

WALES SOFT POWER BAROMETER 2018

Measuring soft power beyond the nation-state



01

WHAT IS SOFT POWER?

Hard Power vs. Soft Power

HARD POWER

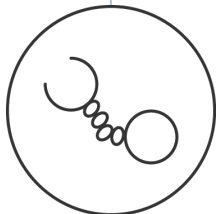
Hard power is the exercise of influence through coercion, relying on tactics like military force, payments, and economic sanctions



MILITARY



PAYMENT



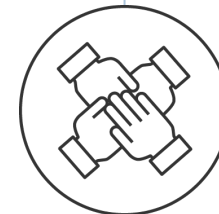
SANCTIONS

SOFT POWER

Soft power uses attraction and persuasion to change minds and influence behaviour. Soft power is generated and leveraged through culture, public diplomacy, and a positive global contribution



CULTURAL PROMOTION

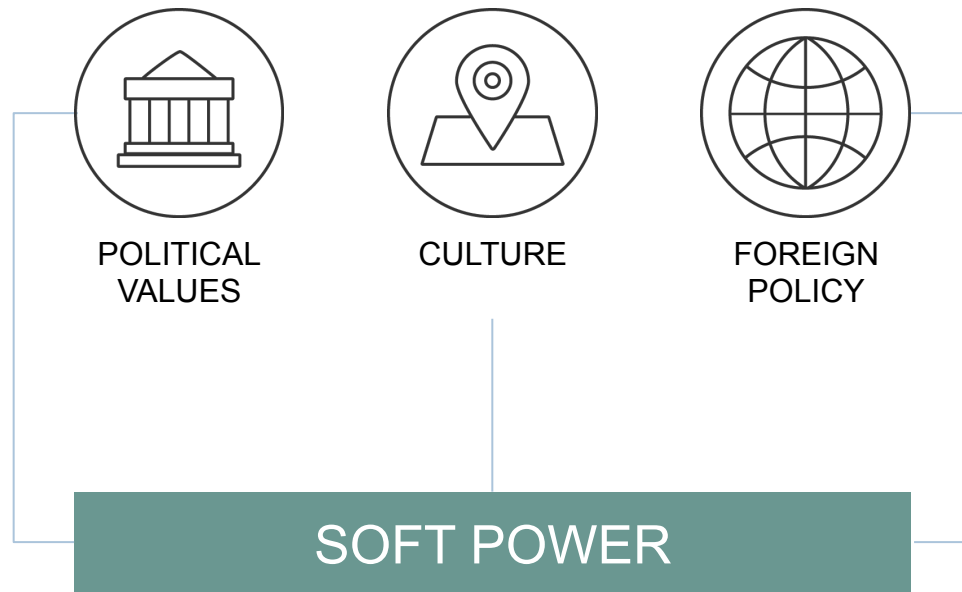


PUBLIC DIPLOMACY



GLOBAL CONTRIBUTION

Joseph Nye, the originator of soft power, sets out three pillars as the sources of soft power...



Three global mega-trends driving change in international politics

A significant acceleration of the global rebalancing of economic, political, military, and soft power

GEOPOLITICAL VOLATILITY

BREXIT &
AMERICA FIRST

QUESTIONING OF
OLD ALLIANCES

SHIFTING
US-CHINA DYNAMIC

DEVOLVING POWER

POWER SHIFTING
FROM WEST TO EAST

POWER SHIFTING
TO NON-STATE ACTORS

NON-TRADITIONAL
DIPLOMACY

DIGITAL REVOLUTION

TRANSPARENCY

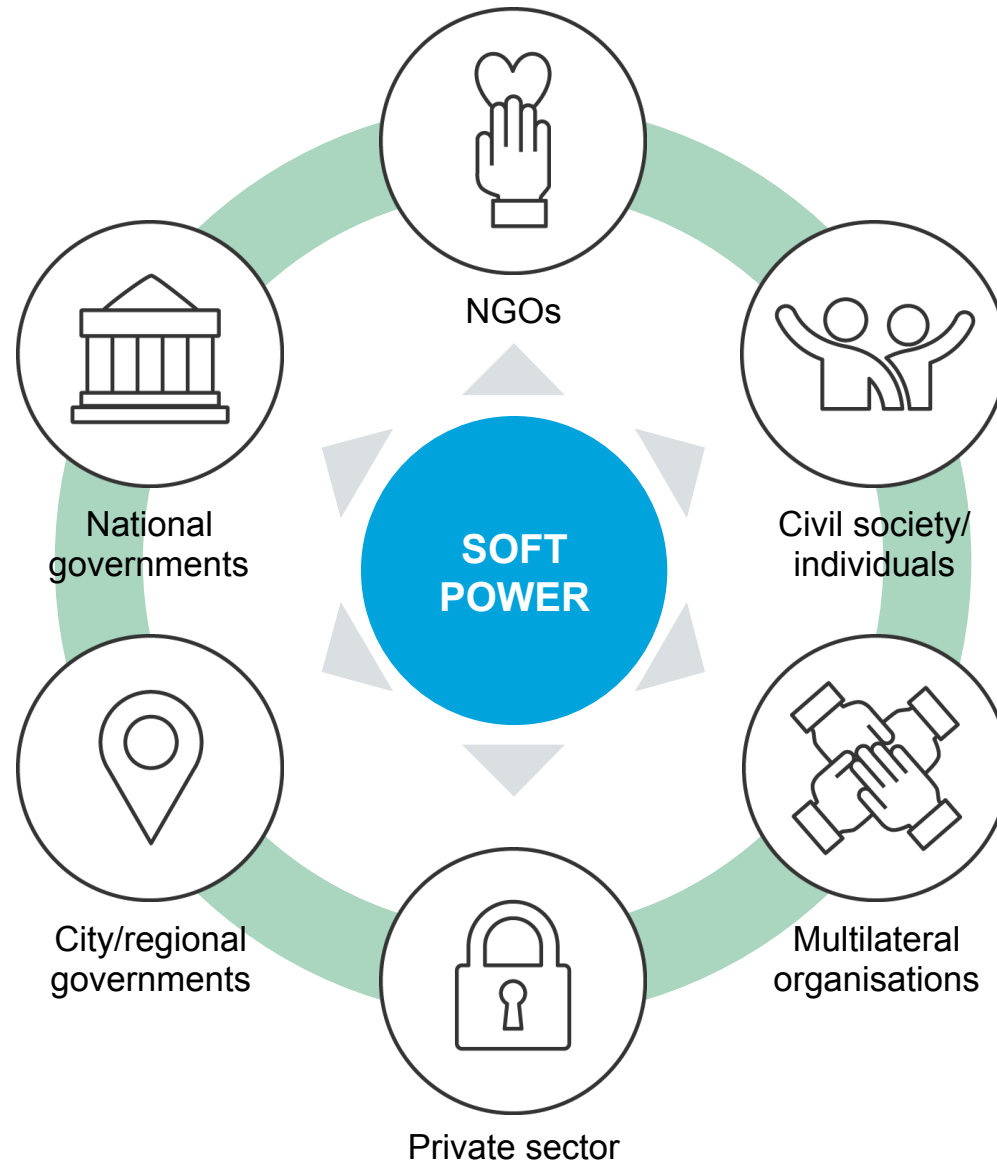
AI BRINGING

TRANSFORMATIONAL CHANGE

DIGITAL
DIPLOMACY

PLATFORMS FOR
ACTIVISM

Why does soft power matter?



“Because networks shape global outcomes.”

Regions and cities are engaging on global issues in ever greater numbers

Three factors make this possible and necessary

GLOBALISATION

ECONOMIC
INTERDEPENDENCE

COMPETITION
FOR CAPITAL & TALENT

TRANS-NATIONAL
CHALLENGES/ISSUES

AUTONOMY/ DEVOLUTION

POWER SHIFTING
TO NON-STATE ACTORS

NON-TRADITIONAL
DIPLOMACY

MORE PLATFORMS TO
ENGAGE GLOBAL PUBLIC

NATIONAL GOV'T SUPPORT

POWER DIFFUSION

BENEFITS
NATIONAL-LEVEL GOVT

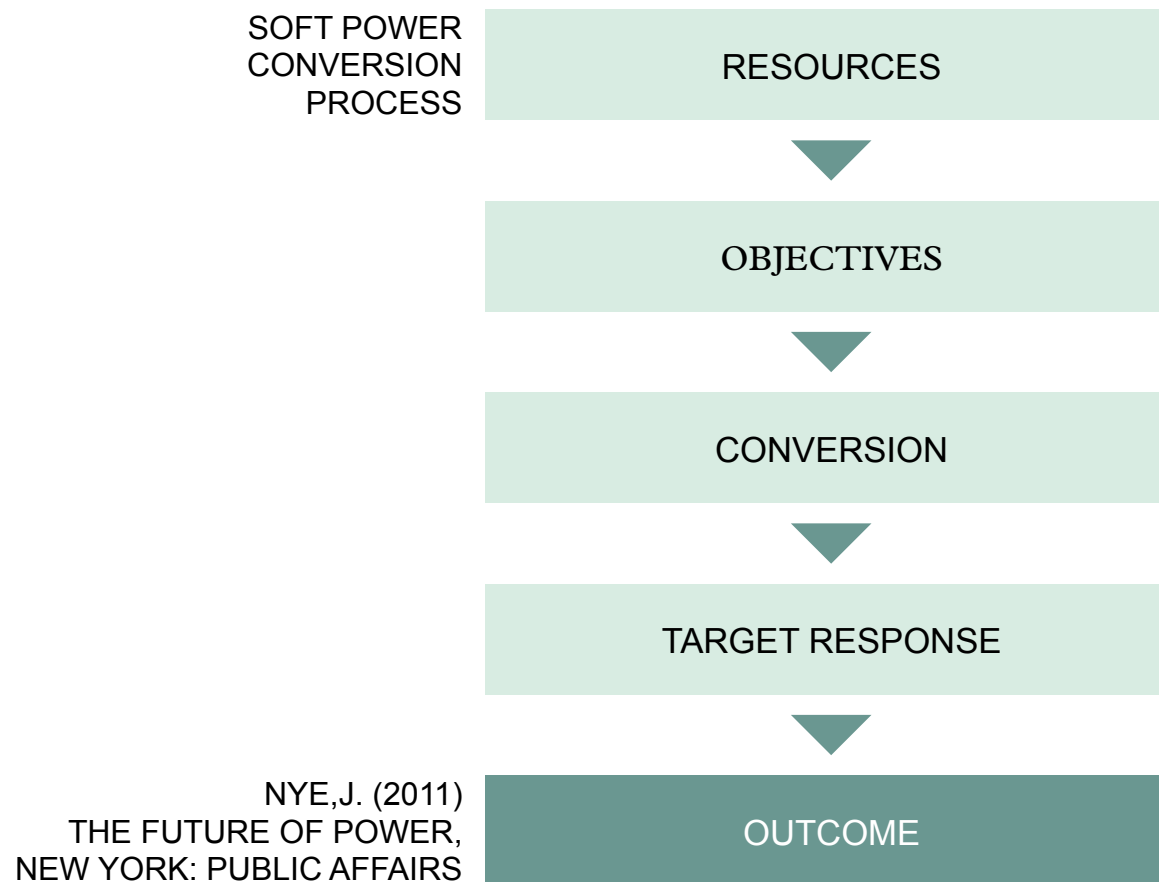
NO POLITICAL BAGGAGE
FROM FOREIGN POLICY

02

MEASURING SOFT POWER

Using soft power effectively starts with understanding what resources a country has at its disposal

“Only with a clear understanding of what soft power a country has, can it be deployed effectively”

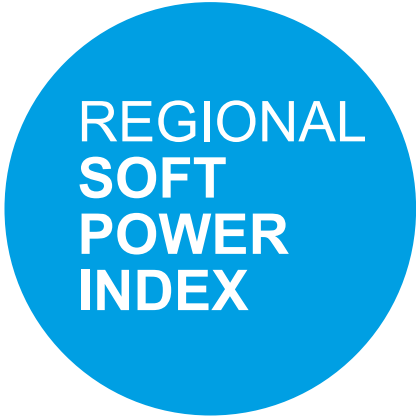


The Regional Soft Power Index follows a similar framework as The Soft Power 30 framework

The Soft Power 30 and Regional Soft Power Index both follow a similar framework, combining objective and subjective data



THE
SOFT
POWER
30



REGIONAL
SOFT
POWER
INDEX

The Regional Soft Power Index follows a similar framework as The Soft Power 30 framework: Objective data

Six separate sub-indices comprise the objective data.



ENTERPRISE



CULTURE



DIGITAL



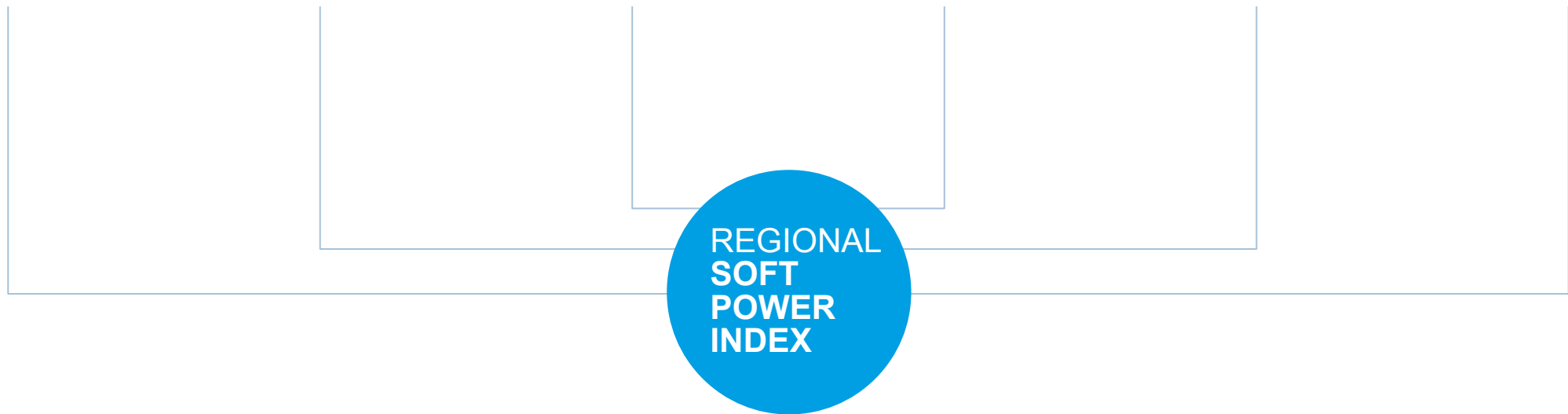
GOVERNMENT



ENGAGEMENT

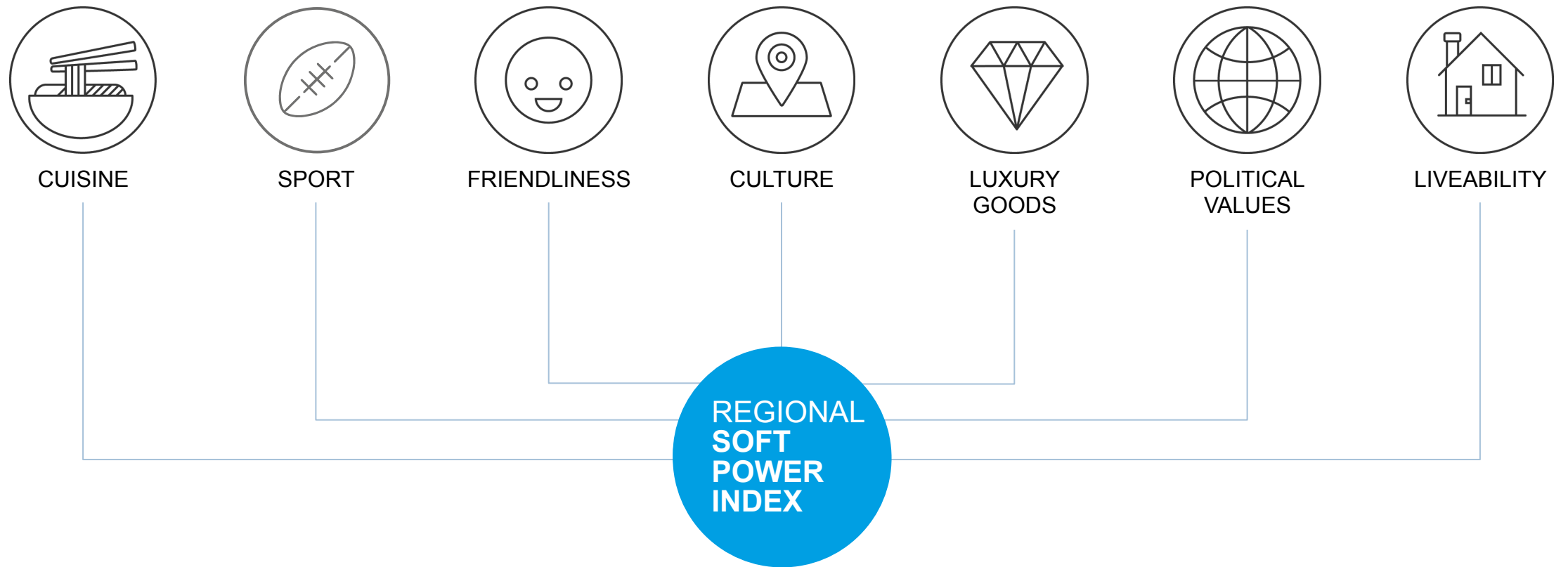


EDUCATION



The Soft Power 30 framework: Subjective data

Newly commissioned international polling across seven factors comprises the subjective data

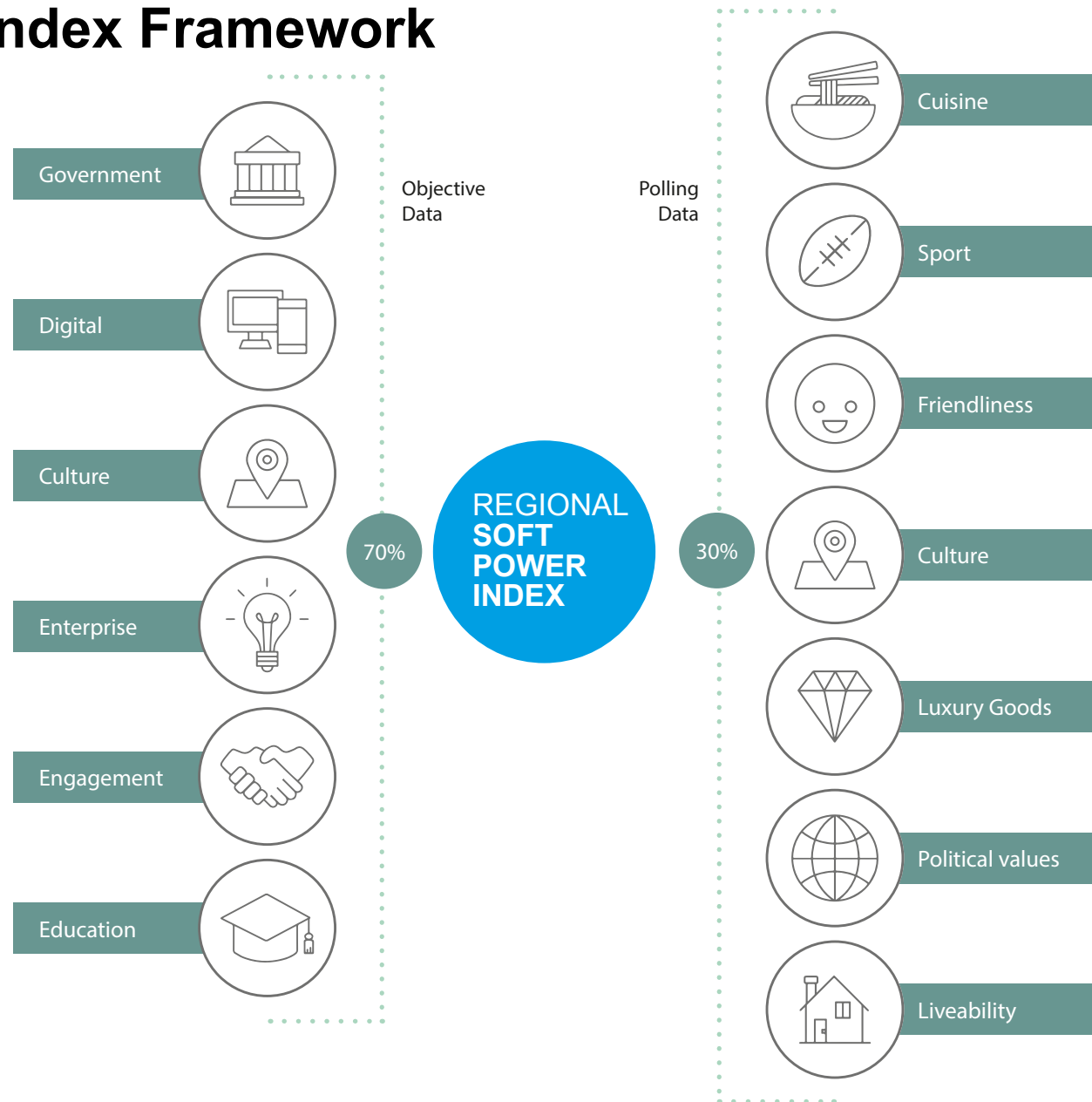


We polled 5,000 people across 10 countries to collect the subjective data for the regional soft power index



The Regional Soft Power Index Framework

The Regional Soft Power framework combines both objective and subjective data to measure and compare the soft power of 10 different regions.



In selecting the ten regions for the index, we started with Wales and then searched for similar regions

Starting with Wales, we selected nine other regions that were broadly comparable on several key factors:

- **Level of devolved authority**
- **GDP size**
- **Population size**
- **Level of development, and**
- **History of international engagement**



Moving from nation-state unit of analysis to a framework for regional governments is not without its challenges...

There were four main challenges the research team faced in constructing a soft power index for regions

1. Definition: What constitutes a regional government?
2. Comparability: Regions are not perfectly comparable in the same way nation-states are
3. Data availability: Different regions follow different standards and practices for collecting and publishing data
4. Awareness: There are varying levels of awareness of regions in the collective mind of global opinion

03

THE RESULTS

2018 Regional Soft Power Index

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%



QUEBEC
STRONGEST IN:



GOVERNMENT



EDUCATION



ENTERPRISE



SCOTLAND
STRONGEST IN:



EDUCATION



ENTERPRISE



DIGITAL



**FLANDERS
STRONGEST IN:**



GOVERNMENT



CULTURE



ENGAGEMENT

04

HOW DOES WALES PERFORM?

Wales performance across the Regional Soft Power Index: Objective data



ENTERPRISE



EDUCATION



ENGAGEMENT



DIGITAL



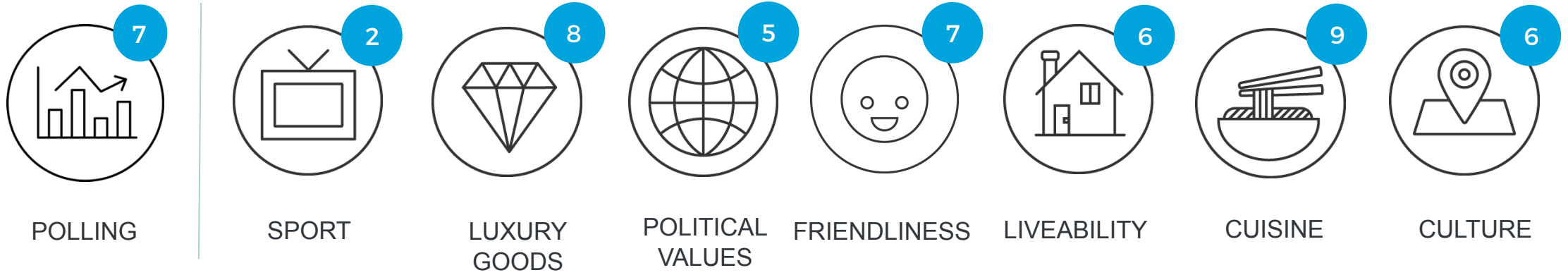
GOVERNMENT



CULTURE

- Wales is strongest in Digital, ranking 3rd over all for digital infrastructure and engagement with audiences on social media
- Enterprise is also a strength for Wales, ranking 4th. More needs to be done on R&D and fostering innovation, but on the whole, Wales has an attractive investment offer for many types of businesses
- Wales performs less well on Education. This is a reflection of fewer international students than other regions.
- But more could be done to promote Welsh universities and attract international students.
- Government, Culture, and Engagement show middling performance. Assets to build on, but clear room for improvement.

Wales performance across the Regional Soft Power Index: Polling data



- Wales is most positively perceived in terms of sport, ranking 2nd behind only Catalonia
- Wales gets a mid-table position for perceptions of Welsh political values
- In many ways, Wales is catching up on Devolution, so this could improve as Wales asserts more political autonomy
- Wales performs worst on cuisine and luxury goods
- Surprisingly, Wales underperforms on perceived friendliness and welcoming to tourists
- In aggregate, Wales's polling performance is not great, earning a ranking of 7th out of 10.

What do people associate with Wales?

As part of the international polling, we tested associations with each region.

For Wales we found:

1. Associations were relatively fragmented
2. No clear distinction between Wales and rest of UK
3. Opinions on Wales are perhaps fairly uninformed and potentially malleable



Five overall thoughts that come out of the 2018 Regional Soft Power Index

1	Overall awareness is a challenge for regions	Regions are on the whole at a disadvantage in terms of global awareness, compared to nation-states. They need to work harder to build global profile
2	History of non-state nation building helps	The top of our league-table is dominated by regions that have a history of building up a national identity through political, civic, cultural, and linguistic means
3	Greater autonomy = More soft power	Related to the above, higher levels of regional government authority correlate with greater soft power reserves
4	Wales starting from a decent base...	...but there is plenty of room for improvement. Focus should be on educational elements of soft power and on being seen as friendly and welcoming
5	Differentiation from rest of UK will be key	The association polling data shows Wales has a lot of work to do in raising profile and clarifying what sets it apart from the rest of the UK

05

RECOMMENDATIONS

How should the Welsh Government respond to the findings of this research?

There are good initiatives underway, but more can be done. Here are our key recommendations:

1. **Address the ‘friendliness’ issue** with a tourism campaign that puts Welsh people at the centre of video and rich media content – tell personal stories that highlight the spirit of Welsh hospitality
2. **Build on the Global Wales partnership** and scale up as soon as possible to attract more international students in key target markets
3. **Invest in a large-scale, on the ground public diplomacy campaign at the 2019 Rugby World Cup in Japan.** Start planning a “Wales House” in Tokyo now
4. **Overhaul the Welsh government’s management structure for international affairs with a dedicated directorate** that manages all international-facing issues, and **create a ministerial portfolio in cabinet**
5. **Leverage the Welsh language as a key differentiator for Wales** and champion both bilingualism and unique, endangered languages around the world

