Soft Power at a Turning Point

Stuart MacDonald, Andrew Murray

Suggested citation:

MacDonald, Stuart, & Murray, Andrew. (2024). *Soft Power at a Turning Point*. British Council. https://doi.org/10.57884/0f7h-yd62

Abstract

The competition for influence is getting ever fiercer with both friendly rivals and hostile competitors investing in and innovating how they build trust and attractiveness internationally. The aims of cultural relations, as drivers of international development, peacebuilding, and bridges of communication during difficult times in international relations, are more important than ever.

This research considers the soft power and cultural relations policies, approaches and institutions of Brazil, Canada, China, France, Germany, India, Italy, Japan, Kingdom of Saudi Arabia, Portugal, Republic of Korea, Russia, Spain, Türkiye, UAE, UK, USA and the EU.

BRITISH COUNCIL

Research

Soft Power at a Turning Point

A comparative analysis

www.britishcouncil.org/research-insight

Acknowledgements

This report was commissioned by the British Council from ICR Research Ltd, London.

The ICR Research team was Stuart MacDonald, FRSA, Dr Andrew Murray, and Ziling Yang (University of Warwick). The authors are grateful to Dr Benjamin Bach of the University of Edinburgh for the visualisations.

The British Council team was Mona Lotten and Alistair MacDonald. The research was carried out between January and March 2024.

The interpretations offered in this report are those of the authors and do not necessarily represent the views of the British Council or its officers. Similarly, the authors take full responsibility for any errors.

Lead authors: Stuart MacDonald FRSA and Dr Andrew Murray

ICR Research Limited

ICR Research

This research was commissioned by the British Council and authored by ICR Research Ltd.

The views expressed in this research do not necessarily represent those of the British Council and are the researcher's own, developed through co-commissioned research.

Papers in this series may represent preliminary or on-going work, circulated to promote discussion and comment. Citation and use of its content should therefore take account of its provisional nature.

To receive publications in alternative formats or to request a hard copy, please contact: researchglobal@britishcouncil.org

ISBN: 978-1-915280-46-6

DOI: https://doi.org/10.57884/0f7h-yd62

Citation:
MacDonald, S., & Murray, A. (2024). Soft Power at a Turning Point A comparative analysis. British Council. doi.org/10.57884/0F7H-YD62

The British Council is the United Kingdom's international organisation for cultural relations and educational opportunities

Contents

Executive summary

This report provides a comparative analysis of the British Council and its international counterparts that engage in 'soft power' activities such as cultural diplomacy and public diplomacy. The aim is to understand how these organisations operate within their respective policy frameworks, how the frameworks are evolving, and the implications for the British Council.

Our headline finding is that in 2024, countries are increasingly prioritising national interests over multilateralism and the global order. There is more alignment of soft power activities with foreign and economic policy goals, and less emphasis on shared global challenges. Domestic considerations are also more prominent, with a focus on demonstrating benefits to higher education and creative sectors.

Emerging trends in soft power:

- ‘Soft power’ policies and programmes are more explicitly related to national foreign policy priorities and national interests than in the past.
- Similarly, ‘soft power’ is increasingly linked to economic policy and goals.
- There is an increase in activity designed to appeal to domestic audiences: delivering benefits at home and making the case for international engagement.
- Soft power is increasingly being mobilised to promote national identities, sometimes assertively or controversially.
- These shifts are reflected in moves towards greater national policy and strategy co-ordination (although there is a lag between policy shifts and implementation).
- It can also be seen in more control being exerted by governments over arm's length bodies like the British Council.

Resource levels:

- **Decreases** in state support in some, mostly Western, countries including UK: some £6m between 2023 and 2024 for the Goethe-Institut, a reduction in Japan’s Public Diplomacy budget between 2022 and 2023 of some £60m, and reduced real terms estimates for the US State Department for 2024. The British Council’s support from grant-in-aid has decreased from 2023 to 2024 by some £12m.
- **Increases** in:
    - China where the budget for the Confucius Institutes appears to have increased.
    - Russia, where there appears to have been a significant increase in the budget for Russkiy Mir for 2023.[1]
    - Education bodies such as Germany’s DAAD and France’s AEFE, reflecting the importance of Higher Education.

[1] Data for both Russia and China are limited, so precise figures cannot be given.

- Development bodies including Spain’s AECID and USAID.

Digital:

- It was impossible to make meaningful comparisons of digital reach. Only France and Germany outside the UK publish reliable figures. While there were partial data from China and Russia, their robustness could not be guaranteed.
- It was more feasible and more useful to compare levels of digital maturity.[2] While most comparator countries and organisations were actively developing their digital capabilities, the US State Department, the Development Agencies of France and Germany, and the UK Foreign, Commonwealth and Development Office (FCDO) appeared to have moved further towards digital transformation. While our results at this stage are provisional and to a large degree subjective, we believe that this approach is one to be developed in future analyses, which would be strengthened by qualitative analysis in addition to a survey of published material.

Geography:

As might be expected from an analysis of what is mostly a traditional infrastructure of embassies, consulates, centres, Cultural Institutes and so on, locations still mostly reflect historical and regional priorities. More work needs to be done, however, to understand the extent to which this is changing.

- France remains the country with the largest global footprint, and the USA remains the country which hosts the greatest number of other countries’ overseas locations.
- Some changes which are taking place include the Goethe-Institut’s reduction in the number of its locations, reflecting changed national priorities and lower levels of demand for language learning, and responses to the financial legacy of the pandemic (British Council, UK), and political opposition (Confucius Institutes, China).
- There appears to be a close relationship between operating models and geographical distribution. Countries which work through their embassies have wider global coverage. This can be augmented by cultural centres based within the embassy (IGR, Brazil) or when the embassy is at the heart of an in-country network which can include centres of various kinds (USA, Russia), regulated local partners (France), and voluntary organisations (USA).
- There was no evidence of a substantial change in geographical distribution due to the growth of digital services. While some countries were undergoing digital transformations, there was no clear evidence from this study of whether/how this would impact on the capital infrastructure.

[2] Digital maturity is the measure of an organisation’s ability to create value through digital. The most commonly used model is that of Google and Boston Consulting.

Signposts

This study has identified a number of areas where comparative analysis suggests that further work is required:

- **Policy co-ordination**: the UK is an outlier in its lack of mechanisms to coordinate its soft power policies, strategies and activities across Government and with business and civil society. This reflects the history of how soft power has developed in the UK and the relatively low level of priority accorded to it, compared to other countries. As the global environment becomes more competitive, other countries are acting to improve policy and delivery alignment to gain strategic advantage. This trend has not yet resulted in significant change, but lessons could be learned by the UK.
- **Economic benefits to the UK**: countries in this study explicitly address the economic as well as foreign-policy dimensions of soft power in a range of ways through activities intended to boost domestic sectors, mainly Higher Education and Cultural and Creative Industries. In an increasingly connected world, soft power could prove to be instrumental in achieving economic success. However, a narrow culture-centred analysis of soft power greatly limits the understanding of this power in the real world, and results in the underestimation of its value and impact. Economic effects are expected to be more consistent, observable, and attainable when compared to political ones, such as spreading democracy,[3] suggesting that further work to understand this would be beneficial.
- **Foreign and domestic**: related to the economic agenda, is the way in which soft power is based on 'attraction', which mostly derives from domestic policy in relation to relevant sectors (mainly Higher Education and Cultural and Creative Industries). This intersection is intentionally managed in other countries (e.g. France, Germany, South Korea) through Governmental governance and co-ordination mechanisms, which often also involve sub-state actors (regional and local government, civil society and business). In addition, some states actively promote and make the case for their soft power activities to domestic populations (South Korea, USA).
- **Digital**: despite a turn to the digital in most countries, the global picture is mixed, and more work is urgently required to understand better how digital transformations and infrastructures are impacting on strategies, business models, activities, engagements, impacts and outcomes. This work should consider the advent of generative AI which has the potential to be extremely disruptive. While there are signs that the surge in investment in digital during the pandemic is showing signs of receding in some countries, others are looking creatively at the potential of data-driven approaches to delivery (Germany, USA), building the digital capacity of development partners (Germany), understanding the relationship between digital and analogue delivery (most countries), and how digital impacts on core concepts such as trust, collaboration, and dialogue. In addition, countries such as South Korea are exploiting

[3] See: Daniele Carminati (2022) The economics of soft power: Reliance on economic resources and instrumentality in economic gains, Economic and Political Studies, 10:1, 19-43, DOI: 10.1080/20954816.2020.1865620

the Internet as a space through which to secure presence at scale in ways which do not show up in traditional measures of reach.

- **Geographical focus**: the physical location of activities mostly reflects decisions taken in the (often distant) past. However, lessons can be learned from other countries about how to optimise investments in the capital infrastructures of soft power, both at home and abroad, relative to geopolitical and economic priorities. Countries including France, China, and the USA operate a range of models, which follow different imperatives. These differ from those based on traditional Cultural Institutes in landmark buildings, and potentially offer significantly larger global footprints at significantly lower costs.
- **Soft Power**: the term 'soft power' was challenged and rejected in some countries (e.g. France) as irrelevant in an increasingly Hobbesian world of '...unending though irregular oscillation between actual war and uneasy peace'.[4] Countries which used the term did so in different ways, depending on their geopolitical (UAE, Russia) and geoeconomic (China) aims.
- **Monitoring**: the UK is currently considered a "soft power superpower," but this position is not guaranteed. By monitoring global trends, the UK can understand better what its soft power levers are, compared to other countries, and how its soft power can continue to operate and evolve effectively and efficiently in a rapidly changing and increasingly competitive world, in support of both its values and its interests. Appendix A proposes a baseline template for future monitoring.
- **Situational analysis**: improved data-driven situational analysis of its operating contexts at country and regional level, will better equip the British Council with valuable insights to make informed decisions, tailor its programmes, allocate resources strategically, advocate for its work, and ultimately enhance the effectiveness and impact of its activities.
- **Diaspora engagement**: human population mobility[5] in the form of diasporas was an important priority in the soft power policies and strategies of most countries in this study, and our assessment is that it will be increasingly important. As well as diasporas' traditional value as a source of revenue via remittances and taxation, countries (Australia, New Zealand, Denmark) have begun to recognise how they could also be of value in filling skill gaps at home, in particular in STEM and IT, and are in the process of devising attractive packages to lure them home. Their value as a political resource is also likely to increase, both in democratic countries as an addition to the voting population at election time, and in authoritarian countries, as active advocates, willing or otherwise, for their countries foreign and domestic policies.

[4] See: Williams, H. and Williams, H., 1996. John Locke and International Politics. *International Relations and the Limits of Political Theory*, pp.90-109.
[5] According to the United Nations, January 2024: "Apart from the pandemic years, global mobility has increased in the last two decades, including the movement of transient populations who do not fit into the standard definitions of international migrants." See: https://unece.org/sites/default/files/2024-02/06_TF_New_forms_migration_ToR_approved.pdf

- **Religion**: several countries in our study use religion as part of their foreign policy to emphasise shared values, culture and kinship. Examples of this include the funding of faith schools, missionary work, religious international NGOs and the construction of places of worship.

Introduction

This report compares the British Council with a sample of 18 countries and the EU's organisations which are engaged in what we will call 'soft power' for the purposes of this report,[6] and are therefore comparable to, or analogues of, the British Council. The sample was chosen by the British Council.[7]

The scope of this report therefore is restricted to:

- Embassies which have a significant role in terms of activities comparable to those of the British Council (Arts and Culture, Education, Language).
- Cultural Institutes analogous to the British Council, such as the Goethe-Institut.
- International Development (ODA) organisations which have a significant role in terms of activities comparable to those of the British Council.
- Other organisations which operate in relevant areas of activity.

Given the requirement of comparability we excluded consideration of broadcasting, information services, tourism and sport, as areas of 'soft power' activity where the British Council did not currently have a role. We also excluded other 'soft power assets' such as museums, or sub-national public authorities or organisations, See below for a full list of comparators.

The study aims to understand and evaluate these organisations as key actors/agencies, comparable to the British Council in the ways in which they use 'soft power' as a means to influence global affairs within their respective public policy frameworks. We do this in order to help analyse the operating environment which the British Council (and by extension the UK) is in, in early 2024. We aim to unpack how these policy frameworks are evolving within the overall geopolitical and geoeconomic context, and how that is impacting on the work of the comparator organisations.

One issue in carrying out a comparative study, is that the British Council is a unique (or at least atypical) organisation in two main respects:

- *History:* there is a 90-year-old tradition of how the British Council is structured, governed, and operates, that is understood by national and global stakeholders and has been cited as an inspiration by other countries.[8] The British Council was created in 1934 in a time of ideological competition (Bolshevism, Fascism)[9] that is somewhat

[6] Within 'soft power' we refer to a variety of framings, principally: Public Diplomacy; Cultural Diplomacy; Cultural Relations.

[7] We are aware that this sample is partial. It necessarily excludes major countries, non-state actors, and actors active in fields such as broadcasting or sports which make a major contribution to shifts in soft power, globally.

[8] See for example the Goethe-Institut, which was created in 1951 to replace the Deutsche Akademie, seen as too associated with the Nazi state. The Goethe-Institut was created, however, as an "intermediary organisation" of the Federal Foreign Office, integrated into post-war national contexts of meaning and value systems.

[9] On the one hand the *"...radical and internationalist cultural ferment that surrounded, and was to a degree fostered by, the Comintern"* (Lawton, D. 2020. Chronology: Comintern Aesthetics – Between Politics and Culture. In: Glaser, A. and Lee, S. ed. Comintern Aesthetics. Toronto: University of Toronto Press, pp. xiii-xxii. https://doi.org/10.3138/9781487530631-002), and on the other the activities of Italy's fascist regime in the interwar

comparable to today, to demonstrate British values of cultural and educational independence from propaganda and direct state control.

- *Structure:* as we have noted in previous comparative studies, the British Council is structurally unusual for an arm's length Cultural Institute (CI), in that it has a multi-disciplinary approach, working in a variety of fields (education, arts, English language). While Ministries of Foreign Affairs (MFAs) tend to combine these functions, in other countries arm's length analogues to the British Council tend to be specialised agencies, with a focus on one of these fields.

A comparative study is, however, possible, by focusing on activities as well as structures, as the basis for comparison. This gives us three main groups of organisations that promote cultural exchange and international cooperation:

- **Analogues:** which most resemble the British Council in terms of activities, structure, and level of operational independence. Examples include the Goethe-Institut (Germany), the Institut français (France), and the Japan Foundation (Japan). While they are similar to the British Council in their aims (promoting their respective countries' cultures, languages, and educational systems internationally), their specific objectives may vary, as can their specific remits, structure, scale, governance arrangements, business model, and level of resource.
- **Ministries of Foreign Affairs (MFAs):** such as the US State Department, which carry out analogous activities. Comparisons with MFAs can, however, be challenging. Crucially, MFAs operate as a part of their government and are subject to political influence, direction, and changes in administration, while arm's length bodies such as the British Council have traditionally been more autonomous and less susceptible to political shifts. MFAs are also responsible for a wide range of diplomatic and foreign policy activities, and it is not always clear what degree of relative priority or resource is given to activities comparable to those carried out by the British Council.
- **Outliers:** Finally, there are comparators which are outliers in terms of their degree of comparability with the British Council but do carry out comparable activities. These include the Chinese bodies (unique in many dimensions), major ODA bodies (USAID, GIZ etc) with analogous activities, the innovative MFAs of the Gulf States which have recently come to 'soft power', and ifa (Germany) which has similar interests to the British Council, but is very different in history, specific remit, structure and governance.

period which developed a distinctive model that applied state power to international cultural exchange, and mobilised the idea of 'culture' itself, in a new and influential manner (Martin, B.G., 2021. The Birth of the Cultural Treaty in Europe's Age of Crisis. Contemporary European History, 30(2), pp.301-317.)

Table 1: Comparators most analogous to the British Council

Country	Institute
France	Institut français
France	AEFE
France	Campus France
France	Alliances Françaises Foundation
Germany	Goethe-Institut
Germany	DAAD
India	ICCR
Italy	Istituto Italiano di Cultura
Italy	Dante Alighieri
Japan	Japan Foundation
Japan	Japan House
Portugal	Instituto Camões
Republic of Korea	Korea Foundation
Republic of Korea	Korean Cultural Centres
Russia	Rossotrudnichestvo
Russia	Russkiy Mir
Spain	Instituto Cervantes
Türkiye	Yunus Emre Institute
Türkiye	Turkish Maarif Foundation
UK	British Council

Table 2: Ministries and comparators which are embassy-based

Country	Ministry
Australia	Department of Foreign Affairs and Trade (DFAT)
Brazil	MFA (The Guimarães Rosa Institute (IGR) is part of the MFA).
Canada	Global Affairs Canada
European Union	EEAS
France	SCAC (based in 90% of French embassies).
India	Ministry of External Affairs (MFA)
Italy	MFA: Directorate for Public and Cultural Diplomacy
Japan	MOFA
Portugal	MFA
Republic of Korea	MFA
Russia	MFA
Saudi Arabia	MOFA
Spain	MFA
Türkiye	MFA
UAE	MOFA
UK	FCDO
USA	MFA: State Department Public Diplomacy and Public Affairs, including the Bureau of Educational and Cultural Affairs (ECA).

Table 3 Outliers

Country	Institution
China	Confucius Institutes
China	China Cultural Centers & CNTA
European Union	EUNIC cluster network
France	Agence française de développement (AFD)
Germany	Ifa
Germany	GIZ
Spain	AECID
USA	USAID

By classifying the comparators in this way, we aim to make the comparisons as valid as possible within the constraints of this study and thereby make sense of the data we have collected. We acknowledge that by relying solely on published sources, this study lacks the qualitative data needed to test and dig beneath the surface of the assumptions we are making,. Nevertheless, we have been able to identify broad trends and some specific developments that enable us to form tentative conclusions and identify signposts for further work.

Context

Geopolitics and geoeconomics: tension and uncertainty

There is a general consensus among Governments, International Organisations, leading think tanks, commentators, and academics that the world in 2024 is becoming a more dangerous place:

> *"Throughout 2023 to 2024 the FCDO has continued to operate in volatility, driven by more dangerous geopolitical trends and more challenge to the international order."* [10]

According to the European Union, three key factors dominate: global disorder, shifting economics, and the numerous important elections taking place across the world.

- EU: Forward Look, 2024: The **global order is becoming weaker and more volatile**. We now see that not only are we moving towards a more fragmented and multipolar world, but that the main 'poles' of the emerging global structure are finding it difficult to retain their power of attraction and fulfil their traditional role of creating international order.
- The **global economy is currently undergoing major shifts**. We are currently in a transition phase in which old models are increasingly being challenged and revealed as unsustainable, while alternatives have still to take shape. A new more stable system has not yet been established.
- There is a risk of **greater political polarisation and democratic backsliding**. 2024 will be a crucial year for elections worldwide. They constitute a point of uncertainty, can have an impact on the wider political and economic landscape and can even expose and increase societal tensions.

The sense of risk is increasing. Christoph Heusgen, Chairman of the Munich Security Conference remarked in his introduction to *"Lose-lose, the Munich Security Report 2024"*:

> *"Unfortunately, this year's report reflects a downward trend in world politics, marked by an increase in geopolitical tensions and economic uncertainty.... many governments are rethinking their international engagement, paying closer attention to the vulnerabilities that come with interdependence and who benefits more from cooperation."* [11]

War, or the threat of war, is back:

> *"Right now, war—or the threat of it—menaces East Asia, Europe, and the Middle East. Biden says the 2020s will be the "decisive decade" for the world."* [12]

---

[10] FCDO, 27 February, 2024: https://www.gov.uk/government/publications/fcdo-supplementary-estimate-memorandum-2023-to-2024/fcdo-supplementary-estimate-memorandum-2023-to-2024

[11] https://securityconference.org/en/publications/munich-security-report-2024/

[12] Hal Brands, Foreign Affairs, 20 February, 2024: https://www.foreignaffairs.com/united-states/age-amorality-liberal-brands?utm_medium=newsletters&utm_source=fatoday&utm_campaign=The%20Age%20of%20Amorality&utm_content=20240228&utm_term=FA%20Today%20-%20112017

For this study, and recognising the limitations of this approach, we considered a range of indices as a proxy for a dashboard to illustrate the global context within which 'soft power' activities take place:

Table 4: Indices

Country	Soft Power	Power	External perception	GDP	Democracy	Social Progress	Press Freedom	Academic Freedom	Corruption
Australia	13	12	18	14	14	8	27	30	14
Brazil	31	14	62	9	32	67	92	120	104
Canada	7	13	6	10	25	15	15	38	12
China	3	2	69	2	172	77	179	169	76
France	6	5	9	7	12	24	24	31	20
Germany	5	6	3	3	11	10	21	5	9
India	29	7	52	5	104	111	161	131	93
Italy	9	9	24	8	23	26	41	4	42
Japan	4	4	34	4	30	16	68	108	16
Portugal	27	0	29	49	26	23	9	22	34
Republic of Korea	15	10	37	13	47	17	47	45	32
Russia	16	8	54	11	159	76	164	149	141
Saudi Arabia	18	11	114	19	170	90	170	170	53
Spain	11	0	13	15	24	25	36	16	36
Turkïye	25	15	53	17	140	85	165	166	115
United Arab Emirates	10	0	65	31	154	51	145	160	26
United Kingdom	2	3	14	6	20	21	26	61	20
United States of America	1	1	46	1	19	29	45	76	24
Key:	Decline	No change	Improvement	No data					

We used the 2024 BrandFinance soft power index[13] which ranked the countries in our sample[14] to a range of other indices which ranked these countries over time on a number of other dimensions relevant to soft power:

- **Shifts in power:** the **Bonn Power Shift Monitor** which monitors the shifting nature of power in the 21st century.[15]
- **External perception:** the **Good Country Index** which *"...reports on each country's external impacts, positive and negative, outside its own borders".*[16]
- **GDP:** the **IMF**'s measure of GDP.[17]
- **Democracy:** vDem's **Democracy Index**, 2024.[18]

13 https://brandirectory.com/softpower/

14 Since 2023 three had been: small gains for China, Italy, Japan and Saudi Arabia, small decrease for Canada, and a more significant decrease for Russia.

15 https://www.cgs-bonn.de/en/bonn-power-shift-monitor/

16 https://goodcountry.org/index/about-the-index/

17 https://www.imf.org/external/datamapper/NGDP_RPCH@WEO/OEMDC/ADVEC/WEOWORLD

18 https://v-dem.net/

- **Social Progress:** The **Social Progress Index**, 2024, which *"...is one of the world's largest curated collections of social and environmental data. It uniquely concentrates on the non-economic aspects of global social performance".*[19]
- **Press Freedom:** The **World Press Freedom Index**, 2023.[20]
- **Academic Freedom:** The **Academic Freedom Index**, 2023.[21]
- **Corruption:** as a proxy for trust levels in each country, the **Corruption Perceptions Index**, 2023.[22]

In our sample of countries, while their soft power ranking remained broadly constant, there were:

- A decline in relative power in seven countries.
- Significant declines in thirteen sample countries' rankings for external impacts.
- Declines in social progress in eleven countries.
- A shift towards autocracy in three countries.[23]
- Evidence of decline in press freedom in eight countries, academic freedom in seven, and an increase in perceived levels of corruption in nine.

The indices quoted were selected for their relevance and, as far as possible, their methodological robustness. While the limitations of using such indices to inform policy or decision making are apparent, taken in the aggregate, they do seem to confirm that countries' rankings for soft power seem to be more closely aligned to their rankings for GDP and democracy than to their rankings for power or external perceptions. This is suggestive, but further work would need to be done to test this apparent correlation.

It is therefore hard to draw conclusions from this macro-level analysis for the British Council, except to note that the global environment is uncertain, and that the operating context is subject to regional and national-level variation.

Other relevant contextual developments

Official Development Assistance (ODA): is government aid that promotes and specifically targets the economic development and welfare of developing countries.[24] It is central to the

---

[19] https://www.socialprogress.org/2024-social-progress-index/

[20] https://rsf.org/en/index

[21] https://academic-freedom-index.net/

[22] https://www.transparency.org/en/cpi/2023

[23] The level of democracy enjoyed by the average person in the world in 2023 is down to 1985-levels. Autocratisation is ongoing in 42 countries, home to 2.8 billion people, or 35% of the world's population. India, with 18% of the world's population, accounts for about half of the population living in autocratising countries. Democratisation is taking place in 18 countries, harbouring only 400 million people, or 5% of the world's population. Brazil makes up more than half of this, with its 216 million inhabitants.

[24] https://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/official-development-assistance.htm

work of the countries and institutions considered in this report. The United Nations has a target for countries to spend 0.7% of their Gross National Income (GNI) on Official Development Assistance (ODA). Since 1960, only 15 countries have ever met the UN target.

In our sample of countries, in 2022, the most recent year for which statistics are available, the United States was the largest DAC[25] member provider of ODA (USD 55.3 billion), comprising more than a quarter of total DAC ODA, followed by Germany (USD 35.0 billion), Japan (USD 17.5 billion), France (USD 15.9 billion) and the United Kingdom (USD 15.7 billion). Many providers beyond the DAC – including some countries included in this study - have long traditions of development cooperation. Amongst these, according to the preliminary figures for 2022 reported to the OECD, Türkiye and Saudi Arabia exceeded the 0.7% ODA/GNI target at 0.79% and 0.74% respectively. The UK's contribution rose in 2022 by 6.7%, due to an increase in its GNI for 2022 and some additional funding for in-donor refugee costs. If these are excluded, however, its ODA fell.[26]

Agenda 2030: The Secretary-General of the UN, António Guterres, has stated that Agenda 2030 is in need of urgent action "Because halfway to 2030, we are far off track."[27] There is no space here to analyse progress in detail, but the WEF notes that:

> *"Once again, the widening economic gap between developed and developing nations, along with the uneven impacts of the climate crisis, are highlighted as of particular concern.*
>
> *While the decline in SDG progress is universal, poorer countries are being disproportionately affected by the consequences, largely due to a lack of representation on the global stage... The number of people in extreme poverty is rising for the first time in a generation and is on track to reach 575 million by 2030."*[28]

Multilaterialism

The general state of multilateralism in early 2024 is precarious, marked by both challenges and opportunities. In his 2022 address to the UN General Assembly, Secretary-General António Guterres cited the *"geopolitical tensions and lack of trust that poison every area of international cooperation."*[29]

The data suggest, however, that levels of support for multilateralism is actually more nuanced. There has been a slight decline in support for the UN since the 1990s,[30] which parallels

---

[25] The Organisation for Economic Co-operation and Development's (OECD) Development Assistance Committee (DAC).

[26] https://www.oecd.org/dac/financing-sustainable-development/ODA-2022-summary.pdf

[27] https://www.un.org/en/common-agenda/policy-briefs

[28] https://www.weforum.org/agenda/2023/09/un-sustainable-development-goals-progress-report/

[29] https://www.un.org/sg/en/content/sg/statement/2022-09-20/secretary-generals-address-the-general-assembly-trilingual-delivered-follows-scroll-further-down-for-all-english-and-all-french?_gl=1*1sr0fa7*_ga*MTAyNTg4NTg4OS4xNTcyMDI4NDQ0*_ga_TK9BQL5X7Z*MTY3MDk2NjY0MS41LjEuMTY3MDk2NjY2Ny4wLjAuMA..

[30] https://theglobalobservatory.org/2023/02/do-people-trust-the-un-a-look-at-the-data/

a broader decline in support for international organisations more generally.[31] Beyond these longer-term trends, however, confidence in the UN seems to have remained fairly steady over the past decade, and it is difficult to make confident claims about the impact of recent global crises like the COVID-19 pandemic or Russia's invasion of Ukraine.

The emergence of multipolarity has also presented significant obstacles to multilateralism. One response has been the growing popularity of "minilateralism," where small groups of nations collaborating to tackle problems or pursue mutual goals. Countries in our sample that have been active in this way include France, India and the UAE.[32]

There are opportunities in this context, especially for building issue-specific alliances focused on specific objectives, for engaging new actors including International Organisations, civil society, non-governmental organisations, and the private sector in decision-making processes to foster broader ownership and legitimacy.

The Summit of the Future in 2024[33] may offer an opportunity to reinvigorate the UN with concrete reforms, addressing key concerns and establishing a roadmap for future action.

Domestic political and policy environments

In 2024 several key issues dominate the intermestic[34] foreign policy landscape, with implications for both international relations and domestic politics. In addition to international agreements which depend on domestic implementation for success (e.g. the Paris Agreement on climate change), issues such as migration, emerging technologies, security and the desire to protect domestic markets, all impact on areas of activity which are relevant to this report. This is particularly true in relation to International and Transnational Higher Education, Cultural and Creative Industries, language teaching and learning and diaspora engagement. Issues related to memory, heritage, history, self-image and identity also spill over the boundary between the domestic and the international.

Trust and corruption

Global peace has been deteriorating for fifteen years and corruption has been both a key cause and result of this. Corruption undermines governments' ability to protect people and erodes public trust, making it harder to control security threats. On the other hand, conflict creates opportunities for corruption and subverts governments' efforts to stop it.

Transparency International's Corruption Perceptions Index, which ranks countries based on perceived levels of public sector corruption, has shown a downward trend over the past decade, suggesting that corruption has increased. The Index suggests that the pandemic has led to an increase in corruption risks, with emergency procurements, new public spending programmes,

[31] https://link.springer.com/article/10.1007/s11558-019-09351-3

[32] https://www.washingtoninstitute.org/policy-analysis/minilateralism-concept-changing-world-order

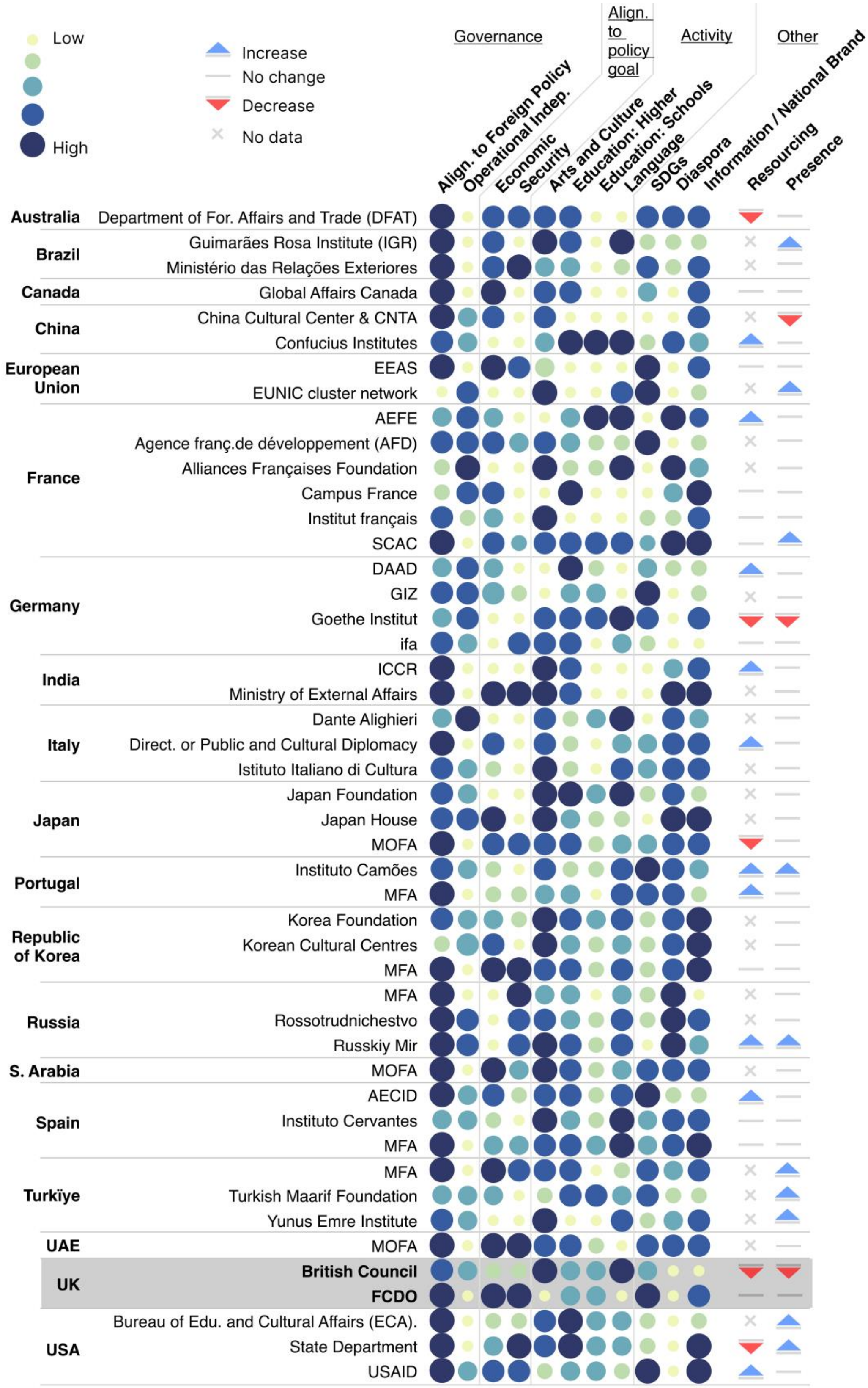
[33] https://www.un.org/en/common-agenda/summit-of-the-future

[34] The term "intermestic" refers to issues that have both domestic and international aspects, making them complex and challenging to manage.

and disrupted oversight mechanisms creating opportunities for corrupt actors. Advances in technology and digitisation have also brought new challenges, such as cybercrime and cryptocurrency-related corruption.

Findings

Table 5: summary of the policy alignments, activities, trends in resources and presence of the comparator institutions:



The table shows that:

- Levels of alignment to foreign policy remain high, and levels of operational independence are highly variable.
- Economic policy alignment is strong in some countries and security policy also plays in important role.
- In terms of activities:
    - in education, the emphasis is on the tertiary level, arts and culture is the commonest area of activity, language learning and teaching remain important.
    - SDGs, diaspora engagement and information work are also significant.
- In terms of resources there is a mixed picture. While there have been (small) increases in some countries and institutions, there have also been significant reductions.
- There is evidence of transformation activities for some, both positive (towards growth or positive strategic change) and negative (reductions in activity or autonomy).
- In terms of presence, there have been both positive and negative changes, but these have not been significant in scale.

Policy Drivers

In our previous comparative study for the British Council, in 2022[35], we found that the policy priorities for countries' soft power and cultural relations activities were support for foreign policy and economic growth followed by the need to face global challenges, and the promotion of values such as human rights, democracy, or peace and harmony. In 2024, we identified a number of shifts in emphasis.

[35] Soft power and cultural relations, A comparative analysis. British Council, 2022: https://www.britishcouncil.org/sites/default/files/soft_power_and_cultural_relations_a_comparative_analysis_.pdf

Table 6: Policy drivers: 2022-2024[36]

Country	2022	2024	Country	2022	2024
Australia	X	Ec	Republic of Korea	FP	FP
Brazil	FP	Ec	Russia	FP	FP
Canada	X	R	Saudi Arabia	X	Ec
China	FP	FP	Spain	X	FP
European Union	FP	Ec	Turkïye	FP	Ec
France	FP	FP	UAE	FP	FP
Germany	FP	FP	**UK**	FP	FP
India	FP	Ec	USA	FP	FP
Italy	X	FP			
Japan	FP	FP			
Portugal	X	FP			

FP Foreign Policy; R Repuation; Ec Economic; X No data

Policy alignment: since 2022, analysis of policy alignments showed a shift in emphasis from global challenges to national interest. The clearest example of this was in the USA. In his 2023 Congressional Budget Justification to Congress for the State Department, Secretary Blinken gave his priorities as to:

> "...continue to lead the world in tackling global challenges and upholding the international system that the United States did so much to build."

Whereas in his 2024 Congressional Budget Justification, the priorities have changed to:

> "...continue to *promote U.S. national interests* (our italics) and lead the world in tackling global challenges."[37]

The shift towards national priorities was also evident from measures countries such as France and Germany had taken to ensure that the soft power activities of their various agencies were more closely aligned to foreign policy. The SCAC, France's Cooperation and Cultural Action Network, is described as "*the heart of the influence, outreach and international development missions of the Ministry of Europe and Foreign Affairs".* It brings together 12 operators

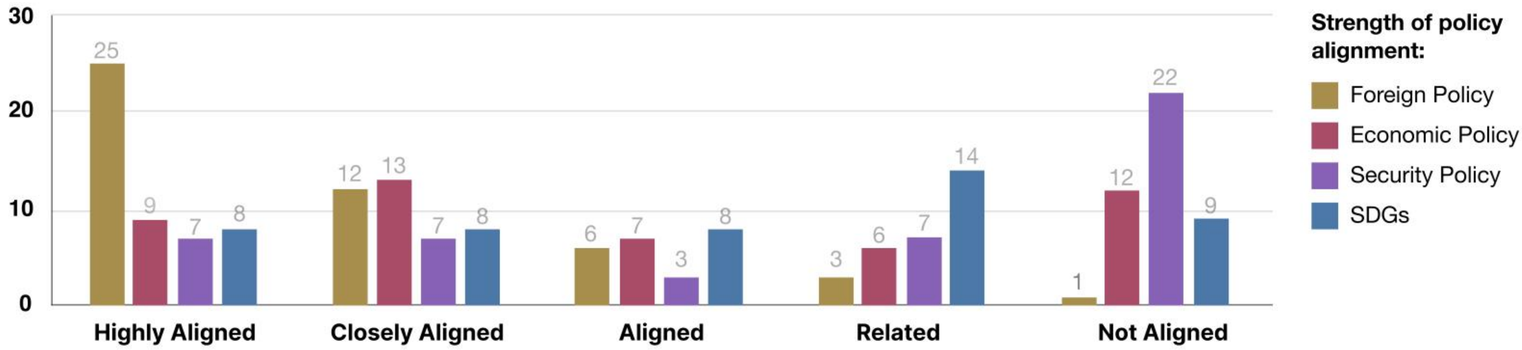
[36] Note to table 7: an X indicates that the country was not included in our 2022 sample. Where the table shows 'Economic' as a policy driver, this means that in that countries' published material, economic considerations such as support to domestic sectors are given prominence. The table indicates where countries which were included in the 2022 report (such as Brazil or India) appear to have given greater policy *emphasis* towards the economy. For other countries, economic considerations are a priority. This does not imply that foreign policy is not a driver, only that economic policy is becoming more important.

[37] There is no mention at all of Public Diplomacy or of the work of the ECA in either of Secretary Blinken's introductions.

including the Institut Français, the Alliances Françaises, the AEFE and others to implement a global diplomatic strategy on the ground, a *"vector of image and competitiveness."* [38]

Overall, while 37 of the 47 Analogues, Ministries and Outliers were either highly aligned or very aligned to foreign policy goals, a clear sign of strong focus, only 16 were similarly aligned to SDG delivery. A larger number (22) were highly aligned or closely aligned to economic policy while a similar number (15) were aligned to security policy.[39]

Table 7: Comparative strength of policy alignment: of the 47 Ministries and institutions:



The framing of policy lags behind policy shifts: the largest group of countries surveyed retained their Public or Cultural Diplomacy framing, but there was a significant group of five countries (China, Germany, India, Türkiye and the UAE) whose framing seems to have ‘hardened’ away from Cultural Diplomacy towards more overtly foreign or economic policy-oriented frames, mostly to ‘soft power’, and in one case (the UK) towards ‘prosperity’. There did not, however, seem to be any clear correlation between changes in policy drivers and changes in published ‘frames’, implying a lag between policy and rhetoric.

The intermestic: a major theme of this study is the extent to which domestic politics impact on foreign politics (including for soft power) and vice versa – this mix is referred to as “intermestic”. Public opinion, economic considerations, political ideologies (such as populism and nationalism), and specific interests combine to shape foreign policy frameworks. We found clear evidence of the domestic taking more priority in this study, whether it be the specific budget allocation to the US State Department (ECA) to explain Public Diplomacy to the American people, the extensive involvement of domestic stakeholders in South Korean Public Diplomacy, the (long-standing) emphasis on civil society in Germany, and the need expressed in many countries to benefit their own Higher Education (HE) or Cultural and Creative Industry (CCI) sectors.

[38] https://www.diplomatie.gouv.fr/fr/le-ministere-et-son-reseau/les-metiers-de-la-diplomatie/un-reseau-diplomatique-essentiel-a-la-politique-etrangere-de-la-france/le-reseau-de-cooperation-et-d-action-culturelle-et-ses-metiers/

[39] Countries and organisations in almost all cases have multiple policy alignments.

In addition, populism and nationalism are impacting on foreign and development policies in two main ways:

- They can lead to a more *inward-looking and isolationist* approach to international affairs, where leaders are less willing to engage in international cooperation and may be more likely to prioritise domestic interests over international obligations, making it more difficult to address global challenges such as climate change and poverty, and
- They can also lead to a more *assertive and proactive* foreign policy. Populist and nationalist leaders may be more willing to challenge the existing international order, leading to increased tensions and instability in the international system.

Our study revealed examples of both of these in comparator countries. Other countries in our sample that could be said to exhibit signs of populism and nationalism via a more assertive foreign policy are Brazil, India, and Turkey. Russia is notable as a country which is *both* inward-looking and assertive. Its stance in 2024 faces economic challenges and prioritises internal development to some extent, while its actions in Ukraine, its cyber activities, and its broader foreign policy ambitions demonstrate a continued willingness to project power and influence on the global stage.

Migration and diaspora engagement are the areas where domestic policies and soft power activities intersect most sharply and they are a strong feature among the comparator groups, though not in the same way in every country.

- **Migration** (immigration) policies intersect with soft power activities mainly in relation to HE, where the goals of MFAs and British Council analogues intersect with those of Education Ministries, Ministries in charge of borders, the HE sector and on occasion, sub-national public authorities. This is a complex area where there can be conflicting imperatives and goals (see the section below on HE).
- **Diaspora engagement** is a major feature of many countries' soft power policies. The UK is an outlier here, albeit it is not alone – Germany and the USA similarly do not focus on their diasporas. The focus can be on engaging with diasporic communities in order to develop their cultural connections to the home country. This is a feature of the *"Compatriots"* work of Rossotrudnichestvo which *"...supports the initiatives of compatriots aimed at preserving linguistic and ethno-cultural identity, revealing creative potential, promoting traditional spiritual and moral values, as well as educating young people in the spirit of love for Russia."* [40]
- Diaspora engagement can also aim to:
  - *Connect people with their country of origin:* examples include India's *"Tracing Your Roots"* programme to help Persons of Indian Origin (PIOs) trace their roots in India.[41]
  - *Encourage the return of emigrants:* China's "*Thousand Talents Programme"* has been running since 2008 to attract overseas Chinese scientists and researchers to return to China and contribute to its scientific advancement (since 2011 it has also been open to younger talent and to foreign scientists and more than 7,000 people have taken advantage of it.[42]

---

[40] https://rs.gov.ru/en/activity/compatriots/

[41] https://www.mea.gov.in/tracing-the-roots.htm

[42] https://www.nature.com/articles/d41586-018-00538-z.pdf

- *Provide digital information services:* South Korea's "*Korea.net*" website provides information about Korean culture, language, and society to the global Korean community.

The policies and diaspora engagement strategies of other countries, including several not in the current sample, such as Ireland or Denmark, as well as the UK's Devolved Administrations could be of interest.[43]

Higher Education (HE)

Simon Marginson[44] notes that the geopolitics of HE are changing:

> *"Until recently the global space-making activities of universities appeared to be generally compatible with national politics and policy agendas. This is no longer the case. A more strident and often nativist nationalism is evident. The United States (U.S.) government has set out to decouple from China in science and technology in order to retard that country. Many states have imposed new restrictions on inward student mobility. The near universal support for internationalisation apparent in 1990-2010 has fragmented and universities engaged in both nationalism and globalism are under pressure to choose."* [45]

This analysis notes that geopolitics impacts on international student mobility. It is beyond the scope of this study to do more than note that this relationship exists. Nor can we attribute causal links between net flows and the activities of the British Council and its comparators. We can, however, note that on the basis of UNESCO's Global Flow of Tertiary-Level Students data,[46] the UK has been remarkably successful at attracting international students,

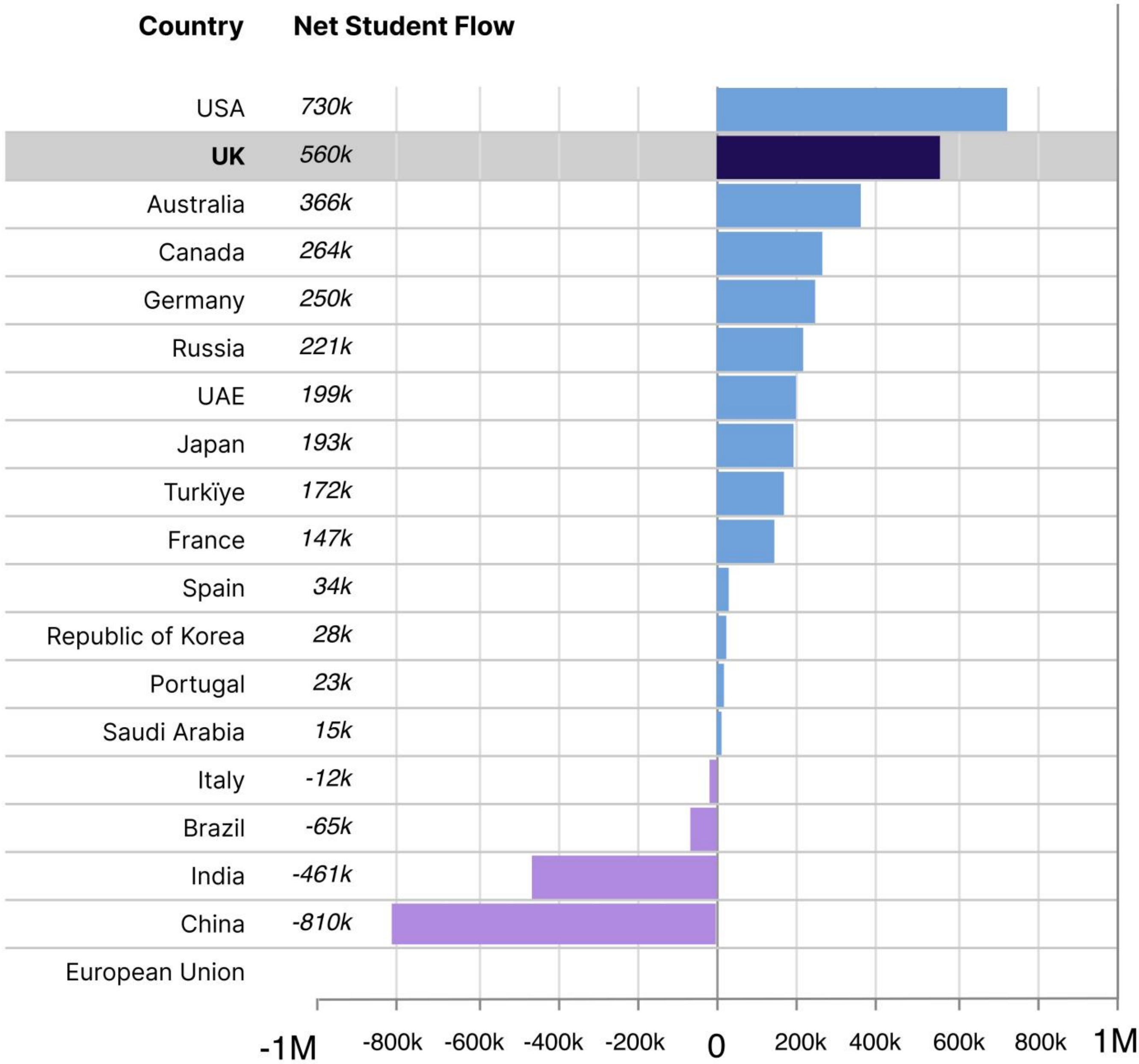
[43] The UK's Devolved Administrations are already starting to develop strategies. See Scotland's Scottish Connections Framework, and the literature review by ICR Research which contributed to that Framework.

[44] Professor of Higher Education at the University of Oxford, Director of the ESRC/RE Centre for Global Higher Education.

[45] Simon Marginson, The New Geo-politics of Higher Education 2: Between Nationalism and Globalism, Working paper no. 108 January 2024, https://www.researchcghe.org/publications/working-paper/the-new-geo-politics-of-higher-education-2-between-nationalism-and-globalism/

[46] https://uis.unesco.org/en/uis-student-flow

Table 8: International student numbers by country



The table makes it clear that most international students come from China and India and that therefore there is an element of competition for the UK and for other countries on continuing to attract international students from these countries. It is also worth noting that the UK's main competitors in its principal markets for international students, include both countries which are close allies of the UK (the USA, Australia, Canada, Germany...) and countries which are not (Russia).

This pattern may not be sustainable due to the 'intermestic' dimension of soft power as there is a strong element of domestic policy interest as efforts to attract international students can conflict with domestic immigration policies, creating a risk to the finances of domestic Higher Education institutions. Visa practices being introduced by the UK, Canada and Australia as a result of attempts to control immigration more actively are having a significant impact on prospective student demand for study in those countries, all of whose Higher Education systems are highly dependent on international student recruitment for their financial viability.

As competition for international students becomes even more intense those countries where the state takes upon a strategic role in promotion and recruitment (Germany, France and the USA are good examples) are likely to benefit. Australia has recently recognised this imperative and among recommendations of its Higher Education review is a new Commission which will develop this capability.

Resources

Making robust international comparisons of state funding levels for soft power initiatives in 2024 is challenging due to a number of factors including:

- Lack of standardised definitions and measurements. There is no universally accepted definition of 'soft power', or metric to measure it.
- Countries vary in what they include in their budgets. Some include cultural diplomacy, international broadcasting, or exchange programmes, while others may have a broader or narrower interpretation.
- Data reporting is inconsistent. Not all countries publicly disclose detailed information about their soft power budgets and expenditures.
- Countries' different accounting practices and fiscal years. Some countries report soft power expenditures as part of larger budget categories, while others have dedicated line items.
- Multiple funding sources: In some countries, soft power initiatives may be funded through various government agencies, ministries, sub-national entities, or even businesses, making it challenging to consolidate and compare the total funding levels accurately.

While a great deal of work would need to be done to make completely robust international comparisons, it is questionable whether it is necessary for this exercise. Enough countries, including the closest analogues to the British Council, do provide enough good quality data to enable some meaningful comparisons, and it is also possible to identify trends within countries. Taken together, these allowed us to draw some tentative conclusions.

Table 9: State budgets for soft power and direction of change

Country	Change	Amount (£m)
USA	▼	£3,131m
Germany	▼	£871m
Spain	▲	£853m
Japan	▼	£637m
France	▲	£593m
Portugal	▲	£235m
Republic of Korea	—	£169m
UK	▼	£162m
Italy	▲	£153m
China	▲	£100m
Russia	▲	£81m
India (ICCR)	▲	£32m
European Union	—	£12m
Canada	—	£9m
Australia	▼	£3m
Brazil		*no data*
Saudi Arabia		*no data*
Turkïye		*no data*
UAE		*no data*

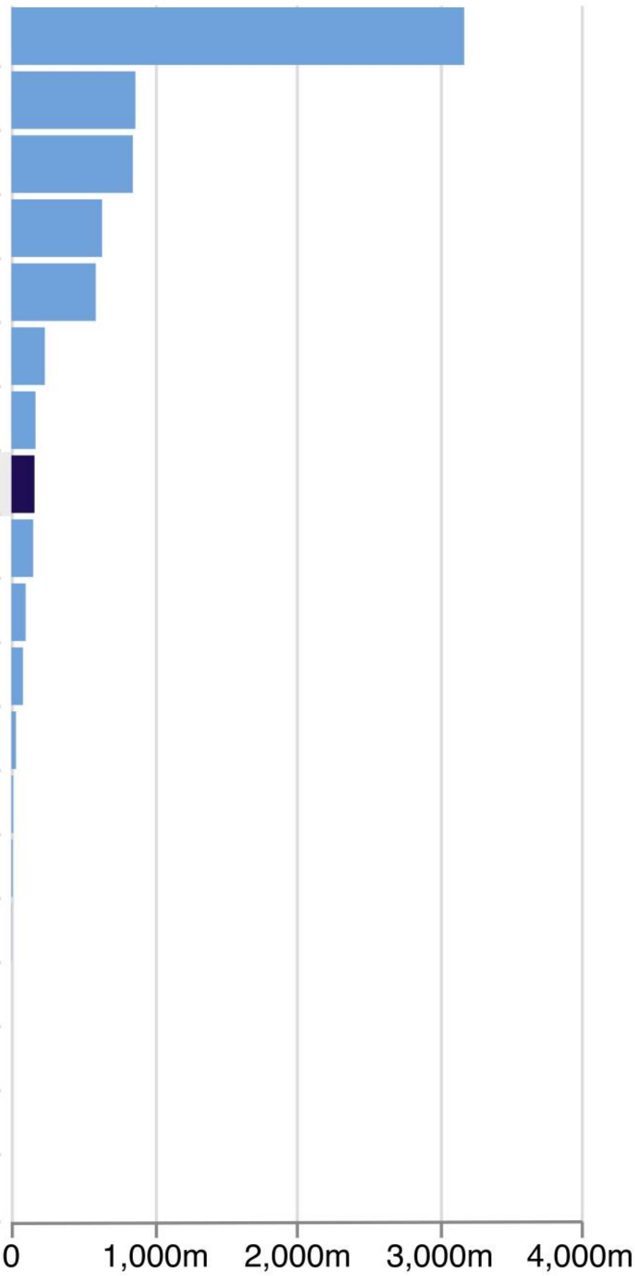


Table 10 shows that the UK is at best a middle-ranking country in terms of the level of state support for soft power. The figures above are not necessarily directly comparable as already noted, but even where they reflect spending on similar activities and institutions, the UK spends considerably less than Germany, France, Spain, or indeed, Portugal.

Where there seemed to be national-level increases, these were mainly among some of the UK’s main geopolitical competitor countries (e.g. Russia) although it should be noted that data were often either missing or based on estimates by commentators. It can more reliably be said that some comparator institutions in countries with more and better quality available published data, have had increases, particularly those engaged with IHE (AEFE, DAAD), reflecting the priority given to IHE by their governments, and ODA activities (AECID, USAID).

The British Council, however, has seen its resources reduced,[47] as have other comparators – all in Western or Western-sympathising countries – Australia, Germany (Goethe-Institut)[48], Japan, and the USA, where the State Department's 2023 budget request for Public Diplomacy remained at the same cash value (£1.18bn) as in the previous year, a real terms cut.

While it is hard to come to firm conclusions, there does seem to be a potentially concerning overall picture from the data we do have, of reductions in the West at the same time as possible increases in autocratic competitors.

[47] British Council Annual Report and Accounts 2022-23, p.71: The main element of this is government grant-in-aid income of £165 million (2021–22: £183 million). The proportion of total income from grant-in-aid has decreased by 1.5% to 18.9% (2021–22: 20.4%).

[48] Goethe Institut: "In order to safeguard the Goethe-Institut's ability to act and, at the same time, enable the expansion of the new presences, the following measures are planned for the coming years:

- Medium-term savings of around EUR 24 million per year
- the closure of nine out of the current 158 locations: Bordeaux, Curitiba, Genoa, Lille, Osaka, Rotterdam, Trieste, Turin, Washington, as well as the Strasbourg Liaison Office
- the change, downsizing or merging of structures, as well as the relocation of presences to more favourable properties
- the reduction of up to 110 jobs within the network"

https://www.goethe.de/ins/us/en/ueb/prs/25084212.html

Table 10: Annual budgets and trends, 2021-23

Decrease | Increase | No change | No data

Country	Institution	2021	2023	2024	Change
Australia	Department of Foreign Affairs and Trade (DFAT)				Decrease
Brazil	Guimarães Rosa Institute (IGR)	×	×	×	No data
	Ministério das Relações Exteriores	×	×	×	No data
Canada	Global Affairs Canada			×	No change
China	China Cultural Center & CNTA	×	×	×	No data
	Confucius Institutes	×		×	Increase
European Union	EEAS				No change
	EUNIC cluster network	×	×	×	No data
France	AEFE			×	Increase
	Agence française de développement (AFD)	×	×	×	No data
	Alliances Françaises Foundation	×	×	×	No data
	Campus France			×	No change
	Institut français			×	No change
	SCAC			×	No change
Germany	DAAD				Increase
	GIZ	×	×	×	No data
	Goethe Institut				Decrease
	ifa			×	No change
India	ICCR				Increase
	Ministry of External Affairs	×	×	×	No data
Italy	Dante Alighieri	×	×	×	No data
	Directorate or Public and Cultural Diplomacy	×			Increase
	Istituto Italiano di Cultura	×	×	×	No data
Japan	Japan Foundation	×	×	×	No data
	Japan House	×	×	×	No data
	MOFA			×	Decrease
Portugal	Instituto Camões	×	×		No data
	MFA	×			Increase
Republic of Korea	Korea Foundation	×	×	×	No data
	Korean Cultural Centres	×	×	×	No data
	MFA		×		No change
Russia	MFA	×	×	×	No data
	Rossotrudnichestvo	×	×	×	No data
	Russkiy Mir			×	Increase
Saudi Arabia	MOFA	×	×	×	No data
Spain	AECID				Increase
	Instituto Cervantes				No change
	MFA				No change
Turkïye	MFA			×	No data
	Turkish Maarif Foundation	×	×	×	No data
	Yunus Emre Institute	×	×	×	No data
UAE	MOFA	×	×	×	No data
UK	**British Council**				Decrease
	FCDO				Decrease
USA	Bureau of Educational and Cultural Affairs (ECA)				Decrease
	State Department				Decrease
	USAID				Increase

Geography

The broad picture of countries' overseas presence does not appear to have changed substantially since our previous report in 2022. France remains the country with the largest global footprint, largely thanks to the number of Alliances, putting it well ahead even of countries that achieve near-global coverage by working through their extensive Embassy networks, rather than through dedicated Cultural Institutes. Signs of how traditional definitions of location and geography are being challenged by the digital include initiatives to reach global audiences through innovative, bottom-up, initiatives such as Hallyu clubs (Korea). Others achieve global reach through partnerships (China).

Patterns of geographical locations reflect:

- History: global activity by wealthy post-colonial and post-Cold War powers (e.g. USA, Russia, UK, France, Spain).
- Focus on neighbourhoods (almost everybody else).

While the figures below are as accurate possible, they do not provide a complete picture as:

- In some cases, co-location can occur, for example, where an Embassy includes a cultural space.
- The question of spatial location is transformed by the use of digital in relation to the geographical distribution of Cultural Institutes. Digital brings opportunities for wider reach, accessibility, and personalised experiences, both within countries, and between countries – for example, it offers the potential to reach people who are not able to access Cultural Institutes which tend to be located in capital cities. It also raises questions of its own about spatial distribution, especially in countries which lack digital infrastructure or budgets for technology.
- Related to the digital, network effects[49] can have a significant impact on the geographical reach of educational and cultural activities, both positively and negatively. These are increasingly important but were beyond the scope of this study.
- We were also not able to carry out a full analysis of the ability of different organisational models to reach a variety of locations *within* countries. Countries that work through Embassies or physical institutes in capital cities only, are competing for influence with countries (France, China, USA) with more distributed in-country networks and locations.
- Some countries work through intermediaries and partners. These include NGOs, universities, businesses, and were not possible to map in this study. A good example of how countries work innovatively through intermediaries are Korea's Hallyu clubs.[50]

[49] The phenomenon where the **value and reach of a programme increases as more people participate.** Online learning and cultural exchange programmes can deliver network effects for example by connecting individuals and communities through online platforms to foster intercultural understanding and appreciation.

[50] Hallyu clubs are a decentralised network, often organised at the local level, by fans or enthusiasts. There is no single organisation or registry that tracks their establishment or activities. There were some 1,700 such clubs, with more than 178 million members at the end of 2022. (11th Global Hallyu Status yearbook, sourced from Korea.net.)

Table 11: the geography of soft power: the top 30 and bottom 30 countries where all the comparators in the sample are active. The patterns of activity mostly reflect historical decisions. The relative lack of presence in Africa, Oceania (small island states) is notable.

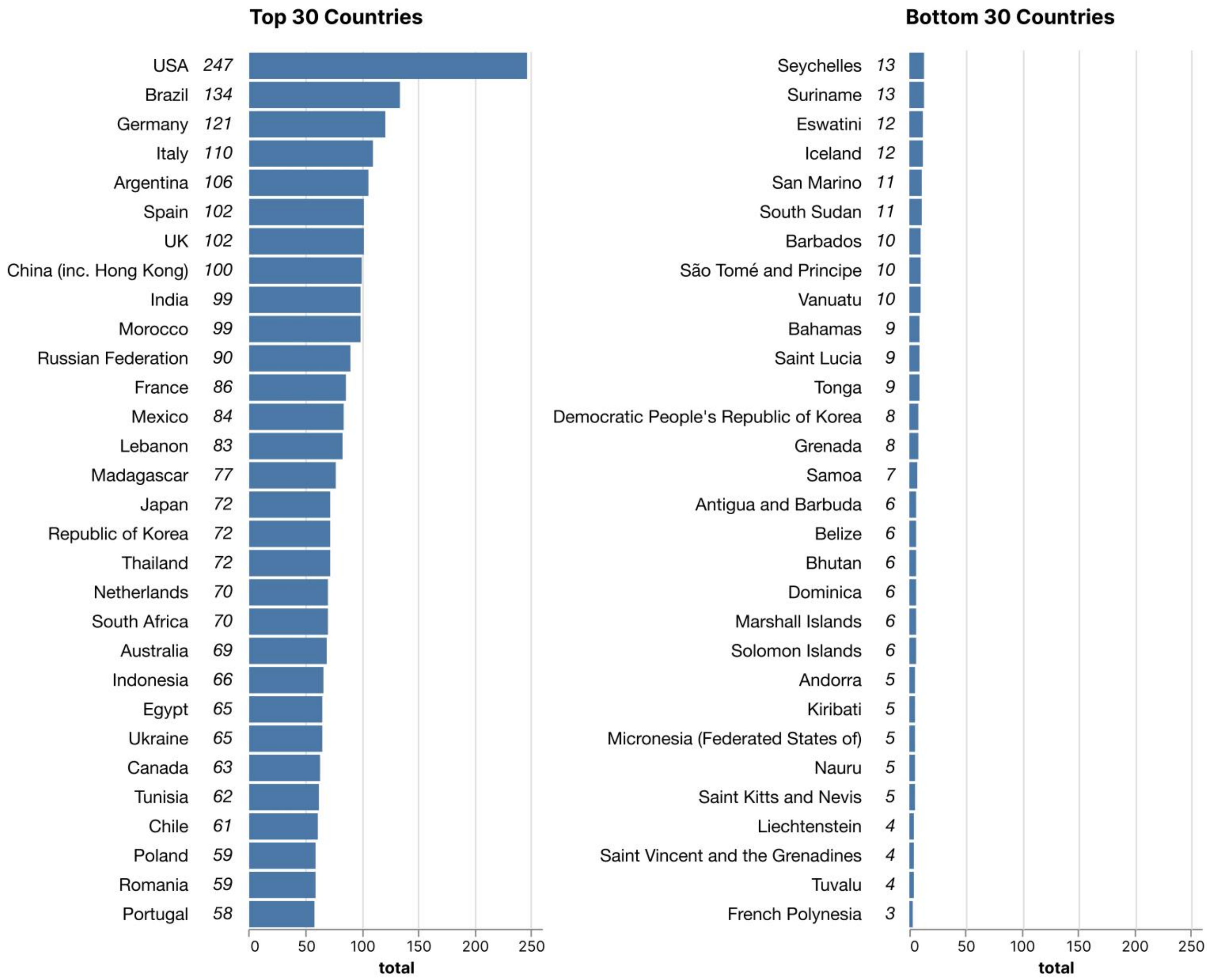


Table 12: Total scale of soft power infrastructures (physical locations) of countries in our sample:

Sending Country	Ministries (Embassies)[51]	Analogues	Outliers	Total number of overseas locations
Australia	126			126
Brazil	132			132
Canada	133			133
China	176	495 Confucius Institutes based in universities	66 Cultural Centres	737
European Union	137 EEAS delegations	123 EUNIC Clusters		260
France	133 SCAC (based in 90% of embassies)	848 Alliances 191 Campus France 186 Institut français	542: AEFE 66: AfD	1,966
Germany	153[52]	47 DAAD 150 Goethe-Institut	110: GIZ	460[53]
India	155	36 ICCR		191
Italy	119	97 Istituto Italiano di Cultura 81 Dante Alighieri		297
Japan	193	26 Japan Foundations 3 Japan House		222
Portugal	80	16 Instituto Camões Cultural Centres		96

[51] 'Embassies' does not include Consulates.
[52] Embassies are not included as Germany works through partner organisations.
[53] Germany total includes 2 ifa locations, both in Germany.

Republic of Korea	187	7 Korea Foundations 35 Korean Cultural Centres		229
Russian Federation	150	84 'Russian Houses'[54] 86 Russkiy Mir Centres		320
Saudi Arabia	94			94
Spain	194	74 Instituto Cervantes	16 AECID Cultural Centres	284
Türkiye	131	45 Maarif Foundation 58 Yunus Emre Institute		234
United Arab Emirates	99			99

A comparison of the number of analogues (excluding embassies, development agencies and other outliers) to the British Council shows that France has the largest global footprint. As indicated above, the nature of that footprint varies from country to country.

[54] Rossotrudnichestvo

Table 13: number of locations of organisations that are broadly analogous to the British Council:[55]

Country	Cultural Institutes
France	1,225
United States of America	554
China	495
Germany	197
Italy	178
Russia	170
United Kingdom	168
European Union	123
Türkiye	103
Spain	74
Republic of Korea	42
India	36
Japan	29
Portugal	16
Australia	0
Brazil	0
Canada	0
Saudi Arabia	0
United Arab Emirates	0

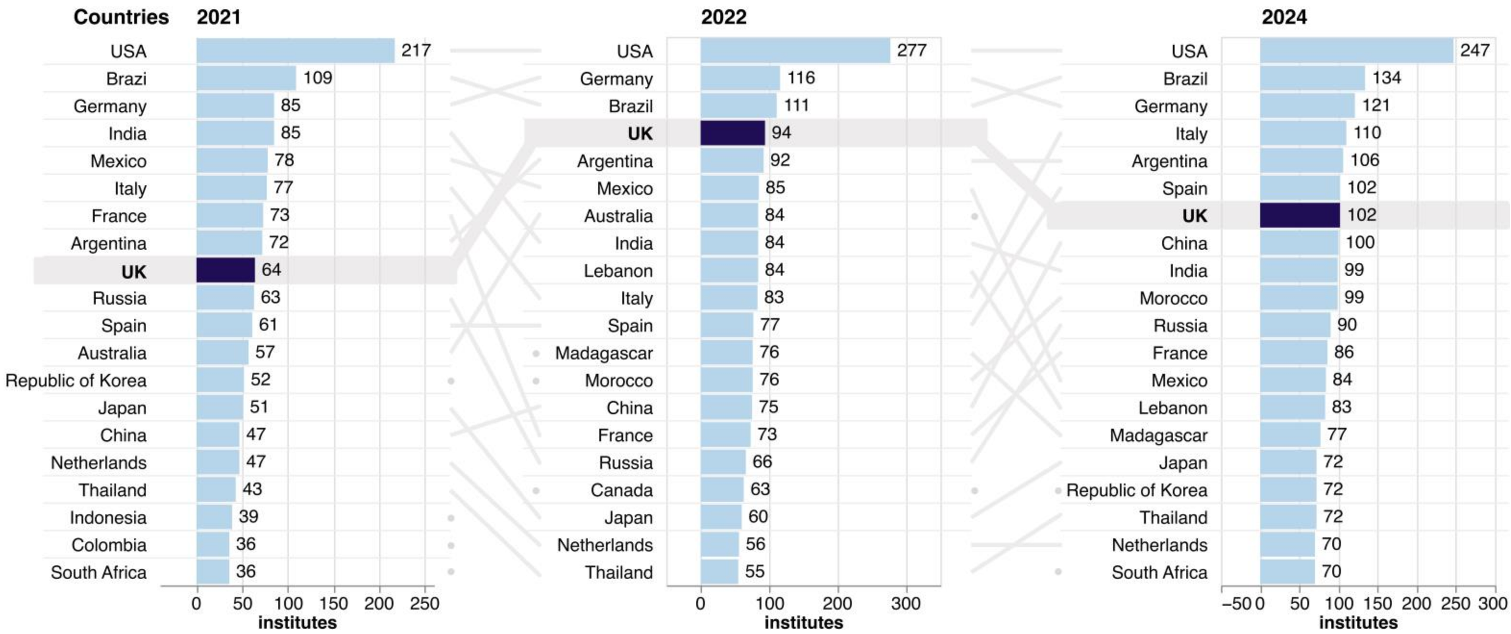
The distribution of the main host countries for the soft power institutions of others reflects the geopolitical actors of the twentieth century – most of the countries in our study are in the top 20:

[55] Excluding embassies and development agencies.

Table 14: top 20 target countries:

Destination country	2024
United States of America	247
Brazil	134
Germany	121
Italy	110
Argentina	106
Spain	102
United Kingdom	102
China	100
India	99
Morocco	99
Russian Federation	90
France	86
Mexico	84
Lebanon	83
Madagascar	77
Japan	72
Republic of Korea	72
Thailand	72
Netherlands	70
South Africa	70

Table 15: Changes in locations since 2021: while there have been some changes, it is hard to draw conclusions particularly given the impact of the pandemic (some changes seem to have been temporary).



The figures for geographical distribution between years relate to different samples of countries, which explains some of the variation. The figures nevertheless represent a high-level snapshot of a changing world situation. More work would need to be done to explain these changes, although the pandemic undoubtedly had an impact, but as geographical locations are mostly long-term infrastructural investments, they cannot be expected to vary significantly. There are indications, however, that change is starting to impact on locations, in terms of plans to secure more return from overseas infrastructure, changed priorities for engagement, and the need to reduce expenditure through closures. It remains to be seen what form will take, although it appears that countries are looking at *how* assets are used, rather than investing more in estate:

- Portugal is considering extending the geographic coverage of their strategy for External Cultural Action to all the countries where there is a diplomatic and consular presence.[56]
- The USA has a strategy for *"modernizing and increasing the operational and programming capacity of American Spaces and American Corners throughout the world, including by leveraging public-private partnerships. Also by providing opportunities for US businesses and NGOs to use the spaces."*[57]
- Germany is strengthening its commitment in Central and Eastern Europe, the Caucasus, the South Pacific and the central part of the USA. This realignment cannot be achieved without making cuts to the network elsewhere including the closure of nine of the current 158 institutes: Bordeaux, Curitiba, Genoa, Lille, Osaka, Rotterdam, Trieste, Turin, Washington and the Strasbourg liaison office. The changes also involve

[56] Speech by Minister of Foreign Affairs João Gomes Cravinho 6 Jan. 2023.

[57] National Defense Authorization Act for Fiscal Year 2024.

the downsizing or merging of structures as well as the relocation of presences to cheaper properties.[58]

Digital

The brief for this report asked us to report on the digital reach of the British Council's comparators. This proved impossible to deliver, due to lack of data.[59] In addition, digital reach as a measure of comparative performance has a number of limitations. While measures of website traffic, social media followers, or app downloads, offer valuable insights into an organisation's online presence and potential influence, they have serious limitations as measures of organisational performance, principally:

- *A focus on quantity, not quality*: high reach doesn't necessarily equate to meaningful engagement or positive brand perception. Fake accounts, bots, or even purchased followers can inflate numbers without reflecting genuine interest or interaction.
- *Reach doesn't capture impact*: measuring just reach doesn't assess the impact of those interactions.
- *Comparisons can be misleading*: comparing reach between organisations with different target audiences and aims can paint a false picture.
- *Reach does not measure sentiment*: reach does not tell you if the sentiment about an organisation is positive, negative, or neutral. Negative interactions and online complaints can damage your reputation even with high reach.

Given these challenges and the lack of data, we took a different approach, and used the data we did have to compare organisations in relation to our assessment of their digital maturity. To do this, we used the levels in the Google and Boston Consulting Group Model: [60]

- *Nascent:* Basic digital presence, limited awareness of digital opportunities.
- *Emerging:* Embraces some digital initiatives, starts collecting data.
- *Connected:* Integrates digital across several functions, leverages data for insights.
- *Multi-moment:* Continuously innovates with digital, personalises and anticipates customer needs.
- *Optimised:* Fully integrates digital into core business, agile and adaptable to change.

That enabled us to assess (albeit somewhat subjectively) relative levels of digital adoption and transformation. Our impression was that levels of digital maturity were relatively modest across the whole sample, with Ministries tending to be further ahead than analogues or outliers, and with the US State Department standing out in a leadership position.

[58] https://www.goethe.de/de/uun/prs/pma/p23/goethe-institut-beschliesst-um.html

[59] 38 of the organisations surveyed provided no information on their digital reach.

[60] Digital maturity is the measure of an organisation's ability to create value through digital. It is also a key predictor of success for companies launching a digital transformation. See: https://apticconsulting.com/blog/an-introduction-to-googles-digital-maturity-framework-dmm/

Table 16: Summary of levels of digital maturity[61]

Maturity Level	Comparator Institutions
Optimised:	3
Multi-moment:	3
Connected:	20
Emerging:	14
Nascent:	7
Grand Total:	**47**

The British Council was currently in the commonest 'connected' category.[62] Countries in the 'multi-moment' category were France and Germany,[63] and the UK (FCDO) and the 'optimised' category only applied to the USA.[64] A number of countries and their institutions were in a state of transition, developing their digital plans as part of initiatives to build resilience. An interesting feature was the focus of some organisations on going beyond their organisational concerns into shaping the digital environment, whether through capacity-building in developing countries, or a focus on issues such as the 'digital commons'.[65]

[61] The table shows the 5 stages of digital maturity ascending from 'nascent' to 'optimised'

[62] See table 1, page 4.

[63] This ranking was due to the digital maturity of the AfD and the GIZ, rather than to analogue organisations in these countries.

[64] The USA has had a "Data-driven Public Diplomacy" programme since 2014, and an Enterprise Data Strategy since 2021.

[65] Digital commons can refer to resources shared and managed collectively by a community. These resources can be things like data, information, culture, knowledge, and technology.

Analysis

Priorities for analysis

The British Council asked us to consider three main topics:

- Resources
- Geography
- Digital

Our take on these issues based on our findings is necessarily somewhat subjective due to lack of data. We do, however, draw some emerging conclusions.

Resources

We noted the issues of making robust comparisons of resource levels and noted the UK's position vis-à-vis other countries in the sample in the Findings section. Further analysis of the levels of state support for 'soft power' activities – where data were available - suggests that:

- There are static or declining levels of expenditure mostly in Western countries (Australia, Germany, Japan, UK, USA). This reflects changing priorities as in France, whose 'Soft Power Roadmap (2021)[66] notes that universality of presence does not equate to uniformity and there need to be clear priorities, namely Francophone Africa, and, as already noted, in Germany.
- However, there are increases to individual institutions in some Western countries (France, Germany, Italy, Portugal, Spain)
- Where there are increases to some budgets, these are for comparators which focus on education (France AEFE, Germany: DAAD) or on development (Spain: AECID, USA: USAID).
- There also appears to be increases in the budgets of authoritarian states, though because of the limited availability of data this is not certain.

The resource position of the British Council (and some of its key comparators) needs to be considered in the light of the overall geopolitical and geoeconomic context in which it operates. Other countries are increasing resource in key areas of activity such as competition for international students (France, Germany). They are also investing in high-impact arts and cultural platforms and activities which can have transformational impacts on reputation and perceptions (the Gulf States, South Korea). There is also a need to promote and defend our values to compete for influence with states which weaponise culture. All of this takes resources: not just money, but also necessary human and knowledge resources.

[66] https://www.diplomatie.gouv.fr/IMG/pdf/feuille-de-route-influence_print_dcp_v6_cle8f2fa5.pdf

Geography

The main issues in relation to geographical location are:

- *The impact and potential of the digital:* as already noted, the implications of the digital for the spatial organisation of activities are still in the process of being worked through but are already profound in terms of reach and models of engagement. The future impact of AI has been noted by several Ministries and analogues but is not yet a major factor that impacts on their decisions about location, though that may change.
- *Resources:* cost-cutting and transformation programmes are leading to the closure of institutes (e.g. Goethe-Institut), and a substitution of digital activities as a means to maintain presence at lower cost.
- *National interests:* while countries' policy priorities are changing fast, this is not yet resulting in major changes to geographical footprints. The reasons for this – in addition to an expected lag between policy and implementation – are not clear. There are signs, however, that regionalism, where political power and influence is exercised in specific geographic regions, is becoming more important, as is the desire for the benefits of soft power to be translated into national development programmes (Gulf states).
- *Business models:* traditional significant physical presence in prominent representational buildings in capital cities, versus more distributed, less visible, smaller-scale models, often based on partnerships with NGOs or locally based organisations. Some countries (e.g. France) combine both approaches.

Digital

After a peak level of online activity during the pandemic, there are clear signs of a return to a more sustainable level of activity that is more strategic, more data-driven, more integrated, and more supportive of a range of activities, including local-global interfaces, contesting false narratives, engaging with diverse populations, with a higher level of digital maturity.

Policy

In addition, this report looks explicitly at how countries are responding to, and seeking to influence, the geopolitical and geoeconomic context through their soft power policies. We reviewed countries' (published) policies in order to identify the key policy drivers and how these are reflected in the strategies of the three categories of comparator.

This task posed methodological challenges. We had to rely on published data that were often partial and whose validity could not be verified. In order to avoid the risk of "rubbish in-rubbish out" as far as possible, we therefore deliberately confined ourselves to analysis only of data that was published by Governments (with clearly indicated exceptions where we took account of potential for bias[67]).

[67] A good example of our approach is where we had to rely on analyses of Russian institutions published by the Ukrainian Institute, where we relied only on the data they reproduced and not on their interpretations of it.

We also made four assumptions based on our previous studies and our reading of the context:[68]

- Countries would be reviewing their policies and strategies for 'soft power' in the light of the changing contexts.
- These would be affected by recent events: Covid-19, geopolitical and geoeconomic change, technology (especially generative AI), and uncertainty.
- The nature of countries' responses and their impact on institutions' activities would remain broadly the same as there would be a lag between policy change and implementation.
- Some change would therefore be evident, probably at high level, but the evidence from published sources would be inconclusive.

Our findings confirmed that these assumptions were broadly correct and that general trends relevant to the UK's decision-making were emerging. We also note that further work is required.

Trends since 2022

This report follows a similar comparative study: *Soft power and cultural relations: A comparative analysis*, in 2022. [69] This report updates the work of 2022 and identifies trends: what has changed as the global context has evolved, and what has stayed the same; what are the new challenges and opportunities for the British Council and its comparators.

The key themes in the activities of comparator institutions identified in the 2022 report were:

- *Digitalisation* - potentially the most significant trend as institutions were responding to COVID-19 by accelerating their turn towards digital delivery.
- *New actors* - digitalisation was enabling a greater importance for informal actors (even individuals). Sub-national actors were also increasingly important.
- *Values* **-** countries, often those with illiberal regimes, were increasing their soft power activity.
- *Audiences* - countries are engaging in soft power and cultural relations with their domestic populations, reflecting the need for public support for foreign policies, and a recognition that populations include foreign (inward) diasporas.
- *Activities* **-** sport and identity politics were playing a major role for most countries at the policy level.

In 2024, we have noted in relation to these themes:

- *Digitalisation* **–** as the pandemic has receded, digital seems to be declining in salience as changes are mainstreamed.

[68] This report is our third comparative study, following: Soft Power and Cultural Relations in a Time of Crisis (2020), and Soft Power and Cultural Relations: a Comparative Analysis (2022). We also considered two other comparative reports commissioned by the British Council: Influence and Attraction (2012), and Soft Power Superpowers (2018). Given the pace of change in the world, it made most sense to us to chart changes and trends from the 2022 report.

[69] https://www.britishcouncil.org/research-insight/soft-power-cultural-relations-comparative-analysis

- New actors – there were few signs of new actors continuing to gain ground, rather there were indications of greater centralisation and co-ordination of the activities of existing institutions.
- Values – there are signs of a shift towards activities that further national policy and economic interests and less commitment to the global order and ideas of the common good (though global challenges remain a priority for some).
- Audiences - countries continue to engage more with their domestic populations to explain themselves and secure support. Diaspora populations continue to grow in importance.
- *Activities* **-** sport was not included in the scope of this study. Higher Education emerged as one of two main areas of activity. The other was the weaponisation of culture and memory by some countries in pursuit of identitarian or conflict goals.

What has changed

In 2024, we noted the following broad changes. There were clear signs of increasing priority being given to:

- *National interests:* moves to align delivery more closely to foreign and economic policy through enhanced arrangements for co-ordination at the national level and a shortening of the arm's length as governments exert more control over delivery bodies. This manifests also through overtly competitive measures against other countries (e.g. USA and China); a more interest-driven approach to ODA; strategic focus on specific topics or geographies (e.g. France in Africa), and less interest in global challenges and multilateralism.
- *The promotion of national identity and its use as justification for assertive behaviour*: this is a complex and multifaceted issue and can be positive as well as negative. There is a spectrum which ranges from the desire to preserve cultural heritage for future generations, to appeals to national identity that are misused to justify historical injustices or present-day assertive actions. It crosses the border between foreign and domestic policy when it involves memory politics and historical narratives, used to justify assertive actions in the present (e.g. in ongoing tensions between Russia and neighbouring countries regarding interpretations of World War II history), and in which Russian Cultural Institutes in this study are actively involved.
- *The relationship between domestic and foreign policy agendas more generally:* more emphasis on delivering economic benefits to participating sectors, especially Higher Education and Cultural and Creative Industries.
- *Migration and mobility:* issues at the intersection of foreign and domestic policy include tensions between the drive to attract foreign students versus the desire to restrict immigration.

There were clear signs of decreasing priority being given to:

- *The global order*, *the common good, and multilateralism*: this is the flip side of the trend towards national interests. With some exceptions (Portugal, Spain), there were many fewer indications from published sources of commitment to Agenda 2030, or even to address issues such as climate change which will impact on the planetary system (i.e. on everyone).

- *The idea of 'soft power' itself:* the concept of soft power has always been contested, but in 2024 some influential commentators and institutions are asking whether the concept is still relevant. For example, the "Roadmap for France's soft power" includes the comment that *«Il n'y a plus de soft power, il n'y a plus que du hard»* (There is no longer any soft power, only hard).[70] This tendency is exacerbated by the fragmentation of online spaces into niches of like-minded actors.

What stays the same

- *Activities:* there were very few signs of changes since 2022 in the areas of operation of the British Council and its comparators. The main areas of activity and the relevant sectors have not changed, and countries and institutions continue to operate – albeit more competitively – in the same ways.

[70] https://www.diplomatie.gouv.fr/IMG/pdf/feuille-de-route-influence_print_dcp_v6_cle8f2fa5.pdf

Appendix A: Template for a soft power baseline

Proposal

Monitoring how countries develop and utilise soft power can provide useful insights into changing global power dynamics and foreign relations trends for the British Council, and for its partners and stakeholders.

This proposal is to **develop a baseline** for monitoring. A baseline is essential as it:

- *Provides a starting point for comparison*: baseline metrics, enable future comparative measurements of soft power over time.
- *Accounts for normal fluctuations*: a baseline helps take normal ups and downs into account, enabling assessment of true change in overall trends, and avoiding false conclusions.
- *Aids in goal setting***:** if the desire is to increase soft power, a baseline provides information on where soft power started so that benchmarks and goals can be established for desired growth. Policy decisions and investments in soft power can then be evaluated based on how much they move the needle from the baseline.
- *Enables impact evaluation:* if particular strategies or events were meant to boost soft power, having a pre-existing baseline makes it possible to isolate and evaluate their specific impact.

Tracking soft power over time without a baseline would provide far less actionable information.

The baseline

We suggest structuring the baseline across two dimensions: **sort power infrastructure** and **soft power assets.** These terms refer to related concepts, both are components of a country's overall soft power, but they are separate:

- Soft power **assets** are the **specific resources** a country possesses that contribute to its soft power, such as its culture, values, policies, brands, media, universities, etc.
- Soft power **infrastructure** refers more broadly to the **systems, networks, platforms and relationships** a country has that allow it to effectively project its soft power assets and wield soft power influence.

Assets are the content; infrastructure is the conduit. Assets can exist independently, but infrastructure requires intentional cultivation to deploy assets.

Assets are the tangible and intangible resources a country has available, while soft power infrastructure describes how a country strategically uses platforms, relationships and networks to actively project those assets and exert influence.

Both are important for fully realising and optimising a country's soft power potential, and while there are some gaps, both can be outlined using data from the current project.

Rationale for this approach

A rationale is needed as we recognise that this proposed approach is, in some respects, novel. Having now carried out three comparative studies for the British Council, and analysed global trends, we believe that effective soft power policy and strategy planning would benefit from a framework which offers more explanatory value than traditional approaches, and 'joins the dots' in connecting what is happening now, to deeper and more fundamental developments.

That would assist in integrating soft power strategy analysis more firmly into foreign policy development – as suggested in the Integrated Review Refresh 2023[71] with its call to: *"deepen relationships, support sustainable development..., and tackle shared challenges"*, to *"...act now but to plan for the long-term"* and *"invest in the UK's unique strengths"* which include its soft power.

Considering the concepts of soft power infrastructure and assets separately starts to provide that framework, by enabling analysis that systematically assesses the foundations and tools countries are cultivating to project their soft power in a more contested and competitive world.

Using the concept of 'soft power infrastructure', we can analyse the long-term underlying conditions and systems that *enable* the generation of soft power, such as political values, culture, and economic contexts. Our comparative studies have found that while these factors were previously slow-moving, they are increasingly driving change in often unpredictable directions. The 'soft power assets" of a country are the *specific resources*, that may be outside direct state control, that can be leveraged for persuasion and attraction, like media, culture, education programmes, etc.

Monitoring based on these two conceptual categories also allows for deeper analysis of how specific conditions and assets gain or lose prominence and change the makeup of national soft power over time. The rationale is to build a systematic framework to observe significant trends and transformations in how countries cultivate and employ soft power capabilities in service of foreign policy and global influence objectives.

Template

Our suggested outline of a template for a baseline survey of countries' soft power infrastructure and assets would consist of:

- *Introduction*
    - Background on the concept of soft power and why it is important
    - Purpose and goals of the baseline survey
    - Soft Power Infrastructure
    - *Quantitative data:* key statistical indicators, such as:
        - Geoeconomic context
        - Demographic data e.g. on diaspora populations

[71] https://www.gov.uk/government/publications/integrated-review-refresh-2023-responding-to-a-more-contested-and-volatile-world

        - Government spending on ‘soft power’ programmes
        - Number of cultural centres and institutions promoting culture/language
        - Geographical distribution of cultural centres and institutions
        - Countries' trade balance in cultural and creative industries.[72]
    - *Qualitative data:*
        - Geopolitical context
        - [Countries’] Values, Cultures
        - [Countries’] Policies
- *Soft Power Assets*
    - *Quantitative data:* key statistical indicators on international participation and engagement of relevant sectors, such as:
        - Higher Education: especially flows of international students
        - TVET
        - School Education
        - Cultural and Creative Industries
        - Media
        - Arts
        - Museums
        - Heritage
        - Language
        - Science
        - Sport
        - Civil society
        - Digital platforms
        - Data collected by the British Council and comparators (where available)
    - *Qualitative data:* from interviews with key practitioners and stakeholder groups. Qualitative approaches are particularly important in soft power which deals with the more human-centred aspects of foreign policy, in times of change, and in in contexts where valid and reliable quantitative data are missing, as they offer:
        - *Building trust and rapport:* interacting respectfully with cultural informants builds necessary trust and rapport. Surveys rely on sampling.
        - *In-depth understanding* of attitudes, beliefs, emotions, behaviours, etc..
        - *Enhanced contextual insight and relevance*: this is particularly important in soft power.
        - *New and unpublished insights* and discovery.
        - *Subjective understanding*: qualitative methods access the subjective and socially constructed meanings people assign to their experiences.

[72] In the UK for example, these figures are collected for DCMS sectors economic estimates.

        - *Flexibility:* Qualitative studies can evolve as new information emerges.
        - *Cultural nuance:* differences in meanings, values, customs, behaviours, attitudes, and experiences.
- *Analysis*
    - Statistical analysis of quantitative indicators over time and versus benchmark countries.
    - Coding and thematic analysis of qualitative interview data.
- *Conclusion*
    - Summary of key findings on countries' soft power assets and infrastructure
    - Recommendations for improving soft power strategy based on addressing gaps and weaknesses identified.

This covers the key components for assessing the baseline soft power landscape in a given country using a mixed methodology. The specific indicators, stakeholders, and questions would then need to be tailored to the particular country context.

Appendix B: Abbreviations

Abbreviation	Full title
AECID	Agencia Española de Cooperación Internacional
AEFE	Agence pour l'enseignement de français à l'étranger
AFD	Agence Française de Développement
CCI	Cultural and Creative Industries
CNTA	China National Tourism Administration
DAAD	Deutscher Akademischer Austauschdienst
DAC	Development Assistance Committee
DFAT	Department of Foreign Affairs and Trade
ECA	(Bureau of) Educational and Cultural Affairs
EEAS	European External Action Service
EU	European Union
EUNIC	European Union National Institutes of Culture
FCDO	Foreign, Commonwealth and Development Office
GDP	Gross Domestic Product
GIZ	(Deutsche) Gesellschaft für Internationale Zusammenarbeit
GNI	Gross National Income
HE	Higher Education
ICCR	Indian Council for Cultural Relations
IFA	Institut für Auslandsbeziehungen
IHE	International Higher Education
IT	Information Technology
MFA	Ministry of Foreign Affairs
MOFA	Ministry of Foreign Affairs (Japan)
ODA	Official Development Assistance
OECD	Organisation for Economic Co-operation and Development

SCAC	Service de Coopération et d'Action Culturelle
SDG	Sustainable Development Goal
STEM	Science, Technology, Engineering, and Mathematics
UAE	United Arab Emirates
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organization
USAID	United States Agency for International Development