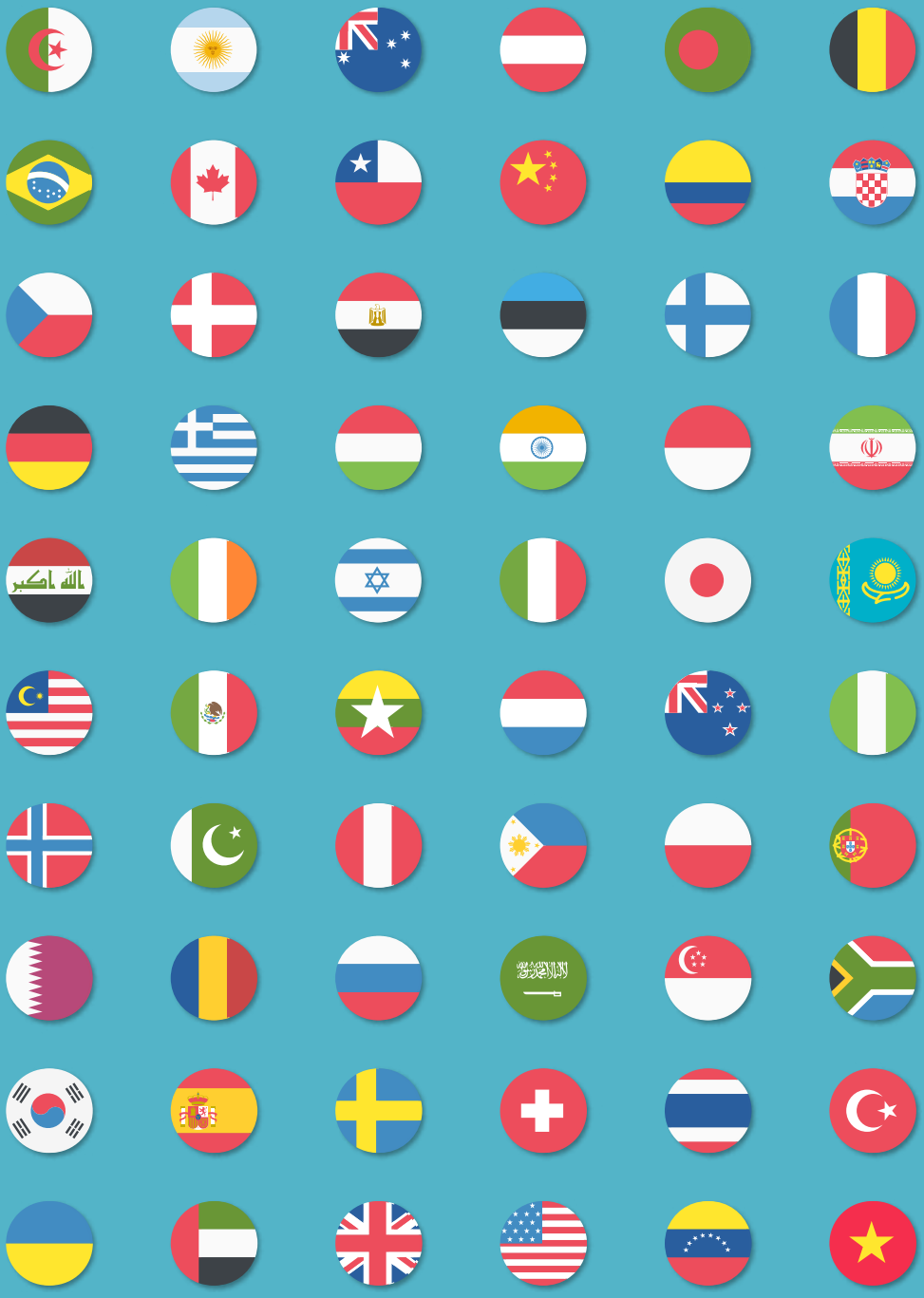
Brand Finance®

Global Soft Power Index 2020

The world's most comprehensive research study on perceptions of soft power



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Global Soft Power Index 2020

The world's top 60 soft power nations, scored out of 100

1 UNITED STATES Score **67.1**	2 GERMANY Score **61.9**	3 UNITED KINGDOM Score **61.8**	4 JAPAN Score **60.2**
5 CHINA Score **58.7**	6 FRANCE Score **58.5**	7 CANADA Score **54.5**	8 SWITZERLAND Score **54.5**
9 SWEDEN Score **51.9**	10 RUSSIA Score **51.0**	11 ITALY Score **49.3**	12 NETHERLANDS Score **48.9**
13 AUSTRALIA Score **48.8**	14 SOUTH KOREA Score **48.3**	15 DENMARK Score **47.7**	16 SPAIN Score **47.6**
17 NORWAY Score **47.3**	18 UNITED ARAB EMIRATES Score **45.9**	19 BELGIUM Score **45.5**	20 SINGAPORE Score **44.8**
21 FINLAND Score **44.8**	22 NEW ZEALAND Score **43.5**	23 AUSTRIA Score **43.5**	24 IRELAND Score **43.0**
25 ISRAEL Score **42.6**	26 SAUDI ARABIA Score **41.9**	27 INDIA Score **41.6**	28 PORTUGAL Score **40.6**

29 BRAZIL Score **39.4**	30 TURKEY Score **39.4**	31 QATAR Score **38.5**	32 THAILAND Score **37.6**
33 MALAYSIA Score **37.4**	34 GREECE Score **36.6**	35 POLAND Score **36.6**	36 SOUTH AFRICA Score **36.4**
37 MEXICO Score **35.6**	38 EGYPT Score **34.8**	39 CZECH REPUBLIC Score **34.4**	40 ARGENTINA Score **33.9**
41 INDONESIA Score **33.4**	42 PHILIPPINES Score **32.5**	43 CROATIA Score **32.4**	44 CHILE Score **32.2**
45 HUNGARY Score **31.9**	46 UKRAINE Score **31.7**	47 ESTONIA Score **31.7**	48 IRAN Score **31.5**
49 COLOMBIA Score **31.5**	50 VIETNAM Score **31.3**	51 PERU Score **30.8**	52 ROMANIA Score **30.4**
53 PAKISTAN Score **29.7**	54 ALGERIA Score **29.0**	55 VENEZUELA Score **28.8**	56 NIGERIA Score **28.8**
57 BANGLADESH Score **28.5**	58 KAZAKHSTAN Score **27.7**	59 IRAQ Score **27.7**	60 MYANMAR Score **27.5**



Ban Ki-moon
8th Secretary-General
of the United Nations

Welcome from Ban Ki-moon

Global Soft Power Summit 2020

It is my great honor to be with you at Brand Finance's Global Soft Power Summit 2020 here in dynamic, global London.

And it is my privilege to deliver these remarks at such an important juncture as we strive to leverage the great utility of soft power and build a more peaceful and sustainable world.

Today's event is very timely as it offers us an invaluable opportunity to take stock of the state of soft power in 2020, and further harness its cost-effective and transformational potential as the world is at a crossroads.

I take this opportunity to show my deep appreciation to Brand Finance for having me here today. I also extend my warmest congratulations on the occasion of the unveiling of the inaugural Global Soft Power Index by Brand Finance.

Building on the strength of the Brand Finance Nation Brands Report, and featuring the opinions of over 55,000 people based in more than 100 countries, I am confident that the Global Soft Power Index will serve as a great contribution to the theory and practice of diplomacy and foreign policy moving forward.

Today, I wish to share some insights with you based on my experience as UN Secretary-General. First, I will discuss the importance of soft power. And second, I will highlight some areas where soft power can support multilateralism, bring people together, and help construct a more peaceful and sustainable world.

Building on the strength of the Brand Finance Nation Brands Report, and featuring the opinions of over 55,000 people based in more than 100 countries, I am confident that the Global Soft Power Index will serve as a great contribution to the theory and practice of diplomacy and foreign policy moving forward.

In today's era of increasing nationalism, uncertainty, and transnational challanges, I am of the view that soft power is now more important than ever.

Indeed, soft power reinforces and enhances constructive cooperation and partnership, both bilaterally and multilaterally.

When Harvard professor Joseph Nye coined the term soft power in the late 1980s, he defined it as "the ability to shape the preferences of others through appeal and attraction… the currency of soft power is culture, political values, and foreign policies."

This is fundamentally different from hard power, which is defined by attempts to coerce others through military and/or political and economic means.

This could entail the coercive power of the "stick" in the form of military threats or economic sanctions; or the coercive power of the "carrot" in the form of military protection or even favorable trade deals.

My country, Korea, is currently enjoying considerable soft power on the global stage. While our military and political hard power may not project immense strength in comparison to other global powers; Korean soft power assets, however, are incredibly well-known and increasingly popular around the world.

As you well know, soft power, on the other hand, is diametrically different as it does not center on coercion. Rather, it is recognized by the ability to attract the preferences of others via non-coercive, constructive means.

In today's increasingly interconnected and globalized world, soft power is everywhere, and is primarily manifested by cultural flows and people-to-people exchange.

This can occur through the arts, including music, film, TV, literature, and dance, as well as through sports and even food. It can also occur through travel and tourism.

And today migration and technology can disseminate cultural output faster, and in more organic ways through people-to-people exchanges, than ever before.

My country, Korea, is currently enjoying considerable soft power on the global stage. While our military and political hard power may not project immense strength in comparison to other global powers; Korean soft power assets, however, are incredibly well-known and increasingly popular around the world.

This includes K-Pop music such as BTS, Korean food like kimchi and bibimbap, Korean cinema such as the Oscar-winning Best Picture film "Parasite," Korean sport including footballer Son Heung-min and figure skater Yuna Kim, as well as K-Beauty products and technology.

This Hallyu, or Korean Wave, has captivated foreign publics the world over.

As a result, other nations are now attempting to replicate our success as a middle-power country with super-power cultural cache. Consider BTS, for example, which may be the most popular and famous band in the entire world today.

BTS sells out stadiums around the globe, has boosted the popularity of Korean language studies in faraway countries such as Mexico and Nigeria, and has even led to an entirely new generation of fans wanting to travel to Korea to explore Korean culture on a deeper level.

It is incredible for me to see tens of millions of fans who love BTS, and, by proxy, Korea, for their innovative artistic abilities in music and dance.

This represents a true sea change from foreign populations viewing Korea primarily through the prism of the North Korean nuclear issue or conflict and division.

I firmly believe that soft power is an important and particularly cost-effective



tool for forging guiding values and constructing peaceful, inclusive, and resilient societies.

Soft power transcends borders, builds bridges, and brings the world together through dialogue and mutual understanding.

Today, as we witness more and more self-inflicted isolation, trade barriers, and hardened borders, an embrace of multilateralism itself can also project considerable amounts of soft power on the global stage.

As Secretary-General of the United Nations, I led the Organization with the understanding that soft power is an essential ingredient in international diplomacy.

As Secretary-General of the United Nations, I led the Organization with the understanding that soft power is an essential ingredient in international diplomacy.

Additionally, soft power can help further the peace and development goals of the United Nations, particularly the UN SDGs, and reinforce global progress.

In fact, the three pillars of the UN—peace and security, development, and human rights—are all in line with the same objectives of soft power, and can help bring nations and peoples together through cooperation and partnership.

The 2030 Agenda and its Sustainable Development Goals is one of the UN's most significant achievements, and also one of my proudest personal achievements as it provides humanity, and our planet, with a collaborative blueprint to ensure the future we want.

Adopted by 193 countries in New York in 2015, the SDGs offer us a way forward to confront the most critical issues of our time including poverty, education, inequality, climate change, health, and gender equality.

National ownership is a prerequisite to achieve the SDGs, so governments around the world must continue mainstreaming the SGDs into key planning and policies.

This must be done at all levels, including the local and municipal levels, to give us the best chance of success and to instill a strong sense of collaboration and solidarity; both within and beyond cities and national borders.

But there are opportunities to enhance soft power through such SDG ownership for countries and cities as well. Consumers, tourists, and general publics are increasingly likely to view countries and cities more favorably if they are taking the lead on sustainability and climate action.

I take this opportunity to strongly urge all nations, cities, tourism boards, and other stakeholders to highlight the UN's SDGs and local sustainability efforts to achieve them. This is a win-win for soft power efforts and the UN.

There are other soft power opportunities for countries, and even cities, who embrace transformative approaches in the international arena such as global citizenship.

Global citizenship was borne out of the idea that to build peace, foster greater tolerance and understanding, and achieve sustainable development, we need inclusive and participatory action from all people everywhere.

This includes, especially, young people, as they are essential to solving so many of the world's most pressing challenges and establishing long-term solutions.



As such, I've been trying my best to help elevate global citizenship as a driving vision to help us forge a more peaceful and sustainable world. In this regard, two years ago I launched the Ban Ki-moon Centre for Global Citizens, based in Vienna, Austria to help provide young people and women with a greater say in their own destiny.

Solving the problems of our interconnected world, which are intrinsically global in nature, will continue to require robust cooperation and global solutions underpinned by transformational soft power initiatives and partnership.

Solving the problems of our interconnected world, which are intrinsically global in nature, will continue to require robust cooperation and global solutions underpinned by transformational soft power initiatives and partnership.

And in uncertain times as these, I believe that achieving the SDGs can unite all nations and people through cooperation and simultaneously bolster soft power gains.

I am confident that the insights shared here at Brand Finance's Global Soft Power Summit 2020 will be central to these unified efforts. We need to ensure that the UN's global goals are local business; in London and beyond.

In this regard, I respectfully call on all of you here today to play your part in continuing to center the UN's global goals in your ongoing work to leverage soft power.

You can help create the future we want, one where soft power, cultural exchange, and dynamic partnership helps steer humanity and our planet to new heights.

We all share a common destiny rooted in peace, sustainability, and prosperity.

Let's expand our unified efforts in to realize this shared destiny for all in the years to come.



David Haigh
Chairman and CEO,
Brand Finance Plc

Introduction

Global Soft Power Index – Looking at the stars

I come from the Baby Boomer generation which has lived through the transformation of Britain from one of the foremost exponents of hard power to one of the greatest proponents of soft power.

Less than a decade before I was born, Britain still had an Empire, representing approximately 20% of the earth's land mass and population. Britain had 850,000 personnel in our Armed Forces and spent 10% of GDP on enforcing control over that huge Empire. Back then, Inflation adjusted GDP per capita in the UK was only $10,000.

Today, we have the Commonwealth instead of the Empire, an entirely voluntary grouping with 53 member states. There are only 150,000 personnel in the Armed Forces and spend is only 2% of GDP on defence. Today, there are fewer members of the British Army than there are in the Police. Meanwhile, Inflation adjusted GDP per capita in the UK has risen to $45,000, a fourfold increase in real terms.

Britain is the sixth largest economy in the world and retains huge influence in many fields. Britain is proof that hard power isn't necessary in order to be an influential and wealthy nation. Some argue that our wealth and influence will decline post Brexit. I disagree, largely because of our strong Nation Brand and Soft Power quotient.

I suppose I am what you might call a modern, Elizabethan Brit… I would like to think I am pretty well educated, tolerant, pragmatic and globally engaged. Queen Elizabeth II has presided over the transformation of British society, a profound change in the kind of people Britain produces and the development of a fairer, more balanced view of the world and our role within it.

I and Brand Finance have definitely benefited from the widespread view that Britain is free and fair. A trustworthy place where you can believe in what we say and what we stand for. Nowadays, we Brits humbly offer our opinions and advice, we try not to impose them as we did in the past. That is what we at Brand Finance intend to do with our Global Soft Power initiative because we want to share our knowledge in this area with all nations around the world.

I set up Brand Finance in 1996 as a specialist provider of brand valuation, evaluation, research and consulting services. We are now in our 25th year, have offices in over 20 countries, and are recognised as the world's leading, independent, brand valuation firm. Having the City of London as our hometown and Britain as our country of origin have definitely helped us greatly, so you could say we are both a product and beneficiary of British soft power.

We have helped develop brand valuation, evaluation and reporting standards with the International Accounting Standards Board, the International Valuation Standards Council, the International Standards Organisation, the International Trademark Association and the Marketing Accountability Standards Board. We are regulated by the Institute of Chartered Accountants and, as such, we maintain the highest level of independence, integrity, transparency and honesty.

When we started, we focused primarily on commercial brands, but one feature of the last 25 years has been the transfer of brand management skills into all walks of life. Individuals, charities, universities, institutions and sports teams all now regard themselves as brands, and increasingly manage themselves as brands. David Beckham, Comic Relief, the University of Oxford, the Monarchy and Manchester United are all regarded as great and valuable British brands.

Some commercial British brands, like Shell, have larger GDPs than some countries, and nation brands are now learning marketing and branding techniques from them. Increasingly nations are managing their brands the same way large corporations do, looking at the world in a segmented way, by geography, industrial sector and customer demographics, using market research and sophisticated analysis to identify the best opportunities, both diplomatically and economically.

We got involved in this area in 2005 when we were asked to apply our brand valuation techniques to nation brands, and we have been doing so ever since. This will be the 16th year that we publish our ranking of the 100 strongest and most valuable nation brands. We now work for an increasing number of them, helping to enhance their brand attractiveness, both diplomatically and economically.

> We would like this annual Global Soft Power study to cover all 193 member countries of the United Nations

We assess these nation brands in a 3-stage process:

Firstly, we evaluate the Inputs. We break Inputs down into a range of internal and external governmental actions. Externally these include hard power activities, economic power activities and soft power activities. Hard power and economic power activity and status can be measured in absolutes.

Secondly, we analyse Brand Equity. Some nations, following the example of Britain in the 19th and 20th centuries, think functional achievements at home and exercising hard power and economic power abroad is sufficient. But, as Britain has demonstrated since the end of Empire, soft power can be at least as important, if not more so.

We define soft power as "a nation's ability to influence the preferences and behaviours of various actors in the international arena (States, Corporations, Communities, Publics etc) through attraction or persuasion rather than coercion". In other words, winning their hearts and minds. To understand the extent of soft power we need to research attitudes, perceptions and resulting behaviours.

Our Nation Brands study relies on publicly available data and financial modelling, and thus far is yet to include a proprietary market research element. We have long wanted to commission much more detailed and insightful market research among key stakeholders to inform our conclusions on the brand equity and soft power dimensions. The Global Soft Power Index does exactly this and is our contribution to this deeper understanding, as a service to nation brands.

Thirdly, we value the Outputs. We analyse the results in terms of tourism numbers, foreign direct investment volume and gross national product. We have found that the stronger a nation's Brand Equity and soft power performance are, the stronger its economic performance.

Putting all this together, results in an overall Nation Brand Strength Index and an absolute Nation Brand value in our annual study.

To arrive at the absolute Nation brand value, we use a valuation methodology called Royalty Relief, which is the most popular method for valuing commercial brands. It is based on the voluntary payments notionally made for the use of a commercial brand in a licensing context.

Interestingly, Royalties were originally the involuntary payments levied by Monarchs to finance their state activities, including their foreign wars. George III used them to finance his attempt to rule the American colonies. When he lost that little battle, he abolished involuntary royalty payments and gave up on taxation without representation. Perhaps if he had exercised soft power rather than hard power history might have been different and United States might now be a proud member of the Commonwealth.

To determine Nation Brand Strength and Value we use a variety of data sources including data from the International Monetary Fund (IMF), the International Institute for Management Development (IMD) and the World Economic Forum (WEF), among others.

The Global Soft Power research now allows us to use powerful, original stakeholder research to inform our annual assessments of nation brand strength.

We interviewed over 55,000 respondents based in more than 100 countries and asked their views on 60 nations around the world. It allows us to see in aggregate how the world sees a nation like Britain, but it also allows a more granular view of how each of the 100 nations views Britain. The overall headline results are of interest, but the more detailed information is of vital use for nations seeking to better manage their nation brands.

Brand Finance started as a one-man band and has grown by small but steady steps. Today we value over 5,000 commercial brands in 40 countries and 40 industrial sectors. Brandirectory.com, where our commercial brand valuation data can be found, is the most comprehensive database of commercial brand values in the world. Many of these brands are not yet our clients, but we have invested in them ahead of demand. As a result, year by year, more and more commercial brands are turning to our database for insight. We provide low cost entry to help smaller brands in developing markets understand their brand strength and value. We want our study to become a ubiquitous, syndicated data source for commercial brands and our low-cost, entry level approach is our contribution to get the ball rolling.

In the nation brand arena, we have also invested ahead of demand. Many nations have only recently created nation brand management teams and nation brand campaigns. They are now able to refer to work we have been doing consistently for 15 years. This soft power report will now

David Haigh | **Introduction**



allow them to draw upon our ground-breaking attitudinal research, the most inclusive of its kind.

As part of our launch initiative we are making the research data available free of charge to nation brands wishing to enhance their policy making and to academic researchers wishing to formulate ideas in this area.

Many of our Commercial clients already have the benefit of extensive brand equity research, revealing attitudes towards their brands in up to 100 nations world wide, to better manage their corporate and brand strategy.

Some Nation brands like the UK already benefit from similar worldwide brand equity research. The GREAT Campaign, here in the UK, has such insight and is able to measure at individual country level to finesse its communication messaging.

Now we have our Global Soft Power research to share we hope smaller nations will use it to better understand perceptions of their brands to redirect their strategies.

> Our Global Soft Power research study is the largest and most comprehensive public study of attitudes towards, and perceptions of, individual nation brands.

It is fitting that we have the 8th Secretary-General of the United Nations, His Excellency Ban Ki-moon with us to speak today as we launch our Global Soft Power Index.

It is our intention to commission annual waves of the research, and we want as many nation brands as possible to collaborate with Brand Finance in this initiative. We would like to extend the research to cover all 193 Nations in the UN.

The Brand Finance Institute will also be developing a programme of best practice in Global Soft Power together with academic and nation brand partners.

All nations aspire to improve their historical reputations. We hope our Global Soft Power research initiative will help them do so.

To paraphrase an old saying we all have our feet on the ground, but some of us are looking at the stars.



Dr Paul Temporal
Associate Fellow,
Saïd Business School,
University of Oxford

Foreword

Diplomats, politicians and leaders across all sectors frequently refer to 'Soft Power' and its economic and diplomatic advantages. Yet despite its widely-recognised benefits there has been a distinct absence of specific information on what soft power actually is, how it is derived and developed and how it can be more accurately measured. This is surprising given its huge significance to national success.

The Global Soft Power Index 2020 provides us with informed detail about how soft power is built and what activities are vital to its development. In addition this ground-breaking study provides the world's most up-to-date and comprehensive ranking of nations on global soft power and influence.

Soft power is based largely on Familiarity, Reputation and Influence which in turn are driven by a wide range of factors including: Business & Trade; Governance; International Relations; Culture & Heritage; Media & Communication; Education & Science; People & Values.

The Global Soft Power Index 2020 gathers data from these sources and addresses the perceptions of both the general public and specialist audiences, interviewing more than 55,000 people based in more than 100 nations. The scale and depth of the findings are very significant and a contribution to knowledge.

As the Index is based on a study of perceptions, it is, of course, a snapshot and dynamic in nature. But perception is reality and the report provides a useful tool for competitive analysis and policy enhancement. The study's extensive and well-presented data will be a valuable resource for governments as well as public and private sector institutions in developing economic and social policies.

It is in this context that the intangible value of soft power can impact significantly on a nation's brand. There is a definite link between the drivers of both soft power and nation branding and soft power can undoubtedly shape a nation's identity, image, attractiveness, influence and value. More specifically, soft power can help bring many financial and other benefits to nations including:

- Currency stability
- Attraction of global capital
- Greater international political influence
- Increase in the growth of branded, exported products and services
- Development of stronger international partnerships
- Enhancement of nation building (confidence, pride, harmony, ambition, national resolve)
- Attraction and retention of talent – entrepreneurs, sector specific human resource and global knowledge
- Greater access to, and share of, global markets
- Improvements in the ability to defend and promote domestic markets
- Improvements to the quality of life and shared prosperity for all citizens

Such benefits, and more, contribute to overall economic power and wealth and I am sure that the Global Soft Power Index 2020 will be a resource of great assistance to policy makers and practitioners who have national and international responsibilities.



01
Methodology

How did we survey perceptions of soft power?

- Defining soft power
- Consulting the experts
- The 7 Soft Power Pillars
- Constructing the Index
- Two separate surveys: General Public & Specialist Audiences
- Conducting 55,000 interviews across over 100 nations



Definitions of Soft Power

What is soft power?

World leaders, global corporate brands, civil society, entrepreneurs, academics, journalists and thinkers are endlessly attempting to make sense of the concept of power. Is it a dominant force exerted upon smaller entities? Is it the art of coaxing another around to your way of thinking?

When we look at nations around the world and their leadership through the lens of power, there are a variety of terms that can be applied to government policies and overall national influence: hard power, soft power, sticky power, old power, and new power.

The concept of soft power was first introduced by Joseph Nye in 1990 who argued that there is an alternative method of foreign policy for states to win the support of others; rather than the traditional hard power method, which involves using military and economic means as the primary method of achieving its goals.

Power is, not simply the "the ability or right to control people or things" but crucially it is also the possession of influence over others and the "ability to act or produce an effect". Ultimately, soft power is the ability to convert states rather than coerce them, or simply "getting others to want what you want", which is achieved by proving your shared values and norms.

This emphasis may have been relevant in the past, when states were reliant on taxable revenue and large armies were necessary to win wars – both of which are dependent on the size of the state's population. This is no longer the case, as "the definition of power is losing its emphasis on military force" and "technology, education and economic growth are becoming more significant in international power".

The strength of a nation in bringing others on-side can be said to rest broadly upon its culture, economy, political values, foreign policies, quality of life, robust academic institutions, and



Expert consultation

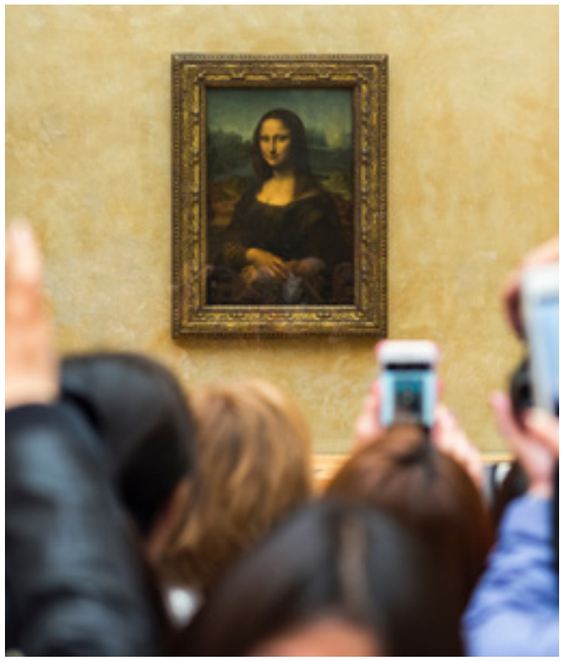
We started with a deep dive review of existing soft power surveys, indices, and frameworks, followed by a series of expert consultation interviews with soft power practitioners. We conducted 40 qualitative interviews across 18 countries and 9 categories: Academics; Corporates; Diplomats & Politicians; Lawyers; Journalists; Nation Brand Consultants & Managers; Entrepreneurs; Artists & Sportspeople; and Think-Tank Analysts. The purpose of the expert consultation and perception audit was to establish how soft power is viewed by its key stakeholders. The interviews were carried out by Brand Finance on the phone or in person during July and August 2019.

Following this soft power deep dive, we were able to build our own definition of soft power, carve out our 7 Soft Power Pillars and then form the building blocks of soft power and our ultimate Index structure.

rule of law. By proving the development of a nation's domestic strength, it is able to further its influence and legitimise its role as an international player. Socialising accepted norms and values is also a large part of a nation's effort to build its soft power reserve – a bank of influence created to affect the foreign policy of other states. This is because states, like humans, are more likely to trust those with whom they share common ideals.

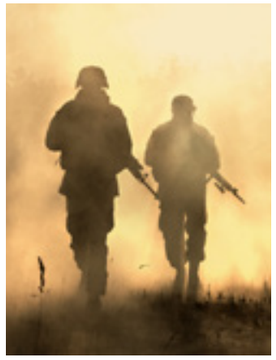
It is with this in mind that we have carved our in-house definition of soft power:

A nation's ability to influence the preferences and behaviours of various actors in the international arena (states, corporations, communities, publics etc.) through attraction or persuasion rather than coercion.



Definitions, definitions

The concept of soft power has undergone a critical analysis by a wide range of academics, journalists, think tanks, politicians, diplomats, and consultancies. By virtue of that, there are differing definitions of soft power and it is easy to fall into the trap of comparing apples with oranges. We started our analysis by clearly defining and conceptualising soft power to avoid any confusion and to ensure relevance of our study to a range of stakeholders.



Hard or soft power?

As part of our analysis, we conceptualised hard power alongside soft power. It is impossible to talk about one without touching on the other. Although building up hard power capabilities is inevitable, nations should pay more attention to soft power and make it their preferred tool of foreign policy.

Soft power rests on several pillars

Soft power is derived and exercised in a variety of ways. We have divided the building blocks of soft power into 7 key pillars: Business & Trade, Governance, International Relations, Culture & Heritage, Media & Communication, Education & Science, and People & Values.



Country? Nation? State?

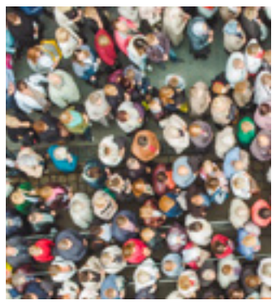
Part of the confusion comes from using different terms for the actors that exercise soft power on the international stage. We have decided to refer to ‘nations’ rather than ‘countries’ (geographical term) or ‘states’ (political term). ‘Nation’ encompasses both the government and the population of a country.

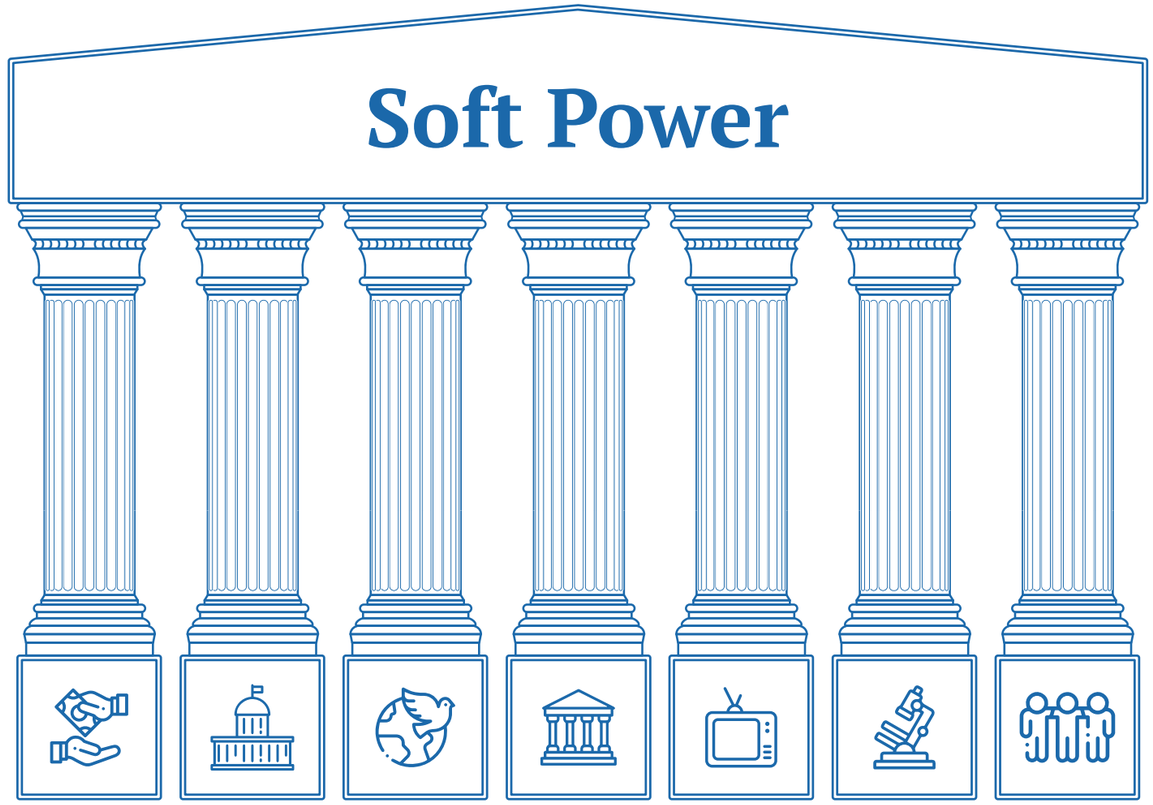
The times they are a-changin’

Most research on soft power has centred on the developed nations and almost equated soft power with the liberal values. Such understanding of soft power leads to a very narrow account of what constitutes ‘attraction’, especially in times marked by change. With our study being driven by an analysis of soft power influence of a broad range of nations, and conducting the survey on both General Public and Specialist Audiences samples in all corners of the world, we aimed to account for cultural differences and differing views.

Perceptions of soft power

In measuring soft power, we surveyed the sentiment of general publics and specialist audiences to gauge what key stakeholders thought about the soft power potential of nations in the sample.





Business & Trade

ECONOMY
BUSINESS
BRANDS
TAXATION
TRADE
INVESTMENT
INFRASTRUCTURE

Governance

RULE OF LAW
HUMAN RIGHTS
CRIME RATE
SECURITY
CONSTITUTION
POLITICAL ELITE

International Relations

DIPLOMATIC RELATIONS
INTERNATIONAL ORGANISATIONS
CONFLICT RESOLUTION
INTERNATIONAL AID
CLIMATE ACTION

Culture & Heritage

TOURISM
SPORT
FOOD
FINE ARTS
LITERATURE
MUSIC
FILM
GAMING
FASHION

Media & Communication

TRADITIONAL MEDIA
SOCIAL MEDIA
MARKETING

Education & Science

HIGHER EDUCATION
SCIENCE
TECHNOLOGIES

People & Values

VALUES
CHARACTER
TRUST



Methodology

How the Index is constructed

The Global Soft Power Index is based on the most comprehensive and wide-ranging research programme of its kind, with responses gathered from over 55,000 people based in more than 100 countries, surveying perceptions of soft power of 60 nations from around the world.

In autumn 2019, two surveys were conducted, both global in scope:

General Public – a survey of public opinion covering 54,206 residents of 87 countries representing all continents and regions of the world

Specialist Audiences – the views of 1,021 experts from 71 countries and territories – including several not covered by the general public sample – representing categories identified as likely targets and conduits for soft power: business leaders, market analysts, politicians, academics, think-tanks and NGOs, and journalists.

The Global Soft Power Index incorporates a broad range of measures, which in combination provide a balanced and holistic assessment of nations' presence, reputation, and impact on the world stage. These include:

- Awareness and Familiarity: nation brands which people know, and have mental availability of, have greater soft power
- Overall Influence: the degree to which a nation is seen to have influence in the respondent's country as well as on the world's stage
- Overall Reputation: is this nation deemed to have a strong and positive reputation globally?
- Performance on the 7 Soft Power Pillars (Business & Trade, Governance, International Relations, Culture & Heritage, Media & Communication, Education & Science, People & Values)

The weightings given to each measure within the Index were based on a combination of expert opinion, coming from an extensive literature review and expert consultation process, and statistical analysis assessing the degree to which pillar performance correlates with Overall Influence.

The Index gives a 75% weighting to the views of the General Public and 25% to those of Specialist Audiences.

Methodology – *General Public*

An online survey was conducted among 54,206 adults aged 18-75, across 87 countries. As such, our sample is representative of the online population of each country. In developing markets with relatively low internet access (below 85% across all age groups), this skews the sample somewhat towards people with higher education, income, and connectivity – but we deem this acceptable, as it is these groups in the population who are most likely to be affected by soft power and have some familiarity with other nations.



Fieldwork Method

Two fieldwork approaches were employed. Both have been shown to provide good representations of public opinion.

In more developed markets, established online research panels were used. Panel selection and management was conducted by Savanta.

Where online panel coverage is weak, we partnered with Qriously adopting a relatively new and cutting-edge approach based on buying advertising space via digital exchanges. Such an approach can be applied even to very challenging markets like Iraq and Venezuela.

Quotas were applied by age, gender, and (in panel markets) region – in line with the online population profiles of each country.

Regional and global total scores were calculated by combining country results using the following weights:

50% – the 'one country one vote' rule, accounting for the sovereignty and differences between the multitude of nations around the world

50% – the size of the online population aged 18-75, with the opinions of the residents of large countries, e.g. China receiving a much greater weight than those of smaller countries, e.g. Estonia

Questionnaire

Each respondent was shown a random sub-set of nation brands and asked about their familiarity. For nations about which the respondent had some knowledge, a detailed assessment of reputation, influence, and performance on 30 characteristics representing the 7 Soft Power Pillars was obtained.

Across each country sample, the 60 nation brands were rotated to ensure that all nations were assessed globally. Surveys were conducted in the major languages of each country, totalling 42 languages globally.

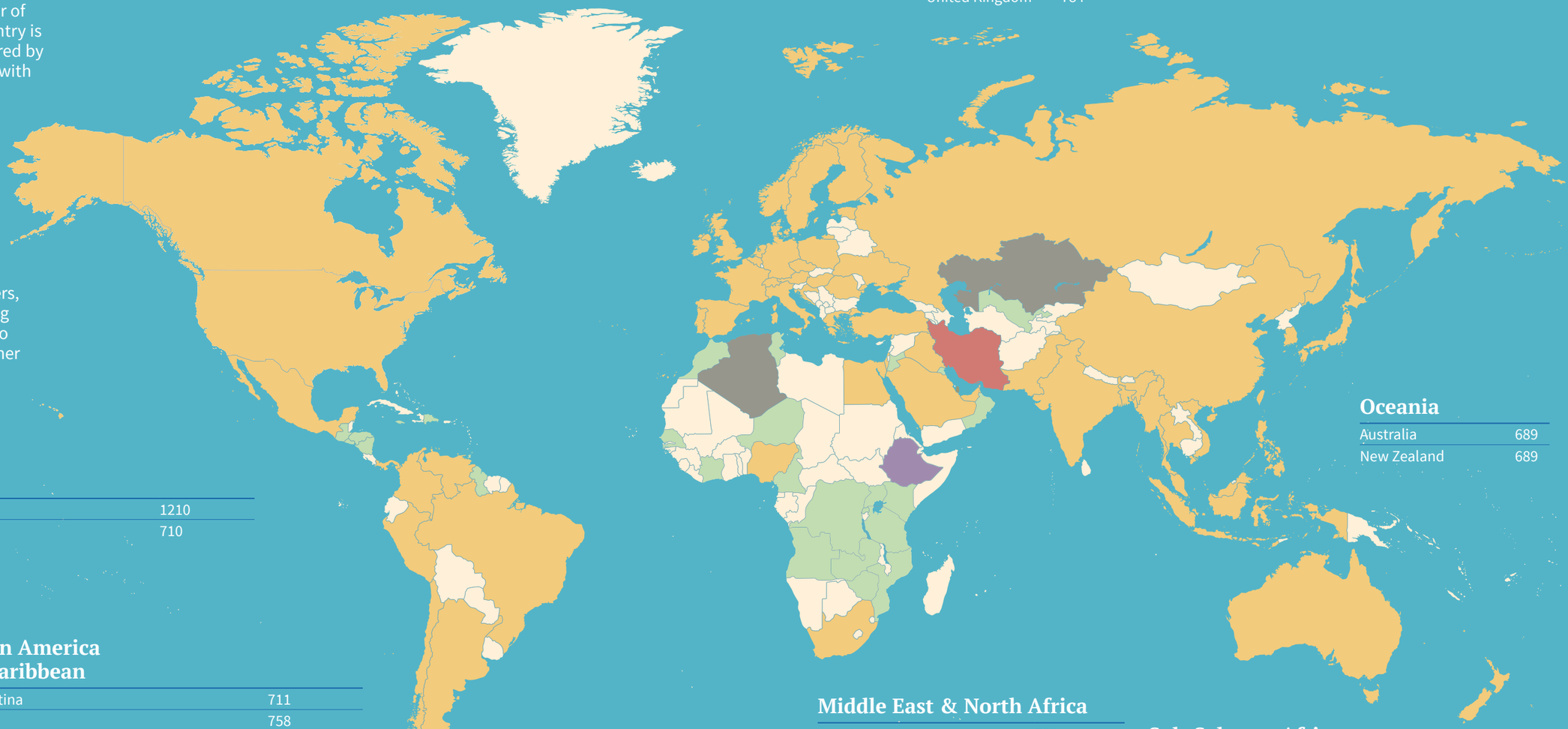
General Public
Sample Size by Country

A total of 54,206 interviews across the 87 countries were conducted as part of the General Public survey. The number of interviews conducted in each country is shown in the tables. Markets covered by ad exchange samples are marked with an asterisk (*).

Note that responses from some of the countries with smaller online populations were grouped into regional samples, with analysis effectively conducted at the joint sample level rather than the individual country level.

A challenging market for researchers, Iran is the only country from among the 60 ranked in the Index where no fieldwork on the perceptions of other nation brands was conducted.

● *Rated* | Own Sample ● *Rated* | Joint Sample ● *Rated* | No Sample
● *Not Rated* | Own Sample ● *Not Rated* | Joint Sample ● *Not Rated* | No Sample



Europe

Austria	696
Belgium	700
Croatia	730
Czech Republic	709
Denmark	695
Estonia	705
Finland	721
France	717
Germany	682
Greece	697
Hungary	706
Ireland	706
Italy	704
Netherlands	687
Norway	695
Poland	699
Portugal	706
Romania	724
Russia	729
Spain	710
Sweden	709
Switzerland	693
Turkey	708
Ukraine	715
United Kingdom	784

Asia

*Bangladesh	1124
China	1233
India	1241
Indonesia	1178
Japan	729
*Kazakhstan & Uzbekistan	1137
Malaysia	697
*Myanmar	1108
*Pakistan	1171
Philippines	703
Singapore	715
South Korea	690
Thailand	696
Vietnam	702

North America

United States	1210
Canada	710

Latin America & Caribbean

Argentina	711
Brazil	758
***Caribbean** (Guyana, Jamaica, Trinidad & Tobago)	941
Chile	747
Colombia	732
Mexico	713
***Central America** (Domincan Rep., El Salvador, Guatemala, Honduras, Nicaragua)	1007
Peru	725
*Venezuela	835

Middle East & North Africa

Egypt	702
Iran	-
*Iraq	1194
*Israel	824
***Maghreb** (Algeria, Morocco, Tunisia)	1188
***Middle East** (Jordan, Kuwait, Oman, Qatar)	1246
Saudi Arabia	1019
United Arab Emirates	998

Oceania

Australia	689
New Zealand	689

Sub-Saharan Africa

***East Africa** (Kenya, Tanzania, Uganda)	1117
*Ethiopia	546
***Central & West Africa** (Cameroon, Cote d'Ivoire, DRC, Niger, Rwanda, Senegal)	1265
*Nigeria	1166
South Africa	709
***Southern Africa** (Angola, Mozambique, Zambia, Zimbabwe)	914

Methodology – *Specialist Audiences*

The Specialist Audiences survey covered specialists across a range of categories selected through the process of expert consultation and literature review. The sample frame was then developed by Brand Finance and our fieldwork partner RONIN, using existing public and internal databases, as well as additional desk research. Our sample comprised a total of 1,021 interviews across 71 countries and territories, representing specialist audiences from the worlds of business, market analysis, politics, academia, think-tanks and NGOs, and media.





Fieldwork method

Respondents were initially contacted by telephone and invited to take part in the survey. The main interview was conducted online or by telephone, as the respondent preferred.

Questionnaire

As with the General Public survey, each respondent was asked about a random sub-set of nation brands and about their familiarity. For nations about which the respondent had some knowledge, detailed assessment of reputation, influence, and performance on the 7 Soft Power Pillars was obtained. Surveys were conducted in the major languages of each country or in English for some internationally focused respondents regardless of their location.

Please contact Brand Finance at ***softpower@brandfinance.com*** *if you would like more details on our technical calculations.*

Specialist Audiences

Breakdown by Geography and Sector



Business
307

Owners & senior managers of medium- and large-sized businesses

Analysts
55

Market analysts

Politics
154

Local & central government officials and members of legislatures

Academia
132

Faculty members at leading universities, across subjects relevant to soft power

Think-tanks & NGOs
107

Senior managers at think-tanks, NGOs, and charities

Media
266

Editors & journalists in national and regional media



02 Executive Summary

What are the top 10 soft power nations?

- United States' global influence makes it the world's soft power superpower
- Germany admired for its respected leadership
- UK upholds favourable reputation, despite Brexit uncertainty
- Japan ranks first for Business & Trade
- China's soft power expansion pays off
- France claims 6th spot globally and 3rd in Europe
- Canada seen as world's most generous nation
- Switzerland is the world's most reputable nation
- Greta Thunberg generates remarkable soft power for Sweden
- Russia performs solidly in 10th position



Executive Summary

The only soft power superpower

Recent tensions in the United States' domestic politics and unilateralism in international relations have dented the nation's reputation but have not managed to crush its global influence. With the highest Soft Power Index score of 67.1 and distancing the runner-up – Germany – by more than 5 points, the US is found to be the world's most influential nation in terms of soft power, and arguably the only soft power superpower, winning on more characteristics than any other nation in the study and therefore topping our survey medal table with eight golds (see p. 42).

The mixed international reception of controversies surrounding President Trump's administration is likely to be the reason behind relatively low ratings for Reputation (13th) and Governance (16th), with the US scoring particularly low with specialist audiences. Similarly, the general public marked the US down for ethical standards (13th), political stability (19th), and safety (21st), while also acknowledging its deteriorated international standing following the introduction of the 'America First' doctrine by rating it 44th for relations with other countries. The general public also ranked the US low for climate action (28th) as well as trustworthiness (23rd) in the People & Values pillar. This is perhaps understandable given America's decisions to unilaterally pull out of the Paris Agreement on climate change and the Joint Comprehensive Plan of Action on Iranian nuclear policy, undermining the nation's reliability as a partner on the world stage.

> Soft power cannot be rapidly achieved, nor lost. The United States has shown that ultimately, despite the reputational challenges of impeachment and unpredictable foreign policy, its position as the rule-maker in the international system and the world's only soft power superpower is unrivalled, and it will remain so as long as its economy, media, culture, and science reign supreme.

However, a comprehensive assessment demonstrates that a nation's soft power is clearly more than simply the perceptions of its government's policies. The US has posted top scores for Familiarity and Influence among all nations in the ranking, balancing the shortcomings on Reputation. The nation also came first on Media & Communication and Education & Science pillars, a nod to America's omnipresence in the news and its undisputed lead in technological development. The unwavering economic and socio-cultural pull of the United States is in turn demonstrated in high ratings from the general public on arts & entertainment (1st), sports (1st), brands & products (2nd), and lifestyle (6th).

The West...

With an overall score of 61.9 and wielding the most soft power in Europe, Germany marginally beats the United Kingdom (61.8) to second place in the Index. Going against the legacy of the past, Germany focuses much more on its soft rather than hard power. Since the end of World War II, and even more so after the fall of the Berlin Wall, Germany eschewed the use of hard power in its domestic and international affairs, with military deployments tightly restricted, and most Germans regarding their own army with suspicion.

A testament to its deliberate focus on soft power, Germany ranks in the top 3 for five out of the 7 Soft Power Pillars, boosted especially by high ratings from the general public. Most notably, Germany is considered number one for a strong and stable economy, augmenting its score in the Business & Trade pillar. The nation's economic situation is matched by high scores on its political standing within the Governance pillar, with the general public recognising Germany as superbly well-governed and equally admired for the reputation of its leaders, owing to Angela Merkel's long tenure as Chancellor. Against the backdrop of unstable and

Global Soft Power Index Top 10

1	United States	8.6	*Familiarity*	67.1
		7.7	*Influence*	
		7.1	*Reputation*	
2	Germany	7.9	*Familiarity*	61.9
		6.0	*Influence*	
		7.4	*Reputation*	
3	United Kingdom	8.2	*Familiarity*	61.8
		6.3	*Influence*	
		7.3	*Reputation*	
4	Japan	7.6	*Familiarity*	60.2
		5.8	*Influence*	
		7.5	*Reputation*	
5	China	7.6	*Familiarity*	58.7
		7.1	*Influence*	
		6.5	*Reputation*	
6	France	8.1	*Familiarity*	58.5
		5.8	*Influence*	
		7.1	*Reputation*	
7	Canada	7.4	*Familiarity*	54.5
		5.0	*Influence*	
		7.5	*Reputation*	
8	Switzerland	6.9	*Familiarity*	54.5
		4.7	*Influence*	
		7.6	*Reputation*	
9	Sweden	6.4	*Familiarity*	51.9
		4.2	*Influence*	
		7.4	*Reputation*	
10	Russia	7.2	*Familiarity*	51.0
		5.7	*Influence*	
		6.3	*Reputation*	

As a peaceful nation with a strong economy and an extensive portfolio of high-performing brands across the automotive, construction, and technology sectors, soft power is a natural way for Germany to project influence. Coupled with the nation's reliable leadership during a time of increasing polarisation in Europe, Germany is poised to remain a well-respected beacon of stability and economic growth both on the continent and on the global stage.



Despite ongoing uncertainty following the Brexit referendum and subsequent withdrawal from the European Union, the United Kingdom ranks 3rd overall, with a Global Soft Power Index score of 61.8. proving that the UK has transformed a sense of universal Familiarity and favourable Reputation into Influence on the global stage.



Performing consistently across nearly all metrics in the Global Soft Power Index, the UK claims a top 5 position for International Relations, Culture & Heritage, Media & Communication, and Education & Science. An unrivalled contributor to the UK's soft power is the Royal family, which Brand Finance estimates to contribute US$2.4 billion to the economy every year, with the Queen also holding political and cultural value abroad as the figurehead in driving and upholding the values of the Commonwealth. Cementing this strong performance is also the UK's booming film and music industry, with British popular culture being widely circulated and enjoyed by millions of people around the world.

Across the channel, France (58.5) narrowly misses out on ranking in the top 5, claiming 6th spot globally and 3rd position in Europe. Particularly burdened by its performance in the Governance pillar, where it ranks 15th, France's global reputation has been dented by recent political unrest, characterised by the yellow vests protests, low approval ratings for President Macron, and the far-right gaining traction.

The nation's strongest pillar is Culture & Heritage, where it received top marks from specialist audiences and high scores across key characteristics from the general public, boosted by appreciation for French 'art de vivre' manifested in world-renowned art, luxury products, and fine cuisine. Despite better economic prospects, thanks to ongoing reforms and lower unemployment, France ranks only 8th in Business & Trade, and as the nation is not perceived as particularly innovative, it also lags behind on Education & Science, coming 14th globally.

...and the East

In Asia, the highest-ranking nation is Japan (60.2), claiming 4th spot globally and ranking consistently in the top 10 on all key metrics. Despite an economic slowdown, Japan has reaped the benefits of its strong brands, solid consumer spend, and high levels of business investment, ranking first in the Business & Trade pillar. As the 3rd largest global economy, Japan is a forward-thinking and outward-looking nation with the second-highest spend worldwide on research and development, reflected in its 2nd spot on the Education & Science pillar.

One of the top trading economies for volume of goods and services, South Korea (14th – 48.3) is scoring similarly high on both Business & Trade and Education & Science. Boasting an impressive portfolio of high-performing tech brands such as Samsung, Hyundai, and LG, South Korea continues to pave the way for innovation, working alongside its Japanese neighbour to pivot soft power further to the east.

Influence vs Reputation

Two, perhaps unexpected, nations in the top 10 are China (58.7) and Russia (51.0), claiming 5th and 10th position in the Index respectively. Their high rankings have disturbed the Western, liberal soft power status quo. However, both nations' Reputation rankings are considerably lower than their Influence ranking – for Influence, China sits in 2nd and Russia in 7th, whereas for Reputation, China falls to 24th and Russia to 26th. The failure to marry



up strong influence with positive reputation is what makes competing with the soft power elite difficult. Saudi Arabia (41.9) and Turkey (39.4) are in a similar predicament, also recording high positions in the Influence ranking compared to Reputation – claiming 10th and 18th spot for the former versus 40th and 46th for the latter.

Having the largest population in the world and the 2nd largest economy, China has boasted a meteoric rise on to the global stage since the 'opening up' policy in the late 1970s. Since then, the nation's economy has doubled in size every eight years to a position where its dominance is unavoidable, reflected in its 5th rating in the Business & Trade pillar, owed to its top position for perceived ease of doing business.



China has heavily invested in its soft power initiatives, predominantly through foreign direct investment and cultural expansion, particularly in Africa. A staggering US$100 billion of investment has been estimated to have been spent on the Belt & Road Initiative thus far, helping to boost Familiarity and Influence scores. But as spending and expansion increases, so do concerns surrounding the threat of Chinese economic hegemony, as smaller nations cede influence to China. These misconceptions around China's soft power offensive and the reluctance to trust some of the nation's key corporates have put the Chinese government in a challenging position.

China and Russia are the nexus of change for global political, economic, and social world order. Western democracies can no longer rely on the end-of-history assumption that liberal values have won globally and have to adapt to a world shared with these new colossal soft power players.

Russia, the world's largest country by land area, secures its highest position in the International Relations pillar (5th), reinforced by very strong scores for influence in diplomatic circles. The nation scores very high for the strength of its leadership. Vladimir Putin's Presidency and Prime Ministership have spanned two decades, and despite his style garnering much controversy, he has overseen the nation's return to the top league of world politics and remains a powerful figure among global leaders.

Ironically, Russia is ranked 4th for leaders in sports, despite the nation being banned from the 2020 Tokyo Olympics and the 2022 FIFA World Cup, following the doping scandal that stunned the sporting community.

Reputation vs Influence

Liberal Western nations, often associated with neutrality and peace-making efforts, rank well in the Index, particularly Canada (7th), Switzerland (8th), and Sweden (9th), featuring in the top 10. However, as in the case of China and Russia – high performance in one area



is not a good enough recipe for overall success in soft power.

The Nordic nations in particular have been boosted by their perception among the general public as climate-friendly, with Sweden ranking first globally for this metric. This is likely attributable to the efforts of Greta Thunberg who has become the voice of millions of young people demanding action to prevent irreversible changes to the environment. Sweden, Denmark, Norway, and Finland all rank in the top 10 for Reputation as well as for the Governance pillar, but lag behind on Influence. Trailblazers on specific issues, whether it be climate change, social welfare, or employees' rights, and garnering appreciation around the world for their relentless efforts, these nations often lack sufficient clout to influence other nations to follow their leadership. The Paris Agreement on climate change is an example of how the withdrawal of a single but influential nation, such as the US, can undo years of work by many smaller ones.

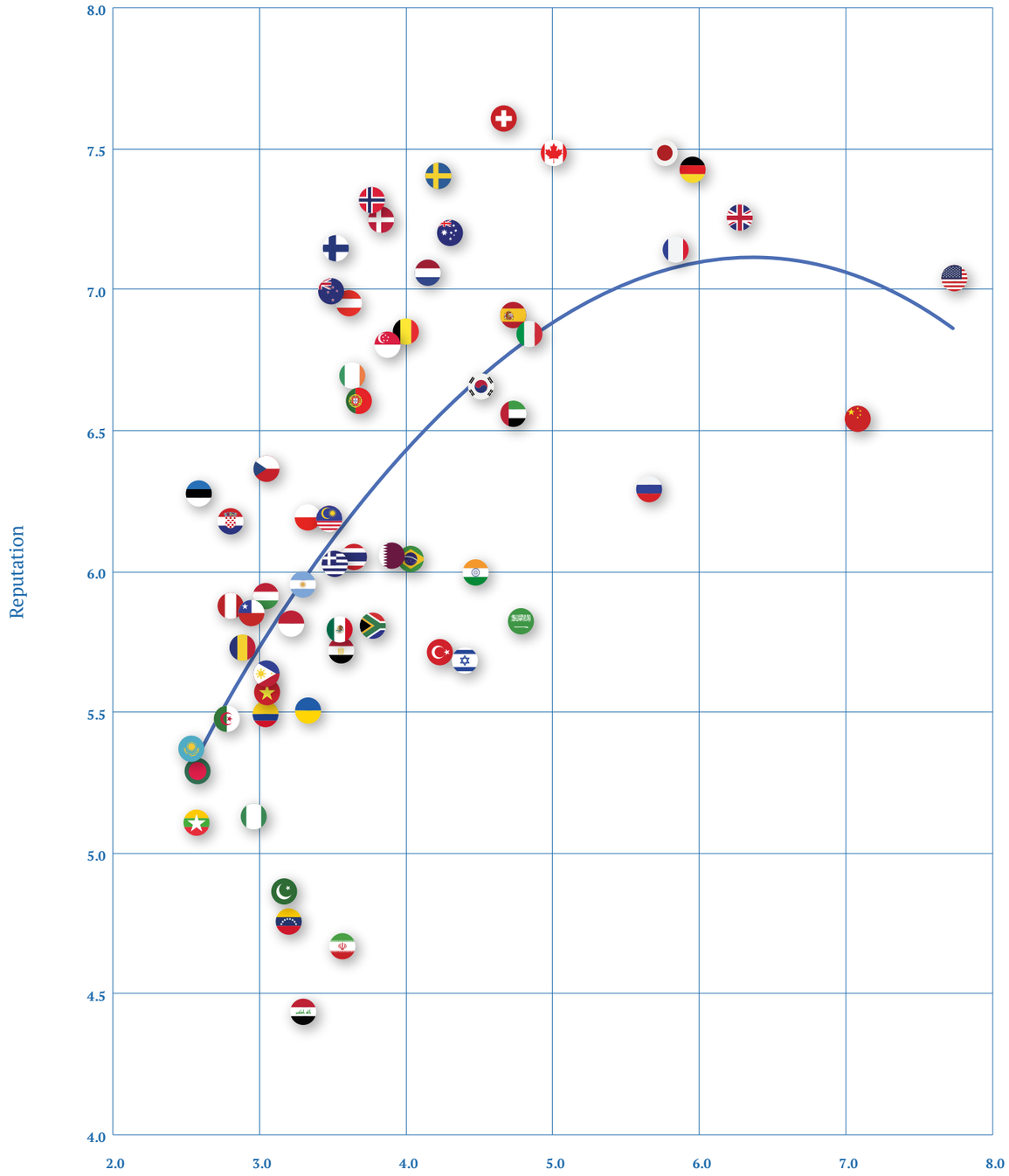
While clearly well respected, liberal nations' rankings demonstrate that reputation alone cannot generate soft power. Leading in particular areas, such as climate change and governance, they often lack resources to project influence in an increasingly multidimensional global system.

Switzerland ranks first in the world for Reputation, but constrained by its long-standing policy of diplomatic neutrality, is not perceived as a world leader in Influence, taking a relatively low 13th spot. It also ranks 1st for Governance and 3rd for Business & Trade, benefitting from being perceived as a stable and affluent country, appealing to both immigrants and tourists.

Another benevolent nation, Canada ranks highest globally for the People & Values pillar. The effects of a liberal asylum and migration policy on its soft power are clear – general public respondents rank Canada as the world's most generous nation, 2nd for friendliness, and 3rd for tolerance. Also its International Relations score benefits from its open policies, with the nation perceived as helpful to

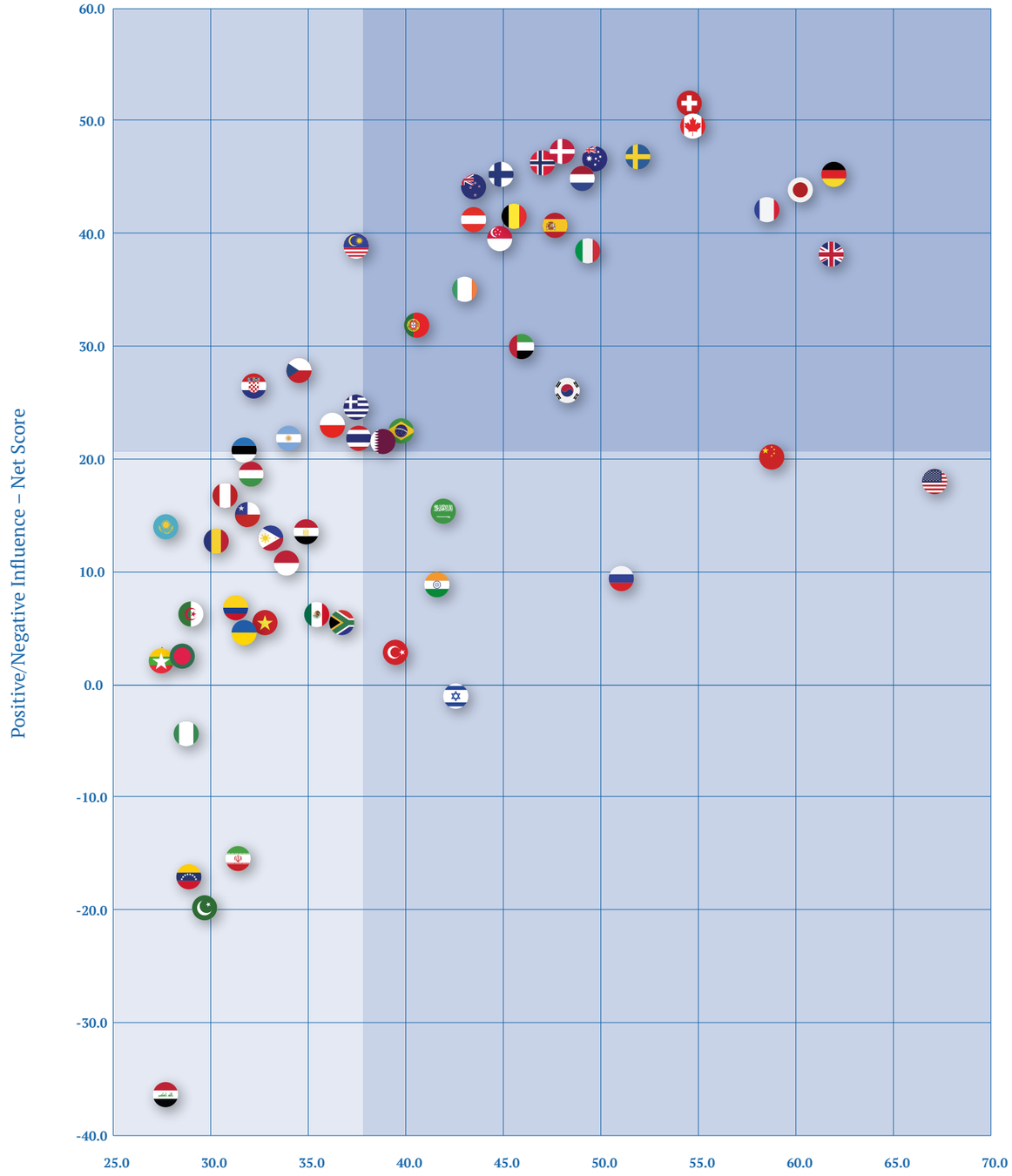
Reputation vs Influence

Soft power is more than a good reputation, but the two are correlated to a point. Above the trend line are nations boasting a high reputation, mainly from the West. Below the line are nations such as Russia and China, with undoubted influence despite a less-than-perfect reputation. Still, there is a clear gap between the reputations of Russia and China and nations such as Iraq and Iran at the bottom of the ranking.



Positive vs Negative Influence

Soft power is deployed more effectively if recipients view the likely motives or impact as positive. Countries such as Switzerland and Canada are seen as having positive impact, whereas opinions are more mixed regarding China and the US. But note that on balance these superpowers' impact is seen as more positive than negative, unlike countries such as Iraq or Venezuela.



countries in need (2nd), acting to protect the environment (2nd), and maintaining good relations with other countries (3rd). Despite coming in the top 3 for 13 characteristics and winning more medals than any other nation (see p. 42), Canada still wields less Influence than its much larger, southern neighbour, and ranks 7th with an overall Index score of 54.5.

The familiar destinations

A nation's familiarity is another key driver of soft power. Tourism in turn bears a crucial impact on a nation's familiarity, exemplified by holiday hotspots, Spain and Italy, placed firmly in the top 10 with respective Familiarity scores of 7.5/10 and 7.6/10. Attracting over 60 million tourists every year, Italy was ranked as the nation with the best cuisine and third for producing high-quality brands by the general public. Similar results were observed for Spain, which is considered the friendliest culture in the world with one of the best cuisines.



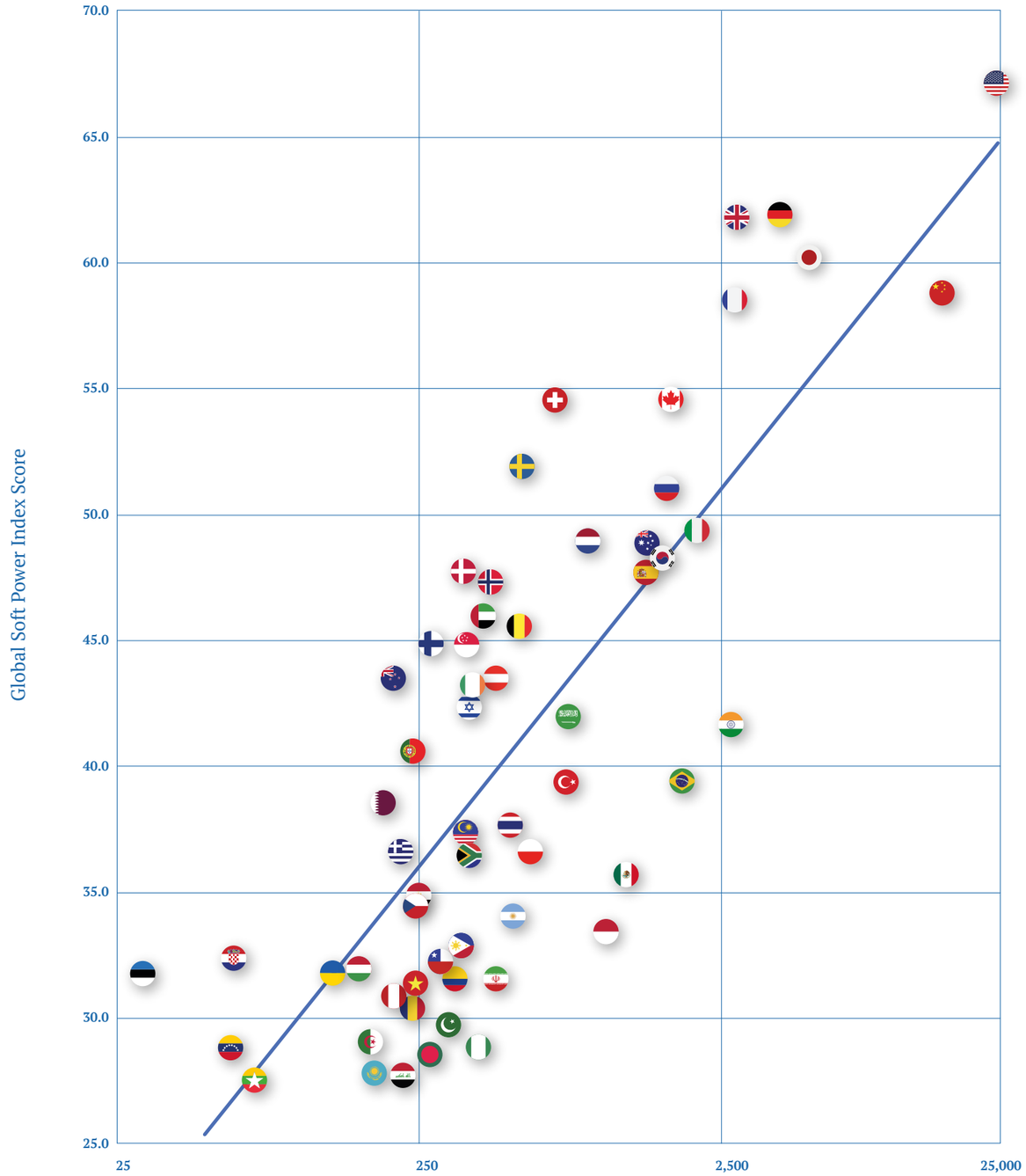


Other nations with high levels of tourism also performed well on Familiarity. This was the case throughout the Mediterranean, where tourists flock to the warm waters and ancient monuments, with Egypt and Greece considered by the general public to be the nations with the richest heritage. A similar trend was observed in Thailand, which – despite ranking 32nd in the Index with a score of 37.6/100 – outshines its ASEAN neighbours in 17th position on Familiarity with a corresponding score of 6.5/10. Thailand has benefitted considerably from a growing influx of tourism year on year, which currently accounts for 20% of its GDP. However, this is a double-edged sword, as some parts of Thailand are hindered by their fundamental lack of resources to handle the environmental burdens created by overtourism. Following the indefinite closure of Maya Bay – a beach that raked in about 2.5 million tourists per year – Thailand will need to work hard to cope with the increasing demands of visitors if it does not want to lose its soft power.

Soft Power vs Economic Power

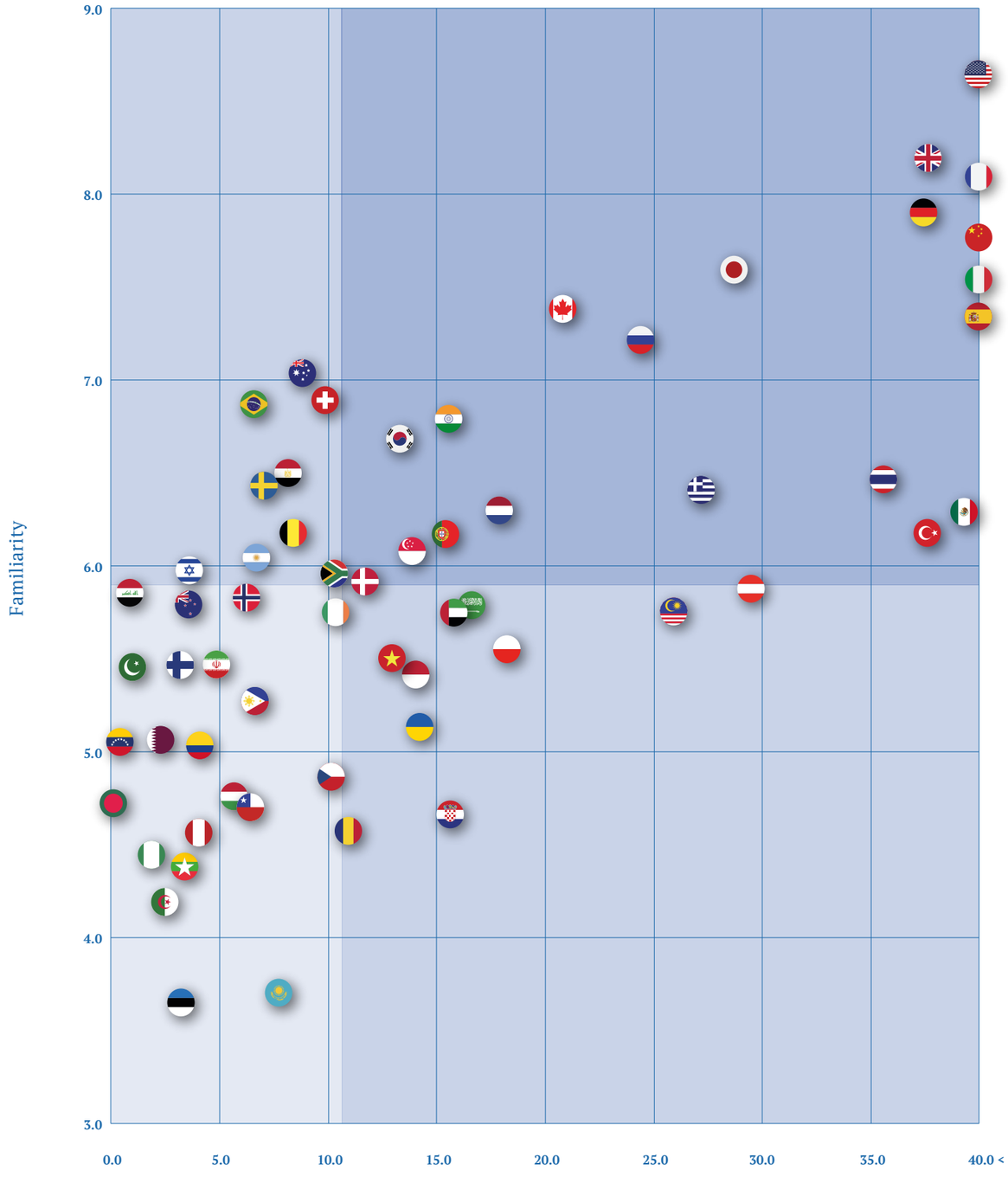
Countries above the trend line have high soft power given the size of their economies, whereas those below it are arguably not fulfilling their soft power potential.

Thus, Switzerland is a soft power overachiever, but India – a large economy and population – has relatively modest global influence.



Familiarity vs Tourism

Countries with high levels of tourism get a boost in terms of familiarity and perhaps broader understanding and appreciation. There are arguably long-term boosts to a nation's "mental availability" derived via tourism, beyond the direct economic impact.





Catching up

At the bottom end of the Index, but still ranking among the top 60 soft power nations globally, are Kazakhstan, Iraq, and Myanmar in 58th, 59th and 60th position respectively.

Iraq's (27.7/100) situation is well documented. Years of war and civil instability have left the cradle of civilisation with a significantly weakened international reputation. Iraq ranks 60th among general public respondents for safety and security, as well as for political stability. Thanks to its history, rich cultural heritage, and successful diaspora, Iraq will always have the potential to wield influence particularly within the Arab world. Nevertheless, the nation faces substantial obstacles on its path to re-establishing its soft power.

If Iraq has lost influence at the hands of others, Myanmar's (27.5/100) low ranking in the Index is contrastingly self-inflicted. The government's harsh persecution of the Rohingya people since 2015 has dented Myanmar's Reputation globally (56th). Any goodwill previously garnered by Aung San Suu Kyi, Myanmar's State Counsellor and Nobel Peace Prize winner, has now dissipated as she has attempted to justify her government's actions. Myanmar is currently defending itself against charges of alleged crimes against humanity at the International Criminal Court, and the nation has recently been added to an American list of nations facing stringent travel restrictions.

Kazakhstan (27.7/100) has not suffered from civil instability in the way that its neighbours at the bottom of the Index have. Instead, a distinctly low Familiarity (59th) leaves the nation with no platform to build its soft power. Struggling to set an effective narrative for its role on the world stage, Kazakhstan has somewhat faded into obscurity and is often blended with other central Asian nations, reducing its ability to shape its own image based on its culture and people.

Soft power is not easily lost, but decades of instability or war will inevitably drain any nation of its global influence. Though the stories of Kazakhstan, Iraq, and Myanmar are not homogenous, they represent the consequences of losing control of your nation's perceptions and, as a result, your nation's soft power.



Medal Table

As part of our analysis, we have ranked nations and tallied up the results to see who wins on each of the 30 measures investigated among the general public and each of the 7 pillars investigated among specialist audiences.

The results are in and the competition for soft power is hotter than any Olympics we have seen in recent times.

The USA is in pole position, as it tends to be in international competitions, but the runners-up are varied.

In fact, “a leader in sports” is one of the areas, where the US excels according to our study, winning top-spot and its first gold medal. Germany and Brazil take silver and bronze here respectively. It seems they have both benefited from their perennially strong performance in football with Germany toppling Brazil at the last minute on penalties.

The US also led the pack in measures covering media, science, arts and entertainment, and influence in diplomatic circles.

Switzerland’s performance is perhaps surprising for some but premium Swiss chocolate maker Lindt’s bright

Specialist Audiences

🇨🇭	🇸🇪	🇳🇱	*Business & Trade*
🇩🇰	🇨🇭	🇳🇴	*Governance*
🇺🇸	🇬🇧	🇨🇳	*International Relations*
🇫🇷	🇮🇹	🇬🇧	*Culture & Heritage*
🇳🇱	🇩🇪	🇫🇷	*Media & Communication*
🇺🇸	🇯🇵	🇬🇧	*Education & Science*
🇩🇰	🇦🇺	🇵🇹	*People & Values*

General Audiences

			Soft power characteristics
🇩🇪	🇨🇭	🇨🇦	*A strong and stable economy*
🇨🇳	🇸🇬	🇨🇦	*Easy to do business in and with*
🇯🇵	🇺🇸	🇮🇹	*Products and brands the world loves*
🇩🇪	🇸🇪	🇨🇭	*Politically stable & well-governed*
🇯🇵	🇺🇸	🇩🇪	*Respects law and human rights*
🇯🇵	🇨🇭	🇸🇪	*High ethical standards and low corruption*
🇨🇭	🇨🇦	🇯🇵	*Safe & secure*
🇩🇪	🇷🇺	🇺🇸	*Respected leaders*
🇺🇸	🇩🇪	🇷🇺	*Influential in diplomatic circles*
🇨🇭	🇸🇪	🇨🇦	*Good relations with other countries*
🇩🇪	🇨🇦	🇸🇪	*Helpful to other countries in need*
🇸🇪	🇨🇦	🇳🇴	*Acts to protect the environment*
🇪🇬	🇬🇷	🇨🇳	*Rich heritage*
🇦🇺	🇫🇷	🇨🇭	*A great place to visit*
🇨🇭	🇨🇦	🇸🇪	*An appealing lifestyle*
🇺🇸	🇫🇷	🇬🇧	*Influential in arts and entertainment*
🇮🇹	🇫🇷	🇲🇽	*Food the world loves*
🇺🇸	🇩🇪	🇧🇷	*Leaders in sports*
🇺🇸	🇬🇧	🇩🇪	*Influential media*
🇨🇦	🇨🇭	🇸🇪	*Trustworthy media*
🇺🇸	🇬🇧	🇯🇵	*Affairs I follow closely*
🇨🇦	🇬🇧	🇨🇭	*Good communicators*
🇸🇪	🇬🇧	🇨🇦	*Strong educational system*
🇺🇸	🇯🇵	🇩🇪	*A leader in science*
🇯🇵	🇺🇸	🇩🇪	*Leading-edge technology*
🇪🇸	🇨🇦	🇮🇹	*Friendly*
🇪🇸	🇮🇹	🇧🇷	*Fun*
🇨🇦	🇸🇪	🇯🇵	*Generous*
🇸🇪	🇫🇷	🇨🇦	*Tolerant*
🇸🇪	🇨🇭	🇩🇪	*Trustworthy*

Full Medal Table

					Total
1		8	3	1	12
2		4	5	3	12
3		4	4	4	12
4		4	3	5	12
5		4	2	3	9
6		3	5	5	13
7		2	0	0	2
8		2	0	0	2
9		1	4	1	6
10		1	2	2	5
11		1	0	2	3
12		1	0	1	2
13		1	0	0	1
14		1	0	0	1
15		0	5	3	8
16		0	1	1	2
17		0	1	0	1
18		0	1	0	1
19		0	1	0	1
20		0	0	2	2
21		0	0	2	2
22		0	0	1	1
23		0	0	1	1

gold wrapping may have tipped off some eagle-eyed soft power watchers. Switzerland topped the list among general respondents in good relations with other countries, safety and security, and appealing lifestyle, and we are sure that its world-famous chocolate had a part to play in the latter.

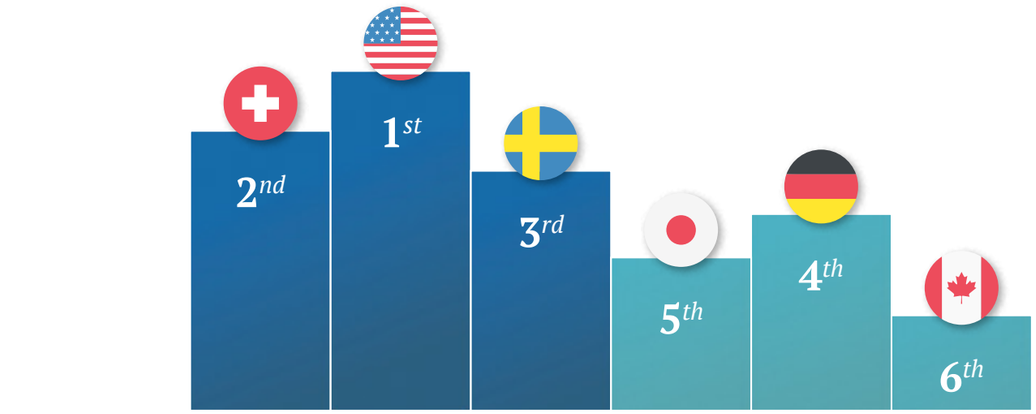
That being said, Switzerland did not secure top marks for food the world loves. Italy, in fact, won its one and only gold on this measure. Loved the world over from high-end restaurants serving truffle risotto with a fine Italian red wine, right down to a late-night aperitivo, we do not find this surprising. On this measure, France and Mexico take silver and bronze respectively. Remarkably, no representative from Asia features on the podium on this measure.

Our study found that perceptions of "La Dolce Vita" are now spread more broadly across the Mediterranean with Spain and the Spanish people deriving their two golds from the world's view that they are the most fun and friendly of any nation in the world. The people from the land of long lunches, late nights, flamenco, food-sharing and football are incredibly well-liked across the globe.

Sweden comes in at third place in the ranking topping the tables on trust, tolerance, educational system, and climate action. Generally, the country and its people are seen as good players on the international stage – doing their bit on the world stage.

Germany, in fourth place, is mainly famed for its strong economy and politics – winning gold medals for a strong and stable economy, respected leaders, political stability, good governance, and support for countries in need. It is clear that Germany's soft power is derived from its steadying political hand and the view that the rising tide that its economy has created will float all boats as opposed to the

Podium of Winners



	2nd	1st	3rd	5th	4th	6th
Global Soft Power Index Score	54.5	67.1	51.9	60.2	61.9	54.5
Total Number of Medals	12	12	12	9	12	13

softer, friendlier face we see from other European nations.

In 5th place, Japan also has four gold medals. The world views Japan as a technology titan, creating things people want the world over. Nintendo, Sony, Canon and Japan's many other leading tech brands have clearly helped propel it in this area.

Winning the most medals but not enough golds to rank higher than 6th place, Canada is the public's and specialists' favourite on 13 characteristics.

Perhaps surprisingly, the UK – which is third on soft power – does not make the top 10 table and holds no gold medals. It is strong across many measures but has failed to stand out on top on any.

As the medal table shows, each of the top soft power nations finds its place in the world by defining its image and differentiating itself from other nations. There are many routes to soft power and it is up to each nation to determine its own path. As world politics continues to transition to a new normal, we are sure our medal table will change with it.

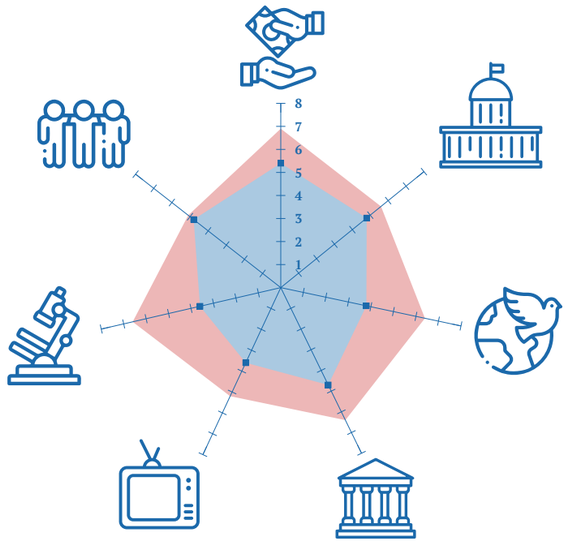
03
Soft Power Spotlights

What does soft power look like around the world?

- *Australia* | **The greatest place to visit in the world**
- *India* | **The most populous democracy in the world ranks 27th**
- *Ireland* | **The power of the diaspora**
- *Israel* | **Vibrant start-up scene makes nation a global tech hub**
- *New Zealand* | **Jacinda Ardern reinforces top marks for People & Values**
- *Singapore* | **Asian leader in Education & Science**
- *South Africa* | **On a high following Rugby World Cup victory**
- *Spain* | **More fun and friendlier than any other nation**
- *United Arab Emirates* | **Expo2020 and Emirates Mars Mission**
- *United Kingdom* | **Royal Family appeal holds firm abroad**
- *Central & Eastern Europe* | **7 CEE nations make the Index**
- *Latin America* | **Brazil leads the way**

Australia's performance compared to best in class per pillar

Best in Class *Australia's Results*



Australia

Rank #13
Score 48.8/100
7.0 Familiarity
7.2 Reputation
4.3 Influence

Australia has claimed the 13th spot in the Index with a Global Soft Power Index score of 48.8 out of 100, only marginally behind the Netherlands (48.9). Most notably, Australia is ranked 6th in the People & Values pillar and was declared the greatest place to visit in the world in the general public survey. The nation welcomes over 8 million tourists a year from across the globe who are eager to visit the land down under, with hopes to soak up the fun and friendly culture.

Australia is a stable and reliable parliamentary democracy which is reflected in the nation being ranked in the top 10 for Governance. Owing to the country's geography, Australia has primarily focused on building trade relations in the Asia-Pacific region. 75% of the nation's exports are destined for the region with this alliance dating back to the aftermath of World War Two.

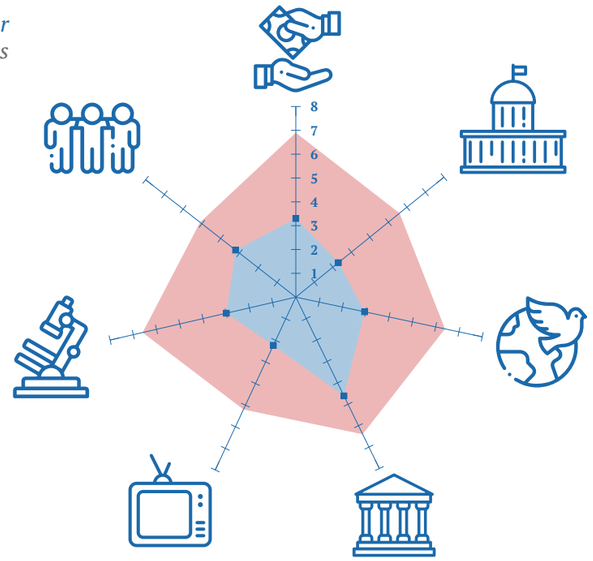
The Australian government has, however, drawn criticism from some quarters for its resistance to take decisive steps to address climate change. As one of the world's biggest per capita greenhouse gas emitters and one of the world's largest producers of coal, the nation is under the spotlight, facing scrutiny from the UN regarding its perceived modest goals. At a time when the bush is burning at an unprecedented rate, destroying houses and habitats alike, how the nation's leaders respond will be pivotal in either building or damaging external perceptions.

Australia's solid reputation globally is a testament to its strong and stable political and economic environment and its general appeal of being home to fun and friendly people. Through its robust relationship with the US and the Asia-Pacific region, the nation has continued to defy its distant geography and successfully wield its soft power on the global stage.



India's performance compared to best in class per pillar

● *Best in Class* ● *India's Results*



India

Rank #27
Score 41.6/100
6.8 Familiarity
6.0 Reputation
4.5 Influence

As the world's 27th soft power nation and with a Global Soft Power Index Score of 41.6 out of 100, India is leading the charge amongst its South Asian neighbours in the soft power stakes, but clearly underperforms relative to other leading nations, given the size of its population, economy, and its rich heritage.

Nevertheless, India is to be commended for the way in which it has invested in cultural diplomacy and for the major investments in global tourism spend. Prominent marketing of its "Incredible India" slogan has attracted a growing number of foreign visitors to India, raising awareness of the country's diverse historical, cultural and numerous UNESCO world heritage sites which promote it as an appealing destination for travellers. This rings true with the general public survey findings where India scores 6.8 for Familiarity.

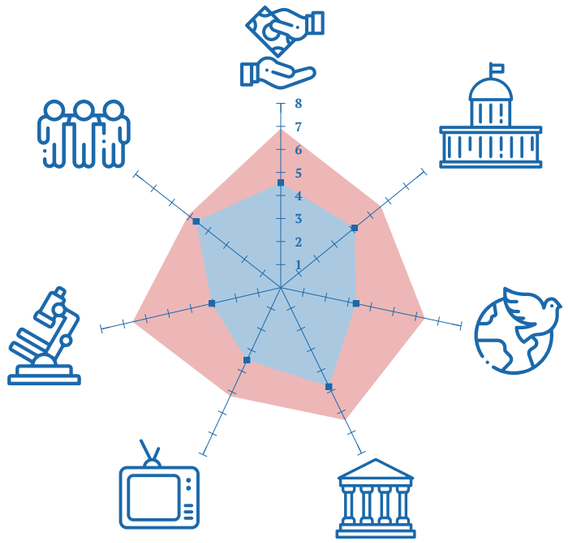
The work of The Indian Council for Cultural Relations (ICCR) is a perfect example of India's soft power priorities, as the government entity ramps up its presence to foster and strengthen mutual understanding between India and other nations. A fine example is The Nehru Centre in London, which acts as the cultural wing of The High Commission of India in UK. Established in 1992, it is regarded by ICCR as its flagship cultural centre abroad and has emerged as a premier institution engaged in India's cultural interface with the UK.

Following the controversial revocation of autonomy for Kashmiris by the Hindu-nationalist Bharatiya Janata Party (BJP)-led government, India must build upon its soft power strengths instead of turning to more hard power initiatives.

Yoga and Bollywood are two of India's finest soft power tools. Bringing in tourism and talent, both can be seen as working their magic in order to boost India's global image and project is as a peaceful rising power on the world stage.

Ireland's performance compared to best in class per pillar

● *Best in Class* ● *Ireland's Results*



Ireland

Rank #24
Score 43.0/100
5.8 Familiarity
6.7 Reputation
3.6 Influence

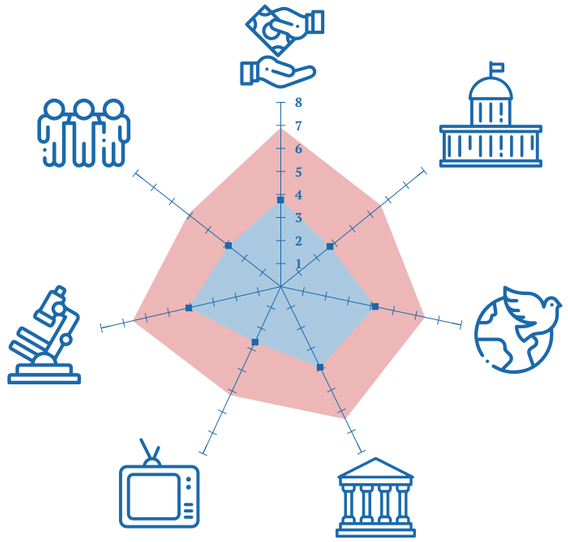
Ireland ranks 24th in the Index, achieving strong scores for the Governance (17th), Culture & Heritage (15th), and People & Values (10th) pillars. The popularity of its people is undoubtedly helped by its proud diaspora, which is estimated to include up to 100 million people globally, and helps spread Irish culture to the world, as evidenced by the estimated 7000 Irish-themed pubs that exist outside of Ireland. As a nation known for its warm and generous people, beautiful scenery, and lively nightlife, it is not surprising that Ireland is perceived as a great place to visit (8th).

However, Guinness alone cannot generate soft power. Ireland has struggled to translate its popularity as a tourist destination, its shared values and large diaspora into any significant influence on global policy making and influence in diplomatic circles. Ireland's Taoiseach may have wielded significant influence in the Brexit negotiations, but outside of Europe, the nation is still not considered an important player. The government has, however, set clear intentions of stepping up Ireland's global presence through the launch of Ireland's Global Footprint to 2025 - a move well timed, as power dynamics shift south and east and as the nation's top trading partner, the UK, has left the EU, leaving a veil of uncertainty.

Despite Ireland's rich cultural heritage and well-known hospitality, the nation has not been able to break into the Global Soft Power Index top 20. Unfortunately, and as frequently discussed, Brexit is likely to have a significant effect on the Irish economy and this could diminish Ireland's potential soft power. Ireland still has the capability of being a significant player in the world of international affairs, but it would need to more effectively leverage its diaspora as well as the tourism sector, much as Israel has in the past decade.

Israel's performance compared to best in class per pillar

Best in Class *Israel's Results*



Israel

Rank #25
Score 42.6/100
6.0 Familiarity
5.7 Reputation
4.4 Influence

Israel's influence on the world stage continues to grow, despite regional conflicts and a shaken domestic political arena. Although Israel ranks 25th on the Global Soft Power Index, it achieved an impressive score for overall Influence (16th).

Israel has placed tourism at heart of its nation branding strategy, with the government launching extensive marketing campaigns to raise awareness of what the nation has to offer. While the 'Visit Tel Aviv' campaign may have helped draw European sun-seeking tourists to its beaches, active nightlife and LGBT friendly environment has helped reinforce shared values. Worth noting is also the work of a non-governmental organisation managing Israel's nation brand, Vibe Israel, working on transforming global perceptions of Israel, through initiatives including inspiring social media influencers to visit the country. Subsequently, Israel ranks close to many European nations in Familiarity. Israel's tourism sector also benefits from its many religious landmarks, with general public respondents ranking Israel highly for its rich heritage (11th).

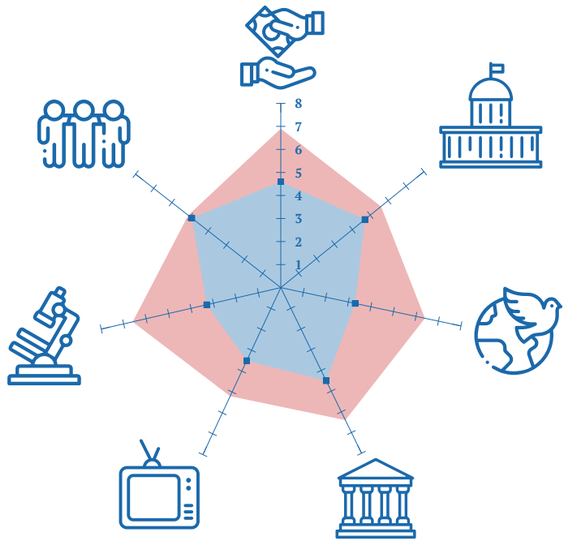
Israel's reputation as a 'start-up nation' is backed by a perception among both the general public and specialist audiences that it is a global hub for technology, reflected in the high 16th rating for the Education & Science pillar. Israeli startups, such as Waze and Sodastream are now household names across the world.

Despite this, Israel still has room for improvement. The nation suffers from the perception that it has poor relations with other nations (57th) and is ranked 50th among general public respondents for tolerance.

Israel proves that small nations can punch well above their weight when it comes to their soft power. Israel has successfully leveraged its diaspora and keen marketing awareness to portray a modern brand around the world, in the process increasing its soft power and ranking highly on influence around the world.

New Zealand's performance compared to best in class per pillar

Best in Class *New Zealand's Results*



New Zealand

Rank #22
Score 43.5/100
5.9 Familiarity
7.0 Reputation
3.5 Influence

New Zealand is in 22nd position in the Index with a score of 43.5 out of 100. The large disparity between New Zealand's Reputation rank (14th) on one hand, and its Familiarity (30th) and Influence (37th) ratings on the other, highlights that despite its appeal, both as a great place to visit and for its lifestyle, the nation lacks clout and suffers from geographical remoteness, preventing it from wielding the same levels of soft power as its European counterparts.

Akin to its neighbour Australia, New Zealand scores very highly in the People & Values pillar, ranked in 4th position with a score of 4.9, with the majority of respondents perceiving New Zealanders to be generous and friendly people. This, paired with the nation's high score and 11th rank in Governance, is seen by many as a result of the progressive leadership of Prime Minister Jacinda Ardern, who has been lauded on the global stage for her response to a number of crises since the terrorist attack in March 2019.

Being one of the most popular places to visit in the world, tourism is vital for the nation and serves as the largest industry in terms of foreign exchange earnings. The annual influx of tourists to New Zealand significantly increased as a result of the hugely popular Lord of the Rings film franchise.

New Zealand's sports diplomacy is also one of the nation's greatest strengths. The All Blacks are admired globally and are frequently referred to as the greatest rugby team in the world. The fame of the All Blacks has landed New Zealand 18th rank among the general public for the leaders in sports category.

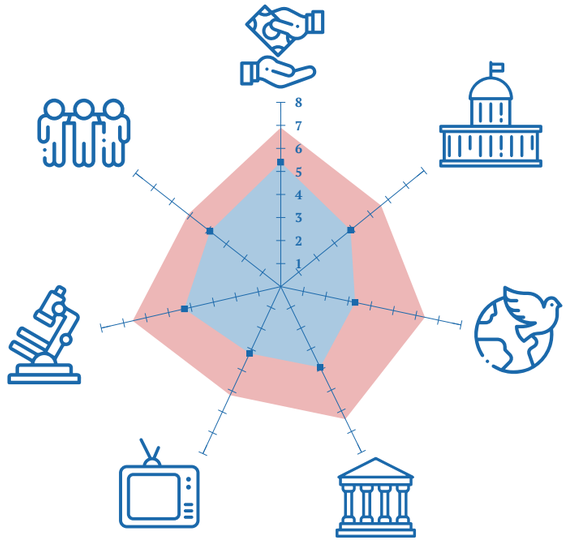
New Zealand is certainly punching above its weight in the Index, especially considering its modest population and isolated location. The nation maintains a solid reputation, which has arguably continued to grow exponentially over the last year or two under the respected leadership of the socially-progressive Jacinda Ardern. The nation can serve as a shining example of how to build a tolerant and inclusive society in the face of adversity.





Singapore's performance compared to best in class per pillar

Best in Class *Singapore's Results*



Singapore

Rank #20
Score 44.8/100
6.1 Familiarity
6.8 Reputation
3.9 Influence

Singapore ranks 20th in the Global Soft Power Index. It is the highest ranked nation in Southeast Asia, and scores well amongst both the general public as well as specialist audiences. Amongst the general public, Singapore's soft power is primarily driven by ease of doing business (2nd) and popularity as a great place to visit (11th). Singapore has succeeded as a tourist destination, in part thanks to its national carrier, Singapore Airlines, whose wide network has made Singapore and its impressive Changi airport more easily accessible to millions around the world. This has helped expand its soft power reach, connecting the city state to the world, and enabling it to succeed as a financial hub. Specialist audiences rank Singapore as the 9th in the world for its Business & Trade. Singapore's perception as hub of global finance is well established, and the city state is often mentioned in the same breath as London, New York, and Hong Kong, as a preferred business destination.

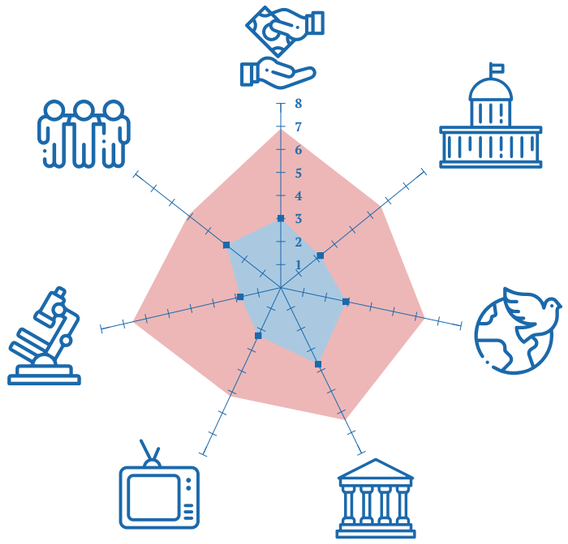
Singapore also draws soft power from its perception as a leader in Education & Science, ranking 12th in the world and 4th in Asia. But the nation has also shone in exhibiting the deft touch needed to successfully balance soft and hard power. This is evidenced through the rigorous two-year conscription it enforces on all high school graduates.

Singapore ranks 18th for Governance, a particularly impressive feat given that Singapore remains effectively a one-party state under Lee Kuan Yew's People Action Party. Internationally, Singapore's successful hosting of the Trump-Kim summit evidenced its rise to that of a serious player in global affairs, while its star role in the film adaptation of Kevin Kwan's Crazy Rich Asians reminded viewers that Singapore is more than just a financial and transport centre. But Singapore still struggles to portray its unique identity outside of these fields, ranking only 35th in Culture & Heritage. Singapore was rated low by the general public respondents for heritage (57th), sports (38th), and influence in arts (35th). Singapore may have room to improve but it is undoubtedly the inspiration for Southeast Asian nations which seek to garner international influence.

Singapore continues to shine in its global influence. The city state has set the standard on building a business-friendly, dynamic, and modern environment while maintaining its authentic roots and culture. The Lion City is on track to keep growing on the basis that it can maintain its appeal to expats and tourists alike.

South Africa's performance compared to best in class per pillar

Best in Class *South Africa's Results*



South Africa

Rank #36
Score 36.4/100
5.9 Familiarity
5.8 Reputation
3.8 Influence

South Africa, with a Global Soft Power Index score of 36.4 out of 100, is in 36th position in the Index. The nation has grappled with a variety of complexities throughout the latter half of the 20th Century to present. The turbulent repercussions of Apartheid, are still very much being felt today and the seemingly positive post-Mandela years have been demolished by corruption and the legacy of Jacob Zuma.

South Africa is ranked 37th in the Governance pillar, recording a particularly low score for ethical standards and corruption (53rd). The scandals surrounding the 9-year long presidency of Zuma, not only saw the involvement and subsequent dent in the reputation of global firms, and the demise of Bell Pottinger, but it eradicated the already precarious trust in the South African government.

Described as the gateway to Africa, South Africa boasts the most sophisticated and developed economy in the region. In comparison to the rest of Sub-Saharan Africa, the nation has fairly efficient infrastructure, however, with continued challenges with electricity supply and problems with debilitating levels of unemployment, the nation fails to score highly in the Business & Trade pillar (ranked 36th). Still, the only other Sub-Saharan nation in the ranking, Nigeria, trails South Africa on almost all metrics, with an overall Global Soft Power Index score of 28.8 out of 100 and placing 56th.

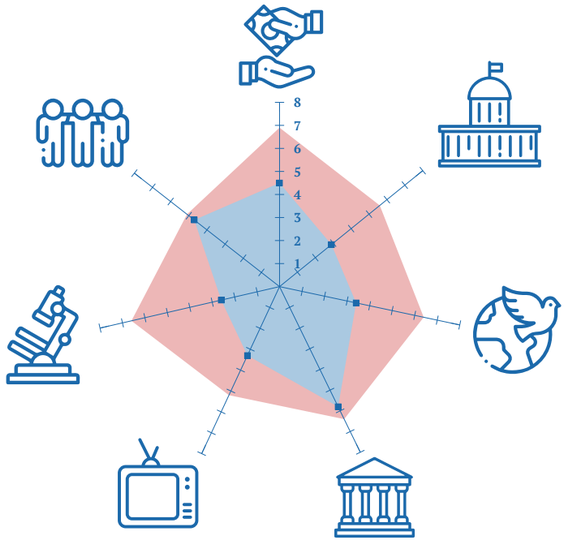
South Africa is regarded highly for its sporting prowess, ranking 17th globally among the general public. From hosting the 2010 FIFA World Cup to the Springboks claiming their third Rugby World Cup victory in 2019, South Africa has attempted to utilise the strength of its sport culture to advance on the global stage, a success reflected in its Familiarity score of 5.9 (28th position).

We are hopefully witnessing the beginning of a positive period of change for South Africa, but there is no denying that the task ahead of President Ramaphosa is monumental. South Africa needs to focus on inward investment first and foremost through rebuilding trust and tackling the nation's internal grievances, before turning attention outwards.



Spain's performance compared to best in class per pillar

Best in Class *Spain's Results*



Spain

Rank #16
Score 47.6/100

7.5 Familiarity
6.9 Reputaion
4.7 Influence

Spaniards are more fun and friendlier than any other nation, according to the Global Soft Power Index 2020. Spain ranks 16th out of a total of 60 nations with a final score of 47.6 in terms of overall soft power, compared to the global average of 40.8.

This is largely driven by the fact that Spain is undoubtedly still an international benchmark as a nation of leisure and tourism - a sector that contributed 14.6% to the national GDP in 2019. That strength is how the nation exerts the greatest influence on other nations, according to our study.

Spain occupies the eighth position in terms of Familiarity with the nation. Only United States, United Kingdom, France, Germany, Italy, China and Japan surpass this achievement.

Spain is also seen as an excellent place to visit (rating 7.5 on average 6.0) and, internationally, food and cuisine is extremely well thought of (well above the average, 5.0 compared to an average of 3.1), historical heritage (5.6 on the average of 4.6), art (4.8 on the average of 3.0) and its attractive lifestyle (4.5 over the average of 3.2).

In addition, Spain stands out as a nation which exerts influence thanks to sports. With a rating of 4.4, Spanish sports double the average international influence established at 2.3. According to the Brand Finance Football 50 2019 ranking, Real Madrid is the most valuable and strongest football brand in the world. But Spain is a leader in many other sports such as tennis, handball, cycling, swimming, motor sports, and figure skating among others.

Despite these positive results, Spain's performance is mixed in other areas and particularly in Governance, International Relations and Education & Science.

In terms of Governance, Spain's results are a mixed bag. It is perceived in a very similar position as Poland, better than Israel and worse than



Portugal. Although considered well above average for political stability, Spain scores unusually low for ethical standards and corruption, lagging behind its European neighbours. This is likely a result of high-profile corruption cases involving senior members of historic Spanish governments. Unsurprisingly, Spanish leaders are not well respected internationally in comparison to the global average.

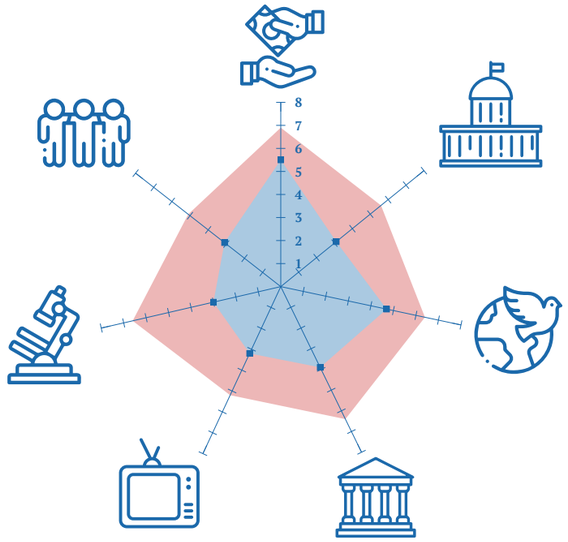
Recent issues involving Catalonia, troubles building a coalition government, and the lingering – and very deep – impacts of the Great Recession have presumably harmed Spain on these measures. Strength and stability at home is obviously a precursor for influence abroad – shown by its below average results on influence in diplomatic circles. We will have to see over the next few years if Spain can surmount these issues.

Despite these political issues and middling diplomatic influence, the world considers Spain to have brands the world loves. However, ratings for the stability of the Spanish economy are only around the global average, for ease of business are similarly average, and so need to be improved in order for it to build foreign investment particularly in the area of leading-edge technology, where Spain is well below average.

Overall, Spain is a very influential nation and has the potential to be as soft power superpower, but problems with Governance are dragging performance back. Influence is not only about the beauty of a country and its people – which Spain has enough of to spare – it is also about stability and order at home. Spain and its new government have work to do but they have the resources and people necessary to do it and their potential should not be underestimated.

UAE's performance compared to best in class per pillar

Best in Class *UAE's Results*



United Arab Emirates

Rank #18
Score 45.9/100

5.8 Familiarity
6.6 Reputation
4.7 Influence

As the Middle East's highest ranked soft power nation, the United Arab Emirates is in 18th position in the Index and receives a soft power score of 45.9 out of 100.

The UAE's main soft power strength is its appealing business environment, stable economy and consensus that it is a great place to do business in and with. Scores are solid but lag behind market leader nations such as Singapore, Switzerland and the US.

International relations are not seen as especially strong by specialist audiences, but the general public is less aware of this, and acknowledges the UAE's international engagement.

The UAE's reputation is weakest across science and technology specifically, although this could be set to change drastically since the recent announcement of the Emirates Mars Mission, a planned space exploration probe mission to Mars launched by the United Arab Emirates Mohammed bin Rashid Space Centre. Carried out by a team of Emirati engineers in collaboration with foreign research institutions, the Mission is a contribution towards a knowledge-based economy in the UAE. The probe is scheduled to reach Mars in February 2021, which coincides with the 50th anniversary of the United Arab Emirates' formation.

The UAE's reputation is broadly favourable, with majorities believing that it is on balance a positive influence on the world, but there is clearly room for improvement. Familiarity is highest in the MENA region and those with significant expat populations based in the UAE such as the Philippines and the Subcontinent, but noticeably weaker in Latin America and G7 countries and among academics surveyed.

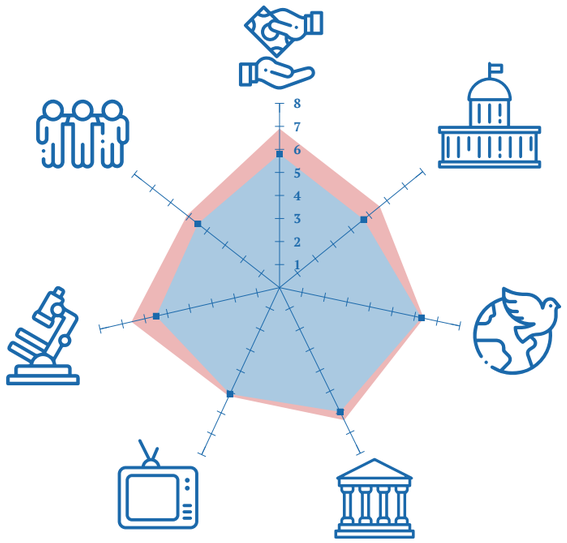
The UAE's positive brand image, such as its new unified Nation Brand unveiled in December 2019, has allowed the young nation to succeed when other Arab states have faltered. The UAE is a pioneer in the region, has become a real magnet for creative and entrepreneurial talent and has undoubtedly surpassed the traditional powerhouses of Arab culture and education of Cairo, Baghdad, Beirut and Damascus which have been blighted by civil unrest, political instability and economic deterioration. Coupled with its visionary and stable leadership, it is this shift of power in the region has aided the UAE's efforts to gain influence.

All eyes will be on the UAE as Dubai gets set to host this year's Expo2020 from October. Touted as the greatest show on earth and opening its doors this October to over 25 million visitors with more than 190 nations participating, this milestone will be the ultimate extension of Emirati soft power.



UK's performance compared to best in class per pillar

● *Best in Class* ● *UK's Results*



United Kingdom

Rank #3
Score 61.8/100
8.2 Familiarity
7.3 Reputation
6.3 Influence

The United Kingdom is ranked 3rd in the Index, with a soft power score of 61.8 out of 100, only marginally behind Germany in 2nd with a soft power score of 61.9. Throughout its history, the nation has reaped the rewards of its central geographical location, the use of the English language as the most widely spoken and written language in the world and the popularity of the British Monarchy.

The Queen and the Royal Family have been pivotal in maintaining the nation's relevance as Britain's economy and hard power are being dwarfed by the rise of the East. The Queen is a powerful symbol of the nation and is one of the world's longest reigning monarchs. Royal weddings for the younger generations have garnered unprecedented levels of media attention, with estimated global audiences of two billion people across 180 countries, debunking theories that the Monarchy is outdated and irrelevant.

The UK scores particularly well in the International Relations pillar, claiming 2nd spot with a score of 6.3 out of 10. Despite the uncertainty that has engulfed the nation and the negative coverage that has arisen post-Brexit, the UK is still highly influential in diplomatic circles. The UK does fall short, however, in its relations with other nations, where it is ranked a poor 15th – potentially a repercussion of Brexit or a negative legacy of the Empire.

Arguably one of Britain's greatest soft power tools is the BBC, which reaches a colossal 426 million viewers and listeners abroad per week. The BBC's high level of credibility is reflected in the UK's 2nd place ranking in the Media & Communications pillar with a score of 5.1. The success of the media powerhouse in leveraging soft power has not gone unnoticed globally, with several nations attempting to emulate the service through launching their own global networks.

The UK ranks in the top 3 for the Culture & Heritage pillar and scores particularly well for its influence in arts and entertainment and for its rich heritage. Throughout its history, the allure of Britishness and British culture has prevailed, from Shakespeare in the 16th Century to the hugely popular British period TV dramas such as "Downton Abbey" or Netflix's "The Crown", which have amassed a cult-like following.

The UK's 3rd place ranking in the Global Soft Power Index is a clear indication to the world that Brand Britain will not be tarnished by Brexit, despite the uncertainty that has engulfed the nation for over three years. Boris Johnson and his Government certainly have a tough road ahead of them to showcase to the world what a Global Britain looks like, but the sheer force of the UK's soft power shows no signs of diminishing.

Central & Eastern Europe

There are seven Central & Eastern European nations that have been ranked in the Global Soft Power Index: Poland in 35th (36.6); Czech Republic in 39th (34.4); Croatia in 43rd (32.4); Hungary in 45th (31.9); Ukraine in 46th (31.7); Estonia in 47th (31.7); and Romania in 52nd (30.4). The mismatch of the nations' relatively positive Reputation with low Familiarity and Influence rankings, highlights the challenges ahead of the region to emerge as a global soft power powerhouse.

Estonia records the largest disparity between rankings, in a dismal 60th position for Familiarity and 57th for Influence versus a solid 27th for Reputation. Estonia has made a name for itself in digital innovation and through its e-government policies, making it one of the most forward-thinking European nations. Unsurprisingly therefore, the nation ranks highest in the region for Governance (22nd), Education & Science (26th), and Media & Communication (28th). However, as one of the smallest nations in the region by population, with a modest 1.3 million citizens, Estonia lacks the clout to boost its influence.

The economic transformation of Central & Eastern Europe following the collapse of communism has been remarkable. We have witnessed the complete overhaul of entire economies now operating as successful, stable and modern markets. However, the region needs to focus on initiatives that allow the nations to distinguish themselves, both from each other and on the global stage, in order to improve their soft power capabilities.

Several of the region's nations are underperforming in the Index relative to their economic prowess. Following the fall of communism three decades ago, the nations' economies have boomed, bolstered by acceptance into the EU and NATO, however their distribution in the lower half of the Index clearly indicates that their soft power status is far from competitive with their Western European counterparts.

Arguably one of Europe's biggest economic success stories, Poland has celebrated continuous economic growth, driven by strong domestic demand, increased foreign direct investment, and solid productivity, all of which have been accelerated by significant inflow of EU cohesion funds, reflected in the nation's 24th rank for ease of doing business and 27th rank for economic stability. Nevertheless, currently witnessing the rise of populism and threats to the rule of law, a potential result of post-transformational fatigue and delayed resistance to the Western liberal narrative, Poland is putting the achievements of the past decades at risk.



Latin America

With a Global Soft Power Index score of 39.4 out of 100, Brazil leads the charge in Latin America as the highest-ranking nation, in 29th position in the Index and an impressive 13th in Familiarity. Despite a mixed legacy of both international sporting events, hosting the FIFA World Cup in 2014 and the 2016 Olympic Games has undoubtedly put the nation in the spotlight, driving its Familiarity with fans and viewers around world. A football powerhouse, Brazil is perceived by the general public as a leader in sports, which has boosted the nation's Culture & Heritage score (8th). The far-right leadership of President Jair Bolsonaro has divided Brazil, perhaps a cause of the particularly unfavourable score in the Governance pillar. For more analysis and insight on Brazil's results and rankings refer to the Results Snapshot on p. 72.

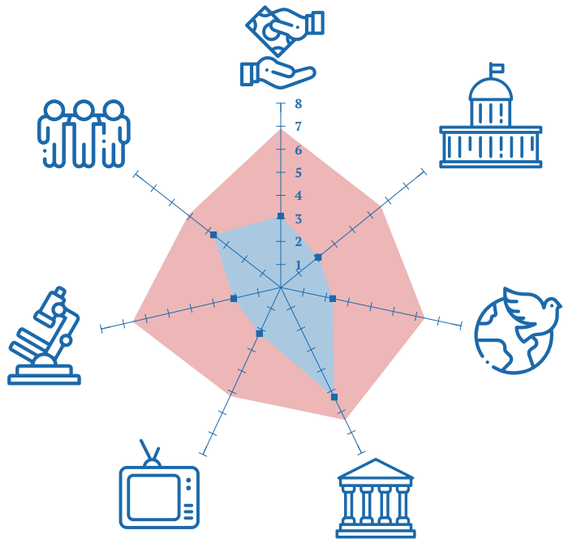
Brazil's South American neighbours are dotted around the bottom third of the Index. Suffering from a deep recession and shortages of basic goods, Venezuela (ranked 55th with a score of 28.8) is the lowest-ranking South American nation, perceived by the general public as politically unstable and corrupt. Similar scores are recorded in Colombia (ranked 49th with a score of 31.5) and Peru (ranked 51st with a score of 30.8), whose soft power performance is hindered by low Governance ratings. However, both nations are being highly regarded by the general public for their cuisine, heritage, and friendliness. Likewise, protests against social inequality in Chile (ranked 44th with a score of 32.2) and human rights abuses in Argentina (ranked 40th with a score of 33.9) have been the focus of international media in the last few years, damaging their soft power.

South American nations have a tough road ahead of them to differentiate themselves on the global stage as their individuality, culture, and heritage is often tainted by the shroud of crime, poverty, and corruption widely reported by the international media. One could argue that these nations should strive for internal change first and foremost, before they can begin their external soft power initiatives.

Latin America's second most populous nation, Mexico, ranks 37th in the Index, with a Global Soft Power Index score of 35.6. There is a large disparity between Mexico's Familiarity ranking (21st) and its Reputation ranking (43rd) as the nation grapples with extremely high levels of crime and corruption is prevalent. Under Trump's presidency, the bilateral relationship with the US has reached peaked tensions as the border issue and migrant crises prevail. More positively, like its South American counterparts, Mexico is home to some of the world's favourite food and has scored well for being home to fun people.



Brazil's performance compared to best in class per pillar
● *Best in Class* ● *Brazil's Results*



Brazil

Rank #29
Score 39.4/100

Rank	*Score*	
13	**6.9**	**Familiarity**
13	*6.6*	*General Public*
15	*7.6*	*Specialist Audiences*
32	**6.1**	**Reputation**
30	*6.2*	*General Public*
35	*5.5*	*Specialist Audiences*
21	**4.0**	**Influence**

Who perceives Brazil as influential?

21	*3.8*	*General Public*
8.0		*Argentina*
6.2		*Portugal*
5.0		*Mexico*
3.6		*United States*
2.6		*Kazakhstan & Uzbekistan*
20	*4.6*	*Specialist Audiences*
1	5.2	*Think-tanks & NGOs*
2	4.7	*Politics*
3	4.7	*Business*
4	4.5	*Media*
5	4.4	*Analysts*
6	4.2	*Academia*

Who perceives Brazil as a great place to visit?

73%	*Southern Africa*
41%	*United States*
41%	*Mexico*
36%	*Portugal*
18%	*Japan*

The Global Soft Power Index provides unique insight into the perceptions of soft power of 60 nations from all continents. With responses from over 55,000 from more than 100 countries and territories, the data can be analysed across audiences, geographies, key metrics, and performance on each of the 7 Soft Power Pillars as well as the underlying 30 characteristics.

Get in touch at
softpower@brandfinance.com
to access the data or request a performance report.

● *Light blue bars* | Brazil's Results ● *Red digits* | Best in Class ● *Dark blue bar* | Metric in Spotlight

Business & Trade	*A strong and stable economy*	3.3	8.6
	Easy to do business in and with	3.7	6.0
	Products and brands the world loves	3.3	6.6
Governance	*Politically stable & well-governed*	4.7	5.8
	Respects law and human rights	1.8	4.8
	High ethical standards and low corruption	1.8	5.2
	Safe & secure	1.9	6.0
	Respected leaders	1.8	4.8
International Relations	*Influential in diplomatic circles*	2.4	7.2
	Good relations with other countries	3.7	6.4
	Helpful to other countries in need	2.6	5.5
	Acts to protect the environment	2.3	5.4
Culture & Heritage	*Rich heritage*	4.3	7.5
	A great place to visit	6.8	8.2
	An appealing lifestyle	3.1	5.7
	Influential in arts and entertainment	4.1	6.3
	Food the world loves	3.1	6.6
	Leaders in sports	5.6	6.3
Media & Communication	*Influential media*	2.6	7.3
	Trustworthy media	2.0	4.3
	Affairs I follow closely	2.5	3.8
	Good communicators	2.9	5.6
Education & Science	*Strong educational system*	4.6	7.3
	A leader in science	2.0	5.7
	Leading-edge technology	2.0	6.3
People & Values	*Friendly*	5.0	5.6
	Fun	4.6	5.0
	Generous	2.6	4.4
	Tolerant	3.2	4.2
	Trustworthy	1.9	4.7

04
Contributions

What do the experts say?

- *Peter Fisk* | **Soft Power Megatrends**
- *Professor Nicola Kleyn* | **The Trials of South Africa's Soft Power**
- *Bahar Gidwani* | **Regulation Gives Way to Consultation**
- *Paul Brummell* | **The Role of Soft Power in Foreign Policy**
- *Amish Tripathi* | **The Spread of Indian Soft Power**
- *Lord Sebastian Coe* | **The Power of Sport in Global Diplomacy**
- *Professor Richard Sambrook* | **The Importance of Media Influence in the Information Age**
- *Dr Rula Al Abdulrazak* | **The Role of Education & Science in Supporting a Nation's Soft Power**
- *Omar Salha* | **Bridging and Building Community Cohesion Through Faith and Soft Power**



Peter Fisk
Global Thought Leader,
Professor of Leadership
and Strategy, IE Business
School, Madrid

Soft Power Megatrends

We live in a time of incredible change. Dramatic, pervasive, and relentless. More change in the next 10 years than the last 250 years. The challenges are numerous, the opportunities are greater. Incredible technologies transforming our lives and work, expectant consumers and disruptive competitors, power shifts economically and culturally, climate crisis and social distrust.

The 2020s will be a decade of transformation. It will be a decade of shifting power. Whilst we used to think of power as hard and hierarchical, new power is soft and social. I call it "Meta Power" because it goes beyond our traditional sources of power, and boundaries of control. In particular it goes beyond nations, beyond the power nodes and codes of the past.

Thunberg is more respected than Trump, U2 has more influence than the UN, Messi is more followed than Macron. Leaders realise that social media is more effective than press releases, nations realise that culture is more potent than politics, media realise that people love stories of real people beyond celebrity. The best brands win through word of mouth rather than advertising, music and movies are promoted through immersive experiences.

Meta power goes beyond nations

Meta power is not about having the largest army, it is about having the best story. It harnesses the new structures of our society, and is achieved through inspiration and influence. It comes from the voice of people who are loved and respected. It is the emotion stirred through culture and sport. It is the actions that positively contribute to a better society, healthier and happier. It is less tangible and less structural, more human and collaborative. It is a pull not a push, a carrot not a stick.

Think about reality television which immerse people in trivial yet everyday lives. Think about the most memorable Olympic stories: Jesse Owens as he undermined Hitler in Berlin or Eric "the Eel" Moussambani who had never swum in a pool before the Sydney Olympics.



We are only starting to appreciate the seismic nature of change in our world, technologically and socially, and how it is changing the very concepts of power.

We are all familiar with how the smartphone has transformed the way we live, how we shop and connect, how we work and learn, how we vote and identify ourselves. The rising economies of Asia, its new brands and new middle class, transform business, but also the power behind movies, fashion, and sports: Jurassic Park to Harvey Nichols, Volvo Cars to Weetabix.

We might be concerned about Huawei, we should probably be more concerned about TikTok, and its disruptive impact on our children. Indeed, artificial intelligence will be the most powerful transformative force of all, with its applications from genetic recoding to self-learning machines.

Take a look at three megatrends shaping our decade ahead, and the consequences for power, be it for nations, and also for entities that exist beyond or across nations:

1. Cities are the new the power nodes

Rapid urbanisation is redefining our world, the nature of markets and nations. 1.5 million more people live in cities every week. By 2025, Asia will be home to 33 of the world's 49 megacities, of over 10 million people. In fact, China expects to have 200 cities with a population of over one million people by 2025. To tackle overcrowding in Beijing, China is building a new city – Xiongan New Area – from scratch 100km southwest of the capital. Delhi will replace Tokyo as the world's largest city, whilst all 10 of the world's fastest growing cities will be in India, with the port of Surat growing fastest of all.

Economic growth is driving the rise of a new global middle class, 3.2 billion people today, growing across Asia to 5.3 billion by 2030, the world's fastest growing market. At the same time, people have migrated across the world. Nations are increasingly heterogeneous, multi-cultural and diverse. Over 350 million people live in a different country from their birth, a number that will triple in 10 years. Diasporas and tribes, driven by culture or religion, a love of hip hop or running will spread across the world, dispersed but connected. "Meta power" lies in the new communities of cities, and the global tribes of the future.





2. Social issues are the new power drivers

Environmental threats are intensifying, challenging our desire for industrialisation and progress, demanding a new balance between short- and long-term impacts. As individuals and brands embrace more resource-efficient behaviours, from bike-sharing to material recycling, social and environmental issues have become critical drivers of decision making. 66% of consumers, including 73% of millennials, say they will pay more for environmentally friendly products.

Last year Formula 1 pledged to become carbon-neutral by 2030, and to make all grand prix sustainable by 2025. For a sport with a 250,000 tonne carbon footprint, that transports 10 teams to 21 races around the globe, this is a huge commitment, and demonstrates the shift in society's priorities. In a world under threat, people seek positive solutions, authenticity and hope, more human and sustainable solutions. Economic inequality is at an all-time high, whilst trust in all types of institutions is at an all-time low. "Meta power" lies in stories of humanity, and improved lives and social progress.

3. Technology platforms are the new power brokers

Connective technology means that by 2020 there will be 7 times as many connected devices as people on the planet. The power of networks, formal and informal, grows exponentially, as we can see from the rise of new platform-based companies – Alibaba to Amazon, Airbnb to Netflix. They thrive as exchanges, fuelled by immense amounts of data. 90% of all data on the planet was created in the last 2 years. Intelligence accelerates growth, through personal relevance and precision influence. These businesses realise that they don't need to be big to be powerful, instead they are smart and collaborative. Maybe this is a model for the future of nation power.



AI accelerates the data trend, from driverless cars to smart homes, personalised medicines to brain-linked controls. 90% of stock market trading is now done by algorithm. Look too at the addictive power of participation through technology – 2.2 billion people now participate in gaming, more than any other social activity, whilst games like Fortnite drive youth culture and aspiration. "Meta power" lies in the hyper-connectedness and intelligence achieved through technologies, augmenting and fusing with the real world.

Power drivers of the future

Let's consider the seven drivers or Soft Power Pillars, and how the "megatrends" are shaping each of these domains, together with the implications for power:

Business & Trade … Power shifts to the network facilitators

The world's economies are now massively interconnected, both in trade flows, and in terms of the technological platforms which support them. We see this, for example, in the rise of platform businesses, where 6 of the world's top 10 companies are "platforms", bringing huge numbers of suppliers and customers together in global ecosystems. We see this in the cloud services like those of Amazon and Alibaba which underpin most of the world's digital platforms. We see it in investments, where Japan's Softbank, funded to $100m per year by Saudi Arabia's sovereign wealth fund is the largest investor in technology companies, from ARM to Uber. We see it in payments, where Ireland's Stripe now facilitates the world's online payments, and China's PingAn in cryptocurrencies. These "facilitators" are the new power brokers of international business. They thrive on their connections not their locations, their data not their infrastructure. Power is in their digital networks.



Governance … Power shifts to those who own the data

Across the globe, we see a huge shift towards more nationalist and populist governments, seemingly pulling back from globalisation. In western governments we see an increasing polarisation of politics, and the loss or reasoned debate. Power seems fragile and transient. Elsewhere we see the reassertion of authoritarian power, perhaps with increasing desperation to stay on top of restless citizens mobilised by their connectedness to the world, and each other. We saw the rise of social power in Egypt, for example, toppling old dictators. Most significant however is the role of data in the changing nature of Governance. In Estonia we see the opposite, citizens e-voting every day in a fest of empowered democracy. From data, privacy becomes increasingly valuable, as a currency of transaction, and therefore of power.

International Relations … Power shifts to those who address the big issues

The most topical issues at the United Nations right now, and increasingly in the boardrooms of business, is climate change. Extreme weather and ecological destruction have finally alerted publics to the urgency of the situation. And to its complexity. From the plastics littering our beaches to the beef-farming driving carbon emissions, from the industrialised legacy of the west, to the carbon-fuelled ambition of the east, we realise that this is an interconnected global challenge. The same goes for other issues - global migration across the world, mineral resources under the Arctic, the colonisation of space. These are not issues caused by, or solvable by individual nations. Power goes to those who step up to collaborate, and respond to issues that matter most to people of the world.

Soft Power Megatrends | **Peter Fisk**

People & Values ... Power shifts to communities who share our values

Global migration continues to accelerate, meaning that cultures and values spread across boundaries following their diasporas. Like they have through history, but now faster and further. Physical locations, in particular huge megacities, become melting pots of multiple ethnicities and cultures, outlooks, and values. This diversity creates a vibrant and creative society, but also challenges the old norms where places had their traditions and ways.



The bigger change is in people becoming more individual, which in some ways, is the consequence of diversification. Each person has an increasing sense of self, and our identity, and demands to be treated not as an average but as individuals. Trust shifts in this world, from traditional institutions and hierarchies, to networks, to people who we identify with most - family and friends, people who share similar experiences or passions. Power grows within communities, from peer to peer, enabled by our digital connectedness.

Education & Science ... Power shifts to those who invest in the future

The biggest shift in education is in its digitalisation. As it virtualises, it becomes accessible to many more audiences – to anyone with a mobile phone. It becomes more self-driven, often gamified to make it more engaging, like Kahoot for kids or Udacity for business. It then becomes collaborative, peer to peer, as it has in Finland, where more kids teach each other in a far more engaging and understandable way. In a world of ubiquitous knowledge on-demand, the change in what to learn changes too, becoming more about how to learn, how to access knowledge, and how to think.

Similarly, scientific research becomes a more collaborative effort, from sub-atomic particles to space exploration, countries collaborate ever more. Power is built on talent and who has the ability to leverage the new capabilities best. Take artificial intelligence, for example, through investment, China sees it as a primary way to assert its new influence, as do emerging nations like India, and smaller countries like the UAE and Israel.

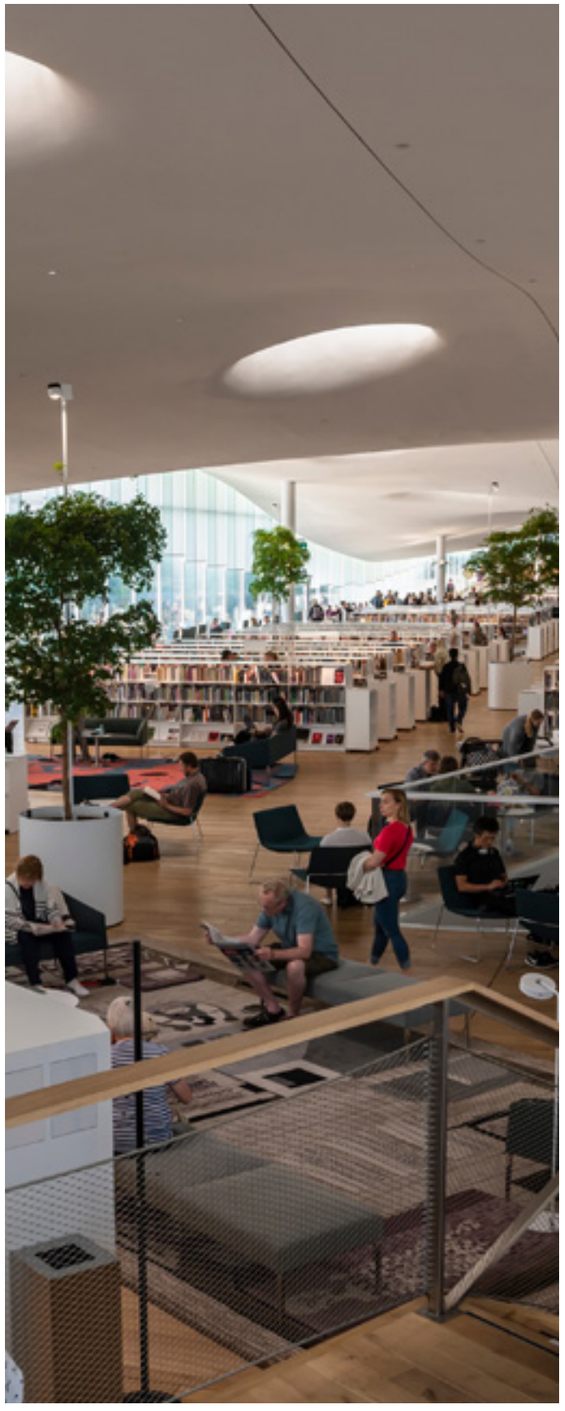


Media & Communications ... Power shifts to those we trust most

Network-based technologies transform the creation and distribution of content. Media platforms from Al Jazeera to Dalian Wanda increasingly own the rights to global content and its distribution. Companies like Xiaomi become huge investors in Hollywood movies, partly to secure its content for their platforms, and partly to shape content to its own cultures. Content also becomes user-generated, and will primarily continue to do so in the future. Instagram and Snapchat are just early starters. It is when AI starts to influence who sees content, what and when, that power really shifts. Bytedance is the world's most valuable start-up, at over $100bn, a media business that uses AI to decide what content people should see. This will drive the evolution of phenomena like fake news, and content that is created and manipulated to influence others. What and who to trust becomes a big dilemma. Power in a sense, therefore, is not to the manipulator, but to those most trusted.

Across all the drivers, the significant theme is technology and its connectedness driving a redistribution of power. Boundaries become blurred, hierarchies become meaningless, and geographies become irrelevant. People have embraced and flow with these changes, as have businesses.

The challenge for nations and their governments is to rediscover their relevance in a fast-changing world. What does it mean to be a nation? How does it best assert, or rather earn power? What are the benefits to its audiences? How does it best adapt to this change, working with and not against it, to make a positive contribution to its society?



Culture & Heritage ...
Power shifts to those who make culture relevant and accessible.

Digital media enables us to enhance or complement the real world. Look at the world of music for example. In a world of ubiquitous digital downloads, it is physical events that have been reinvented and valued most. Artists use digital to promote the physical. Add to this the ability of digital's "long tail" to embrace the rarest content means that our tastes can diversify and experiences become personalised, as is the case with LiveNation.

Similarly in sports, the world's biggest participation sport is now online gaming - where games like Fortnite can reach audiences of 2.2 billion participants. They come together in physical events too, like the Fortnite World Cup in Flushing Meadows. In a similar way 3D imaging and digital graphics can bring the history of Aztec temples and Egyptian pyramids to life, accessible to anyone, anytime. Power in a digital world goes to those who can converge digital and physical worlds in a modern, relevant way for its audiences, young and old, around the world.

Welcome to a new power generation

"Hard power" succeeded in a world of borders and controls. It is aggressive and coercive, imposed through physical size and strength. Soft power is more effective in a world of connections and cooperation. It is more engaging and influential, independent of physicality. Meta power goes further, it harnesses the new structures and dynamics of a changing world.

We have reached a tipping point. The notion of power has changed, and its effectiveness.

Nations are wasting huge amounts of public money on traditional forms of hard power such as military interventions and economic sanctions, increasingly ineffective in today's world. Instead they should refocus investments into activities that have a positive influence on other nations, communities and individuals.

Meta power goes beyond nations but can be embraced by them.

In a world of blurred boundaries and multicultural tribes, power lies in the new stories of society – the sports teams we love, the influencers we follow, the movies we watch, the people who reflect our aspirations. This new power transcends nationalism, embraceing globalism in relevant ways. It gives individual people the freedom to choose how they are influenced.

Soft power activities, such as more cultural and sporting investment, more humanitarian and environmental support, deliver a better return on their investments, enabling nations to influence their stakeholders and build positive national reputations with enlightened influence.

Perhaps the most potent source of power in today's world is change itself. Embrace the changing world, its new structures and codes, and become more powerful. Neglect it, and your power will rapidly diminish.

Change is power, because it is the story of the future, which any one of us can write, and shape to our advantage.



Professor Nicola Kleyn
Dean, Gordon Institute
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Business & Trade

The Trials of South Africa's Soft Power

Significant corporate brands influence their nation's brands and vice versa. At their best they form an important part of a nation's business and trade constellation. They shed positive light on a country brand as they delight customers, employ a nation's people, showcase national potential, and sometimes even contribute to national coffers. Lego, Emirates, Apple, Virgin, Samsung and Veuve Clicquot are cases in point. The relationship is also reciprocal. Corporate brands hope to benefit from the global association with their nation's brands.

The converse of this positive outcome is also a possibility. What I refer to as 'black hole brands' can suck light out of the system as their own damaged brand tarnishes the reputation of other associated brands. Likewise, just as the corporate brand can dilute the nation brand, how a nation deploys soft and hard power can have negative consequences for corporate brand equity. In a world where brands traverse borders, the potential negative impact of black hole brands grows in consonance with increases in a brand's footprint – whether it's a corporate or a country.

Examples of how shifts in national policy impact nation brand perceptions that in turn shape the fortunes of corporate brands, abound. "Proudly made in country X" is a corporate brand label that now needs to be selected with care. A country's behaviour may well alienate global markets. Events like Brexit, trade wars, Coronavirus, and military conflicts can all take their toll on corporate brands. The world's increasingly fractured and aggressive political climate magnifies the impact of these negative perceptions as news shows across the globe dissect the behaviour of nation states.

> Nation brand soft power in my home country of South Africa has unfortunately been diminished over the past decade by the systematic looting of state coffers.

What of the risk of company misdemeanours spilling over to nation brands? Sadly, corporate brand misconduct is increasing in frequency across geographies. For every BP oil spillage, Volkswagen emission crisis, Boeing mismanagement of safety, and Goldman Sachs 1Malaysia Development Berhad scandal, there is a plethora more. As these events move corporates closer to becoming black hole brands, national reputation and soft power is eroded. Black hole corporate brands don't only harm employees, customers, suppliers and local publics. They influence diplomatic relations and alienate international trade and investment.

While one misdemeanour may not have significant impact, repeat offences of brand misconduct by either a country or a corporate, diminish and ultimately damage the power of the brand constellation as a whole.

State capture has led to South Africa showing many signs of becoming a black hole brand. Fingers can and must be pointed at those who did nothing to protect this national brand which was a potent symbol of hope in the Mandela years. Mounting evidence shows that the culprits of state capture are not confined to domestic players.

> Isolated incidents of corporate misconduct may not affect a country's brand, but when patterns of transgression emerge, the nations who headquarter these brands need to investigate and take action, given the damage to the country's soft power. Likewise strong corporate brands whose fates are tied to potential black hole country brands need to rapidly join the dots and mitigate and manage the brand risks they face.

Global power brands including McKinsey, Bain, SAP, Deloitte, KPMG, and the now defunct Bell Pottinger have all been implicated in South African state capture. This complicity is not limited to South Africa either. McKinsey has for example been associated with billionaire Isabel dos Santos' looting of Angola. The consultancy has also been criticised for its prominent role as a key advisor to authoritarian governments in at least three other countries.





Bahar Gidwani
Co-founder and Chief
Technology Officer, CSRHub

Governance

Regulation Gives Way to Consultation

For years, the relationship between governments and the communities within them has been defined by laws and regulation. Citizens have been told not to spit on the sidewalk, smoke certain things, or break into each other's homes. Companies have been punished if they pollute, mistreat their workers, or create products that don't perform as promised.

Over the past few years, companies have sought to make this relationship more balanced. In some regions, they have earned power through campaign contributions . In others, they express views and advocate for change through advertising or through engagement in political processes by their leaders and employees.

Companies have a strong interest in encouraging countries to open their borders and cooperate with their neighbors. They are proud when the leaders of their "home" country are well respected (and well behaved!). When a business leader visits his/her "foreign" operations or customers, he/she does not want to have to apologize for a government-related gaffe, incriminating photo, or corruption investigation. The growing corporate presence at climate conferences, Davos, and other international gatherings is not just from a desire to drink, gossip, and hang out with celebrities. Business leaders want to be associated with good governments and strong Governance practices.

Companies also naturally tend to move managers and employees from one locale to another. If not handled well, these transfers can create stress for both the employees, the company's culture and the citizens of the receiving country. For instance, if a company employee is married to a same sex partner, should that employee be allowed to transfer to an office in a country that does not allow gay marriage? If the employee and his/her spouse cannot go to certain countries, does this reduce the employee's opportunity for advancement? In the same vein, a business does not want its employees kidnapped, robbed, or assaulted. Companies can encase their employees in guarded compounds and transport them in chauffeured cars. But they would prefer to encourage governments to adopt policies that ensure personal liberty and safety for all citizens.



Some governments seek to exclude outside influences—either to prevent intrusion of beliefs and practices they disagree with or to encourage the development of skills within their own populace. However, it has become almost impossible for a government to shut out foreign signals. Informal work practices (e.g., the "gig economy"), cheap travel costs, students who spend a semester or two abroad, internet videos (and chat applications), all contribute to increased awareness of how other countries are governed and how other people behave.

Groups such as the World Council for Sustainable Business Development (WCSBD), Chief Executives for Corporate Purpose (CECP), and the US Business Roundtable are encouraging companies to engage and cooperate with governments, rather than confront them. Companies are taking a similar path towards working with other stakeholders. They are saying that they are responsible not only to their shareholders, but also to their employees, their customers, their suppliers, and the communities they operate in. In turn, programs such as the UK's Modern Slavery Act, California's Transparency in Supply Chains Act, and the EU's Markets in Financial Instruments Directive (MFID) are enlisting companies' help to change society. Other stakeholders in society—consumers, not-for-profits, and the media—seem willing to do their share to push this trend forward.

Government can increase their soft power by leveraging the goals, aspirations, and beliefs of their corporate citizens. With proper consultation and direction, companies will help government communicate new ideas to citizens, not for profits, and other components of civil society. Companies are good at marketing! They know how to translate a government's message into terms that the rest of society can understand and support.



Paul Brummell CMG
Head of Soft Power and
External Affairs, Foreign
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International Relations

The Role of Soft Power in Foreign Policy

According to Joseph Nye, who coined the term, "the soft power of a country rests primarily on three resources: its culture, its political values, and its foreign policies." Under this depiction, Foreign Ministries and their diplomatic networks are both producers and users of soft power.

The soft power deriving from a country's foreign policy is not just about development assistance and values-driven campaigns, it is also about foreign policy decisions taken as a whole. This is about working with others across the international community to respond to crises and challenges when they occur, and using in a positive and engaged way our memberships of international organisations, including our Permanent Membership of the UN Security Council.

They are producers in relation to that part of soft power deriving from a country's foreign policies. Soft power is defined by Nye as "the ability to get what you want through attraction, rather than coercion or payments." How a country behaves internationally is an important part of that attractiveness.

Physical presence is an important starting point: soft power is enhanced through a diplomatic network reaching all parts of the globe. The biggest expansion of the UK's diplomatic network for a generation, including the opening of twelve new posts worldwide, will help to maximise our soft power. But soft power is not just about being there.

An attractive foreign policy involves engagement in helping to address the major issues facing our planet. The soft power strength of the United Kingdom has been bolstered by a willingness to work with the international community in illuminating and tackling a series of global challenges: sexual violence in conflict; the illegal wildlife trade; the importance of twelve years of quality education for girls; the promotion of media freedom. The hosting in Glasgow this November of the 26th Session of the Conference of the Parties to the UN Framework Convention on Climate Change is a mark of the UK government's determination to be at the heart of efforts to tackle perhaps the greatest threat to our planet.

Development assistance is an important part of the attractiveness of the UK's international behaviour. This derives not only from the fact that the UK is one of the few major economies to meet the OECD's target of spending 0.7% of our national income on ODA. But also from the way in which we have developed a reputation as a global champion for aid spending, humanitarian relief, environmental protection, and efforts to meet the sustainable development goals.

Government largely controls the foreign policy element of soft power. But the other resources from which soft power derives are more independent of government. In deploying these resources, Foreign Ministries are users rather than producers of soft power. As Tom Fletcher, former British Ambassador to Lebanon, put it: "when I was in Beirut, we never missed the chance to fly the largest flag we could find over a Bond car, premiership footballer, or visiting celeb. This wasn't because we were star-struck (though perhaps we were a bit) – it gave us the best possible platform for our message about Britain's global role."

As both a producer and user, soft power is at the heart of the work of Ministries of Foreign Affairs.

The GREAT Britain campaign showcases British soft power strengths to encourage people to visit, do business, invest, and study in the UK. Diplomatic missions promote British values, for example in supporting Pride events in countries where LGBTQ+ communities face precarious existences.



The showcasing of our culture and values does not though take place in a vacuum. Soft power is about attractiveness, and attractiveness depends on how it is perceived by the recipient. In a recent report, the British Council has highlighted the value of trust in International Relations. The most effective deployment of soft power by diplomatic missions comes when it involves an understanding and appreciation of the strengths and aspirations of the host country, a search for common ground and identification of fertile areas for collaboration.

And while much cultural soft power is independent of government, this does not mean that government cannot support it. The BBC is a case in point: an organisation whose great soft power as an international broadcaster owes much to the fact that audiences around the world are clear about its editorial independence from government. Respecting that independence, the Foreign and Commonwealth Office has funded the BBC World 2020 programme, supporting twelve new language services of the BBC World Service and bolstering its capacity to deliver award-winning investigative programmes like Africa Eye. This support helped the BBC to increase its international reach by close to 50 million people last year. The Chevening Scholarships scheme, which has been running for 36 years, brings future leaders and change-makers from around the world to UK universities for a Masters programme fully funded by the UK government. And the global network of the British Council helps to build cultural and educational partnerships worldwide, drawing from our soft power.



Amish Tripathi
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Culture & Heritage

The Spread of Indian Soft Power

Both established theory and received wisdom seem to agree that Soft Power propagation tends to follow Hard Power conquest. Greco-Roman culture enveloped most of Europe on the heels of Roman legionaries. Arab conquest of the Middle East and North Africa preceded the dominance of Arabic language, culture and way of life across the region. The cultural dominance of the Anglosphere across the modern-world is a remnant of the humongous power exercised by the British empire, which was built on warfare. However, Hard Power does not necessarily lead to Soft Power. Mongols established one of the largest empires in human history, yet the Soft Power of Mongolia, from the Mongolian language to Tengri religion to native Mongolian culture is hardly visible outside Mongolia.

It would seem a safe conclusion, then, that Soft Power is most often built on the back of Hard Power conquest. And equally, that Hard Power is not a guarantee for Soft Power to automatically emerge. Hard Power appears to be a "necessary but not sufficient" condition, for Soft Power.

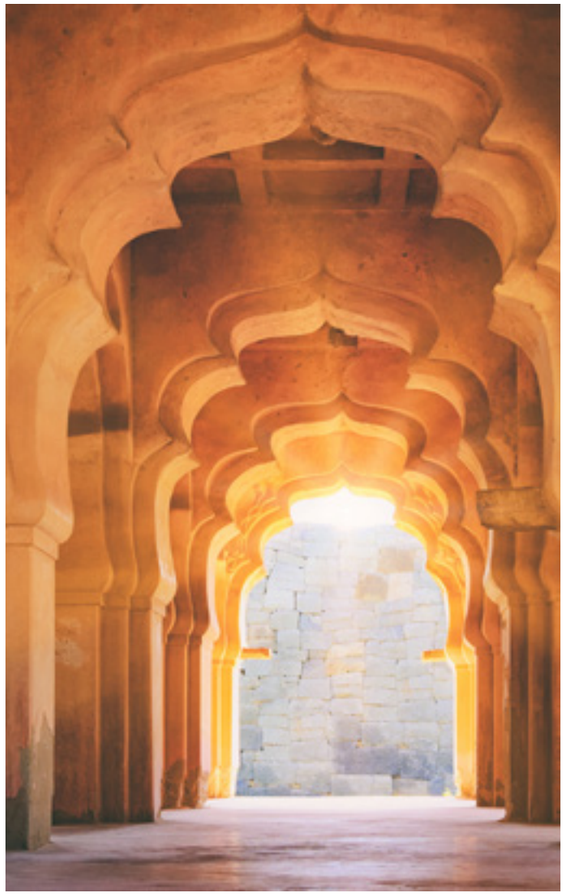
I'd like to propose some theories on why Indian soft-power spread far & wide in the 1st millennium, despite almost no hard power projection abroad (besides the brief conquest of South-East Asia by Indian emperor Rajendra Chola in the 11th Century). They could serve as lessons, not just for Indians today, but for others as well.

Domestic Strength

The heart of global Soft Power lies in domestic strength. A nation must be genuinely successful to be worthy of emulation by other countries. If it lacks confidence, is riven with infighting, or is being beaten on the world-stage by others, it doesn't either inspire or attract. This started happening to India by the beginning of the 2nd millennium CE, and as its domestic strength waned, its Soft Power abroad emaciated as well. This is happening to some Western powers today.

Economic Success

According to British Economic Historian, Angus Maddison, India accounted for approximately 30% of Global GDP through the 1st millennium CE. It was, by far, the richest land on earth at the time. This was of course based on India's massive population (which some historians suggest was a result of better medical and hygiene standards, relative to the rest of the world at the time). India, like many other countries



in the world, was a largely agrarian economy during that period. But trade played a huge role as well. Historian Sanjeev Sanyal has written about the tremendous importance of the Indian Ocean trade routes, as compared to the more fabled land-based Silk Route. Ships have much greater carrying capacity than camels/oxen. Also, the Indian Ocean is unique in that the winds change direction, every year, like clockwork, because of the Monsoon system. This made a round-trip, annual-trade-route possible. In the early 1st millennium CE, Roman historian Pliny rued Roman addiction to Indian goods and the massive trade deficit, resulting in the outflow of Roman gold to India. With the invasions of the 2nd millennium CE, and some superstitions seeping into Indian culture about overseas travel, trading declined relatively. Agriculture also suffered under the onslaught and disruption caused by foreign marauders. India slowly lost its wealth dominance, and hence, became less influential. Western powers must ponder on this as their global trading confidence and domestic production reduces.

Liberal & Open-minded spirit

India is home to one of the oldest Jewish communities in the world, who sought refuge in the 1st/2nd Century CE after their temple in Jerusalem was destroyed by the Romans. Zoroastrian Persians found a home in India when they fled Arab oppression in the 7th century. We imported some royal dynasties as well on occasion (when the reigning dynasty did not have legal heirs). Women occupied a very high status in ancient India, when compared to most other ancient cultures. LGBTQ+ lifestyles were not criminalized. The founder of one of the greatest Indian ruling dynasties, the Chandravanshis (Lord Krishna was a Chandravanshi), was a transgender called Ila. We were a practical and pragmatic people, which meant that we were liberal because it was the smart thing to do, not because we were "virtue-signaling" our moral superiority. And we benefited from it.

Knowledge & Science

As foreign travelers have recorded, ancient Indians were most obsessed with knowledge. We hosted the oldest and greatest universities in the ancient world: Nalanda, Takshashila, Sharada Peeth, to name just a few. Students flocked to these universities from all over the planet. Numerous schools and temples across the subcontinent met the need for primary schooling and feeding of the poor. There were great innovations in Sciences, Mathematics, Metallurgy, Navigation, Agriculture among other areas. Much of it was documented as well. Despite the massive destruction



of almost all ancient Indian universities in the invasions of the 2nd millennium CE, at least 3 million hand-written Sanskrit (India's ancient language) manuscripts survive to this day, according to the National Manuscript Mission. This is more than that of the rest of the ancient world combined. The modern West credits knowledge of Algorithms to the Arab scholar Al-Khwarizmi. But Al-Khwarizmi himself was clear about the source of large portions of his knowledge; he named his book "Kitab al hisab al Hindi"(Book of Hindu Numerals/ Maths). The modern West credits Fibonacci, (a.k.a Leonardo Bonacci) with the Fibonacci series, but Fibonacci himself, in his book, Liber Abaci, called it the "Indian Series". Having said that, from the 13th-14th century, it is difficult to recall any new epoch-making knowledge innovation that Indians came up with. We simply stopped being productive in the field of knowledge, outside of a few regions like Kerala, where the Kerala school of Mathematics flourished in the 16th century.

India fell so drastically over the last eight hundred years, that many modern Indians are shocked when they travel abroad and see remnants of our ancient culture represented in foreign lands. For we have forgotten too much. Modern Indians need to understand the reasons for the success of our ancestors and try to revive that spirit. And perhaps, modern Western powers can also learn from how ancient India lost its mojo and attempt to not repeat those mistakes. The story of ancient India has many lessons for the modern world, in as much as it has lessons for modern Indians on what they can be again.

Warrior spirit

Today, India is largely viewed as a fundamentally pacifist and non-violent culture. But this is often a backward projection of Mahatma Gandhi's aura into ancient history. Yes, it is true that India has ancient pacifist and non-violent traditions. It is also true that almost never did Indians march out of the Indian subcontinent to conquer foreign lands. But it is equally true that Indians did not lack warrior spirit, and there is documented evidence of massive wars between Indian kingdoms & empires. It is also true that until the beginning of the 2nd Millennium CE, India regularly beat back foreign invaders. The Huns destroyed much of ancient Europe but were repeatedly pushed back from India. 'Alexander the Great' could not make much of an entry into the subcontinent, and he didn't even battle the heartland Indian empire of the time; he was fended off by the relatively smaller kingdoms at the borders. So, India did possess Hard Power. But it was always defensive Hard Power, never offensive. Military strength was used to defend the motherland, but rarely to conquer foreign lands.



Lord Sebastian Coe
Chairman of CSM Sport and Entertainment, President of World Athletics

Culture & Heritage

The Power of Sport in Global Diplomacy

By athlete performance, late last Summer we enjoyed the most successful World Athletics Championship since its inception in 1983. And we have witnessed a global TV audience that, for the most part, outstrips our last three World Championships. Actually, those of us who have followed the sport closely over the years instinctively thought as much while the competition unfurled and before the number crunchers got to work, but it was nice to have it confirmed all the same.

Yes, there were too many empty seats at the beginning and there was an inevitable focus on this from the media, who used it as a crowbar for the charge that in a country that really got athletics, the stadium should have been stuffed to the gunwales from the off. Which of course, it rarely is.

That wasn't the only charge that can largely be countered by the quarter century of Qatar staging athletics events including a World Indoor Championships, a solid Diamond League launch pad for the season over the last decade, and the multi-million dollar investment in the hard and soft infrastructure which supports its domestic programmes and is made available for a large chunk of the world's athletes. How many countries today can say they have a national sport day where every school child participates, some of it competitive, some participatory?

No, the real difficulty in the press conferences I was cross-examined in, and the scores of interviews I gave, was more visceral and basic. The opening and closing press conferences for the championship were mired in tiresomely predictable questions. Asked by those who seemed a little thin on historical perspective.

As I flew home, I raked through the embers of those conferences and interviews, questioning the reason why these observations should have surfaced with such vehemence. Was I missing something? The case for the prosecution was clear, if a tad scattergun.

So let me attempt one for the defence and a case for the continued use of sport as one of the most effective soft powers. We are all hewn from a suffusion of family, geography, education and experience, which in my case included an international athletics career of fifteen years and thirty years beyond that in parliamentary and sporting politics. I suppose it is also inevitable that my views about the overwhelmingly virtuous power of sport beyond the field of play is born from that mix.

Forty years ago, on the eve of the Moscow Olympic Games, my youngest sister left the house for school and moments later reappeared in the kitchen. Overnight, graffiti had been splashed on the garage door. On inspection, it was a swastika. This was probably my first direct exposure to the collision of politics and sport.



I was at that time, noisily outspoken on British government policy, inspired by their counterparts in the USA to boycott the Moscow Games in the aftermath of the invasion of Afghanistan by the Soviet Union. The cowards, under the protection of nightfall, that vandalised our door assumed my provenance was Jewish – it didn't matter much but actually it was Indian. My views on a sporting event was taking place in a communist country with a very questionable record on human rights was enough.

Days later, my father was called into the foreign office to see a young Minister of State, Douglas Hurd (eventually to become Foreign Secretary) who, in essence, encouraged him to quieten his son. Anyone who knew my father will need no verbatim account of that exchange! Months later, I went to Moscow. In no way was this a seal of approval for their domestic or foreign policy, but it was my unflinching belief that sport has the ability, over the long haul, to flick the social, political, and cultural dial in a way that few, if any, other world actors on the global stage can.

When all was said and done, those countries that refused to go to Moscow achieved nothing other than destroying



Afro-Asian games in Hyderabad in India in 2004, which I attended, and at a time when the host nation's relationship with neighbouring Pakistan was so bad that they were virtually on a war footing, two sets of foreign ministers agreed that the reintroduction of a Test series between the two cricket-adoring nations might ease cross border tensions. It did.

I could continue to furnish so many examples of sport playing a central role in social change. From the Berlin Games of Owens, the London Games in 1948 when Dutch athlete, the incomparable Fanny Blankers Koen dismantled the nostrum that women weren't hard-wired mentally or physically to be taken seriously in sport. Or the black power salute of John Carlos and Tommy Smith in 1968 that helped drive change for black empowerment. And athletics doing much and more than any sport to nudge these changes.

But it does get closer to providing solutions to many of society's intractable and politically entrenched pathologies. And that is not to say that we can be oblivious to the social and political landscape of those countries to which we take our events, or without censure when they fall short of the universal and sporting values for which we stand.

Our global sporting relationships allow us to shine a spotlight on issues that most jobbing politicians and touring ministers in search of trade deals, or the management of containment, will pragmatically shy away from.

I know my conversations with political leaderships are often more acute and possibly uncomfortable than those they have with my counterparts in other walks of business and life.

If some of those agencies vilifying sport for expanding its global footprint into countries that don't always meet with our liberal democratic mores, realise they could join forces with sport to become collaborators, rather than competitors, we could achieve much more. If we predicate our sporting relationships on political systems and their fault lines, international sport will wither on the vine. I have never yet seen sport inhibit the social or political advancement in any country it has plied its trade. In fact, quite the opposite.

So to all those doubters, please give sport a chance. It rarely lets us down. And if you are not prepared to, please don't lend your names to organisations that promote sport and its good causes, if when push comes to shove, you are not prepared for large parts of the world to really share in that concept.

Sport could and should be asked to play a more hands-on role. It is the most potent social worker and the deftest of soft international power out there.

Sport, like every other sector, has to grasp the realities of the 21st century, not those of the 19th. I only hope when your time comes to host these events, the world doesn't pick holes in your own national fragilities – we all have them – and conclude that you should be barred from hosting them.

I will continue to advocate for our events to be held around the world. When 86 countries set a national record and 76 countries made it to a final or top 8 finish spot, it is the right and obvious thing to do.

But there is one other reason I have not fully touched on in this blog and that is the role sport plays in the health of our people.

Global TV audiences excite and sometimes motivate people, but hosting an event can lead to real and tangible goals by cities and countries to embrace sport and encourage participation. It may take time but it is time I believe is worth spending.

I grew up on the shoulders of sport giants, a school system that embraced sport, and parents who encouraged us to be active. Over the last three decades, I have watched this wither and die in some countries and I worry for the future of our children's children if their parents have not been exposed to sport in their early years.

How can we ensure a healthy society in the future if our day-to-day role models have never had the opportunity to participate in sport and reap the benefits? If hosting our events provides a focus for cities and countries to tackle inactivity. If our athletes continue to perform superbly. And if our sport is entertaining enough to encourage an enviable and growing global audience, then we must be doing something right.





Professor Richard Sambrook
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Media & Communication

The Importance of Media Influence in the Age of Information

The battle for global influence through media soft power is escalating in the digital age, but its character has changed radically from the days of short wave radio broadcasts across the oceans.

The American academic, Joseph Nye, who coined the term "soft power" defined it like this: "Power is essentially the ability to get other people to do what you want and there are three ways you can do this. You can coerce people ("the stick"), you can offer incentives ("the carrot") or you can get others to want the same outcome as you do by attracting them."

That last option, which he christened soft power, was the role of international broadcasting through much of the twentieth century. Twenty years ago, Kofi Annan, then UN Secretary General, called the BBC World Service "probably Britain's greatest gift to the world'. It didn't seem an extravagant verdict at the end of a century where global broadcasting had contributed to international development, the end of the cold war between east and west, and a greater global awareness for its audiences.



Today the landscape is very different. We now have a glut of state backed TV channels,



including Press TV from Iran, Al Jazeera from Qatar, China's huge investment in Xinhua and CGTV and of course Russia Today (RT) each reflecting the values and interests of their funders. Alongside these, competing for attention, are multiple social media channels including Facebook, Twitter, WeChat in China, VKontakte in Russia, and many more offering entertainment, information, and social interaction. Influence today is less top-down, with trust in both governments and media declining and becoming more peer to peer in a networked society. As western countries, post cold war, have cut funding of international media, Russia, China and others have invested to expand their global influence (as reflected in the Global Soft Power Index with the USA and UK still retaining top places for influence, but fallen in terms of trust, and with the rise of China for influence).

> The secret of the BBC's success, above other countries broadcasts, was a reputation for accuracy and clear political independence which meant people trusted what it said – more than they could trust their own communist governments for example – and a showcase for western values and culture.

Not of all these new channels hope to set positive examples. RT's slogan "Question More" of course implies "Trust Less" in an attempt to subvert western orthodoxy and Russia has invested heavily in online trolling and electoral interference – doing what Russia has always done, but catching the wave of new technology and opportunity.

In response, the BBC, for example, has continued to expand its global role. Across radio, TV and online it now reaches more than 400 million people each week. It has launched 12 new services in the following languages: Afaan Oromo, Amharic, Gujarati, Igbo, Korean, Marathi, Pidgin, Punjabi, Serbian, Telugu, Tigrinya, and Yoruba and enhanced programming in English, Arabic and Russian. This means the World Service is available in 42 languages including English. It has innovated with mobile services, chat apps, social only pop-up services and podcasts. And it has launched global media literacy programmes to help audiences better understand what they are consuming.

This escalating struggle for attention reflects the importance of media influence in the information age. From security, to economics and trade to climate change, national interests are directly affected by public perception of international events and responses to them. The biggest challenge - in the face of growing public scepticism, fake news and data exploitation - is trust. How is that built? Brand still matters hugely – but a commitment to accuracy, independence, and transparency is crucial.



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Education & Science

The Role of Education and Science in Supporting a Nation's Soft Power

The concept of soft power emerged as early as the 1980s, while nations have been practising it for centuries. Nye's presumption of soft power is persuading others to want what you want, but the extent to which this is relevant and effective is judged by the target audiences and their formed perceptions and responses. In the age of information and widespread, easily accessible communication channels, soft power is becoming more effective than ever in influencing International Relations. The increased dependence on soft power is a trend led by globalisation in a digitally connected sphere, where public opinions are shaped and government policies are influenced.

Higher education institutions are inherently eager to seek knowledge and innovation across borders. They explore the connected world as they develop their online courses and offer some of them for free, such as the University of Edinburgh, the Open University, and several American Universities, e.g. Stanford University and Michigan State University.

Scholarships and fellowships, such as the British Chevening, Fulbright, and the American Scholarship, are funded by governments aiming to create influential allies around the world. International students are important cultural ambassadors for both their host country and home country. Universities that open campuses abroad, such as the American University in the United Arab Emirates, Lebanon, and Egypt contribute to educating elites, future influential leaders, and personalities.

> Technology is the most powerful tool of soft power today. The connectivity technology creates, exceeded any expectations. Soft power gains a whole new meaning on the internet. The new connected world with all its social platforms bring people closer, increasing familiarity with other's values and cultures; and enable them to collaborate and co-create contents, knowledge, and new realities.

H.E. Rania Al Mashat, Egypt's Minister of International Cooperation and Egypt's Governor at the World Bank; and Nevine Loutfy, the first Female CEO and Managing Director of an Islamic Bank in the Arab world – Abu Dhabi Islamic Bank, are a couple of examples of many. As such, alumni, student societies and social clubs, sports, and athletic teams are great sources of soft power in the long term.



Universities are centres for shaping not only the thoughts of the future elites of the world but life itself. The curious minds stimulated by discovery, progress, and innovation across the globe are united in research and scientific advancements. Higher education funding bodies offer international research funds that encourage collaborations to create knowledge and relieve hardship across the world, such as shortage of water, food, health, and environmental enquires.

> Funding international research by supranational institutions such as the United Nations, the European Commission, and the World Bank, enhances the role of research and science as a soft power that brings countries together through collaborations.

Countries also offer international funding schemes to enhance their collaborations and access to knowledge, such as International Foundation for Science (IFS) and the Global Challenges Research Fund (GCRF) in the UK, U.S. Agency for International Development (USAID), NSF Office of International Science and Engineering, and many more.

UNESCO's data of research and development funding across the world shows that the highest number of researchers is in North America and Western Europe, followed by East Asia and the Pacific; whereas the highest government funding as a percentage of the GDP is in the Republic of Korea and Israel, followed by Japan, Finland, and Switzerland. This peculiar fact has two facets: first, it reflects the role research plays in hard power policies, such as the role it played in World War One and Two; secondly, it may reflect a shift into soft power through research and science advancements. Research collaborations may face challenges due to a conflict in interest such as collaborations on space projects among competing nations, copyrights and patents of research outcomes, share of know-how, and information security.

The benefits of research collaborations outweigh the challenges. University heritage and scientific achievements forms its brand equity that can attract learners, researchers, and finances, and enhance a country's soft power of persuasion. The promotion of a nation's goals is reinforced when there is a better understanding and appreciation of the country's soft power. It is important, though, not to understand and implement soft power from a pure ethnocentric perspective, to achieve attractiveness and influence international policies, without careful consideration of the other nations.



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People & Values

Bridging and Building Community Cohesion Through Faith and Soft Power

One of the biggest challenges we face in the 21st century, has been the resurgence of bigotry, far-right populism, racism, and hate crimes in of our communities. The question of national security, identity politics, inclusivity, and belonging in post-Brexit Britain is at a critical point in our history. As we enter and embrace a new decade, the world continues to face rapid challenges and changes across political, economic, and social landscapes.

In an age of thriving globalisation and technological innovation, we have also seen the digitalisation and democratisation of diplomatic affairs at an unprecedented level with expansive engagement and contribution from non-state actors.

Perhaps it is time for us to (re)consider community, art, sport, cultural and educational organisations and institutions as not only key facilitators in strengthening community ties, cultural relations and exchange, but also recognise them as innovators and producers of soft power. A theory coined by Joseph Nye, soft power aims to persuade 'the other' through non-coercive means. This is a strategy deployed in foreign policies across the globe by countless nations in a bid to present 'the nation' in a favourable image amongst other foreign governments and foreign nationals through Public Diplomacy. The arena in which Public Diplomacy works to reach the hearts and minds of citizens must consist of the following key components: time, space, audience and medium of communication. An awareness of these key features is pertinent as it maps out the scope and ability to perceive the world through interdisciplinary means and highlight the art of invitation within which lies the tangible and practical understanding of attraction in soft power.

> The need to advance practices of bridging between different communities in an age of 'othering' has never been more apparent. The world has never been more interconnected, but how cohesive is the connection between our different communities?

Chevening Scholarships for foreign students to study at world-leading universities in the UK, fans travelling across the globe to watch a live Premier League football match, tourists attending a cultural or art festival, liveability, friendliness, commerce and trade and reputation in scientific and technological research. All of the aforementioned are examples of how a country's soft power invites the necessary form of exchange and engagement.

Another example of this exchange and 'Cultural and Faith Diplomacy' is the work of Ramadan Tent Project, a non-profit organisation with a mission of bringing communities together to better understand each other.

Ramadan is the ninth and holiest month of the Islamic calendar, where millions of Muslims across the globe observe a 30-day fast from food and drink during sunlight hours (dawn to dusk). During the month, families, friends and neighbours join in a communal gathering for the meal, 'iftar', to break their fast each day.

The flagship initiative of Ramadan Tent Project is the UK's largest community event in Ramadan, 'Open Iftar'. Open Iftar invites people of all backgrounds, including faith and non-faith groups to experience Ramadan in the UK with foods and cuisines from around the globe, including hosting speakers from a wide range of backgrounds who speak about local, social, political, cultural, and religious issues. Over 100,000 people have been hosted in over 10 cities and 4 continents, an intriguing resemblance to diplomatic missions across the globe and their Public Diplomacy efforts.

Ramadan Tent Project has been at the sharp end of both witnessing and helping to bridge the communications gap between Britain's Muslims and wider communities. Almost half of UK adults think Islam is incompatible with British values and more than two thirds of the





public agreed that 'Brits have a negative perception of Islam'. This is despite the fact that 93% of Muslims expressed that they belonged to Britain – more than any other faith group. As a result, the opportunity and scope to develop greater understanding and influence positive behavioural changes at 'Open Iftar' is a unique moment of interaction and engagement, showcasing an extensive example of the intersection of faith and grassroots soft power. A scene powerfully illustrated through the example of connecting and convening an Egyptian student on a Chevening Scholarship, and a group of Japanese tourists over food at an Open Iftar event at Trafalgar Square during the month of Ramadan.

A snapshot of survey results found that 98% of guests agreed that Open Iftar is a model for achieving better understanding and over half of the guests expressed that their perception of Islam and Muslims improved positively, especially for students and tourists who are visiting, studying, working or living alone in the UK. Open Iftar is an opportunity to meet new people and provide a home away from home experience which further strengthens and emboldens community ties, whilst breaking down barriers, dispelling myths, misconceptions and softening hearts and minds.

Community organisations and grassroots initiatives like Ramadan Tent Project and Open Iftar, help to create dialogue, raise awareness, increase community harmony and build bridges as a means of 'winning hearts and minds' by turning strangers into friends.

It is important to note that in order for agents of soft power to build true community alliances and understanding, there must be a focused and integrated strategy to create safe and open spaces of interaction with emphasis on building trust and reciprocity between one another. Our conceptual understanding of the modern day 'diplomat' or 'ambassador' has evolved to encompass the private citizen to communicate, mediate, negotiate, represent an organisation, community group, faith, football club, or like many states – a nation brand.

05
Appendices

Global Soft Power Index

The full breakdown of results per nation

Rank	Nation	Region	Index Score	Familiarity	Influence	Reputation
1	United States	North America	**67.1**	**8.6**	**7.7**	7.1
2	Germany	Europe	**61.9**	7.9	6.0	7.4
3	United Kingdom	Europe	**61.8**	8.2	6.3	7.3
4	Japan	Asia	**60.2**	7.6	5.8	7.5
5	China	Asia	**58.7**	7.6	7.1	6.5
6	France	Europe	**58.5**	8.1	5.8	7.1
7	Canada	North America	**54.5**	7.4	5.0	7.5
8	Switzerland	Europe	**54.5**	6.9	4.7	**7.6**
9	Sweden	Europe	**51.9**	6.4	4.2	7.4
10	Russia	Europe	**51.0**	7.2	5.7	6.3
11	Italy	Europe	**49.3**	7.6	4.8	6.8
12	Netherlands	Europe	**48.9**	6.3	4.2	7.1
13	Australia	Oceania	**48.8**	7.0	4.3	7.2
14	South Korea	Asia	**48.3**	6.7	4.5	6.7
15	Denmark	Europe	**47.7**	5.9	3.8	7.2
16	Spain	Europe	**47.6**	7.5	4.7	6.9
17	Norway	Europe	**47.3**	5.8	3.8	7.3
18	United Arab Emirates	Middle East & North Africa	**45.9**	5.8	4.7	6.6
19	Belgium	Europe	**45.5**	6.2	4.0	6.9
20	Singapore	Asia	**44.8**	6.1	3.9	6.8
21	Finland	Europe	**44.8**	5.5	3.5	7.2
22	New Zealand	Oceania	**43.5**	5.9	3.5	7.0
23	Austria	Europe	**43.5**	5.9	3.6	7.0
24	Ireland	Europe	**43.0**	5.8	3.6	6.7
25	Israel	Middle East & North Africa	**42.6**	6.0	4.4	5.7
26	Saudi Arabia	Middle East & North Africa	**41.9**	5.8	4.8	5.8
27	India	Asia	**41.6**	6.8	4.5	6.0
28	Portugal	Europe	**40.6**	6.2	3.7	6.6
29	Brazil	Latin America & Caribbean	**39.4**	6.9	4.0	6.1
30	Turkey	Europe	**39.4**	6.2	4.2	5.7

Rank	Nation	Business & Trade	Governance	International Relations	Culture & Heritage	Media & Communication	Education & Science	People & Values	Medals *General Public*	Medals *Specialist Audiences*
1	United States	6.6	4.3	6.2	5.5	**5.2**	**6.6**	3.9	**10**	**2**
2	Germany	6.8	5.5	**6.4**	5.4	5.0	5.9	4.2	**11**	**1**
3	United Kingdom	5.8	4.7	6.3	6.0	5.1	5.5	4.5	**5**	**3**
4	Japan	**6.9**	5.4	5.1	5.7	4.1	6.5	4.7	**8**	**1**
5	China	6.6	3.4	5.4	5.2	2.9	5.1	2.8	**2**	**1**
6	France	5.8	4.4	5.8	**6.4**	4.7	4.2	4.3	**4**	**2**
7	Canada	5.7	5.2	4.9	4.7	4.6	4.3	**5.1**	**13**	-
8	Switzerland	6.7	**5.6**	5.0	4.8	4.5	4.8	4.8	**10**	**2**
9	Sweden	6.2	5.3	4.6	5.1	4.3	5.0	5.0	**11**	**1**
10	Russia	4.0	3.1	5.6	4.9	3.0	4.1	3.5	**2**	-
11	Italy	4.9	3.2	3.7	6.2	3.2	3.2	4.6	**4**	**1**
12	Netherlands	5.6	4.9	4.2	4.7	4.4	4.0	4.6	-	-
13	Australia	5.4	4.8	3.8	4.7	3.7	3.6	4.8	**1**	-
14	South Korea	5.8	3.8	3.6	4.3	3.5	4.6	4.2	-	-
15	Denmark	5.6	5.2	3.9	4.8	3.9	4.2	4.9	-	-
16	Spain	4.5	2.9	3.4	5.8	3.3	2.6	4.7	**2**	-
17	Norway	5.3	5.1	4.0	4.5	4.1	4.4	4.7	**1**	**1**
18	United Arab Emirates	5.5	3.1	4.7	3.9	3.2	3.0	3.1	-	-
19	Belgium	5.1	4.4	3.9	4.3	3.6	3.2	4.4	-	-
20	Singapore	5.4	3.9	3.3	3.9	3.2	4.3	3.9	**1**	-
21	Finland	4.9	5.1	3.7	4.1	3.6	4.5	4.6	-	-
22	New Zealand	4.6	4.7	3.3	4.5	3.5	3.3	4.9	-	-
23	Austria	4.7	4.4	3.5	4.7	3.4	3.3	3.9	-	-
24	Ireland	4.5	4.1	3.3	4.8	3.5	3.1	4.7	-	-
25	Israel	3.8	2.8	4.2	3.9	2.7	4.1	2.9	-	-
26	Saudi Arabia	4.2	2.5	4.3	3.2	2.5	2.5	2.8	-	-
27	India	3.3	2.3	2.9	4.6	2.2	3.0	3.2	-	-
28	Portugal	3.5	3.5	2.9	5.0	2.8	2.2	4.4	-	-
29	Brazil	3.1	2.1	2.3	5.3	2.2	2.1	3.7	**2**	-
30	Turkey	3.4	1.9	3.3	4.4	2.4	2.1	3.2	-	-

The full breakdown of results per nation

Rank	Nation	Region	Index Score	Familiarity	Influence	Reputation
31	Qatar	Middle East & North Africa	**38.5**	5.1	3.9	6.1
32	Thailand	Asia	**37.6**	6.5	3.6	6.0
33	Malaysia	Asia	**37.4**	5.8	3.5	6.2
34	Greece	Europe	**36.6**	6.4	3.5	6.0
35	Poland	Europe	**36.6**	5.6	3.4	6.2
36	South Africa	Sub-Saharan Africa	**36.4**	5.9	3.8	5.8
37	Mexico	Latin America & Caribbean	**35.6**	6.3	3.6	5.8
38	Egypt	Middle East & North Africa	**34.8**	6.5	3.6	5.7
39	Czech Republic	Europe	**34.4**	4.9	3.1	6.4
40	Argentina	Latin America & Caribbean	**33.9**	6.0	3.3	5.9
41	Indonesia	Asia	**33.4**	5.4	3.2	5.8
42	Philippines	Asia	**32.5**	5.3	3.1	5.6
43	Croatia	Europe	**32.4**	4.7	2.8	6.2
44	Chile	Latin America & Caribbean	**32.2**	4.7	3.0	5.9
45	Hungary	Europe	**31.9**	4.8	3.0	5.9
46	Ukraine	Europe	**31.7**	5.1	3.3	5.5
47	Estonia	Europe	**31.7**	3.7	2.6	6.3
48	Iran	Middle East & North Africa	**31.5**	5.5	3.6	4.7
49	Colombia	Latin America & Caribbean	**31.5**	5.0	3.0	5.5
50	Vietnam	Asia	**31.3**	5.5	3.1	5.6
51	Peru	Latin America & Caribbean	**30.8**	4.6	2.8	5.9
52	Romania	Europe	**30.4**	4.6	2.9	5.7
53	Pakistan	Asia	**29.7**	5.5	3.2	4.9
54	Algeria	Middle East & North Africa	**29.0**	4.2	2.8	5.5
55	Venezuela	Latin America & Caribbean	**28.8**	5.1	3.2	4.8
56	Nigeria	Sub-Saharan Africa	**28.8**	4.5	3.0	5.1
57	Bangladesh	Asia	**28.5**	4.7	2.6	5.3
58	Kazakhstan	Asia	**27.7**	3.7	2.6	5.4
59	Iraq	Middle East & North Africa	**27.7**	5.9	3.3	4.4
60	Myanmar	Asia	**27.5**	4.4	2.6	5.1

Rank	Nation	Business & Trade	Governance	International Relations	Culture & Heritage	Media & Communication	Education & Science	People & Values	Medals *General Public*	Medals *Specialist Audiences*
31	Qatar	4.4	2.6	3.6	3.1	2.6	2.5	2.8	-	-
32	Thailand	3.6	2.2	2.3	4.5	2.1	1.9	4.0	-	-
33	Malaysia	4.1	2.5	2.7	3.6	2.4	2.4	3.7	-	-
34	Greece	2.5	2.3	2.1	5.1	2.1	1.9	3.9	**1**	-
35	Poland	3.4	2.9	2.6	3.6	2.5	2.2	3.7	-	-
36	South Africa	3.0	2.2	2.9	3.7	2.3	1.8	3.0	-	-
37	Mexico	2.8	1.7	2.2	4.4	2.1	1.8	3.8	**1**	-
38	Egypt	2.2	1.6	2.3	4.5	1.8	2.0	2.6	**1**	-
39	Czech Republic	3.1	2.5	2.4	4.0	2.4	2.1	3.7	-	-
40	Argentina	2.3	1.9	2.0	4.1	1.9	1.9	3.7	-	-
41	Indonesia	2.7	2.0	2.1	3.9	2.1	1.9	3.2	-	-
42	Philippines	2.8	2.1	2.1	3.4	2.2	1.9	3.5	-	-
43	Croatia	2.6	2.6	2.2	4.1	2.2	2.0	3.2	-	-
44	Chile	3.0	2.2	2.1	3.3	2.3	2.1	3.3	-	-
45	Hungary	2.8	2.2	2.1	3.3	2.0	1.9	3.2	-	-
46	Ukraine	2.2	1.8	2.1	3.1	2.1	1.9	2.8	-	-
47	Estonia	2.9	3.2	2.1	3.2	2.6	2.6	3.7	-	-
48	Iran	2.1	1.6	2.6	3.0	1.7	1.8	2.3	-	-
49	Colombia	2.6	1.6	1.9	3.8	2.1	1.9	3.2	-	-
50	Vietnam	2.6	1.8	1.8	3.4	1.7	1.6	3.3	-	-
51	Peru	2.5	1.7	1.9	4.2	1.8	1.8	3.7	-	-
52	Romania	2.4	2.1	1.9	3.2	2.0	2.0	2.9	-	-
53	Pakistan	1.9	1.5	2.3	2.5	1.8	1.7	2.5	-	-
54	Algeria	2.2	1.7	1.9	3.2	1.9	2.0	3.1	-	-
55	Venezuela	1.8	1.3	1.9	2.6	1.7	1.5	3.0	-	-
56	Nigeria	2.2	1.7	2.0	2.7	1.6	1.8	2.7	-	-
57	Bangladesh	2.2	1.9	1.9	2.8	1.8	1.9	2.8	-	-
58	Kazakhstan	2.3	1.6	2.2	2.9	1.8	2.1	2.8	-	-
59	Iraq	1.4	1.0	1.6	2.4	1.3	1.2	1.9	-	-
60	Myanmar	2.0	1.6	1.9	3.0	1.8	1.9	2.7	-	-

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Brand Finance is the world's leading independent brand valuation consultancy.

We bridge the gap between marketing and finance

Brand Finance was set up in 1996 with the aim of 'bridging the gap between marketing and finance'. For more than 20 years, we have helped companies and organisations of all types to connect their brands to the bottom line.

We pride ourselves on technical credibility

Brand Finance is a chartered accountancy firm regulated by the Institute of Chartered Accountants in England and Wales, and the first brand valuation consultancy to join the International Valuation Standards Council. Our experts helped craft the internationally recognised standards on Brand Valuation – ISO 10668 and Brand Evaluation – ISO 20671.

We quantify the financial value of brands

We put 5,000 of the world's biggest brands to the test every year. Ranking brands across all sectors and countries, we publish nearly 100 reports annually.

We advise nations on how to boost their global brands

Brand Finance has been conducting an annual Nation Brands study on the world's most valuable and strongest nation brands for over 15 years. This study has provided key benchmarks for diplomats, tourism boards, trade agencies, nation brand consultants and managers. This new Global Soft Power Index report expands on our Nation Brands methodology and focuses on measuring the soft power of different nations around the world.

We offer a unique combination of expertise

Our teams have experience across a wide range of disciplines from marketing and market research, to brand strategy and visual identity, to tax and accounting. From research and insights, public diplomacy, and crisis communications, to digital marketing – Brand Finance understands the importance of sharing a brand's story to reach business objectives.

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