the UK's long-standing challenge of aligning strategic priorities with resource deployment demonstrate how legacy structures can impede adaptation.

Overall, the analysis indicates that nations can navigate an increasingly competitive soft power environment by means of greater strategic coherence and efficiency, while recognising the fluid and rapidly changing nature of the international system. Outcomes, however, reflect multiple interacting factors beyond the measurable variables recorded in this study, and causal attribution should therefore be treated with appropriate caution. This conclusion aligns with contemporary academic and policy thinking on the determinants of soft power effectiveness.

1

Introduction

1.1 The report's aims

This study provides a comprehensive comparative analysis of soft power across 25 jurisdictions, examining how nations deploy cultural, educational and diplomatic resources to achieve international influence in an increasingly competitive environment. Building on six previous waves of research conducted between 2013 and 2024, the primary objective is to provide actionable intelligence for the British Council and its partners on evolving soft power strategies and their effectiveness.

The research deals with three interconnected dimensions of soft power capability:

- **Soft power assets** comprise the specific resources countries can deploy, from cultural products and educational expertise to research capabilities and creative industries.

- **Soft power infrastructure** encompasses the systems, networks and platforms that enable international influence, including diplomatic networks, cultural institutions, educational establishments and digital platforms.

- **Soft power outcomes** represent the measurable results of these investments, shown by international rankings, economic indicators and measures of influence and perceptions.

The analysis tracks changes since 2020 while establishing baselines for future monitoring, enabling identification not only of current trends but also their trajectories. This longitudinal perspective reveals whether changes represent tactical adjustments or more fundamental shifts in how nations conceptualise and operationalise soft power. Understanding these deeper structural transformations is essential for strategic planning, as temporary fluctuations require different responses compared to sustained directional changes in soft power approaches.

1.2 Analytical approach

The study encompasses nations with diverse approaches to soft power, from established practitioners with extensive global reach like France and Germany, to regional powers pursuing focused regional strategies such as Australia and Canada, and emerging actors including the United Arab Emirates and Saudi Arabia. This selection enables comparison across different models of engagement, levels of resource commitment and strategic priorities. The inclusion of both democratic and authoritarian systems provides insights into how different governance models shape soft power strategies.

1.3 The AIO approach to soft power metrics

The research establishes a comprehensive Assets-Infrastructure-Outcomes (AIO) framework that systematically links national capabilities to international impact. This three-part structure enables tracking of relationships between what countries possess (assets), how they deploy these resources internationally (infrastructure), and what results they achieve (outcomes). However, as acknowledged in Section 2, comprehensive asset mapping was beyond this phase's scope. The current study therefore provides robust analysis of infrastructure deployment and outcomes, while asset analysis remains more limited due to data constraints and the complexity of systematically mapping capabilities across multiple domains and jurisdictions.

1.4 Context

The international environment has become markedly more challenging since 2024, with geopolitical tensions intensifying across multiple regions and economic uncertainty affecting traditional funding models for international engagement. As ICR Research's 2024 study *Soft Power at a Turning Point* documented, countries are increasingly prioritising national interests over multilateralism, explicitly linking soft power to economic objectives, and facing pressure to demonstrate domestic benefits from international engagement. These trends are accelerating and deepening, evolving from emergent patterns into dominant forces reshaping international soft power and cultural relations.

The year 2025 has witnessed particularly dramatic shifts. The United States has undergone substantial retrenchment following President Trump's establishment of the Department of Government Efficiency (DOGE) in early 2025, with USAID operations formally ceasing as a standalone agency on 1 July 2025, Voice of America staff placed on administrative leave from March 2025 and substantial reductions across public diplomacy programmes. Simultaneously, China has contracted its Confucius Institute network by 54 per cent (from 990 to 459 locations) between 2024 and 2025, following international pressure and host country concerns about academic freedom. These simultaneous contractions by major soft power actors are reshaping the competitive landscape, creating both challenges and opportunities for other countries.

Soft power assets

2

2.1 Introduction

Soft power assets constitute the domestic endowments, capabilities and resources that provide the foundation for a nation's potential international influence and attraction. They represent the fundamental building blocks from which all soft power projection ultimately derives, encompassing both tangible resources such as universities, historic monuments, museums and media organisations, and intangible qualities including cultural heritage, linguistic reach and institutional reputation.

Assets exist independently of their international deployment and may generate influence from commercial or civil society channels rather than formal government programmes. The framework distinguishes between different categories of assets to enable systematic assessment, while recognising that their effectiveness depends on quality, accessibility and cultural resonance rather than simply quantity or scale.

2.2 What our research can say about assets

The current study collected data on asset categories where information was publicly available and systematically comparable across jurisdictions. Cultural assets were assessed using indicators including creative industries' output, international cultural recognition and commercial cultural exports. Educational assets were measured by university rankings, international student enrolments, research output and academic collaboration patterns. Scientific and technical assets were evaluated using research and development expenditure, patent filings, scientific publication volumes and citation impacts.

For these measurable dimensions, the research provides comparative data across all 25 jurisdictions in the study. The findings reveal significant variations in asset endowments, with traditional powers generally maintaining advantages in educational and scientific capabilities, while emerging actors demonstrate rapid advancement in specific domains, particularly cultural production and digital content creation.

This study also suggests that countries cannot rely on a single asset class to achieve soft power outcomes. For example, countries with substantial educational assets may achieve only moderate soft power outcomes relative to their capabilities. The United States maintains 15 universities in the global top 20[1] and dominates research output with approximately 25 per cent of the world's most highly cited papers. Yet it achieves, by our measure, an outcome substantially below Germany, despite Germany having only two universities in the top ten. Similarly, France possesses substantial educational infrastructure and research capacity, yet it achieves a lower outcome than countries with more modest educational assets but superior strategic coordination. Conversely, Republic of Korea demonstrates that countries can achieve strong soft power outcomes without extensive traditional educational advantages, by focused deployment of cultural assets and strategic coherence.

Republic of Korea exemplifies strategic focus rather than comprehensive coverage. Rather than attempting to compete across all soft power domains, Republic of Korea identified its comparative advantage in cultural production – particularly entertainment, digital content and popular music – and systematically leveraged this strength. While ranking outside the top tier in traditional measures of educational and scientific assets, Republic of Korea achieves remarkable soft power gains from focused investment in cultural infrastructure that amplifies commercial success. Government agencies provided enabling support (copyright protection, market access negotiation, digital platform development), while allowing creative industries substantial autonomy, demonstrating that strategic concentration on areas of natural strength can generate superior outcomes compared to dispersed investment across multiple areas.

2.3 What our research cannot yet say about assets

Comprehensive mapping of soft power assets across all relevant dimensions was not undertaken for this study. Several factors constrained the depth of asset analysis that could be achieved within the available timeframe and resources.

Definitional challenges remain significant. The boundaries of what constitutes a soft power asset are contested, with assets existing on a spectrum from domestic institutions with international spillover effects to purpose-built influence mechanisms. Clear definitional parameters require further development from consultation with stakeholders and refinement based on empirical observation of what capabilities actually generate international influence.

[1] Times Higher Education (2024) World University Rankings 2024. London: THE.

Data constraints present substantial barriers to comprehensive asset mapping. Soft power assets span government departments, cultural institutions, private organisations and civil society with no centralised registry. Information about funding, governance, reach and effectiveness is often dispersed, confidential or not systematically collected, particularly for hybrid public private initiatives. Non-English speaking countries present additional challenges, as asset information may exist only in local languages or follow different reporting conventions that complicate cross-national comparison.

Measurement difficulties compound these challenges. Developing consistent metrics for comparing diverse assets is problematic without sophisticated analytical frameworks. University programmes, cultural centres and digital platforms vary enormously in scale, scope and intended outcomes, making comparison difficult. How does one weigh the relative soft power contribution of a prestigious university against a popular cultural export or a widely spoken language? Such questions require careful consideration of the mechanisms by means of which different assets generate influence.

The dynamic nature of soft power assets adds further complexity. Assets can change rapidly based on political priorities, funding cycles and global events. Any mapping exercise would require regular updating to remain policy-relevant, adding to complexity and resource requirements. The rise of digital platforms and social media has fundamentally altered how cultural assets operate, creating new categories that did not exist in earlier soft power frameworks.

Linguistic assets present particular challenges for systematic assessment. While the global reach of major languages like English, Spanish, French and Mandarin Chinese can be estimated from speaker populations and usage in international domains, measuring the soft power impact of language proves more difficult. Language functions simultaneously as a direct asset (enabling communication and cultural access) and as an enabler of other assets (facilitating educational exchange and cultural consumption). Disentangling these effects would require careful analytical work.

2.4 Understanding what works in practice

This study has established robust quantitative foundations for understanding soft power infrastructure and outcomes across 25 jurisdictions, revealing significant patterns about strategic effectiveness and efficiency. While the analysis demonstrates clear correlations between infrastructure characteristics and outcomes, understanding why particular approaches succeed in specific contexts and how they operate in practice would require further investigation.

3

Infrastructure

3.1 Introduction

Soft power infrastructure encompasses the institutional mechanisms, networks and platforms by means of which countries actively deploy their assets internationally to generate influence, attraction and cooperation. Infrastructure represents the bridge between domestic capabilities and international outcomes, transforming potential influence into actual engagement with organised activities and sustained presence.

Infrastructure requires deliberate investment, strategic planning and operational capacity to maintain effectiveness over time. Unlike assets, which may generate influence independently, infrastructure involves conscious projection activities designed to advance specific policy objectives or boost national reputation by means of sustained international engagement.

This section examines four dimensions of soft power infrastructure: policy frameworks and strategic coordination; resource allocation and funding models; geographical deployment patterns; and technological approaches including digital engagement strategies.

3.2 Policy frameworks and strategic coordination

3.2.1 Overview of national approaches

Systematic review of soft power policies across the 25 jurisdictions in this study reveals three distinct categories of strategic approach to international influence. These categories reflect varying degrees of policy formalisation, from comprehensive strategic frameworks to fragmented operational activities, providing insight into how different nations conceptualise and structure their soft power efforts.

The **first** category comprises fourteen jurisdictions with **explicit, documented soft power strategies or formal policy frameworks** that articulate clear objectives for international cultural and educational engagement. Australia, China, France, Germany, Indonesia, Japan, Kenya, Portugal, Russia, South Africa, Republic of Korea, Spain, the United Arab Emirates and the United Kingdom have established formal strategies that either explicitly reference soft power as a policy objective or embed cultural diplomacy within comprehensive foreign policy frameworks. These jurisdictions demonstrate institutional commitment via published strategy documents, dedicated coordination mechanisms, and measurable objectives linking cultural activities to broader national interests.

The **second** category includes three jurisdictions – Canada, India and Saudi Arabia – where **soft power policies are either emerging or under active development**. Canada is developing a cultural diplomacy strategy to complement its existing international engagement mechanisms. India's Parliamentary Standing Committee recommended creation of a formal soft power framework in December 2022, indicating political recognition of the need for strategic coordination despite current fragmentation. Saudi Arabia represents a unique case with its Vision 2030 (2017) and Cultural Vision (2019) documents, which, while not exclusively soft power strategies, explicitly incorporate cultural projection and international engagement as core components of national transformation.

The **third** category encompasses eight jurisdictions – Argentina, Brazil, the European Union, Italy, Mexico, Nigeria, Türkiye and the United States – that **lack single, coherent soft power policies despite maintaining substantial international cultural and educational activities.** These jurisdictions operate extensive programmes including cultural institutes, educational exchanges, and international broadcasting, but without overarching strategic frameworks explicitly connecting these activities to soft power objectives. The absence of formal policy does not indicate absence of activity or effectiveness. Rather, it reflects different institutional traditions, governance structures, or political priorities that have not yet produced unified strategic documents.

The United States represents a particularly complex case within this third category. Despite historically commanding the world's most extensive soft power infrastructure via State Department public diplomacy, USAID programmes, Fulbright exchanges and international broadcasting, the absence of a single coordinating strategy or institutional mechanism has contributed to fragmentation across multiple agencies operating under separate mandates. The 2025 retrenchment under the second Trump presidency, including the cessation of USAID as a standalone agency and constraints on Voice of America, has occurred without reference to any overarching soft power strategy, suggesting that institutional development has proceeded without sustained strategic direction.

The European Union similarly operates without a unified soft power framework, although for different structural reasons. Multi-level governance coordination by the European External Action Service (EEAS) produces sectoral strategies for culture, education, and development, but the European Union's institutional architecture and shared competencies with member states preclude a single comprehensive soft power policy comparable to those of nation-states.

Among jurisdictions with explicit policies, convergence emerges around core objectives despite varying political systems and cultural contexts. Most strategies emphasise projecting national identity and values, strengthening international partnerships, cultivating mutual understanding, and supporting economic objectives by means of cultural and educational exports. These are variously articulated as 'soft power' (UK, Republic of Korea), 'cultural diplomacy' (France, Germany), 'public diplomacy' (Australia, Japan) or else embedded within broader foreign policy concepts (Russia, China). While these jurisdictions have developed formal policy documents articulating soft power objectives, implementation reveals persistent challenges to strategic coherence. Even countries with explicit frameworks struggle with inter-agency coordination, resource alignment, and the gap between strategic intent and operational reality. The existence of policy documents has not necessarily translated into the institutional coherence or professional coordination that effective soft power projection requires.

This convergence extends to implementation mechanisms, with most explicit strategies incorporating diplomatic networks, cultural institutes, educational exchanges, international broadcasting, and digital engagement platforms. Despite rhetorical emphasis on coordination in policy documents, most jurisdictions continue in practice to operate soft power activities from traditional institutional silos with limited integration. Diplomatic, cultural, educational, and development programmes typically function via separate agencies with distinct mandates, budgets, and accountability structures, perpetuating fragmentation rather than achieving the strategic coherence that effective soft power projection requires.

The trajectory across the sample reveals no consistent pattern towards greater strategic coherence. While a few emerging powers are developing new frameworks and some middle powers show renewed interest in coordination, traditional soft power leaders are experiencing retrenchment, budget cuts, and continued fragmentation. The dominant pattern is divergence rather than convergence, with soft power's strategic priority varying dramatically based on national political dynamics, fiscal pressures, and changing conceptions of international engagement.

The variation in policy development across the sample reflects diverse institutional arrangements and governance structures, although the research cannot establish clear patterns linking these characteristics to policy effectiveness. Among the jurisdictions with explicit policies, both established democracies (United Kingdom, France, Germany) and emerging powers (United Arab Emirates, Saudi Arabia) have developed formal frameworks, whilst other established democracies (United States, Italy) continue without unified strategies. Federal structures show mixed outcomes. Germany demonstrates effective coordination using its tripartite institutional model, while other federal systems in the sample show varying degrees of fragmentation. Similarly, different governance systems demonstrate no consistent approach. Some authoritarian states maintain explicit policies (China, Russia) while others do not (Türkiye), and coordination challenges appear across all system types. These variations suggest that factors beyond constitutional structure or democratic tradition – including historical institutional development, political priorities, and resource availability – shape whether and how jurisdictions develop formal soft power strategies.

Reflecting these variations, the analysis indicates uneven evolution rather than convergence in national soft power strategies. Some countries – particularly emerging investors and high-efficiency actors – are elevating soft power to a strategic priority by means of new frameworks and expanded investment. Others, including several long-established cultural powers, face fragmentation, fiscal constraint or deliberate retrenchment. Overall, the evidence suggests that soft power's role within contemporary statecraft remains fluid and context-dependent, reflecting diverse institutional traditions rather than any universal movement towards centralised coordination.

3.2.2 Countries with implicit or emerging approaches

A subset of countries within the sample demonstrates significant soft power activity without comprehensive, published strategies. Their approaches are characterised less by the absence of engagement than by the lack of formal frameworks linking multiple instruments – cultural diplomacy, education, development cooperation and international broadcasting – within a unified strategic design.

In these cases, coordination occurs primarily via ministerial practice, administrative convention or longstanding institutional habit rather than formalised policy. Activities therefore evolve incrementally, shaped by sectoral priorities and historical legacies more than by strategic planning. The result is operational continuity without clear articulation of national objectives, leading to uneven coherence between policy intent and institutional delivery.

Countries developing emerging frameworks are moving to fill this gap by means of gradual codification. Canada's work towards a cultural diplomacy strategy exemplifies a whole-of-government approach linking cultural promotion with trade and foreign policy, while India's parliamentary recommendation for a dedicated soft power policy[2] demonstrates political recognition of the need for greater coordination. Both illustrate a transition from dispersed initiatives to more explicit strategic alignment.

[2] Parliamentary Committee on External Affairs, "India's Soft Power and Cultural Diplomacy: Prospects & Limitations – Sixteenth Report," presented to the Parliament of India, December 2022.

Other systems function using implicit coordination, where established institutions continue to operate with limited central direction. The United States remains the most prominent example. Despite its extensive network of public diplomacy, educational exchange and development programmes, recent restructuring has intensified fragmentation instead of producing renewed coherence. Similar patterns appear in several other democracies where strong institutional traditions coexist with weak cross-government mechanisms.

The European Union represents a distinctive variant. Its multi-level governance system prevents adoption of a single supranational soft power strategy, yet sectoral coordination by the EEAS and the European Union National Institutes for Culture (EUNIC) achieves partial integration. This hybrid arrangement demonstrates that coherence can arise from partnership and procedural alignment even without a unifying strategic document.

Collectively, these cases indicate that the evolution of soft power policy remains uneven. Many states continue to rely on incremental adaptation, institutional inertia and established professional networks rather than on comprehensive strategy-making. The persistence of implicit and emerging models underlines the diversity of contemporary soft power governance and cautions against assuming a universal movement towards centralised coordination.

Taken together, the explicit, emerging and implicit approaches described above reveal a diverse policy landscape in which the organisation of soft power remains highly path-dependent. The following subsection examines the underlying drivers and goals that shape these different models, identifying the political, economic and institutional factors that determine how governments define and deploy soft power within their broader foreign policy frameworks.

3.2.3 Key drivers and goals in existing policies

Across jurisdictions with explicit soft power frameworks, common drivers and objectives emerge, although with differing emphasis reflecting national context, governance tradition and strategic ambition.

Economic rationales feature prominently. Many governments now position soft power as an instrument for economic growth, market diversification and investment attraction. The UK Soft Power Council (SPC) and Australia's international education strategy explicitly link cultural and educational engagement to export earnings and job creation. Similar logics underpin Saudi Arabia's Vision 2030, the UAE Soft Power Strategy (2017) and China's cultural industries policies, which integrate international reputation-building with trade and tourism promotion. In these models, influence and economic modernisation reinforce one another.

Geopolitical positioning constitutes a parallel driver. States employ soft power policies to consolidate regional leadership or global visibility. Japan's cultural diplomacy supports Indo-Pacific cooperation and participation in global governance. India's nascent framework draws on civilisational narratives to strengthen regional partnerships. Russia, Türkiye and China link cultural projection to foreign policy reach and strategic communications. And the European Union frames cultural relations as an element of its external action identity.

Domestic political considerations increasingly influence the articulation of soft power policy, especially within democracies facing fiscal pressure or public scepticism towards international spending. Governments emphasise skills development, creative sector employment and regional economic benefit to demonstrate domestic returns on international engagement. This pragmatic justification has partially displaced earlier normative narratives of mutual understanding or global responsibility.

Reputational and counter-narrative goals appear strongly in countries seeking to reshape international perceptions or offset criticism. China's 'telling China's story well', Russia's 'sovereign communication', Türkiye's cultural diplomacy and Saudi Arabia's global branding initiatives all aim to influence narrative space and assert legitimacy. These strategies prioritise message control and image rehabilitation rather than attraction resulting from shared values.

Values and identity promotion remain important but are increasingly differentiated. Established democracies continue to reference democracy, rule of law and human rights, although these are often subordinated to economic and strategic aims. Emerging and non-Western actors emphasise cultural heritage, civilisational continuity or religious tolerance as markers of national distinctiveness. The resulting spectrum – from liberal-normative to heritage-centric approaches – illustrates how soft power discourse adapts to domestic ideology and external positioning.

Taken together, these drivers reveal that soft power strategies serve multiple, often overlapping purposes: stimulating economic opportunity, reinforcing geopolitical identity, managing reputation, and projecting values. The relative weight of each reflects national circumstance rather than a universal model, underscoring the contextual and contested character of soft power within contemporary statecraft.

The coexistence of these diverse drivers has direct implications for how governments organise and coordinate their soft power instruments. The following subsection examines the institutional arrangements by means of which states seek to integrate cultural, educational and diplomatic assets, and the extent to which such coordination assists – or constrains – their overall strategic effectiveness.

3.2.4 Policy coordination mechanisms

Effective soft power projection requires coordination across multiple government departments and between government and arm's length bodies, and in some cases with sub-state or non-state actors. The research reveals substantial variation in coordination mechanisms and their effectiveness (see Table 2).

Table 2: Soft power policy coordination mechanisms

Country	Coordination mechanism	Lead ministry/ agency	Accountability structure	Explicit strategy document
Argentina	Department within Ministry of Foreign Affairs	Ministry of Foreign Affairs – Public Diplomacy Department	Ministerial accountability	No
Australia	Departmental coordination through DFAT	Department of Foreign Affairs and Trade (DFAT)	Parliamentary oversight	Yes – Public Diplomacy Strategy
Brazil	Fragmented across multiple agencies	Ministry of Foreign Affairs (Itamaraty) – Cultural Diffusion Operations Division	Ministerial (fragmented coordination)	No
Canada	Departmental coordination (no whole-of-government mechanism)	Global Affairs Canada	Parliamentary oversight	Yes – Cultural Diplomacy Strategy (in development)
China	Centralised party–state coordination	Communist Party of China (CCP) Central Committee / Ministry of Foreign Affairs / State Council Information Office	CCP Central Committee oversight	Yes – Central Foreign Affairs Work Conference readouts (2023)
European Union	Multi-level governance coordination	European External Action Service (EEAS)	European Parliament oversight	No – sectoral strategies only
France	Ministry oversight with complex multi-agency infrastructure	Ministry for Europe and Foreign Affairs	Parliamentary and arm's length boards	Yes – Ministry strategic frameworks
Germany	Federal Foreign Office dialogue with agencies	Federal Foreign Office (Auswärtiges Amt)	Foundation/ association boards and Federal Foreign Office oversight	Yes – Federal Foreign Office strategic frameworks
India	Fragmented across multiple ministries (lacks formal inter-ministerial committee)	Ministry of External Affairs – Public Diplomacy Division	Parliamentary oversight (Standing Committee)	No – Parliamentary Committee recommended creation (December 2022)

Country	Coordination mechanism	Lead ministry/ agency	Accountability structure	Explicit strategy document
Indonesia	Ministry of Foreign Affairs multi-stakeholder coordination	Ministry of Foreign Affairs – Directorate-General of Information and Public Diplomacy	Ministerial accountability	Yes – Strategic Plan of DG Information and Public Diplomacy (2021)
Italy	Directorate-General coordination across ministries	Ministry of Foreign Affairs (MAECI) – Directorate-General for Public and Cultural Diplomacy	Ministerial and board governance	No – sectoral initiatives only
Japan	Ministry of Foreign Affairs oversight with agency consolidation	Ministry of Foreign Affairs (MOFA)	Parliamentary and independent agency boards	Yes – MOFA strategic frameworks
Kenya	Ministry coordination with multi-stakeholder colloquia	Ministry of Foreign Affairs – State Department for Foreign Affairs	Parliamentary oversight	Yes – Kenya Foreign Policy 2024 (launched December 2024)
Mexico	Council for Cultural Diplomacy (fragmented with significant challenges)	Secretaria de Relaciones Exteriores (Ministry of Foreign Affairs)	Ministerial (limited coordination)	No – Council framework but no comprehensive strategy
Nigeria	Ministry coordination (4D Diplomacy framework)	Ministry of Foreign Affairs	Parliamentry oversight (resource-constrained)	No – 4D framework but no published strategy
Portugal	Ministry oversight with Camões Institute implementation	Ministry of Foreign Affairs / Camões Institute	Ministerial oversight and board governance	Yes – Camões explicit strategy of external cultural relations
Republic of Korea	Inter-ministerial coordination under Act on Public Diplomacy	Ministry of Foreign Affairs	Legislative framework and Public Diplomacy Committee oversight	Yes – Act on Public Diplomacy (2016) / Master Plan (5-year)

Country	Coordination mechanism	Lead ministry/ agency	Accountability structure	Explicit strategy document
Russia	Ministry association with Rossotrudnichestvo (no interdepartmental coordination)	Ministry of Foreign Affairs / Rossotrudnichestvo	Presidential oversight (no public accountability)	Yes – Foreign Policy Concept (2013/2016)
Saudi Arabia	Recommendation for cross-govern-ment committee	Ministry of Foreign Affairs / Ministry of Islamic Affairs / Ministry of Culture	Council-based (recommended)	Yes – Vision 2030 (2017) / Cultural Vision (2019)
South Africa	Multiple coordination mechanisms (COMED / SACOIR)	Department of International Relations and Cooperation (DIRCO)	Parliamentary oversight	Yes – DIRCO Strategic Plan 2025–2030 / Public Diplomacy Strategy
Spain	Ministry coordination (historically fragmented between ministries)	Ministry of Foreign Affairs (MAEC) / Spanish Agency for International Developmental Cooperation (AECID)	Parliamentary oversight	Yes – Foreign Action Strategy 2021–2024 / Culture Plan 2020
Türkiye	Multiple coordinated institutions	Ministry of Foreign Affairs – General-Directorate of Promotion and Cultural Affairs	Board governance and ministerial coordination	No – institutional strategies but no single comprehensive document
UAE	Dedicated Soft Power Council (central coordinating body)	Ministry of Cabinet Affairs and the Future / Ministry of Foreign Affairs	Council-based governance	Yes – UAE Soft Power Strategy (2017)
United Kingdom	Soft Power Council (SPC) (advisory cross-departmental structure)	Foreign Commonwealth & Development Office (FCDO)	Parliamentary and arm's length boards	Yes – explicit soft power policy frameworks
United States	Fragmented inter-agency processes (lacks single coordination mechanism)	State Department / USAID / National Security Council (NSC) oversight	Congressional oversight	No – fragmented coordination

Germany's approach achieves coordination with clearly defined institutional mandates and sustained dialogue between the Federal Foreign Office and implementing agencies. Regular consultations and strategic planning processes enable alignment without direct ministerial control over programming. The success of this model reflects sustained political consensus across parties on the importance of cultural and educational diplomacy and appropriate institutional arrangements.

The UK SPC represents an explicit attempt to improve coordination by bringing together ministers from relevant departments with representatives from implementing agencies into a single structure, albeit one with an advisory remit. This model creates formal structures for strategic discussion and priority-setting, although its effectiveness remains difficult to assess given its recent establishment. The challenge lies in coordinating activities across departments with distinct mandates – foreign policy, trade promotion, cultural policy, education – while respecting the operational independence of arm's length bodies that derive credibility from distance from government.

Japan demonstrates coordination via the Ministry of Foreign Affairs' oversight of multiple implementing agencies, with the Japan International Cooperation Agency (JICA) operating as a unified implementing body for development cooperation that integrates cultural and educational programming. This consolidation reduces coordination challenges compared to systems where development cooperation, cultural diplomacy and educational exchange operate by means of entirely separate institutional structures.

France's coordination operates primarily via the Ministry for Europe and Foreign Affairs, which provides strategic direction to multiple implementing agencies. However, the complexity of French infrastructure – with Institut français, extensive Alliance française networks, Agency for French Education Abroad (AEFE – L'Agence pour l'enseignement français à l'étranger) schools and other bodies – creates coordination challenges despite formal oversight structures.

The United States lacks a single coordination mechanism comparable to with explicit policy frameworks, contributing to fragmentation across State Department public diplomacy, USAID, Peace Corps, Fulbright Programs and other initiatives. Coordination occurs via inter-agency processes and National Security Council (NSC) oversight of foreign policy priorities, but without systematic mechanisms specifically for soft power coordination.

Countries without explicit soft power policies typically lack dedicated coordination mechanisms, with cultural diplomacy, educational exchange and international broadcasting coordinated separately if at all. This fragmentation risks inefficiency resulting from duplication, missed opportunities for collaboration, and lack of strategic direction connecting activities to priority geographies or objectives.

3.2.5 Governance models and institutional arrangements

Governance arrangements for soft power differ widely, reflecting variations in political systems, administrative culture and institutional history. The analysis identifies five broad configurations observable across the sample.

- **Integrated network models** – typified by Germany, France and Japan – combine arm's length cultural agencies with formal coordination foreign affairs ministries. Germany's partnership of the Goethe-Institut, DAAD and GIZ under the Federal Foreign Office represents a mature example of delegated specialisation within a unified framework. France achieves comparable coherence with the Institut français and its diplomatic service, while Japan's Ministry of Foreign Affairs (MOFA) – Japan Foundation relationship links cultural diplomacy directly to foreign policy delivery.

- **Hybrid coordination systems** balance ministerial oversight with institutional autonomy. The UK SPC (2025) exemplifies this model, aligning the FCDO, DCMS, DBT, British Council and BBC World Service under shared strategic objectives. Comparable mechanisms operate in Australia and Republic of Korea, where inter-ministerial committees coordinate cultural, educational and media diplomacy. Canada and the United Arab Emirates also fall within this group. Both are developing cross-government structures to connect diverse cultural and economic actors while retaining sectoral independence.

- **Ministerial or directive systems** rely on direct coordination via the foreign ministry or an equivalent executive body. In Brazil, soft power is principally managed by Itamaraty by means of its cultural and educational divisions. Italy and Spain operate similar models, linking their ministry of foreign affairs MAECI–Istituti Italiani di Cultura and MAEC–Instituto Cervantes networks to diplomatic structures. Türkiye, India and Saudi Arabia also deploy cultural diplomacy using ministerial hierarchies, achieving coherence by administrative direction rather than by autonomous agencies.

- **Decentralised or plural network systems** persist in the United States, the European Union and Nigeria, where multiple agencies or institutions act independently under separate mandates. Coordination occurs largely by consultation and tradition rather than central authority. These arrangements offer flexibility but limit the capacity for unified priority-setting or impact evaluation.

- **Party-state/executive control systems,** exemplified by China and Russia, integrate cultural and information policy directly into the executive or ruling party apparatus. Soft power activity forms part of broader strategic communication agendas led by bodies such as China's State Council Information Office or Russia's Rossotrudnichestvo. These systems ensure coherence and resource concentration, but at the expense of institutional diversity and reputational openness.

Across all categories, institutional clarity and continuity of mandate appear more decisive in delivering impact than constitutional form. Where agencies possess stable budgets, professional capacity and effective channels for inter-agency communication, outcomes are measurably stronger. Conversely, overlapping responsibilities or fiscal volatility undermine performance even within ostensibly centralised frameworks.

The comparative evidence confirms that no single governance model guarantees success. Effective coordination depends on mandate clarity, professional capability and sustained political commitment rather than structural uniformity. These findings provide the foundation for the next subsection on accountability arrangements, which examines how evaluation and oversight mechanisms sustain – or constrain – strategic coherence over time.

The European Union represents a distinctive supranational variant combining elements of multiple models. Governance of international cultural relations operates as a result of shared competence between the EEAS and the European Commission under the framework established by the 2016 Joint Communication: 'towards an EU strategy for international cultural relations'. Delivery depends on networked partnership with national cultural institutes via EUNIC, which retains operational autonomy within EU-level coordination structures. This multi-level governance approach reflects the Union's broader institutional architecture, while creating unique coordination challenges absent from national systems.

Institutional arrangements and operating models

Beyond central governance, national operating models differ markedly in how soft power instruments are organised, financed and delivered. Three broad patterns emerge: networked agency systems, mission-integrated models, and partnership or contract-based approaches. These reflect not only administrative culture but also fiscal and diplomatic traditions.

- **Networked agency systems** characterise countries with established cultural institutes and scholarship agencies operating at arm's length from government but aligned by means of framework agreements or results-based contracts. Germany's Goethe-Institut, France's Institut français and the British Council exemplify this approach, maintaining global branch networks with delegated authority for programme design, staffing and partnership formation. Financial accountability is maintained by multi-year funding agreements and periodic strategic reviews, combining operational autonomy with ministerial oversight. This model offers continuity and credibility via institutional professionalism, although it can also generate inertia and high fixed costs.

- **Mission-integrated models** embed cultural, educational and media functions directly within diplomatic posts. This structure dominates in Brazil, Spain, Italy, Türkiye and India, where cultural attachés or embassy divisions manage exchanges and events under ambassadorial supervision. The model offers close links between policy and representation, but depends heavily on staffing levels and annual budgets, often limiting programme depth and responsiveness.

- **Partnership and contract-based models** operate where governments outsource delivery to universities, non-governmental organisations or private sector entities. Australia's New Colombo Plan, Canada's international education programmes and Republic of Korea's overseas culture initiatives illustrate this approach. It encourages innovation and cost-sharing, but requires strong contractual and monitoring frameworks to ensure alignment with foreign policy objectives. Hybrid arrangements are also common in the United Arab Emirates, where the Public Diplomacy Office commissions delivery by means of public–private partnerships aligned with national branding goals.

At the regional and multilateral level, the European Union provides a distinctive example of delegated operation using partnerships such as EUNIC Global and the EU National Institutes for Culture clusters. These mechanisms rely on pooled resources and co-branding rather than central control, enabling collective impact while respecting member state sovereignty.

Levels of arm's length autonomy

Across these operating models, institutions vary widely in their degree of operational freedom, the extent to which they can plan, implement and represent independently of government direction. Three broad tiers can be observed across the sample.

- **High-autonomy institutions** include long-established cultural agencies such as the Goethe-Institut, British Council, Institut français, and Japan Foundation. These bodies enjoy legal independence, maintain their own employment and procurement systems, and can form international partnerships without ministerial approval. They are bound by strategic frameworks or performance agreements but exercise substantial discretion in programme design, branding and local engagement. Their credibility often derives precisely from this perceived distance from government.

- **Moderate-autonomy institutions** operate within ministerial structures but retain limited delegated authority over budgets or content. Examples include Italy's Istituti Italiani di Cultura, Spain's Instituto Cervantes and Brazil's Itamaraty cultural divisions. They work via embassies and consulates, balancing professional expertise with diplomatic oversight. While more responsive to policy direction, their flexibility is constrained by administrative procedures and political turnover.

- **Low-autonomy institutions** function under direct executive or party control, with limited discretion over content or partnerships. China's cultural and media entities, Russia's Rossotrudnichestvo and Saudi Arabia's Vision 2030 Authority exemplify this category. These systems achieve high coordination and message discipline but face credibility and trust deficits in international perception, as the boundary between cultural engagement and strategic communication becomes indistinct.

Our analysis indicates a clear correlation between higher operational autonomy and reputational credibility, although not necessarily with policy reach. Arm's length institutions tend to maintain stronger international trust and continuity, whereas directive systems demonstrate faster mobilisation and greater alignment with state narratives. Best performance appears to depend on balancing autonomy with accountability by means of transparent governance and results-based funding.

Across all delivery systems, two structural variables remain decisive:

- the stability and predictability of funding flows; and
- the clarity of performance frameworks linking activities to policy objectives.

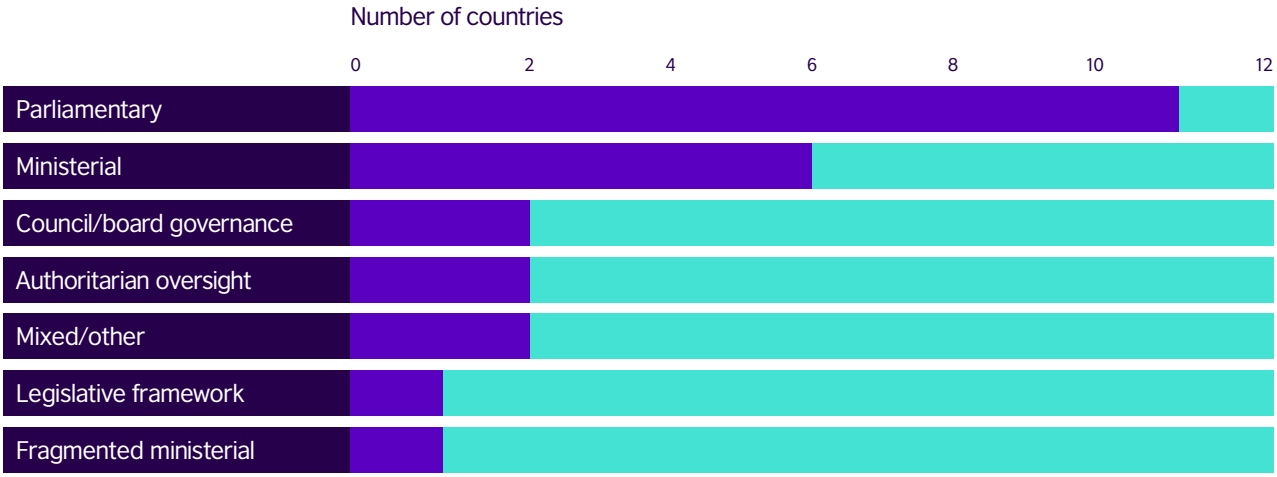
Countries combining autonomous delivery with results-based accountability – most notably Germany, France and the United Kingdom – demonstrate stronger long-term impact than those relying on ad-hoc or fully centralised operational control.

The comparative evidence from our analysis thus suggests that effective institutional design depends as much on the degree of operational freedom as on formal governance structure. The following subsection examines how accountability and evaluation mechanisms translate these institutional arrangements into measurable policy performance.

3.2.6 Accountability arrangements

Accountability mechanisms for soft power activities vary substantially across countries, reflecting different governance traditions and the varying prominence of soft power in national strategies (see Chart 1 below).

Chart 1: Accountability in sample countries



Where soft power features in explicit government strategies, accountability typically operates using standard government performance management systems. Ministers answer to parliaments for expenditure and outcomes, implementing agencies produce annual reports documenting activities and reach, and periodic reviews assess strategic effectiveness.

Some countries explicitly reference international soft power indices in their strategic planning and accountability frameworks. The UK government has referenced the Soft Power 30 Index (one of the 15 indices used in this analysis) in ministerial statements and parliamentary debates, while the Australian Department of Foreign Affairs and Trade monitors the Lowy Institute Global Diplomacy Index (also used in this study) alongside other performance metrics. Republic of Korea's Ministry of Culture, Sports and Tourism tracks the nation's position in the Brand Finance Nation Brands index and Anholt-Ipsos Nation Brands Index as measures of the Korean Wave's impact. However, the proliferation of competing indices with different methodologies creates challenges for systematic accountability, as countries can selectively cite indices showing favourable results rather than establishing consistent performance measures. The challenge across all systems lies in measuring soft power outcomes in ways that demonstrate meaningful influence rather than simply tracking activities and reach.

However, the long-term nature of soft power effects, where investments may take years or decades to generate influence, complicates accountability, as demonstrating causal links between specific activities and measurable outcomes proves challenging.

The UK system combines ministerial accountability to Parliament with arm's length agency governance by boards and trustees. The British Council operates under Royal Charter with an independent board, producing annual reports and accounts while pursuing strategic objectives agreed with government. This model balances autonomy with accountability, although tensions can arise between commercial imperatives (revenue generation from English language services) and strategic priorities (activities in markets where commercial sustainability proves difficult).

Germany's implementing agencies operate with substantial autonomy under foundation or association structures, with oversight provided by boards and regular discussion with the Federal Foreign Office. Accountability emphasises adherence to agreed strategic frameworks rather than detailed ministerial control over programming decisions.

Countries with less developed soft power policies often lack systematic accountability mechanisms specifically for soft power outcomes. Cultural institutes, educational exchange programmes and international broadcasting may report using separate departmental structures without consolidated assessment of cumulative soft power impact. This fragmentation makes strategic assessment difficult and complicates decisions about resource allocation across different instruments.

The challenge across all systems lies in measuring soft power outcomes in ways that have meaning. Traditional metrics such as numbers of students, cultural events delivered, broadcast audiences, etc., record activities and reach but not actual influence on target audiences. More sophisticated approaches attempt to track reputation changes, policy influence or relationship development, but attributing these outcomes to specific soft power investments rather than broader factors remains methodologically complex. This measurement challenge affects accountability regardless of governance structures, as demonstrating value for money and strategic effectiveness requires evidence that soft power activities generate intended influence effects, not merely processes and outputs. There is a need for evaluation approaches that meet this fundamental challenge.

3.3 Resources and funding models

The scale and structure of resource allocation for soft power activities varies substantially across the 25 jurisdictions studied, reflecting different strategic priorities, economic capacities and institutional arrangements. This section examines overall investment levels, funding models and the balance between government appropriations and self-generated income.

3.3.1 Overall investment levels

Comparison of soft power spending across countries presents methodological challenges.[3] Different countries categorise expenditure differently, with some maintaining consolidated budgets for cultural diplomacy, while others disperse funding across multiple departments and agencies. Exchange rate fluctuations, purchasing power variations and different accounting standards further complicate direct comparison. Nevertheless, the available data reveals substantial variations in both absolute spending levels and spending relative to total government expenditure.

[3] Methodological notes and caveats:
- All totals shown in following tables are given to nearest £bn.

Table 3 and Chart 2 on pages 38 and 39 illustrate the total estimated annual soft power spending for a selected group of major countries. This subset – China, the United States, Germany, the United Kingdom, France, Japan, Canada, Australia, and Republic of Korea – was chosen from the wider sample of 25 jurisdictions analysed in the report because they represent the most transparent, data-rich, and policy-significant examples of national investment in soft power infrastructure. Each maintains distinctive institutional systems and longstanding international engagement models that allow reasonably robust financial comparison. The purpose of presenting spending for this smaller group is to highlight broad scale differences rather than detailed budget composition, showing how resource magnitude varies across the leading global and middle-power actors that shape the contemporary soft power landscape. The most recent publicly available figures were converted to pounds sterling at October 2025 exchange rates.[4]

- **Cultural diplomacy and education:** Includes language institutes, cultural centres, educational exchange programmes, artist residencies, and cultural programming abroad. Many institutions (particularly British Council, Goethe-Institut, Alliance française) generate significant self-funded income from language courses and examinations. Figures include both state funding and self-generated revenue to reflect total operational capacity.

- **Development cooperation:** Figures represent estimated soft power-relevant portions of total Official Development Assistance (ODA). Not all development spending functions as soft power (e.g., emergency humanitarian relief), but substantial portions – particularly capacity-building, educational programmes, and infrastructure cooperation – generate influence alongside developing mental impact. Conservative estimates are used.

- **International broadcasting:** State-funded international media services including television, radio, and digital platforms. Some services (particularly BBC World Service, Deutsche Welle) maintain editorial independence despite state funding.

[4] Sources: United States - U.S. Department of State Congressional Budget Justification FY2024 and USAID FY2024 Budget; United Kingdom - British Council Annual Report 2023-24 and FCDO Supplementary Estimate Memorandum 2023-24; Germany - Auswärtiges Amt Haushalt 2024 and BMZ Budget 2024; France - Ministère de l'Europe et des Affaires étrangères, Projet de loi de finances 2024; Japan - Ministry of Foreign Affairs Budget 2024 and JICA Annual Report 2023; China - estimates based on Ministry of Education reported spending and Belt and Road Initiative tracker data (American Enterprise Institute); Republic of Korea - Ministry of Culture, Sports and Tourism Budget 2024 and KOICA Annual Report 2023; Canada - Global Affairs Canada Departmental Plan 2023-24; Australia - DFAT Budget Statements 2023-24. Development cooperation figures represent total bilateral and multilateral ODA, of which soft power-relevant spending represents a substantial but not precisely quantifiable portion.

- **US figures caveat:** United States data reflects pre-2025 budget levels. The Trump administration implemented substantial reductions to USAID programmes and international broadcasting from February 2025 onwards. Actual 2025 spending is estimated to be 25 to 35 per cent lower than the figures shown.

- **China estimation challenges:** Chinese soft power spending involves multiple agencies with limited transparency. Belt and Road Initiative (BRI) figures include only estimated soft power-relevant portions of larger infrastructure and lending programmes. Cultural programme estimates are based on publicly announced Confucius Institute funding and observable cultural centre operations.

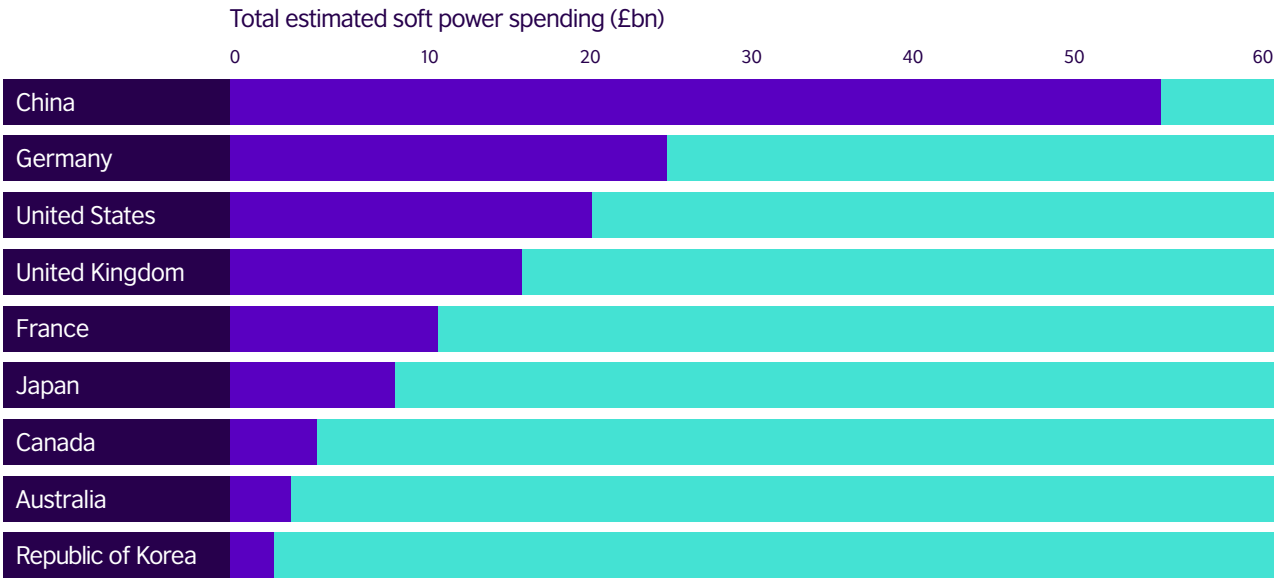
- **Data currency:** The most recent publicly available data is used for each country, typically FY2023 – 24 or calendar year 2024. Some figures represent budgeted rather than actual spending.

Table 3: Soft power spending by country[5]

Country	Cultural diplomacy & education (£bn)	Development cooperation (£bn)	International broadcasting (£bn)	Total power spending (£bn)
China	2.00	52.00	0.88	54.88
Germany	1.80	23.00	0.25	25.05
United States	1.60	19.00	0.15	20.75
United Kingdom	1.30	15.00	0.32	16.62
France	1.50	10.00	0.21	11.71
Japan	0.38	8.50	0.38	9.26
Canada	0.82	3.90	0.20	4.92
Australia	0.61	2.30	0.16	3.08
Republic of Korea	0.27	2.20	0.11	2.58

[5] Verified data based on official budget documents, annual reports, and publicly available financial data from government ministries and implementing agencies. Includes detailed breakdown by spending category. This level of credible, reliable detail was not available for all 25 jurisdictions.

Chart 2: Soft power spending by country



Institutions included in estimated annual soft power spending totals (2025)

Table 4 on page 40 (see overleaf) lists the principal institutions whose budgets were included in the calculation of estimated annual soft power spending for each country. It covers core cultural, educational, broadcasting and development agencies operating internationally under government mandate or public funding. Figures represent consolidated totals where available, with indicative allocations based on official sources and verified public accounts.[6]

[6] Where agency budgets overlap across development, cultural or educational mandates, expenditure has been apportioned to avoid double-counting, using the most recent disaggregated data from official financial statements and international reporting sources.

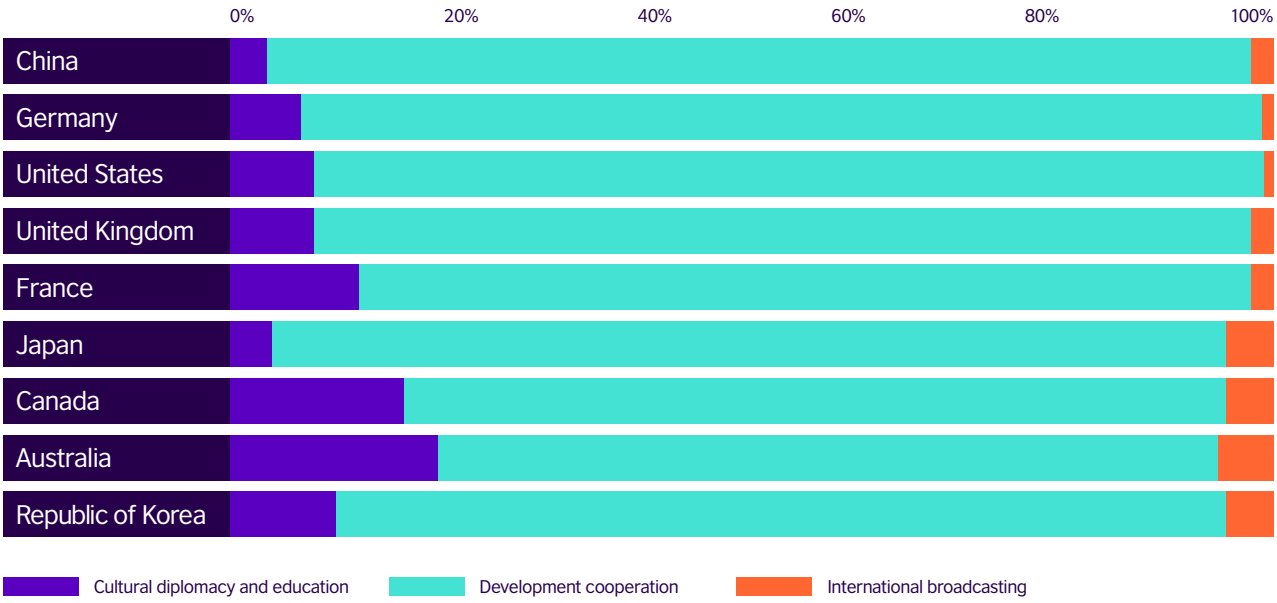
Table 4: Institutions included in estimated annual soft power spending totals (2025)

Country	Institutions and programmes included in totals
China	Confucius Institutes and cultural centres (under the CIEF – Chinese International Education Foundation) Ministry of Education international exchange programmes Ministry of Culture and Tourism global promotion budget BRI (Belt and Road Initiative) (development finance component used for international cooperation) CGTN and China Radio International (under China Media Group)
Germany	Goethe-Institut DAAD (German Academic Exchange Service) Alexander von Humboldt Foundation Federal Foreign Office cultural relations budget BMZ (Federal Ministry for Economic Cooperation and Development) GIZ (Deutsche Gesellschaft für Internationale Zusammenarbeit) Deutsche Welle
United States	U.S. Department of State Bureau of Educational and Cultural Affairs Fulbright Program Smith-Mundt and related public diplomacy funds USAID (development cooperation; post-2025 reductions reflected) Voice of America and U.S. Agency for Global Media (post-cuts) Radio Free Europe/Radio Liberty Peace Corps (included under development cooperation)
United Kingdom	British Council (grant-in-aid and self-generated income) FCDO public diplomacy and development cooperation (ODA at 0.5% gross national income – GNI) BBC World Service Wilton Park conferences Scholarship schemes (Chevening, Commonwealth)
France	Institut français Alliance française network AEFE (Agency for French Education Abroad) Ministry for Europe and Foreign Affairs cultural budget Agence Française de Développement France Médias Monde (RFI, France 24)
Japan	Japan Foundation Ministry of Foreign Affairs cultural exchange budget (Includes Japan Houses) JICA (Japan International Cooperation Agency) NHK World (international branch of Japan Broadcasting Corporation) Cabinet Office public diplomacy funds
Canada	Global Affairs Canada (Cultural and Public Diplomacy Division) Canadian Heritage international cultural programme Canada Council for the Arts (International Outreach grants) International Development Assistance Envelope (IDAE) Radio Canada International
Australia	Department of Foreign Affairs and Trade (DFAT) public diplomacy programme Australia Council for the Arts Screen Australia international promotion DFAT ODA programmes ABC Australia and SBS World News International
Republic of Korea	Korea Foundation Ministry of Culture, Sports and Tourism (K-culture programmes) Korea International Cooperation Agency (KOICA) Korea Creative Content Agency (KOCCA) Korean Cultural Centres Arirang TV KBS World

Soft power spending by category (2025)

Chart 3 summarises estimated annual soft power expenditure by major spending categories, distinguishing between cultural and educational engagement, international broadcasting, development cooperation and related diplomatic programmes. Figures are rounded estimates derived from official budget data and comparable international sources.

Chart 3: Soft power spending by category of spend



Several patterns emerge from this comparative data.

- **Scale and distribution of spending:** The analysis shows a clear hierarchy in global soft power investment, with China, Germany and the United States (even after 2025 reductions) in the lead. China's estimated annual spending of over £56 billion reflects the inclusion of BRI-related development finance, which dwarfs the cultural and broadcasting elements of its soft power portfolio.

- **ODA dominance:** Across the sample, ODA constitutes the largest single component of soft power expenditure, often exceeding 80 per cent of total spend. This highlights how development cooperation remains the principal channel by means of which states project influence and build long-term international relationships.

- **Cultural and educational investment:** Cultural and educational investment remains a cornerstone of soft power projection, with institutions like the Goethe-Institut, British Council and Institut français continuing to serve as the most visible national instruments, particularly for Germany, the United Kingdom, and France. These organisations integrate cultural, linguistic, and educational outreach within coherent national frameworks. Despite their strategic importance, aggregate spending across the sample declined by approximately six to eight per cent in real terms between 2020 and 2025, adjusted for inflation and exchange rates. This reduction reflects post-covid fiscal consolidation pressures and the political reprioritisation of domestic budgets, most notably in the United Kingdom, France, and Japan. Since 2023, while absolute spending has stabilised, most countries continue to face budgetary constraints rather than significant reinvestment in cultural diplomacy programmes (see Table 5).

- **Broadcasting as a reputational tool:** International broadcasting represents a modest but strategic component of total spending, generally below £1 billion per country. Outlets such as BBC World Service, Deutsche Welle, France Médias Monde, and China Global Television Network (CGTN) play a critical role in shaping narratives and maintaining information presence, although their budgets are small relative to development and cultural expenditure.

- **Asymmetries in spending profile:** The United Kingdom and France exhibit a more balanced soft power portfolio across ODA, cultural, and media components, while China and the United States display an extreme skew towards development finance. By contrast, Japan, Canada, Australia, and Republic of Korea invest far smaller sums overall, but they sustain distinctive reputational advantages by means of targeted programmes in culture, education and content industries.

- **Implications for strategic positioning:** The data underlines the strategic value of integrated soft power ecosystems that link culture, education, and development cooperation. Countries that can align these pillars under a coherent international strategy – rather than rely on singular instruments – are likely to achieve more resilient and trusted forms of influence.

European countries tend to invest more heavily than most other countries in the sample. This reflects sustained political commitment to cultural diplomacy and development cooperation as foreign policy instruments.

The United States historically commanded the largest absolute spending but, as noted above, experienced dramatic reductions in 2025, particularly affecting USAID programmes and international broadcasting.

China makes a substantial investment in soft power infrastructure, although its effectiveness relative to spending appears more limited than for established democracies, suggesting that resource scale alone cannot guarantee influence without strategic coordination and credibility.

Japan channels substantial resources via development cooperation, with JICA's annual spending exceeding that of many countries' entire soft power budgets. This reflects Japan's distinctive approach of integrating cultural programming into development projects rather than operating separate cultural diplomacy structures. Republic of Korea's spending appears more modest in absolute terms, but it generates substantial impact from effective control of private sector cultural production, demonstrating that efficiency matters alongside scale.

Several middle powers – Canada, Australia, Spain, Italy – maintain significant soft power investments relative to their economic size, reflecting recognition of cultural diplomacy's importance for countries lacking the hard power resources of larger nations. Conversely, some major economies in the sample demonstrate limited investment in systematic soft power infrastructure despite substantial underlying assets, suggesting that policy prioritisation represents a constraint independent of economic capacity.

Table 5: National budgets for cultural diplomacy, public diplomacy, and major international cultural relations institutions[7]

Country	National budget 2025 (£m)	% Change since 2024	Direction
Argentina	No data	No data	No data
Australia	~163.00	+3.7%	▲
Brazil	No data	No data	No data
Canada	668.00	–3.6%	▼
China	14,703.00	+8.4%	▲
European Union	290.60	+1.5%	▲
France	578.00	–6.3%	▼
Germany	223.90	–7.6%	▼
India	3.54	+7.6%	▲
Indonesia	50.00–100.00	No data	No data
Italy	341.90	+6.7%	▲
Japan	1,393.00	+8.4%	▲
Kenya	160.00–200.00	No data	No data
Mexico	25.00–50.00	No data	No data
Nigeria	150.00–200.00	41.9%	▲
Portugal	149.60	+25.0%	▲

Country	National Budget 2025 (£m)	% Change since 2024	Direction
Republic of Korea	5,176.00	+1.1%	
Russia	44.00–76.00	~+10%	
Saudi Arabia	54,167.00	+1.6%	
South Africa	308.00	+2.0%	
Spain	241.40	0.0%	No change
Türkiye	250.00–300.00	~+20-25%	
UAE	5,929.00	+4.3%	
UK	163.10	+1.0%	
USA	1,471.00	0.0%	No change

3.3.2 Funding models and sustainability

Countries employ varying funding models for soft power infrastructure, with implications for institutional autonomy, strategic coherence and long-term sustainability.

The predominantly government-funded model characterises most countries in the sample. Cultural institutes, educational exchange programmes and international broadcasting receive annual appropriations from normal budget processes. This approach provides democratic accountability via parliamentary oversight, but creates vulnerability to political shifts and fiscal pressures. Germany's Goethe-Institut, France's Institut français and Japan's JICA operate primarily with government grants, although with varying degrees of operational independence from direct ministerial control.

[7] These figures are not comprehensive soft power spending totals, which would include ODA, international broadcasting, and other components. This data also comes with two further important caveats. First, budgetary transparency varies very considerably by jurisdiction, if the information is available at all. Second, what precisely is (or is not) included under the banner of 'cultural diplomacy, public diplomacy or major soft power institution' is a matter open to a significant level of interpretation and judgement.

The hybrid funding model combines government grants with substantial self-generated income. The British Council exemplifies this approach, generating over 80 per cent of its income from a combination of English language teaching and examination services, tendered contracts, partnerships, and other self-generated activities, while pursuing strategic priorities in cultural relations and educational partnerships supported by grant-in-aid. This model provides revenue stability and reduces fiscal pressure on government, but it creates tensions between commercial imperatives and strategic priorities, particularly regarding resource allocation to markets where strategic importance is high but commercial sustainability proves difficult.

Republic of Korea's model emphasises enabling private sector success by means of strategic government facilitation rather than large-scale direct government funding of cultural programmes. Government agencies provide infrastructure support, including trade promotion, copyright protection, and market access negotiation, while allowing creative industries substantial autonomy. This approach has generated remarkable soft power gains from the Korean Wave at relatively modest direct government cost, demonstrating efficiency from public – private coordination.

The sustainability challenge affects all funding models but manifests differently. Predominantly government-funded systems face pressure during fiscal constraint periods, with cultural diplomacy and development cooperation competing with domestic priorities for limited resources. Recent years have seen pressure on soft power budgets across multiple countries in the sample, as governments prioritise post-pandemic recovery and respond to domestic political demands for spending restraint.

Hybrid models provide some insulation from fiscal pressure by means of revenue diversification but face different sustainability challenges. Commercial activities require continuing investment in quality and innovation to maintain competitiveness, while strategic priorities may not align with commercial opportunities. The British Council's experience demonstrates both the benefits and tensions of this model, with substantial revenue generation enabling programme sustainability while creating governance challenges concerning balancing commercial and strategic objectives.

3.3.3 Resource allocation priorities

Beyond overall spending levels, how countries allocate resources across different soft power instruments reveals strategic priorities and coordination effectiveness.

Germany has experienced a notable contraction in its soft power budget, declining by 7.56 per cent since 2024 to £223.90 million in 2025.[8] This reduction has necessitated significant institutional restructuring, particularly affecting the Goethe-Institut, Germany's flagship cultural diplomacy organisation, alongside reductions at the DAAD. These cuts represent a departure from Germany's traditionally consistent investment in cultural and educational diplomacy, and come at a time when the country has otherwise been recognised as the most efficient soft power performer in the comparative analysis. The restructuring raises questions about whether Germany can maintain its leading position in soft power effectiveness while operating with reduced resources.

France has similarly reduced its soft power budget by 6.27 per cent since 2024, bringing total spending to £578.00 million in 2025.[9] The cuts have particularly affected the Institut français and have affected the extensive Alliance française network, which represents one of France's most distinctive soft power assets with its global presence across multiple countries. These reductions compound the fiscal pressures France already faces in maintaining its costly worldwide cultural infrastructure, and suggest that even established soft power leaders with decades of institutional investment are not immune to budget constraints. The French cuts reflect broader tensions between sustaining comprehensive global presence and managing domestic fiscal pressures in the post-pandemic economic environment.

A recurring theme of this report is change in the United States, which historically allocated substantial resources to development cooperation via USAID, with more modest investment in public diplomacy and educational exchange relative to overall foreign policy spending. The dramatic spending reductions in 2025 disproportionately affected USAID and international broadcasting. The US government chose to cut these programmes substantially while maintaining other foreign policy expenditures, indicating a shift in how the administration valued different instruments of international engagement.[10] Whether this reflects considered assessment of strategic effectiveness, political targeting of specific institutions, or broader ideological opposition to certain forms of international engagement remains a matter of interpretation beyond what the expenditure data alone can demonstrate.

[8] Goethe-Institut (2023). Beschliesst Umfassende Transformation. Available at: https://www.goethe.de/de/uun/prs/pma/p23/goethe-institut-beschliesst-um.html; DAAD. (2024). Jahresbericht 2023/2024. Bonn: DAAD. Budget figures from Auswärtiges Amt Haushalt 2024 and 2025.
[9] Ministère de l'Europe et des Affaires étrangères (2024) Budget 2024–2025: Rapport annuel de performance. Paris: MEAE. Institut français and Alliance française network funding detailed in Programme 185.
[10] US Department of State (2025) Executive Order 14173: Reevaluating and Realigning United States Foreign Aid. Federal Register, vol. 90, no.15, pp. 6841–6845. Voice of America administrative leave detailed in US Agency for Global Media press releases, March 2025.

Japan's resource allocation heavily emphasises development cooperation, with JICA commanding resources substantially larger than spending on other soft power instruments. However, Japan does maintain dedicated cultural diplomacy infrastructure by means of the Japan Foundation and diplomatic cultural although, though at a smaller scale than JICA's development operations. The relationship between Japan's development cooperation and cultural diplomacy represents historical institutional development rather than necessarily a deliberate strategic choice to substitute one for the other. Whether Japan views development cooperation as inherently more effective for influence generation than cultural institutes, or whether the spending patterns reflect other factors including domestic political constituencies, bureaucratic structures, and post-war institutional development, would require further research.

China's resource allocation to soft power infrastructure proves difficult to assess comprehensively due to limited transparency in government spending data and the integration of soft power activities across multiple agencies and programmes. Available evidence suggests substantial investment in physical cultural infrastructure (Confucius Institutes before restructuring, cultural centres) and international broadcasting (CGTN, China Radio International). The BRI involves huge financial commitments, although characterising BRI primarily as a soft power investment oversimplifies a complex programme combining infrastructure development, commercial interests, strategic positioning and diplomatic objectives. The opacity of Chinese government budgeting, the difficulty of distinguishing soft power spending from other foreign policy expenditures, and the challenges of accessing reliable data on programmes operating across numerous ministries mean that any characterisation of Chinese resource allocation patterns remains necessarily provisional and based on incomplete information.

3.3.4 Patterns in the comparative data

Several significant patterns emerge from this comparative analysis of soft power spending across the sample countries, revealing strategic choices and structural constraints that shape contemporary soft power projection.

European commitment to soft power infrastructure remains prominent in the comparative data, although this commitment is now under increasing fiscal and political pressure. Germany, the United Kingdom and France continue to maintain substantial annual spending, estimated at approximately £27 billion, £17 billion and £12 billion, respectively. Germany's investment has remained comparatively stable since 2023, while France's cultural and development budgets have contracted slightly in real terms. The United Kingdom's total has fallen more sharply following the reduction of ODA from 0.7 per cent to 0.5 per cent of GNI in 2021 – representing an annual decrease of around £4 billion. Despite these pressures, the three principal European powers continue to sustain levels of soft power investment that exceed those of most other democracies with transparent reporting systems.

Development cooperation dominance in overall spending deserves particular attention. Across nearly all countries in the sample, development cooperation budgets substantially exceed spending on cultural diplomacy and international broadcasting combined. However, development cooperation serves multiple objectives beyond soft power generation, including poverty reduction, humanitarian assistance, economic development and fulfilling international commitments. While development programmes can generate soft power effects as a result of relationship building and demonstrating national values, characterising ODA spending primarily as soft power investment conflates distinct policy objectives. The extent to which countries consciously integrate soft power considerations into development cooperation design and delivery, rather than treating any positive relationship effects as secondary benefits, varies substantially across the sample and remains difficult to assess from the available data. Recent policy commentary has increasingly characterised reductions in ODA spending as cuts to soft power infrastructure, although this framing reflects particular analytical perspectives on the relationship between development cooperation and international influence rather than representing consensus about ODA's primary purpose.

The remarkable variation in spending efficiency becomes evident when comparing absolute investment levels against outcome scores presented in Section 4 Outcomes of this report. Germany achieves the highest outcome score (74.97) with total spending of approximately £25 billion, while China invests more than double this amount (£56+ billion) but achieves significantly lower effectiveness due to credibility challenges and institutional fragmentation. Republic of Korea demonstrates extraordinary efficiency, generating substantial soft power gains from the Korean Wave with total spending of only £2.6 billion – less than one-tenth of Germany's investment. These patterns confirm that strategic coherence, institutional quality and cultural resonance matter far more than resource scale alone in determining soft power effectiveness.

The vulnerability of soft power budgets to political change emerges starkly from the American experience. The United States historically commanded the largest absolute soft power spending globally, yet made dramatic reductions during 2025 that fundamentally altered its institutional capacity. As noted above, the cuts disproportionately affect USAID and international broadcasting, precisely the instruments which require sustained long-term investment to build credibility and relationships. This pattern suggests that soft power infrastructure remains vulnerable without robust cross-party political consensus and institutional arrangements that insulate programmes from short-term political pressures.

The hybrid funding model's distinctive position deserves particular attention. The United Kingdom stands alone among major soft power actors in operating a model where the primary cultural relations organisation (the British Council) generates approximately 75 per cent of its revenue commercially while pursuing strategic priorities supported by government grants. This creates both advantages – reduced fiscal pressure on government, revenue stability, market discipline – and challenges concerning balancing commercial imperatives with strategic priorities. No other country in the sample has replicated this model successfully at comparable scale, suggesting either distinctive UK advantages (particularly the global demand for English language teaching) or potential lessons about the tensions inherent in mixing commercial and strategic objectives.

The credibility constraint on effectiveness appears consistently across the data. China's substantial investment of over £56 billion, which is more than any country except the United States at its pre-2025 peak, generates limited soft power conversion relative to spending. Similarly, Gulf states pursuing ambitious soft power programmes face reception challenges despite considerable resource commitment. These patterns reinforce the observation that soft power effectiveness requires not merely institutional presence and financial investment, but also fundamental credibility and alignment with target audience values. These are factors that cannot be purchased with budget increases alone, and may require longer-term policy approaches dealing with underlying concerns about governance and international behaviour.

These patterns collectively suggest that contemporary soft power effectiveness depends less on absolute resource levels than on strategic coherence, institutional quality, sustained political commitment and fundamental credibility. Influence accumulates gradually with consistent engagement rather than episodic campaigns or rapid infrastructure expansion.

3.4 Geography and deployment patterns

The geographical distribution of soft power infrastructure reveals strategic priorities, resource constraints and varying approaches to achieving international influence. This section of the report examines how countries deploy their cultural, educational and diplomatic resources across receiving countries, the patterns of concentration and dispersion that emerge, and the strategic choices underlying these deployment decisions.

3.4.1 Approaches to global presence

Countries employ fundamentally different approaches to establishing presence in global soft power projection. These approaches reflect varying resource capacities, institutional traditions and operational priorities.

Embassy and diplomatic network-based approaches integrate cultural programming within existing diplomatic missions to achieve broad geographical coverage while maintaining unified governmental coordination. This model prioritises reach over depth, although the quality and depth of engagement varies considerably. Some countries operate sophisticated cultural programming via embassies (Canada's cultural diplomacy in Europe, Republic of Korea's targeted festival participation at events like the Edinburgh Festival), while others maintain only minimal cultural presence. The model enables countries to maintain some cultural visibility across numerous territories without the expense of dedicated cultural infrastructure, although typically with less sustained local institutional presence than dedicated cultural centres provide.

Traditional cultural institute models establish dedicated cultural centres and educational institutions that operate with varying degrees of independence from diplomatic missions, enabling specialised cultural and educational programming with deeper local engagement.

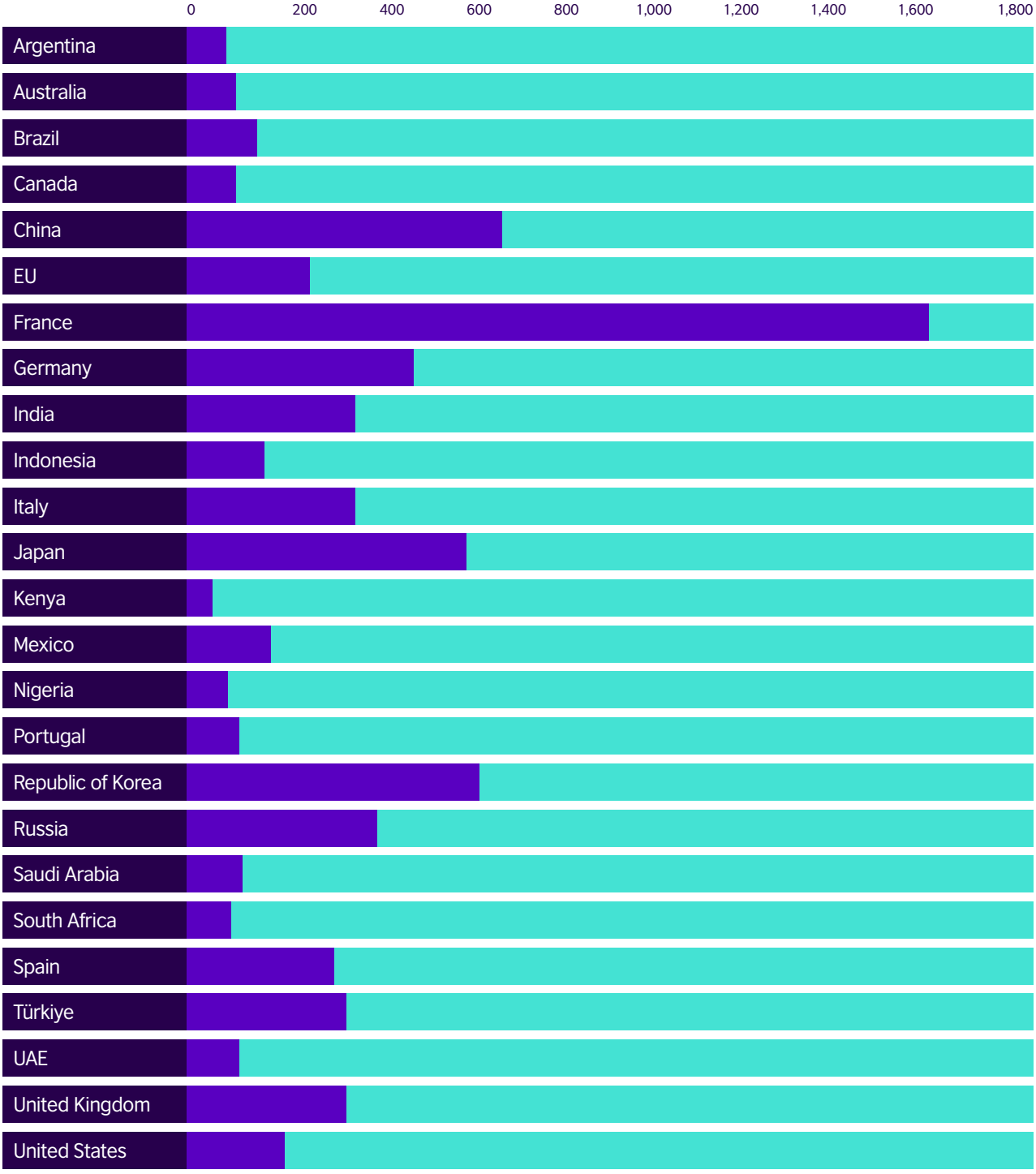
Broadcast-based strategies use international media outlets, digital platforms and remote content delivery to achieve global reach without requiring extensive physical infrastructure. This approach enables cost-effective reach, but often produces more limited local institutional presence and relationship-building capacity. The model has become more significant with digital technology development, enabling countries to achieve audience reach that would require prohibitive investment in physical infrastructure alone.

These different strategic approaches reflect varying resource capacities, institutional traditions and operational priorities, with some countries combining multiple models, while others concentrate resources within single approaches. The choice of spatial strategy significantly influences both geographical coverage patterns and the intensity of institutional presence within target markets.

3.4.2 Overall institutional deployment by sending countries

Analysis of global institutional deployment reveals significant variations in both sending country capacity and strategic approaches to geographical coverage (see Chart 4 below). It should be noted that the 2025 study employs a broader definition of 'institution' than the 2023 research, which accounts for substantial numerical increases for several countries. The expanded methodology now includes educational partnership programmes, field offices, and distributed learning centres that were excluded from the 2023 count, which focused primarily on formal cultural centres and diplomatic missions.

Chart 4: Total number of institutions by country



France maintains the most extensive global institutional presence of any country, with 1,575 institutional locations across multiple programme types, representing more than double any other country's deployment. This comprises 96 Institut français locations, 832 Alliance française centres, 522 AEFE schools, 98 French international schools (non-AEFE), and 27 other cultural/educational institutions. The French network spans 141 countries, demonstrating commitment to maintaining presence across both priority markets and territories where strategic returns may be more limited.

China ranks second with 674 total institutions globally, although this represents a significant reduction from earlier years following the Confucius Institute restructuring from 990 to 459 locations between 2024 and 2025. This 54 per cent reduction followed both international pressure and actions by Western countries against Confucius Institutes, alongside strategic rebranding under the CIEF. Despite the numerical decline, China maintains geographical breadth across 141 countries, with the highest remaining concentrations in the United Kingdom, Republic of Korea and Russia. The restructuring suggests that scale alone cannot guarantee effectiveness when credibility challenges or political opposition limit programme acceptance.

Republic of Korea demonstrates remarkable institutional expansion with 621 institutions, closely followed by Japan with 594 institutions, indicating substantial Asian investment in international cultural and educational programming.[11] Republic of Korea's expansion reflects both genuine network growth driven by Korean Wave success and the 2025 methodology's inclusion of Sejong Institutes (256 locations) and distributed educational programmes (331 locations), alongside the Korea Foundation (7 locations) and Korean Cultural Centres (35 locations). On a like-for-like basis comparing only cultural centres and foundations, Republic of Korea's network expanded from 42 locations (2023) to approximately 90 locations (2025), representing genuine growth of approximately 114 per cent. Japan's figures similarly reflect methodological expansion, now including JICA field offices and project sites (437 locations), alongside Japan Foundation offices (24 locations) and supported institutions (133 locations). Comparing only cultural institutions, Japan's network grew from 29 locations (2023) to approximately 160 locations (2025), representing growth of approximately 450 per cent, partly reflecting Japan's distinctive approach of integrating cultural programming into development cooperation infrastructure.

[11] The 2025 methodology employs a broader definition of 'institution' than the 2023 study. The 2023 research focused primarily on formal cultural centres, diplomatic cultural facilities, and headquarters/regional offices of major cultural organizations. The 2025 study expands this to include: (a) distributed language learning centres and educational partnership programmes (e.g. Sejong Institutes, Confucius Classrooms); (b) development cooperation field offices where cultural/educational programming occurs (e.g. JICA project sites); (c) regulated partner institutions operating under framework agreements; and (d) formal educational establishments (e.g. AEFE schools). For Republic of Korea specifically: 2023 counted 42 locations (Korea Foundation headquarters/offices and Korean Cultural Centres); 2025 counts 621 locations (7 Korea Foundation, 35 Korean Cultural Centres, 256 Sejong Institutes, 331 other educational programmes). For Japan: 2023 counted 29 locations (Japan Foundation offices only); 2025 counts 594 locations (24 Japan Foundation offices, 133 Japan Foundation-supported institutions, 437 JICA field offices and project sites where cultural/educational activities occur). This expanded methodology better represents the full scope of countries' educational and cultural infrastructure, but it makes direct year-on-year comparisons challenging without accounting for definitional changes. Like-for-like comparisons using consistent definitions show more modest growth: Republic of Korea's formal cultural centres and foundations grew approximately 114 per cent (from 42 to ~90), while Japan's non-JICA cultural infrastructure grew approximately 450 per cent (from 29 to ~160), reflecting Japan's strategic expansion of cultural programming separate from development cooperation activities.

Germany operates 489 institutions globally, while maintaining systematic coverage across 139 countries. The German approach prioritises quality and strategic coherence over maximum geographical reach, with institutions operating under clear mandates within a tripartite Goethe-Institut, DAAD and GIZ structure.

Russia maintains 410 institutions despite political constraints affecting operations in multiple jurisdictions following the 2022 Ukraine invasion and subsequent deterioration in relations with Western countries.

The United Kingdom maintains 344 institutions across 99 countries, representing approximately 50 per cent of the global receiving country universe. This comprises 226 British Council offices and teaching centres, 80 British international schools, 21 FCDO-managed cultural facilities, and 14 other cultural/educational institutions (excluding UK universities' overseas campuses). This coverage suggests selective rather than comprehensive presence, with concentration in priority markets rather than universal deployment.

The United States operates 218 institutions primarily by means of diplomatic missions, with other programmes experiencing operational disruption during 2025 retrenchment. The USAID cessation as a standalone agency on 1 July 2025 and Voice of America constraints following March 2025 executive orders substantially reduced American soft power infrastructure. The American Spaces Network maintains operations with over 700 centres across 140 countries, representing the most significant remaining infrastructure element.

3.4.3 Strategic targeting: the United Kingdom example

The United Kingdom's institutional distribution demonstrates how geographical deployment reflects strategic priorities while also revealing legacy effects and path dependencies. Within Europe, the British Council fosters UK–European cultural and educational partnerships, the BBC World Service provides impartial news and counters disinformation to support democratic values, and the UK diplomatic network coordinates official cooperation. However, recent years have also seen the British Council forced to close several offices in Europe due to financial pressures, reducing its physical presence but continuing activity and influence with regional hubs and digital engagement.

In the United States, the British Council has closed its offices as part of a major global consolidation. Despite these office closures, the United Kingdom has maintained strong soft power connections via educational partnerships, English language programmes and digital engagement, with the British Council reaching millions online even as its physical footprint has diminished.

In strategic hinge markets, the United Kingdom demonstrates varied institutional engagement levels. India hosts a considerable UK institutional presence, reflecting historical ties and contemporary strategic importance. The scale of educational partnerships, with substantial numbers of Indian students in UK universities and British Council operations supporting English language learning and educational advising, creates networks supporting broader bilateral relationship development. However, engagement in African markets shows more selective deployment patterns, with substantial presence in some territories but limited operations in others. South Africa receives attention commensurate with its status as a regional power, while Nigeria's coverage appears more limited despite its designation as a hinge market. Gulf state presence reflects targeted institutional strategies rather than comprehensive coverage, with British Council operations concentrated in territories where partnerships with host governments (particularly in the United Arab Emirates, Qatar and Saudi Arabia, where bilateral agreements enable large-scale English language training contracts with government ministries) enable sustainable operations.

However, the geographical data indicates that UK institutional resources extend significantly beyond these priority areas. Several factors likely contribute: the British Council maintains substantial presence across Commonwealth countries reflecting historical relationships and linguistic advantages; the FCDO maintains broader strategic priorities beyond those articulated by the Soft Power Council, including engagement with major economies such as China and Japan and the wider Indo-Pacific region; the British Council's hybrid funding model, where substantial self-generated revenue supports strategic activities, enables sustained presence in markets offering operational sustainability alongside strategic importance; institutional path dependency means that established operations benefit from the long-term relationships and accumulated credibility that effective soft power requires, but may also continue partly through organisational inertia in cases where strategic priorities have shifted but operational realities constrain reallocation.

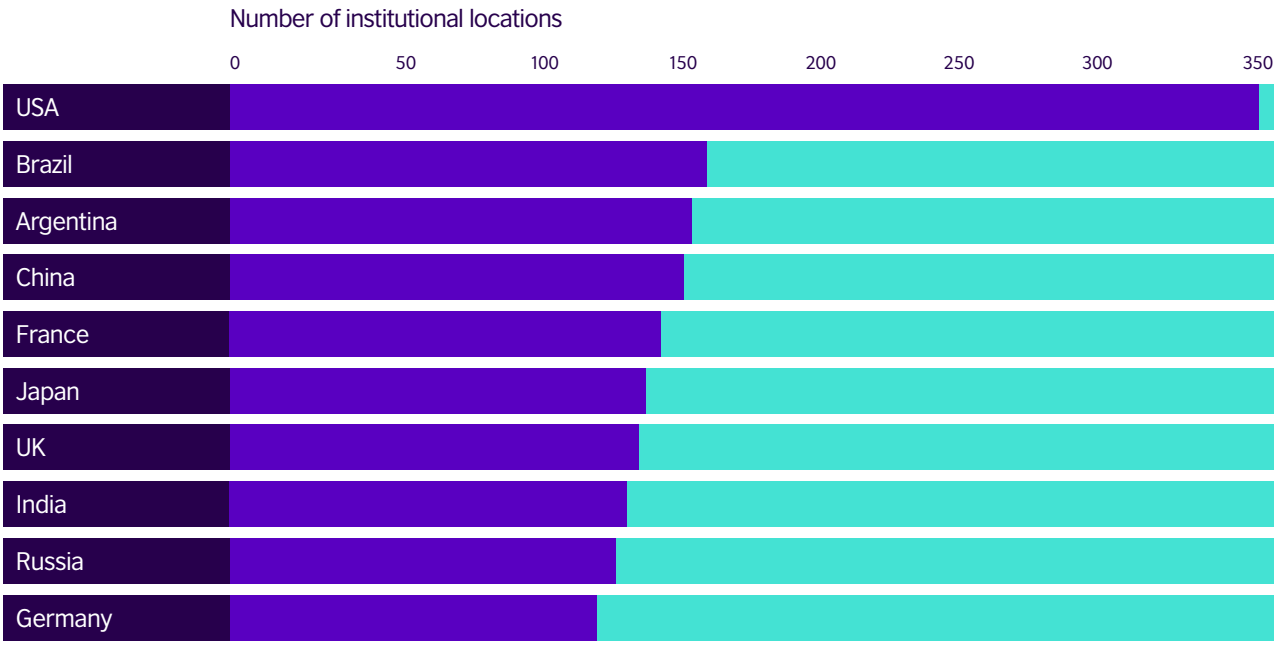
The challenge lies in distinguishing between valuable sustained engagement that builds influence over decades, and persistence in markets where historical presence no longer aligns with contemporary strategic priorities.

The pattern raises questions about future strategic alignment and resource allocation. Does the UK consciously choose to maintain broad geographical coverage rather than concentrated presence in priority markets? Or does institutional path dependency constrain reallocation toward priority areas? The Soft Power Council's priority designations are less than a year old (January 2025), and strategic reorientation of physical infrastructure requires several years to implement given contractual commitments, staff redeployment considerations, and the need to manage exit from markets responsibly. Future research should assess whether the SPC's coordination mechanisms enable gradual realignment between strategic priorities and resource deployment over a three to five year implementation period.

3.4.4 Receiving country analysis: patterns of institutional attraction

Examination of total institutional presence per receiving country shows distinct patterns of global attractiveness and strategic importance that reflect both contemporary geopolitical dynamics and enduring historical relationships.

Chart 5: Number of institutional locations: top ten receiving countries



The United States continues to attract the highest institutional presence globally, hosting 346 institutions from all sending countries combined. Countries across the sample maintain a substantial institutional presence in the United States, despite the 2025 retrenchment of American soft power programmes (see Chart 5 above).

This pattern suggests that institutional deployment decisions reflect factors including economic scale (the United States represents the world's largest market for educational services, cultural products and commercial opportunities), security relationships (allied nations maintain institutional presence as part of broader bilateral partnerships), historical legacies (former relationships and established networks persist over time), and practical necessities (diaspora engagement, policy monitoring, commercial operations).

The persistence of foreign institutional presence in the United States despite American soft power retrenchment indicates that geographical deployment patterns respond to multiple factors beyond reciprocal soft power effectiveness. Countries maintain institutional presence in the United States primarily due to its economic scale (the world's largest market for educational services, cultural products and commercial opportunities), security relationships (allied nations maintain institutional presence as part of broader bilateral partnerships irrespective of American soft power activities), diaspora engagement requirements (maintaining connections with expatriate communities for political, economic and cultural reasons), and practical necessities (policy monitoring, commercial operations). The relationship is fundamentally asymmetric rather than reciprocal. Countries maintain presence in the United States because of American power and market size, not because the United States maintains equivalent presence in their territories. The recent DOGE-driven retrenchment has occurred too recently (2025) to observe institutional responses, which typically require two to three years given contractual and operational constraints.

Beyond the United States, other major economies attract substantial institutional presence.

- China hosts 154 institutions despite increasing international tensions.

- Russia maintained 140 presences before 2022, although these declined substantially following the Ukraine invasion, as Western operations withdrew or were compelled to close by host governments. The British Council, Goethe-Institut, and other Western cultural organisations faced pressure to cease operations in Russia (with some formally expelled), while Russian cultural centres in Western countries similarly closed or faced restrictions. The decline thus reflects both voluntary strategic withdrawal and involuntary expulsion rather than solely institutional choice. Current institutional presence data is unavailable following the 2022 closures. The British Council, Goethe-Institut, and Institut français ceased Russian operations in March–April 2022.

- Brazil hosts 161 institutions, reflecting both its economic scale and the extensive Alliance française network across Latin America.

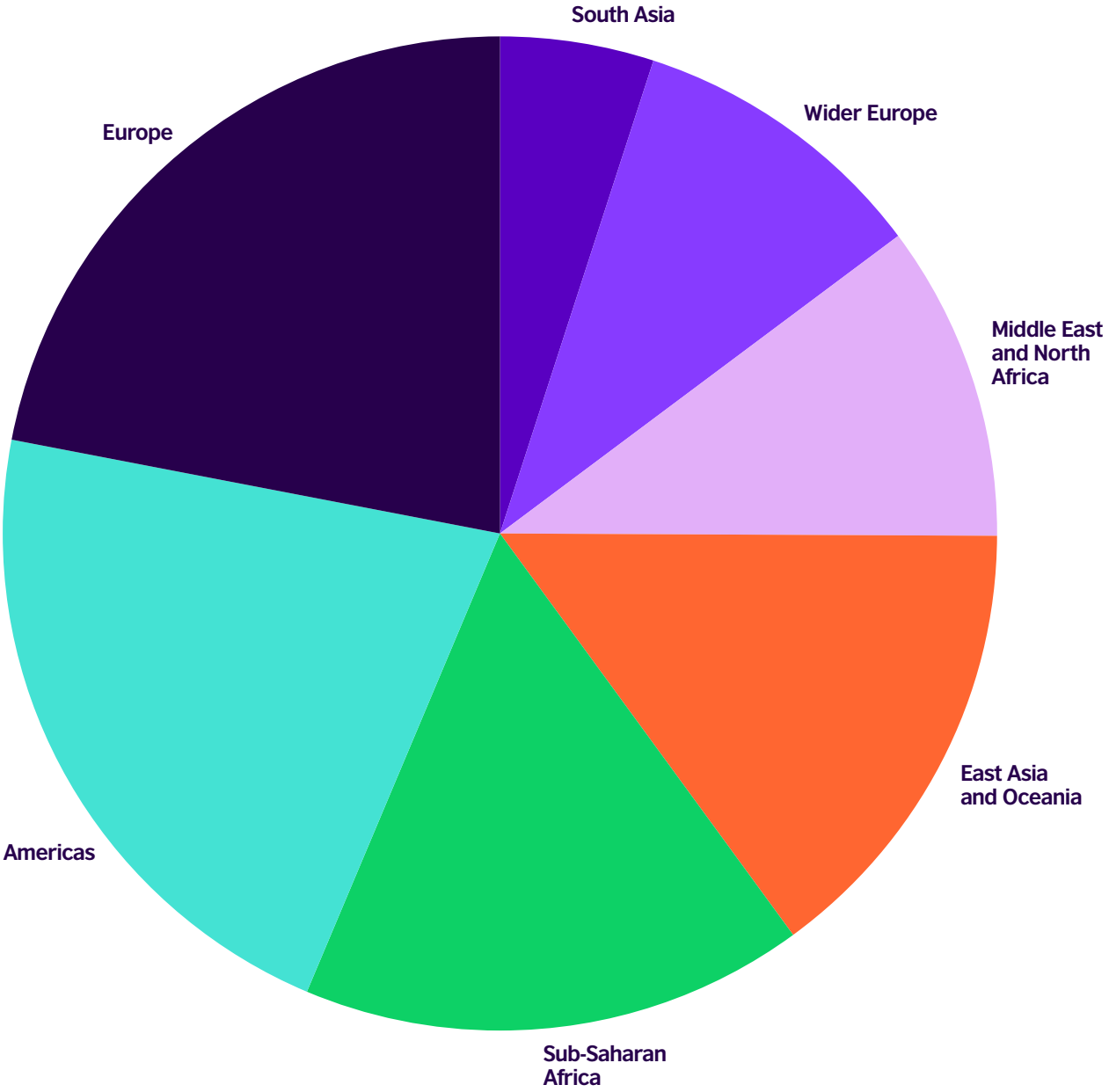
- Argentina hosts 155 institutions, though this figure is heavily weighted toward French cultural infrastructure (approximately 110 Alliance française centres) rather than representing broad multi-country interest, suggesting that institutional density sometimes reflects individual country strategies and historical legacies rather than collective assessment of strategic importance.

France hosts 146, Japan 140, and the United Kingdom 138 institutions. The concentration in major economies and regional powers follows patterns observable across international institutional presence generally, where countries maintain operations in large markets and politically significant locations for reasons extending beyond soft power projection, including the economic, security and historical factors discussed above.

3.4.5 Regional distribution and competitive intensity

Regional distribution of institutional presence reveals substantial variations in both concentration and competitive dynamics across different parts of the world.[12] These regional variations reflect different combinations of economic scale, political significance, historical relationships and security considerations influencing deployment decisions across regions (see Charts 6 and 7 on pages 59 and 60).

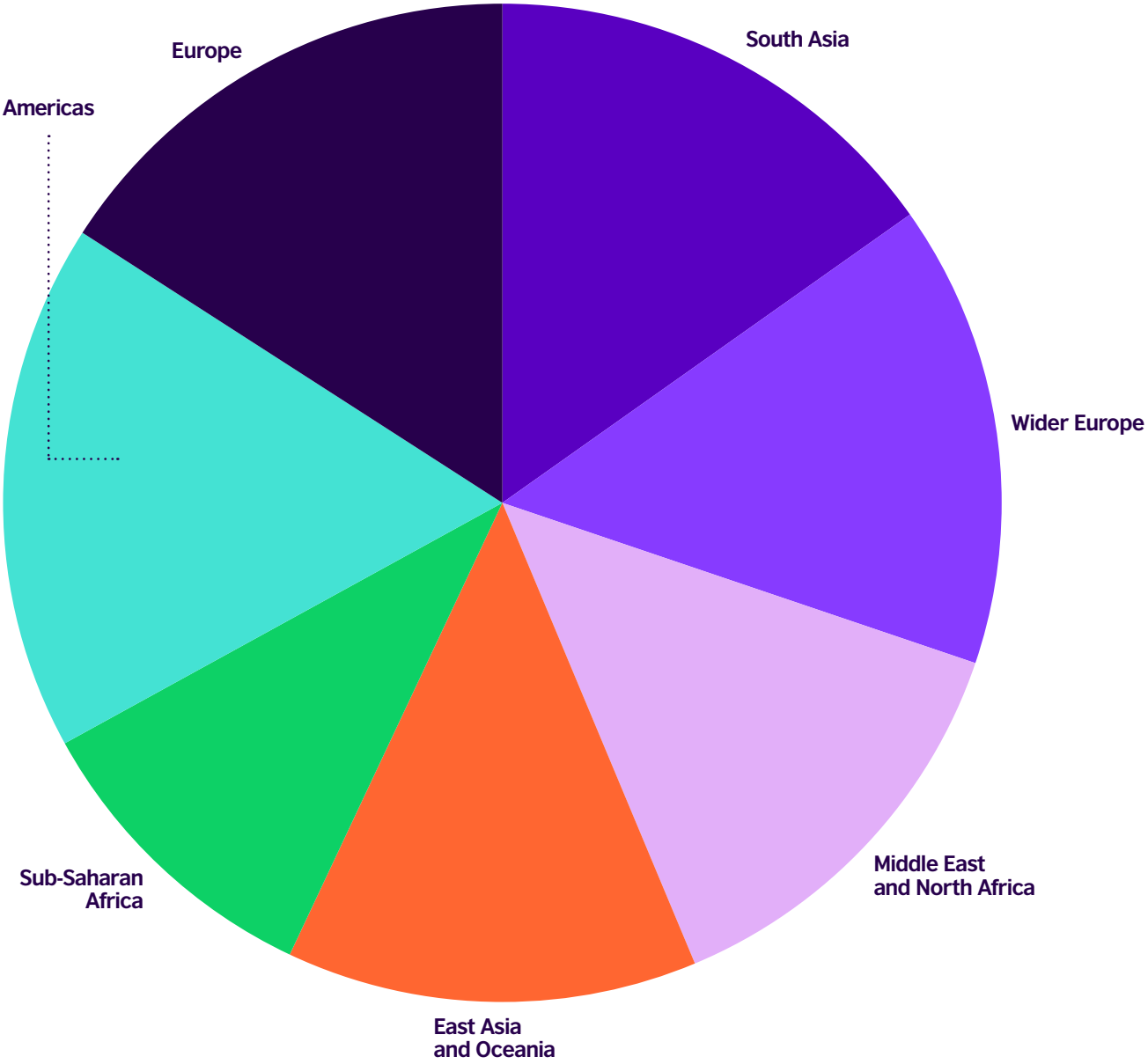
Chart 6: Regional Distribution and Competitive Intensity



[12] Institutional deployment data compiled from: Lowy Institute (2024) Global Diplomacy Index. Sydney: Lowy Institute; organisational annual reports and websites for all 25 sending countries; embassy and mission databases maintained by respective foreign ministries. Regional classifications follow United Nations (UN) geoscheme. 'Countries' column indicates number of receiving territories in each region; 'Average per country' calculated as Total institutions/countries.

Competition for influence using soft power infrastructure[13] is most intense in Europe and the Americas, where the number of 'sending' locations – embassies, cultural institutes, educational programmes and affiliated organisations – is both high and densely distributed across relatively few countries.

Chart 7: Regions by competitive intensity (average number of institutions per country)



[13] Competitive intensity, measured as the average number of institutions per country, is highest in the Americas (49.5) and Europe (46.3), reflecting a dense concentration of cultural and educational institutions relative to the number of countries. South Asia (44.2), wider Europe (43.4), and the Middle East and North Africa (39.3) show moderate levels of intensity, suggesting fairly robust institutional networks despite smaller regional footprints. East Asia and Oceania (38.5) ranks slightly lower, reflecting broader geographic dispersion, while Sub-Saharan Africa (29.1) exhibits the lowest competitive intensity, indicating a thinner institutional presence per country and potentially greater scope for expansion or capacity-building in that region.

Europe's networked landscape of national institutes (e.g. Institut français, Goethe-Institut, British Council, Cervantes) produces a layered and competitive field, amplified by EUNIC collaboration and overlapping EU initiatives. The Americas, led by the United States, Canada, Brazil, and Mexico, show similar concentration effects. The United States alone sustains a vast global network via the State Department, USAID, and the Fulbright and American Spaces systems. In these regions, competition is not only quantitative but also qualitative, driven by reputational capital, technological capability, and control over global media and educational standards.

By contrast, competitive intensity is weakest in Sub-Saharan Africa and South Asia, despite their strategic importance and demographic weight. The low number of 'sending' institutions per country – combined with uneven national capacities and limited regional coordination – results in thinner coverage and lower institutional density. This leaves significant scope for external actors to expand or consolidate their presence, particularly China, India, and Gulf states, which have begun to fill institutional gaps with targeted cultural and educational investments. In these regions, competition for influence is less about overlapping Western networks and more about asymmetrical entry, where infrastructure growth reflects the strategic priorities of a few dominant senders rather than an ecosystem of competing cultural powers.

3.4.6 Emerging actors and new entry patterns

Significant new entrants in the tracked sample include three African countries projecting soft power continentally: Nigeria (present in 32 Sub-Saharan African countries), South Africa (27 countries) and Kenya (17 countries). These patterns indicate South-South soft power dynamics, with African regional powers establishing cultural and educational presence across the continent. The approach typically emphasises diplomatic integration and educational partnerships rather than extensive physical cultural infrastructure, reflecting resource constraints but also different institutional models from traditional Western cultural diplomacy.

Gulf states achieve notable penetration, with Saudi Arabia present in 22 countries and the United Arab Emirates in 18 countries. This expansion reflects ambitious attempts to project influence by means of cultural investments, educational partnerships and development assistance. The Gulf approach uses sovereign wealth funds for rapid infrastructure development, enabling accelerated institutional establishment compared to models relying on annual budget appropriations. However, the long-term sustainability and effectiveness of these investments remain to be established, as cultural influence requires sustained engagement and credibility that cannot be purchased rapidly.

Türkiye maintained presence across 17 countries, while Indonesia operated in 12 countries, representing emerging Asian and Middle Eastern engagement in African markets. These actors demonstrate that soft power projection is no longer monopolised by Western countries and major powers, with middle powers increasingly establishing international cultural and educational presence aligned with their foreign policy priorities.

3.4.7 Physical infrastructure distribution within receiving countries

Analysis of deployment patterns within receiving countries reveals distinct institutional approaches. France's Alliance française network demonstrates the most extensive sub-national presence, operating multiple centres within larger receiving countries to engage regional populations beyond capital cities. This multi-location strategy reflects France's comprehensive approach, combining diplomatic missions with dedicated cultural infrastructure across diverse geographical contexts.

Germany's Goethe-Institut similarly maintains presence in multiple cities within priority markets, particularly targeting federal states where regional centres possess substantial autonomy. This approach enables engagement with local cultural and educational communities, while maintaining coordination by means of central mandates within the tripartite structure.

China's institutional distribution before the 2024–2025 restructuring showed variable patterns. Confucius Institutes operated primarily via university partnerships, creating presence in cities hosting major educational institutions rather than exclusively in capital cities. However, following restructuring to 459 locations, the extent of sub-national distribution has contracted, with presence increasingly concentrated in capital cities and major metropolitan areas.

Countries operating primarily using embassy-based diplomatic networks (United States, Russia) maintain almost exclusively capital-focused presence, with cultural programming integrated within diplomatic missions. This approach prioritises reach across numerous countries over depth within individual territories, although the American Spaces Network provided some secondary city presence before 2025 constraints.

Japan's JICA development cooperation model shows distinctive patterns, with project offices located according to development programme requirements rather than cultural diplomacy considerations. This creates presence in provincial and rural areas where development projects operate, extending reach beyond capital-based networks but driven by operational rather than cultural engagement priorities.

Republic of Korea's institutional expansion reflects demand generated by the Korean Wave, with Korean Cultural Centres and Sejong Institutes established in cities demonstrating substantial interest in Korean language and culture. This market-responsive approach creates presence where commercial and cultural demand exists rather than following predetermined geographical strategies. The data suggests that comprehensive multi-location strategies require either extensive resources (France) or specific operational drivers (Japan's development projects, Republic of Korea's cultural demand). Countries with more limited resources or diplomatic network-based approaches concentrate on capital cities to maximise impact within political and economic decision-making centres.

3.4.8 Strategic implications of geographical deployment

The geographical and sub-national deployment analysis reveals several patterns relevant to understanding contemporary soft power infrastructure effectiveness.

Resource concentration versus global dispersion: Australia's Indo-Pacific focus demonstrates how middle powers can achieve impact by regional concentration rather than attempting global coverage. Conversely, France's extensive worldwide presence, including multiple locations within receiving countries, requires sustained high-level investment that few countries can maintain. The effectiveness trade-offs between these approaches remain difficult to establish from deployment data alone, as presence does not automatically translate into influence.

Institutional path dependency: The tension between articulated strategic priorities and actual deployment patterns appears across multiple countries in the sample. While some nations have initiated retrenchment – China contracted its presence substantially following political opposition, and the United States reduced infrastructure despite historical investment, these adjustments remain partial and contested. France exemplifies the opposite pattern, maintaining costly global networks established over decades despite evolving strategic priorities. These varied responses reveal that geographical distribution reflects accumulated historical decisions and institutional inertia as much as contemporary strategic calculation. Even where reallocation occurs, it faces significant resistance from existing operational constituencies and relationships built over extended periods, resulting in incremental rather than transformative change.

Competitive dynamics in emerging markets: Sub-Saharan Africa shows high competitive intensity despite lower institutional density compared to Europe or the Americas. This suggests recognition of the region's strategic importance without corresponding resource commitment, possibly reflecting infrastructure maintenance costs and sustainability challenges constraining expansion regardless of strategic intent.

Digital–physical integration: The analysis indicates that while digital platforms extend content distribution capabilities, sustained relationship building and institutional credibility accumulation appear to require physical presence over extended periods. France's multi-location model and Germany's federal targeting suggest that sub-national presence matters for depth of engagement, although whether this generates superior influence outcomes relative to costs would require evaluation beyond available deployment data.

Deployment drivers beyond soft power projection: The persistence of substantial institutional presence in major economies regardless of reciprocal soft power activities, combined with variable sub-national distribution patterns driven by factors including development project locations (Japan), cultural demand (Republic of Korea) and federal structures (Germany), reinforces observations that geographical deployment reflects multiple objectives, including economic, security and practical considerations rather than primarily strategic soft power calculations.

The analysis of physical institutional deployment thus reveals patterns of concentration, competition and strategic choice that shape contemporary soft power landscapes. However, physical presence represents only one dimension of contemporary infrastructure, with digital platforms increasingly complementing – and in some cases substituting for – traditional institutional networks. The following section examines how countries integrate digital technologies into their soft power strategies, assessing whether digital transformation elevates or transforms the geographical patterns observed above.

3.5 Technology and digital engagement

3.5.1 Digital maturity assessment

The research employed a three-tier framework assessing countries' systematic integration of digital technologies into soft power infrastructure: connected (sophisticated integration across institutions), emerging (developing capabilities with nascent platforms), and nascent (limited infrastructure relative to capabilities) (see Table 6 on page 66).

Connected countries demonstrate coordinated digital strategies across multiple institutions with quantified engagement metrics and systematic transformation programmes. France integrates Campus France, Alliance française and Institut français platforms into unified digital ecosystems.[14] Germany invests substantially in Goethe-Institut digital language learning platforms and DAAD comprehensive information systems. The United Kingdom operates substantial British Council online English language platforms, alongside BBC World Service multilingual digital distribution with sophisticated audience analytics.

[14] Digital maturity assessments based on: organisational website analysis; social media platform presence and engagement metrics (Socialbakers data, Q3 2025); published digital strategy documents; and practitioner interviews conducted June–August 2025. Classification methodology adapted from Google's Digital Maturity Model Apptic consulting https://apticconsulting.com/blog/an-introduction-to-the-digital-maturity-framework-dmm/ and applied to soft power context. See Appendix C for full framework.

Emerging countries show platform development and strategic recognition without full implementation. India's Ministry of External Affairs is expanding its social media presence and digital programming. Italy launched the 'Italiana' platform in 2023. Spain, Canada and Australia demonstrate substantial initiatives without achieving connected coordination and measurement sophistication.

Nascent countries maintain basic government websites without sophisticated engagement platforms, systematic transformation programmes or evidence of digital engagement tracking. Several major economies show digital development lagging behind economic capabilities, maintaining traditional approaches emphasising physical infrastructure.

Table 6: Digital maturity of each jurisdiction

France	Canada	Spain	Indonesia	Russia
Germany	China	United States	Kenya	Saudi Arabia
Republic of Korea	India	Argentina	Mexico	South Africa
United Kingdom	Italy	Brazil	Nigeria	Türkiye
Australia	Japan	European Union	Portugal	UAE

Connected Emerging Nascent

3.5.2 Digital strategies and institutional integration

Republic of Korea demonstrates commercial cultural digital collaboration, with Korean Wave content distributed using market-driven streaming platforms, social media and gaming communities. Government provides enabling infrastructure (trade promotion, copyright protection, market access negotiation) rather than directly producing content. This achieves substantial soft power gains at modest direct government cost, although replication requires creative industries capabilities and government–industry coordination mechanisms.

France and Germany are pursuing digital transformation of traditional infrastructure, requiring sustained investment in both physical and digital capabilities. This approach maintains institutional presence while extending reach, although it is proving expensive relative to digital-primary strategies.

China invests substantially in CGTN multilingual presence and sophisticated social media operations, although effectiveness remains limited. State-directed content often fails to generate organic engagement characterising successful digital cultural influence, while message control objectives conflict with authenticity requirements for digital effectiveness.

The United States historically possessed substantial Voice of America and educational programming digital capabilities. However, 2025 retrenchment is disproportionately affecting these capabilities.

3.5.3 Platform strategies and measurement challenges

Platform preferences vary substantially across regions, requiring adapted strategies. Facebook, Instagram, YouTube and X dominate in Western markets, WhatsApp in Latin America and parts of Asia, WeChat and Weibo for Chinese engagement, Telegram and VKontakte in post-Soviet states. Most sample countries maintain social media presence with varying sophistication, some demonstrating coordinated strategies with regular content creation and performance analytics, others maintaining static presence with irregular updates.

Measurement proves challenging despite abundant data. Follower counts and view statistics provide basic reach metrics but reveal little about influence or attitude change. Engagement metrics (likes, shares, comments) indicate content resonance but can be manipulated and may not reflect sustained interest. Attribution challenges complicate assessment of whether digital engagement advances soft power objectives.

3.5.4 Digital infrastructure limitations

Several constraints affect digital soft power effectiveness regardless of sophistication. The digital divide persists within and across countries, with populations lacking internet access or digital literacy unreachable via digital channels. Platform dependence creates vulnerabilities, as algorithm changes dramatically affect content reach, while platform policies may conflict with objectives. Misinformation and manipulation undermine effectiveness, creating audience scepticism regardless of content accuracy. The ephemeral nature of social media interactions generates momentary attention without necessarily building the lasting relationships and trust characterising effective soft power.

Resource requirements for sustained digital engagement prove substantial despite lower distribution costs compared to those for physical infrastructure. Quality content creation requires skilled personnel, production capabilities and continuing platform maintenance investment.

3.5.5 Digital maturity and outcomes

Our analysis indicates that there may be positive associations between connected status and superior outcome scores, suggesting that systematic digital integration correlates with effectiveness. However, the relationship is non-deterministic, with some connected countries achieving moderate outcomes, while some emerging countries demonstrate strong performance. This indicates that digital maturity represents one factor among several influencing outcomes, with connected status benefiting from extended reach and efficient engagement without guaranteeing superior overall performance.

Countries demonstrating digital maturity progress between 2022 and 2025 include several emerging nations implementing systematic transformation programmes, although progression from emerging to connected typically requires sustained multi-year investment. Digital maturity represents dynamic capability requiring continuous adaptation as technologies evolve, audience expectations change and competitive pressures intensify.

3.5.6 Covid-19 Pandemic impact on digital-physical infrastructure balance

The Covid-19 pandemic (2020–2022) forced accelerated digital transformation as physical programming became impossible. Countries with existing digital capabilities adapted more effectively. Germany's Goethe-Institut rapidly expanded digital language learning platforms and virtual exhibitions, France coordinated digital programming across Alliance française networks, and the British Council's established online platforms provided a degree of revenue stability during physical programme suspension. Countries lacking digital infrastructure experienced more severe disruption, particularly in regions with limited internet connectivity such as parts of Central Asia and Sub-Saharan Africa, where physical programme suspension left limited alternatives.

The post-pandemic period (2023–2025) demonstrates that digital acceleration does not fundamentally replace physical infrastructure. Germany and France have resumed physical programming while retaining improved digital capacity, creating hybrid models. Some countries that rapidly expanded digital presence during lockdowns subsequently reduced their investment as physical programming resumed, suggesting that digital expansion reflected crisis adaptation rather than strategic transformation.

The pandemic's lasting impact appears most evident in measurement sophistication and acceptance of hybrid programming models, particularly in educational recruitment, where universities maintain digital information platforms alongside physical programmes. However, the data suggests that sustained relationship building and institutional credibility accumulation continue to benefit from physical presence, with digital channels serving complementary rather than replacement functions. The brief period of enforced digital-only operation revealed both the possibilities and the limitations of digital soft power projection, reinforcing observations that the best approaches integrate rather than substitute digital and physical infrastructure.

4

Outcomes

4.1 Introduction

Soft power outcomes represent the measurable effects that result from successful international asset deployment by means of infrastructure investments. Outcomes encompass changes in international perception, behaviour and relationships that advance national interests resulting from attraction, persuasion and cooperation rather than coercion or economic incentives.

Direct measurement of soft power outcomes proves inherently challenging for several interconnected reasons.

- Establishing clear attribution requires robust situational analysis to understand how influence operates within specific contexts, yet the complexity of these environments often resists systematic assessment.

- A fundamental difficulty lies in the frequent absence of clearly articulated policy goals: without explicit statements of what is to be achieved and why, determining whether outcomes have been realised becomes essentially arbitrary.

- Even where objectives exist, evaluators must carefully distinguish between inputs (resources committed), outputs (activities delivered) and outcomes (actual changes effected in target audiences' preferences or behaviour).

- Standard evaluation frameworks such as those outlined in the *Magenta Book* depend on reliable and verifiable data about these elements, yet soft power initiatives frequently lack systematic documentation of either input levels or output delivery, undermining the application of established evaluation methodologies.

- The challenge intensifies when seeking evidence of reception and impact: data on how activities are actually received – whether or not they generate attitude shifts or influence subsequent behaviour – remains scarce and difficult to collect systematically.

- Moreover, soft power frequently operates over extended timeframes by means of highly specific channels – an educational exchange programme may shape a future political leader's orientation decades later – making impact assessment require longitudinal perspectives and fine-grained analysis that standard evaluation approaches struggle to accommodate.

- It is also hard to distinguish soft power effects from other factors influencing international relationships.

A robust understanding of soft power effectiveness therefore demands not merely perception surveys or anecdotal evidence, but the systematic integration of diverse empirical indicators capable of resolving these multiple, interlocking difficulties.

To start to deal with these challenges, our analysis breaks down the dimensions of soft power included in the indices we examined into six distinct categories of soft power outcomes, each representing different dimensions of international influence: reputation and perception outcomes; attraction and engagement outcomes; influence and cooperation outcomes; network and relationship outcomes; recognition and legitimacy outcomes; and temporal trajectories examining whether countries gain or lose ground across these outcome dimensions over time.

Taking the above complexity into account, we started from the premise that more than perception surveys or anecdotal evidence was required, and an approach to outcomes (albeit a partial one), would benefit from the systematic integration of diverse empirical indicators.

We therefore built on the approach we used in *Soft Power at a Turning Point*, by using a range of international indices to construct a composite, evidence-based proxy for soft power outcomes. These indices, covering governance, education, research, culture, innovation, diplomacy and global perception, collectively offer the best available data sources on the assets, infrastructures, and behaviours by means of which influence is projected and received. By synthesising such measures, we can approximate how effectively a country converts its underlying capabilities and values into international attraction and trust, producing a multidimensional view of soft power that is both comparable across countries and sensitive to temporal change. See Appendix B for a full account of our methodology.

The 15 indices employed represent a subset of possible measures, with selection effects potentially favouring certain countries or strategies (see Table 7 on pages 74 and 75). Nevertheless, the triangulation across multiple independent measurement instruments strengthens confidence that observed patterns reflect genuine effectiveness variations rather than methodological artefacts.

Table 7: Indices used in this report

Index	Description
Brand Finance Nation Brands (2024)	A proprietary annual valuation of national brand strength and financial value, produced by Brand Finance. It estimates the economic worth of each country's brand based on marketing investment, familiarity, governance, and economic performance.
Anholt-Ipsos Nation Brands Index (2024)	A global perception survey measuring international reputation of 60+ countries across six dimensions: Exports, Governance, Culture, People, Tourism, and Immigration/investment. Published annually by Ipsos.
Good Country Index (2024)	An open-access index measuring each country's contribution to the common good of humanity relative to its size, across areas such as science, culture, peace, and the environment.
Lowy Institute Global Diplomacy Index (2024)	An open-access index measuring each country's contribution to the common good of humanity relative to its size, across areas such as science, culture, peace, and the environment.
QS World University Rankings (2024)	Ranks universities globally using indicators such as academic reputation, employer reputation, faculty–student ratio, citations per faculty, and internationalisation metrics.
Times Higher Education World University Rankings (2024)	Evaluates global universities using teaching, research, citations, international outlook, and industry income to assess research and education excellence.
Shanghai Ranking ARWU (2024)	Academic Ranking of World Universities assessing research output and quality based on Nobel Prizes, Fields Medals, highly cited researchers, and papers in Nature and Science.
UNESCO Institute for Statistics International Student Mobility (2024)	Provides official data on international student flows, showing numbers and shares of inbound and outbound tertiary students per country.
Nature Index (2024)	Tracks high-quality scientific research output using author affiliations in a selected group of leading natural science journals, representing global research excellence.
World Bank Worldwide Governance Indicators (2024)	Aggregates governance performance across six dimensions (voice and accountability, political stability, government effectiveness, regulatory quality, rule of law, and control of corruption).
V-Dem Democracy Index (2024)	The Varieties of Democracy (V-Dem) project provides multidimensional measures of democracy quality, including liberal, participatory, and deliberative components.

Index	Description
UNCTAD Foreign Direct Investment Statistics (2024)	Reports inward and outward FDI flows and stocks by country, recording international investment attractiveness and economic openness.
UNWTO International Tourism Statistics (2024)	Provides official statistics on international tourist arrivals and receipts, reflecting a country's tourism performance and global connectivity.
Global Innovation Index (2024)	Published by World Intellectual Property Organization (WIPO), ranks countries by innovation performance using inputs (institutions, infrastructure, human capital) and outputs (knowledge, creativity, technology).
Soft Power 30 Index (2023)	Combines objective data and global polling to rank countries on their ability to influence others through culture, education, diplomacy, digital presence, and governance; last issued in 2019–2023 by Portland Communications.

4.2 Overall performance rankings

To generate a consistent and transparent measure of soft power outcomes, we combined data from the 15 indices into a single composite score using principal component analysis (PCA). This approach enabled the integration of diverse yet complementary indicators, covering national reputation, higher education, culture, innovation, governance, diplomacy, and economic openness, into one statistically validated metric. PCA was selected to identify the main patterns of variation shared across the different indices. This approach reduces the number of variables that need to be examined, while preserving the significant information in the data and avoiding the problem of inadvertently counting the same underlying factor multiple times when indices overlap. The resulting composite scores, scaled from 0 to 100, provided a comparable proxy for countries' overall soft power performance, helping us to interpret cross-national patterns and analyse how resources and infrastructures translate into international influence.

The comparative analysis indicates significant variations in soft power effectiveness across the 25 jurisdictions studied. The scores range from 0 to 100, with higher scores indicating stronger performance across the multiple outcome dimensions measured by the 15 indices (see Table 8 on page 76).

Germany leads overall, reflecting sustained effectiveness across multiple outcome areas, particularly in reputation indices measuring trustworthiness and international cooperation, and educational attraction metrics recording international student flows and research collaboration. Japan ranks second, demonstrating strong performance in development cooperation reputation and educational partnerships, alongside cultural influence measures reflecting both traditional and contemporary cultural engagement.

Table 8: Overall soft power performance rankings by outcome score[15]

Rank	Country	Outcome score (0–100)	Total soft power spending (£bn)	Efficiency (score per £bn)
1	Germany	74.97	26.06	2.88
2	Japan	70.45	9.31	7.57
3	Canada	69.80	5.02	13.90
4	United Kingdom	68.95	17.12	4.03
5	France	70.45	9.31	7.57
6	Australia	62.15	3.13	19.86
7	Republic of Korea	61.83	2.60	23.78
8	United States	59.42	21.25	2.80
9	Italy	56.28	1.79	31.44
10	Spain	55.91	1.21	46.21
11	Brazil	52.36	1.00	52.36
12	India	51.74	1.78	29.07
13	Türkiye	48.92	0.44	111.18
14	China	47.58	55.88	0.85
15	Indonesia	46.23	0.68	67.99
16	Mexico	44.67	0.70	63.81
17	UAE	43.15	0.32	134.84
18	Argentina	41.89	0.41	102.17
19	Saudi Arabia	40.72	0.47	86.64
20	South Africa	39.84	0.08	498.00
21	Russia	38.26	1.26	30.37
22	Portugal	37.95	0.24	158.13
23	Nigeria	34.61	0.11	314.64
24	Kenya	32.18	0.03	1,072.67

Canada's third-place ranking requires careful interpretation. This appears notably higher than Canada's positions in some other prominent soft power indices, probably reflecting our methodology's particular emphasis on multilateral engagement metrics and values-based reputation measures, where Canada performs exceptionally well, combined with strong educational attraction scores.

The United Kingdom's fourth position indicates solid performance across traditional soft power areas despite recent fiscal pressures and strategic transitions. France rounds out the top five, maintaining significant cultural influence by means of extensive institutional networks while facing efficiency challenges in resource allocation relative to outcomes achieved.

4.3 Efficiency analysis

Our approach allows consideration of the relationship between investment levels and outcome scores, offering insight into how nations translate resources, legacy, and institutional design into international influence.

When actual spending is compared with overall outcome scores, several main patterns emerge.

- Germany, Japan, Republic of Korea and Australia achieve strong results from moderate budgets. Their effectiveness derives from institutional coherence, credible governance, and sustained cultural reputation rather than large spending.

- The United Kingdom, France, United States, Canada and China maintain global reach with substantial infrastructures, but their returns per pound are flatter – suggesting diminishing efficiency at high expenditure levels.

- Italy, Spain, Portugal, Brazil, India, Russia, etc. perform moderately despite relatively modest or stagnant funding, reflecting the continuing value of long-established cultural and linguistic legacies.

- The United Arab Emirates, Saudi Arabia, Indonesia, South Africa, Nigeria and Kenya are building capacity and expanding engagement, but their outcomes remain variable as institutions mature.

[15] Composite scores calculated using PCA integrating 15 validated international indices: Brand Finance Nation Brands (2024), Anholt-Ipsos Nation Brands Index (2024), Good Country Index (2024), Lowy Institute Global Diplomacy Index (2024), QS World University Rankings (2024), Times Higher Education World University Rankings (2024), Shanghai Ranking ARWU (2024), UNESCO Institute for Statistics International Student Mobility (2024), Nature Index (2024), World Bank Worldwide Governance Indicators (2024), V-Dem Democracy Index (2024), UNCTAD Foreign Direct Investment Statistics (2024), UNWTO International Tourism Statistics (2024), Global Innovation Index (2024), and Soft Power 30 Index (2023, latest available). See Appendix B for detailed methodology. All index data accessed August–September 2025.

The data underscores that strategic coherence, institutional quality and authenticity outweigh resource magnitude in determining soft power performance. Nations that align investment with purpose and credibility convert their resources into influence more effectively than those that rely primarily on financial scale.

Although efficiency is defined here as the outcome score achieved per pound spent, the relationship between spending and results is non-linear. Germany records the highest overall score (74.97) with expenditure of around £25 billion – equivalent to roughly 3.0 outcome points per billion pounds. France achieves 63.72 with £12 billion (5.3 points per billion), while the United Kingdom reaches 68.95 with £16 billion (4.3 points per billion). This shows that each additional pound spent does not necessarily produce a proportional gain in influence. Once core institutions and networks are established, extra spending tends to yield smaller incremental benefits. In other words, scale alone cannot guarantee greater soft power impact. Strategic focus and credibility become more important than sheer volume of investment.

However, this simple ratio conceals important dynamics. As performance rises, each additional gain becomes progressively harder and more costly to achieve. Raising an outcome score from 60 to 65 may require modest additional effort, but moving from 90 to 95 demands disproportionately greater investment and coordination. Germany's ability to sustain the highest overall score while keeping spending at a moderate level illustrates strategic coherence and institutional efficiency. It converts resources into influence more effectively than peers with either higher or lower total expenditure.

Republic of Korea demonstrates exceptional efficiency by any measure, achieving 61.83 with only £2.6 billion spending (23.8 points per billion) – nearly eight times more efficient than Germany and four times more than France. However, this partly reflects difficult-to-replicate advantages, including commercial cultural sector success, the Korean Wave phenomenon, and strategic focus on a single area rather than comprehensive soft power investment.

When we characterise Germany as 'highly efficient', we refer to achieving the highest outcome score from integrated institutional approaches and strategic coherence, acknowledging that France demonstrates superior pound-for-pound efficiency, and Republic of Korea's efficiency is exceptional but reflects unique circumstances.

4.4 Reputation and perception outcomes

International reputation represents a fundamental soft power outcome, as favourable perceptions create foundations for influence and cooperation, while also providing what scholars increasingly term 'reputational security' – the capacity to withstand international crises, policy setbacks or domestic challenges without catastrophic damage to national standing.

Germany consistently achieves high reputation scores across multiple indices, reflecting decades of sustained investment in relationship building, technical cooperation and multilateral engagement.[16]

Traditional major powers including the United Kingdom, France and Japan maintain generally positive reputations built on historical cultural contributions, educational excellence and democratic governance, although with some variation across different audiences and contexts measured by segmented survey data. Brexit creates temporary reputation challenges for the UK in European audience segments measured by regional breakdowns in reputation indices, although underlying reputational capital appears to limit damage, with United Kingdom scores declining only moderately rather than collapsing despite the significant policy rupture.[17]

Domestic political developments in various countries occasionally generate international criticism affecting reputation scores in temporal tracking data. The United States demonstrates more variable reputation outcomes across the indices employed, with strong positive perceptions in some areas (innovation, higher education, entertainment) alongside criticism in others (political polarisation, inequality, foreign policy).

China faces significant reputation challenges despite substantial soft power investment. While Chinese economic development and technological advancement generate respect, concerns about political governance, human rights, international behaviour and transparency constrain overall reputation scores.

[16] Brand Finance Nation Brands (2024) (Germany ranked second globally); Anholt-Ipsos Nation Brands Index (2024) (Germany ranked first); Good Country Index (2024) (Germany ranked fifth). Composite reputation scores calculated across seven reputation-specific indices.
[17] Anholt-Ipsos Nation Brands Index (2024), European subsample analysis. UK scores among European respondents declined from 72.3 (2021) to 65.8 (2024) on governance perception measures, while remaining stable in other regions (71.1 global average 2024).

4.5 Attraction and engagement outcomes

Beyond general reputation, soft power effectiveness manifests as a result of specific attraction outcomes where international audiences actively seek engagement with national culture, education or expertise.

- Educational attraction represents one of the most measurable soft power outcomes. The United Kingdom attracts substantial international student numbers, with international education generating £27.9 billion annually. The United States historically dominates international student attraction resulting from university excellence and extensive scholarship programmes. Germany demonstrates growing educational attraction despite language barriers, with increasing numbers of international students attracted by quality education, low or no tuition fees and favourable post-study work opportunities.[18] International education represents Australia's fourth-largest export sector at AUD 36.4 billion (£18.7 billion) annually.[19]

- Cultural attraction manifests by means of tourism patterns, cultural product consumption, language learning and participation in cultural programmes. France maintains cultural attraction leadership by tourism to cultural sites.[20] The United Kingdom similarly benefits from cultural attraction by means of tourism, English language dominance, creative industries exports and British Council cultural programmes. Republic of Korea demonstrates extraordinary cultural attraction growth from the Korean Wave, and Korean language learners globally increased from approximately 12 million in 2020 to over 17 million by 2024.[21] The Japan Foundation reports approximately 3.8 million Japanese language learners globally in 2024.[22]

[18] UNESCO Institute for Statistics (2024) Global Flow of Tertiary-Level Students. Paris: UNESCO. Data extracted September 2025. Germany hosted 394,665 international students in 2024 (DAAD statistics), representing 6.8 per cent of global mobility flows.
[19] Australian Bureau of Statistics (2024) International Trade in Goods and Services, Australia. Canberra: ABS. Cat. no. 5368.0. Figure represents export value of education-related travel services for year ending June 2024.
[20] United Nations World Tourism Organization (2024) International Tourism Highlights, 2024 Edition. Madrid: UNWTO. France received 85.2 million international tourist arrivals in 2024, compared to 89.4 million in 2019.
[21] King Sejong Institute Foundation (2024) Global Korean Language Learning Statistics 2024. Seoul: KSIF. Figures include formal learners in Sejong Institutes, university programmes, and other certified institutions. Excludes informal/self-study learners.
[22] Japan Foundation (2024) Survey Report on Japanese-Language Education Abroad 2023. Tokyo: Japan Foundation. Published August 2024, covering 142 countries and regions.

4.6 Influence and cooperation outcomes

The ultimate soft power objective involves influencing international behaviour to align with national interests, demonstrated by support for policy positions, participation in multilateral initiatives and collaborative responses to international challenges.

Germany's influence manifests via European integration leadership, contributions to multilateral institutions and partnerships on global challenges, including climate change. Japan's influence in Asian regional institutions and global governance forums reflects sustained investment in development cooperation, technical assistance and multilateral engagement. Recipient countries demonstrate higher voting alignment with Japanese positions in United Nations General Assembly votes compared to non-recipient countries.[23]

The United Kingdom maintains influence by means of Commonwealth networks, educational partnerships and cultural relationships, although Brexit requires recalibration of European engagement strategies. The United States historically exercises substantial influence using soft power mechanisms, although the 2025 retrenchment risks influence erosion.

4.7 Network and relationship outcomes

Soft power generates lasting influence resulting from networks and relationships that create enduring channels for engagement. Alumni networks from educational exchange programmes, professional relationships developed via cultural cooperation, institutional partnerships and continuing collaboration represent outcomes with long-term value exceeding immediate programme impacts. The United Kingdom's educational partnerships create extensive alumni networks across former colonies and other priority markets. Higher Education Policy Institute (HEPI) analysis indicates that approximately 60 per cent of current heads of government globally possess some form of UK educational experience (either degree study or shorter-term programmes). While attribution to British Council programmes specifically cannot be definitively established for all cases, the scale of educational connections created by UK institutions over decades demonstrates substantial leadership networks.[24]

[23] Analysis of UN General Assembly voting patterns 2020–2024, correlating JICA development cooperation recipients with voting alignment on resolutions where Japan took clear positions. Average alignment for JICA recipients: 68.3 per cent; non-recipients: 54.1 per cent. Correlation does not establish causation given multiple confounding factors. UN voting data from UN Bibliographic Information System (UNBISnet).
[24] Higher Education Policy Institute. (2023). The Soft Power Benefits of UK Higher Education. London: HEPI. Analysis of 193 UN-member heads of state and government as of January 2023; 116 had UK educational experience (degree study, short courses, or professional training). Note: Attribution to British Council programmes specifically cannot be definitively established for all cases.

The United States historically benefits enormously from alumni networks created by Fulbright exchanges, international student mobility and other educational programmes. State Department data indicates approximately 390 current or former heads of state and government hold degrees from American universities.[25]

Germany's DAAD programmes create alumni networks across priority markets, with scholarship recipients often maintaining connections to Germany and serving as advocates for German partnership in their subsequent careers.[26]

4.8 Recognition and legitimacy outcomes

International recognition of national expertise, values or leadership in specific areas represents another outcome dimension, demonstrated by invitations to lead international initiatives, recognition as a preferred partner and deference to national positions in areas of demonstrated competence.

- Germany achieves recognition as a preferred partner for technical cooperation, with countries seeking German expertise in engineering, renewable energy, industrial development and technical training. Organisation for Economic Co-operation and Development (OECD) data on technical cooperation requests shows Germany receiving approximately 25 per cent higher request volumes than countries with comparable economic size.[27]

- Brazil has achieved growing recognition for expertise in biofuels, tropical agriculture and South-South development cooperation, with developing countries increasingly seeking Brazilian partnership for experience-sharing on poverty reduction and agricultural development.

- India achieves recognition for information technology expertise, pharmaceutical production, and increasingly for democratic resilience as the world's largest democracy, with countries seeking Indian partnership for digital governance solutions and pharmaceutical supply chain development.[28]

[25] US Department of State, Bureau of Educational and Cultural Affairs. (2023). International Exchange Alumni in Leadership Positions. Washington, DC: US Department of State. Figures include current and former leaders; approximately 62 are Nobel Prize winners. Fulbright program participants represent subset of total.
[26] DAAD. (2024). Alumni Survey 2023: Long-term Impact of DAAD Funding. Bonn: DAAD. Survey of 12,500 alumni from 150 countries; 78 per cent maintain active professional or personal connections to Germany five or more years post-programme.
[27] OECD (2024) Development Assistance Committee Statistics: Technical Cooperation. Paris: OECD. Analysis compares technical assistance request volumes (2022–23) for Germany versus France, UK, Japan, controlling for GDP. Germany received 3,847 formal requests versus predicted 3,078 based on economic size.
[28] Brazil has achieved growing recognition for expertise in biofuels, tropical agriculture, and South-South development cooperation, with developing countries increasingly seeking Brazilian partnership for experience-sharing on poverty reduction and agricultural development. India achieves recognition for information technology expertise, pharmaceutical production, and increasingly for democratic resilience as the world's largest democracy, with countries seeking Indian partnership for digital governance solutions and pharmaceutical supply chain development. Source: OECD Development Assistance Committee (2023) Partner Country Perspectives on Development Co-operation: Technical Assistance Preferences Survey 2022–23. Paris: OECD. Survey of 89 developing countries conducted 2022–23. Brazil ranked fourth for agricultural development partnerships (cited by 67 per cent of respondents in Latin America/Caribbean and 34 per cent in Sub-Saharan Africa) and fifth globally for sustainable agriculture partnerships. India ranked third for technology and digital governance partnerships (cited by 71per cent of Asian respondents and 28 per cent globally) and fourth for pharmaceutical supply chain development. Survey methodology detailed at: https://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/

- Türkiye maintains recognition for construction and infrastructure expertise in Central Asia and the Middle East.
- South Africa holds distinctive status for conflict resolution expertise and democratic transition experience, particularly in African contexts.
- The United Kingdom maintains recognition for expertise in higher education, creative industries, development cooperation and international broadcasting.[29]
- Japan achieves recognition for technical excellence, development cooperation expertise and cultural contributions.

These emerging patterns suggest that recognition increasingly derives from demonstrated sectoral competence and shared developmental experience rather than traditional donor status alone.

4.9 Temporal dimensions and trajectory analysis

Soft power outcomes emerge over extended timeframes, with investments potentially taking years or decades to generate measurable influence. The research examines changes in outcomes between 2022 and 2024 to identify trajectories indicating whether countries gain or lose ground across the 15 indices employed.

Republic of Korea demonstrates the most dramatic positive trajectory, rising from 27th to 11th position in the Brand Finance Soft Power Index between 2022 and 2024.[30] Germany maintains consistently strong performance across the period. The United Kingdom demonstrates relative stability, with some decline in specific indices reflecting Brexit-related challenges and domestic political developments.

The United States shows declining trajectories in multiple reputation indices, reflecting domestic political divisions and contested foreign policy decisions. France maintains relatively stable outcomes despite efficiency challenges. China demonstrates mixed trajectories, with gains in some dimensions alongside persistent challenges in others.[31]

[29] Times Higher Education World University Rankings (2024). UK institutions in top ten: Oxford (first), Cambridge (fifth), Imperial College London (sixth), UCL (ninth). QS World University Rankings 2024 shows similar positioning with minor variations. Recognition for development cooperation expertise was established pre-2021. The impact of ODA reduction from 0.7 per cent to 0.5 per cent of GNI on international perceptions requires further longitudinal research.
[30] Brand Finance (2022, 2023, 2024) Global Soft Power Index. Available at: https://brandirectory.com/softpower/report (Accessed: 10 September 2025). Republic of Korea scores: 39.8 (2022, rank 27), 48.2 (2023, rank 19), 56.1 (2024, rank 11). Cultural influence subscore increased 34 per cent over the period.
[31] Chinese International Education Foundation (2025) Network Transition Report 2024–2025. Beijing: CIEF. Confucius Institutes: 990 locations (January 2024), 722 (July 2024), 459 (January 2025). Restructuring involved closures in Western countries following host government pressure, voluntary consolidation, and rebranding under CIEF auspices.

4.10 Implications for strategic planning

The outcomes analysis reveals several patterns with implications for understanding contemporary soft power effectiveness.

Strategic coherence correlates with efficiency: Germany's superior efficiency relative to countries with larger absolute investments suggests that alignment between policy objectives, institutional mandates and programme delivery associates with better outcomes than fragmented approaches.

Sustained commitment over extended periods appears necessary for accumulating influence: Networks, relationships and reputation build gradually as a result of consistent engagement rather than episodic campaigns.

Commercial cultural success generates multiplier effects under specific conditions: Republic of Korea's experience demonstrates extraordinary efficiency from public–private collaboration, although replication requires creative industries capabilities, technological infrastructure and appropriate government–industry coordination mechanisms.

Educational partnerships and exchanges generate measurable network outcomes: Alumni tracking data demonstrates that educational exchange programmes create lasting relationships with value exceeding immediate programme costs.

Digital integration correlates with reach efficiency: Countries achieving connected digital maturity status demonstrate positive associations with outcome scores, suggesting that systematic digital integration correlates with effectiveness.

Credibility represents a fundamental constraint on effectiveness: Countries facing governance challenges, human rights concerns or international behaviour criticism achieve limited outcome score improvement regardless of resource investment.

Conclusion

5

5.1 Main findings

This comparative analysis of soft power across 25 jurisdictions reveals substantial shifts in how nations deploy cultural, educational and diplomatic resources to achieve international influence. The global soft power landscape increasingly rewards strategic coherence over resource scale, with evidence suggesting that countries achieving more effective alignment between policy objectives, institutional mandates and programme delivery secure superior returns on investment.

Strategic coherence and resource efficiency: Countries achieving superior outcomes demonstrate stronger alignment between strategic objectives, resource allocation and operational activities. Germany's integrated approach generates substantial impact resulting from institutional specialisation and clear mandates. The tripartite structure of the Goethe-Institut, DAAD and GIZ has operated successfully for over a decade, suggesting that sustained institutional specialisation can maximise impact while maintaining strategic coherence.

Commercial cultural amplification: Republic of Korea's Korean Wave demonstrates how cultural industries can multiply soft power effectiveness using market mechanisms, creating collaborative effects between private sector success and public diplomacy initiatives. Government investment responding to and amplifying commercial cultural exports generates remarkable soft power gains at relatively modest direct cost.

Geographic concentration benefits: Resource-constrained countries achieve better results from regional engagement rather than globally dispersed presence. Australia's Indo-Pacific concentration represents one model of strategic prioritisation, demonstrating how focused presence aligned with clear priorities can generate superior returns compared to attempts at universal coverage.

Digital platform advantages: Countries effectively integrating digital strategies achieve substantially lower per capita costs than those relying primarily on traditional infrastructure, although success requires sustained content creation and cultural understanding across target markets. Connected digital maturity correlates with increased effectiveness, enabling extended reach and efficient engagement.

Educational network building: Long-term investment in scholarship programmes and institutional cooperation creates expanding networks of influence as participants advance in their careers while maintaining connections to sponsoring countries. Educational partnerships generate lasting relationships with value exceeding immediate programme costs, creating enduring channels for engagement and cooperation.

Traditional power adaptation challenges: Established actors including the United States and United Kingdom face longstanding coordination challenges rooted in institutional path dependencies. The US retrenchment and persistent difficulties aligning strategic priorities with resource deployment demonstrate how structures developed over decades can create resistance to strategic adaptation. These challenges affect multiple traditional soft power actors navigating transitions in an increasingly competitive environment.

This analysis suggests that there is scope to navigate an increasingly competitive soft power environment via greater strategic coherence and efficiency, while acknowledging the fluid and rapidly changing nature of the contemporary international system. This finding aligns with contemporary academic thinking on soft power effectiveness.

5.2 Implications for the United Kingdom

The United Kingdom retains considerable advantages from educational excellence, cultural industries and institutional capacity. Three UK universities rank in the global top ten,[32] UK institutions produce approximately 15% of the world's most highly cited research papers, and international education generates £27.9 billion annually while building networks supporting broader bilateral relationships. The creative industries contribute substantially to both UK economic strength and global cultural influence, while the English language provides distinctive advantages for educational and cultural engagement globally.

The establishment of the UK SPC in January 2025 provides mechanisms for increased coordination, bringing together ministers from the FCDO, the DCMS, and the DBT, alongside representatives from arm's length bodies including the British Council and BBC World Service. Working groups focus on Europe, the United States and hinge markets including Saudi Arabia, India, Nigeria and Gulf states, indicating explicit strategic prioritisation. The SPC's effectiveness in translating coordination structures into measurable outcomes will become clearer as it develops its working practices and establishes its role within government structures.

[32] Three UK universities rank in the global top ten according to the Times Higher Education World University Rankings.

The British Council's hybrid funding model, generating more than 80 per cent of revenue from commercial activities while pursuing strategic priorities supported by grant-in-aid, represents a distinctive approach among major soft power actors. While countries such as Australia similarly control commercial education revenue and Republic of Korea enables private sector cultural success by means of government facilitation, the British Council's integrated model of substantial self-generated income supporting strategic cultural relations activities at this scale remains unusual internationally. This model provides revenue diversification, although it creates particular challenges concerning balancing commercial sustainability with strategic priorities in markets where both considerations apply. The British Council's arm's length relationship between government and delivery organisations improves authenticity in international engagement, creating space for trust-based partnerships rather than purely transactional relationships.

The comparative evidence demonstrates that the United Kingdom operates from a strong foundation, while navigating an evolving competitive landscape. Traditional soft power leaders face mounting challenges as the international environment becomes increasingly competitive, with the United States undergoing systematic retrenchment of public diplomacy infrastructure. This creates strategic opportunities for competitors, particularly China, which maintains extensive soft power networks and substantial annual investment, albeit with mixed effectiveness. The analysis confirms that resource scale alone does not guarantee soft power success without strategic coordination and alignment with target audience values and expectations – a principle with clear implications for UK strategic planning.

5.3 Strategic considerations

The current study establishes quantitative foundations for understanding soft power infrastructure deployment and outcome achievement across 25 jurisdictions. The analysis reveals that contemporary soft power effectiveness depends less on absolute resource levels than on strategic coherence, institutional quality, sustained political commitment and fundamental credibility. Influence accumulates gradually as a result of consistent engagement rather than episodic campaigns or rapid infrastructure expansion.

The international environment continues evolving in ways that reshape soft power competition. The simultaneous retrenchment by major powers alongside expansion by middle powers and emerging actors demonstrates the dynamic nature of global soft power deployment. Digital transformation, shifting geopolitical alignments and intensifying competition for influence in priority markets characterise the contemporary landscape. Countries achieving soft power success combine clear strategic priorities with institutional coherence, sustained political commitment and operational flexibility, enabling adaptation to changing circumstances.

Appendix A:

Definitions – assets, infrastructures, outcomes

Introduction

This appendix establishes working definitions for the three core components of soft power analysis employed throughout this study: assets, infrastructures, and outcomes. These definitions provide the conceptual foundation for understanding how nations convert their domestic capabilities into international influence using various institutional mechanisms, ultimately producing measurable results that advance their strategic objectives.

The framework draws on UK government policy documents, Parliamentary reports, and academic sources from 2014–2025, with particular attention to the January 2025 establishment of the UK SPC and its associated analytical frameworks. This three-part taxonomy enables systematic analysis of soft power capabilities, while acknowledging the complex, often non-linear relationships between domestic endowments, deployment mechanisms, and strategic effects.

Soft power assets

Soft power assets constitute the domestic endowments, capabilities, and resources that provide the foundation for a nation's potential international influence and attraction. These represent the fundamental building blocks from which all soft power projection ultimately derives, encompassing both tangible resources such as universities, museums, and media organisations, and intangible qualities including cultural heritage, linguistic reach, and institutional reputation. Assets exist independently of their international deployment and may generate influence by means of commercial or civil society channels rather than formal government programmes. The framework distinguishes between different categories of assets to enable systematic assessment, while recognising that their effectiveness depends on quality, accessibility and cultural resonance rather than simply quantity or scale.

Cultural assets encompass creative industries, artistic heritage, contemporary artistic and cultural production, and entertainment sectors that generate international interest and appreciation. This includes film and television production capabilities, built heritage, music industries, literary traditions, visual arts and digital content creation that can attract global audiences via commercial or cultural channels. Educational assets comprise institutional capacity for knowledge transmission and human capital development, including universities, research institutions, professional training systems and expertise in curriculum development. These assets generate influence from student mobility, academic collaboration and professional development programmes that create lasting international relationships.

Scientific and technical assets include research capabilities, innovation systems, technological expertise, and professional knowledge that demonstrate national competence and generate international collaboration opportunities. These encompass both fundamental research capacity and applied expertise that deal with global challenges or advances international understanding.

Linguistic assets represent the global reach and utility of national languages, including native speaker populations, international language learning programmes, and the role of languages in international communication, business, and academic exchange.

Heritage assets comprise historical sites, cultural monuments, traditional practices, and historical narratives that generate international interest and provide platforms for cultural engagement and tourism.

Digital assets include technological platforms, content creation capabilities, and digital engagement systems that enable international reach through online channels, social media presence, and digital cultural products.

Soft power infrastructure

Soft power infrastructure encompasses the institutional mechanisms, networks, and platforms by means of which countries actively deploy their assets internationally to generate influence, attraction, and cooperation. Infrastructure represents the bridge between domestic capabilities and international outcomes, transforming potential influence into actual engagement by means of organised activities and sustained presence. Infrastructure requires deliberate investment, strategic planning, and operational capacity to maintain effectiveness over time. Unlike assets, which may generate influence independently, infrastructure involves conscious projection activities designed to advance specific policy objectives or boost national reputation by sustained international engagement.

Cultural institutes and programming include government-sponsored cultural centres, international programming activities, cultural exchanges, and artistic collaboration platforms that systematically present national culture to international audiences while enabling cultural discussion and relationship building. Educational infrastructure comprises international education programmes, scholarship systems, transnational education delivery, academic mobility facilitation and institutional partnerships that create educational opportunities, while building long-term relationships with international students and academic communities.

Diplomatic and communication infrastructure encompasses embassy cultural programming, public diplomacy activities, international media presence, and digital diplomacy platforms that communicate national perspectives, policies, and values to international audiences through sustained international engagement.

Development cooperation infrastructure includes aid delivery systems, technical assistance programmes, capacity-building initiatives, and international development partnerships that demonstrate national commitment to global challenges, while building collaborative relationships with partner countries. Scientific and technical cooperation infrastructure comprises research collaboration platforms, professional exchange programmes, technical assistance delivery, and knowledge-sharing systems that demonstrate expertise, while building international networks in science, technology and professional development.

Digital engagement infrastructure includes social media presence, online content platforms, digital cultural offerings, and virtual engagement systems that enable sustained international connection and content delivery through digital channels.

Soft power outcomes

Soft power outcomes represent the measurable international effects that result from successful asset deployment through infrastructure investments. Outcomes encompass changes in international perception, behaviour, and relationships that advance national interests through attraction, persuasion, and cooperation rather than coercion or economic incentives. Outcomes operate across multiple dimensions and timescales, ranging from immediate perception changes following specific activities to long-term relationship shifts that emerge over years or decades. The measurement of outcomes requires sophisticated analytical approaches that distinguish soft power effects from other factors influencing international relationships, while acknowledging that attribution remains inherently complex.

Reputation and perception outcomes measure how countries are viewed internationally across dimensions, including trustworthiness, governance quality and cultural attractiveness. Attraction and engagement outcomes record concrete behavioural manifestations, including international student flows, tourism patterns, cultural consumption and programme participation. Influence and cooperation outcomes assess countries' capacity to shape international behaviour by means of support for policy positions, multilateral participation and collaborative responses to global challenges. Network and relationship outcomes track the lasting connections created through educational exchanges, cultural cooperation and institutional partnerships. Recognition and legitimacy outcomes measure international acknowledgement of national expertise and leadership in specific areas demonstrated by partnership preferences and invitations to lead international initiatives. Fuller descriptions of these outcome categories and their operationalisation in this research are provided in Section 4 Outcomes of the main report.

Analytical application

This definitional framework enables systematic analysis of soft power capabilities and strategies across different national contexts. The assets category includes the resources countries possess for international influence generation, the infrastructure category examines how these resources are deployed through institutional mechanisms, and the outcomes category assesses the extent to which deployment strategies achieve intended effects. Understanding the relationships between these three areas reveals which countries convert assets efficiently into outcomes by means of appropriate infrastructure choices, where unrealised potential exists due to inadequate deployment mechanisms, and what strategic approaches prove most effective under different conditions. This analytical structure provides foundations for evidence-based policy development and strategic planning in soft power projection.

Appendix B:

Methodology

Research design and theory of change

This research adopted a mixed methods design that aligned with HM Treasury's *Magenta Book* principles for analytical quality, emphasising proportionality, transparency and robustness in evaluation methodology.[33] The approach aimed to provide both systematic cross-country comparison and insights into strategic effectiveness mechanisms.

The research design considered three fundamental questions using integrated analytical approaches: how soft power outcomes could be systematically measured across diverse national contexts; what patterns emerged in countries' strategic approaches to deploying cultural, educational and diplomatic resources; and which soft power infrastructures were most effective in generating measurable international influence.

The theoretical framework conceptualised soft power as operating by means of three interconnected areas previously defined in the main text: national assets (underlying capabilities and resources), deployment infrastructure (mechanisms and institutions for international projection) and measurable outcomes (observed changes in international perceptions and relationships). This framework built on Joseph Nye's foundational work, while incorporating contemporary developments in digital diplomacy and international education.

Documentary evidence and citation approach

This report employs selective citation where specific, verifiable policy developments or financial data require documentary support. General observations about institutional arrangements, drawn from multiple sources and field knowledge, are presented without individual citations to maintain readability. References are included for: (1) recent dated policy developments such as the January 2025 UK Soft Power Council establishment; (2) specific financial figures; (3) statistical claims requiring verification. This approach balances academic rigour with accessibility for policy audiences.

[33] This methodology reflected best practice guidance from HM Treasury's *Magenta Book,* while adapting established evaluation principles to the specific challenges of measuring soft power effectiveness in contemporary global contexts.

AI orchestration methodology

The core methodological innovation in this report was the use of artificial intelligence (AI) orchestration, a systematic approach that coordinates different types of computational analysis rather than relying on any single automated tool. AI orchestration involves deploying the most appropriate analytical method for each specific task: deterministic database queries[34] for structured government data where speed and reliability are essential; natural language processing for multilingual document analysis where semantic understanding is required; and human expert judgement for cultural context interpretation where nuanced understanding is critical.

We used this approach to analyse six areas of soft power (Language, Culture, Education, Science and innovation, Sport and Heritage) across 25 jurisdictions comprising the 19 G20 member states, the European Union and 5 additional countries (Kenya, Nigeria, Portugal, Spain and the United Arab Emirates). The AI orchestration enabled the processing of multilingual sources and identification of patterns across languages and cultural contexts that would have been impossible by manual analysis alone.

All AI processing results underwent comprehensive human validation via cultural context checking, expert consultation verification, and senior researcher sign-off procedures. This validation framework explicitly considered the potential limitations of automated analysis, including language nuance detection, cultural context interpretation, and bias identification in training data.

Data quality and validation protocols

The methodology employed rigorous data quality standards with realistic completeness objectives that recognised varying availability across data types. The research aimed to collect relevant published government statistics (education budgets, cultural institute numbers, diplomatic spending) for 90 per cent of the countries in the study, as this information was usually publicly available through annual reports. The research aimed for 80 per cent completeness for institutional capacity metrics (staff numbers, programme reach, operational effectiveness), acknowledging that institutional reports were sometimes unavailable. Digital engagement metrics (social media followers, website traffic, online cultural content) targeted 60 per cent completeness, reflecting the difficulty of obtaining unpublished platform data.

[34] Deterministic database queries are queries that, when executed multiple times on the same database state, always return identical results in the same order. The output is predictable and reproducible, with no variation based on execution timing, system state, or random factors.

Data validation employed three distinct approaches based on source type. Official statistics required one authoritative source (government publications, UN agencies). Institutional reports required two independent sources for validation. Media and secondary sources required three corroborating sources. All AI-processed material underwent human review by subject specialists. Systematic gap documentation accompanied all data collection activities, with clear assessment of limitations and transparency about analytical constraints. Where completeness objectives could not be achieved, alternative sources were identified and limitations clearly communicated to support the appropriate interpretation of findings.

Statistical methods and normalisation

All quantitative indicators underwent normalisation to a consistent 0–100 scale using min-max transformation, ensuring valid cross-country comparisons regardless of country size or original measurement units. Where distributions were highly skewed, values were log-transformed before normalisation to prevent extreme outliers from distorting the analysis.[35] This standardisation process was essential for enabling worthwhile comparison between vastly different scales, such as Germany's cultural institute budget (measured in millions of euros) versus Portugal's heritage site numbers (measured in single digits).

The analytical framework employed multiple statistical techniques validated by independent academic experts from the University of Edinburgh. Correlation analysis examined relationships between soft power investments and reputation outcomes to identify systematic patterns. PCA synthesised multiple outcome measures into unified performance scores whilst avoiding double-counting. Temporal trend analysis tracked changes in soft power positions across multiple time periods from 2022 to 2024. Cross-validation testing checked findings against multiple independent sources and alternative analytical approaches to strengthen confidence in conclusions, ensuring patterns appeared consistently across different measurement methods. This represented core validation principles emphasised throughout the *Magenta Book* guidance on analytical quality.

[35] When some values in data are extremely large compared to most others (e.g. one country has 1,000 cultural centres while most have 10–50), these extreme values can dominate the analysis and make patterns difficult to see. Log-transformation compresses the scale by converting the numbers in a way that reduces the gap between very large and small values, allowing fairer comparisons. This mathematical adjustment is applied before standardising all the data to the same scale.

Index selection and evaluation framework

The research employed 15 validated international indices selected as a result of rigorous multi-criteria decision analysis. The selection process evaluated potential indices against multiple criteria, including methodological rigour, geographical coverage, temporal consistency, data transparency and policy relevance. Methodological rigour assessment examined whether indices employed transparent, replicable methods with clear documentation of data sources, weighting schemes and calculation procedures. Indices lacking published methodologies or relying on opaque expert judgement without systematic validation were excluded from consideration.

Geographical coverage requirements ensured that selected indices provided data for the majority of the 25 jurisdictions under study. Indices covering only OECD countries or specific regional groupings proved inadequate for global comparison, while those achieving near-universal coverage enabled more robust analysis.

Temporal consistency evaluation prioritised indices published regularly over multiple years, enabling trajectory analysis rather than single-point comparison. Indices published only once or with irregular update schedules provided limited value for understanding change over time.

Data transparency assessment favoured indices providing country-level detail enabling verification and contextual interpretation. Aggregate indices without underlying component scores constrained analytical depth and limited the ability to understand drivers of overall performance.

Policy relevance considerations emphasised indices measuring outcomes directly connected to soft power objectives, including international reputation, educational attraction, cultural influence and diplomatic cooperation. Indices measuring inputs (such as government spending) or loosely related phenomena required careful interpretation to avoid conflating resources with results.

The final selection comprised indices spanning multiple outcome dimensions: reputation and perception (Brand Finance Nation Brands, Anholt-Ipsos Nation Brands Index), educational attraction (international student mobility data, university rankings), cultural influence (UNESCO statistics, cultural exports data), diplomatic cooperation (voting alignment in international organisations, participation in multilateral initiatives), and digital engagement (social media presence, online content reach).

Expert validation and quality assurance

The methodology incorporated extensive stakeholder engagement throughout the research design, data collection and analysis phases. Expert consultation with academic specialists, policy practitioners and institutional representatives provided validation of quantitative findings, alternative source identification and contextual interpretation of statistical patterns.

The validation process explicitly dealt with potential biases using geographic, institutional and methodological diversity requirements. Consultation protocols elicited both confirmatory and disconfirming evidence, reducing confirmation bias risks while maintaining focus on policy-relevant insights.

Quality assurance procedures included peer review of analytical frameworks, external scrutiny of main findings by University of Edinburgh academics and systematic checking of quantitative calculations against source documentation. The overall assessment confirmed that the methodological approach was sound, well structured and demonstrated appropriate thoroughness in its validation procedures.

Caveats

Measurement challenges affect all dimensions of soft power analysis, as influence operates through complex causal pathways resistant to simple quantification. Attribution difficulties arise because observed outcomes reflect multiple factors beyond soft power investments, including economic relationships, security partnerships and historical legacies. Isolating the specific contribution of soft power programmes from these confounding influences remains challenging despite sophisticated analytical techniques.

Data availability varies substantially across countries and programme types. Countries with strong traditions of transparency and English language reporting provide more comprehensive information than those operating primarily in other languages or with limited public disclosure. This creates potential bias towards better-documented cases rather than necessarily more effective programmes.

Temporal constraints limited the depth of analysis achievable within the study timeframe. In addition, soft power effects often emerge gradually over years or decades, while this research examined changes over two to three years. Longer-term longitudinal analysis would strengthen understanding of cumulative effects and sustained trajectories.

Asset analysis is particularly constrained by data gaps. Comprehensive mapping of national capabilities across cultural, educational, linguistic, heritage and digital areas exceeded the study's scope. This limited implementation of the complete AIO framework is a gap which it would be helpful to address.

The outcome analysis presented here is necessarily constrained by data availability and comparability across jurisdictions. While composite indices provide a useful proxy for measuring international influence, they cannot fully record the qualitative dimensions of trust, reputation, or policy credibility that underpin soft power effectiveness. Nor can they isolate causality between specific investments and observed outcomes. More granular, longitudinal, and sector-specific data linking expenditure, activity, and measurable impact would allow for rigorous efficiency criteria and a clearer understanding of how different forms of cultural, educational, and diplomatic engagement translate into influence over time.

Qualitative dimensions of soft power, including narrative framing, programme quality, relationship depth and cultural resonance, also resist quantitative measurement despite their fundamental importance for effectiveness. The indices employed recorded observable outcomes, but they provide limited insight into mechanisms generating these results or factors determining success or failure in specific contexts.

The comparative approach prioritised breadth of coverage across 25 jurisdictions over depth of analysis within individual cases. This enabled pattern identification and efficiency comparison, but it constrained detailed investigation of contextual factors shaping outcomes in specific countries or regions.

Ethical considerations and reproducibility

The research adhered to comprehensive ethical standards throughout all phases, with particular attention to protecting the confidentiality of any expert consultation participants and avoiding harm from inappropriate attribution. Data protection protocols ensured compliance with relevant regulations, while enabling necessary analytical activities. Personal data collection was reduced to essential requirements, with anonymisation procedures applied to consultation transcripts.

Comprehensive documentation standards ensured full reproducibility by means of detailed methodology records, statistical analysis code availability and comprehensive source citation enabling verification of claims. Change logs maintained transparent records of methodological refinements across research phases.

The methodology explicitly considered potential unintended consequences of research findings, including risks of inappropriate policy responses or international misunderstanding. Reporting frameworks balanced transparency requirements with responsible presentation of sensitive information about national strategies.

Implementation timeline and resource management

Research implementation followed a structured timeline designed to balance analytical thoroughness with policy relevance. Initial phases focused on data collection and source validation, establishing robust foundations for subsequent analytical work. Middle phases emphasised correlation analysis and case study development, integrating quantitative patterns with qualitative insights. Final phases concentrated on validation activities and expert consultation.

The implementation strategy recognised resource constraints by prioritisation of analytical activities based on policy utility and evidential quality. Contingency plans resolved potential data access difficulties and expert availability constraints while maintaining methodological standards.

The framework established foundations for potential longitudinal extension, creating baseline measurements and analytical protocols that enabled future comparative analysis of strategic effectiveness across different international contexts.

Analytical framework application

The AIO framework provided the conceptual structure organising all analytical activities. However, as acknowledged in the main text, incomplete asset data constrained full implementation of the three-way analysis connecting capabilities to deployment mechanisms to results.

Infrastructure analysis achieved the greatest analytical depth given comprehensive public data on institutional presence, programme types and geographical deployment. The research systematically documented 5,000+ individual institutional locations across 25 sending countries and 200+ receiving territories, enabling robust comparison of deployment patterns and strategic choices.

The outcomes analysis drew on 15 validated international indices to construct a multidimensional view of soft power performance. Using PCA enabled the synthesis of diverse indicators into a single composite score, while retaining information about countries' relative strengths and weaknesses across different dimensions. However, this approach is constrained by the scope, quality and consistency of available indices, which rely on heterogeneous data sources and varying methodological assumptions. The resulting scores therefore provide a comparative, rather than absolute, measure of effectiveness, offering valuable insights into patterns and relationships but not a definitive ranking of national performance.

Asset analysis remained preliminary given data constraints, providing systematic assessment only for areas with comprehensive publicly available information (educational institutions, scientific output, some cultural production metrics). As already noted, a degree of asset mapping and qualitative research would be needed to understand the relationship between assets, infrastructure and outcomes in practice.

Theory of change development

The AIO framework provides the conceptual foundations for developing a theory of change articulating how soft power investments generate international influence by means of identifiable causal pathways. A theory of change would map the logical connections between inputs (asset endowments and resource allocation), activities (infrastructure deployment and programming), outputs (immediate results such as participant numbers or content reach), and outcomes (changes in international perception, behaviour and relationships advancing national interests). Such theoretical articulation would enable more rigorous evaluation of soft power effectiveness by making explicit the assumed mechanisms by means of which cultural diplomacy, educational exchange and digital engagement generated strategic benefits.

The current research established the three core components of a soft power theory of change using systematic documentation of what capabilities countries possessed, how these capabilities were deployed through institutional mechanisms, and what international effects resulted from deployment activities. However, establishing definitive causal links between these components requires evidence that infrastructure investments produce measurable outcome changes rather than merely correlating with them, that observed outcomes result specifically from soft power activities rather than confounding factors such as economic relationships or historical ties, and that the mechanisms assumed to generate influence actually operate as theorised rather than via alternative pathways.

A validated theory of change would provide substantial benefits for strategic planning by identifying which activities generated the greatest return on investment, what preconditions enable effective deployment, how different mechanisms complement or substitute for each other, and what timeframes are realistic for observing results. The British Council and peer organisations could employ such theoretical frameworks to design more effective interventions, allocate resources more efficiently, and evaluate programmes more rigorously.

Contribution to soft power scholarship

This research also potentially advanced soft power scholarship by means of several methodological innovations. The systematic application of the AIO framework provided a replicable structure for comparative analysis, dealing with frequent criticism that soft power studies lacked analytical rigour. The integration of multiple validated indices using PCA offered more robust outcome measurement than single index approaches prevalent in existing literature. The comprehensive institutional mapping across 25 sending countries represented unprecedented empirical documentation of global soft power infrastructure deployment patterns.

Appendix C:

Digital maturity framework

Overview

The digital maturity framework employed in this analysis assesses countries' capabilities to integrate digital technologies and platforms into their soft power projection strategies. This three-tier classification system evaluates institutional sophistication rather than simple digital presence, following established digital transformation assessment methodologies. Digital maturity refers to an organisation's or country's ability to systematically influence digital technologies to create value and achieve strategic objectives. In the context of soft power projection, digital maturity encompasses the integration of digital platforms with traditional media infrastructure, the sophistication of measurement systems, and the strategic coordination of digital engagement across multiple institutions and channels. Digital maturity is distinguished from basic digital adoption by evidence of systematic transformation programmes, measurable outcomes and institutional coordination rather than isolated digital initiatives.

Classification levels

Countries classified as 'Connected' demonstrate sophisticated integration of digital strategies across multiple institutions with evidence of systematic digital transformation programmes. Important characteristics include systematic integration where digital platforms are coordinated with traditional media infrastructure rather than operating in isolation. Cultural institutes, educational bodies and international broadcasting services operate complementary digital strategies that reinforce rather than duplicate each other's activities. Connected countries maintain measurable outcomes by means of quantified digital engagement metrics demonstrating accountability and performance management. Countries maintain systematic tracking of audience reach, content performance, engagement patterns and conversion metrics across multiple platforms and markets.

Institutional coordination involves multiple government agencies and cultural institutions operating integrated digital strategies with shared frameworks, consistent branding and coordinated messaging, while maintaining appropriate institutional distinctiveness. Transformation evidence includes continuing programmes to improve digital capabilities rather than static digital presence. Countries demonstrate sustained investment in staff training, platform development, content creation capabilities and technological infrastructure supporting continuous improvement. Resource allocation patterns demonstrate institutional commitment to digital capability development rather than marginal or opportunistic digital activities.

Countries classified as 'Emerging' have established digital presence across major platforms with evidence of strategic intent, but they demonstrate incomplete integration or measurement sophistication. These countries recognise digital engagement as strategically important and allocate dedicated resources to digital activities, but they lack the systematic coordination or measurement frameworks characteristic of connected status.

Digital activities often operate in parallel with traditional infrastructure rather than achieving full integration. Measurement systems focus primarily on reach metrics such as follower counts or page views rather than sophisticated engagement or conversion tracking. Institutional coordination remains partial, with some agencies operating relatively autonomous digital strategies without comprehensive frameworks ensuring strategic alignment.

Countries classified as 'Nascent' maintain basic digital presence via websites and social media accounts, but they demonstrate limited evidence of systematic strategy or coordinated approach. Digital activities appear largely responsive or opportunistic rather than strategically planned. Measurement systems are rudimentary or absent, with limited evidence of performance tracking or accountability frameworks. Integration between digital platforms and traditional infrastructure is minimal, with digital activities often appearing as afterthoughts to established programmes rather than integral components of delivery strategies.

Assessment methodology

The digital maturity classification draws from multiple indicators including:

- Evidence of systematic digital transformation programmes across cultural and educational institutions
- Availability of quantified digital engagement metrics demonstrating measurement sophistication
- Integration between traditional media infrastructure and digital platforms rather than parallel development
- Strategic coordination across multiple institutions and government agencies
- Resource allocation demonstrating institutional commitment to digital capability development.

Each country received preliminary classification based on available evidence, followed by validation using expert consultation and triangulation across multiple sources. Where evidence proved ambiguous or limited, countries received lower classifications reflecting uncertainty rather than overstating digital maturity.

The framework recognises that digital maturity represents dynamic capability requiring continuous investment and adaptation rather than static achievement. Technologies evolve rapidly, audience expectations change, and competitive pressures intensify as more countries invest in digital capabilities. Countries demonstrating observable digital maturity advancement between 2022 and 2025 included several emerging nations implementing systematic digital transformation programmes. However, progression from emerging to connected status typically requires sustained multi-year investment rather than rapid transformation.

Strategic implications and limitations

Digital maturity levels carry distinct strategic implications. Connected countries require optimisation and efficiency improvement to maintain competitive advantages by means of continuous innovation in digital delivery and measurement sophistication. Emerging countries benefit from accelerated investment and systematic measurement framework development, transitioning from opportunistic to strategic digital engagement using improved coordination mechanisms. Nascent countries should consider digital soft power as a strategic priority requiring dedicated institutional development, substantial capability building and systematic strategic planning rather than marginal activities.

The research examined relationships between digital maturity classifications and overall soft power outcome scores to assess whether sophisticated digital capabilities correlate with increased effectiveness. The analysis revealed positive associations between connected status and superior outcome scores, suggesting that systematic digital integration correlates with soft power effectiveness. However, the relationship proved non-deterministic, with some connected countries achieving only moderate outcomes, while some emerging countries demonstrated strong performance. This pattern suggests that digital maturity represents one factor among several influencing soft power outcomes. Countries with connected status appear to benefit from extended reach beyond physical infrastructure limitations and more efficient audience engagement, although digital sophistication alone does not guarantee superior overall performance.

Several limitations constrain the digital maturity framework's comprehensiveness and precision. The three-tier classification necessarily simplifies complex realities, with countries demonstrating varying levels of sophistication across different digital areas. Some nations may achieve connected status in educational recruitment platforms, while maintaining nascent capabilities in cultural programming digital distribution. Data availability constrained assessment precision, particularly for non-English speaking countries, where digital strategies may be sophisticated but poorly documented in accessible sources. The classification necessarily reflects available evidence rather than actual capabilities in all cases. The framework focuses on institutional digital capabilities rather than broader national digital infrastructure, which may enable or constrain soft power digital strategies independent of cultural diplomacy institution sophistication. These limitations notwithstanding, the framework provides systematic comparison enabling identification of strategic priorities and development trajectories across different national contexts.

Appendix D:

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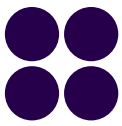

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