



THE SOFT POWER 30

A Global Ranking of Soft Power

2018

Portland

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USC Center on Public Diplomacy

CONTENTS

7

Contributors

12

The Soft Power 30

16

Introduction

Disorderly conduct

Order up?

The 2018 Soft Power 30

30

Methodology of the index

Objective data

Subjective data

Changes, challenges, and limitations

40

Results and analysis

The top five

Breaking down the objective data

Breaking down the results

The Indo-Pacific in focus: The Asia Soft Power 10

India rising: soft power and the world's largest democracy

Dhruva Jaishankar, Brookings India

The ASEAN we don't know

Ong Keng Yong, RSIS

China goes global: why China's global cultural strategy needs flexibility

Zhang Yiwu, Peking University

Japan: Asia's soft power super power?

Jonathan Soble, Asia Pacific Initiative

Australia in Asia: the odd man out?

Richard McGregor, Lowy Institute

The two Koreas and soft power

Aidan Foster-Carter, Leeds University

The Asia Soft Power 10

New coalitions of the willing & emerging issues

For NGOs, we live and die by soft power

Bijan Frederic Farnoudi, Kofi Annan Foundation

Malaria elimination: The role of public and private leadership

Benjamin Rolfe and Patrik Silborn, APLMA

Soft power and global health diplomacy: the rise of France

Tara Ornstein, USC Center on Public Diplomacy

Global collision or international collaboration? Addressing a framework for cyber policy

Elizabeth Linder, Chatham House

The future of diplomacy takes root in cities

Nina Hachigian, City of Los Angeles and Penny Abeywardena, City of New York

Soft power platforms: old and new

The transformational (soft) power of museums: at home and abroad

Tristram Hunt, Victoria and Albert Museum

The quest for Reputational Security: interpreting the soft power agenda of Kazakhstan and other newer states

Nicholas J. Cull, USC Center on Public Diplomacy

Reimagining the exchange experience: the local impact of cultural exchanges

Jay Wang and Erik Nisbet, USC Center on Public Diplomacy

#UnknownJapan: inspiring travel with Instagram

Max Kellett, Portland

Table talk: bringing a Swiss Touch to the American public

Olivia Harvey, Portland

Soft power and the world's game: the Premier League in Asia

Jonathan McClory, Portland

Public diplomacy and the decline of liberal democracy

Vivian S. Walker, USC Center on Public Diplomacy

Fighting back: fake news, disinformation, and the question of sharp power

Max Kellett and Justin Kerr-Stevens, Portland

Hard laws, soft power

Philip Hall, Portland

Conclusion and look ahead

Trends and lessons

Going forward

Appendix

Appendix A – Metrics

Appendix B – References

Creator and Author



JONATHAN MCCLORY

Jonathan is the author of *The Soft Power 30* and a specialist in soft power, public diplomacy, cultural relations, and place branding. Based in Singapore, he is Portland's General Manager for Asia. He has advised senior government clients in the UK, Europe, and Asia on reputation, policy, and effective global engagement.

Before working in the private sector, Jonathan was Senior Researcher at the Institute for Government (IfG). While at the IfG, Jonathan created the world's first composite index for measuring the soft power of countries. This prior research helped inform the development of *The Soft Power 30*, which is now used as a benchmark by governments around the world.

PORTLAND

Portland is a strategic communications consultancy working with governments, businesses, foundations, and non-governmental organisations to shape their stories and communicate them effectively to global audiences.

USC CENTER ON PUBLIC DIPLOMACY

The USC Center on Public Diplomacy (CPD) was established in 2003 as a partnership between the Annenberg School for Communication and Journalism and the School of International Relations at the University of Southern California. It is a research, analysis, and professional education organisation dedicated to furthering the study and practice of global public engagement and cultural relations.

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| Warren Aspelng | Florence Feng | Henri Ghosn | Kate Joyce | George Kyrke-Smith |
Natalia Zuluaga Lopez | Kit Neill | Mary Peters | Melanie Thienard |

Contributors



Penny Abeywardena

Penny Abeywardena is the Commissioner for International Affairs at the New York City Mayor's Office for International Affairs. Penny was Director of Girls and Women Integration at the Clinton Global Initiative (CGI) from 2009 to 2014.



Nicholas J. Cull

Nicholas J. Cull is the Professor of Public Diplomacy and the founding director of the Master of Public Diplomacy program at USC. Nicholas is also a Faculty Fellow at the USC Center on Public Diplomacy.



Bijan F. Farnoudi

Bijan Farnoudi is the Head of Communications at the Kofi Annan Foundation. He was Head of Communications at the International Committee of the Red Cross (ICRC) from 2008 to 2013 in South Sudan, Nepal, Afghanistan, and Geneva.



Aidan Foster-Carter

Aidan Foster-Carter is an Honorary Senior Research Fellow in Sociology and Modern Korea at Leeds University. He has covered Korean affairs for Oxford Analytica and the Economist Intelligence Unit.



Nina Hachigian

Nina Hachigian is the Deputy Mayor for International Affairs in the Office of the Mayor of Los Angeles. Nina was appointed US Representative to ASEAN with the rank and status of Ambassador Extraordinary and Plenipotentiary from 2014 to 2017.



Philip Hall

Philip Hall is a Partner at Portland and leads the firm's disputes practice. He has particular expertise in litigation, conflict, and crisis communications, as well as developing complex digital campaigns for conflict and crisis situations.



Olivia Harvey

Olivia Harvey is an Account Manager at Portland. She specialises in developing communications strategies for governments, with a particular focus on soft power and public diplomacy.



Tristram Hunt

Tristram Hunt is the Director of the Victoria and Albert Museum. He was a Labour Party MP for Stoke-on-Trent Central from 2010 to 2017, and Shadow Secretary of State for Education from 2013 to 2015.



Dhruva Jaishankar

Dhruva Jaishankar is a Fellow in Foreign Policy Studies at Brookings India and the Brookings Institution in Washington DC. He was a Transatlantic Fellow with the German Marshall Fund in Washington DC from 2012 to 2016, where he managed the India Trilateral Forum.



Max Kellett

Max is a Senior Account Manager at Portland, where he advises clients across Asia and the Middle East on integrated communications activity. He has particular experience in digital communications and crisis management and has spent time embedded within government units. He also has a strong interest in how soft power and digital technology can be leveraged in pursuit of foreign policy priorities.



Justin Kerr-Stevens

Justin Kerr-Stevens is a Partner at Portland with expertise in capability building and digital strategy for governments in the Middle East, Central Asia, and Europe. He was a Strategic Communications Advisor to various ministries in the UK government from 2004 to 2012.



Lisa Koh

Lisa Koh is a Senior Account Executive at Portland. She specialises in developing and implementing communications strategies for government and philanthropic organisations, with a focus on East Asia.



Elizabeth Linder

Elizabeth Linder founded the Conversational Century in 2016 and serves as Chair of the Kinross House Meetings in Scotland. She is a Senior Consulting Fellow at Chatham House and Executive Director of Global Communications & External Affairs at Beautiful Destinations.



Richard McGregor

Richard McGregor is a Senior Fellow at the Lowy Institute with expertise in the politics and economies of East Asia, primarily China and Japan. He was the Financial Times bureau chief in Beijing and Shanghai from 2000 to 2009, and headed the Washington office from 2011 to 2015.



Erik Nisbet

Erik Nisbet is Assistant Professor in the School of Communication at The Ohio State University specialising in public diplomacy and foreign policy. Erik is also a Faculty Fellow at the USC Center on Public Diplomacy.



Ong Keng Yong

Ong Keng Yong is an Ambassador-at-Large at the Singapore Ministry of Foreign Affairs and Executive Deputy Chairman of the S.Rajaratnam School of International Studies at NTU. He was High Commissioner of Singapore to Malaysia from 2011 to 2014, and Secretary-General of ASEAN from 2003 to 2008.



Tara Ornstein

Tara Ornstein is a Multilateral Advisor for the US Agency for International Development (USAID). Tara is an international affairs and global health professional specialising in the management of international research and service delivery programmes.



Benjamin Rolfe

Benjamin Rolfe is the Chief Executive Officer of the Asia Pacific Leaders Malaria Alliance. He was the Pacific Lead Health Advisor at the Australian Department of Foreign Affairs and Trade from 2013 to 2014.



Patrik Silborn

Patrik Silborn is the Senior Director of Financing and Resource Mobilisation at the Asia Pacific Leaders Malaria Alliance. He was Head of the Private Sector Engagement Department at The Global Fund from 2014 to 2017.



Jonathan Soble

Jonathan Soble is a Visiting Fellow at the Asia Pacific Initiative. He was formerly the Tokyo correspondent for The New York Times and Tokyo bureau chief for the Financial Times.



Vivian S. Walker

Vivian S. Walker is a Faculty Fellow at the USC Center on Public Diplomacy, where she serves as Guest Editor for CPD Perspectives and is a Research Fellow at Central European University Center for Media, Data, and Society in Budapest.



Jay Wang

Jay Wang is the Director of the USC Center on Public Diplomacy and an Associate Professor at the USC Annenberg School for Communication and Journalism.



Zhang Yiwu

Zhang Yiwu is the Deputy Director of the Center of Cultural Resource Research at Peking University. He is a member of the 13th Political Consultative Committee, and a delegate of the Beijing Municipal People's Congress.

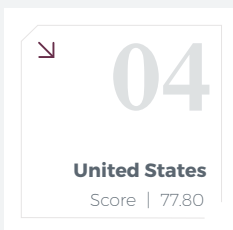
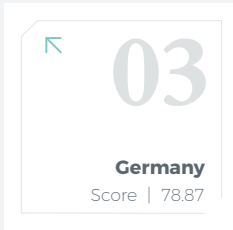
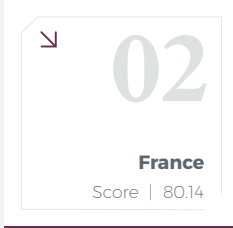
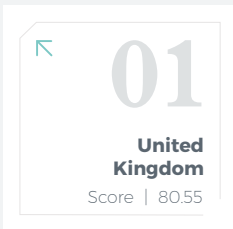
In memory of Dr. Martin Roth, 1955 – 2017

The 2018 Soft Power 30 report is dedicated to the memory of Dr. Martin Roth, former director of the Victoria & Albert Museum in London and of the State Art Collections in Dresden.

Dr. Roth was a champion for cultural internationalism and a believer in the power of art, culture, and dialogue to transcend borders and create meaningful connections between peoples. Dr. Roth worked tirelessly toward that objective for decades, creating opportunities for people all over the world to better understand and relate to one another through cultural experience and exchange. His work embodied the spirit of soft power and he saw its potential to bring about positive change in the world.

The Soft Power 30

2018 RESULTS



"In today's global information age, victory often depends not on whose army wins, but on whose story wins." This assertion from John Arquilla – often echoed by Joseph Nye – clearly conveys the utility of soft power and the importance of effectively communicating a winning global narrative. While this sounds a simple enough principle to follow, incorporating it into foreign policy practice is not so straightforward. From the outset of The Soft Power 30 series, we have sought to provide useful insights and practical guidance to overcome the first challenge of using soft power: identifying and measuring its sources.

In addressing this challenge, our mission has been to create a structure to manage the complexity of soft power and its numerous sources. At the same time, we have endeavoured to set our research in the global political context of today. In 2018, that context sees us moving ever faster towards a multi-polar and interdependent world. Power has become more diffuse, moving not just from West to East, but also away from governments, as more non-state actors play larger roles in driving global affairs. The acceleration towards greater interdependence is driven by the twin forces of globalisation and the digital revolution. Together, they have drawn the world closer by increasing the international flows of trade, capital, people, culture, education, and information. In doing so, greater interdependence has created both challenges and opportunities.

Over the last twelve months it has been the challenges – not the opportunities – that have dominated the wider debate on global affairs. Indeed, in 2018 there has been a growing swell of voices warning about the coming collapse of the current rules-based liberal international order. This report begins with a contextual analysis of the current state of global geopolitics. Looking at the major threats to the current liberal international order, we assess the validity of those threats, outline some potential reasons for cautious optimism, and consider the critical relationship between soft power and the future viability of the global order.

In setting this year's The Soft Power 30 report in such a grave context, we hope to concentrate minds on the importance of soft power in protecting, maintaining, and ultimately renewing the rules-based international order. Moreover, we aim to return discussion on soft power to its conceptual roots and definition as a critical foreign

| | | |
|--|--|--|
|  UPWARD MOVER |  DOWNWARD MOVER |  NO MOVER |
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policy approach used to align values, norms, objectives, and ultimately behaviours through attraction and persuasion. The ability to do exactly that at this time of geopolitical uncertainty, will be critical for those countries that are determined to shape the future of global affairs.

Fundamental to deploying soft power is a clear and accurate measurement of a nation's soft power resources. This is the aim of The Soft Power 30 index – the world's most comprehensive comparative assessment of global soft power. The index combines objective data and international polling to build what Professor Nye has described as "the clearest picture of global soft power to date".

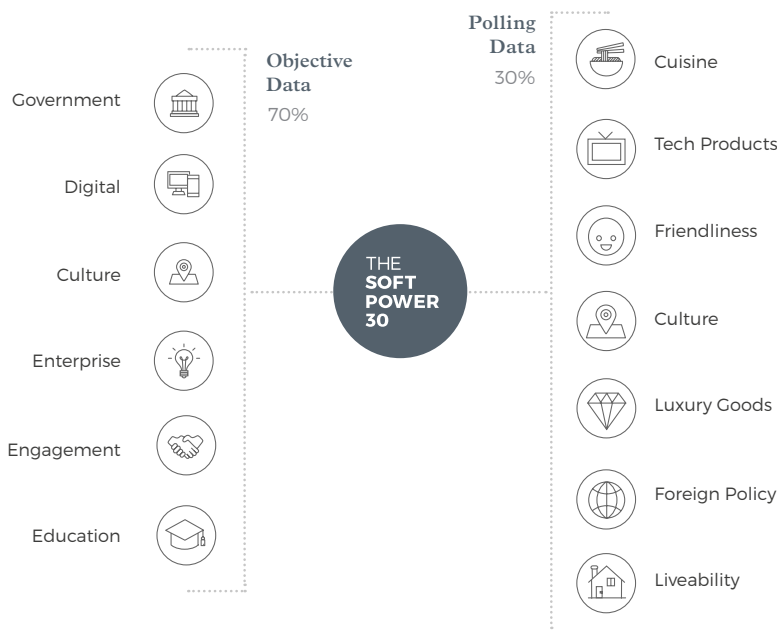
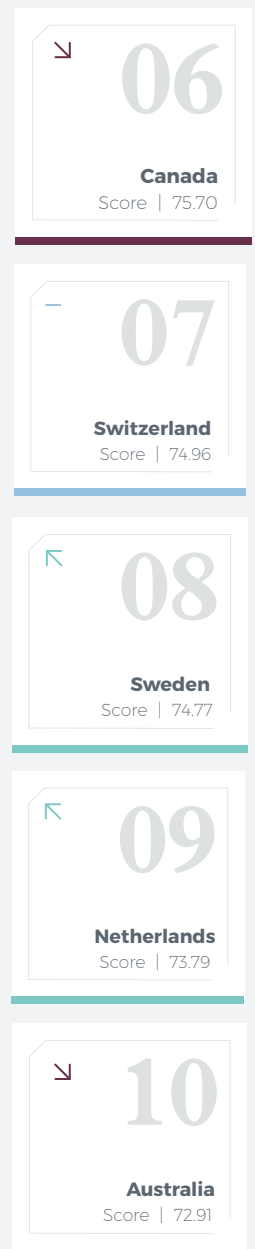


Figure 1 - The Soft Power 30 framework



The 2018 Soft Power 30 report reflects much of the global political change that is currently unfolding. This year we see the further erosion of American soft power under the banner of “America First”; Europe consolidating its soft power gains from 2017; and the continued rise of Asian soft power. Finally – and no doubt surprising to many – we see a robust soft power performance from the UK as the countdown to Brexit begins in earnest. As questions abound on the future of Britain’s role in the world, the UK can take some comfort in knowing it still commands considerable soft power resources.

The Soft Power 30 framework

Complementing the index’s set of objective metrics, we have again worked with Alligator Research to generate newly-commissioned polling data from 25 different nations, designed to gauge the appeal of countries’ soft power assets. Our polling surveys audiences in every region of the globe. We asked respondents to rate countries based on seven different categories including culture, cuisine, and foreign policy, among others.

In this fourth edition of The Soft Power 30, we put a much greater focus on Asia, with the addition of our first Asia Soft Power 10, pulling out the top ten performing Asian countries from our full dataset. Providing additional context and insight around this new index, the report features six new essays from expert contributors based around the region.

With the aim of delivering greater practical insights on soft power, public diplomacy, and digital engagement, this year’s report draws on our continued partnership with the University of Southern California’s Center on Public Diplomacy – the world’s first academic institution dedicated to the study of public diplomacy. USC’s Center on Public Diplomacy has a longstanding track record of bringing academic rigour to the discipline of public diplomacy, and translating cutting-edge research into actionable insights for diplomats and policymakers. In addition to contributions from USC’s CPD faculty, further essays and case studies authored by top analysts and professionals working at think tanks, NGOs, and the private sector, illuminate the latest trends in soft power and public diplomacy – both online and offline.

The report concludes with a final reflection on the key lessons and trends from the 2018 index, and a look to the year ahead and plans for the 2019 Soft Power 30 Index.



1.0

Introduction

In 1950, when the ashes of World War II were still smouldering, a prescient US National Security Council report identified the key challenge that would come to define America's role in the world for decades to come: "We need to face the fact that in a shrinking world the absence of order among nations is becoming less and less tolerable."¹ Addressing that "absence of order" has been the core objective of US foreign policy in the post-war era; and the process of constructing, maintaining, and protecting a resilient global order has been the cornerstone of modern American grand strategy. 68 years later, the unwavering constant of US foreign policy – to uphold the liberal international order – is no longer a constant but a question mark. If the original architect and guarantor of the liberal international order can no longer be seen as its champion, can the order hold and for how long? In 2018, this is the question vexing foreign policy circles around the world. The answer is far from certain, but if the liberal international order is to hold, it will be in large part due to the effective use of soft power by those of the world's leading nations that are committed to it – with or without American leadership.

While the construction of the post-war liberal international order is often viewed as a herculean, solo American undertaking, it was hardly a solitary endeavour. Indeed, without the collective efforts of closely allied free market democratic states, the liberal international order would not have come into being. Granted, American leadership and relative hard power were fundamental in building the global order in the middle of the twentieth century, but soft power – deployed to make effective multilateral collaboration possible – has been the sustaining force of the order in the decades since. The growing concern for the liberal international order shares

World events timeline August 2017 - June 2018

IMPACT KEY

- | | |
|------------|------------|
| ● Positive | ● Global |
| ● Neutral | ● Regional |
| ● Negative | ● Local |



an important link with the concept of soft power. As more analysts and commentators point to an order in crisis, policymakers, leaders, and diplomats need to pivot towards developing solutions to address it.

The effective use of soft power will be central to the design and implementation of any eventual solutions that are capable of holding the order together in the short term and strengthening it in the long term. As a result, a clear understanding of soft power, its sources, and its utility is more important than ever. Following the mission of previous reports in The Soft Power 30 series, this publication aims to provide new insights into the current global balance of soft power, highlight examples of best practice, and give an overview of the current geopolitical context facing government and non-government actors alike.

The concept of the "global order" may sound like a purely theoretical concern, but its constituent parts are practical, tangible, and identifiable. The components of the international order are a complex and extensive set of norms, institutions, treaties, alliances, and other mechanisms that foster economic stability, collective security, collaboration to solve global challenges, and – at their most ambitious – the promotion of liberal values like democracy.² These components have all evolved over the course of decades, adjusting (albeit slowly) to changes in technology, global challenges, and shifting geopolitics – like the rise of Asia.

Of course, the construction of the current liberal international order began not as a world-unifying project, but as a US-led Western initiative that melded together a collection of free, open, and prosperous states with the aim of constraining the Soviet Union, halting the spread of communism, and dealing with the risks and challenges of modernisation itself. At the same time, the Soviet Union built its own competing order through instruments such as the Warsaw Pact. Thus two parallel, competing structures constituted the wider global order for 40 years, which was generally held together by apex institutions like the UN Security Council.³



25.08.2017

An outbreak of violence between the Myanmar military and minority Rohingya population causes nearly 655,000 Rohingyas to flee to Bangladesh and at least 6,700 deaths.

September



01.09.2017

Casper Klynge takes office as Denmark's Ambassador for Technology and Digitization, the world's first official Tech Ambassador.

In the wake of communism's collapse in 1989, the "Western (or liberal international) order" effectively became the global order, as it was extended beyond the boundaries of the traditional Western world. The benefits that this order entailed were offered to those states that were willing to sign up to its core tenets – though in practice some were able to pick and choose which tenets they would uphold and which they would ignore.⁴ Over the subsequent decades bookending the turn of the millennium, the global order helped transform former communist and autocratic states into free market democracies, promoted greater international economic integration, powered strides in global development, and the liberal features of the order were ascendant. But as time marched on towards the 2010s, a debate on the future of the liberal international order began, and suddenly, confidence gave way to concern.

"America First" balks at cooperation and carries a "what's in it for us?" chip on its shoulder.

Returning to the present day, foreign policy thinkers – particularly those of a liberal internationalist persuasion – have been gripped by a palpable sense of despair. The source of that despair is an overriding fear for the continued survival of the liberal international order as it stands today. The doomsayers have been

numerous and the fears they feed are certainly justified. But reflecting on the last twelve months to July 2018, have those fears been realised? Is the liberal international order coming apart at the seams? In short: no. Does the order, however, sit at a precarious juncture at this point in history? Yes. Does the future of an effective liberal international order require a major collective enterprise to renew a shared vision and reform the institutions that underpin it? Definitely.

The current global order has proven to be resilient, navigating changes and crises over the decades since the end of World War II, but in its current form, it is far from unassailable. Even the dispassionate and level-headed International Relations scholar John Ikenberry has argued the liberal international order is in crisis.⁵ That might sound alarmist, but given rising volatility in national and international politics across the globe, there is clearly cause for concern.



22.09.2017

UK Prime Minister Theresa May addresses politicians in Florence, laying out plans for a two-year post-Brexit transition period.

October



01.10.2017

58 people are killed at a concert in Las Vegas after a gunman opens fire from a nearby hotel.



05.10.2017

The global #MeToo movement begins after The New York Times publishes an investigative report accusing Harvey Weinstein of multiple cases of sexual harassment.



While the global order is not unravelling entirely, it has been fraying for the best part of a decade – and more recently at an accelerated rate. This fraying has not gone unnoticed by analysts, researchers, and commentators and the debate on the fallibility of the global order began during the second term of the last Bush administration. By the early 2010s, a significant body of academic work was emerging, warning of the global order's eventual demise. Not only is this alarmist strand of thinking prolific, but there is also a surprising level of diversity in the arguments put forward on the threats to the global order.

Some analysts point to the failure of liberalism itself as the culprit behind the eroding international order.⁶ For others, globalisation is the cause of the breakdown in the wider liberal order, as traditional great powers lost their decisive grip on world affairs.⁷ Ikenberry even points to the liberal international order's success in bringing more states into the fold as a reason for its current crisis.⁸ While any predictions of an overnight collapse of the current liberal international order are hyperbolic, there are clear threats to its continued survival into the long term. If these threats are to be addressed, they first need to be accounted for and understood.



22.10.2017

Japanese Prime Minister Shinzo Abe's coalition secures a resounding victory in the country's general election.



27.10.2018

The Catalan regional parliament votes to declare independence from Spain, prompting the Spanish parliament to impose direct rule over the region.

November



21.11.2017

Zimbabwe's President Robert Mugabe resigns after 37 years of rule, succeeded by Emmerson Mnangagwa.

Disorderly conduct

Poring over the current threats to the future of the liberal international order, there is plenty to consider. Discounting lesser risks, we see three major threats to the current liberal international order: a wave of populist-nationalism in the West, a radically recalibrated US foreign policy, and rising powers challenging the status quo. These threats can be structured into two categories: systemic and transitory. The transitory threats – rooted in abrupt shifts in national politics – have injected a greater sense of urgency into the debate on the future of the liberal international order. As they have concentrated minds with such force, it is best to begin the analysis of threats with them.

One could point to 23 June 2016 as the precise moment when the plausibility of a genuine threat to the liberal international order truly came into focus. On that day, a narrow majority of voters in the UK rejected continued membership of the European Union. The referendum result has set Britain down the path of untangling itself from 40 years of economic, political, cultural, and security integration with its European partners. While the Brexit vote definitely served as the first warning shot to the global order, the real black swan moment came a few months later with the election of Donald Trump.

The Brexit and Trump election results were the headline grabbing events of 2016, but in reality, they serve as the standard-bearers for a much wider trend that constitutes the first threat to the liberal international order: the rising tide of populism in Western states. There is a fairly broad consensus that growing public perceptions of a broken link between globalisation and prosperity is a key driver of the populist-nationalist political backlash. The failure of democratic governments to deal with the domestic challenges brought on by globalisation, technological change, and automation have created an opening for populist politicians and parties to exploit. Though as recent academic research into the drivers of Brexit has shown, economics is only one side of the story. There is also a strong anti-immigration and identity politics component to the rise of populist nationalism in the West.⁹ Regardless of its causes, the threat that populist nationalism poses to the international order lies in the xenophobic, protectionist, and isolationist policies that populism espouses when dealing with the rest of the world. The last time nationalism and isolationism gripped Europe, the consequences were catastrophic. Isolationism, by definition, is a threat to the liberal international order. If the trend towards populism continues,



29.11.2017

North Korea launches the Hwasong-15 intercontinental ballistic missile, which scientists claim is capable of reaching mainland US.

December



14.12.2017

The FCC votes to dismantle net neutrality rules for US internet service providers.



17.12.2017

The price of one bitcoin reaches a record high of \$19,783.06.

there is a real risk that more and more states will adopt isolationist, nationalist, and protectionist foreign policies. All of which significantly undermine the liberal international order.

The second major threat to the liberal international order stems from the first, and is – in effect – the manifestation of populism in foreign policy. The inauguration of Donald Trump has sparked panic amongst some foreign policy analysts who claimed to hear “the death knell of the world as it was”.¹⁰ The rhetoric of “America First” is firmly anchored in a populist-nationalist mindset that views every conceivable international engagement in zero-sum terms. There must be a winner and a loser in every transaction. “America First” balks at cooperation and carries a “what’s in it for us?” chip on its shoulder. There have been plenty of worrying signals from the White House that have flummoxed US allies, from launching trade wars to undermining the collective defence principle of NATO. Filtering out the noise, a set of three radical changes to US foreign policy since January 2017 have put considerable strain on the current liberal international order, and set the US needlessly at odds with some of its closest allies. These three changes – collectively a major departure from bi-partisan American foreign policy orthodoxy – represent the second, but arguably most urgent, threat to the liberal international order. So significant is this threat, that each of these American foreign policy shifts warrants consideration.

The first radical change came only days after Trump took office, when it was announced that the US was abandoning the Trans-Pacific Partnership (TPP). This was the twelve-country trading bloc bridging the Pacific Ocean and linking states from North America, South America, and Asia Pacific. While framed as a purely economic decision, the Trump administration seems to have ignored the fact that the TPP was designed not just as a vehicle to enhance trade, but also to serve as a geopolitical bulwark against rising Chinese influence in the Pacific. US Senator John McCain called the decision to renege on the deal a serious mistake, saying “it will send a troubling signal of American disengagement in the Asia Pacific region at a time we can least afford it”.¹¹ The collapse of TPP immediately established the tone for the Trump Administration’s approach to trade and multilateralism more broadly. Namely, that the US has no interest in collaborating with allies in multilateral forums and that every trade relationship will be used to extract as much economic value as possible for the US, with no



concern for the wider strategic implications of pursuing such narrow objectives. 2018 has seen a continuation of this approach, as the US has ignited a trade war with its closest allies and, following a summit in June, left in question the continued existence of the key coordinating body of leading industrialised nations, the G7.

The second change to US foreign policy at odds with the liberal international order was America's withdrawal from the Paris Climate Agreement, announced in August 2017. This decision has left the current US administration the single most isolated government on the planet with respect to the issue of climate change. It remains unclear what the environmental effects of this decision will be, but the real damage has been to America's reputation – and to the principles of multilateral cooperation at large. It sends a worrying signal with respect to the future of international collaboration on global challenges in general. Moreover, it suggests that the US is a negligent great power at best, and a selfish, malevolent one at worst.

The third change in US foreign policy was the unilateral exit from the Joint Comprehensive Plan of Action (JCPOA) – better known as the Iran nuclear deal. Outside of the immediate concerns around what this means for global nuclear non-proliferation efforts, there are two negative knock-on effects worth highlighting. The first is that every subsequent effort to strike a diplomatic accord with the United States in the future will be undermined by an inherent doubt as to whether the US will live up to the deal. How can any world leader now trust the US to keep its word and implement new international agreements beyond the current term of any sitting US President? Second, pulling the US out of the JCPOA has driven another wedge between the US and its European allies. It is, at the time of publication, too early to know the full impact of the US rejecting the JCPOA and returning to a sanctions regime on Iran. However, the discord between Europe and the US on the issue is yet another significant point of contention on a growing list of enmity-inducing issues that have shaken the transatlantic relationship to its core.

The above three major changes to US foreign policy best encapsulate the Trump doctrine, which is driven almost exclusively by a populist-fuelled "America First" battle cry. Taken together, these shifts in policy create an inconsistent and unpredictable US foreign policy that gives America the paradoxical look of a great power in retreat, as well as a bully looking to extort as much as possible



14.02.2018

17 people are killed in a shooting at Stoneman Douglas school in Florida, US. The tragedy sparks mass demonstrations from students around the US demanding action on gun safety.



14.02.2018

South African President Jacob Zuma resigns amidst allegations of corruption and pressure from his own party.



25.02.2018

Chinese President Xi Jinping proposes plans to scrap the two-term presidential limit from the Chinese constitution.



The combined forces of globalisation and technology serve to bind countries together, not tear them apart, as some would argue.

from as many possible. As the original architect and underwriter of the liberal international order, an America not just reluctant to uphold the order, but actively hostile to it, creates tremendous uncertainty. If the current liberal international order is largely an American construct, where does a retreating US leave the future of that order?

This brings us to the third major threat to the global order, which is the systemic, long-running trend of an era-defining shift of power from West to East.¹² In theoretical terms, this means a shift from a unipolar world to a multipolar one. In practical terms, this means after two decades as the global hegemon, the US is transitioning from a position of global dominance, to one of shared leadership (as a best-case scenario).¹³ The shift in power from West to East is not a threat to the global order per se. However, the potential threat to



28.02.2018

Russia's membership to the International Olympic Committee (IOC) is restored following its suspension over state-sponsored doping.

March



04.03.2018

German Chancellor Angela Merkel forms her fourth government after members of opposition party Social Democrats vote in favour of another grand coalition.



04.03.2018

Russian ex-spy Sergei Skripal and daughter Yulia are found collapsed in the UK after a suspected nerve agent attack. The chemical is found to have been developed by Russia, prompting the UK and 26 allied countries to expel 130 Russian diplomats.

the liberal international order lies in how rising powers, most prominently China, use their newfound influence. If rising powers – like China – see the current order as unfairly advantageous to US interests, they could seek to upend it. In addition to a direct challenge from a rising power, the other threat to the order is a return to fragmented, chaotic geopolitics, where the lack of a globally-engaged US hegemon results in a breakdown of global order and a set of closed, competing regional spheres of influence.

Order up?

The above three major trends – rising populist-nationalism in the West, a radically recalibrated American foreign policy, and the risk of rising powers challenging the status quo – constitute the primary threats to the liberal international order. Taken at face value, these three threats look daunting and they paint a worrying picture for the future of that order. However, there are reasons to believe that the order – the norms, institutions, and mechanisms that facilitate the rules-based conduct of global affairs – is resilient enough to successfully negotiate these threats and continue to evolve in a way that will accommodate the rapidly changing geopolitical and economic context. We see four reasons why the current state of panic on the liberal international order may be overdone and, with some work, it may yet have a bright future.

First, while plenty of commentators despair at the direction of US foreign policy under Trump, it may – in the long term – not be as disruptive as feared. Even the most discordant shifts in policy can eventually be reversed by the next US President. Should the next President re-align American foreign policy with pre-Trump orthodoxy, the “America First” doctrine will look like a temporary aberration. Moreover, the federal government – while the predominant foreign policy actor – is only one of many actors that engage with the world on America’s behalf. Said differently, America is much more than the White House. An illustration of this fact can be found in the network of American governors, mayors, companies, and philanthropies that have delivered a coordinated response in direct opposition to President Trump’s decision to pull the US out of the Paris Climate Agreement. The response of this network means that despite White House policy, a coalition of public and private sector actors are committed to keeping the US on track to meet its obligations under the Paris Agreement. This effectively means that, on the issue of climate change, the actual American foreign policy being delivered stands in direct opposition to the stated aims of the US federal government.



19.03.2018

President Vladimir Putin secures an overwhelming victory in the 2018 Russian presidential election.

April

The shift in power from West to East is not a threat to the global order per se. However, the potential threat to the liberal international order lies in how rising powers, most prominently China, use their newfound influence.

Second, the vast majority of leading states remain invested in the current structures of the liberal international order and are moving to reinforce it in the absence of American leadership. In Europe, the EU is moving to compensate for the global diplomatic deficit left by the US and take a much more active role in helping to preserve the current order through more concentrated efforts in global security, trade, regulation, and environmentalism.¹⁴ The way the EU's new General Data Protection Regulation has driven changes to the way Internet companies around the world operate is a testament to the EU's global rule-setting power.¹⁵ In the Asia Pacific region, liberal-minded countries are also taking action in the absence of US leadership. This is most clearly demonstrated in the resurrection of the TPP, which was repurposed by the eleven remaining nations and signed in March 2018 as the Comprehensive and Progressive Agreement for Trans-Pacific Partnership. That the trading bloc was saved in the absence of US economic and diplomatic leadership illustrates that the natural pull towards order and collaboration remains alive and well for nearly all liberal nations.

Third, the argument that rising powers like China or Russia might seek to upend the liberal international order is not (yet) credible. While China and Russia have bristled at some aspects of the liberal international order, neither has sought to challenge it in a fundamental way. China has benefitted immensely from the current order, as export-led development has seen China modernise, develop, and pull hundreds of millions of its citizens out of poverty. While China has started creating multilateral institutions in its own image – like the Asian Infrastructure Investment Bank – it is not about to build a comprehensive system of structures designed to replace those that uphold the liberal international order. In fact, Chinese President Xi Jinping's 2017 speech to the World Economic Forum in Davos made clear China's intentions to support the current international order. Whether actions follow words remains to be seen, but Xi's speech signalled that China would not seek a wholesale challenge to the current global order. Moreover, China's model, while effective for China, does not translate so well into a system for organising the global order. Russia is often mentioned in the same breath as China in discussions on a challenge to the world order. But in reality, Russia does not have the means to challenge the current order. As the Kremlin has so aptly demonstrated over the last few



04.04.2018

The 2018 Commonwealth Games opens in Australia.



14.04.2018

The US, UK, and France launch strikes against targets in Syria in response to an alleged chemical weapons attack on civilians in Damascus.

years, it can play spoiler: frustrating international collaboration, stringing out conflicts, and sowing political discord in rival countries. Russia is not, however, a place that is looked to for genuine solutions to major global challenges. Moreover, a new international order constructed by Russia, on its terms, is simply not a plausible outcome.

The fourth and final reason the liberal international order is more likely to survive than not is that the combined forces of globalisation and technology serve to bind countries together, not tear them apart, as some would argue. The centripetal forces of economic interdependence, instant communication, and the global nature of today's major challenges means that cooperation is often the first best option in conducting foreign policy. Cooperation is best served by a clear, rules-based order with institutions to facilitate collaboration and mitigate (or resolve) conflicts. The combination of norms, rules, networks, and multilateral institutions that constitute the current international order are thus sustained by the need to make relations, transactions, and collaboration as frictionless and easy as possible.

While the four points above should stave off total panic on the future of the liberal international order, securing that future, is going to take significant collective action from the world's leading nations. That action, we would argue, is going to rest heavily on soft power. At the macro-level, the liberal international order is in need of a new, shared vision. Constructing a new shared vision and ensuring that it has the support of the vast majority of states will be a process that hinges on soft power. A much broader range of states – all at different stages in their economic and political development – will need to reach consensus on the broad outlines of how global affairs should be conducted. If agreement can be reached among the majority of nations, then the next step will be meaningful reform of the multilateral institutions that uphold the liberal international order.

This, again, will be an undertaking where soft power, and nations' ability to use their soft power toward this end, must play a central role in delivering an improved, secure, and stable global order. Remaining consistent with Joseph Nye's definition of soft power, in this context, it means the strategic use of attraction and persuasion to bring about a global consensus on how to overhaul the liberal international order.



16.04.2018

The 2018 Commonwealth Heads of Government Meeting (CHOGM) is held in London.



27.04.2018

Kim Jong-Un meets with South Korean counterpart Moon Jae-in to discuss an end to hostilities and denuclearisation of the Korean peninsula, marking the first summit between the two countries in more than a decade.



27.04.2018

Singapore announces plans for the ASEAN Smart Cities Network to accelerate technological innovation among its ten member-states.

Without question, the survival of the liberal international order will depend on a collaborative effort to deliver reform. How that reform eventually plays out will, in large part, be determined by how Asia grows into its rapidly expanding role in the world. The rise of Asia is one of the most discussed trends in international relations, economics, and business; and in all likelihood, the future of the liberal international order will be decided in Asia. As a region, Asia already accounts for one third of the world's total economic output – larger than any other – and its share will only continue to grow. As Asia translates its economic largesse into international influence, the big decisions taken in the region will be instrumental in determining the future of the international order.¹⁶

The 2018 Soft Power 30

As Asia's role in driving the global agenda evolves and expands, the 2018 edition of The Soft Power 30 explicitly recognises the shifting global power dynamics brought on by Asia's rise. This year's report features a new chapter dedicated exclusively to Asian soft power. As part of a larger focus on Asia, we have used our full data set of countries – 60 in total – to produce a new Asia Soft Power 10. The resulting top ten ranking uses the same methodology as our Soft Power 30 model, arranging the ten best performing Asian countries into a new league table. Asia Soft Power 10, reported in Chapter 4, represents the most significant development to date in The Soft Power 30 series of reports.

With the exception of the new Asia Soft Power 10, the 2018 report follows the same structure as previous years. Chapter 2 provides a brief review of the methodology used to construct the index and calculate country rankings. Chapter 3 then reports the 2018 results, and gives an overarching analysis by looking across the top five countries, giving a breakdown of the six different sub-indices, and pulling insights from the international polling data.

Following an overview of the results and analysis, Chapter 4 covers the new Asia Soft Power 10 ranking. Importantly, Chapter 4 also provides some useful context on soft power in the region, featuring a set of essays that explore some of the most pressing issues in Asia Pacific through a soft power lens. Leading practitioners and commentators from around the region provide some excellent insights on the changing nature of geopolitics and soft power in Asia.

May



09.05.2018

President Donald Trump withdraws from the Joint Comprehensive Plan of Action nuclear agreement between Iran and members of the UN Security Council.



09.05.2018

Former Malaysian Prime Minister Mahathir Mohamad wins the Malaysian general election, leading the first opposition party victory in 61 years.



14.05.2018

The US opens its Embassy in Jerusalem. At least 52 Palestinians are killed and 2,400 wounded on a day of violent clashes between protestors and the police.

The report then turns an eye to the practical, with two chapters exploring soft power in action. Chapter 5 is built around "new coalitions of the willing", where networks and non-state actors are working to drive change in important areas of global affairs. Chapter 6 looks at platforms – both new and old – for generating and leveraging soft power through a diverse set of case studies from state and non-state actors alike. Both of these chapters benefit from the partnership between Portland and the University of Southern California's Center on Public Diplomacy. Similar to last year, USC's faculty have contributed several essays to this year's report, all of which reinforce this project's utility for foreign policy practitioners.

Finally, the report concludes with a look at the key lessons and trends from the 2018 index, as well as a look to the year ahead and plans for the 2019 Soft Power 30.

From the outset of this now four-year-old research project, we have sought to establish a clear framework with which to measure the soft power resources of the world's most influential nations. In doing so, our index produces an annual snapshot in time of global soft power. This snapshot allows us to compare the world's leading countries according to their soft power assets. As we have said before, the results do not provide a ranking of overall global influence, but rather the potential for influence. We are, of course, aware of the shortcomings of our index, but maintain that it is the best available and most comprehensive measure of the global distribution of soft power.

Last year's report warned of a sizable upswing in geopolitical volatility, and underlined the global rebalancing of power underway. One year on, it has become clear that this volatility has fuelled growing concern for the very future of the liberal international order. If last year was a warning that world politics were shifting into a period of instability, this year provides confirmation that concerns are justified, and the threats to the global order are real. But on balance, we think there is still cause for cautious optimism – though to maintain that optimism, soft power will need to carry the day.



19.05.2018

Prince Harry marries American actress Meghan Markle in Windsor.



25.05.2018

The General Data Protection Regulation comes into force in the EU.



June



01.06.2018

A coalition government between the Five Star Movement and League Party is formed in Italy.



05.06.2018

The one-year anniversary of the blockade of Qatar by Saudi Arabia, UAE, Egypt and Bahrain is marked.



For the liberal international order to secure a lasting future, changes will need to be made. Identifying what those changes are and how they are brought about is well beyond the scope of this research project. However, soft power will have to play a prevailing role for such a process to succeed. As the future of the liberal international order becomes an ever more urgent foreign policy priority, governments and diplomats will need a renewed focus on developing and leveraging their nations' soft power. The following report aims to provide new and relevant soft power insights to the leaders, diplomats, and non-state actors who are striving to promote and uphold an effective global order in these turbulent times.



08.06.2018

The G7 Summit is held in Quebec. All countries agree to a joint summit communiqué, but Donald Trump rescinds US support after a disagreement with Canada over trade tariffs.



12.06.2018

A historic summit between North Korea and the US is held in Singapore.



14.06.2018

The 2018 FIFA World Cup starts in Russia.

2.0

Methodology of the index

- 2.1 Objective data

- 2.2 Subjective data

- 2.3 Changes, challenges, and
limitations

The threats to the current liberal international order set out above should be seen as an urgent call to action for leaders, diplomats, and foreign policy makers. Without question, those charged with shaping foreign policy need to be ready for not just uncertainty, but also awake to the possibility of the disintegration of the global order. As state and non-state actors face up to the challenges of maintaining the liberal international order, they will need to adjust strategies accordingly. For governments, the soft power resources at their disposal will be a critical part of the foreign policy tools needed in the geopolitical environment going forward.

Those states most adept in using soft power to facilitate positive collaboration will be better placed to weather the current uncertainty and geopolitical instability, and hopefully work to uphold and reshape the order for the better. This leads to the question: how can soft power be deployed effectively? As we have referenced in our previous reports, Joseph Nye's own model for the conversion of soft power into a desired outcome comprises five steps.¹ As shown in Figure 2, the first step in the process of converting soft power into a successful outcome is identifying the resources that will affect the target(s) in question.

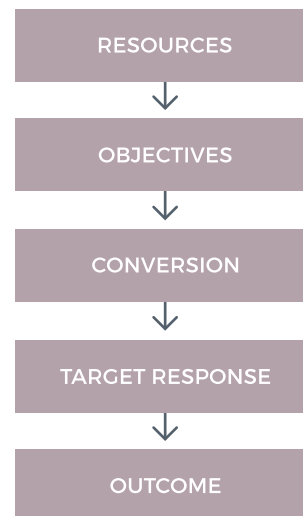


Figure 2 - Soft Power Conversion Process

Source:
Nye, J. (2011)
The Future of Power

As illustrated by Nye's model for converting soft power, the process must start with a clear account of available resources and an understanding of where they will be effective. It is at this first hurdle – measurement – that most governments stumble. This, however, is understandable as the difficulty of measuring soft power is well-documented.²

Nye has previously pointed to three primary sources of soft power: culture, political values, and foreign policy.³ Based on a comprehensive review of academic literature on the subject, The Soft Power 30 framework builds on Nye's three pillars, capturing a broad range of factors that contribute to a nation's soft power. The Soft Power 30 index assesses the soft power resources of countries by combining both objective and subjective data. A list of the metrics can be found in Appendix A. Additionally, the 2015 Soft Power 30 report contains a longer discussion of the methodology of the index.⁴

2.1

Objective data

The objective data is drawn from a range of different sources and is structured into six categories, with each category functioning as a sub-index with an individual score. As with previous years, the six sub-indices are: Government, Culture, Global Engagement, Education, Digital, and Enterprise. The framework of categories was built on a survey of existing academic literature on soft power. Figure 3 below illustrates the six sub-indices that constitute The Soft Power 30 index.

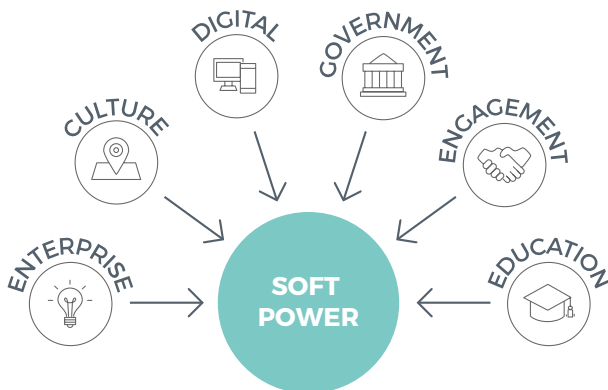


Figure 3 -
The Sub-Indices

The Government sub-index is designed to assess a state's political values, public institutions, and major public policy outcomes. By including measures like individual freedom, human development, violence in society, and government effectiveness, the Government sub-index gauges the extent to which a country has an attractive model of governance and whether it can deliver broadly positive outcomes for its citizens. Potential partners for international collaboration

are more likely to be drawn to states with well-functioning systems of government.⁵

When a country's culture promotes universal values that other nations can readily identify with, it makes them naturally attractive to others.⁶ The reach and volume of cultural output is important in building soft power, but mass production does not necessarily lead to mass influence. As a result, our index includes measures of culture that serve to capture both the quality and the international reach and appeal of a country's cultural production. The Culture sub-index includes measures like the annual number of international tourists, the global success of a country's music industry, and even a nation's international sporting prowess.

The Global Engagement sub-index aims to measure a country's diplomatic resources, global footprint, and overall contribution to the international community. Essentially it captures the ability of states to engage with international audiences, drive collaboration, and ultimately shape global outcomes. The Global Engagement sub-index includes metrics such as the number of embassies/high commissions a country has abroad, membership of multilateral organisations, and overseas development aid.

The ability of a country to attract foreign students, or facilitate exchanges, is a powerful tool of public diplomacy, even between countries with a history of animosity.⁷ Prior research on educational exchanges gives empirical evidence for the reputational gains that accrue to a

host country when foreign students return home.⁸ Foreign student exchanges have also been shown to have positive indirect "ripple effects" when returning students advocate on behalf of their host country of study.⁹ The Education sub-index aims to capture this phenomenon as well as the contribution countries make to global scholarship and pedagogical excellence. Metrics in this sub-index include the number of international students in a country, the relative quality of its universities, and the academic output of higher education institutions.

Though elements relating to the economy may seem more of a hard than soft power concern, the Enterprise sub-index is not a measure of economic power or output. Rather, this sub-index aims to capture the relative attractiveness of a country's economic model in terms of its competitiveness, capacity for innovation, and ability to foster enterprise and commerce. Economic might is more associated with hard power, but a country's economic attributes can make a significant contribution to its soft power as well. Core elements of a nation's economy like ease of doing business, corruption levels, and start up costs for a new business all play a role in how a country is seen from outside.

The Digital sub-index brings an important new component to the measure of soft power. The ways that technology has transformed everyday life over the last two decades is hard to over-exaggerate. Media, commerce, government, politics, and our daily social interaction have all changed with technology. The same can be said of foreign policy, the practice of public

diplomacy, and soft power. The inclusion of a Digital sub-index aims to capture the extent to which countries have embraced technology, how well they are connected to the digital world, and their use of digital diplomacy through social media platforms.

2.2 Subjective data

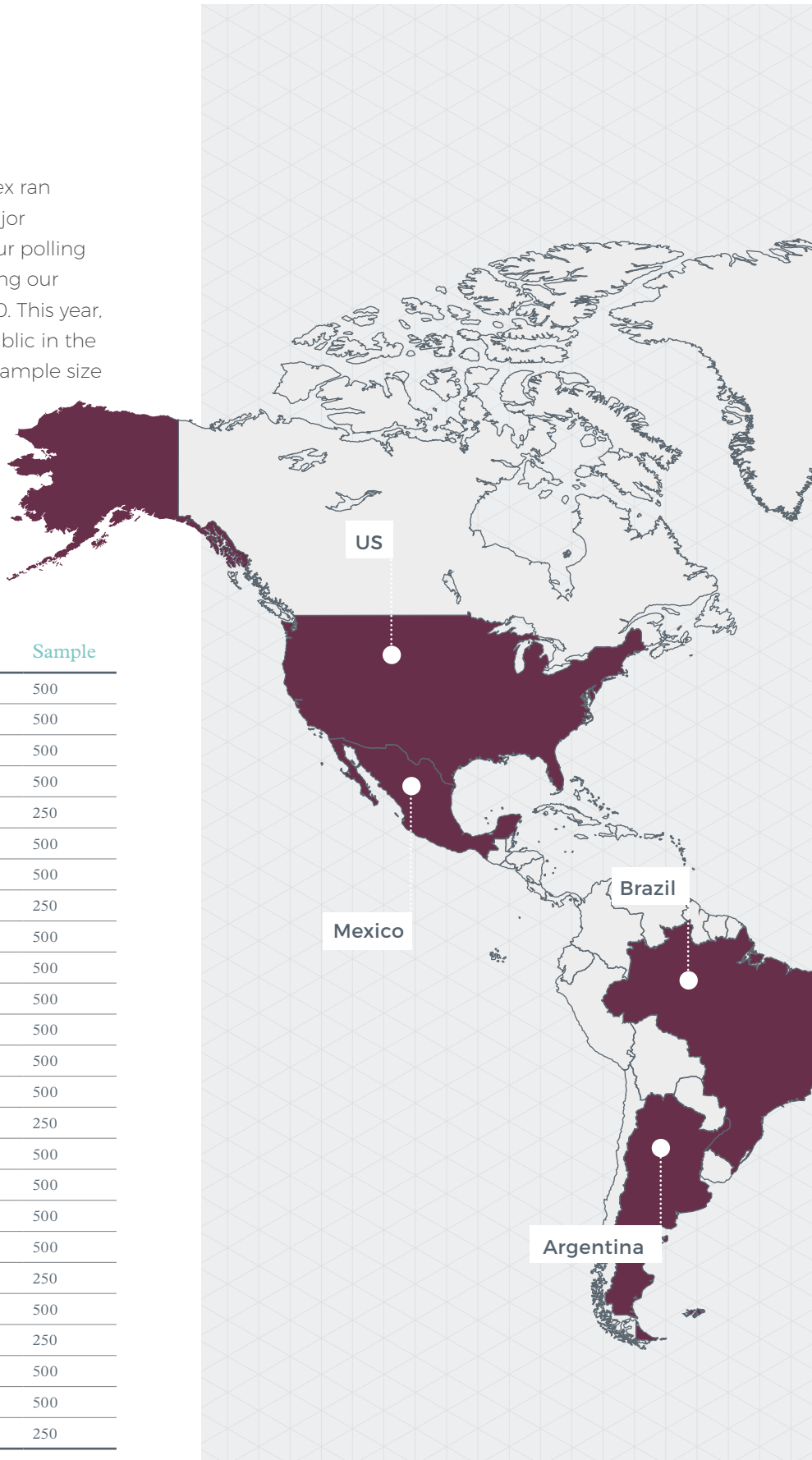
One of the biggest challenges to measuring soft power accurately is its inherently subjective nature. Rather than attempting to design against subjectivity, The Soft Power 30 index embraces it. The inaugural Soft Power 30 index published in 2015 was the first to measure soft power by combining objective data and international polling. As in 2017, we followed the same framework this year, using specially commissioned polling across 25 countries as the subjective data for the index.

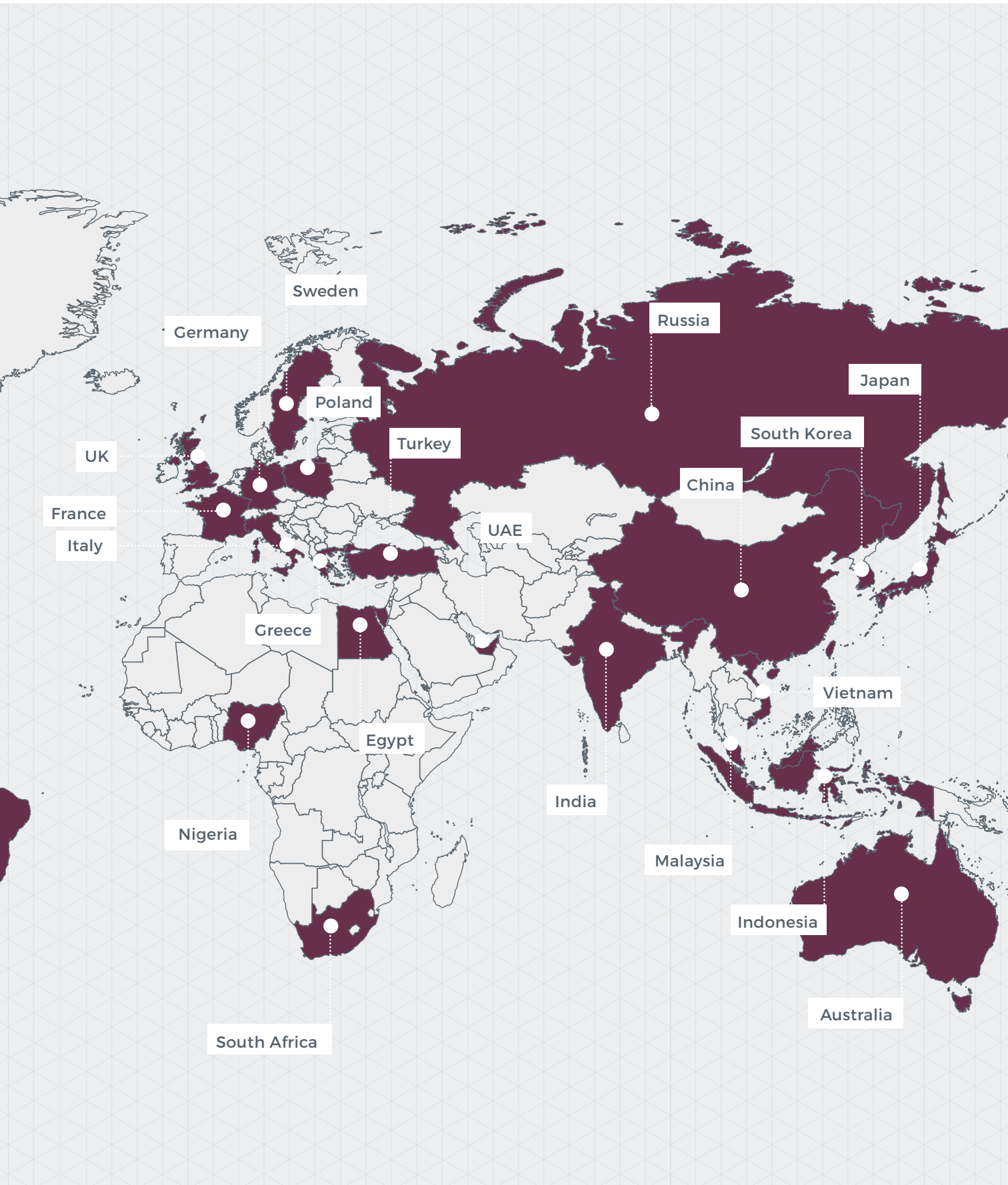
Based on an overview of existing academic literature on soft power, we developed a series of short questions. The polling provides data on international perceptions based on the most common "touch points" through which people interface with foreign countries. The list of questions can be found in Appendix A, with the full list of metrics.

International polling for the index ran across a range of the world’s major regions. In 2016 we expanded our polling to 25 countries, up from 20, taking our sample size from 7,200 to 10,500. This year, we ran polling of the general public in the same 25 countries. In 2017, the sample size was increased to 11,000, and it remains the same for our 2018 polling. Countries polled for this year’s study are given in the table below:

| Country | Region | Sample |
|--------------|----------------------------|--------|
| Argentina | Latin America | 500 |
| Australia | Australasia | 500 |
| Brazil | Latin America | 500 |
| China | East Asia | 500 |
| Egypt | Middle East & North Africa | 250 |
| France | Europe | 500 |
| Germany | Europe | 500 |
| Greece | Europe | 250 |
| India | South Asia | 500 |
| Indonesia | Southeast Asia | 500 |
| Italy | Europe | 500 |
| Japan | East Asia | 500 |
| Malaysia | Southeast Asia | 500 |
| Mexico | Latin America | 500 |
| Nigeria | Sub-Saharan Africa | 250 |
| Poland | Europe | 500 |
| Russia | Europe/Asia | 500 |
| South Africa | Sub-Saharan Africa | 500 |
| South Korea | East Asia | 500 |
| Sweden | Europe | 250 |
| Turkey | Middle East & North Africa | 500 |
| UAE | Middle East & North Africa | 250 |
| UK | Europe | 500 |
| USA | North America | 500 |
| Vietnam | Southeast Asia | 250 |

Total Sample: 11,000





The samples within each country were representative by age, gender, and region. The full sample was designed for broad coverage of a diverse range of cultures, rather than to be precisely representative of global opinion.

The survey consisted of a series of questions translated into the main language(s) of each country by native speakers, using an 11-point numeric answering scale (0 to 10) to avoid the risks associated with translating verbal answering scales. Different cultures have been found to have different approaches to answering numeric scales (e.g. tending towards central or extreme scores), but the normalisation of the data mitigates against this.

The following factors were covered in the polling (each rated on a 0-10 scale, where 0 represented a very negative opinion, and 10 represented a very positive opinion):

- Favourability towards foreign countries;
- Perceptions of cuisine of foreign countries;
- Perceptions of how welcoming foreign countries are to tourists;
- Perceptions of technology products of foreign countries;
- Perceptions of luxury goods produced by foreign countries;
- Trust in foreign countries' approach to global affairs;
- Desire to visit foreign countries to live, work, or study;
- Perceptions of foreign countries' contributions to global culture.

These eight metrics were used to develop a regression model, where "favourability towards foreign countries" was the dependent variable, and the remaining questions were independent variables. This measured the extent to which the remaining perceptions predict favourability towards a country in the dataset. The regression model allowed each metric to be appropriately weighted, to minimise the impact of any bias in the choice of questions.

2.3

Changes, challenges, and limitations

For this fourth iteration of The Soft Power 30, very little has been changed from last year's framework. We have followed the same methodology and the metrics criteria have remained the same. In total only three minor changes were made for the 2018 index. The first change was simply to update all of our metrics with the most recently available data, and of course, run new polling. The new polling was in the field from 8th to 17th May 2018.

The second change comprised three alterations to objective data. The first was to drop tertiary education enrolment rates as a metric in the Education sub-index, while replacing it with student-to-teacher ratio as an Education metric. The second alteration was to drop the SME employment metric from the Enterprise sub-index, as on review it was not measuring what we had intended. The third alteration was to add a new metric to the Government sub-index, the World Happiness Index, which is produced by the United Nations.¹⁰ Well-being has

become more of a priority for governments around the world, with many making the improvement of citizen well-being an explicit, measurable policy objective. As it is a good proxy for public policy outcomes, we have included it in the Government sub-index for 2018.

The final change was updating the weighting for the international polling data. As with each year, we run a regression analysis on the polling data against overall favourability responses for

countries. This yields a weighting for the polling categories that provides insight into what drives sentiment towards countries. For this year, we decided to make use of multiple years' worth of data and produced an average weighting for the polling categories based on multi-year data, which is shown in Figure 5 below. Weighting for the objective data follows the same values used for last year and is reported in Figure 6. Each set of the sets of weightings is scaled to 100 for ease of comparison.

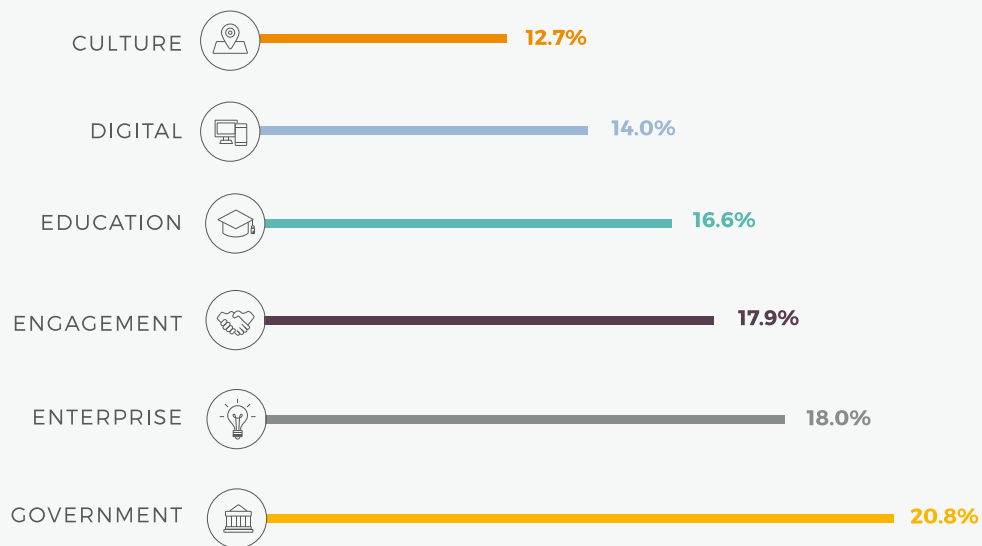


Figure 5 -
Weighting of the objective sub-indices

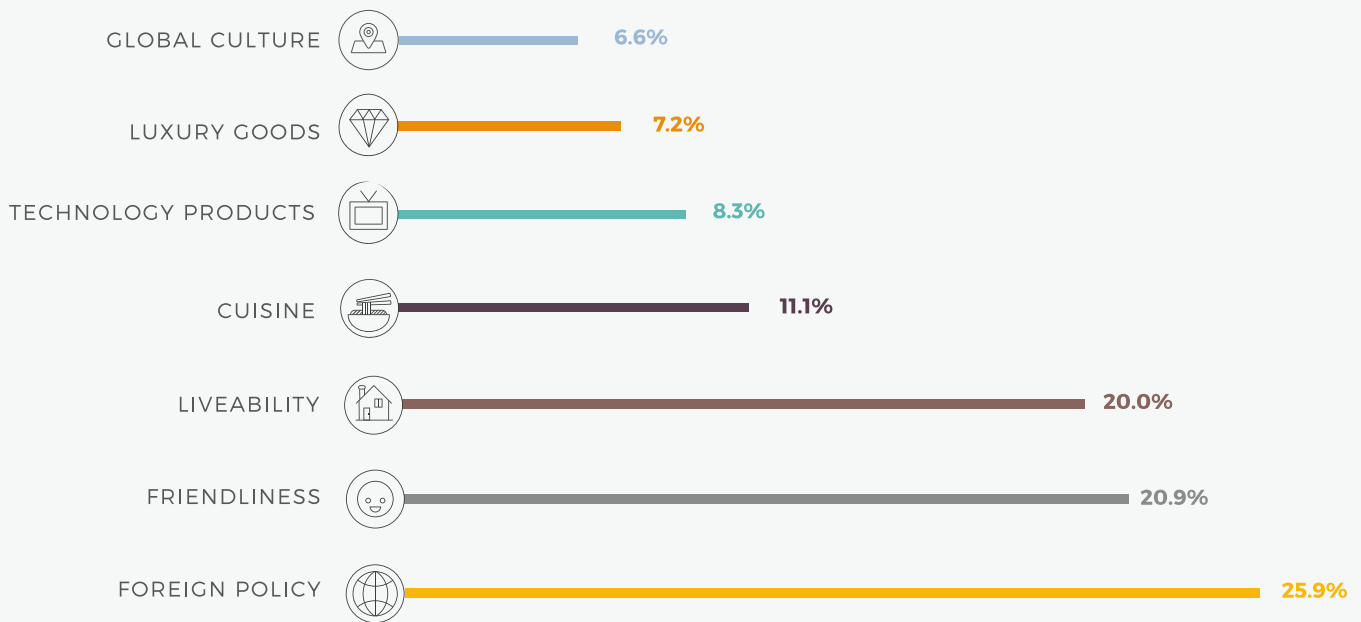


Figure 6 -
Weighting of the polling categories

As with every composite index, ours is not without its limitations and shortcomings. The subjective nature of soft power makes comparison across all countries difficult. Moreover, the total complexity of the dynamics of inter-state relations – where soft power is brought to bear – cannot be fully rendered by a comparative global index.

However, the index continues our overarching objective to develop an accurate comparative index of soft power resources. It is both our plan and our hope that future versions of this index will continue to improve incrementally in providing an accurate assessment of global soft power. Building a larger data set of countries, improving the objective metrics, establishing a stronger case for the weighting of indicators, and increasing the reach and scope of the international polling will all be priorities for future

iterations. The growing importance of the digital components of soft power – used for both benevolent and malevolent ends – is an issue we continue to grapple with and think about in terms of how best to measure. Alas, much more remains to be done on this issue. We recognise that reaching the ultimate goal of a definitive measure of soft power will be a long and iterative process. The work for this fourth iteration of The Soft Power 30 index was undertaken – as ever – in the hopes of making further progress against the measurement challenge.



3.0

Results and analysis

3.1 The top five

3.2 Breaking down the objective data

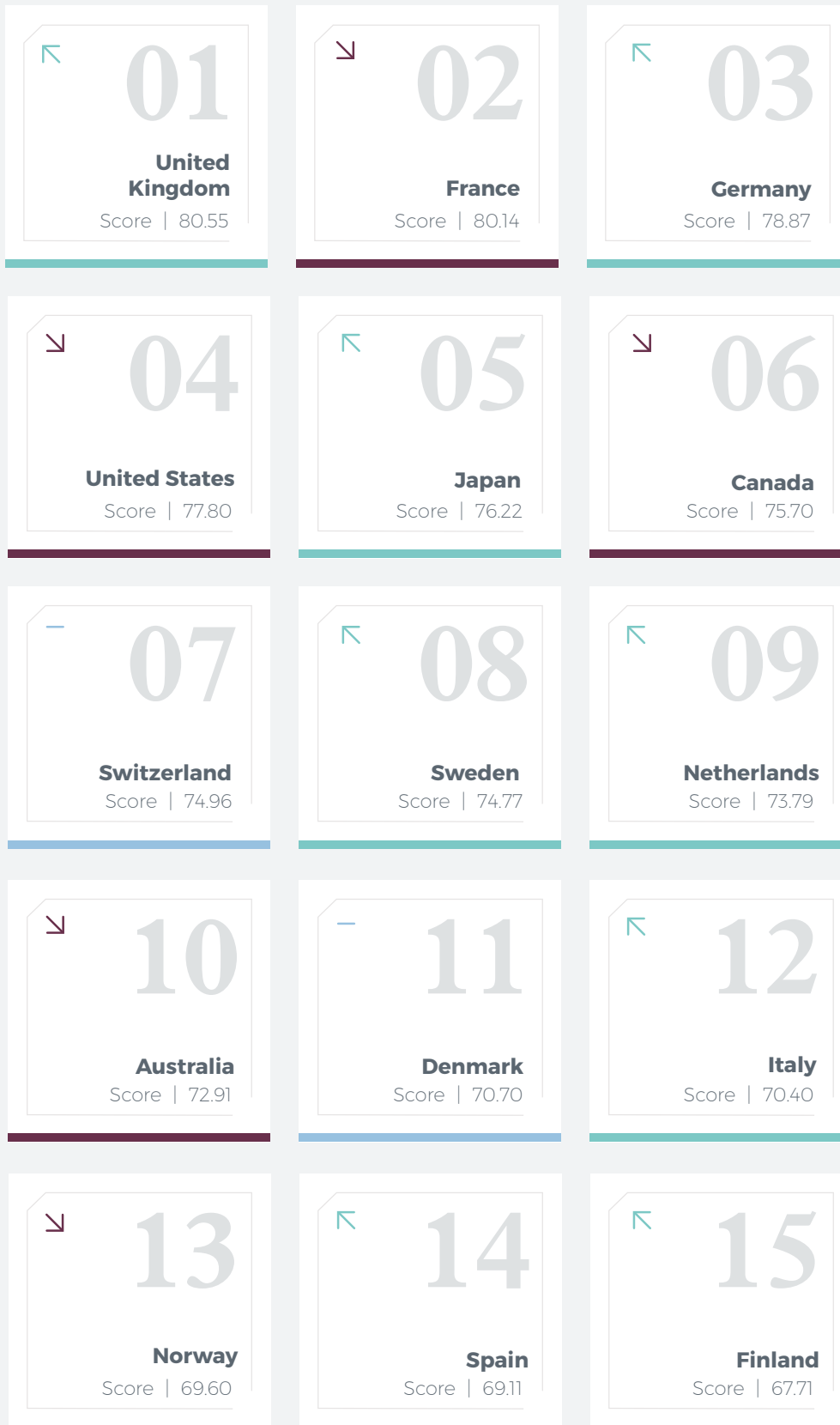
3.3 Breaking down the results

Following the normalisation of the data and calculation of each country's score, the 2018 Soft Power 30 index produced an interesting set of results, not least a new entry into the top five.

The change in the top five countries is an unprecedented result for The Soft Power 30 index. It is arguably representative of the unfolding shift in the global power dynamic, as Asia's rise takes on wider political implications. This is a trend that we have seen play out over the past few years of our Soft Power 30 rankings. This year, Japan makes an impressive entrance into the top five, as Canada falls to sixth place. Despite being a consistent favourite in the polls, Canada saw Japan narrow the gap significantly in this year's polling as the countries earned nearly identical scores.

Japan entering the top five sits alongside further change at the top of the table with a return to form for the UK, and the further decline of American soft power.

2018 RESULTS





UPWARD MOVER



DOWNWARD MOVER



NO MOVER



NEW ENTRY



RE-ENTRY

16

Belgium

Score | 67.25

17

Austria

Score | 67.23

18

New Zealand

Score | 66.68

19

Ireland

Score | 62.78

20

South Korea

Score | 62.75

21

Singapore

Score | 62.44

22

Portugal

Score | 57.98

23

Greece

Score | 54.63

24

Poland

Score | 54.14

25

Hungary

Score | 53.49

26

Czech Republic

Score | 52.64

27

China

Score | 51.85

28

Russian Federation

Score | 51.10

29

Brazil

Score | 50.69

30

Argentina

Score | 48.89

3.1

The top five**UK**

The UK edges out France – only just – to take the top spot in this year’s Soft Power 30 index. The UK’s return to first place will no doubt come as a surprise to many analysts, commentators, and diplomats. The past year has seen Brexit negotiations dominate headlines and consume virtually all of the government’s bandwidth with little tangible progress made. As a result, there are huge question marks over the UK’s future relationship with the EU, its long-term global influence, and its role in the world. However, as of July 2018, the UK remains a member of the European Union, and thus nothing has changed in the objective data with respect to the UK’s position in Europe.

For the UK, this year’s results are an encouraging sign that the nation still commands significant soft power clout. The UK’s soft power strengths continue to sit across the Engagement, Culture, Education, and Digital sub-indices. British soft power benefits from a wealth of publicly funded resources. The British Council in particular has been instrumental in spreading British influence and cultivating soft power, through cultural and educational engagement. As the world’s most trusted news provider, the BBC World Service has amassed a substantial global following, and remains a valuable soft power asset for the UK.

Independent from the government, British art, film, music, fashion, and sport continue to flourish in highly competitive global markets. British music has captured an outsized share of the world’s music fans, following the global success of artists

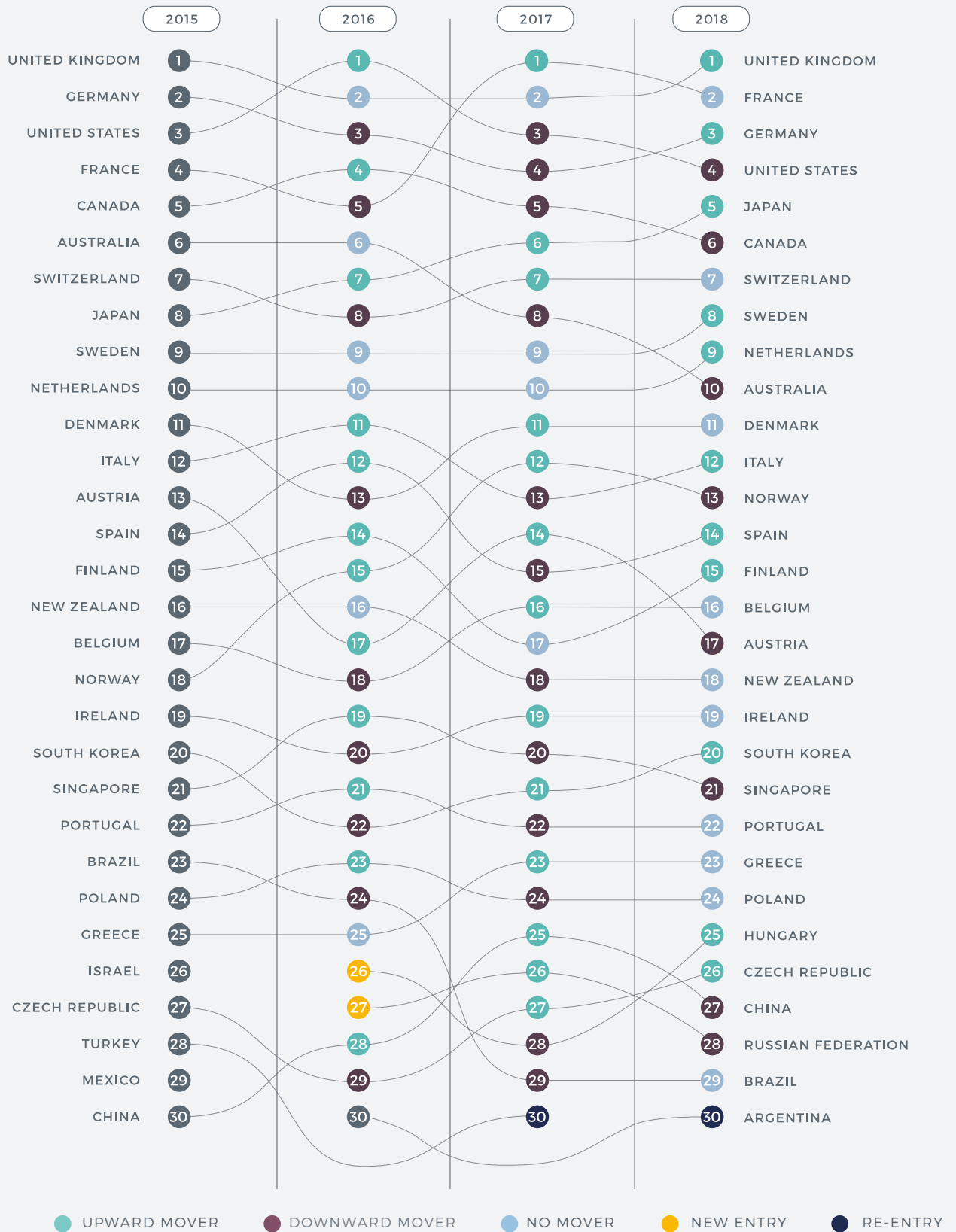
like Adele and Ed Sheeran. The English Premier League also remains a vital cultural asset, projecting British soft power and attracting fans around the world. Tourism in the UK, especially London, continues to thrive with its abundance of museums, galleries, and theatres.

Perhaps the biggest surprise in the UK’s 2018 performance comes from the international polling data. Last year, the UK took a significant hit in the court of global public opinion, particularly among European respondents who scored the UK lower across the board. This year, it appears that opinions in Europe have stabilised. And as a result, the UK improved its position in the polling rankings by two places. There are, however, some causes for concern in the data. The UK received lower average polling scores this year from respondents in North America, Latin America, the Middle East, and Asia. Still, on balance, the UK performed better on the 2018 polling, compared to last year.

Although the UK continues to score highly in the Education and Digital sub-indices, it is important to note that its scores in these sub-indices have declined this year. This should set alarm bells ringing as these two areas are critical elements of British soft power. If the UK is to maintain its global influence, it will need its top-ranking universities, and tools of digital diplomacy firing on all cylinders.

Importantly, the UK had a major soft power event in 2018 to break the monotony of the Brexit narrative:

YEAR ON YEAR COMPARISON





the Royal Wedding of Prince Harry to Meghan Markle. Nearly two billion people around the world tuned in to watch the wedding, a testament to the royal family's enduring appeal and international reach. The wedding holds great significance for Britain's global brand, projecting not just the usual image of tradition and royal pomp, but a powerful story of diversity and integration. It may sound twee, but the wedding has likely had a significant positive impact on the UK's soft power and its overarching narrative as an evolving modern country. We do not know the extent of the wedding's impact, but as shown in the polling data, global perceptions of the UK improved this year.

A perhaps unexpected improvement in the UK's performance comes in the Enterprise sub-index. Despite Brexit, the UK remains a leading tech and innovation hub, attracting a significant amount of investment, and dominating in emerging

technologies, particularly fintech and AI. This is an impressive feat, but cannot be taken for granted. The UK has yet to leave the EU, and is likely to feel the pressure of competing cities such as Paris, Berlin, and Stockholm once (if) it leaves the single market.

Where the UK goes from here is anyone's guess. It is not clear if HM Government has a compelling vision for what Britain will look like in five years' time. Much remains to be done if the calls for "Global Britain" are to amount to anything more than a slogan. Intent must be matched with sufficient funding and resources, lest it become an empty branding exercise. The UK can only rely on the success of the GREAT campaign for so long. As we approach March 2019, all of the as-yet-to-be-answered questions on the UK's future relationship with Europe and its role in the world will have to be addressed.

FRANCE

After an impressive leap from fifth to first place in 2017, France slips a notch to second in the 2018 Soft Power 30 index. This, however, should not be viewed as a significant decline in soft power, not least because the margin between the UK and France in this year's scores is razor thin. France continues to find its greatest soft power strength in global engagement, due to its vast diplomatic network. It is unrivalled in its membership to multilateral and international organisations, and has the highest number of cultural missions abroad. France also performs well in the Culture sub-index, posting strong performances across art, film, food, sport, and tourism metrics. With the highest number of Michelin-starred restaurants in the world, and a plethora of museums, galleries, and UNESCO World Heritage sites, it is no surprise that France also boasts the highest number of international tourist arrivals in the world. As such, France's deep cultural wealth remains an invaluable soft power asset.

Last year, France's soft power saw a considerable boost on the heels of the election of the energetic, reforming, and globally-minded President Emmanuel Macron. President Macron's digital savvy continues to benefit French soft power, as measured in the Digital sub-index, as it climbs further up to second place, overtaking the UK and Germany. However, as predicted in last year's Soft Power 30 index, Macron faces similar challenges to Canadian Prime Minister Justin Trudeau in maintaining his popular momentum. This year, France experienced a fall in its international polling rank, receiving lower scores from every region in its approach

to global affairs. While this is likely to be a disappointing result for the French president, it is not entirely unexpected. Macron's close personal relations – at least on the surface – with US President Trump come with risks. Macron's aggressively friendly overtures to Trump have proved ineffective in influencing White House policy. At the same time, the images of the Trump-Macron "bromance" do not play terribly well with audiences in Europe.

Although France faces big challenges ahead, its improved performance in the Government sub-index, as well as accomplishments such as a reduced deficit, improved economic growth, and increased foreign investment one year into in Macron's presidency, are encouraging signs that the reform-minded president is starting to re-invigorate the economy. France suffered a dip in the Enterprise sub-index, but big change takes time.

What four years of data on France show is that Macron is a net benefit to French soft power. France's lowest ranking in The Soft Power 30 series was fifth place in 2016, the tail end of François Hollande's Presidency. But since Macron took up residence in the Élysée Palace, France has placed first and second in The Soft Power 30 rankings.

While Macron was certainly right to try and persuade Trump away from his worst instincts on climate change, trade, and the Iran deal, it is clearly time to pivot towards other G7 states, shore up a coalition of the willing, position Paris (and Berlin) as the guardian(s) of a rules-based order, and drive forward a positive global agenda. That is all much easier said than done, but the liberal international order needs a new champion. If Macron can maintain

his political momentum and keep France focused on driving the global agenda on key issues, there is every chance that France returns to the top spot in 2019.

GERMANY

Germany moves up one place from fourth to third in this year's Soft Power 30 index, fuelled by improved performances in the Enterprise and Education sub-indices, and well-balanced returns across the board. It remains widely respected for the high quality of its advanced manufacturing sector and engineering prowess, which is prominently showcased at the annual Hanover Messe, as well as on roads, racing circuits, and railways around the world. Germany's ability to maintain a strong manufacturing base through technical skill and a practically-minded education system has seen it deliver admirably low levels of income inequality, low unemployment, and an all-round economic model envied by much of the world.

Since reunification, Germany has been the primary driving force in European affairs, playing a decisive role in safeguarding the stability of the European Union. Based on previous years' of polling data, it is viewed as a steady hand in both European and international affairs. However, the 2018 polling results report a fall in favourability towards Germany's foreign policy. It is still very high compared to other countries, but Germany has performed better in the past. Perhaps this is a result of the rocky coalition agreement process and the fact that a previously unassailable Chancellor Angela Merkel now looks politically weaker at home. Moreover, Germany has seemed less present on the global stage

over the last twelve months. This could be the result of turbulent domestic politics or the passing of the baton to a new Foreign Minister, Heiko Maas, from a long-serving and internationally well-known statesman, Frank-Walter Steinmeier. Either way, if Germany is to continue to march up the rankings, it will need to rediscover its global purpose and voice quickly.

Chancellor Merkel faces a critical moment for both Germany and Europe. The domestic political landscape of Germany is certainly not what it was even twelve months ago. The rise of the far-right AfD poses challenges, as does infighting between Merkel's own CDU and its Bavarian sister-party the CSU. At the same time, parts of Europe are gripped by populist convulsions that threaten the core values of the European project. Beyond Europe's borders, the whole of the international liberal order



is on shaky ground. While there are plenty of foreign affairs commentators who wish to declare Merkel the "Leader of the Free World", she herself has never seemed comfortable with the label or the responsibility it entails.¹

But as the threats to the global order mount, the world will need a more active and assertive Germany to show moral leadership and foster multilateralism. Merkel has already made clear that Germany – and Europe – needs to forge their own way and can no longer rely on American partnership to determine the direction of their foreign policy.² As Europe develops a more independent voice, Macron's France and Merkel's Germany will need to work collaboratively and put their soft power resources to use effectively if they are to defend Europe's interests and uphold the values of the liberal international order.

US

As the 2018 results show, America's relative soft power decline continues, with the US falling from third to fourth in this year's rankings. Last year, we saw a sharp decline in the US' performance in the international polling, with its score falling nearly ten per cent from 2016 to 2017, likely driven by the harsh rhetoric of "America First". America's fall in the rankings from 2016 to 2017 was driven almost exclusively by polling. This year, however, objective metrics are now registering the erosion of American soft power. This was most clearly evidenced in the Government sub-index, where the US fell from twelfth to sixteenth. The US performed worse in the Freedom House Index, and saw an increase in the number of executions carried out by the state.

Staying with the elements of soft power under government's control, the Trump administration has actively undermined its own diplomatic capability with plans



for deep cuts to the State Department. While the US held onto its fourth place rank in the Engagement sub-index, its score in that category fell significantly. If these planned cuts to the US diplomatic network and overseas development aid go ahead, it will further erode US soft power.

Luckily for the US, no single president can wipe out the vast soft power resources that the US has amassed over decades. The country tops the Education, Culture, and Digital sub-indices, and its soft power is strongest in its higher education institutions, cultural production, and technological innovation. With the highest number of top universities in the world, helped by the prestigious global branding of the Ivy League, the US is unrivalled in its ability to attract international students from around the world, more than doubling the number of international students in the UK – which boasts the next highest international student total. In terms of culture, the US continues to set the pace in film, television, and online entertainment, and it is unlikely that the dominance and reach of American culture will decline anytime soon.

The US is also home to some of the largest tech companies in the world, including Amazon, Apple, Facebook, Google, and Microsoft, as well as numerous start-ups in Silicon Valley and tech hubs across the country. The US also saw an improved performance in the Enterprise sub-index, a testament to its innovative culture. With the emergence of newer players such as Netflix, who have leveraged the intersection between media and tech, we are likely to see US culture, innovation, and technology continue to thrive for years to come.

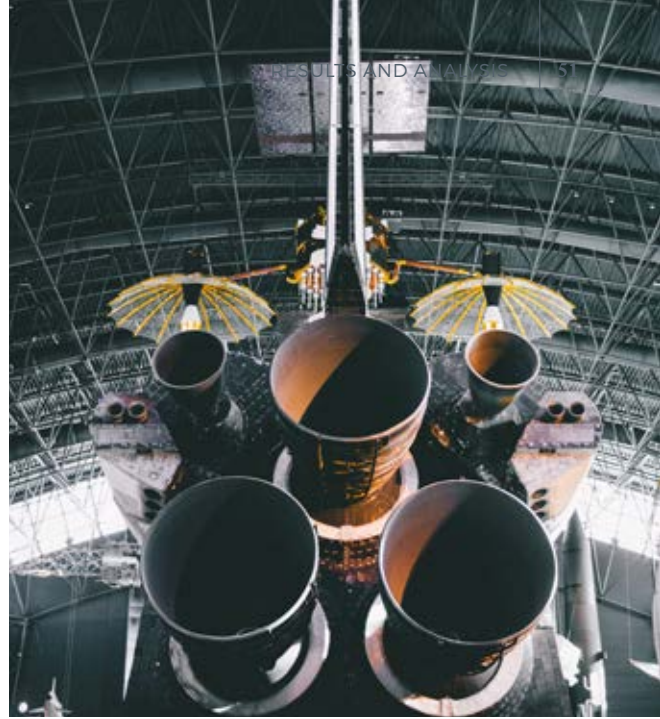
The key takeaway when looking at the data on America's soft power is that it is strongest in those areas that exist outside the control of government. In these areas, Culture, Education, and Digital, the US is world-beating. However, President Trump's zero-sum approach to relations with long-standing allies, regular undermining of the liberal international order, and stubborn refusal to contribute to major global challenges like climate change, all bode ill for the future of American soft power and US credibility more broadly.

JAPAN

Japan's steady rise from eighth place in our inaugural 2015 rankings to fifth this year is remarkable for a number of reasons. First, Japan is the only country to have moved up the rankings each consecutive year from 2015 to 2018. Second, Japan is the only Asian country to break into the top five – as well as the top ten. Third, it has achieved this despite having to overcome a significant – and well-documented – language barrier with the rest of the world.

Japan is the only country to have moved up the rankings each consecutive year from 2015 to 2018. It is also the only Asian country to break into the top five – as well as the top ten.

This year, Japan was lifted by an impressive rise in its polling scores, which helped push it into the top five. Japan's soft power credentials should not come as a surprise. Japanese culture and innovation have long been seen, heard, tasted, experienced, played, and felt around the world in its anime, manga, J-pop, cuisine,



electronics, automobiles, art, literature, design, architecture, and more. Iconic characters such as Pokémon and Hello Kitty, as well as household names such as Toyota and Sony, continue to serve as daily reminders of Japan's pervasive influence worldwide. This is very much reflected in the polling results, where Japan performs consistently well across all categories. While Japan enjoys global recognition for years of accumulated soft power efforts, a poorer performance in both the Culture and Enterprise sub-indices is a reminder that it must continue to work at developing its soft power assets.

Upcoming major events such as the G20 meeting, Rugby World Cup in 2019, and the 2020 Tokyo Olympics, will be key opportunities for Japan to further engage with global audiences and hopefully welcome many more first-time visitors. With over 28 million tourist arrivals in 2017, Japan is already one of the most popular tourist destinations in the world. As sports diplomacy has shown itself to be hugely important for North and South Korea this year, Japan should be planning on how to best leverage its hosting of upcoming events to showcase its best features to the world.

An oft-overlooked soft power strength is Japan's extensive diplomatic network. Japan has the fifth largest diplomatic network in the world, which is further supported by numerous cultural promotion centres. Also underappreciated is Japan's role as a major overseas aid donor, and its position as the second largest contributor to the United Nation's budget. A significant improvement in trust towards Japan's approach to global affairs according to the polling results

is an encouraging sign that Japan can, and should, play a bigger role in driving the global agenda. That said, Japan's rise in The Soft Power 30 index comes at a time when relations with its closest ally, the US, are strained. Disagreements over trade sanctions have no doubt been a major cause of diplomatic and economic concern for Japan. However, the US withdrawal from the Trans-Pacific Partnership has also presented Japan with an opportunity to take leadership. Through the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), and the Regional Comprehensive Economic Partnership (RCEP), Japan can help realise a free and open Asia Pacific region, acting as a champion of free trade and a proponent of multilateral cooperation.

Amidst thawing Sino-Japanese ties, Japan has a unique opportunity to take a more active role in shaping the regional order. As our polling shows, historical grievances with Japan in China and Korea continue to weigh on Japanese soft power. Japan has always had the curious soft power trait that attraction to it is stronger the further away one travels. If Japan can capitalise on improving relations with China (Chinese survey respondents were more positive to Japan this year) and chip away at the negative historical feelings on the Korean peninsula, it could continue its climb up the table. Japan must ensure that it leverages its diplomatic network to highlight its longstanding contributions to international development as one of the top donors of foreign aid, and convey its continued commitment to global peace, stability, and multilateral cooperation.

CANADA

While it is no longer in the top five, it is worth looking at what led to Canada's fall from the very top-table of soft power. While Canada's 2017 slip was attributed to a reversal of the "Trudeau effect", this year's fall out of the top five could mark the start of a worrying trend. Canada returned poorer performances in the Culture, Digital, Education, and Enterprise sub-indices, which all contributed to the fall in its overall ranking in The Soft Power 30.

The good news, however, is that Canada still performs well in the Government sub-index, and continues to be one of the most admired countries in the world according to the polling. In particular, it is viewed as a top destination to visit for tourism, work, and study, and is also the most trusted country in its approach to global affairs. This is a positive indication that Canada is seen as a force for good in the world and it should be encouraged to act all the more forcefully and confidently in pursuing its priorities and promoting Canada's values. Given relations with the US are at a historical low, Canada should

work to carve out a more distinct role for itself. Canada has traditionally been seen as America's close partner and neighbour, but that now seems to carry more risks than rewards. Canada would do well to make a clear separation from the US, and work more closely with like-minded partners across the Atlantic and the Pacific.

Prime Minister Justin Trudeau will no doubt play an important role in driving further engagement, and should continue to leverage his strong international online following. At the same time, fluctuations in his popularity suggest that other key figures in diplomacy should ensure that initiatives in foreign policy, international trade, and humanitarian aid are matched with digital diplomacy efforts. Global Affairs Minister Chrystia Freeland's recent visit to Bangladesh, and Canada's ongoing efforts to address the Rohingya refugee crisis, for example, are key opportunities for Canada to take global leadership, and will be important for advancing its soft power push.



REMAINING TOP TEN

Rounding out the remaining top ten places are Switzerland, Sweden, the Netherlands, and Australia. The top ten remains the same as previous years, but with a notable fall in Australia's ranking from eighth to tenth. Switzerland, Sweden, and the Netherlands, all top performers in the Government sub-index, hold strong at seventh, eighth, and ninth respectively.

Switzerland maintains its hold on seventh place, with strong performances in the Government and Enterprise sub-indices. It posts some of the highest scores in metrics on human development, human rights, and government effectiveness, while its revered quality of life is reflected in strong international polling scores for liveability. Switzerland came top in the polling last year, but averaged across all categories, it falls to fourth this year, behind Italy, Canada, and Japan. Switzerland's polling performance faltered on comparatively weaker perceptions of its culture. However, Swiss neutrality remains a potent soft power asset, as it continues to be among the most trusted countries in the world, as reported in the polling data. Switzerland's approach to global affairs and its impeachable neutrality make it one of the world's most effective arbiters and peace mediators.

For Australia, which ranked sixth in 2015 and 2016, this multi-year fall should concentrate minds in Canberra, as Australia faces the real possibility of falling out of the top ten, should the trend continue. Australia's fall in the index is largely the result of poorer performances on both the objective and subjective sides of the index. Australia

ranked lower this year on the Culture, Enterprise, and Education sub-indices. In the international polling, Australia fell in its score and rank. Australia's global influence is hampered by the tyranny of distance, making it all the more important to attract international attention for the right reasons. Clearly Australia's soft power efforts need to be redoubled if it is to hold its spot in the top ten.

Sweden's rise to eighth is helped by an impressive leap from seventh to third place in the Enterprise sub-index. It outperforms major economies such as the US, Germany, and the UK, as well as the Asian innovation hubs of South Korea and Japan. It may seem counter-intuitive for a state more associated with cushy social safety nets than the rough-and-tumble of capitalism to breed entrepreneurship, but Stockholm produces the second-highest number of billion-dollar tech companies per capita after Silicon Valley, as evidenced by unicorn companies such as Spotify.

The Netherlands benefits from improved performances in most sub-indices, notably Education and Enterprise. Despite its relatively small size, the Netherlands has the fourth most top-ranking universities after the US, UK, and Germany, with thirteen universities in the Times Higher Education Global University Rankings. As a result, it comes fourth overall in the Education sub-index, outperforming Australia and Canada.

Stylak Club
AZURE
2F

PIZZA
&
INE

味わい屋

ORIGINAL MENU

三番街

ててけ

三番街

大雅

三番街

三番

とらじ

中野店

魚料理
らんまん

焼肉
とらし

焼肉

サービスランチ

理

TORAZ

三番街



2.3

Breaking down the objective data



GOVERNMENT

The Government sub-index uses a range of metrics that capture political values like freedom, human rights, democracy, and equality. It also includes measures of government effectiveness and broad metrics on citizen outcomes like Human Development Index scores. Nordic and Northern European countries regularly top global rankings for government effectiveness, prosperity, and human development. This year, Sweden takes the top spot in the Government sub-index, followed closely by Switzerland and Norway.



DIGITAL

The Digital sub-index comprises a combination of metrics that capture a country's digital connectivity, the effectiveness of government online services, and the use of digital diplomacy. The US, home to numerous tech giants, comes top again. The US also puts in a strong performance in the digital diplomacy metrics. The past year has seen an unprecedented, and sometimes controversial, use of social media by politicians and government, reminding us of the immense impact digital tools can have on global affairs. France follows closely behind, boosted by a top performance in government online services, leaving the UK in third and Germany in fourth. South Korea, known for its state-of-the-art digital infrastructure, places fifth in the rankings for this sub-index.



EDUCATION

The Education sub-index focuses primarily on higher education, by measuring the quality of a country's universities, their ability to attract international students, and contributions to academic research publishing. The US boasts the highest number of top universities, attracts the most international students in the world, and contributes significantly to academic research. As a result, the US continues to prevail in this sub-index. For the first time, however, the UK falls behind Germany. The impact of Brexit on international student applications is not yet fully evident, but the education sector in the UK will need to work overtime to counter any perceptions that international students are no longer welcome.





ENTERPRISE

The Enterprise sub-index aims to capture the attractiveness of a country's business model, its capacity for innovation, and regulatory framework. Singapore tops the sub-index for the third year in a row, maintaining its lead on close competitor, Switzerland, which ranks second. This is an impressive feat for the city-state, and often attributed to its economic competitiveness and favourable business environment. With one of the lowest rates of corruption, and a highly skilled workforce, it is no surprise that both global giants and start-ups choose to set up their Asian headquarters, as well as R&D facilities in Singapore. That being said, Singapore also performs well in metrics for innovation, and posts the highest proportion of high-tech exports.



ENGAGEMENT

France continues to dominate the Engagement sub-index, which measures the reach of countries' diplomatic networks and their commitment to major global challenges like development and the environment. In terms of influential reach, France has one of the largest embassy networks in the world, rivalling the US and China in its number of diplomatic missions. France is also a member of more multilateral organisations than any other country. France has topped the Engagement sub-index in every year of The Soft Power 30 study. It is hard to imagine France losing the top spot in Engagement next year.



CULTURE

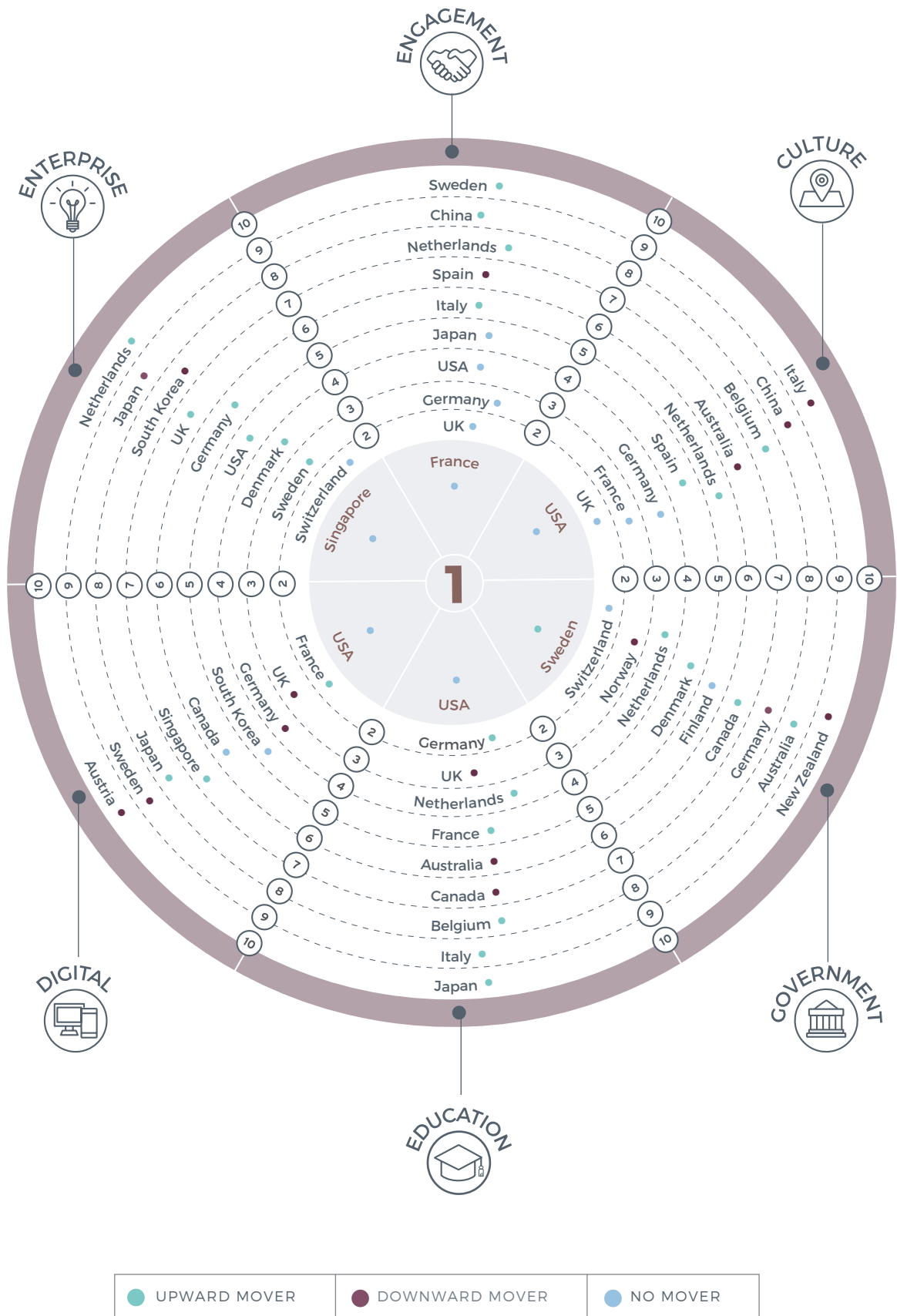
Culture is the most potent of America's soft power resources, and it is no surprise that the US outperforms other countries across metrics measuring art, film, music, sport, and tourism. American cultural and creative outputs continue to have unrivalled global reach, boosted by Hollywood's sustained popularity, and the rise of media groups such as Netflix. The UK follows closely behind, helped by the global success of the British music industry. British recording artists produce the greatest number of top 10 selling albums in foreign countries, according to IFPI statistics.³ The UK is also home to three of the top ten most visited art museums in the world. France, which comes third in the Culture sub-index, boasts the highest numbers of international tourist arrivals, the most Michelin-starred restaurants, and the most visited art museum in the world: the Louvre.



3.3

Breaking down the results

Comparing the top ten countries across the six sub-indices, the graphic opposite offers a greater level of detail into where the top performers in the index derive their soft power resources.



4.0

The Indo-Pacific in focus: The Asia Soft Power 10

- 4.1 India rising: soft power and the world's largest democracy

- 4.2 The ASEAN we don't know

- 4.3 China goes global: why China's global cultural strategy needs flexibility

- 4.4 Japan: Asia's soft power super power?

- 4.5 Australia in Asia: the odd man out?

- 4.6 The two Koreas and soft power

- 4.7 The Asia Soft Power 10

The rise of Asia is a well-established talking point in foreign policy and economic circles alike. As we set out in the introduction of this report, and as others have argued,¹ Asia's role in determining the future of the liberal international order will be critical, as its economic rise is translated into a correspondingly larger role in international affairs.

Recognising this important shift in global geopolitics, the following chapter introduces the latest addition to our Soft Power 30 research project: an all-Asia ranking of soft power. In total, our dataset includes 60 countries, though we only focus on the top 30 in publishing our final list of rankings. This year, we have pulled the top ten performing Asian countries from the full Soft Power 30 dataset and arranged them into a new Asia-focused league table: The Asia Soft Power 10. Obviously, this does not include every Asian country, as our set of 60 is selected based on a combination of size, history of international engagement, and data availability. We have taken a focused view of Asia, including states in South Asia, Southeast Asia, and East Asia. While some might be inclined to include them, we have left the Middle East, Central Asia, Australasia, and Russia out of this exercise. The aim of The Asia Soft Power 10 is to give greater insight into the current balance of soft power in Asia and provide some analysis as to which states are performing well, which could do better, and why.

To set the context for The Asia Soft Power 10, this chapter features six essays, each written by a different internationally recognised analyst, commentator, or practitioner. These essays provide a diverse account of the latest developments in Asian geopolitics and emerging approaches to soft power in the region, each from a different country-specific perspective. The topics covered in the essays that follow take us from the Indian sub-continent to the future of Australia's role in Asia – with stops inbetween touching on ASEAN, China, the Korean détente, and Japan.

¹ Lowy Institute (2018) Asia Power Index, Sydney: Lowy Institute. https://power.lowyinstitute.org/downloads/LowyInstitute_AsiaPowerIndex_2018-Summary_Report.pdf

4.1

India rising: soft power and the world's largest democracy

Dhruva Jaishankar

BROOKINGS INDIA

Arguably, few phrases are as misused in international relations as "soft power." When he coined the term, Joseph Nye captured the important and (at the time) poorly-studied phenomenon in international affairs of "getting others to want the outcomes that you want," predicated on the attractiveness of one's culture, political values, and foreign policy. As the world's largest democracy that is also home to the world's largest number of impoverished people, India is variously described as a model soft power or a country that makes remarkably poor use of it. For some, its rich culture and democracy stand in contrast to other authoritarian and revisionist great powers, and indeed many Indian leaders speak positively about the country's soft power potential. By contrast, as implied by its absence from The Soft Power 30 Index, India evidently does not yet benefit as much from international awareness, positive associations, or investments in cultural diplomacy as many other countries.

In reality, the picture is mixed. Indeed, there are many ways in which India fares poorly in terms of elements of national attraction. It has a widespread (and often justified) reputation for corruption, endemic poverty, and hostility to business. Reports in the international media of pollution in urban areas, child labour, and violence against women have also detracted expatriates, tourists, businesspeople, and other visitors. At the same time, India's associations have started to change over the past quarter century from a land of poverty and Mother Teresa to a source of software programmers and techies.

However, despite these contrasting trends, there are several reasons that may explain why India fares worse on objective metrics of soft power than it perhaps should. Firstly, any measure of soft power that compares countries on a per capita basis is bound to favour developed states over developing ones such as India. India may be home to more top 30 unicorns (billion dollar start-ups) than any country other than the United States and China, but its digital penetration remains low, with millions still without access to electricity, let alone basic digital technologies. Similarly, India has more UNESCO World Heritage sites than all but five other countries and more public policy think tanks than any country

outside the United States, China, and United Kingdom, but still fares poorly on tourism and education on a per capita basis.

Secondly, India rates badly on any measure of state-driven cultural diffusion rather than more organic and natural private sector and citizen-led efforts. For example, India's national airline – Air India – is in such woeful shape that the government struggles to find buyers or investors. But four of the fastest growing airlines in the world by aircraft orders (Indigo, SpiceJet, GoAir, and Jet Airways) are Indian, all privately owned and operated. Indeed, most Indian cultural diffusion to overseas audiences – from yoga to Bollywood – has occurred without the involvement of the Indian government, which has made only belated attempts at reclaiming these phenomena as national contributions. In a similar vein, the Indian government has made no more than modest efforts at promoting the study of Hindi abroad in large part because

of its linguistic diversity at home. Recent efforts at doing so have been controversial and hotly debated within India.

Thirdly, there are Indian contributions that are not necessarily associated with the country. The most successful export of India's largest car manufacturer Tata Motors is Jaguar Land Rover, manufactured primarily in Britain. To give a very different example, Buddhism has hundreds of millions of adherents around the world but very few in its birthplace in India. While Buddhism has become indigenised in such places as Japan, Thailand, Sri Lanka, and Mongolia, India has only recently made efforts at appealing to these countries as the fount of Buddhism, by facilitating pilgrimages and sponsoring religious renovations, in China and Myanmar.

Finally, in many cases India's appeal is to others in the developing world rather than to high-value or prestige markets. For example, despite their many evident shortcomings, India's universities continue to attract a large number of students from across the developing world, including Nepal,



Afghanistan, and Africa. Indian food is popular around the world but is often seen as a cheap eat rather than worthy of a Michelin-starred fine dining experience. Indian popular films may not be rewarded at the Academy Awards or at Cannes but have massive followings in China, Central Asia, and the Middle East. There are recent signs that Indian culture may be moving up the value chain: consider the establishment of luxury Taj Hotel properties in Boston, San Francisco, and London, or the New Delhi fine dining establishment Indian Accent opening up a branch in New York City in 2016.

Despite the evident shortcomings – both in terms of actual soft power and in ways in which metrics capture India’s soft power capabilities – India has a reasonably good track record of leveraging its culture, political values, and foreign policy for national objectives. In the 1950s, India benefited from significant aid from both the United States and Soviet Union. Democrats in the US Congress saw India as a darling of the developing world even as Soviet leaders perceived the country as a foothold for their engagement outside the Communist bloc. India benefited in very real terms from these associations and relationships, resulting in the establishment of the Indian Institutes of Technology, which formed the backbone of India’s software boom in the 1990s, and the Green Revolution in the 1960s that helped make the country agriculturally self-sufficient.

There was also a strong moral streak in India’s external engagement during the Cold War, helped in part by its self-perception as a pluralistic but post-colonial democracy. In 1959, it was in India that the Dalai Lama sought refuge, and the presence of the Tibetan spiritual leader and his followers in India continues to attract visitors and supporters from around the world.



India is variously described as a model soft power or a country that makes remarkably poor use of it.

Similarly, India's principled boycott of South Africa for its racist Apartheid policies won it respect from post-colonial states across Africa. In 1971, despite overwhelming opposition from the US and United Nations, India created international acceptability for its intervention in East Pakistan (which resulted in the independent state of Bangladesh) by calling attention to the morality of its actions. It was assisted in no small part by the appeal of Indian culture among the likes of former Beatles member George Harrison, who organised a sold out concert for Bangladesh in New York's Madison Square Garden that featured Eric Clapton and Bob Dylan, and helped bring acceptability to India's military intervention and creation of an independent state.

India's soft power appeal manifested itself even after the end of the Cold War. In the 1990s, India was brought into Asian institutions by the Association of Southeast Asian Nations (ASEAN), who saw the appeal of its growing economy and democratic values. Similarly, in the 2000s, the US worked to gain India an international waiver from nuclear sanctions, effectively recognising it as a de facto nuclear weapon state, a process that was enabled by mostly positive associations of India as a democracy, growing market, and responsible steward of nuclear weapons. Even more recently, governments and dissidents in India's neighbouring countries – from Bangladesh and Nepal to the Maldives and Afghanistan – turn to India for assistance in conducting free and fair elections, drafting their constitutions, and developing welfare schemes.

As these examples suggest, the metrics of soft power – particularly those that capture state-led efforts, high-end cultural exports, or per capita capabilities – may understate India's record of utilising its soft power for national objectives. India has found soft power to be a necessary but insufficient ingredient in its engagement with the world. As a democracy with a rich culture and a modicum of principle in its international engagement, it has often benefited in real, tangible ways from its soft power. Clearly though, it has its work cut out in better projecting its culture and values to international audiences. As India builds upon a range of ongoing political and diplomatic efforts – from improving its ease of doing business rankings, unveiling its Incredible India tourism campaign, getting International Yoga Day recognised by the United Nations, or investing in Buddhist diplomacy – we can expect its soft power to gradually grow.

4.2

The ASEAN we don't know

Ong Keng Yong

S. RAJARATNAM SCHOOL OF INTERNATIONAL STUDIES

By design, ASEAN is an inter-governmental organisation, not a supranational entity. When founded in 1967, it had five member states. Today, it comprises Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam. Decision-making in ASEAN is by unanimous consensus and there is no possibility of a majority vote to settle any controversial issues. The cost of running the ASEAN Secretariat based in Jakarta, Indonesia, is equally shared by member states. This means it is not easy to make a quick decision in ASEAN on any issue as the national interests of ten very diverse countries are difficult to converge, especially given their respective history and politics.

The Association of Southeast Asian Nations (ASEAN) has three levers of non-traditional – or soft – power. First, ASEAN can bring major powers and significant global players to meet and talk regularly about their economic, political, and strategic interests vis-a-vis Southeast Asia. Second, ASEAN is probably the most process-driven and inclusive trading part of Asia with lots of opportunity for growing the digital and hi-tech future. Third, there is capable leadership in ASEAN to take it forward as an exceptional conflict-managing and economically-powered regional body.

To be sure, ASEAN has accomplished several diplomatic, economic, and political initiatives over the past 50 years and should be seen as a significant actor in regional affairs. ASEAN has considerable convening power. It is able to persuade Australia, Canada, China, the European Union, India, Japan, South Korea, New Zealand, Russia, and the United States of America to sign on as ASEAN Dialogue Partners. These ten partners have invested heavily in ASEAN to help develop its economic, security, and socio-cultural capacity and capability.

ASEAN has been entrusted with driving the regional economic and security architecture because the major powers accept the role played by ASEAN as legitimate and important. The ASEAN policy of keeping

Southeast Asia open and neutral vis-a-vis their interests is welcomed by the major powers. They participate in ASEAN-led platforms such as the ASEAN Regional Forum (ARF), the ASEAN Defence Ministers Meeting Plus (ADMM Plus), and the East Asia Summit (EAS).

It has become trendy to argue that ASEAN's finely-tuned equidistant and honest broker position may not last. This has a lot to do with China's ambition to have a greater say in what happens in Southeast Asia. Therefore, recent efforts in ASEAN are focused on ASEAN centrality: member states to uphold the interests of ASEAN first and foremost and not let the expediency of specific, bilateral relationships with other parties affect ASEAN's efficacy and effectiveness.

Beyond its convening power, ASEAN is resource-rich and has built itself into a magnet for global trade and investment flows. Certainly, it is not easy to enforce compliance with the goals of an ASEAN Economic Community, as laid down in agreed action plans. There are incessant criticisms about the slow pace of implementation. ASEAN is often accused of functioning as a talking shop. The civil society and media are not enamoured with ASEAN as they feel that issues of good governance, human rights, regional security, and sustainable development have not been fully addressed by ASEAN.

Yet, ASEAN is a driving force for economic prosperity and progress, notably in digital innovation and start-up enterprises in recent years. The population of ASEAN is taking to smart phones, the internet, and disruptive technologies at a pace outstripping that in the developed world. In fact, according to a recent study, Southeast Asia's internet economy can potentially grow to a whopping US\$200 billion by 2025, and the internet user base is predicted to grow to 480 million by 2020 from 260 million in 2016. The region can become one of the world's top five digital economies by 2025.

China seems to be an instrumental factor in the rise of the ASEAN economy. ASEAN trades extensively with an intensively digitalising China. According to China's Ministry of Commerce, ASEAN-China trade was more than US\$500 billion a year and growing by double digits annually. More importantly, ASEAN and China are today the most vocal champions of trade liberalisation and the rules-based trading order. ASEAN and

ASEAN is a driving force for economic prosperity and progress, notably in digital innovation and start-up enterprises in recent years. The region can become one of the world's top five digital economies by 2025.

China (working with India, Japan, South Korea, Australia, and New Zealand) are working towards the implementation of the unprecedented Regional Comprehensive Economic Partnership (RCEP), which could reach half of the world's population, once the agreement is eventually settled.

Globally, all eyes are now on ASEAN. The favourable geography of Southeast Asia in the middle of a flourishing Asia and between the Indian Ocean and the Pacific Ocean has heightened expectations. Presently, many of the ASEAN member states are among the fastest growing economies in the world. ASEAN is now the leading destination for foreign direct investment (FDI) in the developing world, alongside China and India. While the implementation of ASEAN economic integration may not be fast enough, the good news is ASEAN's ability to strengthen the rules-based culture, inclusive growth and peaceful cooperation.

Some ASEAN leaders may have disappointed segments of their populations. Collectively, however, the ASEAN leaders appear consultative and project the common purpose of the organisation. They have shown an overall capability in forward engagement, especially in the face of common challenges. After the 1997-1998 Asian Financial Crisis, ASEAN leaders moved fast and purposefully to re-establish the competitiveness of the ASEAN economy. In 2012, the leaders regrouped speedily after Cambodia's refusal to unify behind a joint ASEAN stand on the South China Sea.

ASEAN's consensus-based decision-making is often maligned but big and small states can cooperate and collaborate only with such an approach. The ASEAN agenda and its centrality has fundamentally transformed Southeast Asia and maintained its peace and stability for five decades. ASEAN member states have demonstrated their ingenuity to stay relevant by hanging together. There is no military might or extraordinary power which ASEAN can deploy. ASEAN survives through the leaders' clever use of its geography, soft power, and promise of shared regional progress.



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4.3

China goes global: why China's global cultural strategy needs flexibility

Zhang Yiwu

PEKING UNIVERSITY

In recent years, China's "Go Global" cultural strategy has caught the attention of the Chinese public. With the fast development of the Chinese economy, the central government has proposed to work towards building "a Community of Common Destiny for all Mankind", in addition to the "One Belt One Road" bid, both of which gained traction amongst international audiences. China's international standing has evidently risen, and the country, an open-minded great power, is moving towards the centre stage of the world. The "Go Global" cultural strategy is playing an important part in promoting the Chinese value framework, demonstrating the attractiveness of Chinese culture, in addition to upholding the country's international image and augmenting its voice on the international stage. Thus far, China's "Go Global" strategy has achieved enormous tangible success, showcasing the results of China's development and its unique cultural appeal. However, despite the progress, it is a shared understanding amongst the Chinese public that China's cultural influence falls behind its economic weight in the global economy. That is a realistic challenge the country is facing.

Even as global interest in China grows, its value system and cultural traditions have yet to be understood by the international community. Likewise, China's creative and cultural outputs have not yet captured the attention and imagination of wider global audiences. These have proved to be major roadblocks in the country's development process to become a global soft power. How can China overcome these challenges and achieve the progress to which it aspires? This is the question on the minds of those in China who want to engage with the world. However, China should not be too preoccupied with short term gains and immediate results, which are ultimately unrealistic. Moving forward, China needs to be grounded in the reality of things, and dedicate both vision and efforts to the long term.

Even as global interest in China grows, its value system and cultural traditions have yet to be understood by the international community. Likewise, China's creative and cultural outputs have not yet captured the attention and imagination of wider global audiences.



China needs to adopt more flexibility in communicating its culture to overseas audiences. First, in terms of content creation, we need to “walk with two legs”: that is, as we prioritise classical and elite cultures, more emphasis should be placed on popular culture. Pop-culture is much more likely to engage international publics than classical culture. There are a number of reasons for this, but the primary one is that because high culture is rooted in such specific linguistic, environmental, and anthropological contexts, it may not be transferable to those outside that context. Thus, high culture has a diminished appeal as viewers from a different cultural environment have less of a tendency to identify with the styles, values, and traditions reflected in the product. In contrast, pop-culture is less bound by cultural specificity and is thus much more accessible to members of the general public around the world. I believe that China should place a greater emphasis on developing pop-culture products and platforms, such as pop music, TV shows, films, and even the popular celebrity culture that emerges around those industries. The US and South Korea are often highlighted as soft power standout nations. In many ways, this is because of their hugely successful pop-culture industries. In the past, some of our peers in China have routinely overlooked the impact of pop-culture, with the mindset that only elite cultures and the high arts – which no doubt have value – should be shared with global audiences. I urge that the role of pop-culture must now be placed as a priority in China's soft power development agenda.

Secondly, as Chinese cultural and creative industries expand into more forms of pop-culture and engage younger Chinese audiences, it makes sense to focus on new export markets, particularly those of developing





and emerging economies. The domestic market in China is the world's largest potential market for cultural industries. The fast-growing digital economy, combined with rapid urbanisation, has led to an increasing domestic demand for cultural production. China's middle class and its millennial generation represent the bulk of China's consumers, and they have huge spending power in the domestic market. China needs to first and foremost capture the interest of these audiences, attract them, and revitalise the local cultural scene. With a stronger, more accessible set of cultural and creative industries, China could then look at better engaging with countries in Asia, Africa, and Latin America, wherein the vitality of these emerging markets provides the most fertile soil for Chinese cultural industries to truly go global.

Exporting China's cultural products is certainly fraught with challenges. For instance, markets like the US, Europe, South Korea, and Japan are mature and well-established. This means there is a relatively high entry point for Chinese cultural exports, essentially high barriers of entry, and a competitive landscape. In countries where the domestic cultural market is mature and saturated, it can be very difficult for any enterprise to gain a foothold, not least for a foreign one. However, many developing countries and emerging economies are more familiar with Chinese products, and thus might be more inclined to engage with and experience Chinese culture. It is likely easier for China to prioritise these markets as a first point of entry for cultural engagement, which could create opportunities for further expansion in the future.

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4.4 Japan: Asia's soft power super power?

Jonathan Soble

ASIA PACIFIC INITIATIVE

Wealth, technology, cultural cachet — Japan is blessed with an abundance of soft power assets. And it is fortunate to have them: with a constitution that forbids it from waging war, Japan cannot rely on military might to advance its interests the way some of its allies and rivals can.

Yet today the demands on Japan's soft power-centred approach to foreign affairs are growing fast.

The international order is shifting under Japan's feet, especially in Asia. The United States, for decades the dominant force in the region, is spurning old alliances and turning its back on multilateralism and international institutions, central elements of the liberal international order it created after the Second World War. In the age of Donald Trump and "America First," Japan, like other US allies, faces the prospect of having to do more on its own, or forge stronger bonds with different partners.

China, meanwhile, continues to expand its influence. New aircraft carriers and military outposts in the South China Sea are only part of China's growing arsenal. Beijing is also investing exuberantly in soft power, through initiatives like its sprawling One Belt, One Road infrastructure program. And on the Korean peninsula, the North's successful development of a nuclear deterrent has pushed a prolonged crisis into a new and unpredictable phase. Weaponry isn't the only thing that has changed: even a nuclear-armed Pyongyang, it is worth noting, has embraced elements of soft power. Kim Jong-un's "smile diplomacy" at the 2018 Winter Olympics in South Korea and subsequent summit meetings with Trump and South Korean President Moon Jae-in have burnished his international image and won his regime an air of legitimacy.

How is Japan responding to these developments? First, Prime Minister Shinzo Abe is seeking more hard power to supplement the soft. His government has passed laws allowing the Self-Defence Forces to fight abroad to protect Japan's allies — albeit in limited circumstances — and

increased military spending, setting aside a decades-old practice of capping the defence budget at one per cent of GDP, less than half the world average.

Abe remains committed to revising Japan's pacifist constitution. His most recent proposal is minimalist: it would add a clause recognising the legitimacy of the Self-Defence Forces but would keep existing provisions renouncing war and "war potential," which previous draft amendments had sought to eliminate. But even that change would be highly contentious. Amending the constitution requires a national referendum, and opinion polls suggest Abe is short of the majority he needs. His administration has been weakened by a series of scandals, and rivals inside his party are looking to displace him in a leadership vote scheduled for September. If he loses, the pro-amendment movement would lose its standard bearer.

Soft power will remain crucial for Japan, and recent events have highlighted both its value and its limits. To navigate the tumult of the Trump era, Abe has used tireless personal diplomacy — summits, golf outings, and dozens of telephone calls — to build a friendly relationship with the US president. The effort has succeeded to a degree: Trump has, for instance, toned down the anti-Japanese rhetoric he frequently deployed during the 2016 presidential campaign. Yet it has not stopped Washington from imposing tariffs on Japanese steel and aluminium exports, or given Japan much influence over Trump's improvisational diplomacy with North Korea. Japanese policy makers feel sidelined in the talks with the North, and worry that Japan's interests — issues like short

and medium-range missiles and Japanese citizens abducted decades ago by agents of Pyongyang — will be given short shrift in subsequent US-North Korea negotiations.

Japan is deeply invested in the liberal international order that Trump seems intent on abandoning. At moments since Trump's election, it has stepped in

to defend that order — for instance, by rallying the remaining members of the Trans-Pacific Partnership trade agreement to stick with the deal after Trump pulled the US out. Yet other American allies, from Europe to Canada, have shown greater willingness to criticise Trump's protectionist trade policies and attacks on international institutions. Japan, with a government committed to preserving the Abe-Trump relationship and constrained by dependence on US military protection, has been quieter. Abe himself has acquired a reputation as a loyal Trump sidekick rather than a crusader for liberalism.

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The good news for Japan is that its soft power capital is growing. The economy is experiencing a sustained period of expansion. Corporate Japan is globalising, with outbound acquisitions at record levels. In the first four months of 2018, Japanese companies spent more money buying foreign assets than Chinese companies did. The popularity of Japanese food and popular culture continues to grow around the world, especially among the young. And more people are discovering the charms of Japan as a destination. Nearly 29 million tourists visited Japan in 2017, triple the number of arrivals only five years earlier. The government expects 40 million annual visitors by 2020, the year Tokyo hosts the summer Olympics.

Japan is not the only soft power force in Asia, however. Economically, China now has significantly more resources at its disposal. No Japanese initiative could match One Belt One Road, which is expected to create power plants, ports, and other expensive infrastructure in dozens of countries at a cost of at least \$1 trillion. Japan is wary of Chinese economic diplomacy, but recently it has signalled a willingness to cooperate with Chinese-led development initiatives — a concession, perhaps, that Japan cannot hope to block them. Abe said last year that Japan would consider joining One Belt One Road projects, and Japanese, South Korean, and Chinese diplomats agreed at a business summit in May to work together on infrastructure initiatives. How far China is willing to open the door to new partners remains to be seen: according to the Centre for Strategic and International Studies, 90 per cent of funding for One Belt One Road projects has so far gone to Chinese companies.



Japan is meanwhile trying to foster alternatives to Chinese-led development. In June, Abe set a goal of providing \$50 billion in government and private sector investment to in the “Indo-Pacific region” over the next three years. The concept of an “Indo-Pacific,” intended to draw India closer to the US and Japan as a counterweight to China, owes much to Japanese efforts. Abe has championed the concept for a decade, since his first stint as Japanese prime minister in 2006-2007. The recent adoption of the term by the US — for instance, in the renaming of the military’s former Pacific Command — could be called a victory for Japanese soft power.

Part of Japan’s planned infrastructure spending could occur in a proposed Asia Africa Growth Corridor, an economic cooperation network encompassing Japan, India, and a number of African countries that was conceived by Abe and Indian Prime Minister Narendra Modi. In India, work on the previously agreed Shinkansen Japanese high-speed rail line between Mumbai and Ahmedabad, financed by a \$15 billion low-interest loan from Japan, formally began in September 2017. Japanese political and business leaders say they hope to compete with China in infrastructure by offering superior construction quality, efficient execution, and financial transparency. As Japan looks to lead other infrastructure initiatives elsewhere, the rail project will be a crucial test.

Japan possesses impressive soft power resources. But with regional challenges in Asia growing and Japan’s American ally and protector looking increasingly unreliable, it must generate ever higher returns on those resources if it hopes to secure its diplomatic and strategic goals.



4.5 **Australia in Asia: the odd man out?**

Richard McGregor

LOWY INSTITUTE

In the 1990s, when debate over Australia's role in Asia was going through one of its periodic convulsions, Gareth Evans, the then Foreign Minister, coined a phrase to describe the country's often hazy place in Asia's future. Instead of being the odd man out in the region, he said, Australia should be the odd man in.

Australia has always been the odd man out in Asia in one sense. As a largely Caucasian nation tied to an empire, it stood in stark contrast to a polyglot region which took pride in the various ways its nations had shrugged off western colonisers.

Less obviously, though, Australia had been the odd man in as well. Australia strongly backed Indonesian independence, pushed to develop Asian countries as its major trading partners from the late 1950s onwards, educated tens of thousands of Asian students in its universities over many decades, and was a pioneer in forging regional institutions.

To this day, Australia is still strung between the two poles of in and out, comfortably so, on some days, and uncomfortably on others. How this tension plays out depends as much on the regional powerhouse of China, as it does on Australia itself.

The US remains, for the moment, the predominant power in Asia, but it is hanging on by the skin of its teeth in the face of China's challenge. Over time, it is reasonable to assume, the Chinese economy will eclipse that of the US. And from economic clout flows political power.

It was one thing being the odd man out when the US was the predominant power in the region, and Australia's most difficult relationships were with countries like Indonesia and Malaysia. It is something else altogether if Australia is caught offside with China.

Beijing has specific demands for countries in the region, and Australia is no exception. It wants countries to keep quiet about disputes in the South China Sea and show less fealty to the US alliance. In Australia's

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case, Beijing also wants Canberra to stop complaining about China's alleged interference in domestic politics, through the large Chinese community.

China has long prepared for the day when it will be the region's dominant power, building a formidable blue water navy, now with two aircraft carriers, and acquiring, developing, and investing in the technologies to put it on a par with the US, Japan, and Europe. All of its capabilities, in turn, are being leveraged to make Beijing the dominant power in the South China Sea, which only a decade ago could be politely labelled an American lake.

Along the way, China has developed sharp diplomatic elbows, putting relentless strategic pressure on country after country to accommodate Beijing's interests. At the moment, China has Australia in its sights.

As someone who lived in China for many years, and who is now paid to think about it at the Lowy Institute, a think tank in Sydney, I am regularly asked to comment on the rise of Australia's great neighbour to the north.

Often, I adopt a mildly reassuring tone, telling people that just about every country is in the same boat as Australia, struggling to grapple with China's rise.

Singapore had its turn in the Chinese tumble-dryer in 2016 and 2017 as a result of disputes related to the South China Sea and Taiwan; Germany is worried about Chinese investments into its corporate crown jewels, like Daimler, which owns Mercedes-Benz; and the US is endlessly engaged in perennial great power competition with Beijing.

But truth be told, with the possible exception of South Korea, Australia is exposed to China like no other country.

That can be a good and bad thing. Economically, Australia's China success story just keeps on keeping on. According to figures released in the early months of 2018, China now takes one third of Australia's exports, compared with fourteen per cent a decade ago. America's share, by contrast, is less than four per cent.

The growth in services exports is even more pronounced. At Sydney University, overseas student fees rose 92 per cent in three years, to A\$752 million in 2017. At the University of New South Wales nearby, revenue jumped 26 per cent between 2015 and 2016 to A\$560 million, according to the Sydney Morning Herald. Most of these funds come from full-fee paying Chinese students.



Economic and trade relations with China have never been better. Political relations, however, are at one of their lowest points since normalisation of ties in the early seventies.

There are two major issues putting the two countries at odds. The first is China's anger at Australia for speaking out on the South China Sea, often in concert with the US and Japan. The second is the political controversy in Australia, which Beijing believes has been stoked by the government, over alleged Chinese interference in Australian politics.

So far, much to the relief of the business community, China has not imposed any economic costs on Australia, other than the reported delay of some wine imports. Beijing has the means to do so – witness its punishment of South Korea over the stationing of a US anti-missile system in 2016. More recently, Beijing has systemically held up US goods at its borders, to remind the Trump administration of the costs of a trade war.

Beijing could do the same to Australia, but it would come at a cost for China as well. Chinese steelmakers would be hurt by having to buy their resources more expensively elsewhere. More importantly it is often forgotten that it is Chinese families and individuals, not the Chinese government, which makes decisions about where to study overseas and take holidays.

To disrupt this trade, Beijing would have to use a sledgehammer, by shutting access to Chinese travelling to Australia for study and tourism. Not only would such measures hurt many Chinese, they would cause an international outcry which would be hugely damaging to Beijing.



More optimistically, the intensity of bilateral relations is evidence not just of how closely the two countries are intertwined, but how much Australia has changed since the days of the odd-man-in-odd-man-out debate.

Sydney and Melbourne, in particular, increasingly resemble thoroughly pan-Asian cities these days, with higher density living and populations from just about every country in the region.

The inflow of students, especially from India and China, is one reason for that. But so too is immigration, which has transformed the demographics of Australian cities. The idea of Australia as a uniformly white country, an impression one could admittedly still get from surveying the top ranks of the country's political, business, and media elite, is fast disappearing in the rear view mirror.

Australia has its share of bigots, like any country, and always will. But compared to other countries, Australia has made the transition to a genuinely multicultural society with little relative trauma.

Along the way, Australia has managed to preserve the parts of its heritage that remain its core strengths – a lively democracy and strong legal, educational, and governmental institutions.

Throw in the country's physical beauty and clean environment (at least relative to most industrialising Asian countries), Australia has ample qualities allowing it to thrive in the Asia Pacific, as long as it can come to a modus vivendi with China.

Such soft power assets, of course, do not always help relations with China. The Chinese Communist Party has never liked the scrutiny that comes with a free press. Nor do Chinese leaders like to be subject of the hurly-burly of democratic debate.

But Australia's soft power assets are part of a set of qualities that produce an outcome that China does appreciate. Australia is a modern, stable country with a well-established rule of law. Investments have the protection of the courts. Contracts are enforced, all of which has made Australia an extremely beneficial partner for China.

The upside to Australia's China dilemma is that it is not alone. Odd man in, or odd man out, every country in the region faces the same China challenge.

4.6 The two Koreas and soft power

Aidan Foster-Carter

LEEDS UNIVERSITY

Korea and soft power? At first glance not an obvious pairing. The somewhat ironically named Demilitarised Zone (DMZ), which sunders the peninsula along the lines where the 1950-53 Korean War (death toll: four million) ended, remains the most heavily fortified frontier on earth.

2017 saw an intrinsically tense stand-off ramped up further. Pyongyang's succession of ever bigger and better ballistic missile tests and its first hydrogen bomb, countered by threats from President Donald Trump of "fire and fury" to "totally destroy" North Korea, raised fears that what for 64 years had been a smouldering cold war might once again turn disastrously hot.

Yet soft power too has long been a factor on the peninsula, now more than ever. This essay sketches that background, before focusing on the current welcome return to diplomacy. This began with the North's decision to join in February's Pyeongchang Winter Olympics. A far cry from Seoul 1988, which a furious Pyongyang tried to sabotage with terrorism and a boycott.

Both South Korea (ROK) and North Korea (DPRK), to use their official acronyms, still claim to be the sole legitimate Korean government. Long before Joseph Nye coined the term "soft power" in 1990, it aptly describes how the two Korean states have competed globally for well over half a century; ever since the 1953 armistice stopped them from trying to settle the matter by force of arms.

Economic dynamism and cultural projection are two of soft power's main components. The former was paramount at first. 35 years of harsh Japanese occupation left Korea desperately poor; the mineral-rich North had most of the industry. A quest for legitimation at home and abroad drove both regimes to industrialise fast: as a route out of poverty for their people, and to be stronger than the other.

Today it is no contest between the wealthy South and the impoverished, malnourished North. ROK per capita income is 22 times the DPRK's. For exports the ratio is an astonishing 175:1.

Yet initially it was Pyongyang that led, winning kudos in the Non-Aligned Movement (NAM) from which it successfully excluded Seoul. Newly independent Africa's more radical states recognised only the DPRK, which rewarded them with aid. Pyongyang's Mansudae Art Studio remains Africa's go-to for statuary and the like, but nowadays they do need paying.

The North's lead was brief. Its Stalinist system, hobbled by militarisation, proved no match for South Korea's export-led growth. By 1988, in the South's first and biggest soft power success, even the DPRK's communist allies, led by the USSR and China, refused its call to boycott the Seoul Olympics though none yet recognised the ROK (that followed soon after). A handful did stay away: Albania, Cuba, Ethiopia, Madagascar, Nicaragua and Seychelles.

Soon after, the Soviet demise and end of aid ("self reliance", bah humbug) left North Korea famine-ridden and isolated while the South's economic clout carried all before it. With the Kim regime's collapse widely predicted, it looked like game set and match to South Korea.

Not so. At home, a tight grip saw the Kim regime survive not only famine but dictatorships' Achilles heel, political transition. Twice: in 1994 when Kim Il-sung died, and in 2011 when his son Kim Jong-il followed. The latter's son Kim Jong-un, though young, appears secure. Abroad, nuclear weapons attracted opprobrium but spared the Kims the fate of Iraq or Libya.

Nothing soft about nukes, nor Orwellian controls. Yet in recent years the Internet has wrought an unexpected makeover. In an age when image is all, the DPRK's sheer weirdness – military parades, mass games, leader cult, and general hyperbole – have rendered it a potent meme.

In 2013 a billboard advertising the world's most read online news (if that is the word) source went up near Times Square. Featuring images of two rather different thirty-somethings, the caption simply said: "The Kims. They're on the same page". The Mail Online knew passers-by would recognise, and respond to, not only Kim Kardashian but equally Kim Jong-un.

The DPRK did not plan this. Most coverage was negative and cartoonish: crazed pudgy bad-hair tyrant plans nuclear annihilation. That the official Korea Central News Agency (KCNA) upbraided "reptile media" for bad-mouthing Dennis Rodman suggests a shaky grasp of PR.



South Korea was not content with global fame merely as a purveyor of Samsung phones and Hyundai cars. Inter-Korean rivalry apart, another spur was a long-standing self-image as a “shrimp among whales”, squashed between its giant neighbours China and Japan.



But maybe there really is no such thing as bad publicity. All this put Kim and his country on the public's radar. When the time came, they would prove skilled at exploiting said reptiles.

Meanwhile South Korea was not content with global fame merely as a purveyor of Samsung phones and Hyundai cars. Inter-Korean rivalry apart, another spur was a long-standing self-image as a "shrimp among whales", squashed between its giant neighbours China and Japan.

This century has thus seen the ROK vigorously export its culture too. Thanks to this Hallyu (Korean Wave), South Korean TV soaps, and K-pop are big in Asia, and known further afield. The rapper Psy's "Gangnam style" was for several years YouTube's most watched video ever.

2018 has brought fresh twists, mostly positive. Having hitherto shunned all overtures from the new left-leaning ROK President Moon Jae-in – a strong advocate of the old "sunshine" policy of engagement practised in 1998-2007, elected in May 2017 after the conservative Park Geun-hye was impeached – in his New Year address Kim Jong-un performed a sudden U-turn.

Congratulating the South on hosting the Winter Olympics as a credit to the Korean nation, Kim virtually invited himself to the Pyeongchang party. He had shown no prior interest, and deadlines had long passed. Still, Moon and the IOC alike rushed to accommodate the North; where necessary bending the rules on qualifications and sanctions to make this happen.

What followed was fascinating, with soft power to the fore. North Korea insisted on arranging cultural exchanges – concerts in Seoul and Pyeongchang, K-pop in Pyongyang – before sport.

Its cultural delegation was led by Hyon Song-wol, a glamorous singer whose amours are the subject of much rumour. The Seoul media, to whom she said not a word, swooned en masse.

In the Pyeongchang opening ceremony athletes from both Koreas marched together (as also at several past Olympics) but competed separately, except a unified women's ice hockey team. Hastily arranged, this was unpopular at first in the South for fear it would damage "our girls" prospects. By the end, though no medals were won, the Northerners were "our girls" too.

Pyongyang also sent cheering squads, a karate team, and two top-level political delegations for the opening and closing ceremonies. The former included Kim Jong-un's sister Kim Yo-jong, clearly a power in her own right, who also made a favourable impression.

What began as soft power around the Olympics led swiftly to political progress, above all in April 27th's North-South summit between Kim and Moon at Panmunjom in the DMZ on the Southern side. This very successful encounter, carefully choreographed for TV, was in effect a joint exercise in soft power by both leaders, aimed at their domestic publics plus a wider global audience. It was a publicity coup for Kim, who came across as both genial and smart.

Yet this was much more than just PR. The Panmunjom Declaration signed by both leaders is a substantial accord, with concrete commitments and deadlines. After a brief hiccup in mid-May when the North cancelled talks, this wider agenda is starting to be fulfilled. On June 14th generals from both sides agreed to reopen military hotlines. Further talks are imminent to discuss family reunions, joint sports teams, and a permanent liaison office at Kaesong north of the DMZ.

Momentum breeds momentum. In March, Moon's top advisers went to Washington to convey Kim's readiness to meet Trump. He accepted with alacrity, leading to the first ever US-DPRK summit in Singapore on June 12th. How the dust from that will settle remains to be seen, but all agree that this was another PR triumph for Kim Jong-un. Simply by doing normal things, like a walkabout in Singapore, Kim further burnished his global image. North Korea's appalling human rights or its alarming cybercrime activities seem all but forgotten of late.

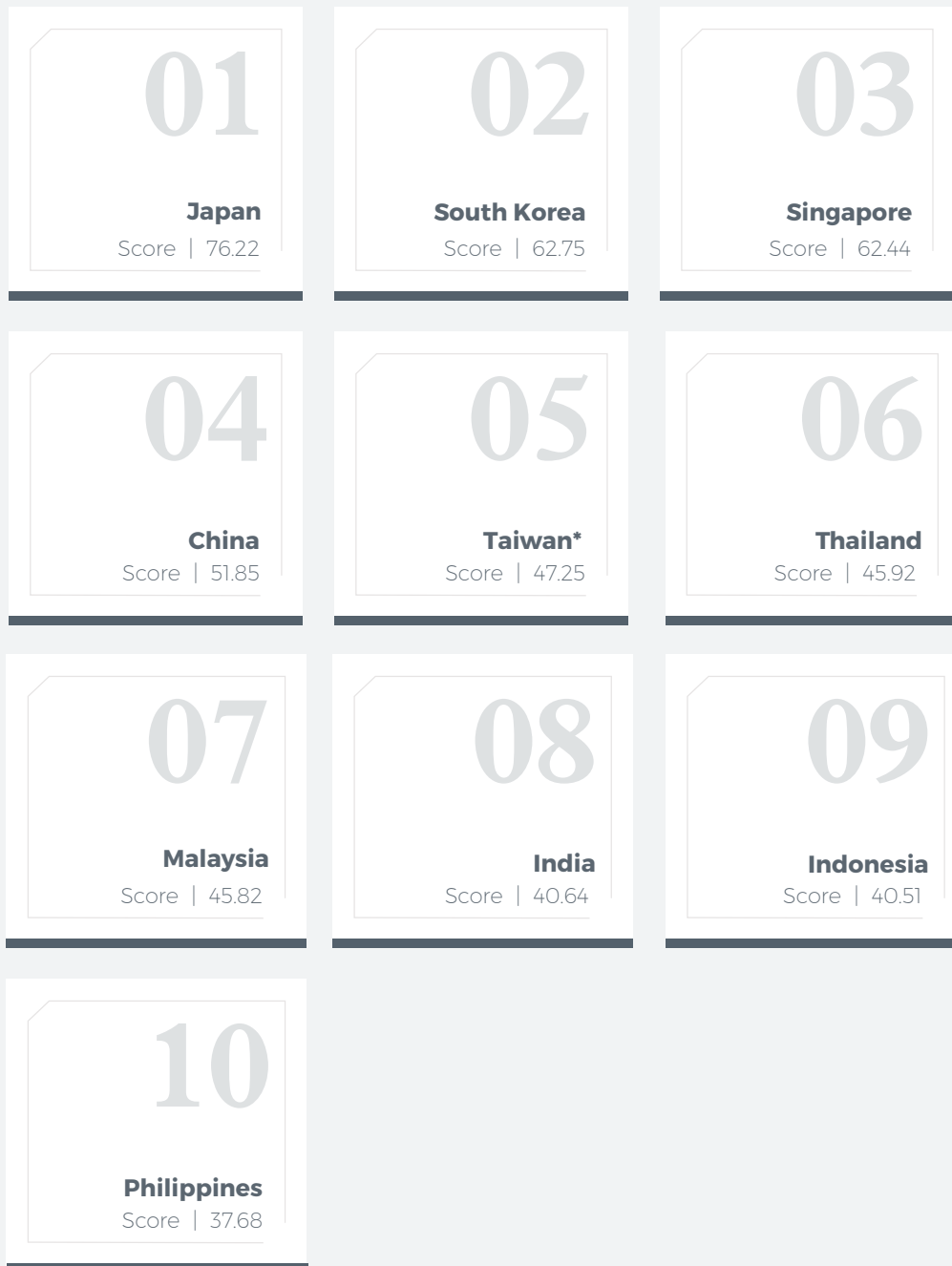
In sum, soft power has long been important – alongside hard – in the dynamics of the Korean peninsula. In the new and unusually fluid swirl of diplomatic outreach that is unfolding as of mid-2018, soft power will continue to play a major role; perhaps in fresh and unexpected ways.





4.7

The Asia Soft Power 10



* Taiwan is an autonomously governed territory claimed by China

Japan's entry into the top five of this year's Soft Power 30 index marks a breakthrough moment not just for Japan, but the Asia region as a whole. In past editions of The Soft Power 30, only four Asian countries have made it to the top 30, namely Japan, Singapore, South Korea, and China. This year is no different, albeit with some movement within the ranks. South Korea rides the K-wave to a strong second place in Asia. It breaks into the top 20 for the first time since 2015, overtaking Singapore with improved performances in the Engagement and Culture sub-indices. South Korea has leveraged the Hallyu phenomenon to great effect. Following K-pop boyband sensation BTS' historic win at the Billboard Music Awards in 2017, the Korean Tourism Organisation engaged BTS to release a song to promote Seoul, and its official website crashed with the huge influx of online visitors. Tourism in South Korea also received a boost from the 2018 Pyeongchang Winter Olympics, perhaps South Korea's greatest and most successful display of cultural and sports diplomacy yet.

Singapore, which slips one place, need not be too concerned. The high-tech city-state continues to top the Enterprise sub-index, and is widely considered the Asian financial hub of choice due to its favourable business conditions, rule of law, and innovation-fostering environment. Singapore also performs well in the Digital sub-index, helped by its excellent digital infrastructure, efficient government online services, and Prime Minister Lee Hsien Loong's savvy use of social media. Its small size limits its ability to perform in the Engagement and Culture sub-indices, making its use of digital diplomacy all the more important. Its 2018 ASEAN chairmanship is a unique opportunity to shape its international role in bringing prosperity and stability to the region, and it should ensure that its diplomatic efforts are matched by digital efforts.

While Japan and South Korea have climbed up the ranks in The Soft Power 30, China slips two places to 27th. Last year, we suggested that US President Donald Trump's isolationist "America First" approach was an opportunity for China to shoulder some of the global responsibility – something we first saw when President Xi Jinping spoke at Davos in 2017. China has gone on to promote the "Golden Era", driving its Belt and Road Initiative and investing heavily in deepening bilateral ties around the world. China improved in the Engagement sub-index, a reflection of its commitment to greater international engagement, as its network of embassies and cultural missions continues to expand.

China's greatest soft power resource lies in culture. Strong performances across art, sport, and tourism metrics are testament to China's rich and diverse cultural assets. It is home to the second highest number of UNESCO World Heritage sites, and rivals the US in Olympic sporting

performance. China's soft power is further boosted by the opening of hundreds of Confucius Institutes, extensive international branding initiatives, as well as the global success of brands such as Huawei and Alibaba. However, China's political approach continues to sit at odds with its soft power pursuits. As global audiences become increasingly connected and informed with the help of digital technologies, China must be authentic in its soft power pursuits, and demonstrate a commitment to the global good.

Beyond the top four countries, Taiwan* is the next best performer, just missing out on the top 30. Taiwan has much going for it in soft power terms. Its top soft power assets are found in the Enterprise and Government sub-indices. However, Taiwan is significantly hampered by an extremely low Engagement score, owing to the fact that the vast majority of the world's countries do not recognise it as a state. This difficult hurdle to overcome is one of the main factors keeping Taiwan out of the top 30.

After Singapore, Thailand and Malaysia put in the next best performances for ASEAN countries. Thailand's best performance is in the polling, where it ranks 25th overall. It is interesting to note Thailand's reputation – as assessed by the polling data – eclipses its performance in the objective metrics of soft power. It performs best in the Government, Education, and Digital sub-indices, while scoring well below the average for all countries in the Engagement sub-index.

Turning to Thailand's ASEAN neighbour, Malaysia, the surprise electoral defeat of Prime Minister Najib Razak and election of Dr. Mahathir Mohamad has sparked an air of excitement and change in the region. This could be an important milestone for Malaysia and it will be interesting to see how the new government will impact global perceptions and metrics of Malaysia's soft power.

Amidst the shifting geopolitical landscape, it is more urgent than ever that India emerges and takes on a more prominent role on the global stage. Despite India's vast cultural resources, such as Bollywood and Indian cuisine, this does not translate well into the Culture sub-index. India's best performing area is in the Digital sub-index. This is largely due to Prime Minister Modi's unrivalled skills in digital diplomacy, which have been emulated by other government ministries. The Ministry of External Affairs was one of the first in India's government to adopt Facebook. With more than two million followers on Facebook alone, the MEA is using digital platforms to reach an entirely new demographic. India faces a wide variation of challenges ahead, but leveraging tools in digital diplomacy will be an essential step in translating existing, objective assets into soft power.

* Taiwan is an autonomously governed territory claimed by China

Amidst the shifting geopolitical landscape, it is more urgent than ever that India emerges and takes on a more prominent role on the global stage.

Two more ASEAN member countries round out The Asia Soft Power 10, with Indonesia and the Philippines ranking ninth and tenth respectively. Both countries have two very high-profile heads of government, though with starkly contrasting styles. Indonesia's best-performing sub-index is Government. The Philippines puts in an unexpectedly strong performance in the Digital sub-index, its best score across the index. Both, however, fall down on the Culture and Engagement sub-indices, and struggle to find much positive cut-through with international public opinion.

Going forward, we will update the new Asia Soft Power 10 each year and further explore how the rise of Asia is changing the global balance of soft power and geopolitics more widely.



5.0

New coalitions of the willing & emerging issues

5.1 For NGOs, we live and die by soft power

5.2 Malaria elimination: the role of public and private leadership

5.3 Soft power and global health diplomacy: the rise of France

5.4 Global collision or international collaboration? Addressing a framework for cyber policy

5.5 The future of diplomacy takes root in cities

Perhaps the most obvious paradox of The Soft Power 30 research project is that the nation-state remains the key unit of analysis, even though we have – since our inaugural report – made the case for the importance of non-state actors in shaping foreign affairs. As we – and others – have argued, power in global politics is not only shifting from West to East, but also away from governments altogether, as non-state actors begin to play a larger role on the world stage.¹

As this is the case, we began exploring the role non-state actors play in global affairs through a series of case studies in our 2017 report. The following chapter builds on the insights from last year’s case studies and looks at five new case studies that highlight the role non-state actors play and how governments can work effectively with non-state actors.

The following essays look at issues that include city diplomacy, tackling global health challenges, and even how governments and industry need to approach cyber security and governance. These essays further underline the importance of soft power in bringing together diverse networks of actors to take action – be they governments or non-state actors.

¹Nye, J. (2011) *The Future of Power*, New York, Public Affairs.

5.1 For NGOs, we live and die by soft power

“What are we still waiting for?” I nervously asked the team that had come to pick me up at Kandahar airport, located in the middle of an active warzone. I was anxious to get back to the relative safety of the International Committee of the Red Cross' compound in Kabul, where I was staying during this trip as the incoming head of communications. “We are waiting for a message from the Taliban guaranteeing our safe passage to the compound”, was the casual answer I received in response.

Red Cross cars being neither bulletproof nor allowed to carry weapons was a stark reminder that the only thing protecting us in this dangerous environment was the power of an idea: “those carrying the Red Cross (or Red Crescent) emblems must not be attacked”. The idea is so powerful, it was encoded into international law, yet it often is not the legal protection the Geneva Conventions afford the bearer of the emblem, but the soft power it commands that ensure staff and volunteers' acceptance – and (relative) safety – by warring groups.

To ensure their continued acceptance, the Red Cross sends out scores of communicators every day to meet rebel groups and regular army personnel, explaining the mandate and nature of its work anew. Acceptance is perhaps the most prized manifestation of soft power to humanitarians. The equation goes something like this: acceptance means security (put differently: people who accept you, do not shoot you). Security, in turn, means access to those the Red Cross has come to help, whether in a state prison or in a remote valley or jungle controlled by rebels.

However, the norms that uphold the balance of this equation are increasingly showing cracks. As I write these lines, my former colleagues at the International Committee of the Red Cross mourn the coldblooded killing of a colleague in Yemen, confirming a trend that humanitarian work has become more dangerous over recent years. Is the soft power of humanitarian agencies waning? What can be done to reverse the trend?

Trust is another aspect of soft power for the non-profit. Not just in the humanitarian sector, non-profits rely on it to sustain their very existence. Trust inspires citizens to donate or not. Trust enables organisations to shape policy debates and inspires us to change our behaviour, to recycle more, shun certain products like the fur of endangered species, and push governments to ratify treaties banning landmines. This trust can also be misused: the Colombian military once infamously disguised some of its operatives as Red Cross staff to infiltrate a rebel



outpost to free a hostage. Needless to say that real Red Cross workers are, in some regions, still treated with suspicion today. Trust, as a core component of soft power, is easily lost.

Acceptance, trust, the ability to inspire and to persuade: for most non-profits, these are the most prized assets that enable them to save lives, change behaviours, and push governments to do better by their citizens. Reputational crises such as that experienced by Oxfam (a few staff were found to engage in sexually abusive practices in their countries of deployment) can quickly become an existential threat.

Moral authority, another facet of soft power, is looked to whenever the world's intractable crises become acute and require urgent attention.

Kofi Annan's moral authority, acquired over a lifetime working for the United Nations combined with an exceptional gift for quiet but charismatic leadership, translates into the ability to influence, persuade, and convene like few others can. It is the currency that allows the Kofi Annan Foundation to achieve results.

This currency is used in a multitude of ways, including public and private interventions and mobilising those leaders with the power to make a difference. I broke down the different methods into three categories in an attempt to explain how the Kofi Annan Foundation uses its soft power on a daily basis.

Private diplomacy:

Sometimes, discrete interventions are best suited to trigger swift action. To illustrate, in 2014, as the Ebola crisis spread across West Africa, several West African states proceeded to close their borders, hindering medical staff and critical supplies to reach the most affected. Kofi Annan's phone diplomacy, reaching out to several West African heads of government directly, was critical in leading to many reversing their decision and enabling aid to reach those in need.

Public advocacy:

Already in his function as Secretary General, Kofi Annan used public communication as a strategic tool like few UN chiefs had done before him. "I often decided to speak out on a human rights violation occurring in any given country to provide cover for activists on the ground. I knew that they could not say what I could for fear of persecution. My words gave them a shield to hide behind and eased the pressure authorities exerted on them at least temporarily." Over the past six months alone, Kofi Annan has formally expressed himself on rights abuses and other burning topics in over 20 different cases, often jointly with other leaders.

Convening power:

The cultural anthropologist Margaret Mead famously said: "Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has." Convening a group of individuals who, with their combined knowledge, influence, reach, and/or experience, can make a significant difference, is among the foundation's most effective uses of soft power.

Kofi Annan and his foundation have convened corporate leaders, youth activists, academics, and political actors to address the illicit drug trade in West Africa, violence in Myanmar, and violent extremism among the young to cite just a few. As we speak, Kofi Annan is planning to unite tech leaders from Silicon Valley with elections experts and political leaders to examine the threats and opportunities to elections and democracy in the digital age.

Whether through trust, acceptance, or moral authority, soft power enables non-profits to achieve remarkable feats without political authority, significant financial leverage or legal entitlement. It is hard to build up, difficult to quantify, essential for success, and can be lost in the blink of eye.

Far too much of the existing research and discussion on soft power is focused on nation-states, from a government perspective. More empirical work on NGOs and soft power would benefit the philanthropic and development sectors. In truth,

a soft power index for non-profits is long overdue. Such an exercise would certainly help determine the real worth of top NGOs, and assess their ability to achieve results. At present, this is almost impossible to ascertain. Beyond traditional marketing and branding efforts, more reliable metrics would lead to the sector investing more resources into building up and safeguarding their soft power. Better communications would just be a first step; it would have to mean better compliance, to lead by example on all levels. For those working in the world's danger zones, it can mean the difference between life and death.

Bijan Frederic Farnoudi

Kofi Annan Foundation



5.2

Malaria elimination: the role of public and private leadership

The defining challenges of the 21st century exist beyond borders. They are global in nature, addressed only through collaborative effort. One such challenge is malaria. There have been ups and downs in the struggle to eliminate the disease, and at present, the world's fight against malaria is at a critical juncture. Malaria once threatened billions of lives throughout Asia and the Pacific. But, with a series of smart investments in malaria control – backed by political commitment to ending malaria for good – countries in the region have halved the number of malaria cases and deaths in less than fifteen years.

Despite unprecedented progress, malaria elimination has never been more urgent. In the countries surrounding the Mekong region, existing malaria medicines are starting to fail due to emerging resistance. The world experienced a similar pattern in the 1960s, when malaria had been almost eliminated from countries in Africa and Asia using chloroquine, initially an effective drug. But by 1990, resistance to chloroquine had spread to all continents, leading to a global resurgence increasing child mortality by up to five times in some countries. If we fail to eliminate malaria, we may see history repeat itself.

A problem without borders requires a borderless solution. In 2013, at the East Asia Summit, the leaders of eighteen countries in Asia Pacific attempted this with the creation of the Asia Pacific Leaders Malaria Alliance (APLMA). The Alliance was designed to strengthen and align efforts to fight malaria; improving coordination, facilitating greater collaboration, and ultimately eliminate the disease by 2030.

In effect, APLMA is the embodiment of a regional approach to solving global challenges. The Alliance serves as shining example of what the East Asian nations (ASEAN+8) can do when they come together to progress a common goal. Supported by increased domestic financing and shared political leadership, the initiative has helped drive change for the better in the fight against malaria.

The invisible emergency

While it sounds counter-intuitive, progress to date in combating malaria – pushing it out of thriving regional capitals – means the disease is also becoming an increasingly invisible scourge in Asia Pacific. It now mostly affects the poor and marginalised populations in the region. As the disease falls down the list of nations' priorities, it makes it all the more difficult to sustain essential political and financial commitments.

Over the past 70 years, malaria has resurged more than 30 times when efforts to fight and control the disease have slowed. And when malaria comes back, it hits populations who are more susceptible to the disease.

Engaging the corporate sector

APLMA is working to guard against this deadly complacency settling in again. But this is a problem that cannot be tackled by the public sector alone. In addition to working effectively across national borders, eliminating malaria requires sustained collaboration between the corporate, public, and philanthropic sectors.

By turning business leaders into champions for malaria elimination, their impact will go well beyond the money they raise. The strength of the M2030 initiative lies in the broad and unique set of partners that constitute this new network, including: the Tahir Foundation from Indonesia; the DT Families Foundation from Thailand; the Global Fund to Fight AIDS, Tuberculosis and Malaria; Shopee, a leading e-commerce platform in Southeast Asia and Taiwan; the Dentsu Aegis Network; and Yoma Strategic Holdings from Myanmar. More corporate partners are joining M2030 in 2018 and 2019.

Together, the partners will reach millions of people over the next few years, to mobilise resources for programmes that will help bring an end to malaria, as well as propel the public awareness needed to keep the political commitment alive.

"It's a race against the clock - we have to eliminate it before malaria becomes untreatable again and we see a lot of deaths."

Professor Arjen Dondorp,

Mahidol-Oxford Tropical Medicine Research Unit, BBC, 22 September 2017.



These are still early days for M2030, but the unique combination of business leadership, public engagement, and a smart strategy to drive results, has the potential to yield huge results for social change and serve as a pathfinder for solving other global challenges.

APLMA partners with private companies in numerous countries, including India, Thailand, and others in the Mekong region, and has embarked on a new initiative to bring the full weight of the private sector in Asia to bear on the malaria end-game. The latest vehicle for this international network of partners, M2030, is both a brand and movement that brings corporations and consumers together to fight malaria.

Founded by APLMA, M2030 partners can use the brand for campaigns, products or services. In return, they pledge funds to fight malaria in the countries where the money was raised, working with the Global Fund as a fiduciary partner. But, M2030 is about much more than simply driving malaria funding.

Large corporations in Asia have their fingers on the public pulse, reaching millions of consumers through their marketing and social media platforms. By leveraging these, the M2030 movement will seek to educate the public about the benefits of elimination. Reaching the emerging urban middle class – Asia's growth engine – ensures they are as informed and committed to elimination as their governments are.

Benjamin Rolfe and Patrik Silborn

Asia Pacific Leaders Malaria Alliance



5.3

Soft power and global health diplomacy: the rise of France

France has experienced a meteoric rise to become a world leader in soft power – topping the 2017 Soft Power 30 ranking. As defined by Joseph Nye, soft power is the ability of a country to influence the actions of others without force or coercion². France’s influence is perhaps most prominent in global health, which overlaps with international security, economics, politics, and human rights. Since 2000, France has played an active role in the development of key global health initiatives and led multilateral efforts to provide health-related assistance³. France’s funding for health-focused development assistance increased threefold between 2002 and 2013⁴. In particular, France assumed a leadership role in global health governance, worked to safeguard global health security through effective responses to epidemics, and elevated the threat posed by climate change to a global health priority.

Multilateral leadership and global health governance

France channels most of its funding for global health through multilateral organisations, including the GAVI Alliance, World Health Organisation (WHO), Unitaid, and the Global Fund⁵. In May 2018, France announced that it would host the sixth replenishment conference for the Global Fund to Fight AIDS, Tuberculosis, and Malaria (Global Fund) in 2019. The replenishment conference aims to raise new funds and mobilise partners to eradicate the three diseases by 2030. Held once every three years, the conference convenes leaders from governments, civil society, the private sector, and communities affected by the three most devastating infectious diseases. According to the Global Fund, France is its second-largest donor, having provided the organisation with more than €4.2 billion since 2002⁶.

As one of the founding members of the organisation, France has contributed substantially to the design of the Global Fund in many ways⁷. Today, France continues to guide the work of the Global Fund through its participation in the organisation’s board as well as its strategy and audit and finance committees.^{8,9} Using its broad diplomatic network, France helps more than 35 countries achieve the goals set out in their Global Fund grants by serving as an active member of these countries’ Country Coordination Mechanism, a national committee that oversees the submission of funding requests to the Global Fund as well as the implementation of grants.¹⁰ Since 2011, France has allocated approximately €18 million per year to the Global Fund to provide countries with technical assistance through the “5% Initiative” for IDS, TB, and Malaria.¹¹ In 2017, France increased the proportion of funds set aside for technical assistance from five to seven per cent.¹²

In 2006, France introduced a tax on all flights departing from French airports and, since then, this tax has collected more than \$2.5 billion to finance innovations in the fight against HIV/AIDS, tuberculosis, and malaria. The French government successfully designed the tax to limit its impact on the competitiveness of the airline industry and on France as a destination. In the years following the launch of the tax, France has remained the world's top tourist destination – welcoming more international visitors than any other country.¹⁴ More importantly, Unitaid – the organisation that receives the funds from this tax – has made it possible for eight out of ten children with AIDS worldwide to receive treatment, 345 million anti-malaria treatments to be distributed globally, and two million tuberculosis patients to obtain treatment.¹⁵ Unitaid has also been able to reduce the price of HIV/AIDS drugs for children by 80 per cent and for adults by 60 per cent, the price of a new drug against malaria by 85 per cent, and the price of tuberculosis tests by 40 per cent.¹⁶

Global health security and epidemic response

After the H1N1 outbreak in 2009, France took stock of all of the challenges that hindered its response and launched the REACTing initiative (REsearch and ACTion targeting emerging infectious diseases) to improve research preparedness in the absence of a crisis and optimise research capacity during a crisis. REACTing is a national collaborative network of organisations and research groups that cover public health-related fields. REACTing strengthens its collaboration with low- and middle-income countries and serves as a single point of contact for international organisations. At the height of the 2014 Ebola epidemic in West Africa, REACTing mobilised

Since 2000, France has played an active role in the development of key global health initiatives and led multilateral efforts to provide health-related assistance. France assumed a leadership role in global health governance, worked to safeguard global health security through effective responses to epidemics, and elevated the threat posed by climate change to a global health priority.

a multidisciplinary team of experts that assessed the epidemic, addressed key research issues, and defined the research priorities. The team launched several projects in less than two months, which provided important information on diagnosis and treatment among other topics.¹⁷

A year later, REACTing convened experts and local stakeholders in Martinique, Guadeloupe, and French Guiana to address key research issues surrounding the Zika outbreak, including the association between Zika virus infection and microcephaly.¹⁸ A profile of the French government's response to the 2016 Zika outbreak described how the country was able to rapidly mobilise all required expertise and strengthen specific aspects of its healthcare system.¹⁹

In May 2017, France expressed serious concern about the spread of cholera in Yemen, which suffered the world's worst outbreak in modern history.²⁰ In addition to calling for a political solution to the conflict, France donated €2 million to provide emergency assistance to the people of Yemen.²¹ Five months later, France hosted an international meeting in which governments, WHO, aid agencies, and donors pledged for the first time in history to prevent 90 per cent of cholera deaths by 2030.²²

Climate change and health

France has also used its diplomatic strength to bring controversial issues to the forefront of global health. For example, France has led the international community in defining climate change as a serious threat to health. According to WHO, climate change affects the social and environmental determinants of health – clean air, safe drinking water, sufficient food, and secure shelter.²³ WHO projects that climate change will cause approximately 250,000 additional deaths per year, from malnutrition, malaria, diarrhoea, and heat stress between 2030 and 2050.²⁴ In addition to the loss of life, climate change will also have severe financial consequences.²⁵ Recognising the magnitude of the threat posed by climate change, France has made combating climate change one of its top diplomatic priorities.

Prior to the establishment of the Paris Agreement, the French government laid the groundwork by organising meetings with various governments and collaborating with think tanks and international organisations to generate ideas for combating climate change and preventing the worst consequences. In December 2015, France led the negotiations that resulted in the Paris Agreement, an international binding treaty that 196 representatives signed during the 21st Conference of the Parties of the United Nations Framework Convention on Climate Change (UNFCCC) in Paris. In July 2017, one month after US President Donald Trump announced his

intention to withdraw from the agreement, France's environment minister, Nicolas Hulot, announced France's five-year plan to ban all petrol and diesel vehicles by 2040.²⁶ Hulot also stated that France would no longer use coal to produce electricity after 2022 and that up to €4 billion will be invested in boosting energy efficiency.²⁷ In partnership with the United Nations and World Bank, France hosted the One Planet Summit in Paris in December 2017.

Because no one country can protect the health of its people on its own, the ability to bring various stakeholders together and come to a consensus is a prerequisite for mitigating health-related challenges and saving lives. France's example shows that soft power can be the key to improving global health outcomes.

Tara Ornstein

USC Center on Public Diplomacy



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¹³ The Local (2018) “Why France is still the most visited place on earth”, *The Local*. <https://www.thelocal.fr/20180118/france-retains-crown-as-most-visited-country-on-earth>

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¹⁵ Douste-Blazy, P and Philipp, R. (2017) “No Pain Big Gain. How Micro-levies Save Lives”, *Foreign Affairs*, New York, 25 October. <https://www.foreignaffairs.com/sponsored/no-pain-big-gain-how-micro-levies-save-lives>

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5.4

Global collision or international collaboration? Addressing a framework for cyber policy

Picture the images that run through your head when you read about cyber security or hear about cyber threats and resilience. The phrases conjure images of engineers frantically translating number sets into increasingly self-sufficient machines, dark rooms in which hackers assisted by a multitude of inhuman bots and trolls craft sinister plots against an unassuming public, and bewildered policymakers just hoping their teams behind the screens can find a patch, sort a solution, reassure the public that everything is under control. These images are intangible. They are mysterious. They are secretive and they are scary.

For a small but growing community of experts dedicated to building an international framework for addressing cyber policy, attributing cyber-attacks, and building public and private sector momentum around prioritising cyber security, the image is part of the problem. In a world where the conversation around the governance of cyber policy is one of the most relevant and urgent challenges of our time, the first step we must take to establish a global framework around it is to take a step away from the world of computer science and dive straight into the realm of communications to change the narrative – to widen the spectrum of actors who are involved in this debate. Cyber vulnerabilities operate in reverse of traditional defence vulnerabilities. While in the fields of nuclear power, highly-trained Special Forces, elaborately-armored tanks, and aircraft carriers, we are only as strong as the most powerful and most robust amongst allies; in the realm of cyber security we are only as strong as the weakest link. Indeed, 80 per cent of cyber security breakdowns are attributable to the simplest vulnerabilities, not the most sophisticated actors.

Addressing this realisation leads us into one of the most critical realities in creating the right global framework for cyber policy. While it's tempting to address cyber policy in the context of defence, a template based on military and weapons mobilisation fails to provide the appropriate prototype. A far more relevant model comes, for example, from the world of global health. Pandemics, like cyber breaches, evolve as they spread across populations. While the missile strikes a specific, targeted geographical area, a disease spreads through complex exposures involving global travel and trade, similar to cyber attacks impacting vulnerable systems without necessarily having geographic specification or limitation. Equally, algorithmic solutions for addressing cyber attacks are frequently drawn from models based on global health systems. A public trained to vaccinate as part of their yearly routines is a public readily able to translate this defence mechanism to



health check-ups in their digital lives, taken as seriously as the flu. Establishing fresh narratives around cyber security by moving the global conversation around cyber policy beyond the realm of defence is a necessary first step in identifying and deploying a strategy that will work long-term.

Re-framing the conversation around how we describe cyber challenges is also essential to opening a robust, transparent global dialogue. When cyber security is intrinsically linked in the government and citizen mindset to covert operations and military weapons systems, it is consistently over-classified. Indeed, experts agree that until we establish a better ecosystem around addressing and attributing cyber-attacks, we will fall into a pattern of classification as

Cyber vulnerabilities operate in reverse of traditional defence vulnerabilities. While in the fields of nuclear power, highly-trained Special Forces, elaborately-armored tanks, and aircraft carriers, we are only as strong as the most powerful and most robust amongst allies; in the realm of cyber security we are only as strong as the weakest link.

default as opposed to transparency as default. The result is a chronic failure in the global community to respond appropriately to cyber threats – or even understand them. We must take a page from the playbook of, for example, the airline industry, which took transparency as its default approach. Because operational failures in the airline industry are openly available and analysed, the culture within the industry is one of sharing more than it is one of secrecy. Cyber security is currently stuck in a cyclical pattern of secrecy, which in turn creates a culture whereby attacks are covered up as long as possible so as not to give a vulnerable impression to the voting public or to anxious shareholders. At both the state and the company levels, we must make a concerted effort to step up to the plate in establishing openness in dialogue and transparency as a default response. While initially this might introduce some shock to the ecosystem, long-term it will build trust.



The time is now to establish a playbook for the global governance of cyber policy. In truth, the time was yesterday, but in highly innovative environments risks are not weighed equal to opportunity, and the tendency to place faith in the market's ability to reward problem-solving sometimes results in under-investment in issues that would otherwise receive strict attention. While some experts today worry that a strong framework for cyber policy will not take shape until cyber has its "9/11 moment", many agree that with the right global commitment and investment, we can build momentum before a crisis escalates beyond our ability to effectively respond.

We must ask influencers within the technology sector to serve as ambassadors for cyber health, encouraging the public to "vaccinate" themselves to build resilience. We must galvanise tech philanthropists to get involved in funding the research and multi-stakeholder harm observatories that will lead the way in the sharing of information, transparency of attack, and united effort towards response. We must enlist the most-qualified communications experts to craft narratives that bring cyber policy out of the shadows and into an approachable national and international dialogue. And at every step along the way, we must involve government, corporate, technologists, and civil society leaders to ensure that our approach to global cyber policy is, indeed, global. These networks – representative of the public/private partnerships that are absolutely necessary in any pivotal moment of global concern – are vital to introduce a cohesive, well-respected global governance and response framework. Building these networks, and making transparency their default approach, will take trust and the judicious application of soft power. At a time when the majority of people coming online in some of the world's most-populous countries will not speak English, and when some of the countries with strongest expertise in this space do not share democratic principles as the core driver behind cyber security, we cannot disassociate cyber policy from human rights, freedom of expression, and quality of an informed life.

What is more, the trade-offs between transparency and privacy, between cyber security and public safety, and between public sector, private sector, and individual responsibilities need to be more vocally socialised. As the 21st century marches on, technology has changed the ways in which nations and their citizens are empowered. And so the future of cyber policy is emblematic of the values our connected technologies both enable and threaten. Getting this right will not only create a more secure world, but also a fairer, more just one in which the creativity of the many wins out to the power of the few.

Elizabeth Linder

Chatham House

5.5 **The future of diplomacy takes root in cities**

Cities are coming into their own as diplomatic actors, as a matter of both pragmatism and necessity, prompting local leaders to focus efforts to realise their potential on the international stage.

In April, Los Angeles hosted a unique gathering of city officials. In partnership with the University of Southern California and New York City, we brought together, for the first time, seventeen US cities to discuss our role in international relations. The cities at this “Summit on City Diplomacy” spanned the entire country, from Seattle to Atlanta, representing Democratic and Republican mayors, and large and small cities alike.



We decided to meet because, regardless of what is happening at the federal level in the United States, municipal governments have not forgotten the critical role international engagement plays in our country, particularly in each of our cities. We know that in an interconnected world, our citizens directly benefit from local governments leveraging their global ties. And when our communities interact with the world, the best of American values are represented.

At the summit, US cities agreed that we must remain open in outlook and action. Our proactive, constructive engagement with the international community creates jobs and leads to investment in our cities, connects foreign markets to our exporters, bolsters our tourism industries, allows us to benefit from the brightest international students who pay tuition in our universities, and celebrates diverse culture and traditions that enrich our civic life. Perhaps most importantly, our global connections actually give us new residents and fellow neighbours. And the pressing challenges of this century demand responses based in partnership and global cooperation; we work with other countries to keep our residents safe from terrorist plots, transnational criminals, epidemics, and the risks posed by climate. Partnership is the only way to combat these challenges.

While no two cities are the same, city diplomacy is coalescing around shared values such as partnership, cooperation, and inclusion. For some of us, city diplomacy includes our expanding efforts to localise the United Nations' Sustainable Development Goals, where we know that city participation is essential to achieve people, planet, and prosperity by 2030. We also dedicate resources to embrace our immigrant communities, provide trainings and resources for the resident diplomats and visiting foreign officials, and engage our students with global opportunities for expanding their worldview. Many of us work to attract job-creating investment and help our small businesses find opportunities to export.

Increasingly, city diplomacy involves sharing best practices with partners around the world and leading on global challenges. As our national government abdicates its global responsibilities, our cities have taken steps to uphold our commitment to the Paris Climate Accord, and advocated for the Global Compact on Migration to reflect the experience of cities, who are on the frontlines of welcoming newcomers into our communities. We also participate actively in flourishing city networks on a range of issues with global dimensions, from climate change, to violence and equality, to resiliency that allows us to learn from other cities facing challenges of earthquakes, flooding, fires, or economic shocks.

US cities, proudly representing our constituents, remain committed to promoting American values and advancing leadership in the global community. This is a growing movement, and the time for city diplomacy is now.

Nina Hachigian

City of Los Angeles

Penny Abeywardena

City of New York





ALTIMA

6.0

Soft power platforms: old and new

6.1 The transformational (soft) power of museums

6.2 The quest for Reputational Security

6.3 Reimagining the exchange experience

6.4 #UnknownJapan: inspiring travel with Instagram

6.5 Table talk: bringing a Swiss Touch to the American public

6.6 Soft power and the world's game: the Premier League in Asia

6.7 Public diplomacy and the decline of liberal democracy

6.8 Fighting back: fake news, disinformation, and the question of sharp power

6.9 Hard laws, soft power

By design, The Soft Power 30 index recognises and embraces the diversity of the various elements that make up the sources of a country's soft power. The following essays in this chapter delve into a range of different platforms, programmes, institutions, and engagement tactics that help generate and leverage soft power.

6.1

The transformational (soft) power of museums:

At home and abroad

Tristram Hunt

Victoria and Albert Museum

Twenty years ago, the landmark opening of Guggenheim Bilbao signalled a new role for cultural institutions in promoting urban regeneration. Today, museums lead place-making, civic exchange, tourism, economic development, learning programmes and community development. New developments at the V&A - the world's leading museum of art, design and performance - certainly fit this pattern. Opening this September, V&A Dundee is part of the culture-led regeneration currently transforming the Scottish city. V&A East in Stratford's Olympic Park is set to reach a new and different museum audience. Our DesignLab Nation initiative is supporting the teaching of the relaunched Design & Technology GCSE nationwide. And the V&A Museum of Childhood in Bethnal Green has the capacity to transform the life chances of some of Britain's most disadvantaged children.

But with the opening of Louvre Abu Dhabi, the upcoming National Museum of Qatar and the Hong Kong Palace Museum in the West Kowloon Cultural District of Hong Kong, the museum has in recent years regained an important part of its earlier role: nation-building. When the French Republic established the Louvre in the 1790s, the painter and revolutionary enthusiast Jacques-Louis David described its purpose: 'The museum must demonstrate the nation's great riches...France must extend its glory through the ages and to all peoples: the national museum...will be the admiration of the universe.' Today, that mission has assumed a new urgency in a diplomatic landscape where cultural power - despite the kinetic ambitions of leaders in America, Russia, Turkey, and elsewhere - matters more than ever.

This realisation partly accounts for mainland China's decision to undertake state-led cultural projects on such an ambitious scale. The country recently announced the building of an entirely new 988-acre city located just outside Beijing. Valley XL will be dedicated to the arts, and include a museum, exhibition space, offices, and performance venues. This is just one of thousands of purpose-built cultural towns across China, all with a keen hunger for intelligently curated content.

Yet whereas the great encyclopaedic museums of the Enlightenment once stood as bastions of imperial prowess – demonstrations of 'hard power' displaying plundered cultural riches as shows of state hegemony – today, that relationship is subtly shifting. It is the language of 'soft power' that now suffuses the work around international museum partnerships.

Cultural institutions don't just exert soft power, they equally foster cultural diplomacy through international outreach, knowledge exchange, and creative leadership.

Established arts institutions, like the Louvre and Guggenheim, the V&A and Pompidou, are leveraging their cultural capital to support outward-focused global aspirations.

As is now well-established, soft power – the ability of both state and non-state actors to bring positive attraction to bear on international audiences – eschews many traditional foreign policy tools of coercion. Instead, soft power strategies seek to draw on more organic resources that make a country naturally attractive to the world. It is well accepted

that the UK's soft power assets – the accumulated strength of our museums, universities, arts, and cultural organisations – are fundamental to the country's global reputation. Even in the face of so much negative commentary surrounding Brexit, immigration policy, and sluggish economic growth, the UK's first place position in Portland's 2018 global Soft Power 30 is testament to this.

This characteristic of soft power is what one King's College London report has labelled as 'standing out': the ability for countries to differentiate themselves. The export phenomenon of the UK's creative industries is a great example of this global magnetism.

Soft power's huge political potential is now increasingly being harnessed by international powers to 'stand out' on the world stage. From new investment in Institut Français to archaeology projects in Saudi Arabia to President Macron's plans for repatriating colonial artefacts to Africa, French cultural exertions were rewarded last year with the world's top soft power ranking. Macron's repeated rhetorical distancing of himself and his administration from the colonial past, as a diplomatic pathway for France to the Global South, will soon have to be underpinned by

significant cultural activity. For cultural institutions don't just exert soft power; they equally foster cultural diplomacy through international outreach, knowledge exchange, and creative leadership.

The same King's College report refers to this complementary trait as 'reaching out'. The V&A crucially does both, and the extent of our international initiatives – at home and abroad – work to underpin this.

Our exhibitions have reached every continent worldwide. Over the past three years, the V&A's touring exhibitions have been seen by around five million visitors in 40 countries. Two million people have now seen the 2013 V&A exhibition, David Bowie Is, after it travelled to 12 countries in five years. At a time when so much of Britain's image abroad is shaped by the old, deep England of Downton Abbey and Windsor weddings, the sort of counter-narrative presented by the divergent, creative brilliance of Bowie offers an insight into a refreshingly different Britain.

And in December 2017, the V&A's first international gallery opened at Design Society in the UNESCO-designated Design City of Shenzhen, south-east China, last year. This innovative partnership between the V&A and China Merchants Group - the first between one of the oldest and most influential companies in China and a public institution in the UK – has been premised around a mission of 'international content, but with local relevance'. For a museum dedicated to exhibiting, interpreting, and promoting design, it feels very natural to be in a city which is shaping design for one of the world's largest industrial areas, the Pearl River Delta.

So whilst the V&A hopes to 'stand out' as a globally renowned international brand, we also 'reach out' to foster partnerships with international lenders, borrowers and citizens; build reciprocity and trust; and provide an innovative, and often revolutionary, sense of what contemporary British culture and identity can offer. Our international collections – across V&A sites and loan venues – are an important tool of everyday cultural diplomacy.

What I think this work reveals is a distinctly civic notion of art and culture, connecting people in ways that politics cannot. This is a viewpoint that has – in our modern times – divorced soft power from the state. The power of Hollywood or the reach of the BBC is sustained by their independence from Washington or Westminster. The global triumph of Hamilton the musical shows how the current incumbent of the Oval Office has not dimmed the allure of America. But the sheer might of France's new ambitions abroad and China's new culture cities is also revealing the need for much more strategic state support here in the UK.



As public funding for the arts continues to fall – and with the budgets of the BBC, British Council, and Arts Council England all under pressure – it is going to prove a real challenge to retain our global influence. What is more, continued investment in the cultural vehicles that generate British soft power and foster cultural diplomacy will only become more vital as the Brexit process continues. Culture, debate, and art are the keys to keeping Britain open to the world.

Soft power matters. Our national museums and cultural institutions are world leaders. But in an ever more mercantilist and zero-sum geopolitical world, we need to develop a new template for a mix of state-led ingenuity, vision, and spirit of collaboration. That is what post-Brexit Britain, 'Global Britain', requires to keep punching above its weight on the global stage.

6.2

The quest for Reputational Security:

Interpreting the soft power agenda of Kazakhstan and other newer states

Nicholas J. Cull

USC Center on Public Diplomacy

One of the problems for soft power as a concept is that it is overly identified with the countries at the top of the heap: the US, France, Germany, Britain, and so forth. Media coverage of The Soft Power 30, as with other measures of international reputation like the Anholt-GfK Nation Brands Index, focuses on the highest places rather than the underlying trends. These measures by their own admission limit themselves to the most visible countries in international space. In an era of renewed international rivalry and volatility, our understanding of the picture must change. Newer or weaker countries (or those actively engaged in disputes) are not simply seeking to build their soft power as a luxury add-on to boost exports, tourism or foreign direct investment. They need soft power for the same reason they need the hard power assets of a standing military: core security. Such vulnerable nations are seeking to develop Reputational Security.

I would define Reputational Security as the degree of safety accruing to a nation state that proceeds from being known by citizens of other nations. While it often helps most to be known for something positive, simply being known is of some benefit. A country with Reputational Security is accepted as legitimately sovereign over its territory, not just in law but also in international public perception. It is appreciated as a member of the international community and seen as an integral part of the fabric of that community. People are interested in news from the place and should it be threatened, they see its preservation as a foreign policy priority. Reputational Security (like any form of security or the entire category of soft power) is hard to measure, but there are good historical cases of its cultivation. One way to read Britain's cultivation of American public opinion at the outset of World War II, is to see a

growth in Reputational Security as the US public came to see the preservation of Britain as a greater priority than remaining strictly neutral in the war.¹

Newer or weaker countries (or those actively engaged in disputes) need soft power for the same reason they need the hard power assets of a standing military: core security.

It is sometimes easiest to identify a dimension of international society by its absence. This is certainly the case with Reputational Security. Ukraine had military and trading partners as of 2014 but certainly did not have Reputational Security. The thing that the country was best

known for – having been part of the Soviet Union and maintaining a complex set of interconnections to Russia – did not help when the Ukraine crisis struck. Rather the public's knowledge of Ukraine's former connection to the USSR made the Kremlin's narratives about loyal separatists looking to reconnect to the old motherland seem plausible. Ukraine was not seen as contributing anything important as a singular and unified entity that would be lost if a neighbour's military intervention chipped away at a province or two. It did not help that a wave of disinformation and uncertainty confused the picture for the international public, but sympathy for Ukraine and its plight was plainly much more limited than, say, international concern for the integrity of Poland during the martial law crisis back in 1981-83.

It is possible to see countries actively seeking to develop Reputational Security. The intense work of Kosovo's formal diplomats to get recognition for their country has been matched by work to place the country on the mental map of Europe through its award winning Saatchi & Saatchi "Young Europeans" branding campaign and contributions to international cultural events like the Biennale of Art and Architecture in Venice. For Taiwan, survival hinges on the polity's ability to maintain

an international perception of its identity as something distinct from mainland China, whose survival in some unique form is of value to the wider world.² The most obvious strategy of reputational survival is perhaps that of the government of Nursultan Nazarbayev in Kazakhstan.

Since independence on the breakup of the USSR in 1991, President Nazarbayev has pursued a range of strategies that have not merely sought to develop his country's economy, but to build its relevance and reputation among global audiences. In the first instance there has been a symbolic diplomacy of place and space. Nazarbayev moved the capital from Almaty to Akmola, renaming the city Astana (the Kazakh term for capital) in 1998. The government set about building a planned city of towers and memorials in much the same way as the place-builders of the past who created Washington DC, Canberra, Brasília, and other "concept" capitals. The overall design was that of Japan's Kisho Kurokawa and some of the world's leading architects contributed buildings especially Foster + Partners. The city was recognised by UNESCO as a city of peace in 1998.

Kazakhstan has also been a great joiner. In 1996 Kazakhstan was a founder member of the Shanghai Five group (which brought together China, Russia, Kazakhstan, Kyrgyzstan, and Tajikistan) and became a driver of its successor, the Shanghai Cooperation Organisation (SCO) launched in 2001; Kazakhstan hosted summits in 2005, 2011, and 2017. Kazakhstan is an active member of the post-Soviet structures: the Collective Security Treaty Organisation (CSTO) and Eurasian Economic Union (EAEU), but was in 1992 the initial proposer of the Conference on Interaction and Confidence-Building Measures in Asia (CICA). The organisation convened in 1999 and now includes 26 member states.³

Along similar lines, in 2003, Kazakhstan launched the Congress of Leaders of World and Traditional Religions, which brings global religious leaders together on a triennial cycle in Astana. The underlying idea is to combat extremism through inter-faith dialogue and share the ethic of tolerance which Kazakhstan claims a national characteristic. This was framed as a major contribution to one of the most significant problems facing the world, and so central to the President's agenda that a small memorial for the first meeting was added to the chamber at the national memorial "Baiterek" tower in the centre of Astana. The second meeting in 2006 had its own spectacular building, a 77 metre tall glass pyramid – the Palace of Peace and Accord – created by Foster + Partners. The next congress is scheduled for October 2018.⁴

Since independence, President Nazarbayev has pursued a range of strategies that have not merely sought to develop his country's economy but to build its relevance and reputation among global audiences.

Kazakh educational policy has been similarly oriented to building an international reputation and preparing citizens for global engagement. The country has an extensive system of sending students overseas for

higher degrees, and is also seeking a place in a global academic conversation. The key moment was the founding of Nazarbayev University in Astana in 2010 with English as its medium of instruction. The government has required all post-elementary STEM education to be delivered in English, and plans to introduce Roman letters as the script of the country in place of Cyrillic by 2025. The model is Singapore rather than Dubai. There is no thought of bringing internationally operated campuses to Kazakhstan.⁵

Some of the country's cultural diplomacy events have seemed as oriented towards pleasing a domestic audience as building an international reputation, but governments also require a degree of Reputational Security among their own citizens. The range of film festivals which have been tried such as the Eurasia International Film Festival, which launched 1998; "Shaken's Stars" International Film Festival (aimed at young filmmakers) which began in 2003; the International Astana Action Film Festival (the only one dedicated to the action film genre), which ran from 2010-2012; and the Almaty Indie Film Festival, which began in 2017. Such events have even drawn visits from western film stars. An image of Nicolas Cage as a Eurasia Festival guest looking dazed in Kazakh costume was a brief Internet meme in the summer of 2017.⁶ Yet they also reflect an attempt to build Kazakhstan into an international media conversation.

The desire to develop its reputation certainly underpinned the interest of Kazakhstan in international expositions. This began in 2005 with Kazakh participation in the Aichi, Japan Expo. Energetic Kazakh contributions to the Saragossa Expo in 2008 and Shanghai Expo followed in 2010. With a South Korean Expo at Yeosu on the horizon for 2012, Kazakhstan embraced the notion of hosting an expo as a mechanism and platform to engage with the world. In 2011, the country launched its bid to host the 2017 Expo in Astana. In the summer of 2012, during the run-up to the voting for the 2017 host city, Kazakhstan delivered a spectacular contribution to the Yeosu Expo. Although the theme of oceans was unpromising for a landlocked country like Kazakhstan, the country finessed the issues by focusing on traditional music and dance. Astana's eventual bid beat out that of Liege, Belgium in the voting that autumn. The Kazakh contribution to the Milan Expo of 2015 was even



more accomplished. The pavilion included a traditional music and art performances (including live sand painting), a virtual reality over-flight of the country, a feature of agricultural difficulties such as desertification, and an excellent restaurant with horse meat proudly atop the menu.

The eventual Astana Expo of 2017 was, however, a mixed bag. The architecture – a ring of exhibition spaces around a national exhibit in a giant sphere – was stunning. The theme of "future energy" brought relevant technologies and debates to the fore, and the usual suspects turned out to introduce themselves to Kazakh audiences. France and Germany were especially well-represented, and the pavilions that put on shows like the South Koreans were appreciated by locals. The downside was comparatively lower levels of attendance, widely assumed to be owing to the price of entry. The Expo failed to hit 4,000,000 visitors (compared to the more than 8,000,000 who had attended the similar scale 2012 Expo in South Korea). It was the lowest attendance since the scandalously underwhelming Genoa Expo of 1992. The attempts of the government to boost attendance attracted some negative press, as did logistical issues around the importation of exhibits. Some pavilions had such difficulty bringing materials into the country that they were unable to operate gift shops.⁷ Yet the success may be judged by the fact that fellow former Soviet state Azerbaijan has hastened to develop its own bid to host a major expo in Baku in 2025.⁸

Despite a less than perfect outcome, the value of the Expo in positioning Kazakhstan as a regional leader should not be dismissed. The desire to be known is such that even a virtual slander like the 2006 comedy film *Borat: Cultural Learnings of America For Make Benefit Glorious Nation*

of Kazakhstan is seen as a PR gift by some Kazakh officials. Knowing that Kazakhstan is the "Borat country" gives it a place on the mental map of western audiences which Tajikistan, Uzbekistan, Turkmenistan, and Kyrgyzstan lack. It is a starting point from which more accurate knowledge and an awareness of the country's relevance can be built. When a state means something to the world it is harder for a rapacious neighbour to compromise its sovereignty.

The path Kazakhstan has taken towards Reputational Security does raise questions. The leadership has plainly made choices as to the area in which it will pursue international relevance, prioritising institutional participation and mega events over achievements in – say – the field of human rights which might require a trade off in the ability of the government to manage and direct its own population. True Reputational Security for Kazakhstan will require attention to its reputation for corruption, which although the best in the Central Asian region, according to Transparency International, still requires work.⁹ Yet one gift of Kazakhstan is the government's unshakable focus on the future. Themes of innovation and sustainable energy were at the heart of Expo 2017 Astana. At a time of mounting international crisis, it is important to remember that visions of the future underlay humanity's escape from the World Wars – and the Cold War too. Projects which direct our collective attention away from our differences and obsessions with either an idealised past or historical pain should be welcomed, and even celebrated, right now. Whether in Astana, Moscow, Beijing, or Washington, humanity needs horizons. Governments would do well to consider what we can all do together, not to make country X great again or to avenge the historic slights against country Y, but to make the planet we all share great for everyone with a stake in the future.

¹ Cull, Nicholas (1995) *Selling War: British propaganda and American neutrality in World War II*, Oxford University Press: Oxford.

² This paragraph is based on off the record discussions with diplomats from Kosovo and Taiwan. On *The Young Europeans* (2010) see http://saatchi.com/en-us/news/mm_award_success_for_kosovo_young_europeans_campaign

³ For the official CICA website see <http://www.s-cica.org/>

⁴ *Astana Times* (2017) "Religious congress secretariat sets date for 2018 congress, discusses Kazakh UNSC priorities", *Astana Times*, 22 May. <https://astanatimes.com/2017/05/religious-congress-secretariat-sets-date-for-2018-congress-discusses-kazakh-uns-c-priorities/>

⁵ This paragraph is based on conversations with educational administrators in Kazakhstan. For discussion of the script reform see <https://www.nytimes.com/2018/01/15/world/asia/kazakhstan-alphabet-nursultan-nazarbayev.html>

⁶ @yashar (2017) "Nic Cage is in Kazakhstan..here with the First Lady. It's likely he got paid for this (he's broke), I have reached out to his publicist", Twitter, 24 July. <https://twitter.com/yashar/status/889239804323528704?lang=en>

⁷ Negative takes included that of James Palmer on the Foreign Policy blog: <http://foreignpolicy.com/2017/06/15/kazakhstan-spent-5-billion-on-a-death-star-and-it-doesven-snt-ehoot-lasers/>

⁸ On the Baku bid see <https://bakuexpo2025.com/>. The result will be announced in November 2018.

⁹ On corruption see https://www.transparency.org/news/feature/corruption_perceptions_index_2017

6.3

Reimagining the exchange experience:

The local impact of cultural exchanges

Jay Wang and Erik Nisbet

USC Center on Public Diplomacy

From the earliest days of statecraft, cultural exchanges informed foreign publics of the world beyond their borders. To this day, they remain of enduring importance as a means of promoting peace and mutual understanding while supporting foreign policy objectives. Most major nations have devoted substantial resources and dedicated considerable effort to developing state-sponsored cultural exchange programmes coupled with programmes created by non-governmental organisations and interests.

Typically, these programmes select and sponsor international visitors for short-term stays in the host country, providing opportunities for them to interact with individuals and organisations in the host community. Even though “mutual understanding” is often stated as a programme goal, the overwhelming emphasis is on shaping international participants’ perception and attitude toward the host nation. In turn, programme impact, and its conception, reflects this orientation. Programme impact is generally defined and measured primarily in terms of visitor experience, programme satisfaction, and a “multiplier effect” on their family members, friends, colleagues, and others after their return to their home countries.

Unfortunately, what has been conspicuously missing from traditional evaluations of cultural exchange programmes is a deeper conceptualisation of “exchange.” In other words, fully understanding the two-way flow of information and experience, not to programme participants, but also in turn to local communities and organisations that host them. This local impact of hosting international visitors is an indispensable aspect of the larger goal of creating mutual understanding through cultural diplomacy.

Delivering a distinctive experience to international visitors is essential to programme success. Contemporary exchanges are experience-based rather than information-driven. As we live in an age of information abundance and accelerating flow of ideas and people, information about other countries is now a commodity and easily accessible, while experience – the time spent with people and organisations – becomes more valued. In-person interactions represent a more fundamental form of human experience based on authenticity and mutuality, especially in an increasingly hyper-techno world. As the American playwright David Henry Hwang has noted, cultural exchanges are critical to “forging human connections and exchanging ‘soft power.’”

Moreover, we argue that the consequences of hosting international exchanges are desirable for local communities as they seek to thrive in the global economy and society. As an example, the most export-dependent places in the United States are small rural or suburban counties – according to a Pew Research Center study from 2017. At the same time, the opportunities and resources for organisations, companies, and professionals to have global connections or enjoy foreign travel are limited. Thus, sustaining and growing local economies requires that we provide local communities the resources and opportunities they need to first understand, and then compete, in a global marketplace.

There is overwhelming evidence of the value of exchange programmes to exchange participants. But do local communities also benefit from cultural exchanges?

This in fact is an empirical question. To answer it, we created a conceptual framework for capturing and estimating how exchange programmes impact local communities. In this case, we define “local community” as composed of all the various groups, organisations, and individuals that interact with international exchange participants. This definition is wide-ranging and includes volunteers, youth (K-12 and

higher education students), community leaders, businesses and companies, professional and labour associations, diaspora and immigrant communities, advocacy organisations, arts and cultural centres, economic development and trade bodies, local government agencies, media and journalists, etc.

“Impact” on local communities is defined as creating capital or resources that enables the community to do something better and/or achieve organisational or community goals. Based on our review of the extant literature on community capital and cultural exchange, we identified five categories of “capital” which cultural exchange programmes may impact:

Knowledge Capital Resources that enable one to be better informed about other countries and international affairs. This knowledge impact is manifested in the local communities learning more about the country and culture of the international visitors as well as gaining a deeper understanding of the country’s own foreign policy.

Cultural Capital Resources that enable one to develop cultural literacy, empathy, effective cross-cultural communication skills, appreciation of diversity, and global mindedness. The sort of impact effectuated on the local community could include an expanded global outlook and enhanced cultural competencies through interactions with international visitors.

Social Capital Resources that enable one to connect to larger social networks, international as well as local connectivity. Through hosting and participation, individuals and organisations form social connections – not only with international visitors – that provide opportunities for travel and business collaboration, but also form tighter bonds with other individuals and organisations within the local community that may be leveraged for local needs.

Civic Capital Resources that enable one to develop civic spirit: volunteering, contribution to community, and community belonging. That is community-building by virtue of fostering civic engagement and volunteerism in supporting these exchange programmes.

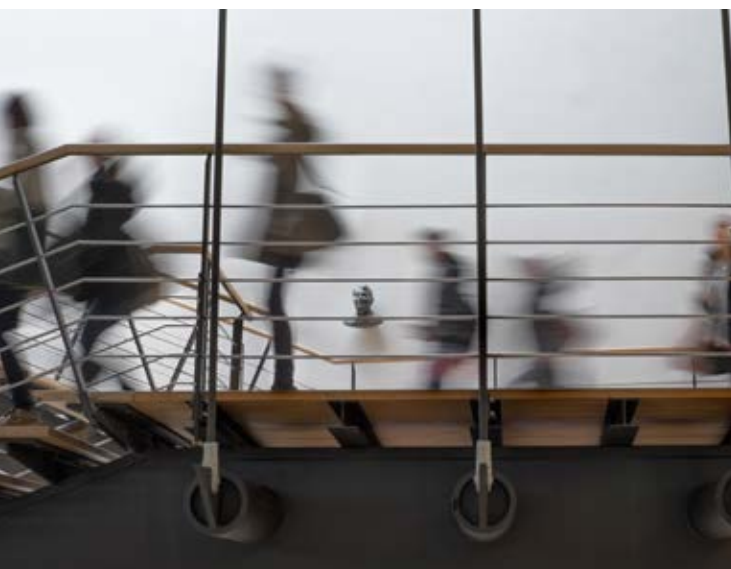
Economic Capital Resources that enable one to develop business connections and opportunities and to improve local workforce through professional capability-building. Through exposure to different cultures, local professionals gain experience and insights that either amplify, or substitute for, formal training in cross-cultural business activities. They have the needed capital to not only pursue international opportunities and interact with foreign clientele, they also are better equipped to function locally in a multicultural environment.



We tested the local impact framework in a pilot study of a major US cultural exchange programme through a survey of individual and organisations involved in hosting international exchange participants. Our study shows that the framework and the employed measures are generally reliable and consistent with qualitative findings.

In short, improving and innovating cultural exchanges requires an understanding of the experiences and impact for international visitors as well as host communities.

Ultimately, if we are to maximise the benefits of both sides of the exchange equation and capitalise on mutuality inherent in dual impacts, we must first fully conceptualise and measure the extent that cultural exchanges improve and enhance the quality of life in their host communities.



Improving and innovating cultural exchanges requires an understanding of the experiences and impact for international visitors as well as host communities.

6.4

#UnknownJapan:

Inspiring travel with Instagram

Max Kellett

Portland

Instagram has fast become an integral part of the travel experience. From waves of people sharing their travels, to the growing number of travel influencers who make a living inspiring people to visit new destinations; the platform has developed into the medium of choice for people to discover, select, and share travel experiences.

Its use in the field of digital diplomacy is also increasing. Recently, we saw this demonstrated on Instagram in Japan. The Japanese Government has a goal to advance a positive global image for the country as part of their goal to draw 40 million inbound tourists annually by 2020. With over five million visitors to Japan posting on Instagram from March 2017 to March 2018, Instagram was a natural place to inspire audiences to visit.

To achieve this, Instagram developed the #UnknownJapan campaign in collaboration with Japan National Tourism Organization. The campaign was designed to highlight and celebrate the lesser-known places and stories throughout every prefecture in Japan.

Instagram worked with local organizations to run in-person meet-ups (InstaMeets) around the country to help educate local users about how they could contribute to the campaign. This empowered diverse



Instagram developed the #UnknownJapan campaign in collaboration with Japan National Tourism Organization. The campaign was designed to highlight and celebrate the lesser-known places and stories throughout every prefecture in Japan.

groups of content creators from across Japan, meaning the campaign was able to crowdsource user generated content from areas of Japanese culture, landscape, and history that are regularly overlooked.

Ranging from personal shots of Japan's most beautiful landscapes; to videos from renowned festivals such as Rural and Labyrinth; illuminating stories about Tokyo's audiophile dive-bars; and intimate shots of dozens of sub-cultures and hobbies, the content served to highlight the cultural richness of Japan to users around the world, while shifting perceptions away from usual stereotypes.

This benefited the campaign by eliciting unique and esoteric content that piqued interest among the global travel community; an audience who are increasingly discerning in their search for new experiences.

It also put the focus on authentic content created by the peers of younger international audiences who generally use the platform, rather than from professional agencies. Doing so encouraged building genuine connections between creators and users. While surrendering control over



the creative process was, in many ways, a leap of faith, it positioned the campaign as a legitimate platform to bring audiences together. As opposed to being just another tourism marketing campaign.

With over 152,000 photos and videos shared by the community, the campaign proved to be a massive success. Inbound tourism figures have also continued to increase, with over 2.9 million international travellers visiting Japan in April 2018 – 12.5 per cent higher from the previous year. Furthermore, the campaign was highly cost effective, with no major production costs or media buys required.

For the diplomatic community, campaigns such as this demonstrate the potential of online platforms, such as Instagram, to bring together public diplomacy, country branding, and economic objectives. The reach and efficiency of digital platforms provide great opportunities for those who can leverage them effectively. However, the ever-changing nature of platforms and the increasingly strategic requirements that come with moving into an area that has traditionally been the preserve of communications and advertising professionals, means diplomats need to focus on raising their digital and creative skillsets.

An example of this has been the explosion of ephemeral content. Now one of Instagram's most popular features, the effective use of Stories necessitates an understanding of narrative development, creative production, and often presenting skills.

For the diplomatic community, campaigns such as this demonstrate the potential of online platforms, such as Instagram, to bring together public diplomacy, country branding, and economic objectives.

In this new context, with the lines between public diplomacy and marketing blurring, it is vital that diplomats learn lessons from other sectors to place strategy and creativity at the heart of their engagement efforts.

6.5

Table talk:

Bringing a Swiss Touch to the American public

Olivia Harvey

Portland

On a blisteringly cold January day last year, Swiss Ambassador to the United States Martin Dahinden joined five climate change experts at the foot of the Matterhorn in Zermatt. Sitting around a handcrafted table - an important feature in this scene - the group discussed the rapidly changing environment and brainstormed ways to reduce the impact of climate change. Their conversation was captured on Facebook Live and other video platforms, and shared across the embassy's social media network.

This was the dramatic beginning of the #SwissTouch adventure.

Swiss Touch is a powerful public diplomacy campaign driven by Switzerland's embassy and consular network in the United States. Multiple channels and platforms are designed to promote Swiss innovation and creativity and connect the Alpine country to America: a series of events held in unusual places around the US; a group of Swiss and American 'Ambassadors' who are experts on a variety of global issues; and a multi-platform social media campaign documenting everything that happens under the umbrella of the programme.





Switzerland is no stranger to innovation and creativity. Lacking in natural resources, the country was transformed through enterprise, research, and knowledge. It now consistently tops the World Intellectual Property Organisation (WIPO) Global Innovation Index, and ranks a close second in The Soft Power 30 Enterprise sub-index. It makes sense for the Swiss Government to leverage this obvious strength as a public diplomacy tool.

It is the handcrafted table that elevates Swiss Touch by linking the online and offline. The table provides a physical platform for exchanging ideas and building relationships. It has been designed to disassemble and travel easily, allowing the campaign to visit all 50 US states. It also serves a more symbolic purpose. Made of Swiss ash tree and incorporating advanced digital elements, the table embodies Switzerland's balance of tradition and innovation a core theme of Swiss Touch. Finally, the table anchors the digital campaign. As we wonder where the table will appear next, the social media team can be creative with sustaining engagement before the next destination is revealed.

This is what makes this campaign particularly powerful: social media transforms the Swiss Touch's physical network into a much wider digital network. Rather than a simple public diplomacy campaign designed to build high-level relationships in closed rooms, Swiss Touch is eager to get everyone involved. The website and social media channels capture everything, from the mundane (transporting and assembling the table), to the spectacular (travelling to the depths of the Nevada desert). The campaign also benefits from Switzerland's wide diplomatic presence in the US. From East to West coast, Switzerland's offices are proactively using Facebook and other channels to drive the project forward and build relationships both off and online.

Not long after descending the Matterhorn, the Swiss Touch table travelled to New York City for an event on combatting terrorism. We then saw it move to the steps of the Lincoln Memorial for an 'Ask Anything' session with the Ambassador. Months later, it arrived on the banks of San Francisco Bay where stakeholders convened to discuss humanitarian protection in the digital age. Most recently, the Swiss Touch team arrived at Nevada's Seven Magic Mountains. These destinations could not be more removed from the Matterhorn. And this is precisely the point of the campaign; to introduce Switzerland's tradition and innovation to an entirely different landscape and audience.

Switzerland is no stranger to innovation and creativity. Lacking in natural resources, the country was transformed through enterprise, research, and knowledge. It makes sense to leverage this obvious strength as a public diplomacy tool.

One year into the campaign, Swiss Touch had visited six cities, hosted 17 events, invited 100 stakeholders to the table, and caused a digital stir.

Interestingly - and perhaps tellingly - Swiss Touch launched just three days before the inauguration of President Donald Trump. As Trump continues to espouse his "America First" agenda, dismissing the idea of cooperation, Switzerland's diplomatic community remains undeterred in their efforts to build relationships with Americans. Swiss Touch is an almost perfect symbol for opposing Trump's withdrawal from the international community, and a comforting message to Americans who still believe in globalisation and multilateralism.

Swiss Touch is by no means a small public diplomacy campaign. This is a large scale, resource heavy, labour intensive project. But the results speak for themselves. Swiss Touch has introduced the world to its wealth of creativity and innovation. It has brought to the fore many pressing global issues, and benefited from the combined expertise of two major nations. It has built an impressive network and following - both physical and online. And most importantly, it has demonstrated the power of digital in transforming a great campaign into something spectacular.

Swiss Touch is an almost perfect symbol for opposing Trump's withdrawal from the international community, and a comforting message to Americans who still believe in globalisation and multilateralism.



6.6

Soft power and the world's game:

The Premier League in Asia

Jonathan McClory

Portland

At a time when the prevailing political winds tack towards the negative, and far too much of public debate is focused on the things that divide rather than unite, the role of sport has never been a more important force for bringing people together. True, the popularity of given sports varies from country to country and region to region. But the truly global game is Football/Futbol/Calcio/Soccer/足球. Not only can sport be a uniting force, it can be used for positive change and to build positive links between people in different countries.

When looking at the professional leagues around the world, the (English) Premier League is widely regarded as the most popular league in the world. Its games are broadcast into one billion homes in 189 countries across 38 weeks of the year. But while live broadcasts of the Premier League mean fans around the world can see their teams on the screen of a TV, tablet, or smartphone every week, the League realised it needed to bring the live experience closer to its rising fan base and engage with its truly global audience.

The Premier League Asia Trophy does exactly that. As a biennial pre-season tournament played between Premier League teams, it brings the unique live experience of top-flight English football to fans in Asia. First held in Kuala Lumpur in 2003, the Premier League Asia Trophy has



Not only can sport be a uniting force, it can be used for positive change and to build positive links between people in different countries.

also been held in Bangkok, Beijing, and Singapore. Hong Kong hosted the most recent tournament in 2017, and it was the fourth time the city had played host, and the first played with four Premier League teams: Liverpool, Leicester City, West Bromwich Albion, and Crystal Palace. So high was the demand for tickets that all games sold out in 48 hours.

Yet, while the action on the pitch draws the headlines, the Asia Trophy is built around working with local clubs to deliver a range of activities that help the development of football in Hong Kong (or wherever the tournament is being hosted). The Premier League works with local Football Associations, as well as the Asian Football Confederation (the regional governing body), to run a range of events and programmes aimed at improving youth player development, coaching, and the quality of officiating.

During the 2017 programme in Hong Kong, the Premier League team on the ground ran a set of "Premier Skills" courses to help develop new youth football coaches, as well as working with the Hong Kong FA's elite referee training academy, all with a focus of encouraging more women into football.

Premier Skills is the Premier League's lead international development programme, run for the past eleven years in partnership with the British Council and a range of different sporting, government, and non-government bodies. The Premier Skills programme has had huge impact, training more than 20,000 men and women as coaches and referees across 29 countries, all of whom have gone on to work with over 1.5 million young people.



Alongside Premier Skills, the Asia Trophy incorporated an international conference held with the Asian Football Confederation (AFC), focusing on best practice in "Social Development through Football". Representatives from the AFC's 47 member associations were invited to attend and take part.

The event fell under the Premier League's Mutual Cooperation Agreement with the AFC. The UK Government's GREAT Campaign also recognised the conference as supporting UK's wider international engagement efforts. The conference had a focus on both football and social development. Topics included building a fan base through education, youth development, encouraging players to consider social responsibility, female participation, fostering new philanthropic initiatives, and running disability football programmes.

Importantly, the player, coach, and referee development programmes that ran in conjunction with the Asia Trophy, did so over the course of weeks, not days. They started well before and lasted after the tournament itself. The aim of these programmes is to build lasting relationships and help deliver a sustainable positive impact for youth football in Asia.

In the totality of its scope, the Asia Trophy delivers both a major public-facing event for football fans, and makes a meaningful contribution to the future of football in Asia. Doing so has a major positive impact on the overall perceptions of the UK itself. Said differently, the Asia Trophy has been good for British soft power. This is not based on anecdotal evidence.



Research findings support the notion that not only is the Premier League seen as an important British brand, but it also makes a positive impact on how international audiences think about the UK.

but is illustrated in a study based on international polling data published by Populus, the research firm.

The British Icon Index looks at how "iconic" British brands – companies and institutions like the BBC, British Universities, Jaguar Land Rover, Rolls Royce, and the Premier League – compare across key markets. The study surveys nationally representative samples from ten markets across Asia, the Middle East, Africa, and North America.

Compared against fourteen other brands, the Premier League comes top of the British brand league table. One of the stand out figures from the polling data is that 84 per cent of followers of the League say that they think more positively of the UK as a result of it, with this rising to 90 per cent among both young and affluent survey respondents.

The research findings support the notion that not only is the Premier League seen as an important British brand, but it also makes a positive impact on how international audiences think about the UK. Essentially, the research shows that the Premier League is an important contributing resource of British soft power.

The Asia Trophy holds lessons for other countries looking to engage with global audiences through sport. The Premier League has worked effectively with British diplomatic missions in Asia to help deliver the more long-term social and sports

development elements of the Asia Trophy. Importantly, the British government's involvement has not been too heavy-handed, which can undermine the soft power potential of such initiatives. But where governments can help provide a platform or make links for popular brands and institutions abroad, it should seek to do so.

Sport, as a uniting force – and football the global sport – provides the perfect vehicle for bringing people together across borders, cultures, and languages. If governments – and sports organisations – can leverage it properly, such events can make a real impact in building better links between countries and changing international perceptions for the better. As The Soft Power 30 – and indeed the British Icons Index – can attest, the English Premier League is clearly a boon for British soft power.

6.7

Public diplomacy and the decline of liberal democracy

Vivian S. Walker

USC Center on Public Diplomacy

In the good old days we worried about carrying out effective public diplomacy in patently authoritarian, newly independent, or conflict ridden states. We had a well-established set of public diplomacy practices to lay the groundwork for democratic institution building, featuring principles of tolerance, transparency, and freedom of expression. We were on an upward trajectory toward widespread democratic rule.

Not anymore. Today, in academic and policy communities, there is widespread concern about what appears to be a global decline of liberal democracy.¹⁰ What do you do when established democracies veer toward authoritarianism? When democratically elected leaders and their governments disparage liberal values in defence of national security and prosperity, political sovereignty, and the preservation of national identity? How does public diplomacy promote the seemingly devalued principles of tolerance, transparency, and free expression?

As we struggle to manage the widening gap between values and actions in our own country, we must also keep track of public diplomacy challenges elsewhere. Take Hungary, for example, a country that endured centuries of occupation and incursion, bloody wars and ill-fated revolutions, to emerge as a strong Central European democracy,

a trusted NATO ally, and an EU member state. Today, it is on the verge of becoming a cautionary tale about the decline of liberalism—and the fragility of democratic values.

In 1989, as a young firebrand politician, Viktor Orbán emerged as a champion of liberal democracy, calling for an end to communist rule and Hungary's triumphant return to the West. Today, Prime Minister Orbán, elected to his third straight term of office in April 2018, has morphed into a hardline authoritarian. As the self-proclaimed prophet of "illiberal liberalism," he and his fellow Fidesz party members have steadily eroded Hungary's hard won democratic freedoms.

Public diplomacy has the unique power to inform and influence, to shape the way in which publics perceive and respond to their rights and responsibilities as citizens. However, in order to confront authoritarian tendencies, public diplomacy practitioners must change the operational paradigm.

Citing Russia, China, and Turkey as political models, Orbán has been busy squeezing out independent media, launching repressive measures against ethnic minorities and refugees, and amending the constitution to limit judicial authorities. Much like Putin and the restoration of a so called "Greater Russia," Orbán appears to be fixated on a vision of Hungary as a bastion of traditional values and a model of homogenous ethnic cohesion. In pursuit of this vision, Orbán has vilified Hungarian-American financier and philanthropist George Soros, describing his sponsorship

of numerous democracy-promoting initiatives in Hungary as corrupt, destabilising, and even "evil". The Orbán government has also launched efforts to weaken and delegitimise academic, human rights, and independent media organisations associated with Soros.

The public diplomacy implications of these developments are significant. An independent judiciary, robust media, and widely representative civil society institutions provide the conditions necessary for vigorous public debate about government policies and actions. And public diplomacy initiatives provide a platform to manage these exchanges, which are vital to the health of a democracy.

But when the courts, the press, human rights organisations, and educational institutions are either co-opted, targeted, or marginalised, then it is very hard indeed to make the case for a state's viability as a democracy—or even to make the case for democracy itself.



Can public diplomacy help to mitigate the decline of liberal democracy? I think so. As an instrument of policy, public diplomacy has the unique power to inform and influence, to shape the way in which publics perceive and respond to their rights and responsibilities as citizens. However, in order to confront authoritarian tendencies, public diplomacy practitioners must change the operational paradigm.

First, public diplomacy initiatives should channel what Walter R. Meade recently called the “creative disorder of a free society.” The democratic process can be messy and argumentative. It should be portrayed that way. Too often we project a vision of democracy as a neatly derived set of rules and regulations that, when followed, are guaranteed to produce positive results. In reality, democratic institutions emerge from a scrum of interests, ideas, and aspirations. Rather than focusing on a single, exceptional model, it is now time for public diplomacy programs to promote an understanding of democracy that truly embraces a range of histories, cultures, values, and national identities. The embrace of multiple viewpoints is the best defence against authoritarianism.

Next, systematic efforts by authoritarian states to delegitimise democratic institutions in defence of their own interests have contributed significantly to the rise of “illiberalism.” Consider, for example, Russia’s consistent efforts to discredit Ukraine’s fragile hold on democracy through a brutal distortion of the facts about its history and culture. Public diplomacy initiatives can combat disinformation, misinformation, and censorship through the promotion of transparency: open access to information, support for assessment of source credibility and the spread of media literacy. Public diplomacy programs can also help to counter authoritarian influence through the promotion of frank public dialogue about prevailing political and economic challenges.

The sheer volume of accessible information, and the speed at which it travels, requires a new way of thinking about the relationship between purveyors and consumers of information. To combat authoritarian narratives,

public diplomacy must also get in sync with game-changing information technologies. And by that I don't mean another shop-worn call for more and better official use of social media. We need to come up with more accurate tools to assess audience interests and beliefs in order to have any hope of influencing their decision-making processes. We must also build in a higher level of responsiveness to audience demand for information about and explanations for official policies and actions. That includes the decentralisation of onerous clearance processes and increased autonomy for public diplomacy practitioners in the field.

Finally, in this season of democratic decline, it is time to develop a more nuanced promotion of our national values. Too often public diplomacy advocacy and influence programs default to the projection of ethical and moral principles that simply do not resonate with target audiences. We are so busy figuring out what matters to us as a nation that we fail to focus on the values that matter to those we need to engage.

Take the concept of tolerance. We Americans define it very broadly, embracing everything from gender equality and recognition of sexual preference to ethnic and religious diversity. But, in more conservative societies, prevailing cultural and religious attitudes may render these values confusing at best and threatening at worst. To promote basic principles of tolerance, we must develop a narrative sufficiently attuned to those whose history, culture, and experience may not yet permit the embrace of more liberal viewpoints.

It is time to step up public diplomacy support for advocates of liberal democracy around the world. That does not mean yet another well-rehearsed promotion of what makes democracy great. Rather, it means an embrace of all the ways in which democracy challenges, and through challenging, protects and upholds basic human rights—via the courts, the press, human rights organisations, and educational institutions.

This approach requires the acknowledgement that democracy is imperfect, that transparency begins with source accountability, that information power is better shared than controlled, and that the transmission of values is subject to cultural, historical, and political norms. The downward trajectory of liberal democracy demands more than soul-searching to arrest and reverse the trend. Let's get to work.

¹ See, for example, the collection of articles exploring the decline of democratic liberalism in "Is Democracy Dying? A Global Report," *Foreign Affairs*, May/June 2018: <https://www.foreignaffairs.com/events/2018-05-21/foreign-affairs-mayjune-issue-launch-democracy-dying-global-report>

6.8

Fighting back: fake news, disinformation, and the question of sharp power

Max Kellett and Justin Kerr-Stevens

Portland

The diverging use of soft power-like tactics by authoritarian states in pursuit of objectives has necessitated a new terminology and theoretical framework. The term "sharp power", initially outlined by Christopher Walker and Jessica Ludwig, was coined to describe an approach that supports the projection of influence abroad (the same goal as soft power), through the use of "outward-facing censorship, manipulation and distraction."¹

One of sharp power's primary characteristics is the use of information warfare tactics to influence foreign citizens. The intended outcomes of this activity are clear: to introduce a level of doubt and uncertainty around official narratives for political gain. Usually building on established prejudices or fears, disinformation campaigns are now apparent in conflict zones, sovereign election processes, and in geopolitical hotspots around the world.

While the extent to which this activity influences political outcomes is unclear, one unarguable impact has been increasing confusion among policy makers, media, and the general public about how to identify and counter such activity when it appears.

Doing so – in both political and corporate environments – has grown increasingly difficult. This is because the number of actors has rapidly

Confusion around terminology has also played its part. "Fake news", "disinformation", and "misinformation" are interchangeably used by media and politicians alike, creating an ever more disconcerting information environment.

multiplied as the barriers to entry around the planning, producing, and dissemination of malicious content have dropped.

Emerging technologies and changing media consumption habits mean that non-state actors are now just as capable of implementing disinformation campaigns as state intelligence agencies. The plausible deniability afforded to independent actors has become a hallmark of contemporary hybrid warfare and stymie attempts to combat this activity through traditional multilateral frameworks.

Confusion around terminology has also played its part. "Fake news", "disinformation" and "misinformation" are interchangeably used by media and politicians alike, creating an ever more disconcerting information environment.

The terms have even become weaponised to deflect remotely critical comments, a tactic sadly seized upon by some political leaders.

So in this rapidly evolving context, how can governments, corporations, and individuals identify and counter these tactics? Portland has developed a process that is built upon hard-won experience, media literacy, and a belief in simplicity over complexity.



Identify:

To challenge disinformation, it must first be identified. A variety of free tools have sprung up in recent years that allow for in-depth searching of the surface and deep web, and social media. Effective searching and monitoring of social, online, and traditional media allows for the rapid flagging of suspicious or malicious activity.

Analyse:

Once identified, threats must be properly analysed. The objectives at this stage are to either:

- Establish that the claims being made are false;
- Or to disassemble the arguments through critical analysis.

Modern open-source intelligence techniques have increased the ability of untrained parties to analyse information. Falsehoods can be identified and disproved relatively quickly; often through the help of research collectives such as Bellingcat. In cases where facts are being misrepresented or alternative narratives being advanced, critical analysis of the arguments and logic contained within pieces then provides the structure for effective responses.

Categorise:

Categorisation of disinformation allows analysts to assess the many differing varieties of disinformation based on its characteristics. This serves to establish the intention and motives behind disinformation; a vital requirement when looking to build an effective response. This stage of the process also helps to determine whether falsehoods are deliberate or merely the result of poor reporting.

Respond:

Once this process has been completed the question then remains: how to counter?

The answer is nuanced. Often disinformation campaigns gain little traction, their ambitions being too obvious or ridiculous to fool their intended audience. In this case they often do not warrant the investment of a full-scale response.

In cases where a narrative has gained traction, or represents a clear reputational threat, it is vital that responses are carefully tailored using the insights gained from the analysis and categorisation stages.



A fact-based approach that highlighted the weak points in disinformation efforts by debunking false narratives was used to good effect by the British government during the Skripal poisoning case. While the collaborative approach taken by governments in Europe ahead of the French presidential election in 2017 worked well to pre-empt potential lines of attack, thereby building public resilience.

Counter narratives, carefully cultivated to challenge prevailing belief systems can also be effective at delivering positive outcomes. The impact of the Global Coalition's efforts to combat the spread of ISIL propaganda drew upon forensic knowledge of the drivers of extremism and the falsehoods contained within the disinformation spread by the group to present compelling alternatives.

In all cases, media literacy and strong critical analysis capabilities are essential in the development of an effective response. The reply should expose the falsehoods and logical fallacies while presenting the truth in a more compelling and authoritative manner.

Targeting and speed are also vital factors. The response must reach those who have been impacted, or are likely to be impacted by its spread before it has been able to take hold and become a dominant narrative.

Although this process provides an effective framework for countering today's disinformation, it is imperative that those likely to be impacted pay close attention to the emerging technologies on the horizon.



Soft power still remains the most effective way of cultivating global influence, however the introduction of sharp power theory to the field of international relations has illustrated how quickly seemingly benign concepts and tactics can be leveraged for malicious, unilateral gain.

AI, ad-tech, next-gen facial and voice manipulation software, and decentralised computing will all change the way in which users access information, as well as providing malicious actors a host of new ways in which to produce disinformation designed to influence.²

These changes will allow for a much greater level of intricacy when it comes to the creation and dissemination of disinformation, and will therefore require an increasing level of technological skill to counter.

Soft power still remains the most effective way of cultivating global influence, however the introduction of sharp power theory to the field of international relations has illustrated how quickly seemingly benign concepts and tactics can be leveraged for malicious, unilateral gain.

Governments that fear their population could be targeted need to be vigilant against the use of sharp power tactics. Ironically, those states that tend to cultivate and utilise soft power, are often the ones susceptible to sharp power. They need to be prepared to counter forcefully when disinformation and sharp power tactics threaten the very systems and institutions on which their soft power is built.

¹ Christopher Walker and Jessica Ludwig, 2017, From Soft Power to Sharp Power: Rising authoritarian influence in the democratic world, National Endowment for Democracy, International Forum for Democratic

² Foreign Policy/Chris Meserole & Alina Polyakova, 2018. Disinformation Wars. [ONLINE] Available at: <http://foreignpolicy.com/2018/05/25/disinformation-wars/>. [Accessed 27 June 2018].



6.9

Hard laws, soft power

Philip Hall

Portland

Your country's legal system holds a lot of power over you and your fellow citizens. No surprises there. Every day, people make and break deals, and then face the hard consequences – all under the watchful gaze of their local rule of law.

More surprising is the power that the courts of England and Wales have accrued to pass judgment on the dealings of citizens from other countries.

From Angola to Zimbabwe, people choose to have their dispute heard in London's Commercial Courts. This is due in part to the Courts' long-standing reputation for independence, fairness, and consistency. A deal struck thousands of miles away from the Royal Courts of Justice will often stipulate that any issues are resolved back in London, under English law.

This is a solid example of soft power. It is also a powerful advantage for the UK. Its courts are, in a sense, setting the rules that others have to play by. They are also supporting a lucrative source of business for City law firms.

But as power centres shift across the globe – and as Brexit edges ever closer – does the UK risk losing this soft power advantage?



A challenge to English law

The English legal system is arguably one of the UK's most successful exports. Sir Roger Gifford, the 685th Lord Mayor of London, told a UK Parliamentary Select Committee on soft power that the UK's legal tradition has "produced an international contract law that is essentially English law and is viewed the world over as a gold standard".

The same committee also noted that the English common law system had been exported to many countries, including across the Commonwealth, meaning that the UK's influence is "deeply embedded into a number of national constitutions".

Portland's annual Commercial Courts Report found that in 2017/18, London remained a destination of choice for litigants from around the world, with 69 countries represented. This tally maintained a steady upward trend. In 2015/16 and 2016/17, there were 62 and 66 countries represented respectively. In all three years, much of the overall growth came from an increase in litigants from Asia and Europe.

London cannot, however, take this position of power for granted.

Businesses are increasingly operating across multiple countries, carving out new trade routes and regional markets. As they do so, the demand for international commercial courts to serve them has grown. The supply of court services from across the globe has risen to meet this.

The courts most frequently mentioned as potential competitors to London include the Dubai International Financial Centre Courts (DIFC), the Qatar International Court (QIC),





the Abu Dhabi Global Market Courts (ADGMC) and the Singapore International Commercial Court (SICC).

Singapore in particular has been used as a model court for other jurisdictions seeking to establish themselves as international legal hubs. China, for example, has announced the opening of commercial courts similar to the SICC to manage disputes arising from the Silk Road trade route, as part of its "One Belt, One Road" initiative.

Dubai meanwhile is well established as a regional trade hub and is attracting an increasing number of international litigants, with a notable focus on Africa.

The London Commercial Courts also face a potential challenge closer to home, following the Brexit referendum. If following a so-called "hard-Brexit", the Recast Brussels I Regulation is not kept, rulings made in the London Commercial Courts will no longer be enforceable in the European Union. This could in turn make London a less attractive litigation destination. Litigants may look to other European Union courts for relief.

It is notable that five European cities – Paris, Dublin, Amsterdam, Brussels, and Frankfurt – have announced the launch of, or increased funding for, English-speaking courts with common law features. The potential reward for these countries is high: the London Commercial Courts saw a record number of litigants from EU 27 countries in 2017/8 – 105 in total.

The ability to build networks is the new foundation of global power. When litigants – and their businesses – choose regional hubs like Singapore or Dubai, they help reinforce new and growing global networks. In the same vein, European countries' eagerness to fill the potential legal cracks created by Brexit may stem from their desire to improve their regional and international soft power among EU nations.

Soft power is in large part about setting the rules and norms for others to act by or aspire to. But it is also about the ability to disrupt the established international order. London's history as a global legal centre is a considerable source of influence. This does not mean it is set in stone.

7.0

Conclusion and look ahead

7.1

Trends and lessons

7.2

Going forward

From the outset of this series, the purpose of The Soft Power 30 research project has been to develop a practical analytical framework to measure and compare the soft power resources of the world's leading nations. Alongside this, we wanted to create an annual publication that could delve into the various topics around soft power, both in terms of what the changing geopolitical context means for soft power, but also to explore practical issues around how soft power is understood, measured, and leveraged.

In previous reports, we have argued that the ability to leverage soft power effectively would continue to grow in importance. In making these arguments, we have primarily been concerned with the foreign policy – and even economic development – strategies and tactics of individual countries, as they relate to the use of soft power. However, given the changes in global politics over the last year, the importance of soft power has taken on an unexpected new dimension. As the liberal international order enters a phase of decided uncertainty at best, and outright crisis at worst, soft power will be critical in holding the order together in the short term, and finding solutions to renewing and reforming it to ensure its survival in the long term. Perhaps what is most needed now in the discussion around soft power is to refocus attention on the core concerns of global affairs, none of which is more pressing than the state of the global order.

One need only scan the covers of current affairs periodicals, foreign policy journals, and newspaper headlines to get a sense of the deep concern world leaders, analysts, and commentators have for the future of the liberal international order. While shifting global power dynamics and the rise of populist protectionism are both threats to the liberal international order, it is the radical shift in US foreign policy that has generated the lion's share of concern and column inches. The reality of the current situation is that American foreign policy now rejects the US' traditional global role as the preeminent champion of the liberal international order. This was seen in one of the most striking moments of the June 2018 G7 Summit in Canada, when the US delegation reportedly objected to the inclusion of the line "the rules-based international order" in the summit's final communiqué. Eventually, "a" rules-based international order was deemed acceptable and included in the final statement. Though President Trump ultimately rejected the final draft following his departure from the summit.



A few days after the G7 meeting, German Foreign Minister, Heiko Maas, gave a speech that was unequivocal in its assessment of how many of America's strongest allies see the current direction of US foreign policy. The Trump administration's "America First" doctrine was grouped in with the threats posed by a rising China and "Russia's attacks on international law and state sovereignty" as challenges to be managed. That a major NATO ally would have to set out a harm-reduction strategy to "manage" its relationship with the US would have been unthinkable 24 months ago. Mr. Maas went so far as to say that the "world order that we once knew...no longer exists".

While this is only one speech from the foreign minister of one country, it illustrates how much has changed over the last year, and the extent to which the future of the international order is in doubt. In what feels like uncharted waters (at least for the generation currently charged with developing and executing foreign policy), soft power is all the more important for those leading nations that remain invested in the liberal international order.

As a result, there is a greater need to understand how soft power is derived and what resources a country can call on. While the real value of The Soft Power 30 lies in the insights to be gained from breaking down the performance of individual countries, the overall results of the index point to some interesting trends and lessons that may help foreign policy makers better grasp the rapidly shifting geopolitical context and inform their thinking on how to respond accordingly.



7.1

Trends and lessons

With a dataset of four years to compare, we can look at emerging trends in the global distribution of soft power and track changes going back to 2015. With each additional year of data, our ability to analyse and predict trends continues to improve. Comparing datasets, we can test emerging trends and also highlight a few overarching lessons.

Starting at the top of The Soft Power 30 table, the first trend is a confirmation that the UK has yet to lose its soft power lustre. In the four years of Soft Power 30 results, the UK has ranked first (2015), second (2016), second (2017), and first again (2018). The UK's first place finish this year will undoubtedly raise some eyebrows in European capitals – and probably a few others farther afield. After Prime Minister Theresa May gambled her party's majority on early elections in June 2017 and lost, the government has not quite lived up to its strong and stable billing. The recent Windrush scandal – which saw legal UK residents of Caribbean heritage forcibly deported to countries to which they had never been – came to a head just as London was hosting the Commonwealth Heads of Government Summit. The diplomatic choreography of the entire incident could not have gone worse and visiting Caribbean heads of government were certainly left unimpressed.

But overshadowing the political gaffs and missteps over the last year, no other issue dominates Westminster like Brexit. The handling of the negotiations has been criticised by remain and leave supporters alike, and there is a growing sense that the UK is headed for a worst-of-all-worlds style compromise. None of this sounds conducive to taking the top spot in The Soft Power 30; however, three factors ultimately paved the way to the UK's first place finish for 2018.

First, the UK remains – at least for eight more months – a fully paid-up member of the European Union. Thus, nothing – at least as measured by the objective data – has changed for the UK's soft power with respect to the European Union. Should Brexit be delivered in March 2019, and the UK leaves the EU and related multilateral institutions, then there will be a measurable and negative impact on the UK's soft power, as assessed by metrics in the Engagement sub-index. For now, however, nothing has changed. How Brexit is ultimately delivered, and what that means for global perceptions of the UK, is still very much an unknown.

Second, while there is plenty with which to find fault in the current stewardship of the British state, the bulk of the UK's soft power resources exist independently of HM Government. And, looking beyond the turbulence of British politics and Brexit negotiations, the UK commands a remarkably well-balanced set of soft power assets.



Third, the move towards Brexit has yet to significantly impact the UK's performance in the international polling data. Indeed, following a dip in its polling scores from 2016 to 2017, perceptions of the UK have rebounded with the UK ranking sixth overall in the polling. This is the best British performance in the polling since 2016 (taken before the EU referendum), when it ranked fifth, and is actually better than its 2015 polling rank of seventh. Moreover, the UK still has impressive diplomatic muscles to flex. The UK's efforts in marshalling the largest coordinated expulsion of Russian diplomats since the Cold War following the Sergei Skripal poisoning was a clear reminder that HMS Britannia can still make global waves, even if it no longer rules them.

While the 2018 results should be seen as good news for the UK, it is difficult to see this run of form continue into 2019. With a hard – or even a soft – Brexit, it is inescapable that the UK's influence in the world will be diminished. To stave off the real threat that Brexit holds for Britain's global reputation and influence, the UK's foreign policy leadership needs a plan of action fast. The much-touted, but still hollow, "Global Britain" rallying cry desperately needs flesh on its bones. If the UK is to hang on to its relevance and maintain its position as a leading soft power, it will need to find a defining purpose that resonates with the global community. Given the concern that has gripped Western allies, taking a leading role in shoring up the liberal international order would be a bold undertaking for the birthplace of liberalism itself, and suitably befitting of the "Global Britain" moniker.

Looking across the English Channel to Europe, the second trend is the EU's relative soft power improving, as it builds on gains from 2017. Last year's data showed a clear reversal from the 2016 trend of a Europe in relative soft power decline. This year, about half of the European countries in the top 30 moved up from their 2017 ranking, while a little over a third held their position, and just under one fifth fell back from their 2017 position. However, there is no shortage of challenges facing Europe. There is political uncertainty within EU member states, most notably in Italy, Spain, Greece, as well as the slide of the Visegrád states towards illiberalism. However, in soft power terms, Europe has built on its 2017 momentum.

There is undoubtedly an ideological split emerging within the EU, as some states move towards populist-nationalism and others stay the course of liberalism. It is hard to know how this will play out over the long term. However, the two largest and most influential EU-27 states, France and Germany, are clearly working to keep the liberal international order ticking over. The continuation of that work will be critical if the future of the global order is to be one that encourages and rewards effective collaboration.

Turning to the US, we see the confirmation of a third trend. The 2018 results show another year-on-year drop in America's soft power ranking. Last year, we posited that the pursuit of the narrow interests defined by "America First" would have negative consequences for US soft power. While the fall from third to fourth place is

perhaps not the steep slide some might expect, it does indicate that there is a cost to pursuing the priorities, strategies, and tactics of the current administration.

Looking to 2019, it is hard to see the US reversing this downward trend. Owing to timing, the international polling undertaken for this study does not reflect the US decision to pull out of the Iran deal, the June G7 summit that collapsed in acrimony, or the start of a trade war with Canada, Mexico, and the EU. Moreover, the polling will have missed the uncovering of forced family separations (and child detention) for asylum seekers at the US southern border. The images, stories, and video clips capturing the emotional and psychological trauma experienced by innocent children and toddlers is unlikely to play out positively in the court of global public opinion. Even accounting for a possible diplomatic dividend from the historic Trump-Kim summit, there is little evidence to suggest that America's global image – or its soft power – will be improved in twelve months' time.

Crossing the Pacific, the fourth trend is one that emerged in last year's Soft Power 30: the continued rise of Asia. In the top 30, the picture is mixed this year. The four Asian countries included in The Soft Power 30 returned a split performance. Japan and South Korea moved up in the rankings, though Singapore slid one spot, from 20th to 21st, and China fell two spots from 25th to 27th. However, comparing the 2015 and 2018 results, Asia made significant gains. Japan has moved up from eighth to fifth; China from 30th to 27th; and Singapore and South Korea both finish 2018 exactly where they were in 2015 at 21st and 20th respectively.

Japan breaking into this year's top five is a genuine milestone for Asian soft power. South Korea moving up on the back of a successfully hosted Winter Olympics that contained more diplomatic drama than any such sporting event since the Cold War is also a positive. If the tensions on the Korean peninsula continue to relax, this will likely pay wider soft power dividends for East Asia as a whole going forward.

China, however, is a more complicated story. The world's largest country by population – and soon to be by GDP – is in a better place with respect to its relative soft power compared to 2015. However, the fall from its 2017 high of 25th to 27th shows that China's path to soft power development is not so straightforward. There are systemic factors that will continue to hold China back. These factors include a closed political system, lack of a dynamic civil society, and the concerns generated by the militarisation of the South China Sea. The challenge for China is that – for the foreseeable future – these factors will continue to constrain the development of the Middle Kingdom's soft power.

Beyond the trends that come into sharper relief with the addition of 2018 data, three wider lessons can be taken away from this year's index. The first lesson is that changes in the relative distribution of global soft power are slow to materialise. Each year's Soft Power 30 produces a different set of rankings, but the changes from year to year are almost always incremental. Significant movement between consecutive years is rare. While 2018 has given us the first change to the top five countries; the group comprising the top ten has been the same across

Looking back to 2015, when we launched the inaugural Soft Power 30, much of the discussion around soft power was expanding into areas beyond traditional foreign policy. Under what were then considerably calmer geopolitical skies, this is understandable. Investment and export promotion bodies, private sector companies, and tourism ministries around the world were thinking about how soft power could be harnessed to generate economic returns. There is, of course, nothing wrong with this, and being an admired country correlates with higher levels of foreign investment and tourism. But in the context of such fundamental geopolitical change and uncertainty around the global order that we see today, it is perhaps time to refocus soft power debates and return it to its roots: international relations and foreign policy. Those leading nations that remain committed to upholding the rules-based international order have a major task ahead of them in securing it. Soft power will be an invaluable tool in their efforts to maintain and eventually reform the global order. The sources of soft power are extremely diverse. But in considering how and why it is ultimately deployed, perhaps it is time to narrow our focus and concentrate on the most pressing task at hand.





Give cyclists space



Gulliver's

8.0

Appendix

8.1

Appendix A – Metrics

8.2

Appendix B – References

8.1 Appendix A – Metrics

| Sub-Index | Metric | Data Source |
|----------------|--|---|
| Culture | | |
| | Total number of tourist arrivals | UN World Tourism Organisation |
| | Average spend per tourist (total tourism receipts divided by number of tourists) | UN World Tourism Organisation |
| | Number of films appearing in major film festivals | Various |
| | Number of foreign correspondents in the country | Gorkana Media Database / Foreign Correspondent Associations / Various |
| | Number of UNESCO World Heritage sites | UNESCO Statistics |
| | Annual museum attendance of global top 100 | The Art Newspaper Review Number 289, April 2018 |
| | Size of music market | IFPI Global Music Report 2018 |
| | Number of top 10 albums in foreign countries | IFPI Global Music Report 2018 |
| | Olympic medals (Summer 2016 / Winter 2018) | International Olympic Committee |
| | FIFA Ranking (Men's) | FIFA/Coca Cola World Rankings |
| | Quality of national air carrier | Skytrax Arline Equality Review |
| | Michelin starred restaurants | Michelin guide |
| | Power Language Index (PLI) | Chan, K., Power Language Index, 2016 |
| Digital | | |
| | Facebook followers for heads of state (outside of country) | Facebook |
| | Facebook engagement score for heads of state or government (outside of country) | Facebook |
| | Facebook followers for ministry of foreign affairs (outside of country) | Facebook |
| | Facebook engagement score for ministry of foreign affairs (outside of country) | Facebook |
| | Number of internet users per 100 inhabitants | World Bank |
| | Secure internet servers per 1 million people | World Bank |
| | Mobile phones per 100 people | International Telecommunication Union |
| | Internet bandwidth (thousands Mpbs) | International Telecommunication Union |
| | Government Online Services Index | United Nations E-Government Survey |
| | E-participation Index | Web Index |
| | Fixed broadband subscriptions per 100 people | World Bank |

Education

| | |
|--|----------------------------------|
| Average of OECD PISA science, maths and reading scores | OECD |
| Gross tertiary educational enrolment rate | Pupil to Teacher Ratio |
| Number of top global universities | Times Higher Education (top 200) |
| Number of academic science journal articles published | World Bank |
| Number of international students in the country | UNESCO Institute for Statistics |
| Spending on education as percentage of GDP | World Bank |

Engagement

| | |
|--|--|
| Total overseas development aid | OECD |
| Overseas development aid / GNI | OECD |
| Number of embassies abroad | Lowy Institute / Embassypages / Various |
| Number of embassies in the country | Embassypages |
| Number of consulates general abroad | Lowy Institute / Embassypages / Various |
| Number of permanent missions to multilateral organisations | Lowy Institute / Various |
| Membership of international organisations | Various |
| Asylum seekers per 1,000 people | World Bank / Asylum Seeker Resource Centre |
| Number of diplomatic cultural missions | Various |
| Number of countries a citizen can visit visa-free | Henley & Partners Visa Restrictions Index 2016 |
| Size of weekly audience of state broadcaster | Various |
| Environmental Performance Index (EPI) | Yale Center for Environmental Law & Policy (YCELP) |

Enterprise

| | |
|---|--|
| Global patents filed (percentage of GDP) | World Intellectual Property Organization / World Bank |
| WEF Competitiveness Index | World Economic Forum |
| Foreign direct investment as percentage of GDP | United Nations Conference on Trade and Development Statistics / World Bank / Various |
| Heritage Economic Freedom Index score | 2017 Index of Economic Freedom |
| Corruption Perceptions Index score | Transparency International Corruption Perceptions Index 2016 |
| R&D spending as percentage of GDP | World Bank |
| Global Innovation Index score | The Global Innovation Index 2016 |
| Global Talent | Global Talent Competitiveness Index |
| World Bank Ease of Doing Business Report | World Bank |
| Unemployment rate as a percentage of labour force | World Bank |

| | |
|--|------------|
| Hi-tech exports as percentage of manufactured exports | World Bank |
| Log of business start-up costs as percentage of GNI per capita | World Bank |

Government

| | |
|--|--|
| Human Development Index score | UNDP Human Development Report |
| Freedom House Index score | Freedom House |
| Number of think tanks in the country | McGann, J. (2017), 2016 Global Go to Think Tank Index Report |
| Gender Equality Index score | UNDP Human Development Report |
| Economist Democracy Index score | Economist Intelligence Unit |
| Size of shadow economy as percentage of GDP | Hassan, M & Schneider, F (2016), Size and Development of the Shadow Economies of 157 Countries Worldwide: Updated and New Measures from 1999 to 2013 |
| Homicides per capita | World Bank |
| World Bank Voice and Accountability Index score | World Bank |
| Capital punishment carried out in 2016 | Amnesty International |
| Income inequality - gini coefficient | World Bank |
| World Economic Forum Trust in Government Index score | World Economic Forum |
| Press Freedom Index score | Reporters Without Borders |
| World Bank Government Effectiveness score | World Bank |
| World Bank Good Governance Regulation Quality score | World Bank |
| World Bank Good Governance Rule of Law score | World Bank |
| Population well-being | World Happiness Report, United Nations |

Polling

| | |
|---|-----------------------|
| Cuisine | International polling |
| Welcoming to tourists | International polling |
| Technology products | International polling |
| Luxury goods | International polling |
| Trust to do the right thing in global affairs | International polling |
| Appeal as a place to visit, work, or study | International polling |
| Contribution to global culture | International polling |

8.2

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