



# Global Soft Power Index 2021

*The world's most comprehensive research  
study on perceptions of nation brands*



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# Global Soft Power Index 2021

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



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 <b>51</b> NEW <b>OMAN</b> Score <b>33.6</b> -	 <b>52</b> ↓ 49 <b>COLOMBIA</b> Score <b>33.6</b> +2.1	 <b>53</b> ↓ 42 <b>PHILIPPINES</b> Score <b>33.4</b> +0.9	 <b>54</b> ↓ 47 <b>ESTONIA</b> Score <b>33.4</b> +1.7	 <b>55</b> ↓ 44 <b>CHILE</b> Score <b>33.4</b> +1.2	 <b>76</b> ↓ 59 <b>IRAQ</b> Score <b>30.2</b> +2.5	 <b>77</b> NEW <b>JAMAICA</b> Score <b>30.2</b> -	 <b>78</b> ↓ 57 <b>BANGLADESH</b> Score <b>30.0</b> +1.5	 <b>79</b> NEW <b>LITHUANIA</b> Score <b>29.8</b> -	 <b>80</b> NEW <b>LATVIA</b> Score <b>29.8</b> -
 <b>56</b> NEW <b>URUGUAY</b> Score <b>33.1</b> -	 <b>57</b> ↓ 52 <b>ROMANIA</b> Score <b>32.2</b> +1.9	 <b>58</b> NEW <b>CUBA</b> Score <b>32.2</b> -	 <b>59</b> ↓ 51 <b>PERU</b> Score <b>32.1</b> +1.3	 <b>60</b> NEW <b>PANAMA</b> Score <b>32.0</b> -	 <b>81</b> NEW <b>UZBEKISTAN</b> Score <b>29.2</b> -	 <b>82</b> ↓ 56 <b>NIGERIA</b> Score <b>29.2</b> +0.4	 <b>83</b> NEW <b>ETHIOPIA</b> Score <b>29.2</b> -	 <b>84</b> NEW <b>TUNISIA</b> Score <b>29.0</b> -	 <b>85</b> NEW <b>BOLIVIA</b> Score <b>29.0</b> -
 <b>61</b> ↓ 46 <b>UKRAINE</b> Score <b>31.9</b> +0.2	 <b>62</b> ↓ 48 <b>IRAN</b> Score <b>31.9</b> +0.4	 <b>63</b> ↓ 53 <b>PAKISTAN</b> Score <b>31.8</b> +2.1	 <b>64</b> NEW <b>PARAGUAY</b> Score <b>31.7</b> -	 <b>65</b> NEW <b>BAHRAIN</b> Score <b>31.7</b> -	 <b>86</b> NEW <b>CÔTE D'IVOIRE</b> Score <b>28.9</b> -	 <b>87</b> NEW <b>ZAMBIA</b> Score <b>28.6</b> -	 <b>88</b> NEW <b>CAMEROON</b> Score <b>28.5</b> -	 <b>89</b> NEW <b>CAMBODIA</b> Score <b>28.5</b> -	 <b>90</b> ↓ 60 <b>MYANMAR</b> Score <b>28.5</b> +1.0
 <b>66</b> NEW <b>BULGARIA</b> Score <b>31.6</b> -	 <b>67</b> NEW <b>SERBIA</b> Score <b>31.4</b> -	 <b>68</b> NEW <b>COSTA RICA</b> Score <b>31.4</b> -	 <b>69</b> NEW <b>SLOVAKIA</b> Score <b>31.3</b> -	 <b>70</b> NEW <b>SRI LANKA</b> Score <b>31.1</b> -	 <b>91</b> NEW <b>ECUADOR</b> Score <b>28.3</b> -	 <b>92</b> ↓ 55 <b>VENEZUELA</b> Score <b>28.2</b> -0.6	 <b>93</b> NEW <b>GHANA</b> Score <b>28.1</b> -	 <b>94</b> NEW <b>UGANDA</b> Score <b>28.1</b> -	 <b>95</b> NEW <b>NEPAL</b> Score <b>28.0</b> -
 <b>71</b> NEW <b>LEBANON</b> Score <b>31.1</b> -	 <b>72</b> NEW <b>AZERBAIJAN</b> Score <b>31.0</b> -	 <b>73</b> NEW <b>DOMINICAN REPUBLIC</b> Score <b>30.9</b> -	 <b>74</b> ↓ 54 <b>ALGERIA</b> Score <b>30.3</b> +1.3	 <b>75</b> ↓ 58 <b>KAZAKHSTAN</b> Score <b>30.2</b> +2.5	 <b>96</b> NEW <b>KENYA</b> Score <b>27.7</b> -	 <b>97</b> NEW <b>TANZANIA</b> Score <b>27.5</b> -	 <b>98</b> NEW <b>SENEGAL</b> Score <b>27.5</b> -	 <b>99</b> NEW <b>TURKMENISTAN</b> Score <b>27.4</b> -	 <b>100</b> NEW <b>ANGOLA</b> Score <b>26.9</b> -

**David Haigh**

Chairman and CEO,  
Brand Finance Plc

## Introduction

This year is Brand Finance's silver anniversary and I find myself looking back at what has changed in the world of branding over the last 25 years.

Brand management has certainly changed a lot, with enhanced targeting, communications, distribution, research, valuation, and analytical techniques.

We now have two ISO standards for brand valuation (ISO 10668) and evaluation (ISO 20671). Brand Finance helped to develop these standards and was the first consultancy in the world to be certificated to provide reports compliant with both standards.

There is a growing recognition that brands affect all stakeholders, and an acceptance that branding applies far beyond traditional goods and services.

Corporates, charities, political parties, cities and countries now regularly discuss brand positioning, image and identity and how to improve them for diplomatic, economic and reputational reasons.

It is becoming standard practice for brands to be controlled from the very top of organisations, whether by the CEO, the President, or Director General. The Queen

herself has been described as the ultimate director of the Monarchy brand.

The outstandingly successful GREAT campaign, launched by David Cameron when he was Prime Minister, and run from the centre of power in 10 Downing Street, is a good example of a nation brand campaign, which is now being copied by other states, large and small.

On 1<sup>st</sup> April 1996, day one of Brand Finance, I met an old college friend for lunch at the Anchor Pub on the Thames South Bank. Jon Norton had been an investment banker but had dropped out of the City rat race to become a full-time artist.

I asked him to become a Non-Executive Director of Brand Finance, which he agreed to over a few pints.

Brand Finance's strapline 'bridging the gap between marketing and finance' seemed to fit a creative accountant and a creative banker setting out to value brands. We hit on the line while looking out over the Thames to the City.

Jon was probably better known as the husband of Mo Mowlam. He had met her in the 90s when he was a leading figure in the

City campaign to make New Labour popular with the people who really run the country!

Mo went on to become world famous as the architect of the Good Friday Agreement, signed in 1998, after New Labour's landslide election victory in May 1997.

But on that day in April 1996, Jon and I talked about the New Labour brand revamp, the Red Rose logo and how Labour would tap into the Cool Britannia 'vibe' to ensure that Jon Major, and his old men in grey suits, would surely lose the coming election. 'Things could only get better'.

He argued presciently that in the future, for political parties and countries alike, branding would be an essential instrument of political and diplomatic power.

10 years later, Simon Anholt, a pioneer of Nation Brand consulting, asked Brand Finance to create a table of the 100 strongest and most valuable nation brands.

We readily agreed with Simon's request and 2020 saw the publication of the 17<sup>th</sup> annual Brand Finance Nation Brands report. It remains a unique analysis which is widely studied by Nation Brand Managers.

When conducting a nation brand valuation we assess 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 drawn from our Soft Power research. 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 have researched the attitudes, perceptions and resulting behaviours.

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 country'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.



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 2020 iteration of our Nation Brand study incorporated the results of our first Global Soft Power Index research study. We researched the views of 55,000 general public respondents and 1,000 experts in 85 countries. We tested Familiarity, Reputation and overall Influence of 60 'Nation Brands'.

We also went into detail as to the reasons for their views by asking questions exploring attributes of nation brand strength against 7 key pillars (Business & Trade, Governance, International Relations, Culture & Heritage, Media & Communications, Education & Science, People & Values).

Since Ban Ki Moon, the 8<sup>th</sup> Secretary General of the UN, launched our 2020 Global Soft Power study 300 nation brand managers, and over 500 nation brand academics and students, have downloaded our research to advance their understanding of Nation Brands.

High level access is free of charge to increase understanding in this crucial area.

This year, in our second iteration of the research we have increased the general public respondent base to 75,000, drawn from 105 countries, and we have extended the number of countries covered to 100, matching the number of Nation Brands included in our annual Nation Brand Value report.

Taken together the Global Soft Power Index and the Nation Brand Value Report are invaluable resources for understanding the stature and positioning of Nation Brands, to enhance policy formulation in tourism, foreign direct investment, trade and industrial exports and cultural development.

Some commercial branded businesses have larger GDPs than some countries, and countries 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.

As the world recovers from the shock of COVID-19 it has never been more important for policy makers to understand perceptions and attitudes to better plan economic recovery.

Over the last 15 years, Brand Finance has advised Nation Brands in all five continents, and we have noticed a significant uptick in demand for this type of appraisal and advice.

For example, here in the UK we have conducted analysis for the GREAT campaign, and we are currently providing our Global Soft Power research database to the Department for International Trade as it develops trade policies for the UK in the post-Brexit world.

The Government has worked fast to confirm 90 separate Free Trade agreements following the transition period after exit from the EU. There are well publicised 'teething troubles' but the UK seems to be well on the way to demonstrating that the UK 'branded business' is 'Open for Business with the World' as the Government firmly asserts.

It's far too early to say whether Brexit will prove to be a triumph or a disaster but at least Sterling is rapidly recovering its exchange rate parity prior to 'Independence Day' on 23<sup>rd</sup> June 2016. Unemployment and inflation remain low and investors seem keen to invest

in UK property and shares. The Stock Market is buoyant. As in 1996 'things can only get better'.

But like any large, branded corporation the UK government needs to have a forensic understanding of where trading opportunities are strongest in this new world, and our Nation Brand research is specifically designed to help them understand those opportunities.

Britain remains the sixth largest economy in the world, ahead of all European countries apart from Germany.

The COVID-19 crisis seems to have been a 'game of two halves' for Britain against Germany and its other European rivals. In the first half we scored own goals galore, with PPE, test and trace, quarantine, and lockdown disasters. But in the second half the government has pulled ahead, with both discovery and roll out of vaccines, with more than enough to spare to help the Commonwealth and other developing world nations in which we want to leverage our soft power.

The brilliance of our Oxford academics, creating unique Intellectual Properties, and the skills of our world beating Pharmaceutical industry have left Britain at the top of the COVID-19 league table.

Brand Finance is here to assist Governments in this new world. For example, the Brand Finance Institute is developing a programme of best practice in Global Soft Power together with academic and nation brand partners.

We can all do better, and we hope that our Global Soft Power research, training and consulting solutions will help with that endeavour.



**Dr Paul Temporal**

Associate Fellow,  
Saïd Business School,  
University of Oxford

## Foreword

In 2020, the inaugural Global Soft Power Index and report provided unprecedented, detailed insights into how soft power is measured and built.

This year's Index and report provides even more in-depth information and analysis, with an increase in survey numbers to 75,000 people from the general public and over 750 specialists from over 100 nations. As last year, measures of soft power are expressed under three main headings – Familiarity, Reputation, and Influence – and based on the seven Soft Power 'Pillars' of Business & Trade; Governance; International Relations; Culture & Heritage; Media & Communication; Education & Science; and People & Values. In 2021, however, there are some additional questions and modifications, including a new statement about future growth potential and a survey of public opinion on nations' handling of the COVID-19 pandemic.

This extra dimension has had a substantial impact on the rankings. Germany is now top of the Global Soft Power Index 2021 and New Zealand first among the general public for the COVID-19 questions, while also posting the fastest growth in the Index. In contrast, the US is the fastest falling nation in the overall Index, from first

last year to sixth this year, and occupies the lowest place (105<sup>th</sup>) in the COVID-19 metric.

We have always known that soft power is somewhat fragile and subject to rapid change, as these ranking fluctuations show. And perception, which can of course be based on fact or fiction, is a very real part of what gives a nation soft power. Soft power strategies help enormously to create positive, lasting perceptions and thus to ensure a nation's best possible competitive positioning. The snapshot provided by this survey is a useful tool for both competitive analysis and policy enhancement.

A key point revealed in the data and discussed by expert contributors is that national leaders can have a major impact on perceptions. This is illustrated by the charisma of New Zealand Prime Minister Jacinda Arden, the steady, trusted hand of German Chancellor Angela Merkel, and the negativity and disunity generated by former US President Donald Trump. The commentary demonstrates the strong link between personal leadership brand images and those of the national brands that leaders represent, reinforcing the fact that it is not just policies that have an influence on soft power perceptions, but individual personality brand strength as well.

40 new countries are included in this year's Index and they are mainly smaller by population. Iceland (30<sup>th</sup>) and Luxembourg (32<sup>nd</sup>) are the highest ranked of these. Small size is generally no barrier to occupying a strong position in the soft power ranking, however: Switzerland, for example, ranked fifth, has well-entrenched, positive overall brand perceptions, and it has always worked hard on building its national brand image, mainly through soft power.

Indeed, smaller countries can make significant gains in the rankings. For example, the UAE ranks first in the Middle East and 17<sup>th</sup> globally in the overall Index. It is perceived to have handled the pandemic much better than its regional competitors and is gaining more soft power traction with on-going policies and planned activities such as the successful Emirates Mars Mission and other international partnerships.

Some observers have suggested that small countries should find it easier to develop a focused soft power strategy that works. The advantage that smaller countries have appears to be in the areas of agility, speed, and responsiveness to dynamic situations. The Index reveals that many smaller countries, especially those with strong

initiatives? Many countries already have in place institutional frameworks for brand development in the form of national branding task forces and councils. These are natural centres for soft power strategic planning and monitoring initiatives, particularly as they contribute heavily towards the development of a nation's identity, image, attractiveness, influence, and value.



South Korea has employed this approach, integrating soft power into its nation branding strategy portfolio overseen by a Presidential Council on Nation Branding. South Korea is ranked 11<sup>th</sup> in the Global Soft Power Index 2021. Switzerland too has a well-defined structure, with Presence Switzerland responsible for developing the image of Switzerland and implementing the strategy of the Federal Council on Switzerland's communication

reputations for good governance, tend to feature strongly on pandemic management with several of them posting high net scores. However, while they do have small populations, can achieve fast buy-in from internal audiences, and are more nimble than many large nations, they often lack the deeply held perception base of Familiarity, Reputation and Influence that larger countries have built over time. Their nation branding can thus be improved.

So how can nations strategically plan and implement soft power strategies? Should countries work on well-articulated and detailed plans and how would these fit in the fast-changing world of identity and image management? Given that nations have to deliver soft power force in dynamic short-term situations, how far is soft power reactive as opposed to proactive in nature? The evidence from the report suggests that a well-rounded soft power strategy is necessary. Countries need to perform well in crisis management situations while simultaneously developing future soft power plans for the medium and long term.

It is now generally accepted that soft power plays a huge role in the building of nation brand identity, image, and value. Do nations need to have formal structures to monitor soft power

abroad. This is another good example of a state body responsible for soft power linking directly to nation branding.

It follows from this that for nation branding to be successful there is a need to integrate all research studies that analyse financial brand valuations, soft power impact, competitiveness, happiness, and other brand-related measures they have undertaken. Outputs from task forces working on sector-specific projects as addressed through the seven soft power pillars should also be included in a nation brand master plan. Many countries use a variety of research measures and data separately but do not combine them into a coherent whole because they do not have a structure in place ensuring synergy across all activities and sectors. The Index and Report provides an opportunity for nations such as these to move to a more advanced stage by taking a deep dive via in-depth tailored research on the strengths and weaknesses that underlie their current position.

The Global Soft Power Index and report 2021 will be a valuable resource for governments, public and private sector organisations, and practitioners responsible for the development of national identity, economic and social policies, and international relationships.

# 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 over 75,000 interviews across over 100 nations

01

**Methodology**



# 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

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:

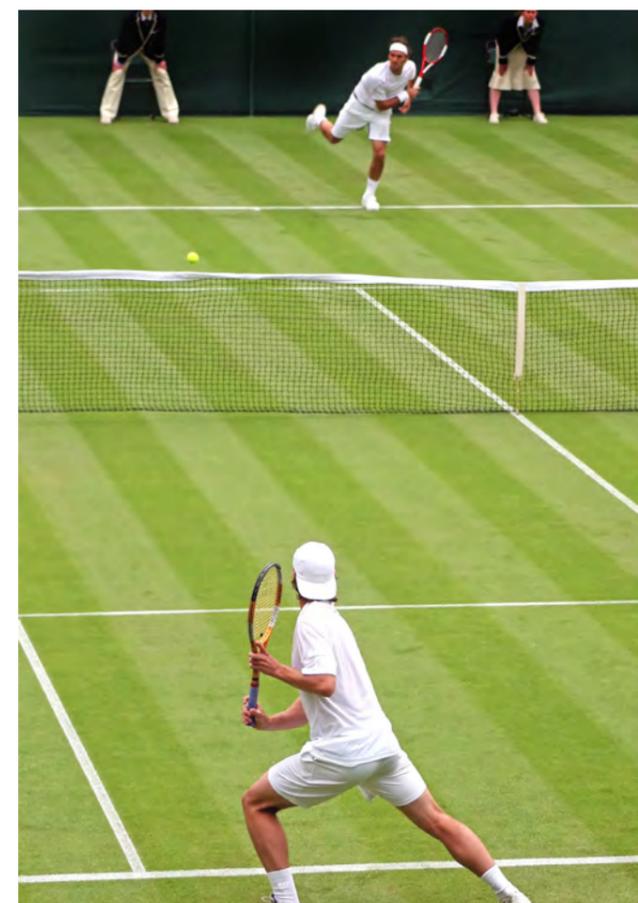
A nation’s ability to influence the preferences and behaviours of various actors in the international arena (states, corporations, communities, publics etc.) through attraction or persuasion rather than coercion.



## 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 have undertaken two rounds of expert consultations over the last two years, conducting 60 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 latest round of interviews was carried out by Brand Finance over video calls during July 2020.

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.



**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.



**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.

**Additional COVID metric**

2020 was a year like no other, putting the nations of the world to the test as they fought to negotiate the fallout and devastating repercussions of the COVID-19 pandemic. No nation was free from the pandemic turmoil and all nation brands have been impacted. Therefore, this year we have included a new metric in the Global Soft Power Index to reflect this. Respondents were asked to rate how they perceived nations to have handled the COVID-19 pandemic and were asked to rate the nations' efforts in terms of stimulating the economy, protecting the health and wellbeing of citizens, as well as cooperating on the international stage and providing aid.

**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.

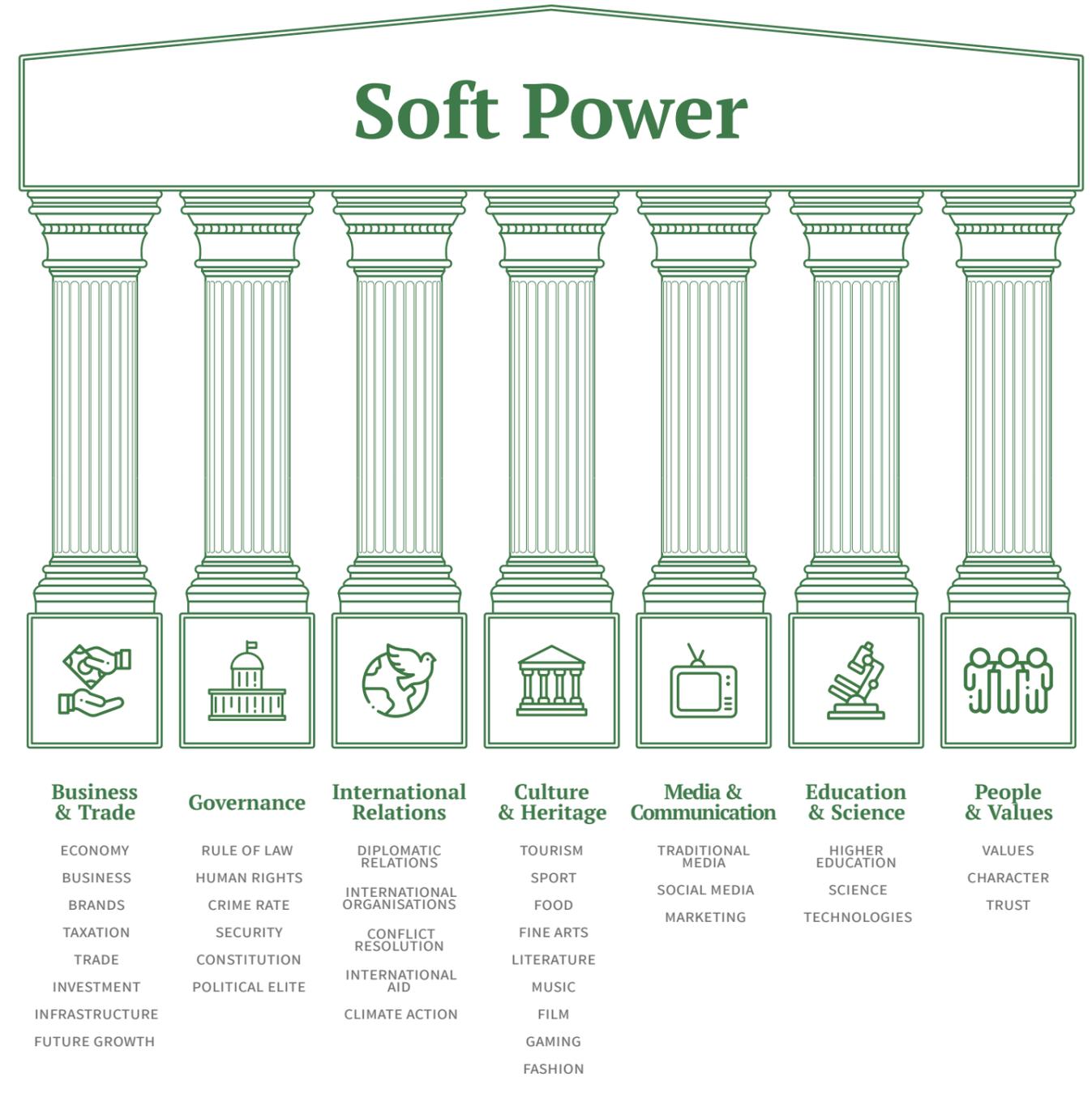


**Soft power rests on several pillars**

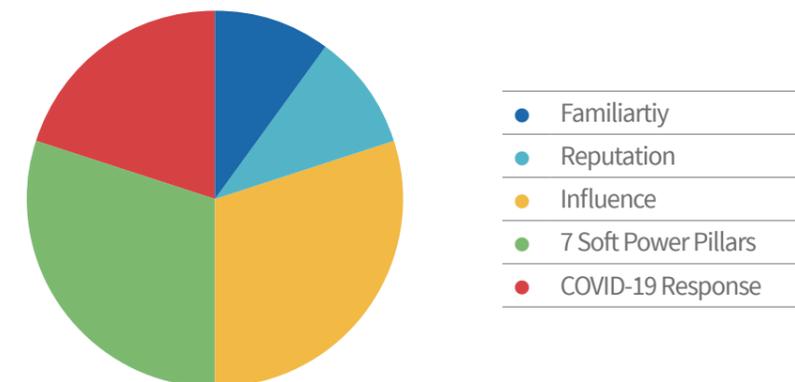
Soft power is derived and exercised in a variety of ways. We have divided the building blocks of soft power into 7 key pillars: Business & Trade, Governance, International Relations, Culture & Heritage, Media & Communication, Education & Science, and People & Values.

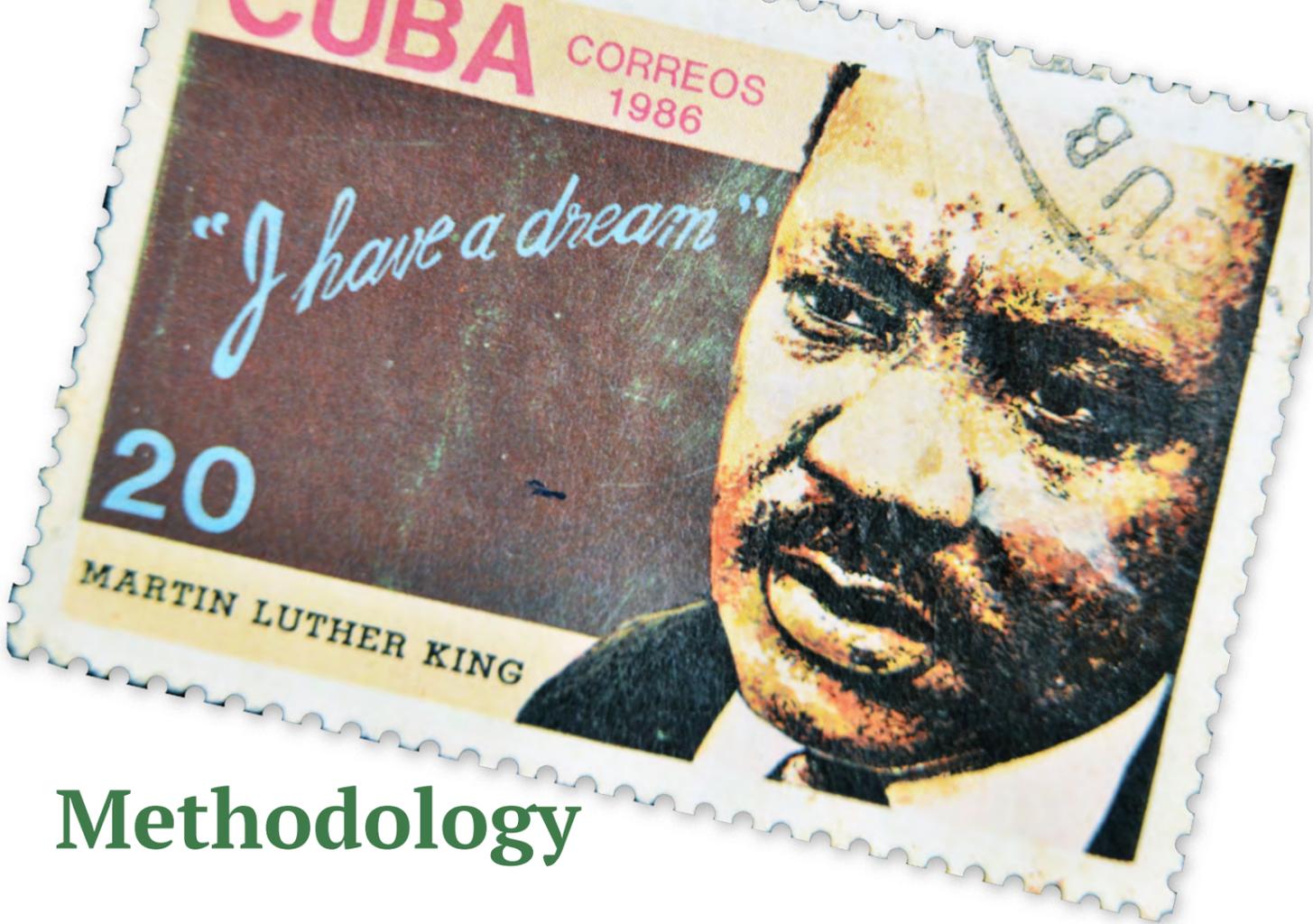
**Perceptions of soft power**

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.



**Global Soft Power Index Structure**





# 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 75,000 across more than 100 countries, surveying perceptions of soft power of 105 from around the world.

In autumn 2020, two surveys were conducted, both global in scope:

**General Public** – a survey of public opinion covering over 75,000 residents of 102 countries representing all continents and regions of the world

**Specialist Audiences** – the views of 778 experts and influencers from 47 countries and territories – 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 country deemed to have a strong and positive reputation globally?
- Performance on the core 7 Soft Power Pillars (Business & Trade, Governance, International Relations, Culture & Heritage, Media & Communication, Education & Science, People & Values)
- Performance in tackling the COVID-19 pandemic (on three pillars: Economy, Health & Wellbeing, International Aid & Cooperation). These measures were included in the Index for the first time

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 90% weighting to the views of the General Public and 10% to those of Specialist Audiences. This reflects the considerably larger sample for the General Public, and is also in line with the relative weights we give when evaluating commercial and institutional brands.

## Country coverage in Index

105 nation brands were included in the research programme. 30 of these were prioritised as ‘Tier 1’ (see map overleaf) – key nations whose global reputations were of greatest interest to our clients and subscribers. Tier 1 countries (e.g. China, US, Brazil) have higher sample sizes rating each question.

## Methodology – General Public

An online survey was conducted among over 75,000 adults aged 18-75, across 102 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 marketing 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 in effect 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 – from among the 105 selected for rating – and asked about their familiarity. For countries about which the respondent had some knowledge, we obtained a detailed assessment of reputation, influence, and performance on 31 characteristics representing the core 7 Soft Power Pillars, together with perceptions of response to the COVID-19 pandemic.



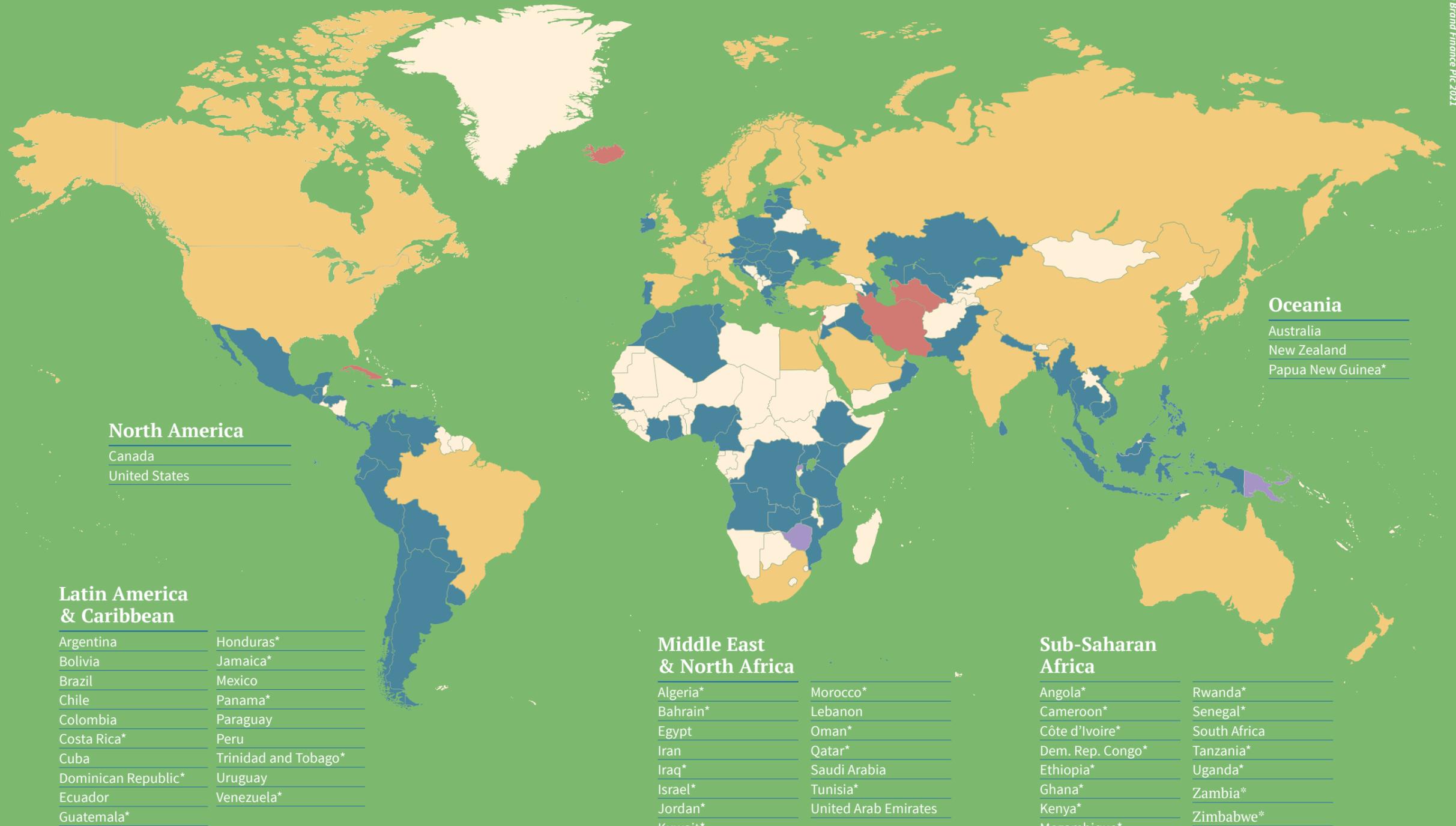
# General Public Country Coverage

- Tier 1   ● Tier 2 | With Fieldwork
- Tier 2 | No Fieldwork   ● Fieldwork Only

Over 75,000 interviews across the 102 countries surveyed were conducted as part of the General Public survey. This included virtually all of the 105 nations included for assessment of the Global Soft Power Index, with the exception of a six countries which are either very small or where online surveys are challenging (Cuba, Iceland, Iran, Lebanon, Luxembourg, Turkmenistan).

In addition, to provide the widest geographic coverage in the sample, we conducted fieldwork in three countries not included in the Index: Papua New Guinea, Rwanda and Zimbabwe.

The sample size for each country was a minimum of 800, with the exception of Azerbaijan (n=627). In key markets such as US (n=2,051), China (n=2,090) and India (n=1,442), larger samples were obtained, as was also the case in smaller developing markets covered by ad exchange samples where large samples are required in order to post-weight back to a more representative sample. These ad-exchange countries are marked with an asterisk (\*).



## Europe

Austria	Finland
Azerbaijan*	France
Belgium	Germany
Bulgaria	Greece
Croatia	Hungary
Czech Republic	Iceland
Denmark	Ireland
Estonia	Italy

Latvia	Russia	Ukraine
Luxembourg	Serbia	United Kingdom
Lithuania	Slovakia	
Netherlands	Slovenia	
Norway	Spain	
Poland	Sweden	
Portugal	Switzerland	
Romania	Turkey	

## Asia

Bangladesh*	Myanmar*	Thailand
Cambodia*	Nepal*	Turkmenistan
China	Pakistan*	Uzbekistan*
India	Philippines	Vietnam*
Indonesia	Singapore	
Japan	South Korea	
Kazakhstan*	Singapore	
Malaysia	Sri Lanka*	

## North America

Canada
United States

## Latin America & Caribbean

Argentina	Honduras*
Bolivia	Jamaica*
Brazil	Mexico
Chile	Panama*
Colombia	Paraguay
Costa Rica*	Peru
Cuba	Trinidad and Tobago*
Dominican Republic*	Uruguay
Ecuador	Venezuela*
Guatemala*	

## Middle East & North Africa

Algeria*	Morocco*
Bahrain*	Lebanon
Egypt	Oman*
Iran	Qatar*
Iraq*	Saudi Arabia
Israel*	Tunisia*
Jordan*	United Arab Emirates
Kuwait*	

## Sub-Saharan Africa

Angola*	Rwanda*
Cameroon*	Senegal*
Côte d'Ivoire*	South Africa
Dem. Rep. Congo*	Tanzania*
Ethiopia*	Uganda*
Ghana*	Zambia*
Kenya*	Zimbabwe*
Mozambique*	
Nigeria*	

## Oceania

Australia
New Zealand
Papua New Guinea*

Across each country sample, the 105 nation brands were rotated to ensure that all nations were assessed globally. Surveys were conducted in the major languages of each country, totaling 53 languages globally.

**Methodology – Specialist Audiences**

The Specialist Audiences survey covered influencers and 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 778 interviews across 47 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 or online (if previously interviewed for the 2020 Index) and invited to take part in the survey. The main interview was conducted online or by telephone, as the respondent preferred.



**Questionnaire**

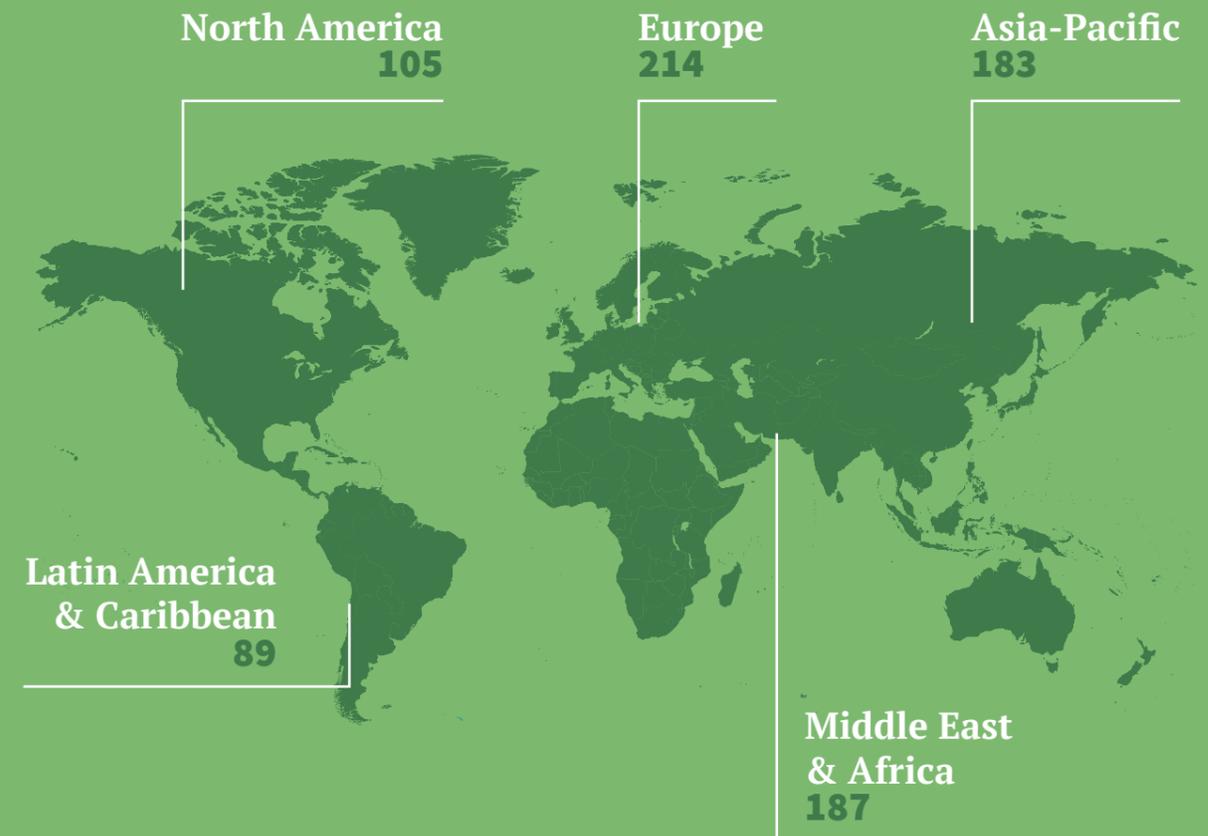
As with the General Public survey, each respondent was asked about a random sub-set of countries and asked about their familiarity. For countries about which the respondent had some knowledge, detailed assessment of reputation, influence, and performance on the 7 Soft Power Pillars was obtained. Surveys 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](mailto:softpower@brandfinance.com) if you would like more details on our technical calculations.

# Specialist Audiences

## Breakdown by Geography and Sector



**Business**  
230

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



**Analysts**  
29

Market analysts



**Politics**  
115

Local & central government officials and members of legislatures



**Academia**  
108

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



**Think-tanks & NGOs**  
106

Senior managers at think-tanks, NGOs, and charities



**Media**  
190

Editors & journalists in national and regional media



02

## Executive Summary

### What are the highlights from this year's Index?

- Strong and stable Germany is world's leading soft power superpower
- US falters as fastest falling nation, down to 6<sup>th</sup>
- Wealthy, well-governed Western and Asian nations climb ranks in the top 20
- Traditional powerhouses - the UK, France, Italy, Spain and China - see mixed perceptions of pandemic responses
- New Zealand hailed as global success story and is fastest growing in Index
- Middle Eastern nations dream big – UAE highest ranked in 17<sup>th</sup>
- Index expanded to 100 nations - Iceland and Luxembourg highest ranked new entrants



# Executive Summary

## Strong & stable Germany tops Index

A beacon of stability across the continent and the globe, in a year when this has been needed more than ever, Germany has usurped the US to become the world's leading soft power superpower, with a Global Soft Power Index Score of 62.2 out of 100 and a clear 1.6-point lead over second-ranked Japan (60.6). Germany performs consistently and well across the 11 metrics, placing in the top five across nine of these. An outlier is the People & Values pillar, where the nation ranks considerably lower in 15<sup>th</sup> spot.

Germany performs excellently in the International Relations, Governance, and Business & Trade pillars ranking in the top two for all three metrics, as well as celebrating improvements on all statements across these Soft Power Pillars. Angela Merkel has been commanding the nation and continent since 2005, and despite mixed opinions of her leadership on home soil, she is hailed globally by the general public as the world's most respected leader. Her long tenure at the helm of the nation has provided a strong

and stable presence against the backdrop of unpredictable and erratic counterparts, particularly in the face of turmoil, as the threat of an unravelling European single market increases following Britain's departure from the EU. 2021 marks the year that Europe and Germany will have to negotiate the significant void as Merkel prepares to step down as Chancellor, both her home nation and fellow-Europeans alike will be hoping Germany's recent history of reliable leadership will continue as the world works towards a post-COVID recovery.

Merkel's response to the COVID-19 pandemic epitomises her renowned credibility, with the specialist audiences surveyed perceiving Germany as the nation that handled the pandemic the best, and the general public ranking the nation 5<sup>th</sup>, behind New Zealand, Switzerland, Japan, and Canada. A scientist by training, Merkel's response was solely data-driven, and her methodical approach was viewed as a relative success on the global stage, proven by the nation recording

## Global Soft Power Index Top 20

1		↑ 2	Germany	62.2	61.9	+0.3
2		↑ 4	Japan	60.6	60.2	+0.4
3		← 3	United Kingdom	57.9	61.8	-3.9
4		↑ 7	Canada	57.2	54.5	+2.7
5		↑ 8	Switzerland	56.3	54.5	+1.8
6		↓ 1	United States	55.9	67.1	-11.2
7		↓ 6	France	55.4	58.5	-3.1
8		↓ 5	China	54.3	58.7	-4.4
9		← 9	Sweden	52.2	51.9	+0.3
10		↑ 13	Australia	52.2	48.8	+3.3
11		↑ 14	South Korea	51.3	48.3	+3.1
12		← 12	Netherlands	50.5	48.9	+1.6
13		↓ 10	Russia	50.5	51.0	-0.5
14		↑ 17	Norway	50.1	47.3	+2.7
15		← 15	Denmark	49.4	47.7	+1.7
16		↑ 22	New Zealand	49.3	43.5	+5.9
17		↑ 18	United Arab Emirates	48.4	45.9	+2.4
18		↑ 21	Finland	48.4	44.8	+3.6
19		↓ 11	Italy	48.3	49.3	-1.0
20		← 20	Singapore	47.9	44.8	+3.1

consistently lower cases per 100,000 than its Western European counterparts.

The nation's contribution to the vaccine race in the form of the BioNTech-Pfizer vaccine – the fastest vaccine to go from concept to reality – no doubt contributed to the nation's strong growth across all metrics in the Education & Science pillar, where its ranks 3<sup>rd</sup> globally, sitting behind Japan and the US.

### The demise of US soft power?

A year of widespread turmoil has been starkly reflected in America's steep downfall in the Global Soft Power Index 2021, making it the fastest falling nation globally. Between a turbulent election campaign and a haphazard COVID-19 response, the nation has lost its position as the world's soft power superpower, falling to 6<sup>th</sup> position with an overall Index score of 55.9 out of 100.

With former President Trump's hesitance to acknowledge the scale and severity of the crisis derided at home and abroad, the US finds itself at the very bottom of the COVID-19 metric – to an abysmal 105<sup>th</sup>. The raging of the virus across the nation combined with the President's rebuke of medical expertise and touting of

reckless home-remedies is the most likely culprit for the waning of America's long-held role model status internationally, at a time where sensible global leadership has arguably been most needed.

It is a testament to the broader scientific and academic community in the United States that, despite the President's own response being widely criticised, 2020 also saw improved perceptions in the Education & Science pillar. Despite dropping to second place overall in the Education & Science pillar, the US still increased by 0.5-points year-on-year to score 7.0 out of 10. The rise of Dr. Anthony Fauci in the vacuum created by Trump's anti-science rhetoric and the rapid development of the Pfizer vaccine are likely at the heart of this increase. This shows the resilience of United States' reputation for expertise and leadership in science and technology regardless of who occupies the White House.

However, scientific innovation regarding COVID-19 was not enough to save perceptions from falling with respect to Influence, Reputation, and Governance – most notably regarding the US as safe and secure, and as a nation who respects human rights. The wave of Black Lives



Matter protests and counter-protests which took over during the summer of 2020 may account for this, as the death of George Floyd at the hands of the police sparked global outrage, drawing media attention to the practices of US police officers, particularly the seemingly disproportionate use of force against African American citizens. In the face of these wide-ranging reputational challenges, the Biden administration will be tasked with regaining domestic trust and international credibility in many areas in a crowded policy to-do list.

### Well-governed nations climb ranks in the top 20

Europe and Asia command most of this year's best performing nations, taking a cumulative 75% of the top 20 spots in the Global Soft Power Index 2021. Japan is the top performing Asian nation and second overall (60.6 out of 100), jumping up two spots from last year while ranking consistently across the board on all key metrics, and leading by a significant 2.7 points over third-placed UK.

Japan continues to reap the rewards of its strong brands, solid consumer spend, and high levels of business investment, again ranking first in the Business & Trade pillar. Additionally, Japan has seen an improvement in its Education & Science score, now ranking first in this metric too.

Undoubtedly a world leader in innovation, Japan is arguably one of the first countries to understand the true power of technology and embrace its benefits, with each advancement being a solution to problems facing the nation. With significant progress in automation, use of robots, and integration of AI with daily living, Japan is likely to thrive better than many other advanced economies in years to come. This is a particularly notable success, given the slowing economy and demographic challenges being faced with its ageing population.

Countries with a high overall Index score, such as Canada (4<sup>th</sup> – 57.2) and Switzerland (5<sup>th</sup> – 56.3), also scored within the top five nations in three key metrics: Reputation, Governance, and their COVID-19 response, suggesting a correlation between being perceived positively in these metrics and ranking highly overall.

Canada, for example, is recognised for good governance (3<sup>rd</sup>) and for their COVID-19 response (5<sup>th</sup>). However, nations such as Norway and Denmark also benefit from this view – people arguably assume these nations handled the pandemic well (6<sup>th</sup> and 8<sup>th</sup>, respectively) because they are perceived as having good governance (5<sup>th</sup> and 8<sup>th</sup>, respectively).

On the flip side, ranking 47<sup>th</sup> in the overall Index, Vietnam (33.8) is a nation that managed COVID-19 extremely well, but this isn't reflected in the data. The combination of poor governance perceptions (68<sup>th</sup>) and a relatively low familiarity around the world results in a lack of credit for Vietnam's achievements. While initially criticised for its harsh response, Vietnam was spared a year of lockdowns, and besieged hospitals, and has one of the lowest COVID-19 infection and death rates in the world. Not only is the response to the pandemic impressive – given its shared border with China – but Vietnam also experienced one of the highest economic growth rates globally in 2020 – one of a handful of countries with positive growth in 2020 - all while neighbouring countries continue to wrestle with deepening recessions.

### Powerhouses suffer amid poor pandemic responses

Following a year defined by national lockdowns, travel restrictions, and social distancing measures, perceptions of soft power have been significantly influenced by nations' approaches towards the COVID-19 pandemic. Those who reacted promptly and effectively – such as New Zealand and Australia – implementing early lockdowns and tight border restrictions

have performed well across the Soft Power Pillars this year, thereby climbing up the Index.

Conversely, 13 nations have observed an overall drop in their Global Soft Power Index scores as media scrutiny of their handling of the virus caused negative trends across the Influence, Culture & Heritage, and People & Values metrics. Among these is the United Kingdom, dropping 3.9 points to an overall Index score of 57.9 out of 100, however still defending its 3rd place position in the Global Soft Power Index. This follows extensive criticism towards Boris Johnson's government for an unclear approach to curbing the spread of the virus and reluctance towards implementing a lockdown, resulting in extremely high death rates across the United Kingdom. However, as perceptions of the nation abroad tend to outperform those domestically, the UK has improved by 0.6 points in the Governance metric. Following successive changes in leadership in the aftermath of the EU referendum, the nation's improvement in this pillar is likely aided



by the less turbulent image presented by the current government. Perceptions are likely to further improve in the coming year following the United Kingdom's Brexit deal, as well as its vaccination programme, which currently races ahead of its European counterparts.

Across the Channel, France (55.4) has recorded depreciating scores across several Soft Power Pillars, most notably in Culture & Heritage and Influence, where it has dropped by 0.4 and 0.2 points, respectively. These metrics have likely been influenced by the lull in the hospitality and tourism industry following the COVID-19 pandemic, with fewer people able to experience France's culture, heritage, and culinary delights. On the other hand, the nation has only experienced a marginal drop of 0.1 point in the Business & Trade pillar, as France is increasingly regarded as one of the top European nations for attracting foreign investment opportunities. Additionally, the nation's Reputation score has remained stable at 7.2 out of 10, as France continues to enjoy international



recognition for its role in hosting the 21<sup>st</sup> Conference of the Parties and subsequent Paris Agreement on climate change.

In the East, China (54.3) and Russia (50.5), have both observed a drop in their scores across the Reputation and International Relations pillars, though China has held on to its place in the top 10 while Russia has dropped to 13<sup>th</sup> position.

China's performance in the Global Soft Power Index was likely impacted by the global media coverage of COVID-19 cases in the city of Wuhan, even though the authorities addressed the crisis very effectively and China is one of only a few countries around the world to have got the epidemic under control and to register positive GDP growth at the end of 2020. The nation has also seen a 0.5 drop in the Governance pillar, as Western perceptions of China's political system hold it back from improving its overall score.

Notably, as both nations made the significant scientific strides of developing their own vaccines, China and Russia have observed improving scores of 1.1 and 0.8 respectively in the Education & Science pillar.

**Top of mind – top scores?**

In the southern Mediterranean, both Italy (48.3) and Spain (47.5) have suffered a significant drop in the Index, with Italy sliding down 8 spots to 19<sup>th</sup> position and Spain slipping out of the top 20 – from 16<sup>th</sup> position to 22<sup>nd</sup>.

At the start of the pandemic, both nations made front-page news around the world due to the heavy death tolls brought about by the first wave, with the Italian health system nearing collapse in certain regions. In Spain, where mortality rates per 100,000 were among the highest in the world, a lapsing political consensus on how to handle the pandemic cost the



government valuable time in curbing the spread of COVID-19.

However, stories of hope from these nations have also permeated the news cycle, with videos of Italians singing on their balconies going viral around the world. Italy and Spain have benefited from these positive stories, which have sparked a consistent or improved performance across most of the soft power metrics, as both nations remained top-of-mind throughout the pandemic, reminding people of their friendly culture and trustworthy people.

Brazil (38.1), India (37.7), and Mexico (34.4) did not benefit from pre-existing positive perceptions amongst the public in the same way as Italy or Spain, and suffered from negative perceptions of their response to COVID-19, which drove down their overall Index scores. Falling out of the top 30, Brazil and India's perceived difficulties in tackling the health repercussions and economic impact of the virus outweighed their moderately positive perceptions in the Culture & Heritage pillar, where Brazil scored 5.1 out of 10 and India scored 4.1 out of 10. Dropping out of the top 40, Mexico's perceived mediocre handling of the pandemic was exacerbated by a poor performance across the board, particularly in the Governance pillar, where it scored 1.5 out of 10 due to perceptions of political instability within the country.

India does, however, score extremely well on the new metric in the Index – future growth potential – claiming a top three position, behind Japan and China. This metric captures the momentum, trajectory, and future capabilities for a nation's soft power, and this podium spot demonstrates the world's perception of India's strong potential on the global stage. During the past year, there has been billions of dollars' worth of investment in the nation from leading global brands including Google, Facebook, Amazon, and Apple.



### New Zealand hailed as global success story

New Zealand is the fastest-improving nation in the Index, claiming 16<sup>th</sup> place in the ranking with an overall Global Soft Power Index score of 49.3 – up six places from 2020. Scoring 5.9 out of 10, the nation leads globally for its COVID-19 response, which has been praised and envied the world over. Swift and decisive action in shutting borders and enforcing mandatory quarantine left the nation free of COVID-19 for months, while other nations saw daily case rates in the thousands. The government has been so successful in suppressing the disease that social distancing is not required, with tens of thousands attending a music festival in December. Perceptions of New Zealand have no doubt been bolstered as nations such as the UK and the US cede their usual place as leaders in public health, with both battling repeated waves of the virus among loosened restrictions and ongoing debates about lockdowns.

New Zealand has recorded strong results across the board, with increased scores for almost all the Soft Power Pillars and metrics, with only a slight drop in the Culture & Heritage and People & Values pillars. This is likely accounted for by

increased mental availability. With the global coverage of the nation's success in handling the pandemic, the nation of less than 5 million has likely been at the forefront of the public's mind and has therefore benefitted from positive associations generated by stories of its pandemic response.

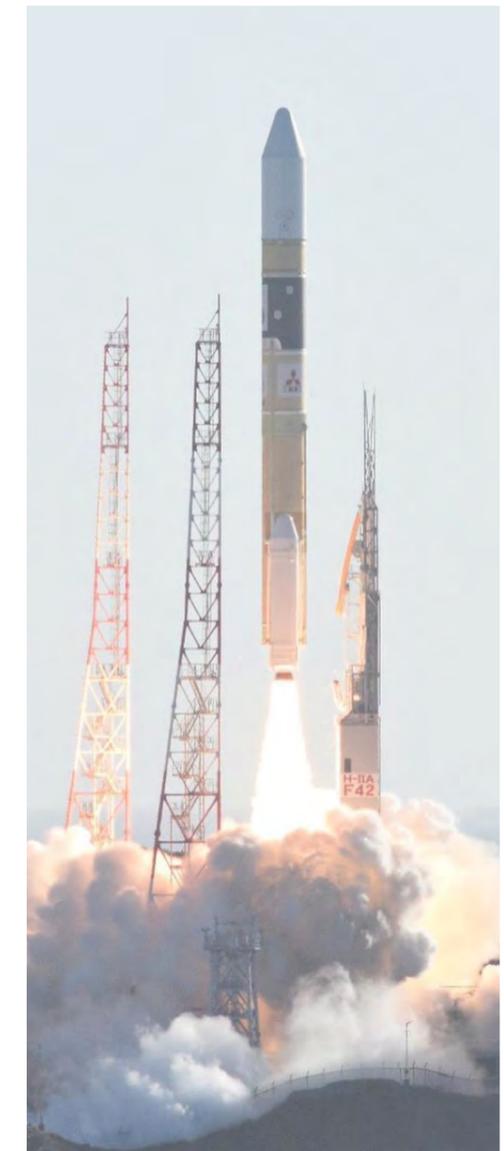
Prime Minister Jacinda Arden's leadership has been widely credited as confident and decisive, hailed by some as key to the nation's success in battling the pandemic – a view that is clearly reflected in her top 10 position among the world's respected leaders. This leadership is perhaps at the heart of New Zealand's increased recognition in Influence, International Relations, and Governance.

### Middle Eastern nations dream big

Fifteen nations from the Middle East & North Africa (MENA) region feature in the Global Soft Power Index 2021, and those that featured in the Index last year have all seen their scores improve: the UAE (up 2.4 points); Saudi Arabia (up 2.3 points); Israel (up 1.1 points); Qatar (up 3.8 points); Egypt (up 3.5 points); Iran (up 0.4 points); Algeria (up 1.3 points) and Iraq (up 2.5 points).

The UAE is the region's highest ranked nation with an overall Index score of 48.4 out of 100, simultaneously inching up the Index to 17<sup>th</sup> globally. The nation celebrates significantly improved scores across the Governance (18<sup>th</sup>), Education & Science (19<sup>th</sup>) and People & Values (24<sup>th</sup>) pillars – recording the greatest increase in the Governance pillar in the top 20 (up 0.8 points), as perceptions of its political stability vastly improve. The UAE's neighbours – Qatar and Saudi Arabia – have also celebrated marked improvements across the Governance pillar, with significant jumps in positive perceptions of their leaders, as well as views of being a safe and secure nation.

The UAE is also the highest ranked nation across MENA – and 15<sup>th</sup> globally – on the COVID-19 response metric and is perceived to have handled the pandemic better than its neighbours, Qatar, and Saudi Arabia, boosted by its contribution to international aid and vaccine development. As with all nations in the MENA region, however, the UAE suffers as it scores less on the Familiarity metric (37<sup>th</sup>), which proves to be a limiting factor across the COVID-19 metric generally.



As the nation approaches its 50<sup>th</sup> birthday in December, the UAE continues to flourish and showcase its impressive growth trajectory, reflected in its 13<sup>th</sup> rank for future growth potential among the general public. The successful Emirates Mars Mission is a clear example of the nation punching above its weight, entering the race with global heavyweights China and the US, also forming an integral part of the nation's journey to diversify its economy with sights set on long-term growth.

### Iceland and Luxembourg highest ranked new entrants

The Global Soft Power Index 2021 has been expanded to include 100 nations and therefore welcomes 40 new entrants to this year's ranking. Out of these 40 new entrants, Iceland (30<sup>th</sup> – 39.9) and Luxembourg (32<sup>nd</sup> – 39.0) are the highest-ranked nations. Both nations

score well in Governance (Iceland – 19<sup>th</sup>; Luxembourg – 21<sup>st</sup>) and COVID-19 response (Iceland – 18<sup>th</sup>; Luxembourg – 26<sup>th</sup>) – two metrics with significant correlation in this year's Index.

With nine new entrants from Europe altogether, Slovenia (46<sup>th</sup> – 34.2) ranks behind Iceland and Luxembourg but is significantly ahead of six other Eastern European new entrants. Slovenia has long pursued economic stability and political transparency, while stressing its Western perspective and central European heritage. As a member of the SFOR peacekeeping deployment in Bosnia and KFOR deployment in Kosovo, as well as being a charter member of the World Trade Organisation, Slovenia's increasing regional profile ensures this nation plays a role on the world stage quite out of proportion to its size. Slovenia's recognition for its democratic efforts is

reflected in its Governance score, ranking in the top 50 at 45<sup>th</sup> overall, despite being new to the Index.

There are also nine new entrants from Latin America and the Caribbean, however, these nations all rank in the bottom 50 in the overall Index. While these countries are currently ranked poorly in the Index, there is always the potential to do better. After 2020 – dubbed 'a year like no other' – anything is possible.

Seven new entrants hail from the MENA region, with strong placements from Kuwait (42<sup>nd</sup> – 35.8), Morocco (48<sup>th</sup> – 33.8), Jordan (50<sup>th</sup> – 33.7), and Oman (51<sup>st</sup> – 33.6). While ten nations from Sub-Saharan Africa make this



year's Index, they unfortunately all rank in the bottom 20, just behind Nigeria at 82<sup>nd</sup>. However, South Africa consistently outperforms its neighbours, ranking at 37<sup>th</sup> and overall Index score of 37.2 out of 100, following a 0.7-point year-on-year increase.

South Africa has also seen an increase in Business & Trade, jumping from 36<sup>th</sup> to 33<sup>rd</sup> overall after a 0.4-point increase to 3.4 out of 10. Aided by good weather and rain at the right time, agricultural output has been extremely advantageous in the past year – coupled with the trade spat between China and Australia, South Africa has seen a 50% rise in wine exports to the East Asian superpower.

While trade is up, South Africa is placed in the latter third of the Index for COVID-19 response, ranking 72<sup>nd</sup> with a score of 2.92 out of 10. Although the expertise and infrastructure may be in place for vaccinating the population, there remains much uncertainty about procurement and roll-out.

Lastly, Asia saw five new entrants make it into this year's Global Soft Power Index, with Sri Lanka highest ranking at 70<sup>th</sup> overall. A popular tourist destination, the Index represents the nation's core strengths, with Sri Lanka ranking 7<sup>th</sup> in Asia for Culture & Heritage – ahead of Indonesia, Vietnam and Malaysia – and 8<sup>th</sup> on COVID-19 response.



# Medal Table

As part of our annual analysis, results from the general public are tallied to see which nation wins on each of the 34 measures within the seven Soft Power Pillars. After a long and rigorous survey of public opinion – covering 75,000 respondents across 102 countries, representing all continents and regions

of the world – the results are in, and the competition for soft power superpower is hotter than ever.

## Europe's golden nugget

With a total of 17 medals, Switzerland high jumps to a podium spot overtaking the US in this year's medal table. Leading the pack in several measures, the nation most famous for neutrality, Lindt chocolate and cheese fondues is also considered by most to be the gold standard in political stability and governance, ethical standards, safety, international relations, and trustworthiness.

Ranking not second but third with 13 medals, it's no ball wonder that the US also relinquishes two golds and its position as leader in both sports and science to Brazil and Japan, respectively. The US still performs well in various measures,

### Specialist Audiences

Gold Medal	Silver Medal	Bronze Medal	Characteristic
			Familiarity
			Reputation
			Influence
			Business & Trade
			Governance
			International Relations
			Culture & Heritage
			Media & Communication
			Education & Science
			People & Values
			COVID-19 Response

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### General Public



### Soft power characteristics

Icon	Gold Medal	Silver Medal	Bronze Medal	Characteristic
				Familiarity
				Reputation
				Influence
				A strong and stable economy
				Easy to do business in and with
				Future growth potential
				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
				Easy to communicate with
				Strong educational system
				A leader in science
				Leading-edge technology
				Friendly
				Fun
				Generous
				Tolerant
				Trustworthy
				Net Economy
				Net Health
				Net International Aid

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Full Medal Table

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

winning gold for influential arts and entertainment, influential diplomatic circles, affairs I follow closely, and influential media.

Second-ranked Germany records a healthy 16 medals, leading the way in group dynamics with golds for respected leaders, a strong and stable economy, and helping other countries in need. Breaking the ice and picking its way up two places from last year to claim fourth podium spot is Canada. On par with Germany in number of medals, Canada ranks first in respecting law and human rights, being easy to communicate with, generosity and education, but misses out on measures with higher weightings in which Germany widely dominates.

An un-royal flush

Despite winning 15 medals – including two golds – and ranking third in overall Index score, the UK finds itself on the boulevard of broken teams once again, failing to make this year’s podium by a meager one place. Just ahead is New Zealand in sixth podium spot; with only five medals but top scores across all measures in COVID-19 response, it was bound to be game, set, match for the Kiwis.

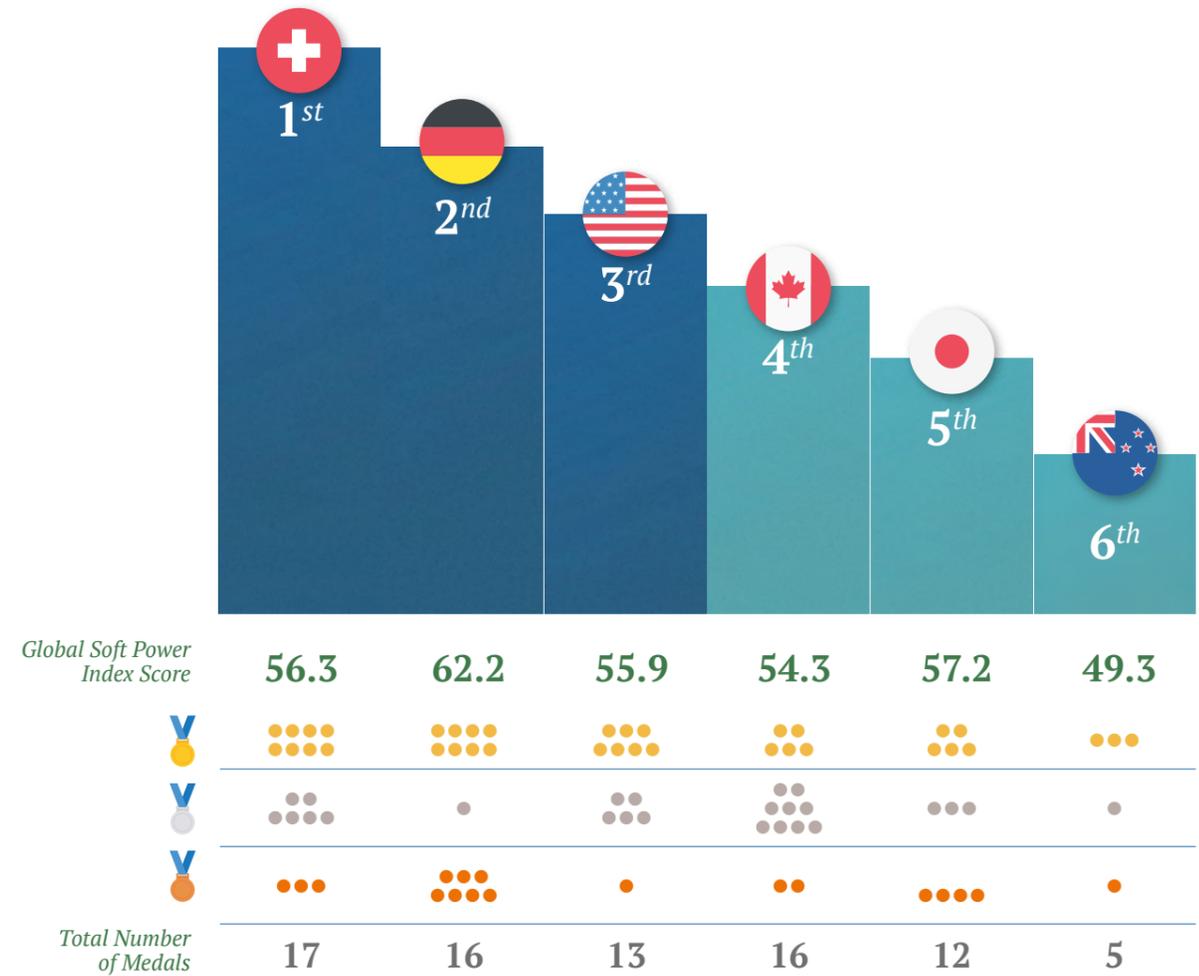
Guarding its position in 5<sup>th</sup> podium spot with 12 soft power medals is Japan. As host of this year’s Olympic Games, it will be interesting to see if this nation will turn assumption on its head and prove to be a leader in sports after all.

Countless roads to soft power

Although public opinion may account for the lion share of the weighting in each of the Soft Power Pillars, specialist audience perceptions for the same measures within these pillars may differ. These specialist audiences include business leaders, market analysts, politicians, academics, think-tanks, NGOs, and journalists.

For instance, in this year’s Index, the general public ranked Italy, Spain and France as the top three nations for

Podium of Winners



Culture & Heritage, where the specialists awarded gold, silver and bronze to Egypt, Peru and Portugal, respectively.

These differences can also be seen when comparing public and specialist opinions in the Business & Trade and People & Values pillars. While both the general public and specialist audience included Germany and Canada in their top three ranking nations for these pillars, they awarded the other two spots to different nations entirely. In Business & Trade, the general public included Japan and US

as first and third respectively, while the specialists awarded silver and bronze to Sweden and New Zealand.

As the medal table shows, each of the soft power nations finds its place in the world by defining its image and differentiating itself from other nations. While the roads to soft power may be varied, it is up to each nation to determine its own route. As global politics continues to transition to a new normal, we are sure our medal table will change with it.

## What stories are the data telling?

- **COVID-19 crisis: New Zealand Trumps America**
- **Female Leaders: Building Bridges Not Walls**
- **Future Growth Potential: Japan Soars and BRICS Build Strength**
- **Acts to Protect the Environment: Nordic Nations Global Leaders in Sustainability**
- **Millennials: An Engaged and Receptive Target for Nation Brands**

03

**Deep Dive**

# New Zealand Trumps America

## Global Soft Power Index Ranks New Zealand Top and US Bottom for Combatting COVID-19

A new metric was included in the Global Soft Power Index this year, where respondents were asked to rate how they perceived nations to have handled the COVID-19 pandemic. They were asked to rate the nations' efforts in terms of

across the three measures (economy, health & wellbeing, and international aid & cooperation). Prime Minister Jacinda Ardern's swift response and clarity of communication in handling the crisis has been widely praised by the media and recognised by people the world over.



At the other end of the spectrum, ranking bottom among nations globally, and dropping out the ranking to 105<sup>th</sup>, is the United States with a regretful net score of -16%. Former President Trump's response to the pandemic caused controversy both at home and abroad, with Trump repeatedly refusing to acknowledge and act on the severity of the situation. With the most

stimulating the economy, protecting the health and wellbeing of citizens, as well as cooperating on the international stage and providing aid.

### New Zealand versus the US

Hailed as a global success story in the combat of COVID-19, New Zealand has been rated by the general public as the country that best handled the pandemic, with a net score of +43%. The net score is the difference between 'handled it well' and 'handled it badly' responses



## Governance vs. COVID-19



cases and COVID-19-related deaths globally, the world's largest and strongest economy has encountered harsh criticism and questioning on the global stage.

**Disappointing performances with reputations under threat**

Other Western powerhouses' weaknesses have also been displayed for the world to see during the pandemic, and their failings have not gone unnoticed by respondents.

The United Kingdom (34<sup>th</sup>), Spain (81<sup>st</sup>), and Italy (94<sup>th</sup>) all rank particularly low and record low net scores. The UK has struggled to negotiate the ongoing repercussions from the pandemic, including the fallout from the sharpest economic contraction on record – 20.4% in April last year, leaving the nation in a state of turmoil. The UK, Spain, and Italy are currently within the top 10 highest mortality rates per 100,000 in the world, with the UK recording the highest mortality rates per 100,000 among the three at 173.06.

**Role models of crisis management?**

Many affluent nations with a strong reputation of being well-run, have emerged as apparent role models in crisis management, often regardless of their approaches to handling the pandemic. Strong net

scores were noted by nations such as Japan (2<sup>nd</sup>), Switzerland (3<sup>rd</sup>), Canada (5<sup>th</sup>), Norway (6<sup>th</sup>), Finland (7<sup>th</sup>), Denmark (8<sup>th</sup>), South Korea (9<sup>th</sup>), Singapore (10<sup>th</sup>), Australia (11<sup>th</sup>), Austria (12<sup>th</sup>), and Sweden (13<sup>th</sup>). These high scores are directly correlated with high scores across the Governance pillar, where all these nations rank comfortably within the top 20.

Sweden – a nation that was particularly controversial in its COVID-19 response, snubbing the lockdown consensus and imposing comparatively relaxed restrictions and policies in pursuit of herd immunity – has a troubling 121.04 deaths per 100,000. However, the general public and specialist audiences both rank Sweden a high 13<sup>th</sup> globally for its handling of the pandemic across all three measures.

Japan has defied the odds of many that expected the nation to be one of the worst hit at the beginning of the COVID-19 outbreak – due to its proximity to

**The stark contrast between the public's perceptions of how New Zealand and the US handled the pandemic, epitomises the two nations' contrasting visions of the world, spearheaded by almost polar-opposite leaders. On the one hand, we have Arden's open, liberal, and compassionate policies versus Trump's often combative, protectionist, and isolationist approach. As President Biden takes the reins of power, all eyes will be on him to kickstart recovery across the nation.**



**Reputation and COVID-19 Response**





China, its densely populated cities, and burgeoning elderly population. But it has emerged as relatively successful, with lower Coronavirus cases and deaths and with its economy faring better.

**Lack of familiarity hinders nations**

At the same time, many other nations do not receive enough credit for their efforts where credit is clearly due. Vietnam's net score is just +8% and is ranked 59<sup>th</sup>, despite recording staggeringly low COVID-19 cases and deaths. The story is the same for Slovakia (ranked 70<sup>th</sup>) with a net score of only +5%, but with far fewer cases than its European counterparts and a successful mass asymptomatic testing programme, which countries like the UK are hoping to replicate, the nation nonetheless falls far lower down the ranking than expected.

The results demonstrate that in order for nations to establish positive perceptions of their actions, there are many more factors at play than successful implementation of their policies. As shown, reputation plays a vital role, as does familiarity. Nations with high reputations are often given extra credit by the general public, while those receiving low media attention have notably underperformed.

**Germany's success recognised by specialist audiences**

According to the specialist audiences, it was Germany that has come out on top as the country that has handled COVID-19 best, with a net score of +71%. New Zealand was ranked 3<sup>rd</sup> by specialist audiences with a net positive score of 57%. Compared to the general public, the specialist audiences have understood and recognised the greater challenge that Germany has faced throughout the pandemic, as a nation with a much larger population and shared borders with several other nations, unlike New Zealand.

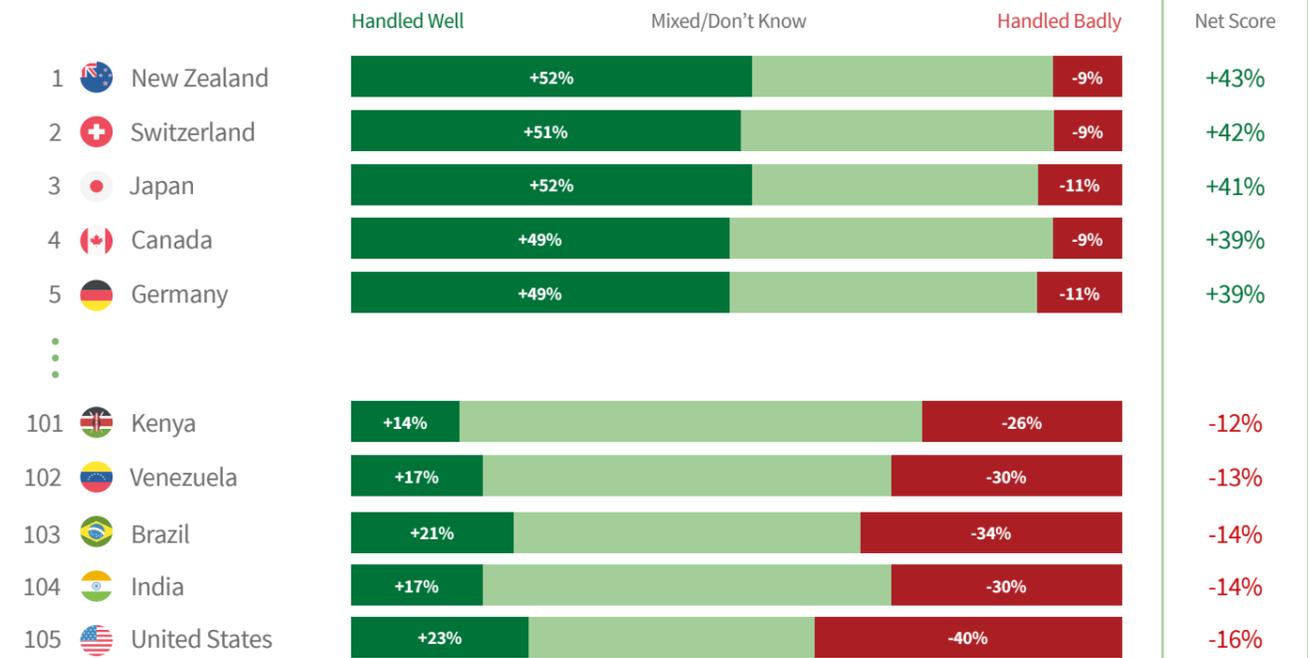
**China most complimentary of WHO's handling of COVID-19**

One further question was added to the Global Soft Power Index survey asking how respondents perceived the World Health Organisation's handling of the crisis. Overall, 31% of respondents believe WHO 'handled it well', compared to 20% who believed it was 'handled badly'.

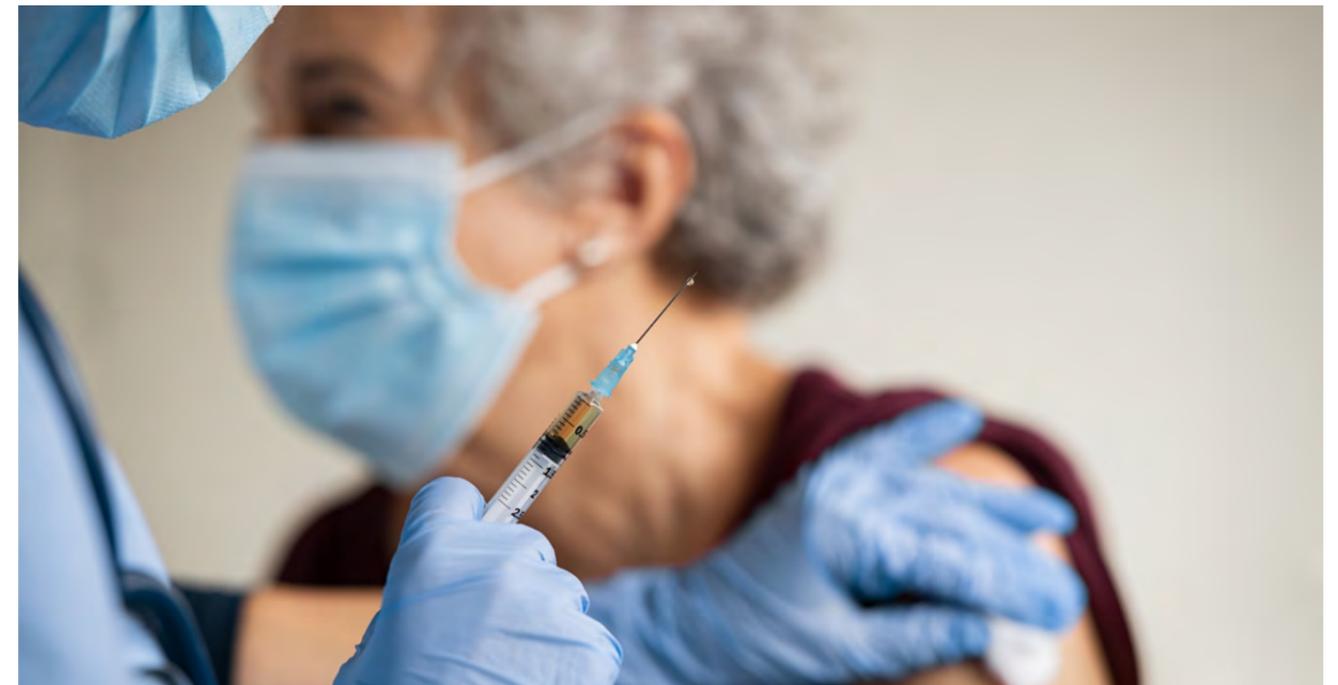
Chinese respondents were the most complimentary of WHO's handling of the crisis, with a net positive response of +53% of respondents saying the organisation 'handled it well'. At the other end of the spectrum, Japanese respondents were the least complimentary, with a net negative response of -51% of respondents saying the organisation 'handled it badly'.

Interestingly, there were mixed reviews across the US, which notably withdrew from WHO this year. 35% of US respondents said WHO 'handled it well', 26% 'handled it badly' and 33% answered 'mixed'.

**Perceptions of how well nations handled COVID-19\***



\*General Public data



# Female Leaders: Building Bridges Not Walls



**Gabriela Salinas**  
Global Managing Director,  
Brand Finance Institute

A lot has been written about how female leaders have managed the pandemic better than their male counterparts. Realising that most articles were anecdotal, and given our extensive Global Soft Power Index database, during 2020 we set out to answer if female leadership had a positive impact on nations' soft power. Our analysis showed that nations led by females outperform, on average, their male-led counterparts across all of the 11 metrics covered by the Global Soft Power Index, with the most significant lead in the Governance, Covid-19 response, Business & Trade, and International Relations pillars.

Looking at a more granular level, of the 34 statements that the general public audiences were asked about, female led nations excel in all but three metrics. Female led nations have the most

significant lead on measures that relate to safety, security, and stability.

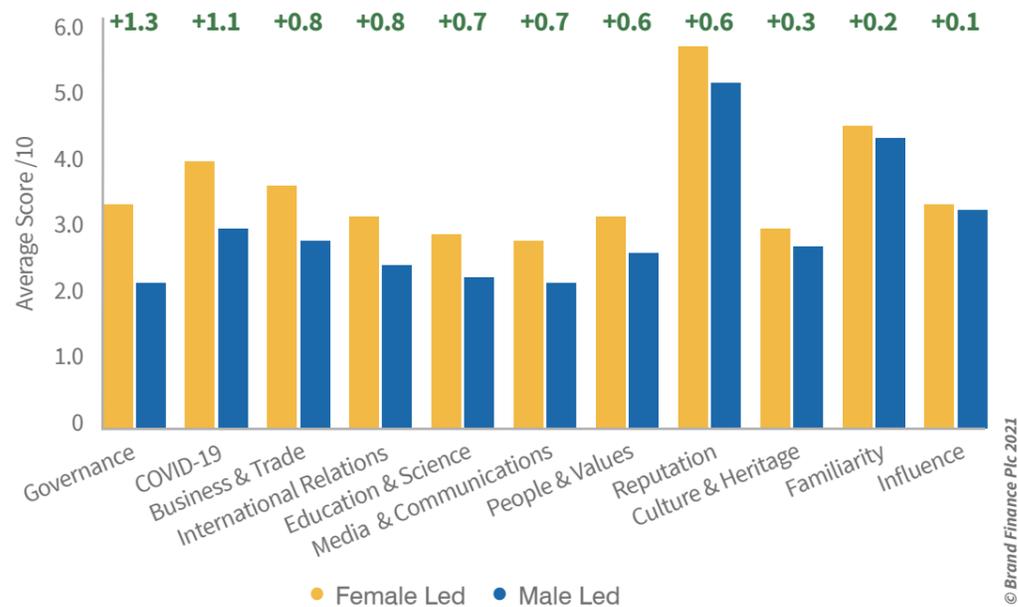
Attributes where male led nations score better than female led nations include being influential in arts and entertainment, food the world loves, and perceptions of being fun - all arguably factors that are driven by the nation's longstanding culture rather than its governance and leadership.

During a year of disruption, chaos, and uncertainty, notably, a select few female leaders have been commended for their stable leadership and empathic approach. Angela Merkel and Jacinda Ardern are the two most prominent female leaders in this debate, with their nations perceived amongst both specialists and general audiences as having handled COVID-19 most effectively.



**Parul Soni**  
Associate,  
Brand Finance Plc

## Difference in scores of female led nations and male led nations



The attributes where female led nations most significantly outperform male led nations are widely regarded as attributes that lead to long term success. If we take a closer look, we can see that most of these variables are related to attributes in which women are considered to excel by political leaders. According to Dee Dee Myers (2009), former White House Press Secretary, political leaders and voters believe that female leaders excel at “caretaking skills”, “team building”, and “motivating others”, and “tend to be more pragmatic and results oriented (...) less consumed by the constant who's-up-and-who's-down score keeping aspect of the political game.” Women focus less on the swings of short-term popularity, and more on the endgame.

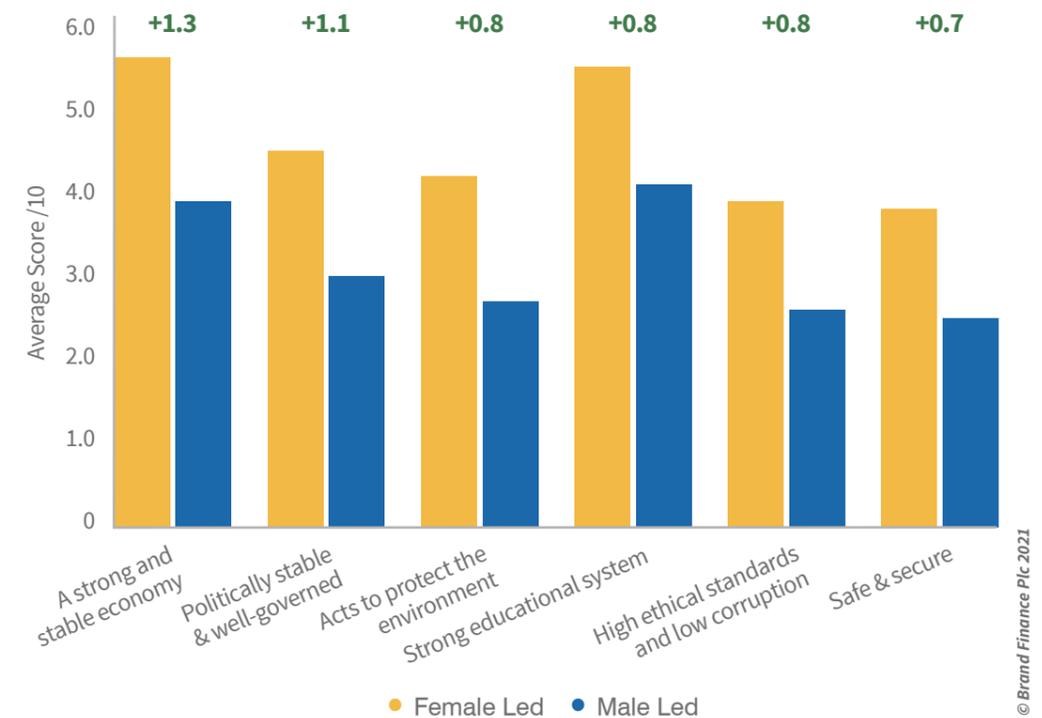
This long-term orientation, together with their ability to compromise, listen, and work across party lines, are key to lead effectively in the current situation in which polarization, partisanship and divisive narratives are stalling progress.

These gender traits seem to be particularly effective in leadership during a crisis.

Zenger and Folkman (2020) explain that female leaders face a “glass cliff” when they are advancing towards the highest levels of an organisation: “when a company is in trouble, a female leader is put in charge to save it.” According to these researchers, during a crisis, we look at leaders who show honesty, integrity, adaptability, security, collaboration, and empathy. These are the traits that are more often displayed by women. As Kofi Annan put it, “for generations, women have served as peace educators, both in their families and in their societies. They have proved instrumental in building bridges rather than walls.”

This unifying drive, together with the transformational leadership style that is associated with female leaders, provides both the strength and flexibility that are required to thrive in extremely volatile and uncertain contexts and is evidenced in this year's Global Soft Power Index survey as the general public and specialists in different fields are recognising this.

## Attributes where female led nations have a significant lead



# Future Growth Potential

## Japan Soars and BRICS Build Strength

After a year of turbulence, which has seen economic growth stall and stalwarts of the Global Soft Power Index drop down the ranking, Brand Finance has introduced the Future Growth Potential metric as a forward-looking metric of public opinion. When asked which nations have the greatest potential for future growth, Japan comes out in the top spot scoring 5.8 out of 10.

This comes despite domestic concerns about demographic shifts, which are leading to a severe imbalance in the workforce. The nation has also suffered economic concerns including the negative impact of COVID-19 on the manufacturing and tourism industries, as well as the ramifications of the postponement and possible cancellation of the Tokyo Olympic Games. Despite this, Japan is clearly viewed as a key force for the future.

Small but mighty Singapore punches above its weight in this year's Future Growth Potential metric. The nation of five million claims 5<sup>th</sup> place in the Future Growth Potential metric, beating out economic juggernauts and population giants, marking it as a nation to watch out for in the years ahead.

The world's largest populations and economies, China and India, claim second and third place respectively. Together these nations account for 35% of the world's population. With this demographic advantage, these nations are set to

### Future Growth Potential Metric

Rank	Nation	Future Growth Potential
1		5.8
2		5.6
3		5.4
4		5.3
5		5.2
6		5.2
7		5.1
8		5.1
9		5.1
10		5.0

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enshrine their powerhouse status by providing a well of future global talent.

The non-Western bloc known as the BRICS (Brazil, Russia, India, China, South Africa), are all represented in the top 10. Other than the two Asian nations, Russia, South Africa, and Brazil all have strong showings in the Future Growth Potential metric, claiming 6<sup>th</sup>, 8<sup>th</sup>, and 9<sup>th</sup> place, respectively. This strengthens the notion of public opinion moving away from the West and towards rising challengers as the economic powerhouses of the years to come.

With the exception of Russia, European nations are entirely absent from the top 10, with Germany scraping 11<sup>th</sup> place (5.0) - and only two Western nations, Australia and Canada, present. The

notable absence of traditional Western giants like the US and UK signals a broader shift in perceptions about where global power lies and what the future looks like and suggests the waning of the West's star power.

Despite regional variations and trends, there are common threads which link many of these top 10 nations. The pillars most correlated with a strong Future Potential Growth performance encapsulated business-friendly attitudes, leadership in technology development, cultural and governmental influence. This mix of economic and broader societal and cultural factors shows the plethora of ways that soft power considerations are integral to the public's perception of where the future lies.



# Nordic Nations Global Leaders in Sustainability

several European nations are perceived favourably in the Global Soft Power Index for their efforts to protect the environment, particularly the Nordic countries. These high scores are directly correlated with the Environmental Performance Index. Scoring 6.6 out of 10 for acts to protect the environment in the general public survey, Norway is the best performing nation in this regard, with a sustainable and environmentally friendly ethos embedded into both policy and the Norwegian way of life. Planning to achieve carbon neutrality by 2030, the Norwegian government has made strident steps to tackle the climate crisis, most notably investing in cycling and public transport, tracking carbon dioxide emissions, and introducing tax exemptions for electric vehicles, as Norway now dominates in electric vehicle share around the world.

Other Nordic countries, which benefit from high levels of citizen engagement towards sustainability initiatives also performed extremely well, such as Sweden (6.3), Finland (6.2), and Denmark (5.9). Sweden's exceptional performance is boosted by more than half of its energy coming from renewable sources, while Denmark has eliminated over one third of all transportation fossil fuel use. Finland, which has pledged to ban its use of coal in power generation and reduce its dependency on fossil fuels by 50% by 2030, has also benefited from the city of Lahti being named as the European Green Capital 2021.

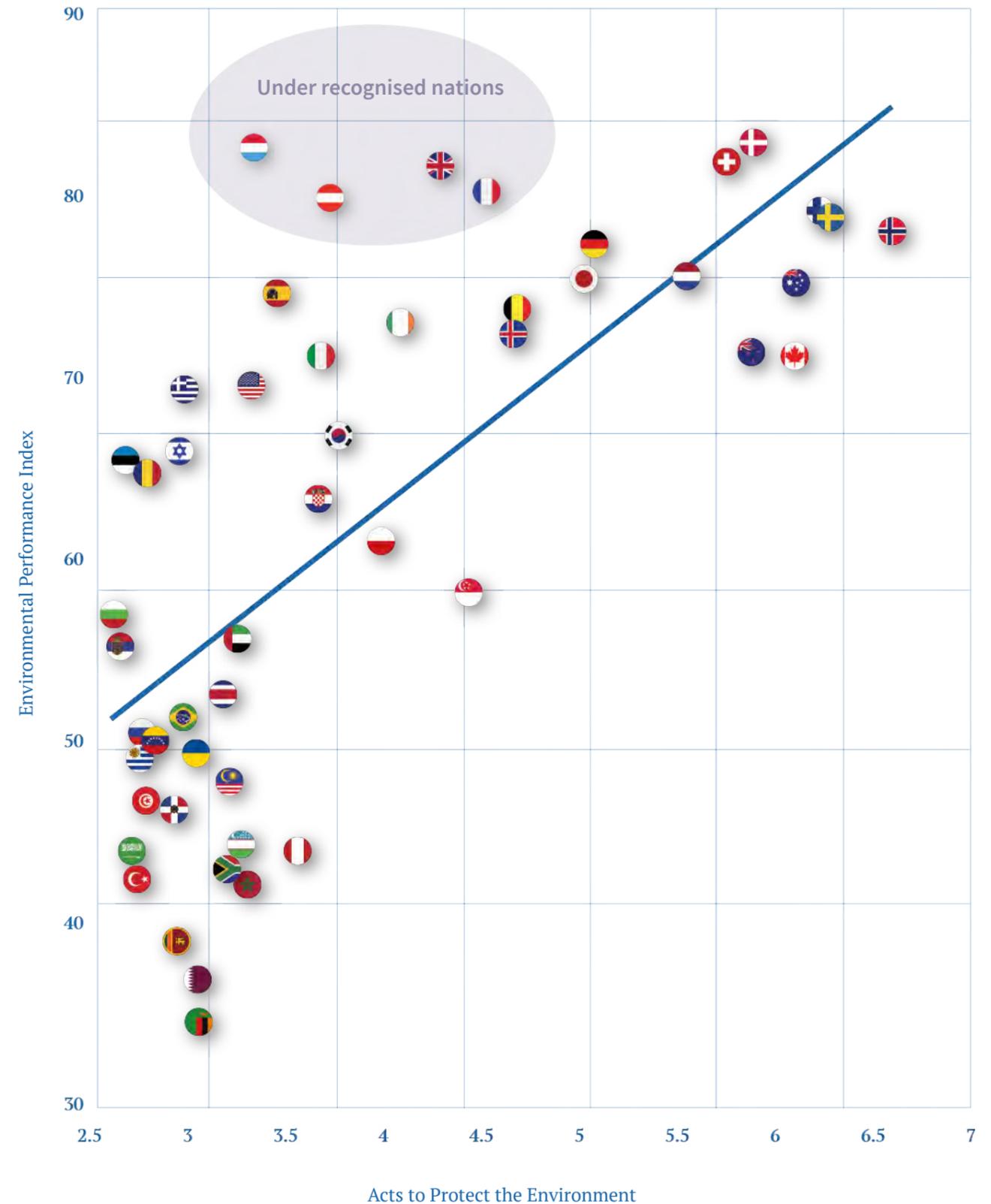
## Oceania perceived as most environmentally friendly continent

Oceania is perceived as the most environmentally friendly continent, with Australia (6.1) and New Zealand (5.9) standing out amongst respondents for their acts to protect the environment. Resolving to reduce its net emissions to 50% of 1990 levels by 2050, New Zealand is often considered to be one of the greenest countries in the world, with around 40% of economic inputs coming from sustainable sources. While Australia performed well in our research, the incumbent government has been widely criticised for making insufficient steps to meet its goals set out by the Paris Agreement. This has been exacerbated by criticism towards its response to the widespread bushfires at the beginning of 2020, which wiped out much of the nation's wildlife and affected around three billion animals.

## US suffers effects of Paris Agreement withdrawal

The US ranks notably low for its environmental efforts, in 27<sup>th</sup> place overall. This has undoubtedly been influenced by Donald Trump's controversial withdrawal from the Paris Agreement, which took effect in November 2020. However, not all hope is lost, as incumbent President Joe Biden pledged a renewed focus on environmental issues, beginning with re-entering the Paris Climate Agreement at the beginning of 2021.

Perceptions of acts to protect the environment vs Environmental Performance Index



**Japan crowned as most environmentally friendly Asian nation**

Japan is perceived as the most environmentally friendly country in Asia, scoring 5.0 out of 10 for its acts to protect the environment. While Japan remains the world’s fifth largest emitter of carbon dioxide and is widely criticised for its urban planning and disposal of nuclear waste, it races ahead of other Asian nations in its meticulous method of sorting garbage and strong recycling policy. Following Japan are Singapore (4.4), South Korea (3.7), which are the only other Asian nations among the top 20 countries perceived as acting to save the environment. Contrarily, China which, at 28%, holds the largest share of the world’s CO2 emissions, was one of the worst performing Asian nations in this regard, scoring 2.3 out of 10 for its acts to protect the environment.

**More work to be done in LATM and MEA regions**

Latin American nations have a tough road ahead in terms of perceptions of their environmental policies, with most of these concentrated in the middle or at the bottom of the metric. For example, high deforestation levels, illegal wildlife and poaching trade, and water pollution contributed to Brazil’s poor metric score of 2.9. In the Caribbean, Trinidad and Tobago (1.8) and Jamaica (1.9) were considered among the bottom 20 nations who act to protect the environment.

Middle Eastern and African countries were the worst performing in the environment metric, with Cameroon (1.0), Angola (1.5), and Uganda (1.8) holding the worst scores in this metric. In the Middle East, Iran (0.9) and Iraq (1.0) were considered to hold the least regard towards protecting the environment. Iraq’s low score is undoubtedly attributed to the nation being one of the only countries in the world to have never ratified the Paris Agreement. In the case of Iran, respondents’ perceptions were influenced by Iran’s high levels of greenhouse gas emissions, as the nation currently accounts for 2% of global CO2 emissions.

**Acts to Protect the Environment**

Rank	Nation	Acts to protect the environment score
1		6.6
2		6.3
3		6.2
4		6.1
5		6.1
6		5.9
7		5.9
8		5.7
9		5.5
10		5.1

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# Millennials: An Engaged and Receptive Target for Nation Brands



**Steve Thomson**  
Insight Director,  
Brand Finance

As with any brand, nations want to know that the long-term outlook for their nation brand is positive. Hence the views of younger people are especially important in providing signals of possible longer-term shifts in global perceptions – as well as shedding light on whether younger people generally have different perceptions of nation brand characteristics.

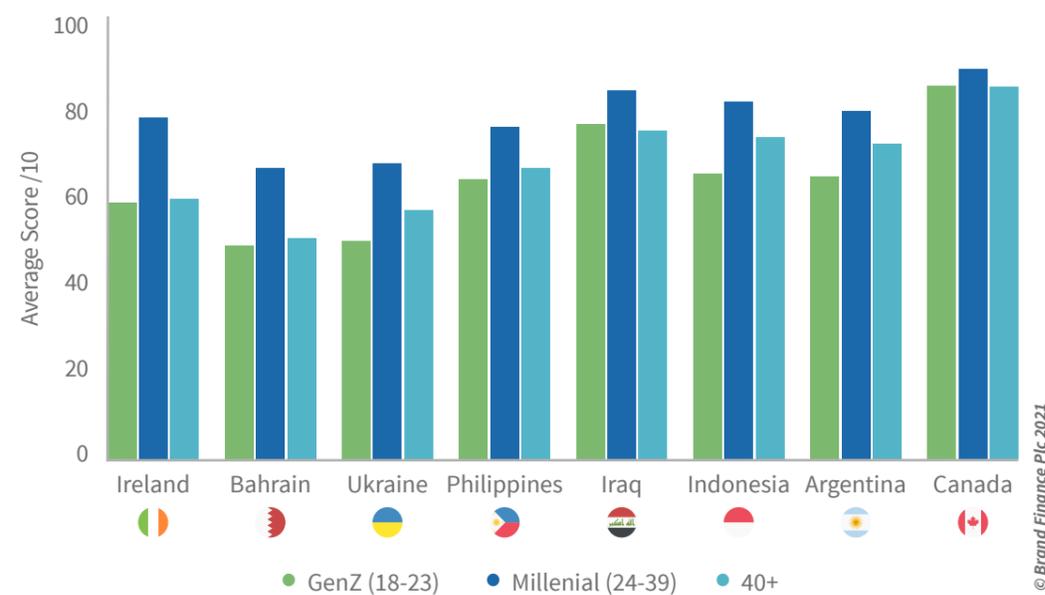
In aggregate, younger people do view nations differently simply because a much higher percentage of Gen Z and Millennial people live in regions such as Sub-Saharan Africa and South Asia. Global age cohort analysis is skewed by this of course, and for this analysis we have also assessed patterns within key countries such as the UK, Germany, the US, Nigeria, India, and China.

Familiarity comes with experience, with Gen Z people typically less familiar with other nations compared with

their older peers. In many countries, the Gen Z age group has had fewer opportunities to travel, but also their innate interest in international and world affairs is lower. Millennials, on the other hand, display a higher thirst for knowledge of other countries and cultures, combined with great maturity and (often) the ability to travel. The net result is that in countries such as Brazil, China, India, and the US, the Millennial cohort displays the highest Familiarity levels. Nations might consider targeting this group rather than Gen Z, even with youth-orientated cultural or tech-led initiatives.

For example, in India, Millennials are significantly more Familiar with a number of nations, often those in the second tier of countries on this measure (whereas virtually all Indians are familiar with the US, Pakistan, etc.).

## Familiarity of Nations among Indians



Familiarity improves Reputation; hence Millennials also tend to be more positive about different countries in rating their

reputations. More notably, certain countries rank significantly higher or lower globally among younger cohorts.

## Global Reputation Rankings (Selected Countries)

	Gen Z (18-23)	Difference with 40+	Millennial (24-39)	Difference with 40+	40+
	47 <sup>th</sup>	+29	65 <sup>th</sup>	+11	76 <sup>th</sup>
	37 <sup>th</sup>	+18	40 <sup>th</sup>	+15	55 <sup>th</sup>
	34 <sup>th</sup>	+15	35 <sup>th</sup>	+14	49 <sup>th</sup>
	17 <sup>th</sup>	+14	26 <sup>th</sup>	+5	31 <sup>st</sup>
	13 <sup>th</sup>	+11	21 <sup>st</sup>	+3	24 <sup>th</sup>
	30 <sup>th</sup>	+10	35 <sup>th</sup>	+5	40 <sup>th</sup>
	39 <sup>th</sup>	+10	40 <sup>th</sup>	+9	49 <sup>th</sup>
	39 <sup>th</sup>	+10	40 <sup>th</sup>	+9	49 <sup>th</sup>
	6 <sup>th</sup>	+9	9 <sup>th</sup>	+6	15 <sup>th</sup>
	34 <sup>th</sup>	+9	40 <sup>th</sup>	+3	43 <sup>rd</sup>
	10 <sup>th</sup>	-5	6 <sup>th</sup>	-1	5 <sup>th</sup>
	6 <sup>th</sup>	-5	1 <sup>st</sup>	0	1 <sup>st</sup>
	17 <sup>th</sup>	-6	17 <sup>th</sup>	-6	11 <sup>th</sup>
	17 <sup>th</sup>	-6	14 <sup>th</sup>	-3	11 <sup>th</sup>
	13 <sup>th</sup>	-6	10 <sup>th</sup>	-3	7 <sup>th</sup>
	76 <sup>th</sup>	-9	70 <sup>th</sup>	-3	67 <sup>th</sup>
	59 <sup>th</sup>	-10	51 <sup>st</sup>	-2	49 <sup>th</sup>
	103 <sup>rd</sup>	-11	94 <sup>th</sup>	-2	92 <sup>nd</sup>
	59 <sup>th</sup>	-28	35 <sup>th</sup>	-4	31 <sup>st</sup>
	86 <sup>th</sup>	-51	59 <sup>th</sup>	-24	35 <sup>th</sup>

Higher reputation among Gen Z (indicated by upward arrow)

Lower reputation among Gen Z (indicated by downward arrow)

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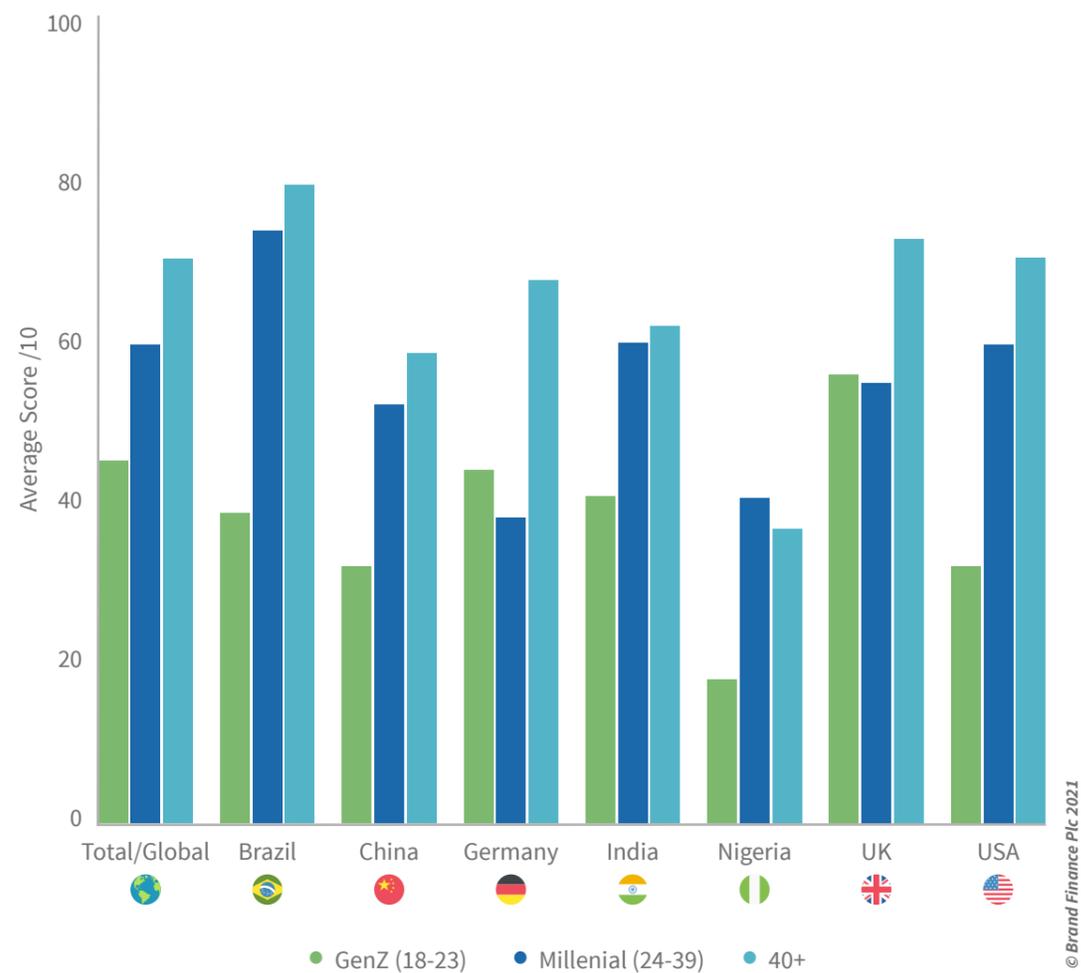
Notably, younger cohorts are somewhat less positive about smaller liberal nations such as Sweden and Switzerland. Conversely, Gen Z and Millennial respondents tended to rate the reputations of countries such as Russia, Turkey, and the Philippines more highly than their older peers.

While geography is partly at play (older Europeans tend to rate Nordic countries highly), the Gen Z cohort does appear more positive towards countries whose reputations are more mixed.

For example, the Reputation ranking of Russia among Brazilians and Germans is significantly higher among Gen Zs (and this is the general pattern across many key markets).

Ratings for whether a country's impact and influence are a positive or negative force show a similar pattern. Liberal European nations are struggling to convince some younger people globally that they are attractive and influential. Perceptions of Denmark, for example, are not quite so strong among younger people.

### % Who believe Denmark is a positive influence



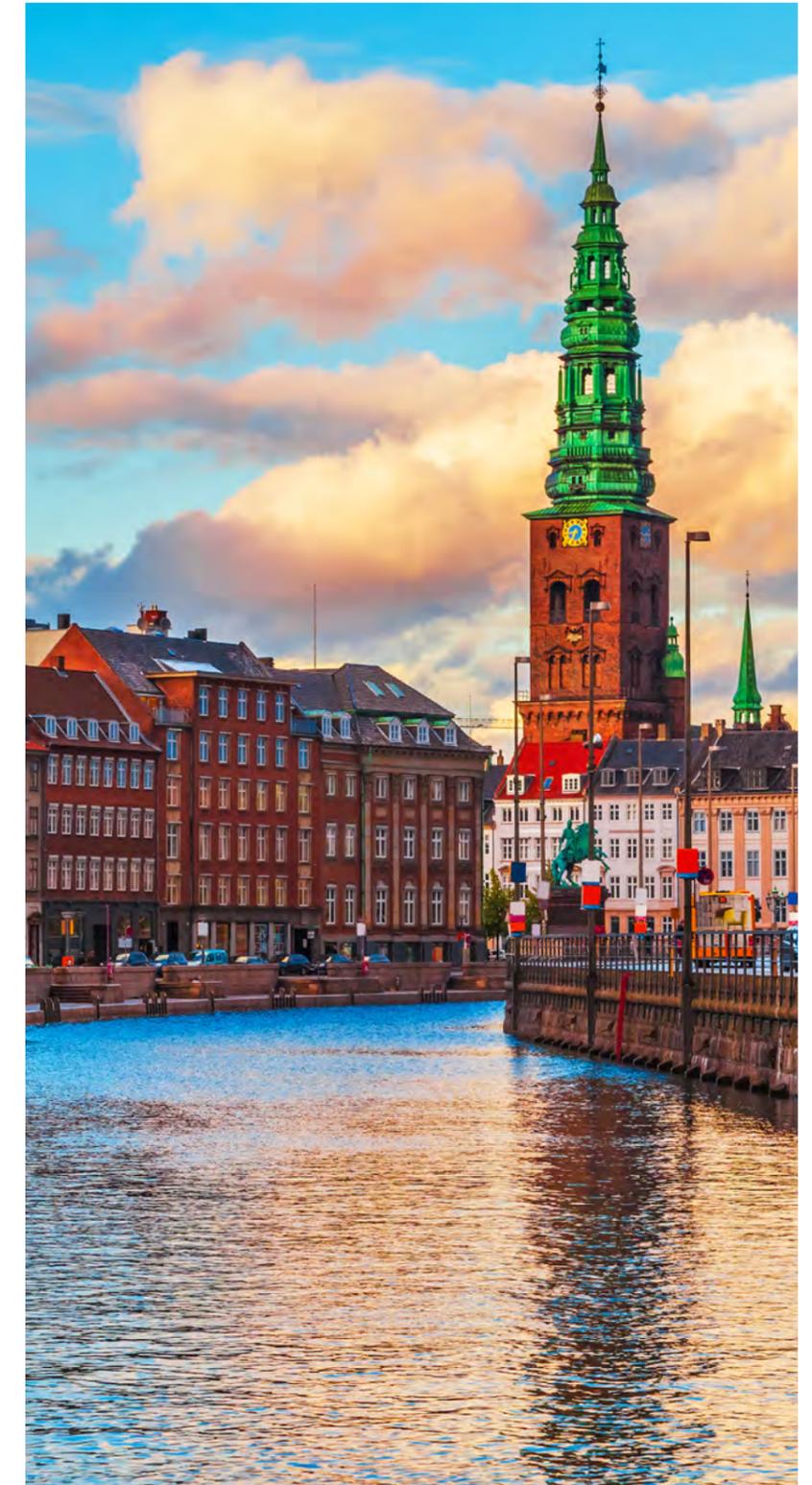
But young people the world over do acknowledge the highly desirable lifestyles of Western countries. Global rankings for 'An appealing lifestyle' show a clear preference.

Hence, while Gen Z and Millennials are undoubtedly more favourable towards countries such as Russia, China, and Turkey, the more established soft power leadership demonstrated by Western powers still holds considerable appeal and suggests that these countries will not give up their high overall rankings in the Global Soft Power Index easily or quickly.

### An Appealing Lifestyle

Rank	GenZ (18-23)	Millennial (24-39)
1	Canada	Switzerland
2	Switzerland	Canada
3	USA	Australia
4	France	Sweden
5	UK	USA
6	Australia	Netherlands
7	Netherlands	Italy
8	Sweden	Australia
9	Japan	France
10	Italy	Norway

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04

## Nation Brand Spotlights

### What does soft power look like around the world?

- Australia – The number 1 place to visit in the world
- Brazil – An enviable lifestyle celebrated by tourists
- France – Ranks 7<sup>th</sup> overall
- Germany – Interview with European Entrepreneurs
- India – Cultural diversity boosts soft power
- Ireland – Slipping down the ranks as Influence wanes
- Italy - Interview with Parmigiano Reggiano
- New Zealand – NZ Story on NZ's rapid rise on global media stage
- South Africa – Interview with Brand South Africa
- Spain - Interview with España Global
- Sri Lanka – SLASSCOM on the development of Sri Lanka's innovation and knowledge services sector
- Ukraine - Interview with The Ukrainian Institute
- UAE – Highest ranked nation across region
- Vietnam - Interview with VIETRADE
- ASEAN – Tourism gateway to the East



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

# Australia

Rank #10 ↑ #13

Score 52.2/100 +3.3



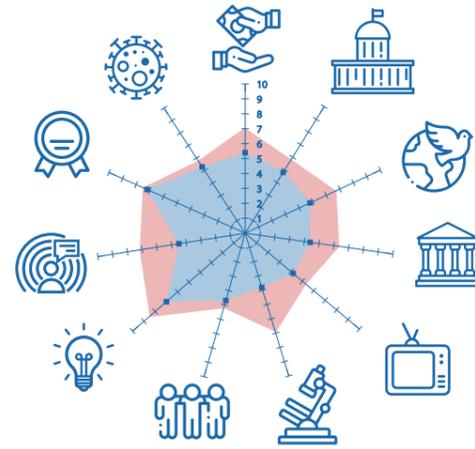
**Mark Crowe**  
 Managing Director,  
 Brand Finance Australia

Australia has performed strongly in its overall Global Soft Power Index score, rising 3 places to 10<sup>th</sup>, and celebrating a 3.3-point increase in its Index score, the highest increase among the top 10 nation brands.

Australia has retained its number one ranking as “a great place to visit” with an improved score. The nation has risen six places in the Culture & Heritage pillar, mainly through offering a very appealing lifestyle.

The successful management of COVID-19 has been acknowledged, although perhaps surprisingly Australia ranked only 11<sup>th</sup> best. In part, this can be explained by perceptions that other countries have had to endure a more challenging environment compared to Australia’s natural advantages of remoteness and being an island continent. Strong preventative measures, including the second longer lockdown in Victoria, along with strict quarantine measures, and differing state border controls did conversely elevate negative perceptions in terms of restrictions of movement and impact on the economy.

Australia continues to perform exceptionally well for Business & Trade. It is seen as easy



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to do business with, despite the current trade war with China. A strong stable economy and a high ranking for future growth potential provides the basis for future prosperity.

While Australia is perceived favourably for protection of the environment, its high rating for International Relations will be under pressure to provide a tangible commitment to zero target emissions by 2050, along with the potential threat of other countries imposing climate tariffs. This is a critical issue for an economy that is reliant on exporting natural resources including fossil fuels.

The strong reputation of Australia’s educational system, is increasingly being offset by flat scores for a lack of leadership in science and technology.

Australia enjoys an enviable reputation across several soft power attributes. It continues to perform well across its traditional strengths and has achieved a well-deserved top 10 ranking. The challenge is to leverage its soft power to ensure it is well placed to take advantage of a world in transition.





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

# Brazil

Rank #35 ↓ #29

Score 38.1/100 -1.3



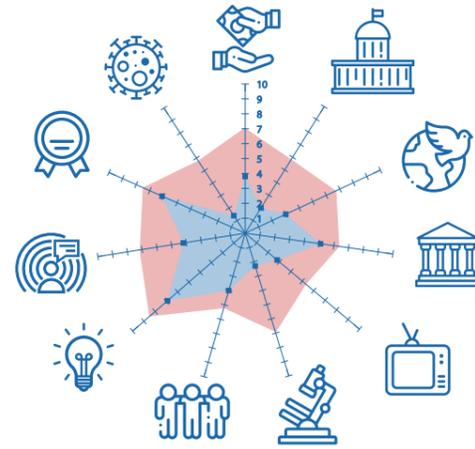
**Eduardo Chaves**  
 Managing Director,  
 Brand Finance Brazil

Despite ranking 12<sup>th</sup> among the largest economies in the world and being a G20 member, Brazil dropped in its overall Index score by 1.3-points year-on-year to 35<sup>th</sup> overall. This dip can be attributed to lower scores for Culture & Heritage and Governance – down 0.2 and 0.1-points, respectively.

While Brazil saw a slight dip in its Culture & Heritage score, the nation still ranked 8<sup>th</sup> overall for this metric, excelling in several variables such as art and entertainment, food, cultural tradition, lifestyle, and sports. Colonisation led to a national melting pot of cultures – mainly Portuguese and African – but also French, Dutch and Spanish, later followed by mass immigration of Italians, Germans, Turks, and Japanese. This diversity mixed with the native Brazilian culture culminated in a rich and diverse culture within the arts, music, entertainment, food, lifestyle, and sports.

Moreover, Brazilian artists hold their own on the international stage, from Tom Jobim's MPB to Anitta's 2021 New Year's Eve show in Times Square. Our cuisine is internationally awarded – from traditional Brazilian bean and pork food "feijoada" to Alex Atala's D.O.M. restaurant with 2 Michelin stars, and Brazil has been awarded prizes in international competitions such as the Olympics across several sports, including football and judo.

Unfortunately, an improvement of 0.7 points across the board for Business & Trade, International Relations, and Media



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& Communication, wasn't enough to raise Brazil's overall ranking in the Index.

While Brazil is a country rich in natural beauty, with the potential to greatly improve its position in the ranking, there are various factors holding it back, namely the chaotic response to the pandemic – from confusing statements by government officials, to problematic public health control activities. This was not aided by little investment in international promotion and communication action, a lack of representation in global brand rankings, as well as the need for technological innovation and products with higher market value.

Despite the nation's drop in the overall Index score, Brazil maintained perceptions of Influence and Reputation, scoring 22<sup>nd</sup> – up 0.2-points to 4.2 out of 10 – and 27<sup>th</sup>, up from 32<sup>nd</sup> with a 0.1-point increase to 6.1 out of 10, for these metrics respectively.

With a strong presence among several economic blocs – including Mercosur, the Community of Portuguese Speaking Countries (CPLP) and BRICS (Brazil-Russia-India- China-South Africa Group) – in addition to important international organisations, such as the United Nations – Brazil maintains global Influence and Reputation.

With beautiful beaches, mountains and rivers – as well as a year-round warm climate – Brazil has a lifestyle envied by other nations, and celebrated by tourists.





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

# France

Rank #7 ↓ #6

Score 55.4/100 -3.1

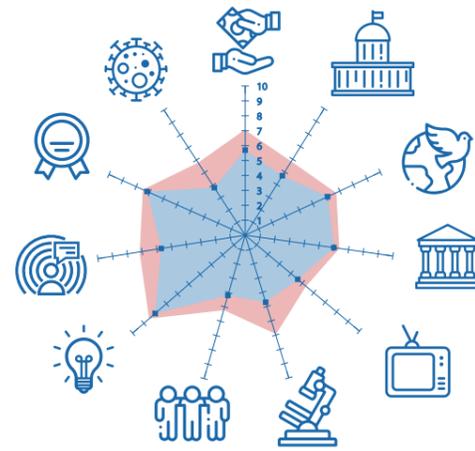


**Bertrand Chovet**  
 Managing Director,  
 Brand Finance France

Dropping one place since last year, France ranks 7<sup>th</sup> in the Global Soft Power Index 2021. With an overall Index score of 55.4 out of 100 (down 3.1 points), France is outpaced by Canada and Switzerland, but records a lower drop year-on-year than its peers, the UK, US, and China.

Scoring top marks in overall Familiarity and International Relations from both the general public and specialist audiences, the nation is also known for having award-winning Culture & Heritage – ranking 2<sup>nd</sup> overall for Arts & Entertainment, Food, and Tourism. It's not difficult to see why – with an appealing lifestyle, France inspires creativity, and Parisian culture is regularly embodied by leading luxury brands.

Despite being rich in Culture & Heritage, France is particularly resistant to change, which creates barriers in aligning with transformational objectives – both nationally and internationally. However, following initiatives from Bpifrance, Business France, and Atout France, Business & Trade is becoming more



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attractive, particularly regarding foreign investments.

As illustrated in the 2020 EY Attractiveness Barometer, France ranked first as the most attractive country for foreign investors in Europe. With 1,197 projects, up 17% year-on-year, it exceeds the UK with 1,109 and Germany with 971. However, this performance is not fully perceived by other nations, as its performance in the Business & Trade pillar within this year's Global Soft Power Index is slightly down.

Overall, France's reputation (7.2 out of 10) stays stable, but influence is declining. While France is standing up for Climate issues – capitalising on all the efforts of COP21 – it faces difficulty in mobilising other nations to tackle the fundamentals of a sustainable world and encourage the change.

Going forward, France must continue nurturing its Culture & Heritage, while pushing for better perceptions in Business & Trade, to avoid losing its soft power advantage in the future.





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

# Germany

Rank #1 ↑ #2

Score 62.2/100 +0.3

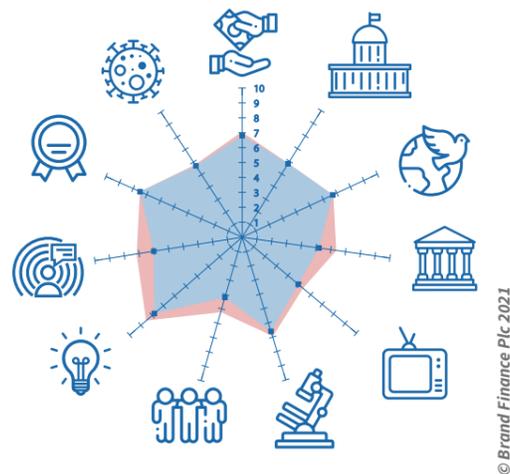


**Ulf-Brün Drechsel**  
 Managing Director,  
 Brand Finance Germany

Stability, steadiness, and accountability are the German virtues, which seem to pay off in the Global Soft Power Index 2021, the annual evaluation of 100 nation brands. While Germany only showed minimal gains in comparison to last year, the USA failed significantly and dropped to 6<sup>th</sup> overall. Additionally, China and Russia dropped to 8<sup>th</sup> and 13<sup>th</sup>, from 5<sup>th</sup> and 10<sup>th</sup> spot, respectively.

While Germany saw an increase of 0.3 points in Governance and International Relations, the nation's strongest step forward was in Education & Science, increasing by 0.8 points year-on-year. Low infection and death rates boosted Germany's boosted perceptions of Germany's response to COVID-19, with the nation scoring 5.7 out of 10 overall – a result in sync with Germany's gains under Governance and Education & Science.

Germany's balance of results in all categories of Soft Power places the



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nation in the driving seat this year. As one of the most eminent exporting nations, acting trade and industry companies can be seen as worldwide German brand representatives and soft power ambassadors.

One such company is Der Mittelstand (BVMW) – the largest voluntarily organised, cross-sectoral economic interest group for German SMEs, representing 3.5 million small and medium, privately-owned companies.

German SMEs are the industry engine for technology and innovation. For instance, BVMW unites 30 associations with more than 900,000 members under one umbrella, through 2,000 business events every year and 300 acting representatives globally, in 30 international offices. Over 99% of all companies in Germany are SMEs, providing more than half of all jobs across the nation. Additionally, out of 2,700 global innovation market leaders, nearly half are German SMEs.

# Interview with European Entrepreneurs



**Patrick Meinhardt**  
 Secretary General of Education Alliance of German SMEs, Vice-President of European Entrepreneurs and representative of the BVMW-Foundation

We spoke to Patrick Meinhardt, Secretary General of Education Alliance of German SMEs, Vice-President of European Entrepreneurs and representative of the BVMW-Foundation, to get his perspective on soft power in Germany.

## German brands are regarded as the gold standard when it comes to best-practice. How much does this contribute in the leading soft power position of Germany?

In my opinion, German SMEs make an enormous contribution to Germany's positive image and reputation. Through their activities – domestically and globally – German SMEs provide society with products and services that ensure wellbeing. It is a well-known fact that German companies produce high quality products, which are in great demand all over the world. German SMEs have had huge role in achieving this popularity.

Another important fact about German SMEs is their capacity to create vast numbers of jobs, which is key to boosting growth, reducing poverty, and increasing social cohesion. Moreover, one should not underestimate the innovative power of these SMEs – the better part of all patents in Germany originate from them.

Finally, a result of distributing comprehensive experience and democratic virtues, being classed as a German enterprise opens many doors in foreign countries as society places great trust in German SMEs. More than 80% of all German apprentices were trained in German SMEs - unrestricted by national borders, they are transferred globally, consequently strengthening the nation's soft power.

## One important category of the Global Soft Power Index is Education & Science. Germany has also improved to a leading position in this metric. Why?

The most important aspect is our dual and very flexible vocational education system. One part takes place in a vocational school, and the other part is an apprenticeship at a company. This establishes a deep connection between the SMEs and schools, and this practical way of learning is a major strength, therefore other countries have started to export this two-tier way of training.

## In 2012, the Minister of Economy, Philipp Rösler, started a marketing campaign to support German SMEs by launching a brand logo known as 'The German Mittelstand' which became a certification mark for innovative German companies. Would you encourage future governments to reactivate and promote this campaign by incorporating the Soft Power results?

It is undoubtedly very supportive when your government assists you in your activities through creative initiatives and projects, and ultimately leads to greater results. The initiative of former Minister Rösler certainly had a great impact in reinforcing the image of German SMEs. Nowadays, almost every businessman abroad has heard of this term and associates it with trust and quality. If one were to resurrect this initiative, it definitely would not harm the nation, but rather open new opportunities for future business.





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

# India

Rank #36 ↓ #27

Score 52.2/100 -3.9

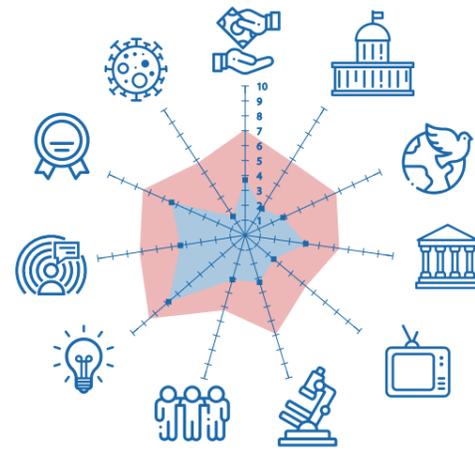


**Ajimon Francis**  
Managing Director,  
Brand Finance India

India's reputation has been in the spotlights since the start of the COVID-19 pandemic. On one hand, IT services, healthcare, and EdTech have been at the forefront of global development. At the same time, the effects of social media is dragging the nation's reputation the wrong way.

India has always been applauded for its large democratic system, its strong domestic economy, and emerging middle class. The cultural diversity, co-existence of dozens of languages, familiarity with English, and Indian workforce in all parts of the world means that India is never short of soft power.

For many decades, India's soft power has been felt but not fully recognised; right from the time of the Beatles' visit to India in late 1960s, the Dalai Lama seeking refuge in India, Steve Jobs finding his mojo in the foothills of Himalayas – after being expelled from Apple – the emergence of Yoga in the US led by Indian gurus, Indian dances and performing arts, historical monuments and epics, as well as Indian cinema and food. The Global Soft Power Index 2021 highlights the strengths of India in these metrics, with high ratings for being influential in arts and entertainment, a great place to visit,



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and a strong performance in the Culture & Heritage metric.

However, one of India's most underrated contributions is holistic healing. From Ayurveda and mental wellness to cutting edge medical and surgical capabilities, these are areas that lack recognition on a global scale.

In the post-pandemic economy, India being ranked 10<sup>th</sup> overall in easy to do business with is a welcome accolade – well supported by the billions of dollars of investments from Facebook, Amazon, and Google in the retail, telecoms, EdTech, and IT sectors.

With India's rising economic profile, new soft power resources have emerged. More specifically, India's foreign assistance to other developing countries, India's role in humanitarian and disaster relief operations, and the attraction of India as a higher education hub for developing countries in Asia and Africa.

Perhaps what this nation needs most to be welcomed by other nations is consistency and stability in policy making, governance, and tolerance to help create a sense of trust.





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

# Ireland

Rank #29 ↓ #24

Score 40.7/100 -2.3

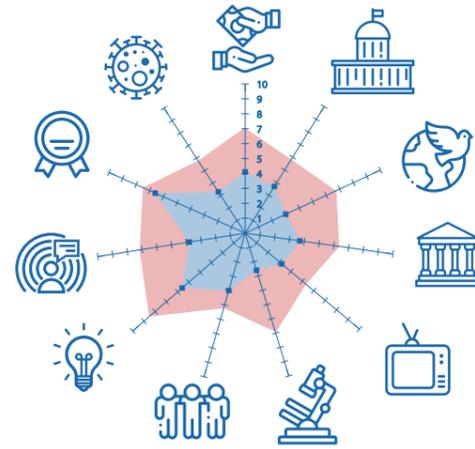


**Simon Haigh**  
 Agent,  
 Brand Finance Ireland

Despite having been elected to the UN Security Council in June 2020 for a two-year term, commencing on 1<sup>st</sup> January 2021, Ireland's Global Soft Power Index score has declined by 2.3 points this year to 40.7 out of 100, simultaneously slipping down the Index from 24<sup>th</sup> to 29<sup>th</sup>. The decline appears to be driven by three main factors - the addition of new nations to the Index, perceptions of the impact of Brexit on trade, and Ireland's management of the COVID-19 pandemic, particularly when compared to similar sized island nations, such as New Zealand.

In last year's Global Soft Power Index, we stated that Ireland 'punched above its weight', but with 40 new nations entering the ranking this year - many of which from Latin America and Africa, who are likely less familiar with Ireland and thus less likely to have a highly favorable view of the nation -Ireland's decline year-on-year is perhaps not surprising. Ireland's absolute scores have dropped, but not by a huge amount, but in an ever-competitive world others have improved.

Ireland's Reputation remains positive, with the nation's ranking actually improving one place from last year, up to 19<sup>th</sup> spot. The reduction in Ireland's overall Global Soft



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Power Index score is not because of any significant reputation issue or damage, but rather a decline of its broader Influence, and in 2020, the lack of any significant progress on key soft power pillars. Across the seven Soft Power Pillars, Ireland recorded drops in rankings across all of them, the most steeply in Culture & Heritage, dropping 1.1 points. Both tourism and culture have been hit badly by COVID-19, and thus Ireland's profile has slipped.

What appears clear is that Ireland's response to COVID-19 has not gone down well. In the newly added COVID-19 metric, Ireland ranks 47<sup>th</sup> overall, putting it behind the UK in 34<sup>th</sup> and France in 29<sup>th</sup>. In this respect, Ireland has underperformed against global expectations.

The impact of Brexit for trade may have had an impact too, with Ireland's score in the Business & Trade pillar down 0.5 points. Within this pillar, perceptions of the nation being easy to do business with and its strong and stable economy have also declined.

Going forward, it remains to be seen to what extent Ireland's seat on the UN Security Council will outweigh the effects of Brexit and COVID-19 throughout the year ahead.





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

# Italy

Rank #19 ↓ #11

Score 48.3/100 -1.0



**Massimo Pizzo**  
 Managing Director,  
 Brand Finance Italy

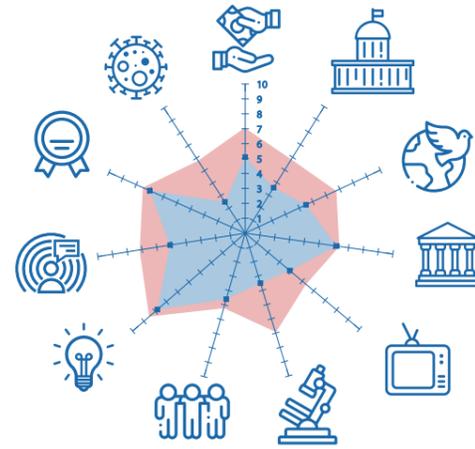
This year, Italy has dropped from 11<sup>th</sup> to 19<sup>th</sup> spot in the Global Soft Power Index, with an overall Index score of 48.3 out of 100. Dropping eight positions, Italy has recorded the greatest decrease in ranking within the top 30. However, looking purely at Index scores, Italy has only lost 1.0-point (the equivalent of 2% of its total score) and therefore, in this respect, the nation's performance is stronger than the US, France, China, India, and UK, which have weakened much more.

During 2020, Italy's scores have slightly increased across the Familiarity, Overall Influence, Reputation, Business & Trade, Governance, International Relations, Media & Communications, and Education & Science metrics.

Italy's drop in the Index is entirely due to the perception of the nation's management of the pandemic. This perception is the result of bad luck, management errors, a large gap between expectations and results, and poor communication skills.

Italy was the first Western nation to suffer heavily from the consequences of the pandemic. On 21 February 2020, the first COVID-19 patient, not directly attributable to China, was announced. From that moment, starting near Milan, contagion broke out in a large part of Italy, which led to the first lockdown on 9 March.

The primacy of the first Western outbreak of COVID-19 has brought worldwide attention to Italy, creating mixed feelings towards



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Italians. Italy has been mocked and garnered a lot of criticism, but also strong empathy.

Certainly, serious organisational errors have emerged in the management of the pandemic, but the misfortune of being the first Western nation to suffer heavily from the effects of the virus has not favoured quality choices. That being said, other important nations did not take advantage of what happened in Italy, falling into the same mistakes, with evident negative results demonstrated in the Global Soft Power Index 2021.

The balance of Italian Soft Power, like that of other major nations, is perceived negatively overall due to the disappointment of failed expectations. In fact, it should be noted that Italy is a nation with one of the best health systems in the world and the first outbreak occurred in Lombardy, one of the most organised and richest areas in the entire European continent.

Finally, the chronic inability of the Italian system to communicate effectively emerges clearly in crisis situations. The Italian government itself, aware of reputational issues, commissioned a tender in June 2020 for a communication campaign worth €50 million to relaunch Italy's image after the pandemic.

Unfortunately, the poor efficiency of the administrative machinery led to ineffective results; for example, the period between June and October was not exploited when the cases in Italy were absolutely lower than those in other dominant European countries.

# Interview with Parmigiano Reggiano



**Nicola Bertinelli**  
 President,  
 Consortium of  
 Parmigiano Reggiano



*The one and only.*

## What effect does Italy's reputation for delicious food, high quality products, and rich heritage, have on Parmigiano Reggiano as a popular cheese worldwide?

I think there is a symbiotic relationship between the reputation of Made in Italy and Parmigiano Reggiano. Made in Italy means excellence, tradition, and an eternal bond with a specific territory that is the Belpaese.

Mutually, Parmigiano Reggiano has always been an expression of its land of origin. Monks were the first producers of Parmigiano Reggiano, driven by the quest for a cheese featuring one main characteristic: to last for a long time. This feature has been Parmigiano Reggiano's fortune, resulting in it travelling around the world for centuries to become an authentic expression of what we call today the Made in Italy agribusiness. Parmigiano Reggiano is undoubtedly a traditional food but also one that is projected towards the future. It is an authentic precursor of current health trends thanks to its intrinsic qualities - naturally rich in nutrients and totally free from preservatives. What we call "Made in Italy" is the sum of many excellences and each brick is represented by a product, a craftsmanship, a tradition. Parmigiano Reggiano is simply all of this and is therefore inextricably linked to Made in Italy. They nourish each other.

## What role does having a Geographical Indication play in Parmigiano Reggiano's brand building and your reputation among key stakeholders?

Parmigiano Reggiano is a cheese with Protected Designation of Origin (PDO) status, i.e. a product that, based on its distinctive characteristics and its tie to the area of origin, is safeguarded by a system provided by the EU to protect consumers and producers alike. The EU's PDO symbols on Parmigiano Reggiano packaging provide consumers with clear and concise information about its origin and authentic, high-quality production processes. The PDO system also benefits the rural economy by boosting farmers' income and creating incentive for people to live in more remote areas.

Thanks to its PDO status, Parmigiano Reggiano is protected against: any misuse, imitation, or evocation; any other false or misleading information about the provenance, origin, nature, or essential qualities of the product; any other practice likely to mislead the consumer about the product's true origin; and commercial use of a registered name by products not covered by the registration if they are comparable to the authentic product or if their use exploits the reputation of the protected name. As established in 2008 by the European Court of Justice, only Parmigiano Reggiano PDO cheese can be sold under the "Parmesan" denomination in Europe. This historic regulation not only protects PDO producers, but also consumers, who are guaranteed authenticity and traceability by being protected from misleading names in the market. Unfortunately, the laws that classify and protect Parmigiano Reggiano within the European Union are not globally observed, as both Parmigiano Reggiano and "parmesan" can coexist on the same shelf in some countries outside the EU. These products are often mistaken for authentic PDO products by consumers.

## With Italy being severely hit by the pandemic at the beginning of 2020, how has the Italian government and Italian brands, such as yours, overcome these difficulties in order to prepare for the new normal?

The pandemic has not disrupted the activities of the Consortium. We immediately geared up to continue our quality controls to safeguard and protect consumers. We also continued our control activities on the markets with special focus on protection at the international level. To deal with the potential shortage of staff, the Consortium created a coordination network to make retired cheesemakers and former production workers available who were called upon by dairies in the interim. In that early stage, the Consortium of Parmigiano Reggiano worked closely with the Ministry of Agricultural Policies and the EU to safeguard the production chain. We obtained a few waivers from the Specification rules relating to the time needed to make the cheese.

Last spring, we also had to revise the global 2020 marketing plan in light of all the limitations we were experiencing due to the lockdown and in consideration of the coming phases of the pandemic. In the COVID-19 and post-COVID scenario, the consumer is increasingly looking for good and healthy products but also wants the way in which they are made to be "good". Hence the need to integrate traditional product communication with a new communication that we could define as "supply chain", highlighting the values that drive the choices of companies and which have a significant impact on environmental protection and food safety, and - more generally - on sustainability.



New Zealand's performance compared to best in class per pillar  
 ● Best in Class ● New Zealand's Results

# New Zealand

Rank #16 ↑ #22

Score 49.3/100 +5.9

## Praise for New Zealand's youngest female Prime Minister

With an overall Global Soft Power Index score of 49.3 out of 100, New Zealand is the fastest-growing nation in the Index, up six positions from 2020 and ranking 16<sup>th</sup> overall. The nation leads globally for its COVID-19 response, which has been lauded and envied worldwide.

Although New Zealand scores 7.0 out of 10 and ranks 10<sup>th</sup> overall in Reputation, New Zealand still falls short on Familiarity and Influence – despite an increase of 0.1 and 0.4-points, respectively. While New Zealand is celebrated for its lifestyle and considered by many as a great place to visit, the nation lacks clout and suffers from geographical remoteness, preventing it from wielding the same soft power levels as its European counterparts.

Despite a slight dip of 0.1-points, New Zealand scores highly in the People & Values pillar – ranking 3<sup>rd</sup> overall with a score of 4.8 out of 10 – as citizens are considered by most to be generous and friendly people. A result of the progressive leadership of Prime Minister Jacinda Ardern, the nation ranks 10<sup>th</sup> in the Governance pillar – an increase of 0.3-points to 5.1 out of 10 – with Ardern lauded on the global stage for her response to COVID, among other crises.

A land of beauty and adventure, New Zealand is home to incredible activities and ranks 24<sup>th</sup> overall in Culture & Heritage, with a score of 4.0 out of 10. However, COVID-19 border closures have disrupted tourism which serves as one of New Zealand's largest export earners.

In contrast, New Zealand's lesser-known exports such as food and beverages,

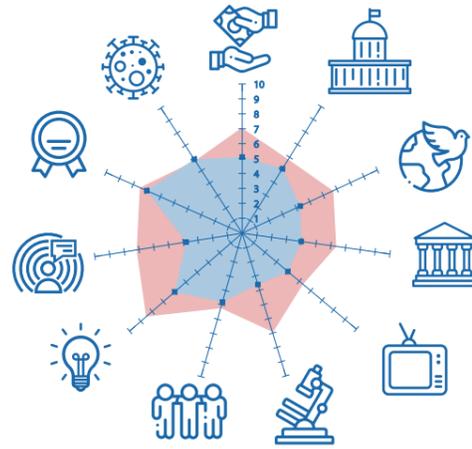
technology, gaming, and the creative industries have remained open for global business. The film industry – which like tourism benefited enormously from Peter Jackson's Lord of the Rings franchise – has seen New Zealand attracting international film and television productions even while international borders are closed and is home to many Emmy and Academy Award® winners.

## Society

Over 200 different ethnicities call New Zealand home and a quarter of all people who call New Zealand home were born overseas. New Zealand was the first country in the world where women won the right to vote, the first country that had an openly transgender politician, and now holds the title of the most rainbow Parliament in the world, where 10% of their MPs are openly gay, lesbian, or transgender. This diverse and open culture, combined with geologically fascinating landscapes and unique flora and fauna, make New Zealand an exciting country to explore.

## Māori Culture

Māori are the indigenous people of New Zealand. Their history, language and customs are central to the nation's culture and identity. The haka, perhaps one of the better-known elements of Māori culture, is a dance or challenge usually performed in a group and typically represents a display of a tribe's pride, strength, and unity. You may have seen New Zealand's Rugby team The All Blacks perform a Haka ahead of their matches. Frequently referred to as the world's greatest rugby team, the All Blacks are globally admired, and their fame has landed New Zealand 26<sup>th</sup> rank among the general public for the leaders in sport category.



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# Interview with New Zealand Story



**Rebecca Smith**  
 Director, New Zealand Story



## New Zealand's response to the pandemic received top marks from the General Public in the Global Soft Power Index research. What is the secret of your communications strategy?

We first need to acknowledge how fortunate we are geographically. But that said, decisive leadership was required. At the core of our response is a commitment to common values, the most important being the Māori concept of Kaitiakitanga – guardianship of people and our planet for future generations. This has allowed us to have a sense of collective responsibility ('team of five million') and encourage kindness in our daily interactions. We've also had clear and consistent messaging, such as the four Alert Levels, the New Zealand Covid Tracer app and daily briefings from the Prime Minister during lockdowns.

Our Prime Minister has been rightly recognised for her leadership. But government is more than one person. Our institutions have been tested and found to be robust – honed by many other recent crises. And finally, community involvement has been strong - from iwi (Māori tribes) and community groups to businesses and city councils. The overall effect has been high levels of trust and compliance.

## How have your plans for 2020 and 2021 had to change because of COVID-19? What projects or campaigns have you developed to address new challenges – especially in the key fields of tourism and trade?

As a group of agencies representing tourism, trade, and branding, we create a variety of messages but with a common, empathetic theme: that we care, we're here to help and we're ready to welcome you when international borders reopen. For tourism we kept the New Zealand brand in hearts and minds through a video campaign with messages of courage and support from ordinary Kiwis. For our tech and creative audiences, we showcased our ingenuity and that we're still open for business. For example, we're making films here for directors locked down in their own countries. And we have been launching satellites for global brands. Our food and beverage export sector could afford to be more proactive, promoting our produce as safe, fresh, and made with care. For our international students, we've told them we'll look after them while they're still here or look forward to welcoming their safe returns soon. We tailored the messages for our key markets to reflect their own COVID-19 experience and kept it all digital to reinforce the idea that while New Zealand is geographically distant, digitally we're only one mouse-click away.

## Thanks to Jacinda Ardern's universal appeal and New Zealand's track record on COVID-19, the global profile of New Zealand is clearly on the up. What are you doing to turn this momentum into lasting nation brand equity?

Brand equity is not something you can manufacture – it's earned by how you behave and the values you demonstrate. The international recognition is flattering but the pandemic has simply reaffirmed the importance of our values: integrity, ingenuity, and the Māori concept of Kaitiakitanga (guardianship). With the Covid-forced move towards doing business remotely, there has never been a better moment for New Zealand to show the world what we excel at. Across our New Zealand government agencies, we're looking at how we can translate this momentum into opportunities for our tech and innovation sectors, no longer constrained by geography, to tap into prospective customers. For our future visitors, we're working on how we can tailor our offering to harness our shores being a safe place to holiday and study, while also looking after our environment. But these are all by-products of first doing what's right. So, if the question is how we build on this momentum, it's simple: stay true to our values.



South Africa's performance compared to best in class per pillar  
 ● Best in Class ● South Africa's Results

# South Africa

Rank #37 ↓ #36

Score 37.2/100 +0.7



**Jeremy Sampson**  
 Managing Director,  
 Brand Finance Africa

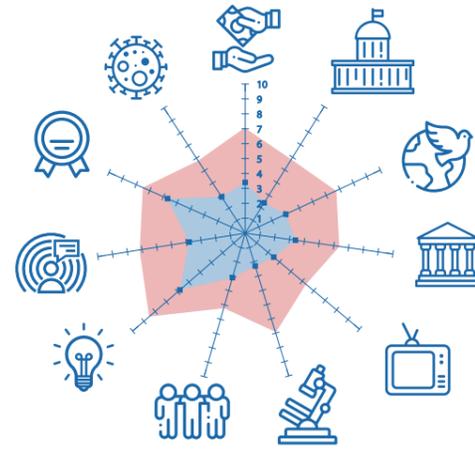
South Africa is a country of frighteningly good possibilities punching way below its weight. Being a young emerging country with a complex history brings many challenges, further complicated by the COVID-19 pandemic.

While the nation's economy – already regarded as 'junk status' by the ratings agencies – has experienced severe head winds, along with the rest of the world, the mining sector as a whole is enjoying the current commodities boom.

Mining could be even more viable if only government would slash the red tape holding back progress. At the annual Mining Indaba, the leader of the industry body said the relevant minister could release billions of Rand in development at the stroke of a pen. Agriculture has also made a strong showing due to favourable weather and rain at the right time.

However, the alcohol industry has taken a severe beating, with many producers either closing or staggering on. It was reported that around 50% of the entire 2020 vintage remained unbottled as at November. The wine industry has been locked down for no less than three periods over the last 12 months. However, the trade spat between China and Australia has resulted in wine exports from the latter all but ceasing, resulting in South African exports to China jumping by 50%. South African digital wine retailers have also blossomed, with many good brands discounted – value for money is world beating. That being said, the periodic alcohol bans had the unfortunate side effect of Anheuser Busch cancelling a much-needed promise of inward investment.

Another major source of employment and income is hospitality; the world class hotels, guest houses, restaurants, pubs and



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game parks, many situated in the most beautiful scenic geography – all severely impacted. Again, businesses have closed, are mothballed, jobs lost and the full impact still to be seen as the summer season comes to an end. For now, the Rand is reasonably strong against major hard currencies – meaning good value ideal for a holidays.

Europe remains a major trading partner, so the impact of Brexit still has to be gauged. Simply being on similar time zones has many advantages. Business goes on as Zoom, Teams and Skype have come into their own. Contact with colleagues worldwide in many cases are better today than previously. At last, Africa is moving away from its highly fragmented past with the creation of the African Continental Free Trade Area to be known as 'AfCFTA'. Over time, the benefits from this new trading block will be significant.

The big challenge will remain the pandemic. The uncertainty and new strains mutating at an alarming rate means the scientific world is heroically attempting to chase it down. To date only a handful of predominantly front line workers on the continent have been vaccinated as well as a couple of the former French territories in North Africa. There remains much uncertainty about procurement and roll-out, yet the expertise and infrastructure are in place. So the borders, for the most part, are closed.

South Africa is often accused of having an economy of "haves and have nots". At the moment, this is becoming a global phenomenon as vaccine nationalism raises its head. To tame COVID-19, the whole world will need to be vaccinated – and perhaps like the flu, we may require an annual jab to overcome the new versions that will emerge.

# Interview with Brand South Africa



**Dr Petrus de Kock**  
 General Manager Research,  
 Brand South Africa



**In this year's Index, South Africa is by far the highest ranked nation from Sub-Saharan Africa. Where do you see the focus of South Africa's soft power activity in the coming years as a regional leader – globally or on the continent of Africa?**

The soft power assets the South African Nation Brand has in its 'arsenal' are diverse, and resilient. Through several primary research engagements - in peer African markets, Asia, Europe, and the Americas - Brand South Africa has found that the country's profile, reputation, and influence are anchored in several aspects pertaining to its democratic transparency and free press, its diverse economy, and infrastructural base. However, towering head and shoulders above the forementioned factors, in terms of soft power influence (and brand association), is an agglomeration that emanates from the deep creative heart that beats in mountains, forests, deserts, cities, and towns of this country. The proverbial beat of South Africa's soft power heart lies in its people and the art, music (just think of the epic global influence South African jazz has had on ears around the planet!), film, entertainment, and the country's vibrant cultural scene.

**The past 12 months have been like no other. What projects or campaigns have you developed at Brand South Africa to address new challenges resulting from the COVID-19 pandemic – especially in the key fields of tourism, trade, investment?**

In response to the COVID-19 pandemic Brand South Africa supported the national effort aimed at curbing the spread. This took the form of awareness campaigns, and direct support of government and the private sector. During 2020, South Africa hosted the third annual South African Investment Conference (2020). In 2018, President Ramaphosa announced a five-year investment drive with the goal of attracting \$100 billion investment. The SAIC was successful in a year where global FDI dropped by an estimated 30-40%. At the 2020 SAIC a total investment commitment of R109.6bn were made. Investment pledges came from South African companies looking to expand operations to fully unlock regional potential under the African Continental Free Trade Area (AfCFTA). Domestic Investment continued to be vibrant making up 50.6% of the announcements. The foreign component was also strong, making up almost 49.4% of the total.

**In this digital age, we are witnessing how soft power tools can be leveraged for hard power purposes – with fake news, social media bots, and cyber-attacks the disappointing new normal of our online reality. Is it even worth playing fair?**

The deployment of soft power assets in 21<sup>st</sup> Century international relations, as well as the discourse on it, will increasingly have to engage with and understand that while perception may be reality, the grand battlefield of this century is already in the digital or virtual realms. If the exercise of soft power aims to convince, or quietly shift an audience or a country's decision/policy makers to a point of view favourably disposed to yours, then it is evident that such actions will most likely be taken in - through digital and other 'old tech' communications platforms (media, radio, television, etc). This means that your perception of the world could potentially become a sitting duck target for anyone intent on shifting opinion, changing perception, and ultimately alter someone, a country, or decision maker's reality.

While assets of hard power (Smart Bombs, UAV's, Robotic Dogs, and as small-as-a-fly spy machines) pose risks in material battlespaces, the risk in the domain of soft power is that humans might get lost and blown away in the info-war winds that blow in vast digital informational battlespaces. The question is whether information warfare campaigns aimed at having soft power effects (changing minds), are not pushing soft power ever closer to the invisible digitised domains of war. A type of war where the aim is to capture minds, and shape/alter realities through (dis)information, fake news, information war campaigns, and opinion manipulation, facilitated by impersonal and democratically unaccountable AI's, deployed by Digital Multinational Corporations that are seemingly even less accountable than their digital tools.



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

# Spain

Rank #22 ↓ #16

Score 47.5/100 -0.2

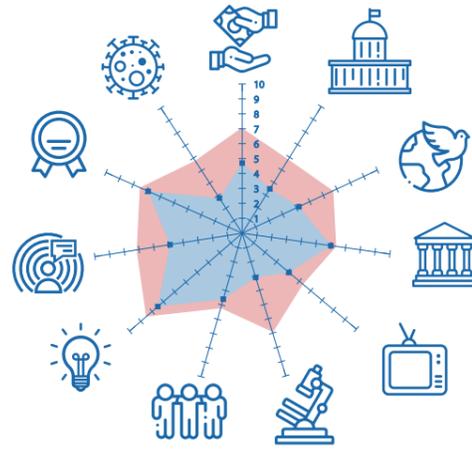


**Teresa de Lemus**  
 Managing Director,  
 Brand Finance Spain

Just like any business, Spain has the opportunity to set its own strategy. This strategy can be based on trying to reinforce its strengths or by tackling its weaknesses. Ranked 22nd in the Global Soft Power Index 2021, with an overall Index score of 47.5 out of 100, Spain has slipped down the Index compared to last year. However, there seems to be two areas where Spain excels and reaps rewards – for being fun and through its loyal Latin American audience.

Spain is a well-known nation, ranking in the top 10 for Familiarity. Familiarity is vital in developing a nation's positioning in the international arena. The nation is already known and perceived as fun; therefore, we encourage the nation to build upon this attribute to, in turn, boost its soft power standing.

First and foremost, fun should be properly understood in order to create a strategy around it. We are not talking about holidays, but the overarching sense of enjoying life – something that has become enormously relevant in current circumstances. Free time needs to be enjoyable. Spain could squeeze this opportunity, offering enticing packages to companies to establish their headquarters here. Brexit is a huge opportunity to establish Madrid as the



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centre of EU businesses and as a London substitute. Finding the right incentives could transform a 'fun' nation to one of the biggest business centres in Europe. If the 'fun' trait is also paired with the nation's superior educational system – no doubt Spain will attract students from the world over. The next step would be to ensure that there is a talent retention scheme in place, to persuade these students to stay in the country to work.

Spain has a strong and loyal audience – Latin America. Although many of these nations may not recognise Spain's influence on them, they do understand that Spain is a reputable nation. Products and services that are made in Spain – or even just embellished with the Spain stamp – have an open door into these markets. This influence could be one of the nation's top business strategies. Spanish companies that successfully leverage and use the Spain accreditation could use this as a building block to not only expand their global reach, but also to attract investment into Spain.

The Global Soft Power index is the most accurate tool to understand what the best strategy for Spain should be going forward. Understanding the nation's strengths and weaknesses from the data provides the opportunity for the nation to make value-based decisions going forward.

# Interview with España Global



**Manuel Villa**  
 State Secretary,  
 España Global



## What is the Secretary of State of España Global doing to communicate its response to the COVID-19 crisis to its citizens and key stakeholders?

We are working on two related plans. One strategic and one focused on communication. Bilateral meetings with other countries and the launch of the "Sentinel Network" are framed in the strategy, of which the Spanish embassies in the Member States of the EU and the Schengen Area are part, to transfer epidemiological information from Spain to its interlocutors, while collecting information on the status of COVID-19 management in these countries. In this plan, we add the participation of the Secretary of State in different international forums and think tanks.

Regarding communication, it has been proactively enhanced in interviews, press conferences and contacts with the national and foreign press through frequent briefings (the global number of briefings and press conferences of the Minister and Secretaries of State convened by the OJD in 2020 has amounted to 56 and the Minister gave 164 interviews to national and international media). Infographics, specific videos and messages for social media have been created, and the publication of news on the España Global website has also been encouraged, in addition to reporting on various topics related to the COVID-19 crisis, to convey a positive image of Spain.

## How have your plans for 2020 and 2021 changed due to COVID-19? What new interesting projects or campaigns have you carried out under blocking conditions?

The pandemic has influenced the change of formats. Where they were previously face-to-face, they have now become virtual or combined. In general, we have maintained the roadmap of all projects and reputational country campaigns have been promoted, such as 'For me, Spain is' or 'Spain for Sure', of which we are finalising a second phase.

We highlight that, in this time, we have developed an External Action Strategy of the Ministry of Foreign Affairs, which defines and responds to global challenges through international politics, with which our country is expected to gain more weight in global leadership. We are also developing other broad-based strategies, such as the first National Global Order Strategy, a reflection on the image to be projected called 'Diverse Spain' and action plans on the country's reputation. Likewise, we have deployed economic diplomacy relations as a priority line of work and reinforced other areas such as sports or gastronomic diplomacy, among many other lines of work.

## What are your goals for the next decade in terms of developing your nation's soft power capabilities?

The objectives are included in the 2021-2024 External Action Strategy (EAE), which is being debated by the Congressional and Senate Commissions.

The EAE articulates the action that Spain will develop based on a series of values and principles that give coherence to our foreign policy and will allow our country to project the values of democracy, freedom, peace, equality, justice, respect for diversity and progress that characterise us.

Based on these, action will be taken on four axes: promotion of human rights, democracy, safety, as well as feminist diplomacy and diversity; economic diplomacy, to decisively promote a new global socio-economic model, based on the principles of integration, justice and equity; climate diplomacy, for the defence of a more sustainable planet, habitable and green; and multilateral diplomacy, to improve global governance and promote greater regional integration and renewed and reinforced multilateralism. Likewise, for the defence and projection of the image of Spain, a Country Reputation Action Plan will be carried out.



Sri Lanka's performance compared to best in class per pillar  
 ● Best in Class ● Sri Lanka's Results

# Sri Lanka

Rank #70 NEW

Score 31.1/100



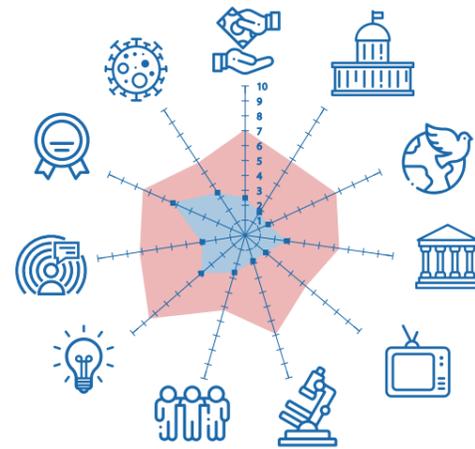
**Ruchi Gunewardene**  
 Managing Director,  
 Brand Finance Lanka

Sri Lanka is a new entrant to the Global Soft Power Index, coming in at 70<sup>th</sup> place out of 105 nations in the study. It is the highest-ranking new entrant from Asia, at 12<sup>th</sup> position on the continent. The nation performs exceptionally well on Culture & Heritage, ranking 7<sup>th</sup> in Asia – ahead of Indonesia, Vietnam, Malaysia, and 8<sup>th</sup> on how effectively it managed COVID-19. Sri Lanka ranked in the middle of the pack for other attributes such as Business & Trade and Governance compared to its counterpart Asian countries.

The Index reflects Sri Lanka's core strengths: its friendly people, rich heritage and strong culture aligning with what it is best known for – a tourist destination. These are the very reasons it is consistently ranked high in travel magazines and websites, being among the most sought-after destinations to visit in the world.

One of the many unfathomable mysteries of Sri Lanka is how it can squeeze so much diversity into a small island.

From the palm-fringed beaches that circle the tiny island to the picturesque highlands covered with tea plantations, home to the world-famous "Ceylon Tea". The country boasts over 2,500-year-



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old historical kingdoms blended with Portuguese, Dutch and British influence, all of which sit alongside the stylish, modern, contemporary architecture of boutique hotels dotted across the nation.

Sri Lanka has as many as seven world heritage sites, with diverse crops and a wide range of spices, flora, and fauna that host the most extensive land and sea mammals – which can be found within less than a hundred kilometres from each other. All of this makes a rich tapestry and treasure island to explore for foreign travellers.

Situated in the middle of the Indian Ocean, between Africa and the Far East, Sri Lanka has long been a trading sea route from ancient times. While its Soft Power on Business & Trade is relatively low, it records a positive score on the future outlook metric. In this regard, there is a big thrust on developing the ports across the country, and a massive modern infrastructure is emerging – called the Colombo Port City – on over 500 acres of land reclaimed from the sea.

The Soft Power of this strategically located tropical island in the middle of the Indian Ocean lies on the two key pillars of tourism and trade, which are pivotal for the country's future.

# Interview with SLASSCOM



**Channa Manoharan**  
 Chairman, Sri Lanka  
 Association for Software  
 and Services Companies  
 (SLASSCOM)



## Sri Lanka is known primarily as a tourist destination. How do you expect the innovation and knowledge services industry to get attention in the context of these perceptions?

For the past two decades, the innovation and knowledge services sector has built an enviable track record of attracting MNCs and large IT companies to set up their digital innovation labs and captive delivery centres in Sri Lanka.

Sri Lankan IT product companies have delivered world-class products and platforms to some of the global brands, while companies who provide software and knowledge services have focussed on high value niche areas. We are now at a tipping point where we are actively ready to market our capabilities to the world. Everyone knows that India is the largest offshore outsourcing market. Being a neighbour, we believe that we can attract more specialised work requiring relatively smaller teams to be delivered from Sri Lanka. The pandemic and weather-related work disruptions – such as the floods in Chennai – are also reasons for MNCs and Indian majors to set up in Sri Lanka for business continuity purposes. We are also strategically positioned as a gateway to the fast-growing South Asian markets, having friendly relations with India, Pakistan and Bangladesh.

Sri Lanka is a desirable place to visit and live, with its cosmopolitan lifestyle, modern infrastructure, diverse culture – influenced by Dutch, Portuguese, and British presence – its clean environment, sandy beaches, lush greenery and biodiversity, as well as its warm and friendly people. Global customers can establish business relationships while combining leisure and travel – at some point in the future... while sipping our tea!

## What are the challenges in establishing Sri Lanka as a viable centre to export its knowledge?

We have all the right ingredients in place. Our primary challenge has been country visibility for innovation and knowledge services. While our industry has created a niche position for its innovation and knowledge services, no significant investments were made to market it to the world. Global analysts such as AT Kearney and customers worldwide call us 'a hidden gem'.

We have an outstanding reputation and track record of delivery with our current base, and we have some major global operators doing business in Sri Lanka. These include well-reputed companies such as the London Stock Exchange – which uses Sri Lanka as its innovation centre and service delivery for its global operations – and HSBC which has a captive delivery centre in Colombo. Pearson, IFS, Sysco Labs, Wiley Publishing, Axiata Digital Labs and Acuity Knowledge Partners are others who have established their captive innovation and delivery centres here. We have recently launched the industry brand 'Island of Ingenuity' which espouses our value propositions. We plan to build awareness for our industry in identified priority markets in the next five years with government support.

## What is your future outlook?

The industry has a shared vision with the government to build the industry to US\$5 billion in export, create 200,000 high-value employment, and launch and support 1000 startups. This will include FDIs, venture capital, foreign exchange earnings through exports, resulting in significant socio-economic growth impact.

We have recently launched accelerators in Products & Platforms, Artificial Intelligence, Cyber Security, and Intelligent Process Automation with the aim of positioning Sri Lanka as a Center of Excellence in these areas. We work closely with universities and academia to create a future-ready workforce in emerging technologies. The innovation and knowledge services industry in Sri Lanka has embraced diversity, regional inclusion, environmental sustainability and social responsibility. It has demonstrated resilience and adaptability in challenging situations and has emerged stronger. We are confident in achieving our goals with the government's vital support in promoting the industry and enabling conducive policies.



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

# Ukraine

Rank #61 ↓ #46

Score 31.9/100 +0.2

Ukraine's performance in the Global Soft Power Index 2021 is stable, with an overall Index score of 31.9 out of 100, up 0.2 points year-on-year. However, due to the expansion of the Index and improved relative performances of the other nations, Ukraine has dropped 15 spots, ranking 61<sup>st</sup> overall.

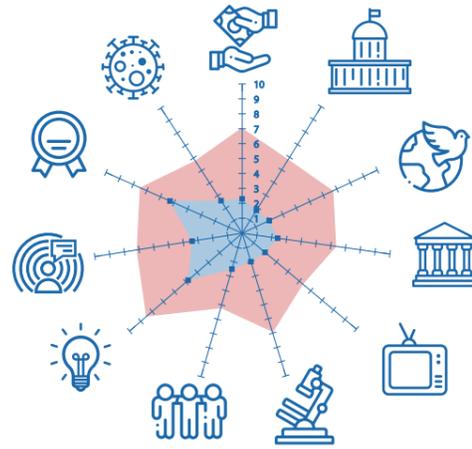
The general public perceives Ukraine as a nation with friendly and trustworthy people, with a strong educational system, and open to international business and trade. Over the course of a year, Ukraine's Overall Influence has marginally improved, up 0.1 points, ranking 45<sup>th</sup> in this metric. A similar trend is observed among most of the Eastern European and post-USSR nations, with Russia being the only exception, dropping 0.1 points in this metric.

In addition to an improved Overall Influence score, the nation's performance on the Education & Science pillar has also increased, with Ukraine's strong educational system being one of the main drivers behind this improvement. For many years, Ukraine has been a go-to

destination for students from all over the world, from countries including Iran, India, and Morocco.

From an economic perspective, Ukraine keeps improving its identity as a nation open to international business and trade. The nation ranks well within the top half for its future growth potential and recent legislative reforms in the areas of land and finance are the key markers of readiness to realise this potential. There is space for improvement, however, with the nation perceived as less easy to do business with than last year. This correlates with the view of security and leadership in the country, given the current political and global environment.

Overall, Ukraine has managed to rank significantly above other post-Soviet nations in the Index – including Azerbaijan (72<sup>nd</sup>), Kazakhstan (75<sup>th</sup>) and Uzbekistan (81<sup>st</sup>) – but there is still a considerable amount that needs doing in the areas of Governance and International Relations to ensure that the nation is a leader in the Eastern European bloc.



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# Interview with the Ukrainian Institute



**Volodymyr Sheiko**  
 Director General,  
 Ukrainian Institute



## COVID-19 has created unprecedented challenges for the world of culture. How have you adapted your programme to showcase Ukrainian culture in a socially distanced world?

On top of cancellation or postponement of most projects, the Ukrainian Institute, like other culture organisations in Ukraine, has also faced increased pressure to deliver its programme within the remainder of the fiscal year, and multiple instances of re-planning in response to changing travel and lockdown restrictions in other countries. The most evident challenge for us was a lack of personal contact and direct engagement with people in other countries, which is crucial for cultural diplomacy. To address this challenge, we transferred many offline events (in film, literature, theatre and music) into online or hybrid offline-online formats.

For example, our music showcase at Waves Vienna was produced, filmed, edited and streamed from Kyiv to an international audience of 60,000 people. We supported online participation of Ukrainian filmmakers and producers at the industry events of the Cannes Film Festival. Our theatre programme combined 'theatre-in-cinema' formats with outdoor immersive performances. By amplifying projects digitally, as well as launching digital-only formats (a MOOC course about Ukraine, viral video explainers and VR project) we reached much wider audiences both in Ukraine and abroad. We took care to ensure the safety of our team, digitise paperwork where possible, and improve partnership and risk management processes. Maintaining a safe, productive and reliable working environment for the team, with internal communications remaining a priority.

## Ukrainian culture is well-known in Europe and North America, but perhaps less so in other parts of the world. Is it more important to focus on audiences already familiar with you, or on introducing what Ukraine has to offer to new ones?

In the past year, we conducted a series of surveys about perceptions of Ukraine among professional audiences in France, Germany, Poland, Hungary, USA, Turkey and Japan. Our initial observation is that Ukrainian cultural phenomena are not very well-known in most of these countries, and our respondents' knowledge about Ukraine has been defined by the nature of their personal Ukraine-related work experience.

Ukrainian culture is still far from being general knowledge among the public in Europe and North America, and we still have a lot of work to do to spread this knowledge and to re-appropriate our cultural heritage associated with other countries. I believe we need to work with both niche and wider audiences, including those who do not know Ukraine much, those who do and have a positive attitude, and those who have a negative attitude or are driven by stereotypes. We must maintain connections with loyal audiences, offer positive narratives to those who perceive Ukraine negatively, and introduce neutral audiences to the Ukrainian context by offering them unbiased and diverse information.

## With such a variety of projects and campaigns developed in just a few years since the foundation of the Ukrainian Institute, but also significant tasks ahead of you, what are you most proud of and what is your main goal for the next 5 years?

We have developed a five-year strategy that gives us a clear pathway aligned to the foreign policy priorities of Ukraine. In just two years, the Ukrainian Institute implemented over 170 projects and events in 14 countries. In 2019, the Institute and the Ukrainian Embassy in Vienna co-organised the Bilateral Cultural Year Austria-Ukraine. In a very short time, we created a new institution from scratch, and brought together a highly professional and motivated team of experts. Through our work, the Institute and its partners raised the public profile of cultural diplomacy in Ukraine as a factor of national security and foreign policy. For the next five years, our goals include expanding the Institute's activities to new regions and countries, opening at least three international offices, and diversifying our funding and partnership network. Hopefully, this will help Ukraine move up in the Global Soft Power Index in the years to come.



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

# United Arab Emirates

Rank #17 ↑ #18

Score 48.4/100 +2.4

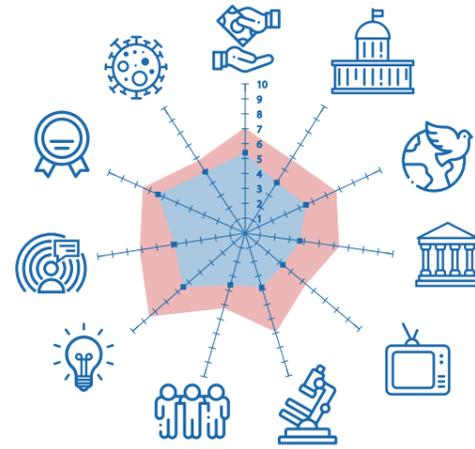


**Andrew Campbell**  
 Managing Director,  
 Brand Finance Middle East

The United Arab Emirates is the Middle East's highest ranked nation in the Global Soft Power Index, with an overall Index score of 48.4 out of 100, up 2.4 points from 2020. Climbing one spot in the Index to 17<sup>th</sup>, the UAE is comfortably ahead of its neighbours, with its closest rival Saudi Arabia sitting in 24<sup>th</sup> (44.2).

This improvement is largely attributable to higher scores across the Governance (up 7 places to 18<sup>th</sup>), Education & Science (up 5 places to 19<sup>th</sup>) and People & Values (up 19 places to 24<sup>th</sup>) pillars. The UAE has recorded the greatest increase in the Governance pillar in the top 20 (up 0.8 points), as perceptions of its political stability vastly improve, with the general public scoring the nation particularly high for its respected leadership, safety and ethics.

2020 was a pivotal year for the young nation - channelling the spirit and vision of founder Sheikh Zayed bin Sultan Al Nahyan - in pursuing its mega growth ambitions. Perhaps most noteworthy, and an event that hit the global media by storm, was the successful Emirates Mars Mission. The EMM is a clear example of the nation punching above its weight, entering the race with global heavyweights China and the US, also forming an integral part of the nation's



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journey to diversify its economy, and to becoming a new central hub for science and technology. The UAE has jumped five spots in the Education & Science pillar and celebrates strong improvements in being recognised for its leading-edge technology.

The UAE boasts high levels of Influence - 12<sup>th</sup> in the world - far higher than the majority of other nations of similar size and overtaking KSA in this metric this year. The nation's historical move to establish diplomatic relations with Israel - the first Gulf Arab state to do so - was a significant advance in Arab-Israeli relations and a move that the UAE hopes will mark the start of prosperous growth in the region and has no doubt contributed to the nation's increased Influence and Familiarity.

The nation's world-class brands are helping spearhead global transformation across their respective industries - from ADNOC's innovation in sustainability, Etisalat's accomplishment becoming the fastest network globally, DP World's position as a leader in logistics to Emirates flying the flag - quite literally - the world over. The UAE is continuing to promote the nation as the gateway to the region and will be hosting the world at Expo2020, as it opens its doors to over 190 nations globally.





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

# Vietnam

Rank #47 ↑ #50

Score 33.8/100 +2.5



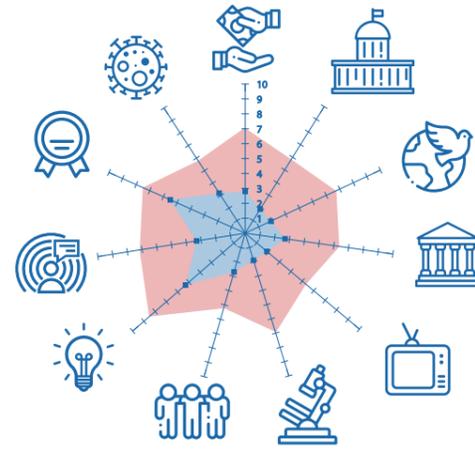
**Samir Dixit**  
 Managing Director,  
 Brand Finance Asia Pacific

The historical way of managing soft power through strong individual personalities and political diplomacy are no longer relevant. Soft power today is about a sum of perceptions across all stakeholders, be it consumers, corporates, media, global policy makers, investors, leadership of other countries, and so on.

Economic growth in the 21<sup>st</sup> Century is all about sustained collaborations among various stakeholders and the correlation of perceptions of the nation brand with the brands from the country, which can truly enhance the country's soft power – both internally and externally.

Vietnam seems to have managed all aspects of its perception quite well. Especially the integration and alignment of its nation brand and the brands from the country. The Prime Minister Nguyen Xuan Phuc approved the Vietnam National Brand Program from 2020 to 2030, which aims to increase the value and rankings of the nation brand while targeting over 1,000 products to become strong national brands. The brands from the country are managed through specific efforts and initiatives undertaken by Vietrade, under their nation mark program "Vietnam Value".

At a national level, Vietnam had established diplomatic relations with 187 out of 193 member states of the United Nations and completed the process of negotiating and signing new-generation FTAs - including the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and the EU-Vietnam



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Free Trade Agreement - making the country an important factor in all regional and intra-regional economic links, which is a booster for Vietnam's imports and exports.

At the same time, the "Vietnam Value" program management agency and the Ministry of Industry and Trade of Vietnam (MoIT), has actively supported Vietnamese enterprises to improve their capacity through consulting business development, establishing information systems, and updating branding knowledge. All these initiatives and efforts have helped increase the awareness of the public, international consumers, and customers about the Program and Vietnam Value products through various domestic and international media channels.

Meanwhile, the MoIT also focuses on building and promoting geographical indications and collective marks of Vietnam in foreign markets; supporting to improve the competitiveness of businesses based on quality reputation, environment-friendly production, and professionalism, thereby contributing to consolidate the position of Vietnamese brands in the world market.

Thanks to the efforts of the "Vietnam Value" program, Vietnam's processed food industry now contributes upwards of US\$17 billion of Vietnam's exports. The apparel industry makes up over US\$22 billion of Vietnam's exports. These economic contributions are absolutely crucial for Vietnam's overall growth, its reputation and contribution to Vietnam's soft power.

# Interview with VIETRADE



**Mr. Vu Ba PHU**  
 Director General,  
 Vietnam Trade Promotion  
 Agency, Ministry of Industry  
 and Trade of Vietnam



## Vietnam is going through a growth spurt. What role does soft power play for its GDP growth and success in the region and globally?

Vietnam's soft power stems from not only the inheritance and promotion of its own values – including the heroic history, tradition, culture, and peace-loving foreign policy - but also the development and optimization of its new position and advantage. In the difficult context of 2020, the successful "dual role" performance of Vietnam, as both ASEAN President and non-permanent member of the UN Security Council, is a testament to the harmonious application of soft power in Vietnam's multilateral and bilateral diplomatic relations.

Vietnam is one of the most open economies in the world, with the ratio of trade to GDP increasing from 136% in 2010 to approximately 200% in 2019. Amid COVID-19 shutdowns, causing outputs to slump in early 2020, Vietnam was among a very few number of countries to achieve positive GDP growth - of nearly 3%.

## Brands from the country are a strong tool to drive advocacy with global stakeholders. How is Vietnam globalising their homegrown brands?

In a modern and continuously evolving economy, the more the homegrown brands of a given country dominate the international market, the stronger that country becomes. Notably, branding will play a crucial role when Vietnam participates in more new-generation Free Trade Agreements.

Recognizing the importance of branding to a country in the globalization process, in 2003, the Vietnamese Government launched the 'Vietnam Value' Program – a unique and long-term trade promotion program. The aim is to build Vietnam's image as a country home to high-quality products and services, to increase pride and attraction of the Vietnamese country and people, and to boost foreign trade and national competitiveness.

Thanks to the support of the Program, many Vietnamese enterprises have gradually created, developed, and promoted their brands professionally, thereby improving their competitiveness and affirming their position in the domestic and foreign markets. Many outstanding brands of Vietnamese enterprises have resonated in the regional and international markets. For example, Viettel - Vietnam's largest Telecommunication and Information Technology Corporation – is in the top 15 corporations in the world in terms of mobile subscribers and top 40 in the world in terms of revenue. Truong Hai Auto Joint Stock Company (THACO) is gradually rising to the top position in the ASEAN region. State-owned Khanh Hoa Salanganes Nest One Member Limited Liability Company takes first place in Asia in terms of swiftlet exploitation output. TH Milk Joint Stock Company is the first Vietnamese enterprise to successfully penetrate the Chinese market - the second largest dairy consumer market in the world.

## How has COVID -19 impacted Vietnam's relationships globally? Has your soft power been impacted positively or negatively due to the pandemic and why?

The COVID-19 pandemic is increasingly serious, complicated, and unpredictable with extensive and far-reaching impacts, pushing many countries into a two-pronged health and economic crises.

Vietnam is well known as a safe country. This popularity makes it easy for Vietnam to draw international investment, events, and tourists, which brings great opportunities for the country's economic development. Not only that, Vietnam has succeeded in turning the challenges of the COVID-19 crisis into opportunities to promote and enhance the image of Vietnamese products and national brands.

## What are your goals for the next decade in terms of building up Vietnam's soft power capabilities?

In order to build up and promote its soft power, first of all, Vietnam needs to undertake a strategic orientation for systematic and long-term soft power promotion in the digital era. Secondly, it is necessary to improve growth quality and labor productivity, and to promote creative industries - thereby improving the competitiveness of the economy. Thirdly, to continue to preserve and promote the diversified and rich values of Vietnamese culture. Fourth, diplomacy should concentrate on enhancing capacity and asserting the role of "pivotal, leading and mediating" in the region and international affairs. Fifth, focused investment for science and technology development needs to be prioritized.

In addition to building and promoting soft power, Vietnam also needs to strengthen and accomplish its hard power to create a synergy – "smart power" -to demonstrate the nation's new geo-strategic and geo-economic position.

# Association of South East Asian Nations



**Samir Dixit**  
Managing Director,  
Brand Finance Asia Pacific

The Association of South East Asian Nations (ASEAN) has been in existence since 1967, consisting of its 10 member nations of Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand, and Vietnam. The region boasts a strong variety of demographics, government structures, stages of development, as well as race, culture, religion, and language.

Despite being a region of rich diversity - home to 650 million people - the combined efforts of the region in terms of soft power leave a lot to be desired. With the notable exception of the city state of Singapore, ASEAN has fallen short of its Asian peers. With only a handful of truly global brands emerging from ASEAN, the region is largely dependent on political alignments, trade deals, and individual views to establish and grow their soft power.

However, there remain two intertwined avenues of exchanges where this region does exceptionally well - Culture & Heritage and tourism. Both of these have been unknowingly at the forefront of the region's potential to promote soft power. However, a shift to measure the soft power contribution for tourism versus simply tracking tourism numbers and tourism receipts must take place.

Soft power growth contribution by various stakeholders, especially the tourism departments in the country must become a critical KPI measure and a focussed agenda for governments across the ASEAN nations.

Being an equatorial paradise situated at the heart of Asia, with cosmopolitan cities, pristine beaches, natural wonders and diverse flora and fauna, its appeal has not gone unnoticed by travellers across the globe. Its rich culture rivals that of the Asian hegemony it is flanked by, and the region also boasts of a multitude of UNESCO world heritage sites as well as articles of intangible heritage.

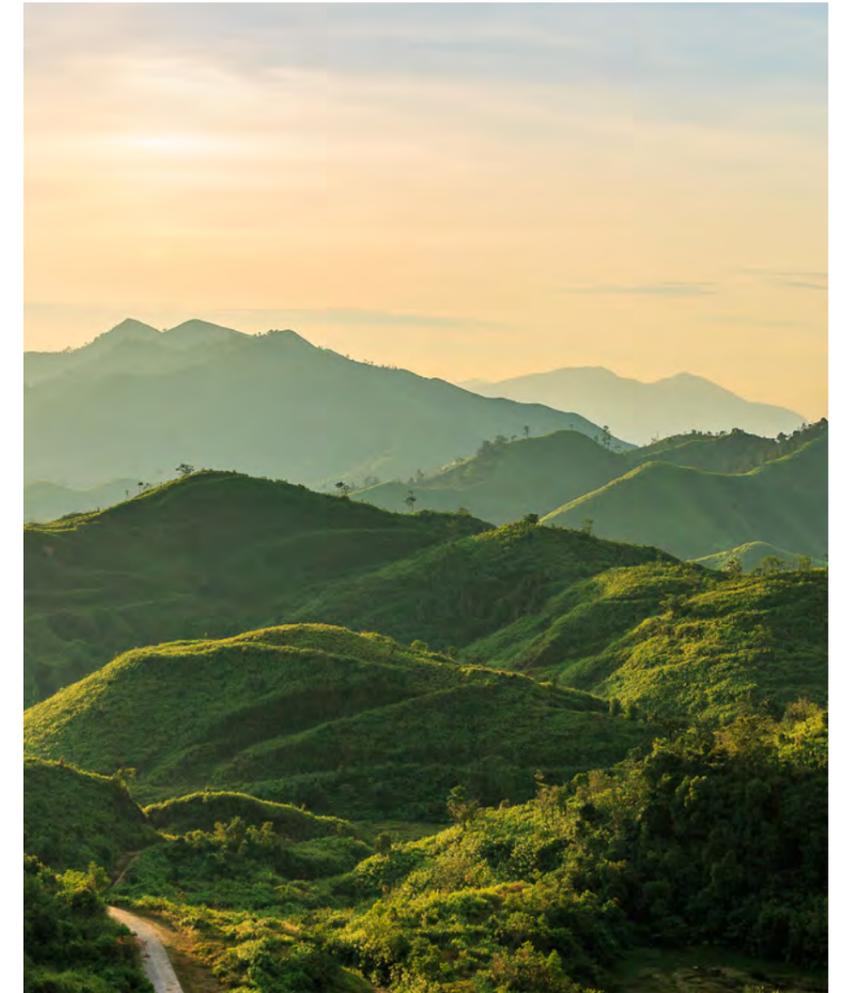
Therefore, this region has for years had an appeal as a tourist destination for every demographic, catering to a variety of interests, age groups, socio-economic strata and cultural disposition. This can be observed clearly among the general public, which rank countries such as Thailand and Singapore the same as Japan and South Korea as great places to visit in Asia.

Strong investments have been made in tourism across most countries and has led to the sector being one of the cornerstones of the regions' GDP. A catalysing effect to the sector has been the strong and robust connectivity between countries, offering travel options at every price point. The airline networks in this region have been exceptionally strong offering both budget and higher end options to a multitude of destinations in each country, leading to travellers often visiting more than one country when in this region.

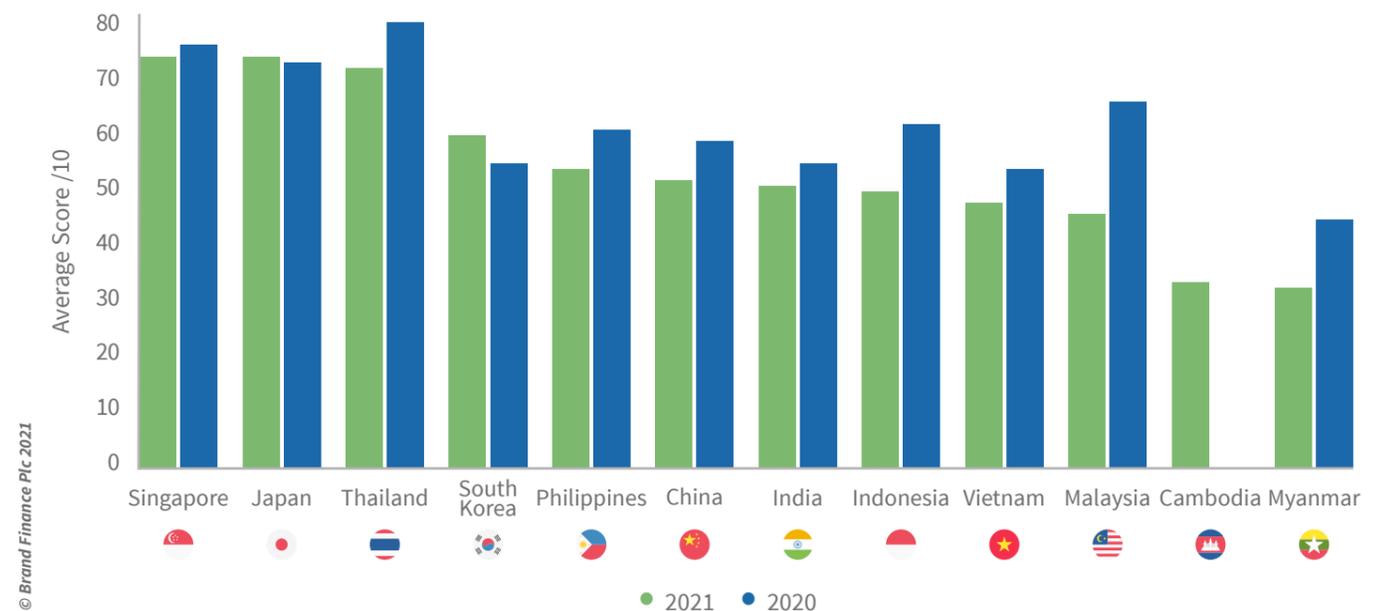
These contributions now stand the risk of being lost as the world continues to battle COVID-19. As governments have undertaken measures such as lockdowns,

quarantines, and suspension of visas on arrival, tourism has come to a screeching halt. As critical as this sector is to the economic well being of the region, the renewal of this sector is also important to restore lost soft power. Countries such as Malaysia, Indonesia, and Myanmar have lost significant appeal among the general populace as great places to visit since the onset of the pandemic this year, whereas countries such as Singapore have not. This could be a clear reflection of the ability of these countries to fight the pandemic having a spill over effect on the confidence of travellers to return to these countries should travel reopen.

Countries of ASEAN are at different stages of fighting the pandemic and an end appears in sight with the availability of vaccines improving by the day. As countries rebound and begin opening their borders once again, the bloc would benefit greatly by working together to renew tourism in the region. The symbiotic nature of regional tourism would not only be mutually beneficial in regenerating local economies, but also revitalise the ailing aviation sector which has suffered the most debilitating effects of the pandemic.



## A Great Place to Visit



## What do the experts say?

- David L Heymann M.D - The Soft Power of Public Health
- George Yeo - The Impact of COVID-19 on Soft Power in Asia
- Carl Bildt – Sweden’s Approach to the Pandemic
- Professor Joseph Nye – American Soft Power
- Professor Thuli Madonsela - Future of Soft Power: African Perspective
- Professor Arthur Petersen - Nation Branding through Science and Technology
- David Miliband – View from New York

05

Contributions



**David L. Heymann M.D.**  
 Professor of Infectious Disease Epidemiology, London School of Hygiene and Tropical Medicine

# The Soft Power of Public Health

“COVID-19 has turned my world upside down.” These were the words of a mid-level ministry of health official from a central Asian country, a public health leadership fellow I mentor. The fellow went on to describe how colleagues in the ministry had consulted guidance provided by the World Health Organization on controlling the COVID-19 pandemic, but that there was a felt need for additional support from their trusted and informal network of North American and European colleagues.

The dilemma was, however, that European and North American countries were poorly controlling their outbreaks, with high and increasing levels of mortality, and had shut down their economies requiring populations to forcibly physical distance. To them this seemed a startling rigid approach, much as had been undertaken by China, and an approach they did not wish to follow.

In fact, they felt they had always had sound advice from colleagues in North America and Europe, the culture and values of which they understood despite their close geographic and cultural proximity to other major economic powers with differing values. But this time it was different - the guidance these colleagues were providing in their own countries seemed ineffective in controlling the pandemic - and they were not sure where to turn.

In mentoring discussions that followed, I learned that they had become even more confused: European and North American countries had begun to pre-purchase vaccine supplies for their own populations, seemingly without concern for the needs of other countries, while it was other economically advanced countries, with different political values, that were purchasing and providing vaccine to countries in need.

The Global Soft Power Index 2021 scores of the countries in Europe and North America would be reassuring to my fellow and colleagues. But they would likely note that other countries are also increasing in soft power as reflected in the Index, many of them the countries to which they hesitate to turn – and some of which provide COVID-19 vaccines at no cost to countries in need, with priority to purchase more. In addition to foreign assistance such as gifted vaccine, soft power can be applied through informal networks of technical experts in public health. They are an excellent way to exchange information about public health, and to share the political and cultural influences behind public health decisions, many of which impact on foreign policy. In fact, better health is a goal of all individuals and societies, and is thus often seen as a neutral entry point for establishing common ground. The newly coined term ‘health diplomacy’ expresses the importance of health in international discussions. Shared values in health often lead governments to common understanding.

The power of a shared public health value among experts from the US and USSR in 1967, for example, led these politically opposed countries to a common goal of eradicating smallpox through a resolution of the World Health Organization. Smallpox, estimated to have killed 2.7 million persons in 1967 alone, was successfully eradicated in 1980. Once the resolution had been passed, smallpox eradication became embedded in foreign policy in the US, the USSR and all other countries, leading to the sustained financial and technical contributions required. It also provided a glimpse of the global solidarity that the soft power of public health can accomplish.

It is not only the soft power of technical experts in public health that influences



foreign policy. Rotary International, a global network of over 1.2 million men and women, is another example of how a shared public health value can influence foreign policy. In the Rotary International network are action-oriented men and women who seek to unite the world to create lasting change. Its members range from respected business leaders to key personalities and problem-solvers who come from 145 countries with differing cultures and values.

In the mid-1980s, Rotary International began promoting the value of equitable access to polio vaccination for all children. As a result, a World Health Resolution to eradicate polio was passed, and today every country in the world adheres to this common public health goal, their foreign policies continuing to provide sustained financial and technical support. And Rotary International continues to use the soft power in public health as eradication continues, helping overcome fractious interests and unblocking obstacles to vaccinating children through dialogue and negotiation with and between opposing parties.

The soft power of action on health - and public health in particular - unifies political and cultural values that can be moulded into common foreign policy and global solidarity. The International Health Regulations 2005 is a public health treaty aimed at creating solidary in public health during periods

such as the current COVID-19 pandemic. The major emphasis of the Regulations is a requirement for all countries to develop core capacities in public health that help them detect and respond rapidly to public health emergencies, thus preventing them from spreading internationally. In addition, the Regulations are intended to create a safety net of global solidarity in the event that international spread does occur, bringing countries together to share experiences, share in the benefits of research, and support each other. But to date, geopolitical tensions have dominated the COVID-19 pandemic dialogue and the Regulations have not met their full potential.

It is this failure to reach the full potential of global solidarity that exemplifies the concern expressed to me in mentoring sessions last year. National self interest has been dominated by issues ranging from lack of transparency and data sharing to monopolising the purchase of vaccines, therapeutics, and diagnostic tests. National self interest is hard for political leaders to ignore; they must ensure that their populations are safe. But political leaders who understand that they must also do no global harm –and understand the benefits that the soft power of health can bring– will help attain global solidarity. And they will surely increase their own Global Soft Power index score in years to come, leaving many other countries behind.



**George Yeo**

Former Minister for Foreign Affairs of Singapore and Senior Adviser to Kuok Group and Kerry Logistics Network

## The Impact of COVID-19 on Soft Power in Asia

The COVID-19 pandemic is a major stress test on all social systems. Like sudden climate cooling caused by an asteroid hitting Yucatan 66 million years ago, all species are challenged. Dinosaurs went extinct, while mammals thrived. With COVID-19 expected to linger on for a while longer, a similar Darwinian process is currently underway separating stronger social systems from weaker ones.

The impact of COVID-19 can be analysed at both country and city levels.

At the country level, China, where the pandemic first erupted, reacted decisively and successfully. China now has a system of response which enables it to identify, contain, and extinguish new eruptions of the disease. It is a draconian system which requires entire cities or even provinces to be shut down once the alarm is raised. But the system has worked. Every city has the capability to test millions of inhabitants within a few days. Despite huge inconveniences, Chinese people by and large accept the disciplines. The result is greater freedom of movement in China than anywhere else on Earth.

The world's reaction to the way China has managed the pandemic is mixed, however. Among Western countries, the perception of China has turned markedly negative. Despite providing much of the world's personal protection equipment, it is accused of politicising exports and boasting. Even though China is the most important supplier of vaccines to the developing world, its vaccines are denigrated as being less advanced and effective. The current western antipathy towards China has deep causes, which the pandemic has made worse.

Among many developing countries, the esteem of China has gone up. China is seen to have performed much better than the US and Europe. China has been generous with its aid. China is often their only supplier of vaccines, which are provided either as aid or at prices which are considerably lower than western vaccines (if available to them).

All cities are hubs of economic activity. Connection to a hub enables individuals and corporations to buy cheaper and sell dearer. Unfortunately, every connection is also a source of infection. During this pandemic, hubs are shut down.



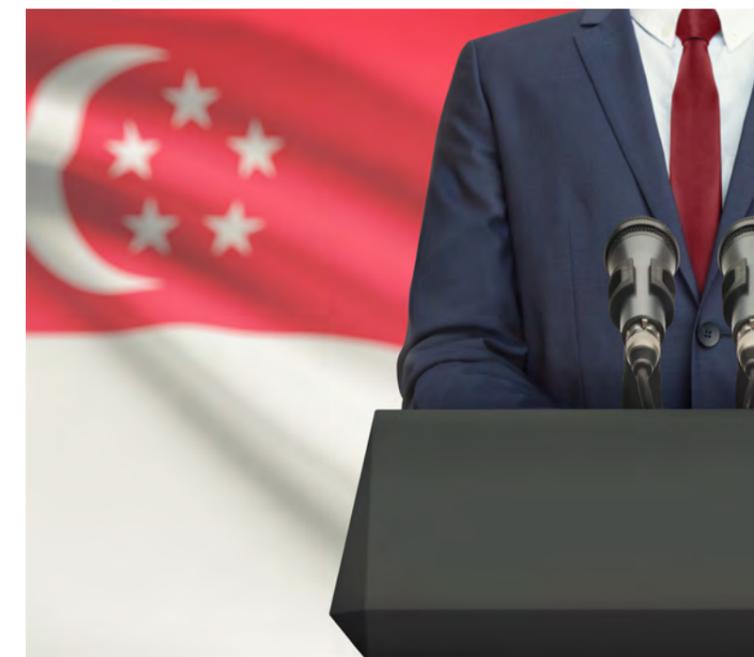
Connections are cut to protect ourselves from others. The result is economic paralysis. The hubs which are able to re-open without being unsafe, either to themselves or to those who connect to them, will flourish compared to others which remain compromised.

Singapore is a hub which is determined to re-open without being unsafe. This cannot be done simply. Singapore is putting in place a comprehensive system of external monitoring, early warning, quick detection, contact tracing, rapid containment, and effective treatment. All this requires data analytics, information exchange with other hubs, compartmentalisation of population and people flows, speedy and accurate testing and, of course, vaccination. Singapore Airlines will soon be launching flights with air crews who are all vaccinated. Airport transit areas are being redesigned to ensure separation and close monitoring of human movement. Expert learning systems are being put in place so that Singapore can again become a hub for long-haul flights and international air travel. The World Economic Forum announced its intention to hold a physical meeting in Singapore this year only after careful evaluation of current and proposed risk mitigation in Singapore. Participants will naturally have to be tested and their freedom of movement limited.

Other cities in Asia are making similar efforts. Generally speaking, countries in East Asia, plus Australia and New Zealand, have been much more determined and successful

in controlling COVID-19 than other parts of the world. The cities in East Asia are more likely to open up to one another with fewer quarantine requirements than to other parts of the world.

The longer COVID-19 hovers over the world, the greater the contrast in the differential response among countries and cities. Last year, China's GDP grew 2.3% compared to negative 4-5% for the rest of the world. China's exports are booming. The cost of sea freight from East Asia to Europe and the west coast of the US has gone up sharply because East Asia now accounts for much of global manufacturing. This is soft power expressed in dollars and cents.





**Carl Bildt**

Co-Chair, European Council on Foreign Relations and Former Prime Minister of Sweden

## Sweden's Approach to the Pandemic

Soft power has numerous aspects, but there is little doubt that all of them have been at play as countries battle with the COVID-19 pandemic.

Obviously, perceptions of how governments and societies have handled the challenge of COVID-19, will affect the way in which the outside world is looking at them, thus either increasing or decreasing their attractiveness in different aspects.

The most obvious case is of course China.

Opinion polls in Europe and North America have shown that distrust of China and its policies have been increasing during the years of the pandemic. Although other factors have certainly played in - the situation in Hong Kong probably being the most prominent of these - there is little doubt the perception was that China was initially slow to respond to the pandemic.

The Chinese government have gone to great length to counteract this, highlighting its far more successful efforts during the later stages of the pandemic – reaching out to the countries of Africa with vaccines and offering further help in order to retain, or possibly increase, its influence there.

Not being primarily a “hard power” on the global stage, China is dependent upon its reputation of successful governance, and there is little doubt that this has taken a beating in important parts of the world during this pandemic.

The same naturally applies - perhaps even more so - to significantly smaller nations, like Sweden.

Sweden is in many respects a global nation. Our economic development is built on the success of our exports to markets all over the world, and this has created the basis for a prosperous society, with a high level of welfare and quality of life. In opinion polls, Sweden is the country within the EU where support for globalization in broad terms is the strongest.

And in soft power terms, Sweden has traditionally been ranked high compared with other countries of similar size. Sweden has generated an unusual amount of attention due to the impression that there was another way than the severe lockdowns to handle the challenge of the pandemic. In the initial phases, there was a flood of coverage in the global media that Sweden

was relying on voluntary measures and avoiding the severe restrictive measures undertaken in most other countries.

It was also indicated that this milder response to the pandemic was important in alleviating at least some of the negative impact on the economy. Keeping retail and restaurants open was part of the policy, although there were recommendations trying to ensure social distancing here as well.

In this initial phase, representatives of the authorities in Sweden happily played along with the media attention, to the extent that they even offered negative comments on the measures of neighbouring countries. That this wasn't universally appreciated by them, goes without saying.

As the pandemic developed, the picture gradually changed. Although other countries across Europe suffered worse than Sweden, it was obvious that Sweden was doing significantly worse than its Nordic neighbours Finland, Norway, and Denmark. Comparisons between different countries are often difficult, but the Nordic countries are fairly similar in social structure, as well as exposure to the outside world, and thus these comparisons are more relevant than most others.

As I write this, the number of people that have died of COVID-19 in Sweden is several times the total number of people that have died in Finland, Norway, and Denmark, and together they are, in terms of population, approximately 50 times larger than Sweden.

With these facts the global media perception of Sweden changed rather dramatically. If there had been curiosity, with an undertone of hope, that there was a less restrictive way possible, this rapidly changed into a picture of failure, naivety, and perhaps even deception by the authorities.

By then the authorities also changed their approach. While initially they were saying that the Swedish approach was different and better, they gradually changed their tact saying the impact of the pandemic, compared to its neighbours, had been exaggerated.

The Swedish Institute - an agency under the Ministry of Foreign Affairs - is tasked with following how the image of the country is around the world. In its annual report for 2019 it was all positive and centred on issues like the environment, sustainability, and innovation. But throughout 2020, these issues have of course nearly disappeared and been replaced with the handling of the pandemic.

When its annual report covering 2020 is published, the picture will undoubtedly be somewhat difficult. Sweden being perceived as an example worth emulating by far-right groups resisting face masks and other measures is hardly something to be jubilant about.

And although the jury is still out as the pandemic is ongoing, no country can be totally satisfied with its handling of coronavirus. In all likelihood, the attempt by Swedish authorities to present themselves as representatives of a different and better way to handle the pandemic would be seen as having been a mistake that backfired.





**Professor Joseph Nye**  
 University Distinguished  
 Service Professor Emeritus;  
 Former Dean of Harvard's  
 Kennedy School  
 of Government

# American Soft Power

Polls in 2020 showed a serious decline in American soft power around the world. Coronavirus not only killed Americans; it also damaged our reputation for competence. But the problem began before 2020. The decline in attractiveness began to appear soon after Donald Trump became president.

As I show in *Do Morals Matter?* Presidents and Foreign Policy from FDR to Trump, historically America gained the soft power of attraction from our culture, our values (when we lived up to them), and our policies (when they were seen as legitimate because they were framed with some humility and awareness of others' interests). How our government behaves at home (for example, protecting a free press), in international institutions (consulting others and multilateralism) and in foreign policy (promoting development and human rights) affects others by the influence of our example. In all of these areas, Trump reversed attractive American policies. Moreover, his first budget director

proclaimed a "hard-power budget" as he slashed funds for the State Department and the U.S. Agency for International Development by 30%. And Trump showed disdain for alliances and multilateralism. Fortunately, America is more than its government. Unlike hard power assets, many soft power resources are generated by our civil society.



Can America recover its soft power? We have done so before. The COVID-19 crises can lead us to forget the capacity of this country for resilience and reform. In the 1960s, our cities were in flames over racial protests, and we were mired

in the Vietnam War. Massive protests followed the assassinations of Martin Luther King and Robert Kennedy. Yet in the following decade, a series of reforms passed Congress, and the honesty of Gerald Ford, the human rights policies of Jimmy Carter, and the unifying optimism of Ronald Reagan proved to be restorative. In the 1960s, when crowds marched through the world's streets protesting American policies in Vietnam, it is worth noting that the protesters did not sing the communist "Internationale." Instead, they sang Martin Luther King's "We Shall overcome." An anthem from the civil rights protest movement illustrated that America's power to attract rested not on our government but in large part on our civil society and our capacity to be self-critical and change.

What can President Biden do? He will start by changing policies to emphasize alliances and multilateralism. Rejoining the Paris climate accords and the World Health Organization is a good start, but American soft power has deeper roots than politics and policies. Hollywood movies which showcase independent women or protesting minorities can attract others. So, too, does the charitable work of US foundations and the freedom of inquiry at American universities. Firms, universities, foundations, churches, and protest movements develop soft power of their own which may reinforce or be at odds with official foreign policy goals. And despite Trump's churlish exit, American soft power was strengthened by the fact that a federal democracy carried out an honest election in 50 states with a record turn-out despite the worst pandemic in a century. These civic sources of soft power are increasingly important in the age of social media. Even our peaceful protests can generate soft power.

Skeptics argue that the decline of American soft power did not matter much because other countries cooperate out of self-interest. But that argument misses a crucial point: cooperation is a matter

of degree, and the degree is affected by attraction or repulsion. As RAND's John Arquilla has put it, in an information age, success depends not only on whose army wins, but also on whose story wins. The open values of our democratic society are among the greatest sources of America's soft power. Even when mistaken government policies reduce our attractiveness, the ability of America to criticize itself and correct its mistakes can make our story attractive to others at a deeper level. We are at such a point now.





**Professor Thuli Madonsela**

Law Trust Chair in Social Justice at Stellenbosch University and Former Public Protector of South Africa

## Future of Soft Power: African Perspective

The appointment of Harvard graduate Ngozi Okonjo-Iweala to head the World Trade Organisation (WTO) is both a game changer and an indicator of a changing game regarding Africa's global standing and related soft power. The appointment is a game changer since it is likely to contribute to the changing perceptions of Africa as a place where leaders are grown, as opposed to a place that needs other continents to lead it. The fact that Okonjo-Iweala is a woman is cherry on top, as the historical stigmatisation and infantilisation of African women is second only to the stigmatisation and infantilisation of the entire people. The appointment will not only go a long way in enhancing global respect for African leadership, but it will also contribute to a favourable perception of African women leaders.

The changing game aspect is about what the appointment means regarding shifting perceptions of merit, from an ethnocentric Afro-phobic lens to one that embraces true merit that comes in diverse packages. The fact that Okonjo-Iweala was able to go through the eye of the needle to take her place at the

helm of the globally revered World Trade Organisation, signals winds of change regarding Africa's ability to contribute competently to global leadership.

It is worth noting that Iweala is in good company. A notable pioneer in showing the world a remarkable African leadership potency was Nelson Mandela. His global impact influencing and inspiring others to think and act in a particular way, which is the art of leadership, is a textbook case of soft power as his title was only limited to the South African presidency and periodically, African Union leadership. Then there was Kofi Annan whose global footprint as the United Nations General Secretary, which includes bringing business to the UN fold through the UN Global Compact endures beyond his life. Then followed Phumzile Mlambo-Ngcuka, a rather unsung hero, who should be credited with the tipping point that made embracing gender equality a trend and Hollywood come to the party.

What can we read from Okonjo-Iweala's appointment and current trends regarding the future of soft power

from an African perspective? It seems to me that we will see more growth in the paradigm that sees Africa as an equal and not a perpetual stepchild of global leadership. The trend as I see it transcends politics and includes Africa's world influence through literature, art, fashion, and business, among other things. Young Africans African global cultural ambassadors such as Chimamanda Ngozi Adichie, Lupita Nyong'o and Trevor Noah as well as brands including MAXHOSA by Laduma, Springboks and Dangote, are igniting what seems destined to become a tipping point in perceptions of Africa.

Worth noting, is that these young self-assured Africans, embrace their African identity together with their global citizenship and are mainstreaming African values into global thought processes. This may just see Steve

Biko's prediction that Africa's main gift to the world will be Ubuntu or humaneness. While it looks like South Africa and Nigeria - in 37<sup>th</sup> and 82<sup>nd</sup> places in the Global Soft Power Index 2021, respectively - are leading charge in repositioning the African brand, Kenya and others, particularly those in the COMESA group are emerging strongly, particularly in the 4IR space.

For Africa's star to continue to rise in leveraging soft power as a currency for good change globally though the political leadership of the continent, it needs to ensure that the continent and its constituent parts are led in a manner that is EPIC - Ethical, Purpose Driven, Impact Conscious and Committed to serve. Despite periodic challenges, the African renaissance initiative of Thabo Mbeki consolidated in Agenda 2030 and #TheAfricaWewant quest, inspire hope.





**Professor Arthur Petersen**

Professor of Science, Technology and Public Policy, University College London, and former Chief Scientist, PBL Netherlands Environmental Assessment Agency

# Nation Branding through Science and Technology

One of the ways for nations to shape the preferences of other nations is through their science, technology, and engineering base. This phenomenon is included in the Global Soft Power Index's Education & Science pillar. There are myriad pathways

Some soft power superpowers such as Japan, the United States, and Germany score particularly high on the Education & Science dimension of the Index. There are also nations that obtain moderately high scores for the Education & Science pillar as a whole, while they are actually globally recognised for particular scientific or technological achievements.



The Netherlands with its water science and engineering and the United Arab Emirates with its space science and engineering provide two cases in point. Since both the water and space sectors are globally gaining in importance, both nations' brands can be expected to grow along the

dimension of science and technology.

## Spreading Dutch Delta Management

The Netherlands punches above its weight in the global public's attention for

through which a nation's science and technology base has impact on a nation's brand. Ultimately, peoples' perceptions of a nation's soft power strength in science and technology are driven by images and stories that they can vividly remember.

climate change adaptation action because many people have seen images of its water engineering marvels in the form of its Delta Works and have heard stories about its more recent Delta Programme for dealing with climate change. Dutch water engineering technology has been developed over centuries to millennia. On top of Dutch water engineering technology comes the nation's scientific approach to delta management through Delta Plans.

Dutch knowledge institutes and Dutch engineering companies, in tandem with efforts by the Dutch government, have been steadily building global relations with other countries on delta planning processes and water engineering projects, with a lasting influence on those other countries' positions with respect to climate adaptation, in local, regional, and global fora. The influence of the Dutch delta planning approach can for instance be seen in South and Southeast Asia, in Bangladesh, Myanmar, and Vietnam. Another set of examples were the requests for assistance for Dutch help from the United States after hurricanes Katrina and Sandy.

## Showcasing Arab Space Science and Technology

The United Arab Emirates can now be counted among the global powers in space engineering with the successful entering

into orbit of its Hope mission to Mars on February 9<sup>th</sup>, 2021; the planet's media were flooded with images and stories of that very recent success. The UAE have been in the business of space engineering and earth satellites for a number of years, but it was only at the end of 2013 that the plan arose for the country to go to Mars by 2021. The technological leapfrogging compared with other nations, and the ability to develop local Emirati capability to carry out such a mission have not only contributed to the UAE's self-understanding as a nation investing in its STI systems but have also led to global admiration.

A study performed by UCL has found early evidence that the mission is impacting multiple development processes in the country, with diplomatic ramifications. The UAE's reputation in the international space community has obviously grown significantly. The country is now seen even more as a trusted collaborator on future international programmes. Also, local perceptions about the attractiveness of science careers have been noticeably changing, which has prompted the creation of new university degrees. Furthermore, the evidence suggest that the mission is supporting the UAE's leadership and efforts in enhancing regional and global prosperity and well-being.





**David Miliband**  
CEO and President,  
International Rescue  
Committee

## View from New York

Most of the debate about “soft power” has focused on the first part of the phrase – the contrast between the power of example or attraction to get other countries to do things, on the one hand, and the use of coercion of various kinds to get them to cooperate, on the other. There are plenty of good reasons for this focus, not least given the drift over the last twenty years to the increasing use of hard power – part of what the late Richard Holbrooke, one of the stars of US diplomacy whose achievements included the Dayton Peace Accords, called the “militarization of diplomacy”.

The focus of soft power on the attraction of followers is a welcome reminder that example matters. As Joe Nye, the inventor of the term, always says, soft power was instrumental in winning the Cold War. You can hear an echo of that insight in President Biden’s repetition of the phrase “we will lead by the power of

our example not the example of our power” (first used by President Clinton, I think).

However, there is a danger too, namely that “soft power” becomes equated simply with “reputation”. There is no question that reputation is important to countries. But the idea of soft power has traction on international relations when it goes beyond reputation. I would say it has this

traction when it amounts to “reputation plus leverage”. That is why it seems to me important that Joe Nye emphasizes that soft power does not sit separate from hard power (which might be military, but

also could be economic), and often is most effective when used alongside it.

Three points seem to me to be fundamental to soft power going forward. The first is about audience. Soft power has been most discussed in respect of the power



to attract others from abroad. But soft power starts at home. Every government, democratic or autocratic, lives in coalition with its own people – although obviously they have different means at their disposal when confidence is lost. But the first audience is on the home front – and as recent developments in Russia and Myanmar show, international reaction is not dispositive when a government considers its power is on the line.

What is more, there is a contest for soft power at home. The video by Alexei Navalny is a daring challenge to the Russian Government’s control of national narrative and thereby of soft power. In the West, Laura Daniels, who works at the US State Department, has recently written of the weaponization of soft power by white supremacists. She denotes how in respect of culture, political ideals and actions, white supremacists have taken soft power seriously, reframing their ideas to seep into the mainstream. Free societies have the challenge of living up to their ideals while propagating them.

Second, the greatest threat to the soft power of a country comes from saying one thing and doing another. In the digital world, it is dissonance between public statements and private actions that is most undermining. That is why autocratic countries make such hay out of illiberal actions by democratic countries. When President Trump denied rights to claim asylum or undermined the US legal system or flouted laws and norms, he gave talking points to autocrats who wanted to say, to their own people and to others, that there was no difference between autocracy and democracy.

For the UK, Brexit represents a step back from global engagement, which is one reason that the idea of “Global Britain” has been so hard to define or sell; the substance and the sales pitch don’t match. There are also soft power consequences of hard decisions – for example, the recent move to

cut the UK aid budget by 30 per cent. Soft power does not live in a vacuum.

Third, we are seeing a new fusion of soft and hard power in economic competition for advantage around the globe. Turkey, for example, claims to have sent medical assistance to 155 countries in its effort at Corona-diplomacy. This will only be heightened by the arguments about a COVID-19 vaccine. China’s Belt and Road Initiative is hard cash and soft influence. The investigation by the Economist showing a positive correlation between voting patterns at the UN and Chinese economic support makes the point. The West is playing catch up, and (rightly) faces debates about the instrumentalization of aid.

The writer Shoshana Zuboff has written that 20<sup>th</sup> century politics was a contest over the ownership of the means of production, but 21<sup>st</sup> century politics is a contest over the ownership of the production of meaning. Here is one reason that Non-Governmental Organizations have the responsibility to speak truth to power. We need to bear witness to what is actually happening, to provide a countervailing force to spin and fake news. The phrase “a lie is half way round the world before the truth gets its boots on” has extra meaning in today’s digital world. Given that soft power can be based on lies as well as truth, we all have our work cut out.





06

**Appendices**

# Global Soft Power Index

The full breakdown of results by nation

● Gold digits | First in Class ● Silver digits | Second in Class ● Bronze digits | Third in Class

Rank 2021	Rank 2020	Nation	Region	Index Score 2021	Index Score Change	Index Score 2020
1	2	Germany	Europe	62.2	+0.3	61.9
2	4	Japan	Asia	60.6	+0.4	60.2
3	3	United Kingdom	Europe	57.9	-3.9	61.8
4	7	Canada	North America	57.2	+2.7	54.5
5	8	Switzerland	Europe	56.3	+1.8	54.5
6	1	United States	North America	55.9	-11.2	67.1
7	6	France	Europe	55.4	-3.1	58.5
8	5	China	Asia	54.3	-4.4	58.7
9	9	Sweden	Europe	52.2	+0.3	51.9
10	13	Australia	Oceania	52.2	+3.3	48.8
11	14	South Korea	Asia	51.3	+3.1	48.3
12	12	Netherlands	Europe	50.5	+1.6	48.9
13	10	Russia	Europe	50.5	-0.5	51.0
14	17	Norway	Europe	50.1	+2.7	47.3
15	15	Denmark	Europe	49.4	+1.7	47.7
16	22	New Zealand	Oceania	49.3	+5.9	43.5
17	18	United Arab Emirates	Middle East & North Africa	48.4	+2.4	45.9
18	21	Finland	Europe	48.4	+3.6	44.8
19	11	Italy	Europe	48.3	-1.0	49.3
20	20	Singapore	Asia	47.9	+3.1	44.8
21	19	Belgium	Europe	47.7	+2.2	45.5
22	16	Spain	Europe	47.5	-0.2	47.6
23	23	Austria	Europe	46.7	+3.2	43.5
24	26	Saudi Arabia	Middle East & North Africa	44.2	+2.3	41.9
25	25	Israel	Middle East & North Africa	43.6	+1.1	42.6
26	31	Qatar	Middle East & North Africa	42.3	+3.8	38.5
27	30	Turkey	Europe	42.3	+3.0	39.4
28	28	Portugal	Europe	40.8	+0.3	40.6
29	24	Ireland	Europe	40.7	-2.3	43.0
30	-	New Iceland	Europe	39.9	-	-

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Nation	Familiarity	Reputation	Influence	Business & Trade	Governance	International Relations	Culture & Heritage	Media & Communication	Education & Science	People & Values	COVID-19 Response	Medals
Germany	7.8	7.5	6.0	6.8	5.8	6.7	5.2	4.9	6.6	4.2	5.7	16
Japan	7.5	7.3	5.6	7.0	5.3	5.7	5.2	4.1	7.5	4.5	5.8	12
United Kingdom	8.0	7.3	6.1	6.0	5.3	6.4	5.7	5.4	5.7	4.3	3.7	15
Canada	7.4	7.5	5.1	6.2	5.8	5.7	4.7	4.6	5.0	5.2	5.6	16
Switzerland	6.8	7.6	4.8	6.2	5.9	5.7	4.6	4.5	5.1	4.7	5.8	17
United States	8.5	6.6	7.2	6.5	3.8	6.2	5.3	5.1	7.0	3.6	1.2	13
France	8.0	7.2	5.7	5.7	4.7	6.1	6.0	4.6	4.7	4.2	3.8	7
China	7.7	5.5	6.8	6.3	3.0	4.9	4.1	2.9	6.1	2.7	3.7	6
Sweden	6.3	7.1	4.4	5.9	5.6	5.3	4.6	4.4	5.0	4.8	5.2	8
Australia	7.0	7.2	4.5	5.4	4.8	4.8	4.4	4.2	3.8	4.7	5.3	1
South Korea	6.5	6.5	4.7	5.8	4.0	4.2	4.1	3.7	5.6	3.9	5.4	-
Netherlands	6.4	6.9	4.4	5.3	4.9	4.7	4.7	4.0	4.1	4.7	5.0	-
Russia	7.2	6.0	5.6	4.4	3.4	5.2	4.3	3.5	4.9	2.9	4.0	1
Norway	5.7	7.0	4.1	5.3	5.4	4.8	4.2	4.2	4.3	4.6	5.5	4
Denmark	5.8	6.9	4.0	5.3	5.3	4.6	4.1	4.1	4.2	4.7	5.4	-
New Zealand	6.0	7.0	3.8	5.1	5.1	4.3	4.0	4.0	3.6	4.8	5.9	5
United Arab Emirates	5.5	6.4	4.8	5.4	4.0	4.5	3.7	3.3	3.8	3.6	4.9	1
Finland	5.3	6.9	3.8	5.3	5.3	4.4	3.9	4.1	4.5	4.6	5.5	3
Italy	7.8	7.0	5.1	5.1	3.6	4.5	6.2	3.9	3.5	4.6	2.5	5
Singapore	5.6	6.8	4.1	5.5	4.1	3.9	3.7	3.4	4.5	4.0	5.4	-
Belgium	6.0	6.8	4.2	5.0	4.6	4.8	4.2	3.9	3.7	4.2	4.6	-
Spain	7.5	6.9	4.9	4.7	3.5	4.2	6.0	4.1	3.1	4.6	2.8	3
Austria	5.8	6.8	4.1	4.3	4.1	3.7	3.7	3.5	3.4	3.6	5.3	-
Saudi Arabia	5.7	5.9	4.7	4.4	3.3	4.2	3.1	2.8	2.8	2.9	4.2	-
Israel	5.9	5.7	4.6	4.1	2.9	4.1	3.4	3.1	4.5	2.9	3.7	-
Qatar	4.4	6.0	4.0	4.7	3.5	3.9	3.2	3.1	3.1	3.4	4.7	-
Turkey	6.2	5.8	4.4	4.2	2.8	3.6	4.2	3.0	2.7	3.4	3.5	-
Portugal	6.1	6.4	3.9	2.9	3.0	2.6	3.7	2.5	2.2	3.5	4.0	2
Ireland	5.6	6.6	3.8	4.1	3.7	3.0	3.7	3.2	2.6	4.0	3.3	2
Iceland	4.9	6.6	3.3	3.5	4.0	3.1	3.0	3.0	2.7	3.5	4.4	-

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## The full breakdown of results per nation

Rank 2021	Rank 2020		Nation	Region	Index Score 2021	Index Score Change	Index Score 2020
31	34	↑	Greece	Europe	39.8	+3.2	36.6
32	-	New	Luxembourg	Europe	39.0	-	-
33	32	↓	Thailand	Asia	38.7	+1.1	37.6
34	38	↑	Egypt	Middle East & North Africa	38.3	+3.5	34.8
35	29	↓	Brazil	Latin America & Caribbean	38.1	-1.3	39.4
36	27	↓	India	Asia	37.7	-3.9	41.6
37	36	↓	South Africa	Sub-Saharan Africa	37.2	+0.7	36.4
38	35	↓	Poland	Europe	37.0	+0.4	36.6
39	33	↓	Malaysia	Asia	36.9	-0.4	37.4
40	39	↓	Czech Republic	Europe	36.3	+1.9	34.4
41	40	↓	Argentina	Latin America & Caribbean	36.1	+2.1	33.9
42	-	New	Kuwait	Middle East & North Africa	35.8	-	-
43	45	↑	Hungary	Europe	34.7	+2.8	31.9
44	37	↓	Mexico	Latin America & Caribbean	34.4	-1.3	35.6
45	41	↓	Indonesia	Asia	34.3	+0.9	33.4
46	-	New	Slovenia	Europe	34.2	-	-
47	50	↑	Vietnam	Asia	33.8	+2.5	31.3
48	-	New	Morocco	Middle East & North Africa	33.8	-	-
49	43	↓	Croatia	Europe	33.7	+1.4	32.4
50	-	New	Jordan	Middle East & North Africa	33.7	-	-
51	-	New	Oman	Middle East & North Africa	33.6	-	-
52	49	↓	Colombia	Latin America & Caribbean	33.6	+2.1	31.5
53	42	↓	Philippines	Asia	33.4	+0.9	32.5
54	47	↓	Estonia	Europe	33.4	+1.7	31.7
55	44	↓	Chile	Latin America & Caribbean	33.4	+1.2	32.2
56	-	New	Uruguay	Latin America & Caribbean	33.1	-	-
57	52	↓	Romania	Europe	32.2	+1.9	30.4
58	-	New	Cuba	Latin America & Caribbean	32.2	-	-
59	51	↓	Peru	Latin America & Caribbean	32.1	+1.3	30.8
60	-	New	Panama	Latin America & Caribbean	32.0	-	-

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Nation	Familiarity	Reputation	Influence	Business & Trade	Governance	International Relations	Culture & Heritage	Media & Communication	Education & Science	People & Values	COVID-19 Response	Medals
Greece	6.2	6.2	3.9	3.0	2.6	2.6	4.3	2.4	2.2	3.6	3.6	1
Luxembourg	4.1	6.6	3.6	3.8	3.7	3.5	3.0	2.8	2.5	3.5	3.9	-
Thailand	5.9	6.0	3.8	3.4	2.6	2.6	3.9	2.6	2.4	3.7	3.3	-
Egypt	6.5	5.8	3.8	3.0	2.1	2.8	4.4	2.5	2.4	2.9	3.0	2
Brazil	6.9	6.1	4.2	3.8	2.0	3.0	5.1	2.8	2.3	4.0	1.4	2
India	6.8	5.4	4.4	3.7	2.1	2.8	4.1	2.5	3.3	3.1	1.5	1
South Africa	5.8	5.7	3.8	3.4	2.4	3.0	3.4	2.5	2.3	3.1	2.9	-
Poland	5.4	6.0	3.7	3.4	2.5	2.3	2.5	2.5	2.2	2.9	3.3	-
Malaysia	4.9	6.1	3.6	3.4	2.4	2.3	2.7	2.2	2.3	2.9	3.7	-
Czech Republic	4.8	5.9	3.5	3.0	2.2	2.2	2.8	2.0	2.2	2.9	3.9	-
Argentina	5.9	6.0	3.7	2.8	1.9	2.5	3.6	2.4	2.3	3.4	2.6	-
Kuwait	4.2	5.8	3.7	3.1	2.8	3.0	2.2	1.9	1.9	2.2	3.7	-
Hungary	4.6	5.7	3.3	3.0	2.4	2.6	3.0	2.4	2.3	3.2	3.3	-
Mexico	6.5	5.6	3.8	2.6	1.5	1.8	3.7	2.1	1.9	3.1	1.9	-
Indonesia	5.0	5.7	3.4	2.8	2.0	2.2	2.8	1.9	2.1	2.7	3.2	-
Slovenia	3.6	5.7	3.2	2.6	2.3	2.3	2.7	2.6	2.0	2.9	4.1	-
Vietnam	5.3	5.5	3.3	2.8	1.9	1.9	2.7	1.9	1.9	2.7	3.2	-
Morocco	4.8	5.7	3.4	2.7	2.2	1.9	3.1	1.8	1.4	2.8	3.3	-
Croatia	4.4	5.8	3.3	2.8	2.4	2.3	3.1	2.3	2.0	3.1	3.0	-
Jordan	3.9	5.5	3.1	2.2	2.5	2.3	2.8	2.0	2.0	2.7	4.0	-
Oman	3.2	5.7	3.1	3.1	2.8	2.7	2.2	2.1	2.2	2.7	3.9	-
Colombia	5.3	5.3	3.4	2.9	1.9	2.4	3.2	2.5	2.2	3.5	2.5	-
Philippines	5.1	5.6	3.3	2.4	1.8	1.7	2.4	1.8	1.6	3.0	3.3	-
Estonia	3.2	5.6	3.0	2.7	2.4	2.0	2.1	2.3	2.2	2.7	4.4	-
Chile	4.8	5.5	3.3	2.8	1.9	1.9	2.6	2.1	2.1	2.5	3.1	-
Uruguay	4.0	5.5	3.1	2.9	2.1	2.3	2.6	2.3	1.9	3.1	3.5	-
Romania	4.5	5.4	3.2	3.0	2.4	2.4	3.1	2.5	2.3	3.2	2.3	-
Cuba	5.2	5.3	3.4	2.1	1.8	1.8	3.1	1.9	2.1	2.9	2.5	-
Peru	4.4	5.5	3.1	2.6	1.7	1.9	2.9	2.2	2.1	2.8	3.0	1
Panama	3.8	5.5	3.1	2.7	1.9	2.2	2.2	2.0	2.2	2.6	3.3	-

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## The full breakdown of results per nation

Rank 2021	Rank 2020		Nation	Region	Index Score 2021	Index Score Change	Index Score 2020	Nation	Familiarity	Reputation	Influence	Business & Trade	Governance	International Relations	Culture & Heritage	Media & Communication	Education & Science	People & Values	COVID-19 Response	Medals
61	46	↓	 Ukraine	Europe	31.9	+0.2	31.7		4.8	5.3	3.4	2.3	1.8	2.0	2.4	2.0	2.0	2.5	2.6	-
62	48	↓	 Iran	Middle East & North Africa	31.9	+0.4	31.5		5.5	4.9	3.9	1.9	1.6	2.3	2.1	1.4	1.7	1.6	2.2	-
63	53	↓	 Pakistan	Asia	31.8	+2.1	29.7		5.0	4.8	3.4	2.0	1.7	2.0	2.0	1.7	1.7	1.9	3.1	-
64	-	New	 Paraguay	Latin America & Caribbean	31.7	-	-		3.8	5.3	2.9	2.8	2.1	2.2	2.9	2.3	2.3	2.6	3.3	-
65	-	New	 Bahrain	Middle East & North Africa	31.7	-	-		3.2	5.4	3.2	2.8	2.0	2.3	2.0	2.0	2.0	2.4	3.5	-
66	-	New	 Bulgaria	Europe	31.6	-	-		4.2	5.6	3.2	2.7	2.1	2.1	2.4	2.2	2.2	2.7	2.6	-
67	-	New	 Serbia	Europe	31.4	-	-		3.9	5.2	3.1	2.4	1.9	1.8	2.2	2.0	1.8	2.3	3.4	-
68	-	New	 Costa Rica	Latin America & Caribbean	31.4	-	-		3.8	5.6	2.9	2.4	2.0	1.9	2.3	2.0	2.1	2.6	3.3	-
69	-	New	 Slovakia	Europe	31.3	-	-		3.7	5.7	3.2	2.5	1.9	1.8	2.3	2.2	2.3	2.3	2.9	-
70	-	New	 Sri Lanka	Asia	31.1	-	-		3.9	5.3	2.9	2.5	1.8	1.7	2.8	1.8	1.8	2.6	3.4	-
71	-	New	 Lebanon	Middle East & North Africa	31.1	-	-		4.5	5.1	3.3	1.8	1.5	2.0	2.4	1.8	1.8	2.5	2.9	-
72	-	New	 Azerbaijan	Europe	31.0	-	-		3.1	5.1	2.9	2.3	1.5	1.9	2.1	1.9	2.3	2.5	4.0	-
73	-	New	 Dominican Republic	Latin America & Caribbean	30.9	-	-		3.5	5.4	2.9	3.0	2.3	2.4	3.0	2.5	2.2	3.4	2.7	-
74	54	↓	 Algeria	Middle East & North Africa	30.3	+1.3	29.0		4.0	5.3	3.0	2.3	1.8	2.1	2.2	1.7	1.9	2.5	2.9	-
75	58	↓	 Kazakhstan	Asia	30.2	+2.5	27.7		3.3	5.1	2.9	2.3	1.8	2.2	2.2	1.9	2.2	2.2	3.5	-
76	59	↓	 Iraq	Middle East & North Africa	30.2	+2.5	27.7		5.5	4.6	3.5	1.6	1.0	1.5	1.8	1.3	1.2	1.7	2.6	-
77	-	New	 Jamaica	Latin America & Caribbean	30.2	-	-		4.3	5.5	2.8	2.2	1.7	1.9	3.5	2.1	1.7	3.5	2.5	-
78	57	↓	 Bangladesh	Asia	30.0	+1.5	28.5		4.0	5.0	3.0	1.9	1.8	1.6	2.0	1.7	1.8	2.1	3.2	-
79	-	New	 Lithuania	Europe	29.8	-	-		3.1	5.5	3.0	2.4	2.2	1.8	2.0	2.1	2.1	2.4	2.9	-
80	-	New	 Latvia	Europe	29.8	-	-		2.9	5.4	2.9	2.1	1.9	1.7	1.7	2.1	1.8	2.2	3.5	-
81	-	New	 Uzbekistan	Asia	29.2	-	-		3.0	5.2	2.8	2.6	2.1	2.3	2.5	1.9	1.6	2.7	3.0	-
82	56	↓	 Nigeria	Sub-Saharan Africa	29.2	+0.4	28.8		4.5	4.9	3.0	2.1	1.6	1.7	2.1	1.6	1.6	2.2	2.6	-
83	-	New	 Ethiopia	Sub-Saharan Africa	29.2	-	-		3.9	4.9	2.8	2.2	1.9	1.8	2.1	1.6	1.8	2.5	3.1	-
84	-	New	 Tunisia	Middle East & North Africa	29.0	-	-		3.8	5.3	3.0	1.9	1.6	1.9	2.3	1.7	1.8	2.6	2.6	-
85	-	New	 Bolivia	Latin America & Caribbean	29.0	-	-		3.6	5.0	2.9	2.3	1.6	2.0	2.0	2.0	1.7	2.4	2.9	-
86	-	New	 Cote d'Ivoire	Sub-Saharan Africa	28.9	-	-		2.9	5.2	2.7	2.2	2.0	1.7	2.5	1.8	1.7	2.4	3.3	-
87	-	New	 Zambia	Sub-Saharan Africa	28.6	-	-		2.9	5.0	2.7	2.4	1.9	1.9	2.3	1.5	1.6	2.3	3.3	-
88	-	New	 Cameroon	Sub-Saharan Africa	28.5	-	-		3.3	5.1	2.7	2.1	1.5	1.6	2.2	1.6	1.5	2.4	3.3	-
89	-	New	 Cambodia	Asia	28.5	-	-		3.6	5.0	2.8	2.2	1.8	1.7	2.2	1.6	1.6	2.3	3.0	-
90	60	↓	 Myanmar	Asia	28.5	+1.0	27.5		3.4	5.1	2.9	2.1	1.5	1.7	1.9	1.5	1.9	2.1	2.9	-

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The full breakdown of results per nation

Rank 2021	Rank 2020	Nation	Region	Index Score 2021	Index Score Change	Index Score 2020	Nation	Familiarity	Reputation	Influence	Business & Trade	Governance	International Relations	Culture & Heritage	Media & Communication	Education & Science	People & Values	COVID-19 Response	Medals	
91	-	New	Ecuador	Latin America & Caribbean	28.3	-	-		3.8	5.2	2.9	1.8	1.5	1.8	2.1	1.8	1.6	2.4	2.6	-
92	55		Venezuela	Latin America & Caribbean	28.2	-0.6	28.8		4.8	4.7	3.4	2.0	1.4	1.7	1.9	1.7	1.5	2.4	1.6	-
93	-	New	Ghana	Sub-Saharan Africa	28.1	-	-		3.5	5.2	2.9	1.8	1.6	1.8	2.2	1.5	1.3	2.3	2.8	-
94	-	New	Uganda	Sub-Saharan Africa	28.1	-	-		3.4	4.8	2.6	2.0	1.5	1.8	2.0	1.6	1.8	2.7	3.2	-
95	-	New	Nepal	Asia	28.0	-	-		3.8	5.4	2.7	1.6	1.7	1.5	2.1	1.5	1.6	2.0	2.8	-
96	-	New	Kenya	Sub-Saharan Africa	27.7	-	-		4.3	5.3	3.0	2.1	1.7	1.8	2.2	1.7	1.7	2.4	1.7	-
97	-	New	Tanzania	Sub-Saharan Africa	27.5	-	-		3.1	5.2	2.7	2.1	2.0	1.9	1.9	1.6	1.5	2.2	2.8	-
98	-	New	Senegal	Sub-Saharan Africa	27.5	-	-		3.3	5.0	2.9	1.9	1.4	1.3	2.0	1.5	1.4	2.1	2.9	-
99	-	New	Turkmenistan	Asia	27.4	-	-		2.3	4.9	2.8	1.7	1.7	1.3	1.7	1.5	1.6	1.5	3.6	-
100	-	New	Angola	Sub-Saharan Africa	26.9	-	-		3.1	4.8	2.7	1.9	1.4	1.5	1.5	1.2	1.2	1.9	3.2	-
101	-	New	Guatemala	Latin America & Caribbean	26.1	-	-		3.1	4.9	2.7	1.9	1.6	1.6	1.8	1.7	1.7	2.3	2.3	-
102	-	New	Honduras	Latin America & Caribbean	26.0	-	-		2.9	4.9	2.7	1.9	1.5	1.5	1.8	1.8	1.6	2.3	2.5	-
103	-	New	Trinidad and Tobago	Latin America & Caribbean	25.6	-	-		2.5	5.0	2.6	1.6	1.3	1.4	1.8	1.2	1.3	2.2	2.9	-
104	-	New	Mozambique	Sub-Saharan Africa	25.4	-	-		2.7	4.8	2.6	2.1	1.9	1.7	1.9	1.5	1.6	2.3	2.2	-
105	-	New	Dem. Rep. Congo	Sub-Saharan Africa	25.2	-	-		3.1	4.7	2.7	1.9	1.2	1.6	1.7	1.3	1.3	2.1	2.3	-

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### *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 25 years, we have helped companies and organisations of all types to connect their brands to the bottom line.

### *We pride ourselves on technical credibility*

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