

# WALES SOFT POWER BAROMETER 2018

Measuring soft power beyond the nation-state



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## EXECUTIVE SUMMARY

### Soft power, the ability to use attraction and persuasion to achieve foreign policy objectives, is – at its core – a concept of International Relations.

As those familiar with the study of IR know, the key unit of analysis for the discipline is the nation-state. This fact sits rather awkwardly with the underpinning principles of soft power. One of which is the recognition that non-state actors now operate as a viable force in foreign affairs, capable of influencing outcomes outside the traditional models of diplomacy. Indeed, this report is very much motivated by this principle – namely that nation-state-level governments increasingly need to share power with non-state actors. Moving beyond the nation-state as the unit of analysis, this study focuses on the sub-nation-state level of authority, looking at the role of regional governments\* in developing and leveraging soft power towards the advancement of their international objectives.

There are two primary forces that are pushing regional governments into the realm of foreign affairs. The first is globalisation and the increasing interdependence brought on by international economic relationships. Regions must compete for capital, talent, tourists, and exports. Increasingly, they also need to find their voice in the formulation of international norms, rules, and regulations, as well as contribute to the solutions of major global challenges like climate change.

The second force coaxing regions onto the global stage is the diffusion of power, which is moving away from nation-state-level governments towards non-state actors, like regions and cities. As a result, engaging with international audiences is now more of a necessity than a luxury. At the same time, the diffusion of power away from the nation-state affords regions the space, autonomy, and platforms to engage meaningfully on a global scale.

While there has been a growing body of academic research on the practice of ‘paradiplomacy’ (diplomacy conducted by non-nation-state governments) for some time, much of it is conceptual in nature. The field has produced definitions and even models that give structure to the ways in which regional governments practice public diplomacy and engage with international audiences outside of the traditional nation-state driven diplomatic channels. But research in this space has not moved much beyond the conceptual phase.

The aim of this publication, however, is to push the subject of regional government paradiplomacy into an empirical phase of research through an analysis of soft power. By adapting existing methodologies for the measurement of the soft power resources of nation-states, this research project builds a new framework for assessing the soft power of ten different regions. This framework takes the form of a composite index, which allows us to produce a comparative snapshot of the soft power resources by calculating a single score – derived from over 60 metrics – for each region.

The results of the index would suggest that regions with a long established tradition of non-state nation building – through political, cultural, and linguistic means – tend to be those that enjoy the greatest reserves of soft power. However, breaking down the index into its constituent parts, provides some insights into where and how regions can build on their strengths and address their soft power shortcomings.

In addition to providing a comparative assessment of regional soft power, a core objective of this report is to look specifically at Wales’ unique set of soft power assets, with a view to developing a set of actionable recommendations.

Taken together, the objective and subjective data for Wales report a mixed performance. There are some clear strengths on which Wales can build, particularly in terms of the favourability generated by the appeal of its sporting culture, but more needs to be done to lift overall levels of awareness.

Our recommendations can be found in Chapter 6. While we aim these recommendations primarily at the Welsh Government, we must recognise what governments can and should do, as well as what they cannot and should not. The majority of soft power resources sit outside of the direct control of governments.

When governments overextend themselves in the hope of strengthening their soft power the actual effects often differ from the intended effects.

There are areas where governments can make a positive impact, as we detail in the report.

However, it must be emphasised that successful government interventions involve working in collaboration with stakeholders and partners outside of government. This holds true not just for Wales, but for all regional governments.

It is our hope that the following report will serve as a useful benchmarking tool for governments and researchers alike. Moreover, we hope it inspires more research in the field, and advances the debate on how regions can assert more control over their international affairs through an improved understanding and use of soft power.

\*On the terminology used in this report, ‘regional government’ and the shortened form ‘region’ are used to capture a broad range of administrative authorities that exist at the level below the nation-state. It would be accurate to describe Wales, Scotland and Northern Ireland as ‘countries’ or ‘nations’ within the UK. However, in the particular context of International Relations (and to allow for effective comparative analysis), ‘regional government’ and ‘region’ are the most appropriate terms.

# 1. INTRODUCTION

It was almost 30 years ago that Joseph Nye first coined the term that perfectly captured a foreign policy practice that has existed for centuries, yet remained nameless and poorly understood. When Nye defined the term “soft power” in 1990,<sup>1</sup> he effectively ignited a new branch of International Relations studies.

Not only has the concept generated much scholarly activity, it has caught the imagination of forward thinking diplomats, policy makers, and world leaders, the savviest of which have made soft power central to their navigation of 21<sup>st</sup> Century foreign policy.

The appeal of soft power is manifold, but at its core, its utility lies in being both descriptive of how global power has changed during the transition years from the late 20<sup>th</sup> to the early 21<sup>st</sup> Century, as well as prescriptive in what states need to do to respond accordingly. Another element of soft power’s appeal is its democratic nature. It cannot be bought, but must be earned through values and demonstrated behaviour. True, hard power and soft power are complementary, and those countries that enjoy the largest reserves of soft power tend to command significant hard power capability as well. But hard power assets do not guarantee success in developing soft power resources and converting them into influence.

As it does not rely on the use or threat of force, soft power is not the sole property of the nation-state. Non-state actors – particularly regions and cities – can cultivate and deploy soft power; though doing so is not necessarily straightforward or easy. Indeed, developing and executing effective foreign policy has never been a simple task for state and non-state actors alike, but as has been argued in *The Soft Power 30* series of reports,<sup>2</sup> that task has grown more complex since the turn of the century.

That complexity is manifested in an increasingly multi-polar world, a proliferation of foreign policy actors, and growth in the number and reach of communications platforms available to wield influence through campaigns and information.

Three global mega-trends serve as the underlying forces driving greater complexity in foreign affairs. The first of these mega-trends is geo-political uncertainty, which stems largely from two earthquake elections in 2016 that took place in the US and UK. The fallout from both elections has called into question the stability of the current global order governing trade and security, as well as the resilience of long-standing, seemingly unshakable alliances. The second mega-trend is the digital revolution continuing at pace. The arguments and implications of this trend for foreign affairs are well rehearsed, but the key point is that the proliferation of publishing and communications platforms is both a daunting challenge and tremendous opportunity for state and non-state actors to shape foreign policy outcomes.

The third mega-trend – and without question the most relevant for this study – is the diffusion of power. This trend has been underway for a number of decades,<sup>3</sup> and is driven primarily by the forces of globalisation and the economic rise of Asia. The diffusion of power can be seen in two different ways; the first pertains to geo-political power, while the second governs state vs non-state power structures. First, power is drifting from West to East,

as the centre of economic and political gravity tracks away from the Atlantic toward the Pacific.<sup>4</sup> Second, power is devolving away from nation-state-level governments altogether, and moving toward non-state actors. This second component of the diffusion of power is critical for understanding the changing role of regional governments in global affairs.

In this new context, a host of non-state actors have joined the global fray, each working to shape events in the hope of bending outcomes to their own values, beliefs, and priorities. These newly empowered non-state actors include multi-lateral organisations, NGOs, philanthropies, multi-national corporations, civil society groups, trade unions, and – perhaps most important – sub-state governments.

Amongst this cadre of non-state actors, it is arguably regions and cities (sub-state governments) that are the best resourced, positioned, and capable of making an impact on the global stage. An example of this is the role regional and municipal governments around the world have played shaping and securing the Paris Climate Accord in 2016. Even as the Trump Administration has pulled the US out of the agreement at the federal level, a coalition of mayors and governors across the US has pledged to stick to the agreement, thus showing the ability of sub-state governments to develop and execute their own foreign policy in certain areas – sometimes in opposition to the policies of their own nation-state governments.

It goes without saying, that while regional and city governments now have more space, autonomy, and tools at their disposal to influence global events, they need to remain focused on where they can effect change, and avoid areas where they cannot. This means focusing on areas like trade, investment, tourism, culture, education, environment, people-to-people exchanges, and sport. It also means avoiding issues pertaining to defence, war, and international security. Thus, a regional government’s international remit exists almost exclusively in the context of soft power. As such,

the tools available to regional governments for shaping international affairs are those that rely on attraction and persuasion. This means a mastery of soft power is paramount for regional governments hoping to make an impact on the global stage. On terminology used for this report, ‘regional governments’ is used to capture a broad range of administrative authorities that exist at the level below the nation-state. In the context of International Relations, ‘regional government’ is the most appropriate term.

Whether nation-state or sub-state government, the first hurdle to effectively leveraging soft power in pursuit of foreign policy objectives is measurement.<sup>5</sup> Governments – state or regional – cannot deploy soft power resources unless they have a clear account of what resources they can access. Prior research that works to address the measurement challenge for nation-states does exist. Such research, however, does not exist for regional governments.

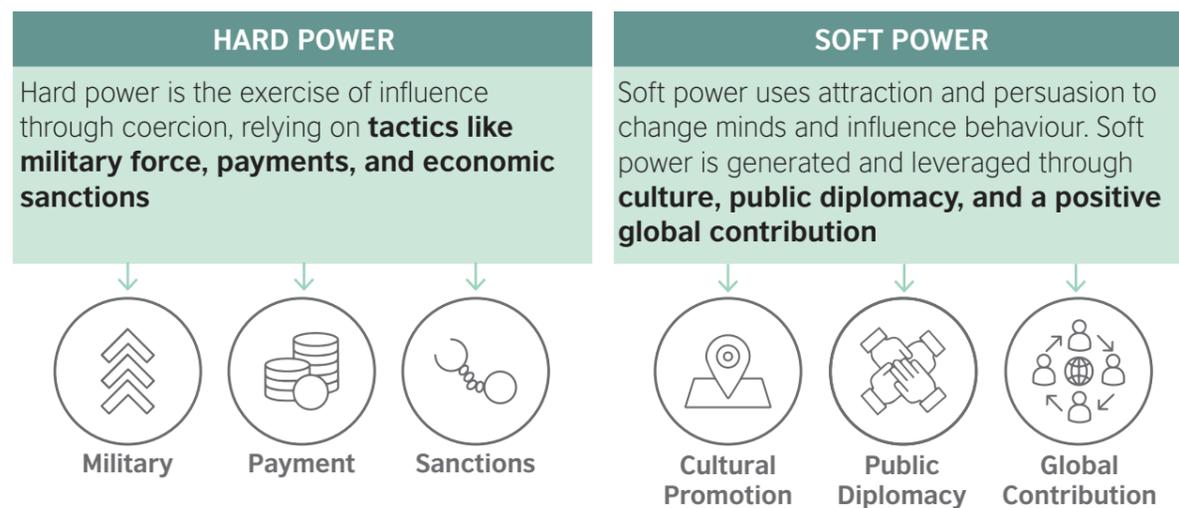
The following report attempts to address the lack of empirical study on the measurement of regions’ soft power resources. The aim, therefore, of this research is to provide a starting point for a comparative soft power analysis of some of the most recognisable – and comparable – regions around the world. We have put the focus on a set of internationally ambitious and active regional governments. This study provides a comparative snapshot of soft power for ten different regions, covering sub-state governments across the UK, Europe, Asia, North America, and Latin America. Moreover, the study puts a particular focus on Wales – dedicating more time and effort to exploring Wales’ own soft power strengths and weaknesses, and looking at how Wales might build on its soft power resources and look to better leverage the resources it already possesses.

The report gives a brief overview of soft power itself, setting it in the context of the rise of regions and cities as viable foreign policy actors. It then provides a description of the methodology used to build a composite index used to assess and

rank the ten regions included in the study according to their soft power resources. The report then gives the results of the index rankings and takes a deep-dive on the performance of Wales and implications for how the Welsh Government should respond accordingly. Finally, the report concludes with a look ahead at what future research on the soft power of regions might focus on.

Two key objectives underpin and shape this report. The first objective is to inspire further research on the measurement and use of soft power for regional governments. The second is to provide regional policy makers in general – and Welsh policy-makers in particular – with actionable recommendations on how they might make the most of their region’s soft power assets.

**HARD POWER VS. SOFT POWER**



## 2. SOFT POWER AND THE RISE OF THE REGIONS

In the new global context, shaped by the three aforementioned mega-trends, relying on military might and economic clout alone cannot deliver on all of a state’s international priorities.

Shaping global outcomes in many areas now relies on the ability to encourage collaboration and forge networks, using attraction and persuasion, rather than coercion. As Joseph Nye has previously argued, power *with* others can be more important than power *over* others.<sup>6</sup>

The fact that regional governments must rely on soft power for influence means it is worth starting from a clear definition of the concept. As the term is rooted in International Relations theory, it is best to begin there. The very concept of power, in the context of International Relations studies, has historically carried a bias towards hard power. Consequently, power tends to be framed in Dahlian terms: one actor – often a state – using its material resources to compel another state to do something it would otherwise not have done.<sup>7</sup>

Hard power is the exercise of influence through coercion, relying on tactics like military intervention, coercive diplomacy, inducements of payment, and economic sanctions. Soft power, on the other hand, is the “ability to affect others to obtain preferred outcomes by the co-optive means of framing the agenda, persuasion, and positive attraction”.<sup>9</sup>

Soft power strategies eschew the traditional foreign policy tools of carrot and stick, working instead to persuade by constructing and mobilising networks, developing and communicating compelling narratives, establishing international norms, building coalitions, and drawing on the key resources that endear one country to another.<sup>10</sup> In simple terms, “hard power is push; soft power is pull”.<sup>11</sup>

In defining soft power, it is also important to highlight its sources. Nye has previously pointed

to three primary sources of soft power: culture, political values, and foreign policy.<sup>12</sup> For Nye, when a country’s culture promotes universal values that others can readily identify with, it makes them naturally attractive.

Culture, for the purposes of soft power, captures both high-culture forms like visual art and performance, as well as popular culture like film, TV, and pop music. Political values refers to upholding individual freedoms and liberty, as well as rule of law and sound public institutions. Nye’s third source of soft power – foreign policy – can be understood as the extent to which a country – or group – is seen as making a positive global contribution. Phrased as a question, is a country a force for good or ill in the world?

*The rise of regions*

With a working definition of soft power in place, and an understanding of its primary sources, we can turn to what exactly soft power means for regions. As discussed above, power is moving away from nation-state-level governments, as more non-state actors play a role in shaping international events. While the global stage may be more crowded with new actors, the devolution of power has opened up the space required for regional governments to engage international audiences directly.

The rise of regions – as well as cities – to the global stage has come about for three key reasons. First, the nature of globalisation has brought regions and cities into more interdependent international relationships. Growing linkages between localities across borders means regions and cities have a more active interest in aspects of international

trade, the flow of foreign direct investment (FDI), and even competition for globally mobile talent.<sup>13</sup> Second, many regions with well-established self-government structures have the capacity, capability, and machinery required to engage international audiences, independently of their nation-state governments. This means regional governments are capable of setting their own international priorities and then engaging directly with international audiences to voice – and ideally deliver – on those priorities. Third, in most instances, nation-state-level governments have adopted a supportive stance on their regional governments engaging in public diplomacy activity abroad, as the goodwill generated by efforts from regional governments tends to accrue at the nation-state level.<sup>14</sup>

The reality of globalisation and the devolution of power from nation-state-level governments present both challenges and opportunities for regional governments. The interdependence brought on by globalisation, as well as heightened competition for globally mobile capital, talent, tourists, and even international students, means that regional governments now need to develop and project a clear and compelling offer to key international stakeholders. Fortunately, the concurrent trend of power diffusion has provided them with the required autonomy to do exactly that.

That the practice of diplomacy is no longer the sole privilege of nation states is a fact that has been accepted in International Relations literature for some time now. In fact, it was in the early 1990s when two International Relations scholars, Panayotis Soldatos and Ivo Duchacek, developed the concept of “paradiplomacy” – an abbreviation of “parallel diplomacy”.<sup>15</sup> Paradiplomacy simply describes the process of foreign policy carried out by sub-state governments. There are examples of regional governments that have been practicing paradiplomacy – at least on a basic level – for decades. At present 40 out of 50 US states operate international trade offices overseas. The Canadian province of Quebec opened its first international representative office as far back as the 1940s. So

as Quebec demonstrates, the practice of paradiplomacy by regional governments has been underway for decades. The key question then, is how can regional governments practice it more effectively?

In practice, for regional governments to effectively engage international audiences means they need to develop and deploy their own unique soft power assets. While there are innumerable different ways to develop soft power resources, the ability to leverage them rests on the practice of public diplomacy. The simplest definition of public diplomacy is the process of a government interacting directly with foreign publics in an effort to bring greater understanding of that government’s values, priorities, and policies.<sup>16</sup> Building on that definition, public diplomacy is generally carried out with three broad objectives in mind, according to public diplomacy scholar Jay Wang:<sup>17</sup>

1. Promoting a country’s national goals and policies;
2. Communicating a nation’s ideals, beliefs, and values;
3. Building common understanding and relationships across borders.

The first objective of public diplomacy, which pertains more to a given country’s overarching nation-state-level priorities and foreign policy, is arguably best left to the nation-state-level government. In many cases, the second and third objectives outlined above can and should be carried out by regional governments.<sup>18</sup>

Looking at the second objective, this is probably where there is the greatest overlap between nation-state-level and sub-state public diplomacy. Both central and regional governments have a role to play in communicating a nation-state’s (and region’s) ideals, beliefs, and values. Turning to the third objective of public diplomacy, this is arguably better suited to regional (and other sub-state) governments. When it comes to building direct relationships across borders, the closer one can get to person-to-person contact, the better.

Regional and local governments are not only better able to operate at a level closer to individual citizens, but often they do not carry any of the political baggage that a nation-state-level government might have.

Based on the public diplomacy objectives outlined by Wang, and knowing where regional governments are best suited to play a role, we can break down the types of assets and activities that can be leveraged through public diplomacy. For the second objective, this might include the following:

- Political values and policy
- Culture
- Heritage

For the third objective, which focuses on building relationships, a region’s public diplomacy efforts would likely include promoting the following:

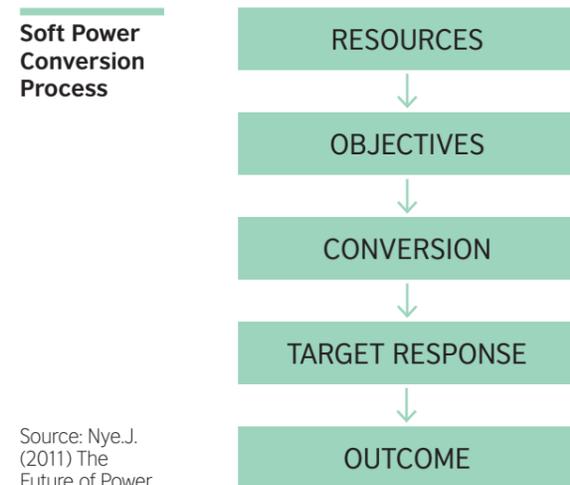
- Education
- Tourism
- Exchange programmes
- Business partnerships

While regional governments are limited to soft power in their efforts to meet their international objectives, this still leaves them with a number of tools to engage with global audiences and build meaningful cross-border relationships. The methodology of our regional soft power index – outlined in the following section – takes the above into account and provides a framework to analyse the soft power resources of ten different regions.

### 3. METHODOLOGY

As soft power is their only means of influence, those regional governments most adept in using it will be better placed to attract investment, tourists, students, and talent, as well as provide leadership on global issues like environmental sustainability or trans-national rules and regulations.

Achieving success on these fronts ultimately leads to better outcomes for the citizens and residents of a region. And as has been argued above, 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. Joseph Nye's own model for the conversion of soft power (illustrated in Figure 1) reflects this, making resources the first step in the process.



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

As stated above, the purpose of this research report is to address this first step in the soft power conversion process, by constructing a framework for the measurement of the soft power of regions.

The most established, rigorous methodology for measuring soft power – albeit at the nation-state level – is *The Soft Power 30*, which is produced annually by

Portland, the strategic communications and advisory firm, in collaboration with the University of Southern California.

When Portland launched *The Soft Power 30* research project in 2015,<sup>19</sup> it did so by building on earlier work carried out at the Institute for Government,<sup>20</sup> a London-based think tank. Both research projects sought to address that critical first step in deploying soft power: measurement. Both studies were designed with the nation-state at the core of the exercise. The research underpinning this report takes *The Soft Power 30* framework as a starting point, but adapts it for an analysis of sub-state regions.

Like *The Soft Power 30*, the index built for this study combines objective and subjective data, in order to assess and compare the soft power of ten different regions. For each region, the framework includes objective and subjective metrics on the region's political values and institutions; their cultural output and appeal; the strength of their international networks; their education systems; their capacity for enterprise, innovation, and business friendliness; and their digital infrastructure and online engagement with the world. The sections below provide more detail on the objective and subjective data that constitute the index.

#### Objective data

The objective data is drawn from a range of different sources and is structured into six categories, each one effectively functioning as a sub-index with an individual score for each region. The six sub-indices

are: Government, Culture, Global Engagement, Education, Digital, and Enterprise. The framework of categories was adapted from *The Soft Power 30* index, which itself is built on a survey of existing academic literature on soft power.

The Government sub-index is designed to assess a region's political values, public institutions, level of devolved authority, and major public policy outcomes. It gauges the extent to which a country has an attractive model of governance and whether it can deliver good outcomes for its citizens.

The reach and volume of cultural output is important in building soft power, but mass production does not necessarily lead to mass influence. The Culture sub-index includes measures like annual international tourist arrivals, the number of museums, and even a region's sporting culture.

The Engagement sub-index aims to measure a region's international footprint, and its contribution to international leadership on issues like environmentalism and sustainability. Essentially it captures the ability of regions to engage with international audiences, build meaningful international linkages, and collaborate with global partners.

The ability of a region to attract foreign students, or facilitate exchanges, is a powerful tool of public diplomacy. Foreign student exchanges have been shown to have positive indirect 'ripple effects' when returning students advocate on behalf of their host country of study.<sup>21</sup> The Education sub-index aims to capture this phenomenon as well as the quality of regions' universities and overall performance of their education systems.

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 region's economic model in terms of its competitiveness, capacity for innovation, and ability to foster enterprise and commerce.

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. This sub-index aims to capture the extent to which regions have embraced technology, how well they are connected to the digital world, and their use of digital engagement through social media platforms.

#### Subjective data

One of the biggest challenges to measuring soft power accurately is its inherently subjective nature. To account for this, our regional soft power index utilises newly commissioned international polling data. In designing the polling component of the study, *The Soft Power 30* framework was again used as a starting point. However, adjustments were made to ensure the surveys were applicable to regions, rather than nation-states. A total of 5,000 people were polled across ten different countries to generate the subjective data used in calculating the index. The ten countries that were surveyed were chosen for two reasons. First, because they have been declared priority markets for the Welsh Government; and second because they represent a reasonable spread of opinion across the globe. The ten selected countries for the study are as follows:

- Canada
- China
- UAE
- France
- Germany
- India
- Ireland
- Japan
- Qatar
- US

The polling provides data on international perceptions based on the most common 'touch points' through which people are likely to interface with a region outside of their own country. The categories used for the polling component of the index are as follows:

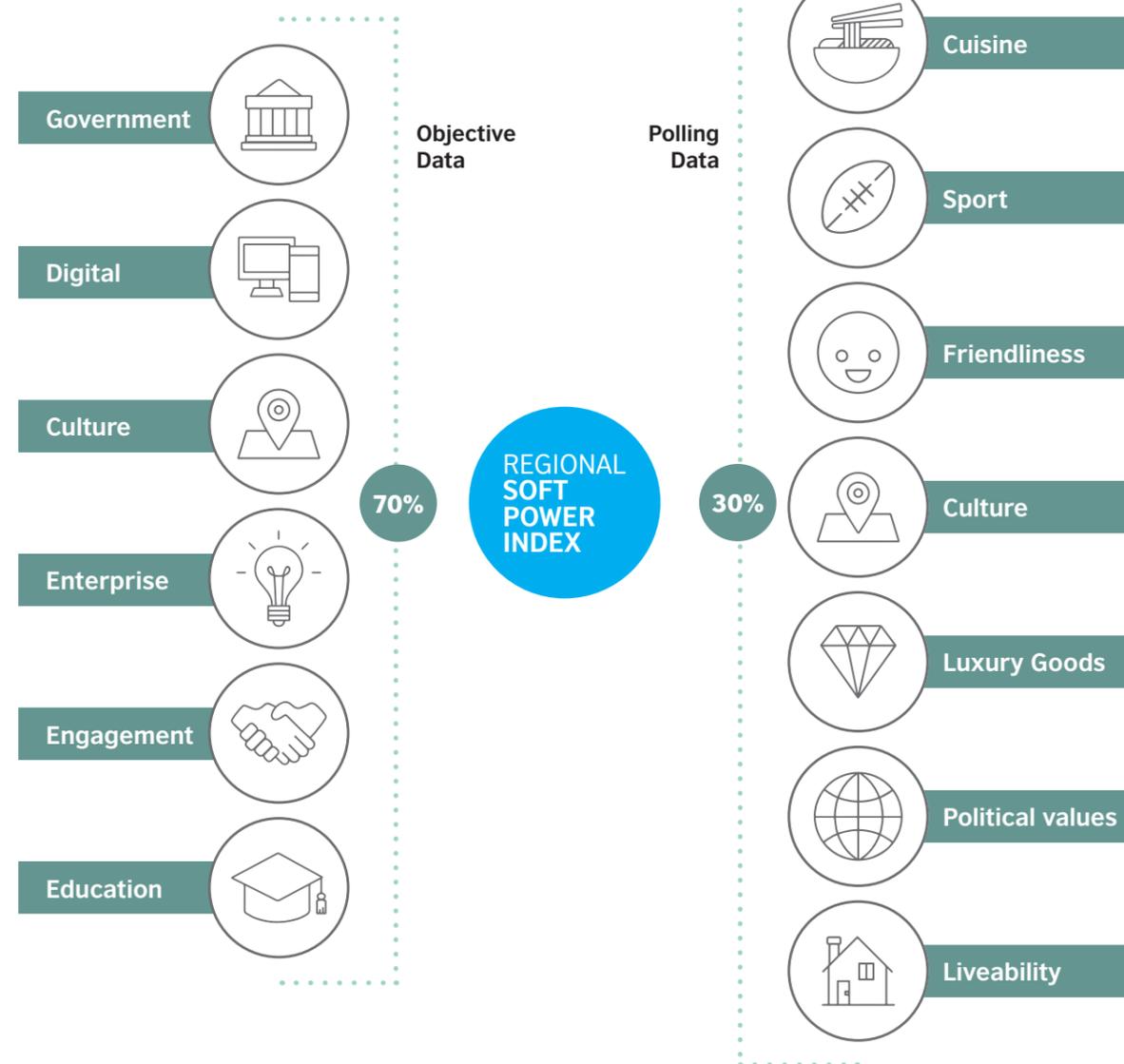
- Cuisine
- Luxury products
- Liveability
- Sport
- Friendliness to tourists
- Political values
- Culture

In addition to the above seven metrics, a question on overall favourability towards a region was included in the surveys. This was used to develop a regression model, where 'overall favourability' was the dependent variable, and the remaining questions were independent variables. The regression analysis was carried out to determine the extent to which the seven categories predict favourability towards a country in the dataset. The regression model allows each of the subjective metrics to be appropriately weighted in the final calculation of the index.

The regression model found that the different categories carried the following weighting as the key drivers of overall favourability:

• Friendliness to tourists	25.1%
• Liveability	8.8%
• Political values	16.2%
• Luxury products	15.2%
• Cuisine	14.5%
• Culture	5.7%
• Sport	4.5%

**REGIONAL SOFT POWER FRAMEWORK**



*Regions included in the study*

The ten regions selected for the index were chosen according to approximate criteria, rather than a rigid formula. The first selected was Wales. This was done as the study was commissioned by British Council Wales with the primary focus on Wales and Welsh soft power. Other regions were then chosen based on several considerations, including level of devolved government authority, GDP size, population size, geographic spread, level of development, and history of international ambitions and engagement. The results of the selection process yielded a final set of ten regions:

- Catalonia, Spain
- Corsica, France
- Flanders, Belgium
- Hokkaido, Japan
- Jeju, South Korea
- Northern Ireland, UK
- Puerto Rico, USA
- Quebec, Canada
- Scotland, UK
- Wales, UK

*Challenges and shortcomings*

The process of constructing a soft power index that shifts away from the nation-state as the primary organising principle, to one that replaces it with sub-state governments is not without its challenges. In building the index, the research team faced several challenges that should be noted. The first is definition, i.e. what constitutes a region? Future research on regional soft power or paradiplomacy would do well to establish a clear typology of regions and cities, perhaps providing a structure that classifies regional governments according to their level of autonomy and international activity.

The second challenge, and certainly related to the first, is the issue of comparability of regions across international borders. Each nation-state-level government has its own constitution or legal conventions that have led to a unique relationship between central and regional governments. For example, California is not perfectly comparable to Hainan Province in China, or Lombardy in Italy.

Despite the vast differences that exist between a diverse set of 195 nation-states around the world, there remains a clear set of attributes, laws, norms, and conventions that govern what they are and what they can do, thus making them broadly comparable. The same cannot strictly be said for regions, which does make direct comparison more challenging.

The third challenge is data availability. This challenge is essentially a by-product of the first two. Different regions follow different standards and practices for collecting and publishing data. While the data gathering process for this study did yield a solid set of comparable metrics, there were certainly elements that would have warranted inclusion in the study, but suitable data did not exist across all ten regions in the index. At the same time, there are not as many reliable third-party sources of data aggregation for regions as there are for nation-states. Much of the data included in the index had to be collected from multiple sources, often ten different sources for a single metric. At times, where appropriate, nation-state level data was used for certain metrics. This was avoided as much as possible, but for some metrics, it made sense to use nation-state level data.

The fourth and final methodological challenge pertains to the subjective side of the index. For the international polling, nation-states tend to have a higher level of public awareness amongst international audiences. The level of awareness will vary across nation-states, but many nation-states will have an inbuilt advantage over regions when it comes to global public awareness. According to our polling, on average one third of respondents felt they had a high level of knowledge on a given region, while one quarter of respondents felt that they had 'some knowledge' of a given region. The table below reports the percentage of respondents saying they have a high level of knowledge for each region in the index.

The level of public awareness will vary region to region, but the fact of the matter is that

regions tend to start from a lower base of operating knowledge when trying to engage with international publics. This is both a challenge and an opportunity. While it may be hard to get traction initially, a given region might be a blank slate for some international audiences; meaning perceptions are largely unformed and probably malleable.

Region	Net Highly Knowledgeable Respondents
Jeju	39.7%
Hokkaido	36.7%
Catalonia	33.3%
N Ireland	31.9%
Scotland	31.8%
Quebec	31.2%
Wales	30.6%
Corsica	29.9%
Flanders	29.4%
Puerto Rico	26.2%

While the above challenges have certainly made the exercise of measuring regional (as opposed to nation-state-level) soft power more difficult, we still feel the index created for this study provides a strong starting position for a new methodology of measuring the soft power resources of regions. We hope the results prove both interesting and useful to those policy makers in regional governments that are charged with the task of engaging international publics. Moreover, we hope it inspires more collaboration and shared best practice between regional governments. Finally, the index should serve as a rallying call for improved standards and practices of collecting internationally relevant data at the regional level.

## 4. RESULTS

After collecting all of the data, running it through a normalisation process, and calculating the final scores for the index, Quebec finishes at the top of our rankings for regional soft power.

Quebec performs well across both the objective and subjective metrics. It tops the Government sub-index and comes in second in the Education and Enterprise sub-indices, offsetting a surprisingly poor performance in the Digital sub-index. Quebec's top spot in Government can be attributed largely to high scores in human development, equality, and human rights.

This is complemented by positive perceptions of its political values, receiving high polling scores from all the countries, an impressive feat considering the divergence in political philosophies and values across the surveyed countries. Famous for its booming knowledge economy, Quebec is one of

the highest spenders globally in Research & Development (R&D), the effects of which are borne out in numerous Nobel laureates in science, and an economy with over one million people employed in the science and technology sector.

Among the ten regions, Scotland performs the most consistently well across the objective sub-indices, coming top in Education, Digital, and Enterprise, and among the top five in Engagement, Culture, and Government.

However, it is let down by low polling scores, resulting in its overall second place. Following devolution efforts and the recent independence

### OVERALL RESULTS

RANK	REGION	SOFT POWER SCORE
1	QUEBEC	65.75%
2	SCOTLAND	62.23%
3	FLANDERS	56.44%
4	CATALONIA	54.86%
5	HOKKAIDO	52.52%
6	WALES	48.62%
7	CORSICA	42.70%
8	NORTHERN IRELAND	35.32%
9	JEJU	31.61%
10	PUERTO RICO	27.81%

referendum, Scotland enjoys somewhat of a more independent identity in comparison to its UK counterparts Wales and Northern Ireland. The 1997 devolution settlements between the UK, Northern Ireland, Scotland, and Wales can best be described as asymmetric. Scotland was given greater autonomy with executive devolution, while Wales and Northern Ireland have had administrative devolution. For Scotland, despite the turbulent politics of the 2014 independence referendum, the extensive media coverage has allowed it to shape a distinct regional identity in the sphere of global affairs, supported by a wide range of soft power assets including its prestigious educational institutions, attractive ecosystem for enterprise, distinct cultural traditions, and globally recognised festivals.

Flanders puts in a strong performance, coming third overall in the index. Flanders performed particularly well on most of the objective data sub-indices, but fared less well on the polling. It is interesting that Flanders seems to suffer a bit from a gap between its objectively assessed soft power resources and international public opinion. It is hard to know exactly why this gap exists. Looking at *The Soft Power 30* data, Belgium experiences a similar trend. Belgium's overall position in the 2015, 2016, and 2017 *Soft Power 30* ranking outperforms its performance in the polling data. There may be an issue of cut-through for Belgium's soft power assets. They clearly exist on the ground, assessed objectively, but may not translate equally into the global public perceptions of Belgium, and indeed Flanders as well.

In contrast with Quebec, Scotland, and Flanders, which find its soft power strengths in Government, Education, and Enterprise, Catalonia's greatest soft

power strengths lie in its cultural assets and efforts in international outreach. Catalonia has a long history of marking itself out as distinct from the rest of Spain. This has played out in language, culture, and even politics. Catalonia, home to a plethora of art museums, monuments, and UNESCO World Heritage Sites, in addition to its vibrant festival scene, earns its top score in the Culture sub-index. However, its poor performances in the Education and Enterprise sub-indices pull it down to 4<sup>th</sup> place. As many advocates for Catalan independence would argue, the region outperforms Spain on many economic indicators like employment, GDP per capita, and R&D spending. As every regional government knows, some nation-state-level economic policies are inescapable, and it is possible aspects of the nation-state-level economic context in Spain have dragged Catalonia down.

The overall scores reported in the table above give us a comparative snapshot in time of the combined soft power resources of the ten regions included in our index. While it is interesting to see how the regions fared against one another in an aggregated measure, we should not rush to assign too much meaning to the overall scores. After all, the index measures soft power resources, so it is capturing potential for influence and attraction, rather than an absolute measure of influence.

The real value of the index lies in breaking down regions' performances by each sub-index and assessing strengths and weaknesses. Likewise, the international polling holds insights on what elements of a country are attractive in the collective mind of international public opinion. The following section breaks down the objective data by sub-index, providing a bit more insight on why regions finished where they did in the rankings.

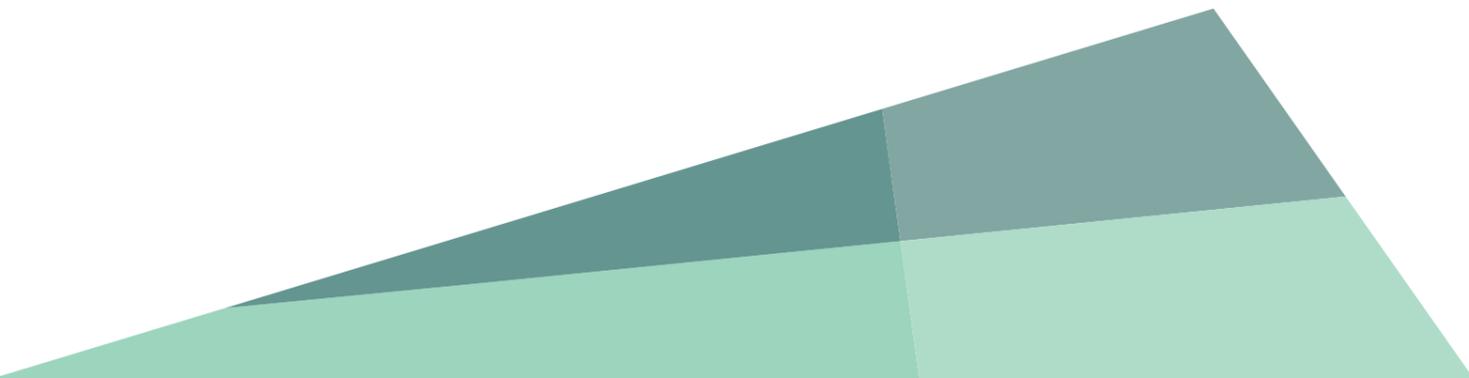
### Engagement

While one may typically associate international engagement with high-profile state visits and the signing of international treaties, regional governments have been empowered by the increasing use and availability of platforms for paradiplomacy. Catalonia dominates the sub-index with the highest numbers of sister city agreements and consulates general in the region. Flanders falls just behind Catalonia, with an impressive network of

international trade and investment offices abroad, the highest among the regions. Quebec comes third, with a large number of trade and investment offices, consulates general hosted in Quebec, and sister city agreements, as well as a strong commitment to environmental sustainability. Jeju's lack of overseas presence and low count in consulates general and sister city agreements indicate a limited international network, resulting in its overall low score in the Engagement sub-index.

### THE OBJECTIVE DATA

Rank	Engagement	Culture	Government	Education	Digital	Enterprise	Polling
1	Catalonia	Catalonia	Quebec	Scotland	Scotland	Scotland	Hokkaido
2	Flanders	Scotland	Flanders	Quebec	Jeju	Quebec	Quebec
3	Quebec	Flanders	Scotland	Puerto Rico	Wales	Flanders	Corsica
4	Scotland	Quebec	Northern Ireland	Flanders	Northern Ireland	Wales	Catalonia
5	Wales	Wales	Wales	Hokkaido	Hokkaido	Northern Ireland	Flanders
6	Corsica	Puerto Rico	Catalonia	Jeju	Catalonia	Hokkaido	Scotland
7	Northern Ireland	Hokkaido	Jeju	Wales	Corsica	Jeju	Wales
8	Puerto Rico	Northern Ireland	Corsica	Catalonia	Flanders	Puerto Rico	Northern Ireland
9	Hokkaido	Corsica	Hokkaido	Corsica	Puerto Rico	Catalonia	Jeju
10	Jeju	Jeju	Puerto Rico	Northern Ireland	Quebec	Corsica	Puerto Rico



## Culture

Catalonia tops the Culture sub-index with strong performances across metrics measuring tourism, art, film, sports, and food. With the highest number of UNESCO World Heritage Sites, music festivals, museums and libraries, it is no surprise that it also attracts the highest number of tourists among the regions with its diverse cultural assets. Scotland takes the second spot with the highest number of film festivals and newspapers, while Flanders comes a close third with the highest public spending on culture, and topping all other regions in the number of Michelin-starred restaurants and professional sports teams. Despite a relatively strong tourism industry, Jeju's overall poor performance in the Culture sub-index is largely due to low numbers of cultural venues and cultural events across arts, music, and sport.

## Government

Amidst ongoing debates around devolution and independence, the Government sub-index is perhaps the most interesting. One of the metrics we used is the Regional Authority Index (RAI),<sup>22</sup> which looks at dimensions such as institutional depth, policy scope, fiscal autonomy, and legislative control to determine the degree of a region's formal authority. Quebec, Flanders, and Scotland, which scored notably well in the RAI, take the top three places in the Government sub-index respectively. Quebec, bolstered by consistently strong performances across metrics in democracy, human development, civil liberties, and equality, comes in first by over 20 points. Puerto Rico's high homicide rate, poor performances in both gender equality, and economic inequity, all contribute to the region's last place.

## Education

Unsurprisingly, Scotland and Quebec dominate the Education sub-index. Both Scotland and Quebec attract over 50,000 foreign students per year, more than double any other region on the list. Scotland, which comes first in the Education sub-index,

has the highest number of top global universities among the regions, and is the top spender on education. Quebec comes in a strong second in the sub-index. Despite having fewer top global universities than Scotland, Quebec attracts the highest number of foreign students among the regions and performs well in the OECD Pisa average scores. Despite coming in top of the OECD Pisa average scores (a reflection of the rigorous education system), Hokkaido is let down by low numbers of foreign students, a potential effect of the lack of taught English programmes, coming in 5th in the sub-index.

## Digital

The Digital sub-index, which measures the extent to which regions are digitally connected, looks at metrics such as social media engagement, digital governance, as well as internet usage. Scotland tops the Digital sub-index with strong performances in social media engagement and government online services. Its tourism authority has the highest numbers of Facebook and Twitter followers, and it performs well in government online services and e-participation. Jeju comes a very close second, its best performance across the sub-indices, due to extensive digital connectivity, reflected in a high number of Internet users, servers and bandwidth. Wales comes third, performing similarly to Scotland in many of the metrics but falling just behind in social media engagement. In last place, Quebec's limited social media presence, and lower than average scores on internet usage results in an overall poor performance in the Digital sub-index.

## Enterprise

The ability of a region to foster trade and investment is a vital soft power asset, and the Enterprise sub-index aims to capture this by looking at inward foreign direct investment (FDI), small-and medium-sized enterprise (SME) activity, as well as metrics around competitiveness, innovation, and transparency.

Scotland comes top, with the highest levels of FDI by a significant amount and the second most SMEs. Strong performances across R&D spending, as well as a friendly investment environment have allowed it to flourish as a business hub, reflected in the number of international businesses that have headquarters there. Quebec, with a similarly high number of international businesses, comes in second in the Enterprise sub-index, helped by its thriving SMEs and booming R&D activity. Hokkaido outperforms the other regions in innovation metrics, but falls behind in SME activity and exports, resulting in 6th place. Corsica comes last due to low levels of inward FDI and SME activity, as well as relatively high levels of unemployment. Wales also puts in a good performance in the Enterprise sub-index, a result of relatively higher levels of exports, SMEs, and foreign direct investment.

## THE POLLING DATA

Hokkaido outperforms all other regions in the polling. Polling data revealed that perceptions towards its consumer and luxury goods, as well as its culture, are particularly strong. This is perhaps unsurprising; Japan finishes at an impressive 4th place in the aggregated polling score for 2017 *The Soft Power 30*, and much of its reputation as an Asian winter destination is attributed to Hokkaido, famous for its ski resorts, hot springs, and the Sapporo Snow Festival. Hokkaido scores consistently well across the polling categories, ranking in the top three in seven out of eight of the polling categories. Hokkaido also performs much better than the only other Asian region on the list, Jeju. However, with China being the main country polled in East Asia, Hokkaido receives its highest scores from outside the immediate region, namely Qatar and France.

Quebec comes second in the polling, boosted by top performances in friendliness, political values and liveability. The only region in North America with a French-speaking majority, and home to the second-largest French-speaking city in the world after Paris, Quebec is a favourite among global French-speaking communities. Indeed, France's

highest scores in the polling go to Quebec in four of the categories. Quebec's popularity, however, is not limited to French-speaking communities. A growing bilingual community, and the availability of public sector services such as health and education in English has made Quebec a popular destination for immigrants in the last decade. Moreover, Montreal – Quebec's largest city – is ranked the 12<sup>th</sup> most liveable city by the Economist Intelligence Unit, and the best city in the world to be a university student by the QS World University Rankings, no doubt contributing to Quebec's attractiveness as a place to visit for work and study.

Despite Corsica's relatively poor scores across the objective sub-indices, it comes in third in the polling, placing it ahead of Northern Ireland, Jeju, and Puerto Rico in the overall ranking. It comes in the top three in all the polling categories except friendliness. Corsica's top performance in the polling for cuisine is perhaps due to its unique blend of Italian and French cuisine, boosted by its wine and cheese export industry. It receives its highest scores across the polling categories from China, India, and the Middle East, but proves to be less popular in the West, scoring below the average given scores among European and North American countries.

Following close behind Corsica is Catalonia. Catalonia, famous for its art and architecture, as well as internationally renowned football team FC Barcelona, tops the polling in sports, and comes in second for culture. Hokkaido, Quebec, and Corsica dominate the top three in the majority of the polling categories, but the sports polling category produced Catalonia and Wales as the most well perceived regions. While Catalonian sport gets a huge boost from FC Barcelona's immense global popularity, Wales enjoys independent representation in numerous international sporting events, allowing it to carve a name for itself as a sporting power. This is most prominent in the Rugby World Cup and international football competitions, and appears to have served it well in the international polling.

## 5. DEEP-DIVE ON WALES

### POLLING RESULTS BREAKDOWN

Favourability		Cuisine		Friendliness		Luxury goods	
1	Hokkaido	1	Corsica	1	Quebec	1	Hokkaido
2	Quebec	2	Catalonia	2	Hokkaido	2	Corsica
3	Corsica	3	Hokkaido	3	Catalonia	3	Flanders
4	Flanders	4	Flanders	4	Flanders	4	Quebec
5	Catalonia	5	Quebec	5	Scotland	5	Catalonia
6	Scotland	6	Jeju	6	Corsica	6	Wales
7	Wales	7	Puerto Rico	7	Wales	7	Scotland
8	Northern Ireland	8	Scotland	8	Northern Ireland	8	Jeju
9	Jeju	9	Wales	9	Jeju	9	Northern Ireland
10	Puerto Rico	10	Northern Ireland	10	Puerto Rico	10	Puerto Rico

Political values		Visit for work/study		Culture		Sports	
1	Quebec	1	Quebec	1	Hokkaido	1	Catalonia
2	Hokkaido	2	Hokkaido	2	Catalonia	2	Wales
3	Flanders	3	Corsica	3	Corsica	3	Scotland
4	Corsica	4	Scotland	4	Scotland	4	Corsica
5	Wales	5	Catalonia	5	Quebec	5	Quebec
6	Scotland	6	Wales	6	Wales	6	Northern Ireland
7	Catalonia	7	Flanders	7	Flanders	7	Hokkaido
8	Northern Ireland	8	Northern Ireland	8	Northern Ireland	8	Flanders
9	Jeju	9	Jeju	9	Jeju	9	Jeju
10	Puerto Rico	10	Puerto Rico	10	Puerto Rico	10	Puerto Rico

Wales places 6th overall among the ten regions in the index. Among its fellow UK neighbours, it ranks four places behind Scotland and two places ahead of Northern Ireland. Wales’ greatest soft power assets lie in Digital and Enterprise, and its most obvious areas for improvements are in Education and Polling.

### BREAKDOWN OF OBJECTIVE DATA

#### Digital

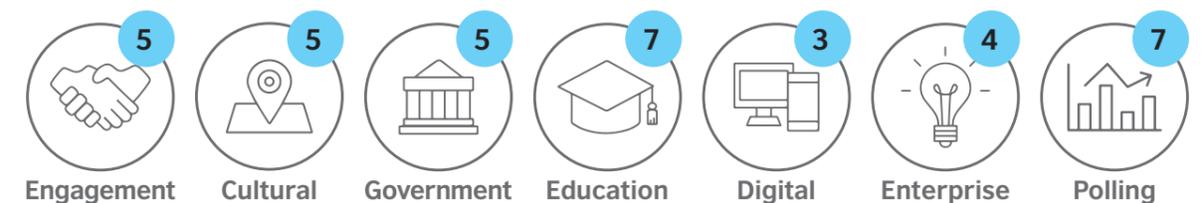
Wales posts an impressive 3rd place ranking in the Digital sub-index. As the UK government plays a key role in coordinating digital and mobile connectivity across all the UK regions, it is perhaps unsurprising that Scotland, Wales, and Northern Ireland all place in the top five for the Digital sub-index. Government online services are advanced and e-participation is high in Wales and across the UK. Internet usage is extensive in Wales, with a high number of broadband subscriptions and secure Internet servers both of which reflect a highly functional digital infrastructure. In addition, the Welsh Government has made concerted efforts to further invest in digital infrastructure, to promote digital innovation, and expand broadband access. All of these are major factors in Wales’ overall strong position in the Digital sub-index. Initiatives such as the Superfast Cymru project are likely to boost connectivity even further, and Wales should ensure that its efforts are translating into soft power. An

area for improvement for the Welsh Government could be expanding its social media reach to international audiences. As Wales underperforms in the Engagement sub-index, leveraging digital platforms more effectively could be a way for Wales to increase its reach to international audiences.

#### Enterprise

Wales’ second strongest performance is in the Enterprise sub-index. Although there have been concerns around Wales as a ‘lagging region’ in the wider UK economy due to its low levels of gross value added (GVA), high amounts of inward FDI, a large number of SMEs, and high levels of export suggest that Wales remains an attractive place for business. In fact, Wales outperforms larger regions in the index such as Hokkaido and Catalonia. Wales performs well in metrics around competitiveness, transparency, and economic freedom, and is able to leverage strong transport links to major UK and European cities to position itself as a leading investment destination. This is evident in its Enterprise Zones. Where it can improve, however, is

### WALES’ PERFORMANCE



in R&D. Wales falls behind in innovation-related metrics, posting low levels of R&D spending compared to the other regions. As Wales continues to develop its service industry and drive growth in high value-added sectors, increasing R&D investment will play an important role.

**Engagement**

Wales, with its trade and investment offices, as well as its sister city agreements, clearly has a track record of international outreach. However, it falls behind Flanders, Catalonia, and Scotland significantly in the number of trade and investment offices abroad, as well as the number of sister city agreements. It is also the only region in the study that does not host any consulates general from foreign governments. This limits its capacity for paradiplomacy in a formal capacity, and as such Wales should work all the more hard at creating international engagement opportunities on its own terms. The Welsh Government has announced plans to expand its overseas network and this is definitely encouraging. A wider network would definitely strengthen Welsh soft power.

However, Wales excels in its commitment to international priorities, namely sustainability. According to the European Environmental Bureau, Wales is one of the top recyclers in Europe, second only to Germany for the percentage of waste that is recycled. Moreover, Wales is the only UK region that is a member of the Network of Regional Governments for Sustainable Development (nrg4SD), a global network that represents regional governments in the fields of climate change and sustainable development. This presents Wales with a unique opportunity to take a leading role in sustainability issues on an international scale, and it should ensure its voice is heard on the global stage. Participation in international network organisations is a good opportunity for raising Wales' profile and building meaningful international partnerships.

**Culture**

Wales, like the other 'Home Countries' of the UK, has a unique arrangement when it comes to certain international sports. Having its own national football

and rugby teams certainly helps raise its profile through international sport. Moreover, Wales is home to a number of professional sports teams that contribute significantly to its performance in the Culture sub-index. As demonstrated by North Korea and South Korea at the recent Winter Olympics, sporting representation can have enormous implications for wider global perceptions of a country; therefore we should not underestimate the importance of sport as a soft power asset for Wales.

However, Wales' middling performances in the remaining Culture metrics, particularly those relating to visual art and festivals, prevent it from closing the gap with regions such as Catalonia and Scotland, both of which offer a wider variety of cultural assets. We include two festival metrics in the index: film and music. On Film Festivals, Wales does well, coming third to only Quebec and Scotland. However, on music festivals, Wales is some way behind most of the regions. Wales also falls behind nearly all regions in tourism figures, ahead only of Northern Ireland. As Wales is one of the top spenders on culture among the regions studied, it should ensure its investment efforts in infrastructure and events are matched by appropriate campaigns to ensure that public expenditure reaps rewards in both international perceptions and economic benefit. Organisations such as the British Council and Arts Council of Wales / Wales Arts International are key resources Wales should use to develop work in this area.

**Government**

Relative to the other regions, Wales receives middling scores in metrics measuring human development, gender equality, income equality, press freedom, and civil liberties in general. Although Scotland and Northern Ireland score similarly on these metrics, they edge ahead of Wales largely due to stronger scores in the Regional Authority Index. The difference in scores in the Regional Authority Index, which measures the degree of authority a region has, is reflective of the greater devolved powers for Scotland and Northern Ireland. Scotland is able to further extend its lead on Wales due to a higher number of think tanks in the region, coming second only to Quebec. It is also

worth noting that Government is the only sub-index where Wales performs worse than Northern Ireland – despite Northern Ireland not having a functioning power-sharing agreement in place for the executive.

**Education**

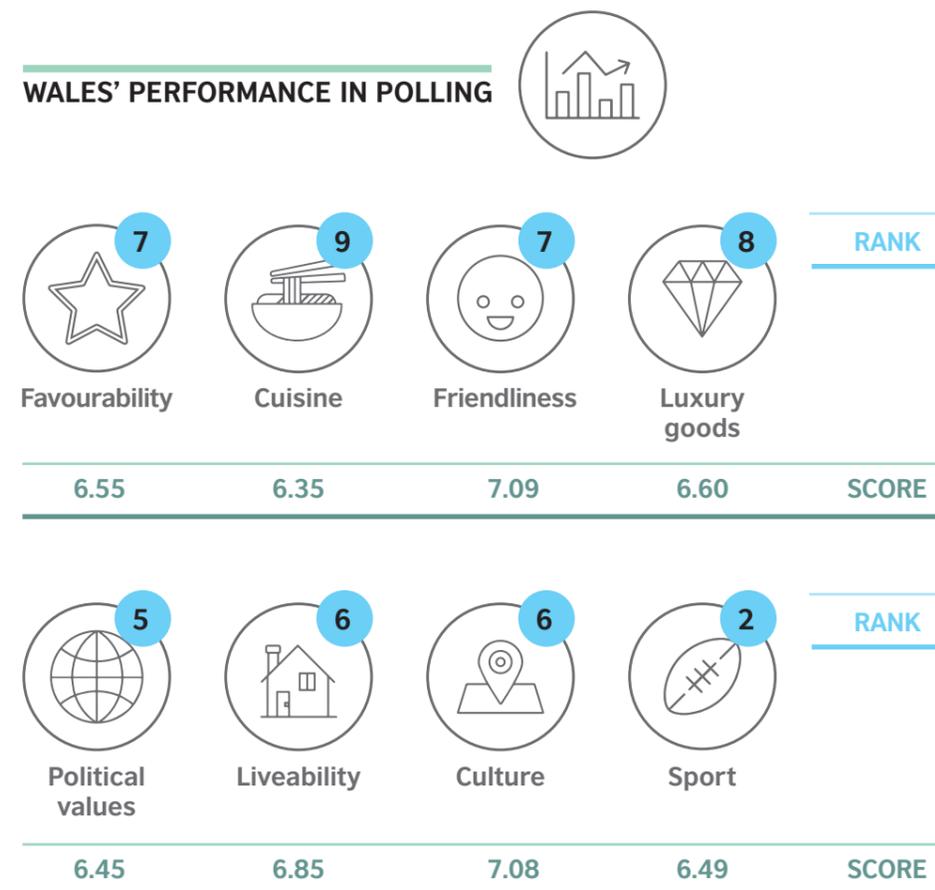
Wales' poorest performance in the objective data is in the Education sub-index. This is largely due to a lower number of top global universities and lower number of international students compared to regions such as Scotland, Quebec, and Catalonia. Wales falls behind Catalonia only slightly in the number of international students, but Quebec and Scotland host more than double the number of that hosted by Wales. While this is likely to be correlated with the number of top universities in the region, Wales by no means has a lack of high quality educational institutions. Wales currently has four universities in the global top 500. This is above the average of three top universities across all ten regions.

It is important to understand where Wales can effect change and take advantage of the tools it already has to raise its profile in higher education. Wales can and should work towards improving the quality of its educational institutions in the long run, but it can also leverage platforms such as the British Council to drive up numbers of international students to existing top universities in Wales. Particularly as students look increasingly towards the experiential aspect of university, as opposed to international rankings, Wales can leverage other soft power assets to attract more foreign students.

**POLLING RESULTS**

**Breakdown of polling results**

Wales comes 7th overall in the polling, its poorest ranking apart from the Education sub-index. Despite an impressive performance in the polling for sport, it is unable to offset poor scores in cuisine, friendliness, and consumer and luxury goods. That



being said, its 2nd place in the sports polling category is a notable achievement in itself, and should be honed as a tool in the growing use of sport diplomacy. As discussed in earlier sections, positive perceptions of Welsh sport is likely due to its independent representation in major sporting events. While rugby has traditionally appealed only to the UK, Australia, New Zealand, France, Ireland, and South Africa, it is expanding quickly across the globe. With Hong Kong and Singapore participating in the Rugby Sevens, and the 2019 Rugby World Cup being hosted in Japan, rugby presents Wales with a growing opportunity to reach larger audiences in Asia through the sport.

In general, Wales receives its highest scores from India, China, UAE, and Qatar, and receives its lowest scores from Japan and Germany. However, it is important to take into account the fact that, on average, survey respondents in India give out higher scores, while survey respondents in Japan give out lower scores. When comparing to the average score given by each country to all regions, Wales actually performs relatively well in Canada, Japan, and Ireland, and relatively poorly in India, France, and Qatar. Wales receives higher than average scores across all the polling categories except cuisine from Canada, China, and Japan, but lower than average scores across all the polling categories from Qatar. However, it is worth noting that Wales is actively seeking to build international links with Qatar. A new Qatar Airways daily route between Cardiff and Doha will begin in May and a Welsh Government office is due to open in Doha soon.

Wales is perceived relatively well in political values and liveability, scoring just above the average score. It receives strong scores from Japan, the US, and Canada in these areas, but receives below-average scores from Germany and Qatar. It is interesting to note that Wales' immediate neighbours are generally more unfavourable towards it, despite being more likely to have a better understanding of Welsh soft power touch points. The polling results provide useful insights into areas where perceptions of Wales can be improved, but it is important to consider where the opportunities lie, and where they are limited.

Wales performs extremely poorly across the board in cuisine, but this is a difficult area in which to improve perceptions. An area Wales might want to consider working on is friendliness to tourists. Particularly as tourism in Wales is a growing industry, it is worth noting that Wales received relatively low scores from UAE, Qatar, Germany, France, and India. Countries that were most positive about Wales' friendliness to tourists were the US, Japan, and Canada.

Aside from the general consensus around Wales' sporting prowess, the lack of clear trends in the polling is perhaps indicative of a fragmented understanding of Wales outside of sport. As Wales works towards further developing its soft power assets, and ultimately shaping a stronger global brand, it will be important to build on the existing soft power strengths of Digital, Enterprise, and Sport that it can deploy that can be used to generate greater levels of international awareness of Wales, what it stands for, and what it has to offer international audiences.

**OVERALL FAVOURABILITY**

	UAE	Germany	Qatar	France	Canada	Japan	US	India	China	Ireland	Total
Wales	6.81	5.06	6.62	6.69	7.13	5.08	6.48	7.82	7.34	6.48	6.55
Average	6.83	5.09	7.23	6.88	6.99	4.54	6.51	8.02	7.33	6.28	6.59
Difference	-0.02	-0.03	-0.61	-0.19	0.14	0.54	-0.03	-0.20	0.01	0.20	-0.04

## 6. RECOMMENDATIONS FOR FURTHER DEVELOPING AND DEPLOYING WELSH SOFT POWER

Taken together, the objective and subjective soft power data for Wales report a mixed performance. There are some clear strengths on which Wales can build, but also indications that more needs to be done to lift overall levels of awareness outside of sport.

The following section outlines a targeted set of recommendations designed to strengthen Wales' soft power assets and leverage those already in place. One of the aims of this study was to develop a set of recommendations based on the results of the regional soft power index.

The recommendations that follow are structured into four categories. The first three categories focus on Wales' soft power resources and follow the structure of our soft power index framework. The final category is broader and draws on our collective knowledge of best practice in soft power and strategic communications.

It must, of course, be recognised that much of a region's soft power resources exist outside of the control of government. This limits the direct action a government can take in developing soft power assets. Bearing this in mind, there are still concrete steps that could be taken to strengthen Welsh soft power.

**Education**

Looking comparatively at higher education at the national level, the UK is one of the great academic powerhouses of the world. Only the US attracts more international students than the UK overall, and only the US has more universities in the global top 200 ranking, as assessed by QS, than the UK. At the regional level, Wales has not managed to capitalise on this academic success as much as other parts of the UK, particularly Scotland.

To strengthen its soft power assets in Education, our first recommendation is that Wales should target a small number of universities that sit just outside the global top 200 and work to make enough improvements to push those institutions into the top 200. Increasing the number of Welsh universities in the global top 200 would send a strong signal to potential international students and mark Wales as a more attractive place to study.

Our second recommendation is that Wales needs a dedicated campaign to attract more international students. Wales should identify several key markets and launch a targeted campaign aimed at prospective international students. Increasing the number of international students would benefit Wales economically, but also serve as a boost to its soft power.

Of course, it should be recognised that the Welsh Government can already point to positive developments in line with this recommendation. The launch of Global Wales, a partnership between Welsh Government, British Council, Universities Wales, the Higher Education Funding Council for Wales and all eight Welsh universities, is an important platform that should be expanded. The partnership is in the third year of an initial pilot programme seeking to build engagement with two priority markets: the US and Vietnam. This model could be expanded to include more markets based on the conclusion of the pilot programme.

### Engagement

Wales, like nearly all of the regions included in the index, has an overseas presence with trade and investment offices around the world. However, Wales has fewer of these offices than all but three regions included in the index. Our third recommendation would be to review the current network and ensure it is aligned with priorities. We would also argue that the review should start from the premise that Wales needs more overseas offices. Again, recent progress from the Welsh Government on this should be recognised. March 2018 saw the opening of a new office in Montreal and four more are due to open by the end of the year. This is a great development and a step in the right direction. But Wales does need to catch up on this, as the top performers in the index are able to leverage much larger existing international networks.

Our fourth recommendation is that Wales should engage in paradiplomacy with a set of priority countries and encourage them to open consulates general in Cardiff. If Wales hosted more consulates general, it would make government-to-government collaboration easier and more likely.

Our fifth recommendation is that Wales should encourage its cities (councils) to grow their own international networks through cross-border partnerships, organisations, or even sister city agreements. Doing so would increase the opportunities for people-to-people contact between Wales and communities abroad. Welsh city region structures, like Swansea Bay City Region and Cardiff Capital City Region, would be well placed to take this recommendation forward.

### Culture

As discussed above, Wales is internationally recognised for a great sporting culture. But outside of sport, Wales underperforms against most other regions in the Culture sub-index. When it comes to developing a thriving cultural infrastructure, there is

only so much a government can do. Most of which revolves around creating the right ecosystem for cultural industries to thrive, but doing so is far from easy or straightforward.

However, we see two actions the Welsh government could take to improve Wales' cultural soft power assets. Our sixth recommendation is that the Government should work with festival organisers, existing cultural venues, and institutions to host more festivals with a large enough profile to attract international audiences. Pitched correctly, this would not only improve cultural opportunities for residents in Wales, but would likely have a positive knock-on effect in bringing in more international tourists. One way to do this well could be focusing efforts on a single annual cultural platform that would have enough resource to collaborate with institutions, artists, and people on a global scale, and deliver a world-class experience.

Our seventh recommendation pertains to an important part of Welsh culture that certainly marks it out from the rest of the UK: language. The Welsh Government has done an excellent job to protect and promote the use of Welsh in Wales. However, we feel there is much that could be done with the language outside of Wales, effectively using it as a way to both raise interest in Wales and differentiate it from the rest of the UK. As such, we recommend Wales make greater efforts to share the language with international audiences, incorporating it in tourism promotion campaigns. But more importantly, we think Wales should position itself as a champion of smaller, unique languages, or even endangered languages. In doing so, Wales should create a network of regions and countries that share unique languages, such as Breton, Romansh, or Basque. Additionally, Wales' work in championing bilingualism and leading on policies to develop and nurture bilingualism and its benefits could be a feature of this recommendation. A number of countries have an interest in bilingualism and Wales could do more to share its own experience and expertise in this area.

### Strategic Communications and Public Diplomacy

Of course, Wales needs not only to think about how to improve its soft power resources, but also how to leverage what it has. One of the surprising results for Wales coming out of the polling was in perceived friendliness/welcoming to tourists. Wales finished joint-sixth in this category, which our regression analysis shows to be the most important driver of favourability for regions. One way to address this, our eighth recommendation, is to build a strategic communications campaign around Welsh people. The Visit Wales tourism promotion agency should look to build a campaign using primarily video and social media to showcase real Welsh people working in hospitality, culture, leisure, and travel. Putting Welsh people at the centre of a tourism promotion campaign would be the best way to showcase Wales' friendly spirit and hospitality.

Our ninth recommendation is centred on the upcoming Rugby World Cup in Japan. The Welsh Government should use this opportunity to construct a big public diplomacy set piece in Japan. As there will be much more Asian interest in the 2019 World Cup, with new audiences to reach, Wales should set up a major public installation and make it the biggest public outreach Wales has run to date. Good models for such an exercise can be found in the way some countries have run open

houses during the Olympics. Switzerland's specialist Ministry of Foreign Affairs unit, Presence Switzerland, serves a great example, as they normally run a large public-facing 'Swiss House' during the Olympics. Likewise, Wales could take inspiration from World Expo pavilions. However it is done, Wales should treat the Japan World Cup as a huge public engagement opportunity and showcase the very best of Wales, far beyond national sport.

Our tenth and final recommendation is definitely within the power of the Welsh Government to deliver. Drawing on global best practice, the Welsh Government could do a great deal for Wales' soft power and its ability to engage international audiences effectively if they overhauled how the Government managed its international affairs. At the official level, we would strongly recommend the Welsh Government create an international directorate that would consolidate all the international functions of the government. At the political level, we would strongly recommend the creation of an international ministerial portfolio at the cabinet level. The end result would be a much more strategic, purposeful, and coherent approach to building a stronger brand for Wales. The various functions of international engagement need to have a consistent narrative and greater coordination. Changes in the machinery of government would go a long way to helping achieve that.



## 7. CONCLUSIONS

In terms of the research agenda going forward, there is a great deal of work to be done. The fields of paradiplomacy and regional soft power would benefit from two different strands of work. The first would focus on building better comparable data sets for regional governments.

Better comparable data would aid both researchers and policy makers alike by furthering progress on the measurement challenge. In that same vein, some deep-dive studies on cause and effect of attempts to leverage specific soft power assets would hugely benefit the field. The second strand of work should take a purely practical approach and develop a wider body of shareable best practice in paradiplomacy and regional public diplomacy. A framework for assessing best practice would again benefit researchers and practitioners alike.

It is certainly our hope that this report has made at least a small contribution to the research on the soft power for non-state actors and the wider field of paradiplomacy. As stated in the Methodology chapter, we recognise the shortcomings of this particular study. But even accounting for those, we hope that our new regional index will be received as a worthy first effort to systematically measure the soft power resources of regions. Above all, we hope it will inspire further research in the field and new approaches from regional governments, policy makers and stakeholders, particularly those in Wales, to develop and use their soft power.

It should not surprise that the strongest performing regions in our soft power index are those that have a history of state-less nation building. That is to say, Quebec, Scotland, and Catalonia have all built a national identity irrespective of not being a nation-state. They have had flirtations with independence, though – as of now – none have made it a political reality. But even without the benefits of statehood, these regions have certainly managed to build a linguistic,

geographic, civic, and at times political identity separate from that of the nation-states in which they exist.

This is partially true of Flanders, and there is certainly a linguistic divergence from the rest of Belgium, though the Flemish have less of a clear-cut affinity with nationalism and separatism than Quebec, Scotland, and Catalonia. The reason for that is likely down to a political context that is vastly different from the power structures that govern most regional-national relationships. Along with Switzerland, Belgium is one of the two most commonly cited examples of 'consociationalism', which describes a political power-sharing solution to societal divides along ethnic, religious, and/or linguistic lines. Belgian consociationalism has yielded two major regions, Flanders and Walloon, as well as a smaller region for the capital, Brussels. Because Flanders and Walloon each enjoy an equal level of regional autonomy, the case for independence and separation is perhaps less persuasive.

In the context of Wales, the process of devolution has been a relatively recent development. Scotland, for example, has long had separate institutions, like its legal and higher education systems. Moreover, Scotland's strong sense of national identity can be described as 'civic' or 'political' first, 'cultural' second, and 'linguistic' a distant third. Welsh national identity, on the other hand, is perhaps the inverse of that. As Wales continues to build up its institutions, and gets to grips with how those institutions can play a more international-facing role, it should be able to close the gap on the more

'institutionally -established' regions that hold a strong sense of national identity. As the data shows, the top countries have a level of institutional maturity that has clearly afforded them a set of distinct soft power assets that international audiences are more likely to both recognise and view favourably.

This is exactly what the recommendations outlined above ultimately seek to do through two distinct actions. The first action is to further develop the soft power resources Wales has at its disposal. This would not come free or easy, but it can and should be done through the areas highlighted above.

The second action is to address what we might describe as Wales' brand awareness problem. Above all, Wales needs a coherent, consistent

narrative that can differentiate it from its immediate neighbours with a clear offer to international stakeholders. We feel strongly that a new centralised structure within the Welsh Government could do more to coordinate and marshal all of Wales' international-facing efforts.

As the data shows, Wales is not terribly far off a top-five finish in our rankings. There is certainly room for improvement, but Wales is starting from a reasonable base in terms of its soft power. The Welsh Government should take encouragement from Wales' soft power strengths in Digital, Enterprise, and Sport and consider the recommendations in this report as ways to further develop Wales' soft power assets and build the structures within government to leverage those assets more effectively.

## APPENDIX: REGIONAL SOFT POWER INDEX METRICS AND DATA SOURCES

Metric	Source
<b>Engagement</b>	
Number of trade / investment offices abroad	Various
Number of consulates general in the region	Embassypages.com
Membership of nrg4SD	nrg4SD
Air Quality Index	World Health Organisation
Environmental Performance Index	Yale Center for Environmental Law and Policy
Number of sister cities	Various
Asylum seekers per 1000 population	Asylum Seeker Resource Centre
Visa Restrictions Index	Henley & Partners
<b>Culture</b>	
Total number of tourist arrivals	Various
Average spend per tourist	Various
Number of film festivals in the region	Various
Number of UNESCO World Heritage Sites	UNESCO Statistics
Power Language Index	Chan, K., 2016. Power Language Index.
Number of museums and libraries	Various
Number of music festivals in the region	Various
Number of top museums in the region	The Art Newspaper Review
Number of Michelin-starred restaurants in the region	Michelin Guide
Number of professional sports teams	Various
Airport Hub Rating	Skytrax
Number of newspapers operating in the region	Various
Public spending on culture	Various
<b>Government</b>	
Human Development Index score	UNDP
Regional Authority Index	Hooghe, Liesbet, Gary Marks, Arjan H. Schakel, Sandi Chapman Osterkat, Sara Niedzwiecki, Sarah Shair-Rosenfield, 2016. Measuring Regional Authority: A Postfunctionalist Theory of Governance, Volume I.
Number of think tanks in the region	Various
Gender Equality Index	UNDP
The Economist Democracy Index	Economist Intelligence Unit
Homicide rate	Various
Civil Liberties score	Freedom House
Capital punishment	Cornell Centre on the Death Penalty
Gini coefficient	Various
Press Freedom Index	Reporters Without Borders

<b>Education</b>	
Average of OECD Pisa score	OECD
Number of top global universities	QS World University Rankings
Number of foreign students	Various
Pupil to teacher ratio	Various
Spending as a percentage of GDP	Various
<b>Digital</b>	
Facebook followers for First minister/governor	Facebook
Twitter followers for First minister/governor	Twitter
Facebook followers for tourism authority	Facebook
Twitter followers for tourism authority	Twitter
Number of internet users per 100 inhabitants	World Bank
Number of secure internet servers (per 1 million people)	World Bank
Number of mobile phones (per 100 people)	World Bank
Internet bandwidth (thousand mbps)	Akamai State of the Internet
Government Online Services Index	Web Index
E-participation Index	Web Index
Number of fixed broadband subscriptions (per 100 people)	World Bank
<b>Enterprise</b>	
Global patents as a percentage of GDP	World Intellectual Property Organisation
Competitiveness Index	World Economic Forum
Value of Foreign Direct Investment	Various
Index of Economic Freedom score	Heritage Foundation
Corruption Perceptions Index	Transparency International
R&D spending as percentage of GDP	Various
Number of small and medium-sized enterprises (SMEs)	Various
Number of SMEs as a percentage of total employment	Various
Value of exports as a percentage of GDP	Various
Unemployment rate as a percentage of labour force	Various
Number of Fortune 500 business headquarters	Fortune 500



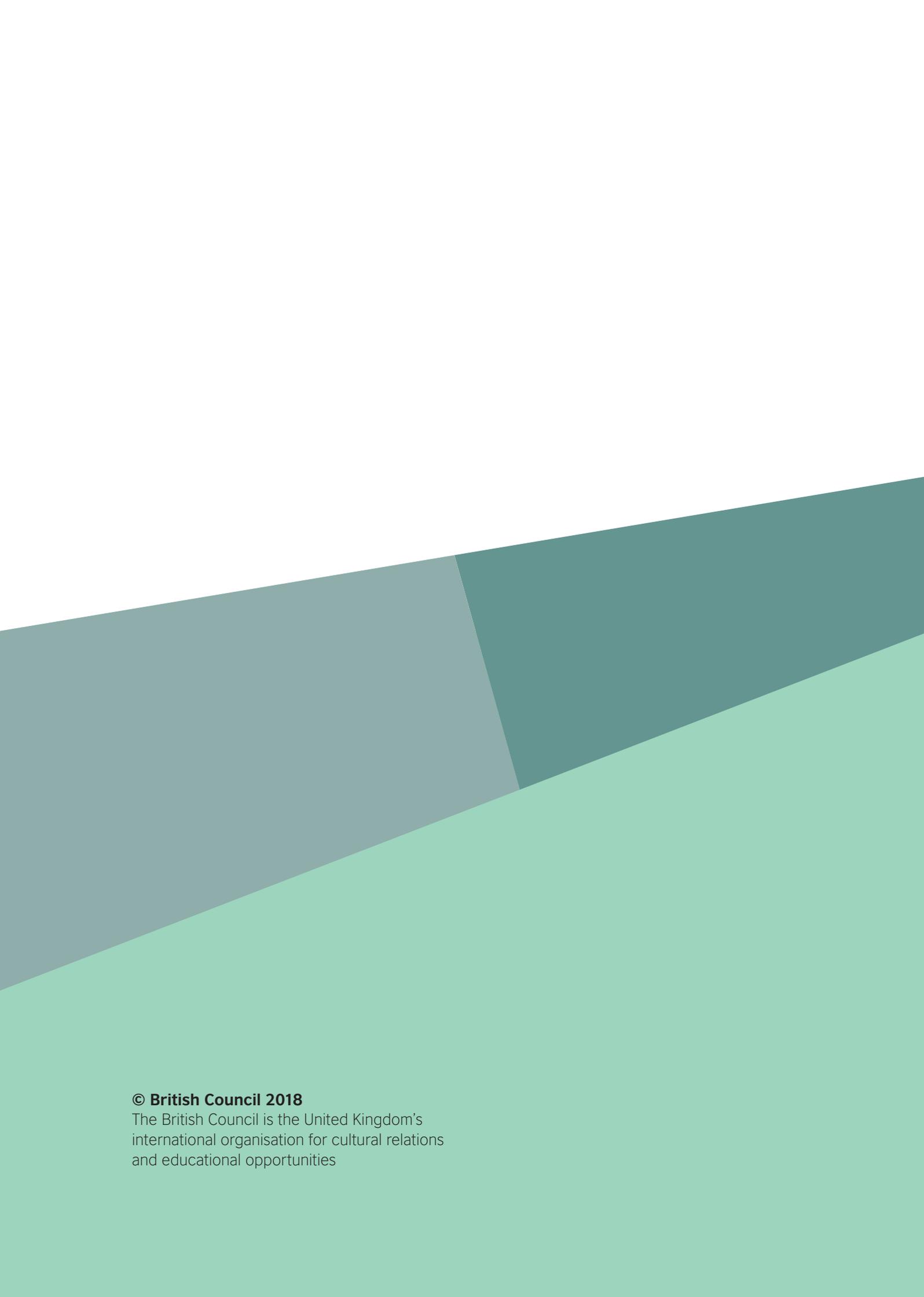
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