



# Strengthening UK Soft Power: Strategic Recommendations

Proud co-covenantors:



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## Contents

1. Towards a Vision and Strategy for UK Soft Power
2. Mapping the UK Soft Power Landscape
2. The Role of Soft Power in Achieving the UK's Foreign Policy Ambitions
3. International and Domestic Dynamics Facing the UK's Soft Power Sector
4. Government Engagement on UK Soft Power
5. Conclusions and Recommendations

## UK Soft Power Group

The UK Soft Power Group (UKSPG) is the leading non-governmental organisation collectively representing soft power organisations in the United Kingdom. We represent many of the UK's most treasured, compelling and active soft power organisations and institutions, with a truly diverse membership spanning the full breadth of UK soft power. The UK Soft Power Group aims to amplify the voice of the soft power sector and increase its centrality to Government strategic planning, emphasising the value of soft power as a foreign policy instrument.

## UK Soft Power Group Members

- Academy of Sport
- Association of Chartered Certified Accountants (ACCA)
- Ascot Racecourse
- British Council
- British Film Institute (BFI)
- British Foreign Policy Group (BFPG)
- British Library
- British Standards Institution (BSI)
- City of London
- Coalition for Global Prosperity
- Core Cities UK
- The Jockey Club
- London Higher
- National Open College Network (NOCN)
- Premier League
- Royal Botanic Gardens Kew (RBG Kew)
- Science Museum Group
- UK Sport
- Wellcome Trust
- Wilton Park

**This report has been prepared by the UK Soft Power Group co-convenors, the British Foreign Policy Group and the British Council, on behalf of the Group. We are grateful to members of the UKSPG for their contributions and support in bringing this paper together.**

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# Towards a Vision and Strategy for UK Soft Power

Since 2023, when the UK Soft Power Group first developed a strategic framework for UK soft power, the international environment has become increasingly volatile.<sup>1</sup> Conflicts in Ukraine and the Middle East, growing trade wars, the decline of the multilateral system, the rise of new technologies, and the spread of populism have all contributed to an increasingly difficult and uncertain global future. This challenging geopolitical context has placed hard power at the forefront of global politics - and the UK's approach to it - in recent years. While there is a clear role and need for hard power in the current global context, the UK's position in the world is also contingent on its soft power, which is crucial for creating the conditions for strengthening the UK's alliances, diplomatic influence, and international credibility.

Soft power, as defined by Joseph Nye, is the ability to achieve a goal through attraction.<sup>2</sup> It encompasses a nation's culture, strengths, values and foreign policies and is central to how the UK is perceived internationally and its influence, role and opportunities in the global arena. The UK has long benefitted from a depth of soft power assets, which have helped shape and strengthen the UK's position on the world stage. These soft power assets have proved remarkably resilient in the face of significant domestic, political, economic and social change. However, while the UK is in an enviable position as an attractive and trusted international actor, this status is not guaranteed. The UK faces growing challenges, both domestically and internationally, that are impacting its soft power capabilities, and in an increasingly polarised world, the UK cannot simply rely on its past achievements to maintain its position. There is, therefore, a critical need for a clear plan on how to maintain and promote the UK's soft power strengths.

The UK Government has shrewdly recognised this fact since coming into office. Foreign Secretary David Lammy has emphasised that soft power is “fundamental” to the UK's influence in the world and that, successfully harnessed, soft power “can help to build relationships, deepen trust, enhance our security and drive economic growth”.<sup>3</sup> The creation of the UK's new Soft Power Council and the development of a new soft power strategy demonstrate this commitment and will provide an opportunity to strengthen connectivity and strategic thinking between Whitehall and the external soft power ecosystem.

The UK Soft Power Group welcomes these commitments, which respond directly to some of the key recommendations of the sector, including this Group.<sup>4</sup> The UK Soft Power Group stands ready to support the Government in designing and delivering these initiatives and to help capitalise upon this opportunity to strengthen UK soft power.

This paper builds on the previous framework set out by the UK Soft Power Group and responds to the Government's commitment to strengthen UK soft power. It aims to foster a shared understanding between the Government and the wider soft power ecosystem of the full scope of the UK's diverse and dynamic range of soft power assets and their

strategic utility as prominent components within the UK's foreign policy and diplomatic arsenal. It seeks to support the practical advancement of the Government's planning on soft power, following the creation of the new UK Soft Power Council. It also looks to support both the design and implementation phases of the new soft power strategy and to help guide thinking on the full spectrum of priorities, challenges and industries that should be included in the process. It makes the case for the Government to adopt and implement a whole-of-UK approach to soft power that accepts the independent nature and missions of the soft power ecosystem while facilitating long-term planning, enhanced dialogue with the sector, and cross-departmental coordination.

The UK Soft Power Group includes representatives from a wide range of industries, from culture and sport to education and governance. Collectively, these members possess vast international expertise, and have a strong stake in the UK's global image and influence. The Group, therefore, seeks to provide informed and judicious intelligence to support the development of soft power planning and create an environment that nurtures the growth and innovation of the UK's soft power assets.

In pursuit of strengthening the relationship between the Government and the soft power sector, and to harness the UK's soft power assets in support of the UK's international objectives, this paper's recommendations are as follows:

### **Recommendations**

- 1) Establish a formal Government engagement mechanism with the wider soft power sector, including the UK Soft Power Group, to run concurrently with the Soft Power Council. This should also include establishing a formal contact point in FCDO for the wider soft power ecosystem to connect with the Government.
- 2) Provide clarity on the Government's strategic priorities and long-term planning horizons and develop predictable funding mechanisms to encourage alignment between the Government and the wider soft power ecosystem, while ensuring an enabling environment for independent efforts.
- 3) Enhance connectivity between soft power assets and overseas Posts by better leveraging existing on-the-ground expertise, mechanisms and institutions.
- 4) Develop a 'digital gateway to the UK', a soft power digital platform where UK soft power assets can share resources, information on upcoming events and collaborate on projects to enhance the UK's global influence.
- 5) Develop provision for Whitehall Departments and devolved administrations to collectively address strategic issues and find practical solutions to opportunities and challenges in the soft power space, to improve Government's ability to speak with one voice to the independent sector. This should include the development of soft power training resources for departments across Whitehall and the devolved administrations.

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# Mapping the UK Soft Power Landscape

## Understanding Soft Power

One of the biggest challenges facing soft power is that the concept is often ill-defined and poorly understood. In short, though, and as Joseph Nye put it, soft power is the ability to achieve a goal through attraction.<sup>5</sup> It draws on both tangible and intangible resources - everything from the UK's rich cultural history and language to its higher education system, businesses, financial services, and media to achieve specific aims. It includes the UK's world-leading thinkers, creatives, and scientists, as well as its work within multilateral organisations, the sound functioning of the UK's institutions, the natural beauty of the British countryside, and much more besides. Collectively, these assets help define how the UK is perceived in the world and its ability to achieve its international ambitions.

Importantly, while resources like UK culture, values, and expertise provide governments with the currency and ammunition to achieve specific objectives, these assets alone do not constitute soft power. It is only when these assets are harnessed by the Government in pursuit of a specific aim that soft power is enacted. However, these assets must maintain their independence as soft power is most effective when soft power assets are not only utilised as tools of influence but also bring clear benefits be it through business, leisure, or otherwise, to those who engage with it. The Government's responsibility, through collaboration and cooperation with the sector, is not therefore to dictate the actions of soft power assets but rather to create an environment that is conducive for soft power assets to flourish and, in turn, to harness them in support of the UK's international ambitions.

## UK Soft Power Assets

The UK has a wealth of soft power, with deep roots and a significant presence on the world stage. It is consistently ranked among the world's most attractive nations. In 2023, the British Council found that the UK was the second most attractive G20 nation to young people across the group and in 2025 Brand Finance's Soft Power Index ranked the UK as the third most attractive nation brand.<sup>6</sup> While it can be difficult to measure how effectively this 'attractiveness' translates into soft power - i.e. something that can be leveraged for a strategic purpose - it is clear that the UK has a wealth of soft power assets that are well respected and well liked across the world and which act as a 'pull' towards the UK.

These assets are vast and deep. It is impossible to do justice to them all in this paper but below is a brief outline of some of these assets, designed to provide a snapshot of the immense impact and value the UK's soft power ecosystem holds.

## Culture

The UK has a rich and diverse culture, from its libraries and museums through to the royal family and the English language. The UK is home to 33 world heritage sites and 12 of 2023's 100 most visited museums globally.<sup>7</sup> According to the Anholt Nations Brand Index, the UK ranks 5th in the world for culture.<sup>8</sup> This depth of culture attracts significant global interest, be it through trade, tourism or cultural exchange. Independent UK museums, for example, contributed almost £900 million to the UK economy in 2023 and were visited by nearly 20 million people from all over the world, reaping benefits for both the UK's economy and its global influence.<sup>9</sup>

The benefits of the strength of UK culture extend well beyond the cultural industries themselves. For example, the English language is spoken by 2.3 billion people worldwide, and speaking the language increases the UK's attractiveness by 22%.<sup>10</sup> The pervasiveness of the English language also creates a significant market for English language teaching, which in 2018 was estimated to generate £1.4 billion for the UK economy annually. Institutions like the British Council play a central role in this sector, in supporting skills development and access to talent through English language learning, contributing an estimated £27.5 million to the UK economy.<sup>11</sup>

The widespread use of the English language also opens access to global markets for UK businesses and helps popularise the UK's arts and culture internationally, bringing further economic and strategic benefits.<sup>12</sup> It also improves the accessibility of UK media and supports efforts to tackle disinformation and provide trusted journalism through institutions such as the BBC World Service. The fact that most AI language models 'think' in English, presents opportunities for the UK to lead in technology and innovation as well.<sup>13</sup>

The diversity of UK society and heritage is also a crucial element of its culture. Global Future's 2019 survey found that nearly 70% of Britons agree that diversity has improved UK culture, while in 2022, three-quarters of Britons felt that social diversity was embedded in the UK's culture. The rich tapestry of cultural influences enhances the UK's global image, making it a more attractive destination for tourism, education, and business, and fostering an environment of inclusivity and mutual understanding. By embracing and celebrating its multicultural identity, and making more of its deep-rooted links across communities like the Commonwealth, the UK can leverage its diverse population to enhance its soft power on the global stage. There is a particular role too for the diaspora communities based in the UK who can act as positive multipliers for UK soft power. Through their vast and deep international networks, and proactive engagement with British life, not only do they strengthen the UK's domestic culture, they also help to build long-lasting ties between the UK and nations around the world.

Meanwhile, the British monarchy, one of the UK's most well-established cultural assets, delivers a similarly large global footprint. The late Queen Elizabeth II visited over 120 nations and hosted 112 state visits during her 70-year reign. These diplomatic engagements were frequently used to strengthen bilateral relations, and indeed, the

monarchy could be a powerful tool in improving relations with United States President Donald Trump, who is particularly fond of the royal family and King Charles III.<sup>14</sup>

On the world stage, the royal family also act as powerful ambassadors of 'Brand Britain', with their clothes, style and even the late Queen's preferences when it comes to dogs, providing opportunities to showcase the best of UK business, design and expertise. The monarchy's close ties to the history and tradition of British horseracing, for example, gives the sport a particular association with 'Britishness', a huge part of its appeal for international investors. The Royal Procession each day at Royal Ascot is one of the major draws for the international audience, broadcast to more than 180 countries worldwide.<sup>15</sup> The royal family, therefore, help to increase international spectator numbers, sponsorship revenue and interest in racing more generally, and underpin much of the international investment in British racing. Although estimates of the economic benefit of the monarchy vary significantly, they are, therefore, a powerful driver of interest in UK tourism, trade, sport, media and the arts.<sup>16</sup>

Importantly, it is not just the existence of the UK's cultural assets but also the values and behaviours they demonstrate that shape perceptions of the UK globally.<sup>17</sup> As international actors, their engagement in open and collaborative ways of working helps promote the UK's reputation as a benevolent and cooperative international partner. For example, the British Library delivers an intensive week-long International Library Leaders programme, offering the opportunity for library professionals from around the world to meet with experts, learn skills, and share and discuss experiences of dealing with the everyday issues facing the sector.<sup>18</sup> This principle of collaboration and openness extends beyond culture too, to other key areas of UK soft power, including science and the arts. The British Council, for example, delivers expertise and partnerships across arts, education, and English, reaching over 600 million people across 100 countries annually through trusted networks and long-term relationships built over 90 years.<sup>19</sup> By delivering on UK values of international partnership and collaboration, UK soft power assets help to reinforce the UK's reputation as a values-led international actor, strengthening the UK's legitimacy when promoting those values on the world stage.

### **Creative Industries**

The UK has a vibrant creative sector, from music, film and design, through to advertising, games and publishing. British artists account for one in every ten global song streams, the UK is the second largest exporter of TV programming in the world, and the Edinburgh Festival Fringe remains the world's largest arts festival.<sup>20</sup> The enduring popularity of the UK's creative industries speaks to how highly the UK's creative sectors are regarded internationally. Indeed, nearly three-quarters of global audiences recognise 'Britishness' as a mark of high quality in film.<sup>21</sup> As a result of their strong reputation, the UK's creative industries bring substantial economic benefits to the UK economy. Provisional data from the Department for Culture, Media and Sport (DCMS) found that in 2023, the creative industries added £124 billion in gross value to the UK economy.<sup>22</sup>



The quality and breadth of the UK's creative outputs also serve as a source of attraction to the UK, with 66% of people who have visited the UK citing seeing British locations and landmarks in film or TV as influencing their decision to visit. Furthermore, over 20% of those who consume British film or music state they feel more positive about the UK as a result. For the BBC, that figure is as high as 31%.<sup>23</sup>

Meanwhile, the UK fashion industry is also at the cutting edge. London Fashion Week is one of the 'Big Four' fashion weeks and British brands such as Burberry have huge global appeal, with a market capital of over £4 billion.<sup>24</sup> Alongside high street brands, these luxury brands comprise a huge industry in the UK, with the fashion and textiles industry contributing £1 in every £30 of HMRC's total tax receipts and providing 1.3 million jobs.<sup>25</sup> The global recognition of these brands not only brings significant economic benefits but also provides an opportunity to showcase British values and achieve key international objectives. For example, the UK has already built a strong reputation for itself at the heart of sustainable fashion, as a home to brands such as Stella McCartney, and the UK fashion industry is investing heavily in more sustainable practices, around which it has the opportunity to be a global leader, in line with the UK's climate ambitions.<sup>26</sup>

More broadly too, the creative industries can act as a canvas for promoting UK values on the world stage. From the inclusion of storylines about gender equality or democracy in books, TV and film, to efforts to encourage diversity in media and publishing, when people consume outputs from the UK's creative industries it not only impacts their perceptions of the UK but also of the ideas present within those outputs, creating opportunities to promote British and global values.

### **Education, Science and Innovation**

The UK boasts a highly respected education sector. It is home to four of the top ten universities in the world, and, in 2021, 84% of UK university activity was deemed world-leading.<sup>27</sup> This drives significant economic benefit for the UK. For 2021 alone, total UK revenue from education-related exports and transnational education activity was estimated to be £27.9 billion. It has also been a significant area of growth for the UK in recent years, with the real value of such exports and activity increasing by 81% between 2010 and 2021.<sup>28</sup> Furthermore, once wider direct and indirect economic impacts are accounted for, such as on real estate, services and transport, in the 2021/22 academic year, higher education contributed £71 billion in Gross Value Added (GVA) and £116 billion in general economic output to the UK economy.<sup>29</sup>

The UK's education and research institutions attract talent from across the world, nurturing vast networks of international exchange of ideas and people. Education helps promote a particularly deep understanding of a nation's culture and values, as students go beyond mere familiarity towards establishing deep relationships across national boundaries. International students and researchers, therefore, often leave with a strong sense of cultural and national affinity for the UK, making them more likely to return as tourists or as skilled migrants.<sup>30</sup> For example, polling of 'Alumni UK' members,



the largest global network for international UK alumni, found that 79% of Alumni UK respondents thought the UK was a force for good in the world, compared to 57% of those in the British Council's wider global perceptions survey.<sup>31</sup>

With the UK higher education sector attracting the best and the brightest from around the world, this strong connection can be particularly powerful. Indeed, as of October 2024, 58 serving world leaders were educated in the UK, second only to the United States.<sup>32</sup> This is a unique asset in diplomatic and foreign relations that the UK should seek to maintain and leverage. There have been some efforts to do so. In June 2024, Wilton Park hosted an event on knowledge diplomacy and the role of higher education in the new geopolitical era, which highlighted the role of universities and knowledge diplomacy actors in supporting bilateral and multilateral relations, as well as strengthening sub-national regional, state and city linkages. This is an important start to the conversation and provides the foundation upon which to build a more coherent strategy around UK knowledge diplomacy.

The UK also boasts a variety of professional bodies which offer globally recognised qualifications to students around the world. ACCA, for example, has over 252,000 members and 526,000 future members across 180 countries, including within overseas national and local governments, supreme audit institutions and major multilateral institutions. The global reach of UK professional bodies and their widespread recognition raises international recognition of UK excellence when it comes to professional services and increases the appeal of working and doing business with the UK.<sup>33</sup>

Surrounding, and in part as a result of, this excellence in education, is a thriving science, innovation, and research and development infrastructure. It is an environment that is built upon decades of scientific rigour and a strong peer-to-peer reputation that the UK continues to uphold. The UK is home to globally leading R&D institutions such as the Francis Crick Institute, the MRC Laboratory of Molecular Biology, the Roslin Institute, and DeepMind and for the last decade, the UK has consistently ranked first for research quality among the G7 nations. The UK also possesses well-developed industry knowledge in sectors such as renewables, space, Artificial Intelligence (AI) and vaccine technology, and has the capacity to harness these sectors effectively both for innovation and for achieving wider UK domestic and international objectives.<sup>34</sup>

For example, scientists at the University of Oxford's Jenner Institute pioneered the new R21 malaria vaccine, while British pharmaceutical and biotechnology company GSK developed the RTS,S malaria vaccine. These vaccines are critical innovations that will support global efforts to end malaria, which still kills around half a million people a year. This success is down to the excellence of UK science as well as extensive investment in malaria vaccine research, with the UK the third largest investor in malaria vaccines globally. The global rollout of the vaccines is an opportunity to showcase UK strengths in science and technology, as told in the Science Museum's Injecting Hope project with China and India, but is also an opportunity to support the UK's international development objectives and to improve perceptions of the UK internationally.<sup>35</sup>

### Sport

Sport is a key pillar of connectivity across cities, communities, nations and cultures.<sup>36</sup> The UK has a strong sporting reputation and is home to some of the world's most iconic sporting stars, teams and venues, as well as world-class sport production and analysis capabilities.

UK sport is particularly powerful for its ability to pull in large international crowds. Worldwide, 1.87 billion people regularly follow the Premier League, and it is broadcast into 189 out of 193 United Nations member states. As a result, it tops the British Icon Index, and is viewed very favourably across the world, particularly among young people. This has positive consequences for the UK too, with 97% of people interested in the Premier League saying that the Premier League makes them think better of the UK.<sup>37</sup>

Major sporting events also drive significant global attention. Royal Ascot in 2023, for example, was broadcast into 176 territories, with an estimated global household reach of 1 billion and a peak audience of 1.25 million on ITV. A further 260,000 people attended the five-day events.<sup>38</sup> The significant global attention major sporting events garner can also help drive positive perceptions of the UK. The London 2012 Olympics and Paralympics, which were watched by more than 50% of the world's population, are a powerful example of this. After the Olympics, 36% of viewers stated that the Games had made the UK more attractive as a place to study or do business, and 35% of viewers stated they were now more likely to visit the UK. The Games also facilitated broader cultural programmes, such as the Cultural Olympiad and the 'UK Now' arts and culture programme in China, which have further strengthened opportunities for cultural exchange.<sup>39</sup>

Sports diplomacy can also act as a powerful soft power tool at the devolved level, serving as a low-risk and relatively low-cost route by which the devolved nations can raise their international profile. When the Welsh men's football team participated in the 2022 FIFA World Cup in Qatar, the Welsh Government hosted a series of international events via the Welsh Government's Overseas offices, enhanced its marketing campaign in key markets include the United States, Qatar and parts of Europe, and introduced a number of Lleisiau Cymru World Cup Ambassadors who worked to raise Wales' profile internationally. These activities helped increase traffic to the wales.com website by 600% during the World Cup, improved perceptions of Wales and led to strengthened international networks, including at a Ministerial level, in a range of fields including business, science and the arts.<sup>40</sup>

### Governance and Values

The UK is the home of vital expertise in standards, regulation and governance. It houses over 90 regulatory bodies, including world-renowned institutions that bring a wealth of knowledge and provide the UK with a strong track record in this field.<sup>41</sup> These institutions serve to enhance bilateral relations, create more resilient and sustainable supply chains, support a better regulatory environment for UK exports and strengthen UK influence in a wide range of sectors.

For example, the British Standards Institution (BSI) provides a means for UK businesses and organisations to influence global best practice through standards. It is one of the six permanent governing members of the two principal international standards organisations recognised by the WTO - the International Organization for Standardization (ISO) and the International Electrotechnical Commission (IEC). As a result, many of the world's most-used standards originated in the UK. For example, in 2018, the Age Verification Providers Association worked with BSI to develop the international standard for conducting age verification. The model is used across the world and is a major UK export success story.<sup>42</sup>

Supporting these standards are professional bodies such as ACCA, which plays a key role in advocating for good governance, robust financial information and transparency in standards, from its platform in key international forums like the International Federation of Accountants and the Confederation of Asia Pacific Accountants. ACCA works to advocate for robust standards implementation at a strategic, governmental and institutional level, and has supported the global implementation of financial standards with initiatives such as its collaboration with Somalia's Central Bank (CBS), to deliver consultancy services and training to support CBS on its road to International Financial Reporting Standards compliance. This work is key in extending the visibility of the UK's values and its commitment to robust regulation within key markets and forums.<sup>43</sup>

UK leadership in governance, regulation and values also helps strengthen other key areas of the UK economy. For example, the UK's role in setting financial regulation, through both the Financial Conduct Authority (FCA) and Prudential Regulation Authority, is of particular importance in maintaining the UK's position as a global financial hub. The FCA has strong international influence in standard-setting bodies, such as the European Securities and Markets Authority, helping to ensure that UK interests and values are reflected in global financial regulation.<sup>44</sup> Furthermore, the UK's convening power through institutions such as Wilton Park reinforces the UK's role as a trusted and neutral facilitator in institution building, governance and regulation, by bringing together key actors for high-level policy dialogues.

The UK also has a strong reputation for its commitment to international law, human rights and addressing global challenges. This reputation has been built through decades of genuine commitment to international development and multilateralism, which have reaped significant rewards in terms of international public perceptions, as well as in the UK's ability to influence and lead on the world stage. For example, UK-funded programmes like Gavi, the Vaccine Alliance, and the Global Fund to Fight AIDS, TB, and Malaria, have received international praise in multilateral forums such as the United Nations and the G7. Leaders in these forums often cite UK aid as pivotal in advancing global health and development goals, supporting the diplomatic relationships that the UK needs for its security, economic and other foreign policy goals. Indeed, research shows that young people's view of UK aid and development is a key driver internationally of trust in the UK Government.<sup>45</sup>

This strong reputation in global regulation, governance and values provides an opportunity for the UK to take on a global leadership role in a wide range of sectors. For example, the UK's reputation in global regulation and standards could be leveraged in support of the Government's AI Opportunities Action Plan, and will strengthen the UK's ability to take on a leadership role when it comes to global AI governance, as was seen at the AI safety summit. Through BSI, the UK is already advancing global standards development for the risk management, explainability, bias and functional safety of AI. The UK has also taken on a leadership role in quantum standards development at the international level.<sup>46</sup> By harnessing domestic expertise in governance, the UK is therefore able to position itself as a nation with a strong reliable rule of law and instil partners with confidence in the regularity and stability of engaging with the UK, as well as encouraging strong international commitments to open, fair and transparent cooperation on trade and governance for the benefit of all.

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# The Role of Soft Power in Achieving the UK's Foreign Policy Ambitions

The UK Government has presented a clear foreign policy vision for its time in office, centred around the concept of 'progressive realism'. Core to the new Government's ambitions is a recognition that the world is increasingly fractured and geopolitically turbulent, and that the post-Cold War peace is over. As such, it has adopted a realist approach to foreign policy - "taking the world as it is not as we wish it to be" - and accepting that global actors will often act in a self-interested manner but seeking to leverage those motivations to achieve progressive ends.<sup>47</sup>

The Foreign Secretary David Lammy has also set out his priorities within this vision. These include boosting UK economic growth, protecting UK national security, strengthening the UK's relations with Europe, tackling climate change and advancing global development. Across all of these priorities, the UK's vast and deep soft power assets are already delivering on these objectives and, successfully leveraged, they have the potential to become even more valuable and prominent components within the UK's foreign policy and diplomatic arsenal.

## Boosting Economic Growth

The UK Government has put driving economic growth at the heart of its ambitions for its time in office, and with the geopolitical environment blurring the boundaries between foreign and domestic policy, it is increasingly understood that UK foreign policy must also deliver economic benefits at home as well.

From education to sport and cultural institutions, the UK's soft power resources are foundational to the UK's economy. There are not currently any metrics that fully capture the economic value of the UK's soft power, in large part because the sector is so broad and because its economic impacts are so diffuse, which makes it difficult to measure. Indeed, simply quantifying the direct economic value of the soft power ecosystem fails to fully capture the broader economic advantages generated from, for example, the strong global influence, positive reputation, and trade and investment opportunities that soft power can foster.

It is beyond the scope of this paper to find a new way by which to measure the full economic impact of soft power. Nevertheless, there is sectoral data available which captures some of the extensive economic impact of the UK's soft power. Provisional data from DCMS put the collective contribution of its sectors (civil society, creative industries, cultural sector, gambling and sport) at £167.4 billion in 2023, which is 7.1% of UK GVA. This includes a £124 billion contribution from the creative industries, £35 billion from the cultural sector and £20 billion from sport. Tourism is not included in the provisional 2023 figures due to data lags but in 2021 it contributed £15.9 billion to the UK economy, and the figure is now expected to be much higher (closer to the £67.5 billion generated in 2019) now that tourism has rebounded post-pandemic.<sup>48</sup>

Meanwhile, in 2021, total UK revenue from education-related exports and transnational education activity was estimated to be £27.9 billion, while the digital economy contributed £158.3 billion in 2022. Furthermore, in 2022, research by the CEBR found that standards make an £8.8 billion annual contribution to the UK economy, while accountancy contributed £80.7 billion to UK GDP in 2022. As such, while difficult to quantify, it is clear that UK soft power assets make a significant contribution to the UK economy, both directly and indirectly.<sup>49</sup>

Soft power sectors are also areas of potential growth. While hit sharply by both the Covid-19 pandemic and the cost-of-living crisis, the creative industries have historically been an engine of UK growth, and from 2010 to 2019, they grew more than one and a half times faster than the wider UK economy. With support, including the plans outlined in the Government's new Sector Plan for the Creative Industries, there is significant opportunity for the sector to be a major driver of growth again. There is a particular growth opportunity to be seized in how the Covid-19 pandemic accelerated changes in consumer habits, particularly through the rise in online consumption of the creative industries, creating opportunities for the UK to leverage its global technological leadership to increase growth in the sector.

Meanwhile, between 2010 and 2022, the sports sector grew by 32.2%, outpacing the growth of the economy more broadly (21.5%). Sports leaders expect the sports sector to grow a further 7.3% in the next 3-5 years, with double-digit growth expected in women's sport, an area in which the UK has thrived thanks to the success of female sports stars such as the Lionesses and Emma Raducanu.<sup>50</sup> Given the growing interest internationally in women's sport, there is a significant growth opportunity to be harnessed through the hosting of major women's sporting events and by crowding-in investment into women's sport in the UK. Beyond the economy, such investment in women's sport would also send clear signals about the UK's values on the global stage, given the significant gendered inequalities that persist in sport.

Soft power also reaps economic benefits far beyond the sector itself. Soft power is fundamental in fostering economic opportunities and linkages abroad. Hosting major sporting events (MSEs) positively impacts international trade and investment, and the UK's 2020 - 2030 MSE pipeline is expected to deliver at least £7 billion in expenditure-driven economic impacts and £4 billion through trade and investments. Economic benefits from these events can materialise through immediate commercial opportunities. Following the London 2012 Olympics, UK businesses secured over 60 contracts for the Sochi 2014 Winter Games and the Russia 2018 World Cup. They can also emerge indirectly, through improved international perceptions and awareness of host localities which, in turn, enhance future diplomatic and economic exchanges. In total, over £14 billion worth of trade and investment benefits were generated by the London 2012 Olympics and Paralympics.<sup>51</sup>

This multiplier effect is visible across the soft power sector. Research shows that taking part in a cultural activity increases intention to do business or trade with the UK by 7%, or by 9% if this is a British Council activity. It also increases the intention to study in the



UK by 9% and the intention to live or work in the UK by 9%, providing benefits across the UK economy. Meanwhile, the strength of the UK's higher education sector enables the commercialisation of research and growth of spinouts, reaping significant economic rewards and strengthening the UK's global impact.<sup>52</sup>

Similarly, the UK's strong reputation in governance and standards-setting helps reap economic rewards beyond the sector, not least for the reputation it builds for UK competence in professional jobs such as engineering, law, and accountancy. As respected leaders in the standards-setting and knowledge economy, UK institutions and workers are regularly called upon to consult on multinational issues, lead on overseas projects and to build collaborative relationships with foreign organisations, ensuring strong UK commercial representation and influence globally, and in turn helping to boost the UK's ability to attract further opportunities. Moreover, this professional competence also helps boost the attractiveness of London, and the City of London, as a resilient commercial and financial hub for international investment and development.<sup>53</sup> As such, UK standards and governance have impacts well beyond the sector. Indeed, the accountancy profession, and its regulation, underpins the critical delivery of the seven other growth-driving sectors identified in the Industrial Strategy.<sup>54</sup>

These economic relationships can also help strengthen bilateral relationships as well, complementing and supporting wider foreign policy objectives. Sector-level data relating to the horse racing industry can help to quantify this in real terms. Using the specific example of America, across all Tattersalls sales in 2024, £35 million was spent by buyers from the United States on 139 horses, an increase of 45% compared to £24 million spent in 2023 on 110 horses. This pattern of growth has been in existence for some time and is driven by a desire from American owners to have horses bred from British bloodstock and also to have them race in Britain, with the ambition of having runners in races like The Derby at Epsom, at Royal Ascot and other prestigious meetings.<sup>55</sup>

From the macro to the local, the prosperity that soft power assets drive also has very tangible impacts on local communities. Cultural and creative institutions play an important role in the renaissance of an area, positively impacting the economy and driving international tourism, talent and investment to new areas. Council-run museums in Leeds, for example, generated £41.7 million for the local economy in 2023, generating £8 for every £1 invested, driving inward investment and creating local employment and education opportunities.<sup>56</sup> Meanwhile, Bristol's film expertise has seen it internationally recognised as a UNESCO City of Film, and it attracts thousands of international visitors every year to its 11 annual international film festivals. In turn, in 2023/4, film and TV production contributed £30 million to the Bristol economy.<sup>57</sup>

Elsewhere, Liverpool's long-term cultivation of cultural assets led to the city being crowned as 2008's European Capital of Culture, which resulted in a £1.6 billion return on investment and visitor spending regionally, and has seen the city consistently positioned as the fifth most visited UK city among international visitors.<sup>58</sup> Liverpool's cultural offering also played a key role in it winning its bid to host the 2023 Eurovision Song Contest on behalf of the UK. Not only did hosting the contest deliver a £54 million



economic boost to the Liverpool city region, but it also placed Liverpool firmly on the world stage as a host and hub for culture, with the potential to attract future cultural opportunities as well.<sup>59</sup>

### Supporting International Peace and Security

UK soft power is multifaceted in its ability to, directly and indirectly, strengthen the UK's security resilience. While 'hard power' tends to be top of mind when it comes to defensive capabilities, particularly in the current geopolitical context, combinations of both hard and soft power are critical to improving domestic and international peace and security. On the soft power end of defence, this includes the UK's historic military and security expertise, its longstanding commitment to multilateralism, the active championing of the rules-based international system and collective action on global issues, which have together built the UK a reputation as a reliable partner in global governance and defence. It is also important to note that some security assets and interventions that are traditionally grouped as 'hard power' can also initiate soft power outcomes. While using force, the threat of force, economic sanctions, or inducements of payment to achieve a goal are considered 'hard' methods of power deployment, these actions also demonstrate and reflect UK societal values internationally, and can, in turn, bolster the UK's influence and soft power on the global stage.

The UK's response to Russia's invasion of Ukraine is an excellent illustration of this intersection between hard and soft power, and the UK's soft power ecosystem has played an important role in the UK's support for Ukraine. Immediately after the invasion, the BBC World Service revived its second World War-era shortwave broadcasts into Russia and Ukraine, helping to tackle disinformation and provide valuable impartial news at a time and in a region where it was in short supply.<sup>60</sup> Meanwhile, the British Council runs a People-to-People programme in the Baltic States, which has engaged 750,000 people, equating to 15% of the population in Lithuania, Latvia and Estonia, working to strengthen social cohesion and counter disinformation linked to Russia's invasion of Ukraine.<sup>61</sup>

Outside of information provision, UK science has developed a new Grain Verification scheme for Ukraine to track grain stolen from the occupied territories, bolstering Ukraine's economic security, as well as global food security, while Ukrainian cities have reached out to UK cities for support with reconstruction and rehabilitation, as well as links on culture, education and business. Meanwhile, actors like Wilton Park have played a crucial convening role, gathering stakeholders to work towards the recovery, reconstruction and reform of Ukraine in the wake of the war.<sup>62</sup> A key reflection of the intersection of hard and soft power is the inclusion of 'social, culture and sport' as a pillar of the UK's '100 year partnership' with Ukraine, reflecting the key role soft power will play in supporting an inclusive and sustainable recovery for Ukraine, and ultimately its long-term security.<sup>63</sup>

The UK's support for Ukraine - both military and otherwise - has, in turn, also helped derive soft power benefits. The UK's strong and swift response to the Russian invasion

of Ukraine has strengthened the UK's reputation as a reliable state that will act quickly and energetically in a crisis, securing the confidence of our European allies and working as an active deterrent to potential rivals. Three years into the war, the UK continues to lead on support for Ukraine, as one of Ukraine's biggest donors and as co-lead of both the international drone and maritime coalitions.<sup>64</sup> These commitments help inspire confidence domestically and internationally in the UK's institutional security capabilities and global leadership. This is critically important at the moment as European allies face increased pressure, particularly from United States President Donald Trump, to scale up investment in European security. In Ukraine, it has been made clear how UK hard and soft power can be mutually reinforcing, providing significant benefits for the UK's position on the world stage and its ability to support its allies.

Beyond Ukraine, soft power has a critical role to play in promoting peace. The UK's reputation for military leadership grants it the ability and opportunity to train and support other militaries, inculcating a sense of British values and culture and encouraging the use of British standards and principles in military training and conflict prevention to the benefit of all. For example, the British Peace Support Team, based in Nairobi, Kenya, trains African militaries to become trainers themselves. By bolstering the training of militaries across the world and building robust links between people and states, the UK can work to enhance security and peaceful co-existence globally.<sup>65</sup> Meanwhile, conflict and humanitarian UK NGOs such as the Mines Advisory Group work at the intersection of hard and soft power. Through the clearing of mines, the Group helps to enable people across the world to return safely to their homes and lives, helping to directly reduce conflict and promote peaceful post-conflict livelihoods.<sup>66</sup>

Key British sporting and cultural institutions also play an important role through education, de-escalation and training programmes in areas of instability in the world.<sup>67</sup> For example, Premier Skills, co-organised by the Premier League and the British Council, uses football as a means of building skills and challenging stereotypes, providing positive pathways for grassroots coaches and the marginalised young people they engage. Premier Skills is tailored to address key social issues such as violence against women and girls, female participation in sport, and educational opportunities for disadvantaged youth. The programme has provided positive opportunities for 1.7 million young people across 27 nations since it began in 2007. Sport also plays a vital role in protecting the UK's security by strengthening international relationships and building trust between nations.<sup>68</sup>

UK soft power is also able to subtly build bridges and facilitate cooperation on a smaller, localised scale with nations that the UK may otherwise struggle to engage with. This is particularly important in the current geopolitical environment, in which the space for dialogue and cooperation is shrinking.<sup>69</sup> RBG Kew, for example, has one of the longest-running Memoranda of Understandings with the Chinese Academy of Sciences, and houses one of the largest collections of Chinese traditional medicinal plants in the world, opening up opportunities for further engagement with China.<sup>70</sup> Cultural organisations can capitalise on their independent or arms-length

body (ALB) status to build people-to-people links and institutional collaboration and exchange in nations where formal diplomatic relations have been fraught. The work such organisations do to promote understanding and respect for other cultures, especially those of diaspora communities in the UK, can also help promote national and international stability and security.

With governments across the world increasingly aligning their soft power and cultural relations approaches more closely with their foreign, trade and development policy, soft power assets are becoming an increasingly powerful tool through which the UK can engage with a wide range of partners.<sup>71</sup>

### Resetting Relations with Europe

At the heart of the Government's foreign policy lie plans to reset relations with Europe and to reaffirm the UK's position as a "reliable partner, a dependable ally and a good neighbour" to Europe.<sup>72</sup> While relations with Europe have improved in recent years, following the agreement of the Windsor Framework, and the necessity for cooperation stimulated by both Russia's invasion of Ukraine and the United States' decision to step back from the multilateral world order, the reset will not be without difficulty. It is essential therefore that a basis of mutual trust and goodwill is built between the UK and our European partners as the reset unfolds.

Here, there is a clear role for UK soft power. Despite some of the challenges in relations between the UK and Europe in recent years, cultural, business and people-to-people links have endured. In 2023, seven of the ten countries whose residents visited the UK the most were EU countries. This tourism helps drive positive perceptions of nations and has helped to maintain positive people-to-people links upon which both the UK and EU member states can continue to build public support for closer relations.<sup>73</sup> Similarly, the UK's hosting of the 2023 Eurovision song contest, the final of the 2020 men's UEFA Euros, as well as wider regular events that are highly popular with Europeans such as Glastonbury Festival and the Edinburgh Festival Fringe, have enabled a strong foundation of cultural exchange to endure, upon which wider relations can be built.

This foundation has been further strengthened by the conscious efforts by UK soft power assets to collaborate extensively with European nations and counterparts. British Council cultural seasons have generated a wealth of opportunities for collaboration with European partners across arts and culture. For example, in 2024, the UK-France Season delivered over 65 events in 43 cities in France and the UK, reaching 461,017 people live, and a further 21.6 million in media coverage. Similarly, its Cultural Bridge programme with Germany reached 34,000 people and created 170 new partnerships.<sup>74</sup> Cooperation has also happened at a more ad hoc, organisational level as well. For example, the Science Museum Group's National Science and Media Museum are preparing for an upcoming exhibition on Eurovision which will involve European partners for content and potential touring opportunities.<sup>75</sup>

Meanwhile, the Wellcome Trust's continued support for European research projects has helped foster trust and mutual benefit, ensuring that UK expertise remains integral to shared scientific progress. Such research will now be made more viable now that the UK has returned to the Horizon Europe programme under a bespoke deal, something UK soft power assets, not least the higher education sector, helped to successfully advocate for. The existing research links that soft power assets have maintained have helped ease the transition into Horizon Europe and will enable the UK to build on its substantial research base, allowing universities to contribute towards solving global issues, meet foreign policy objectives, and drive growth in key sectors such as technology, renewable energy and sustainability, health, and more, across Europe and beyond.<sup>76</sup>

Furthermore, several soft power organisations have remained members of key European organising groups, which have helped maintain an important UK voice in a range of sectors across Europe. For example, BSI remains a member of the three European regional standards organisations. This enables UK-based organisations to contribute fully to the development of standards and, in turn, to design specifications that apply across Europe. Having the same standards as our European counterparts also greatly eases trade.<sup>77</sup> Similarly, ACCA is a member of organisations such as Accountancy Europe, the European Federation of Accountants and Auditors, SME United and the Federation of Mediterranean Certified Accountants. Through these memberships, ACCA is both developing opportunities for knowledge exchange and insight and contributing to the EU policy agenda.<sup>78</sup> These ad-hoc collaborations and engagements with European organisations lay important foundations for the closer collaboration the Government wishes to see across a broad range of areas.

Sub-national actors have also played a particularly important role as strong and tested avenues for collaboration across Europe, particularly when national diplomatic relations or resources are stretched. UK involvement in joint initiatives such as city-to-city twinning, the G7 Urban7, and the UK-France Local Government Forum, all provide opportunities to create meaningful relationships with fellow sub-national actors across Europe. This creates strong foundations for wider relationships and helps display UK expertise across a range of key areas, such as supporting the Sustainable Development Goals, addressing climate change, and advancing inclusive economic reform, all while supporting national government agendas.<sup>79</sup>

Meanwhile, Wilton Park - founded in the aftermath of World War Two, to promote democracy in Germany and build lasting peace in Europe - continues to host bilateral and multilateral dialogues between the UK and European countries and on topics relevant to European security, growth and prosperity. It also works with partners from European Governments on shared policy priorities, such as an annual human rights conference supported by the Swiss and Finnish Governments, providing opportunities for policy collaboration and knowledge exchange with European partners.<sup>80</sup>

Cultural relations engagements also create space for diplomacy to occur in a more relaxed environment and provide opportunities for Ministers and officials to develop more personal relationships. Prime Minister Keir Starmer's trip to Paris for the

Paralympics Opening Ceremony, for example, provided an opportunity for the Prime Minister to meet with French Prime Minister Emmanuel Macron very early into Starmer's time in office, and to secure commitments to strengthen UK-France ties across a range of critical areas.<sup>81</sup> Given the depth of UK arts, sports and cultural events, there are plenty of opportunities to replicate this success. The 2025 Women's Rugby World Cup or the 2025 World Boxing Championship in Liverpool, for example, could provide opportunities to more informally engage with foreign officials on home soil.

Looking ahead, the highly sought after nature of the UK's soft power assets could also serve as a valuable lever in any negotiation over the reset in the relationship. This is particularly evident when it comes to higher education. While down substantially from pre-Brexit levels, in 2022-23, there were still around 120,000 students from the EU studying in the UK. Given the sizable increase in tuition fees for EU students post-Brexit, the continued popularity of UK higher education across the EU is testament to its perceived value in the EU. Moreover, the EU's proposal for a new youth mobility scheme suggests a desire to create more avenues for young people to access British education and culture, which can be valuable leverage in negotiations.<sup>82</sup>

Beyond Europe too, UK soft power assets have strong relationships with partners among a wide range of UK allies, from the Americas to Asia and the Indo-Pacific. Across the world, these existing soft power relationships can be harnessed by the UK Government to strengthen the UK's international networks at a time of major geopolitical turmoil.

### **Delivering on UK climate and nature ambitions**

The UK's soft power actors are at the forefront of nationwide efforts to combat climate change, embracing and embodying the UK's long-term climate goals. From leading on the research required to build the evidence base for climate action, to convening key stakeholders to engage in meaningful discussions around climate change, or developing best practice to help nations meet their climate objectives, the UK soft power assets are working hard to tackle climate change and to strengthen the UK's reputation in this space. Their efforts to support the UK's climate agenda underscore the extent to which the soft power ecosystem stands as a committed and constructive ally of the UK Government across a broad spectrum of priorities.

Firstly, the UK's soft power assets are at the cutting edge of both climate research and delivery. RBG Kew works with over 500 scientists and over 400 institutions in over 100 countries to find solutions to support bioeconomies, restore habitats, and research nature-based solutions to tackle climate change and biodiversity loss. Examples of its vast array of programmes include mapping local biodiversity in countries, advising on protected areas and on the economic and societal uses of plants and fungi to support bioeconomies. Its Millenium Seed Bank, home to over 2.4 billion seeds, used for the restoration of habitats and for research into climate adaptation, is the largest, most diverse wild plant species genetic resource in the world, and helps protect biodiversity at risk of extinction.<sup>83</sup> Meanwhile, UK funders also play a critical role in climate research and delivery. For example, the Wellcome Trust provides crucial funds for projects



such as the Lancet Countdown, an international research collaboration which tracks climate change's impact on health, or the Malawi-Liverpool-Wellcome Programme which conducts crucial research on climate-related health challenges.<sup>84</sup>

Secondly, UK soft power actors are also enabling wider action on climate change. Institutions such as BSI are providing the frameworks which enable national and international commitments around climate change. For example, BSI has convened over 1200 organisations from 100 countries to develop the 'Net Zero Guidelines' which bring together existing best practice into a single set of guidelines that can be used by any actor type in any global jurisdiction, including policymakers and regulators. BSI is also now providing key support to the process to establish the first independently-verifiable international standard on net-zero.<sup>85</sup>

Similarly, alongside the Foreign, Commonwealth & Development Office (FCDO), ACCA is a framework partner to the International Sustainability Standards Board and is working to create and deliver cutting-edge learning, insights and guidance to support the adoption, implementation and application of the new standards.<sup>86</sup> Meanwhile, RBG Kew works with organisations such as Procter and Gamble, Marks and Spencer and Ikea on sustainable sourcing and supply chains, authentication of natural products in their supply chain, and traceability of products, to help other organisations to deliver on their climate ambitions.<sup>87</sup> Through support with funding, research and delivery, UK soft power assets are therefore able to have a multiplying effect when it comes to delivery of UK and global climate objectives.

Thirdly, the UK soft power ecosystem also plays an important role in public education on climate change through initiatives such as the Wellcome Collection's 'A Breath of Fresh Air' and the Science Museum's 'Our Future Planet' exhibition, the latter of which was adapted for touring in France and Portugal by the respective British embassies. This public education is essential for strengthening public support for UK climate leadership and for the Government's climate ambitions, and the British Council alone has directly engaged 22 million people in over 200 countries and territories on these topics through its portfolio of climate projects.<sup>88</sup> Meanwhile, soft power assets can also help strengthen support among politicians and officials. The Coalition for Global Prosperity, for example, hosts residencies and events for politicians on international affairs, including around climate action, providing them with real-world insight on its implications and helping secure strong political champions for UK climate leadership.<sup>89</sup>

As well as building support for climate leadership, soft power assets can also showcase UK leadership on climate change. The Science Museum's 'Energy Revolution: The Adani Green Energy Gallery', for example, explores how the world can generate and use energy more sustainably to limit climate change and achieve a low-carbon future. The very hosting of climate-focused cultural activities serves to highlight to international and domestic audiences the strong focus the UK has on climate action, but this gallery further reinforces this through its focus on UK innovations as well.<sup>90</sup> Meanwhile, the UK's sporting sector is pioneering sustainable practices, from net-zero stadiums to eco-friendly events, setting new industry standards worldwide. By embedding environmental responsibility across all levels of sport, from grassroots to elite competition, the UK

reinforces its commitment to addressing the climate crisis while inspiring international partners to follow suit.<sup>91</sup>

UK soft power assets have also played an important role in engaging with, and convening, global conversations on climate change, often on the fringes of global events. For example, Core Cities UK ran a series of joint events with partners, including KPMG and The Institutional Investors Group on Climate Change, at COP28 on facilitating innovation and technological solutions for bringing green and sustainable investment into cities.<sup>92</sup> In January 2025, the Government recognised the role of cities and subnational actors in delivering on a just net-zero transition, referencing the ambitious and innovative actions being taken by the UK Core Cities in its UNFCCC National Development Contribution (NDC) submission under the Paris Agreement.<sup>93</sup> Meanwhile, RBG Kew is able to leverage its strong convening power and neutral advisory position to regularly bring together senior leaders - including ministers - and to host WVIPs to help shape public opinion and policy on the biodiversity crisis.<sup>94</sup>

### Supporting International Development

Many of the organisations that form part of the UK soft power ecosystem have long been essential to the delivery of the UK's international development objectives. From the British Council's *EDGE* programme which builds English language, digital, and life skills for over 18,000 adolescent girls around the world, to the work of the Wallace Group which brings together eight of the leading 'sport' universities from the UK, to support the development of sport in Zambia through the Volunteer Zambia, actors engaged in UK soft power have a central role to play in providing development opportunities around the world.<sup>95</sup>

With the Government focused on a vision for international development that is underpinned by equitable partnership, there is an even stronger role for UK soft power assets to play in international development moving forwards. By leveraging UK strengths, these organisations provide key knowledge and expertise to other nations and offer capacity-building to support more equitable partnerships long-term. For example, there is a strong link between the use of standardisation and a country's economic development, and BSI has supported the capacity of National Standards Bodies across Africa, the Caribbean and Asia, enabling them to use and develop standards that can support their own nation's internal growth and trade objectives. This UK support is strongly sought after by our international partners.<sup>96</sup>

ACCA participates in similar capacity-building work, supporting the upskilling and development of national Professional Accountancy Bodies. This has very tangible consequences when it comes to international development. ACCA's partnership with the Ministry of Finance in Kazakhstan on Kazakhstan's International Public Sector Accounting Standards (IPSAS) implementation journey, for example, has helped government officials strengthen their professional knowledge and skills and has trained large cohorts in the sustainable adoption of IPSAS, which is central to the long-term success of Kazakhstan's financial services.<sup>97</sup>



Furthermore, actors enacting UK soft power have long embedded their strong local knowledge and skills into their work. For example, the Wellcome Trust has, for many decades, supported research programmes led from Kenya, Malawi, South Africa, Thailand and Vietnam. Today, each combines world-class discovery and clinical research, benefiting local, regional and global health. The Wellcome Trust also invests in organisations like the India Alliance and Science for Africa, which distribute the funds into research grants of their choice, using respective local experts, with oversight of the specific geographical contexts.<sup>98</sup> UK soft power assets then, are able to leverage UK strengths, partner with local organisations, and deliver international development in an equitable way, based on a sense of mutual partnership and respect.

The strong research focus of many of the UK's soft power institutions also enables them to act as a force multiplier, providing the research and evidence to strengthen the UK and wider global development work. The British Council's *Cultural Protection Fund*, in partnership with DCMS, uses a What Works approach to gathering and sharing research, evidence and learning, which serves to improve access to high quality usable evidence and learning in cultural heritage protection. Meanwhile, since 2010 its 'Next Generation' series has explored young people's values, aspirations and needs in countries in transition, such as Iraq, Kazakhstan, Brazil, Ukraine, providing valuable insights into the effectiveness of international development and the standing and relevance of the UK's offer.<sup>99</sup>

The UK soft power ecosystem is also crucial in building support for international development. Independent actors deliver important public-facing events and initiatives aimed at promoting education and support for the benefits of international development spending. From events and analysis from The British Foreign Policy Group, to a British Council exhibition on the importance and relevance of the Sustainable Development Goals, soft power assets can bring development issues to the fore of public discourse, and help to strengthen public support.<sup>100</sup>

Moreover, organisations such as the Coalition for Global Prosperity help drive political support for international development by hosting trips and residencies for cross-party MPs to educate policymakers and present first-hand the impact that international development can have in achieving the UK's global ambitions. Also, Wilton Park convenes senior Government, policy, academic and industry partners from the UK and overseas to help drive collaboration and coordination with key stakeholders from within Government and beyond. For example, in December 2024, Wilton Park brought together policymakers, experts and practitioners from across the world for a session to advance evidence-led and impact-driven development strategies.<sup>101</sup>

Soft power assets, therefore, have multiple roles to play in achieving the UK's international development objectives, from supporting capacity-building, to creating solutions to global health problems and providing public education. Embedding the values of equal partnerships and localisation, they are a powerful way to deliver on the UK's international development objectives, while staying true to the Government's values on international development.

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# International and Domestic Dynamics Facing the UK's Soft Power Sector

While the UK has a wealth of soft power, which it has benefitted significantly from over the years, soft power finds itself at a critical juncture. The global environment is increasingly contested, and allies and rivals alike are investing heavily in soft power. Economic development over recent decades, particularly in Asia, means that there is a greater range of attractive cultural, education and technology offers available for those who look abroad for connections. Meanwhile, in the UK, soft power has been consistently deprioritised and left vulnerable to domestic turbulence and short-termism. For too long our soft power has been taken for granted and the soft power ecosystem now needs urgent support in order to rise to current challenges.

## The International Landscape

Over the last few years, the global environment has become increasingly divided, and there is a growing recognition that the post-Cold War peace is over. The ongoing war in Ukraine, conflict across the Middle East, countless civil wars and the growing use of grey-zone warfare, have escalated global tensions. The election of President Trump in the United States has added further unpredictability to the global landscape.

Within this, there is an ongoing battle for ideas, ideology and values. And the liberal world order is struggling. In 2023, global freedoms deteriorated for the eighteenth consecutive year, 70% of the world's population now live in autocratic states, and 1 in 7 people are estimated to have been exposed to conflict in the year to July 2024.<sup>102</sup> The rise of populism and disinformation is deepening societal divisions, particularly where cultural, linguistic, religious, or political fault lines are exploited by hostile actors.

Concerningly, public commitment to liberal values is in decline. Indeed, more than 1 in 5 Britons aged 18-45 consider strong unelected leaders more effective at running a country than democratic leaders.<sup>103</sup> Meanwhile, globally, public commitment to press freedom, fair opposition, free religion and other core values are loosely held.<sup>104</sup> There are a multitude of drivers of this challenge - including both the growing soft power of illiberal states and actors, as well as a failure by the West at large to make a compelling case for its own values.

## The Challenges Posed by the UK's Strategic Rivals

One of the biggest challenges facing UK soft power is the significant investments being made by our strategic rivals into their own soft power. Recognising that, even in a hard-powered global environment, influence cannot just be won by defence or security, the UK's strategic rivals are seeking to strengthen their soft power influence, targeting a wide range of sectors including science, health, diplomacy and development, as well as standards-setting and global governance, to the detriment of the UK and its allies.<sup>105</sup>

## China's Soft Power

Turning first to China, and its pledge to a 'peaceful rise', now referred to as its 'peaceful development', was designed to rebut concerns that China's growing power would threaten the existing world order. Instead, China sought to position itself as a nation that avoids and prevents international confrontation and as a less aggressive international player relative to Western nations. This has forced it to focus heavily on soft power and particularly on economic investment, to win friends and allies around the world.<sup>106</sup>

China is, therefore, strategically leveraging scholarships, cultural festivals, and Chinese-sponsored media outlets to portray itself positively on the world stage. Meanwhile, its Confucius Institutes, which now number 500 across 160 nations, have been effective in spreading the Chinese language. Simultaneously, its Belt and Road Initiative, designed to fund infrastructure projects connecting China and the world, has expanded widely, and now has 150 members.<sup>107</sup>

These soft power initiatives have had their challenges. Chinese culture is yet to garner mass global appeal, and the Covid-19 pandemic and China's wider economic woes have limited the Belt and Road Initiative's impact in recent years. Nevertheless, China is able to present a very powerful soft power offer. In Africa, for example, China now has Confucius Institutes in over 50 countries, promoting Chinese language and culture, while media outlets like CGTN Africa seek to promote favourable narratives about China. China has also launched the '10,000 Villages Project', providing satellite infrastructure, complete with a subscription to StarTimes (a Chinese media company), to 10,000 remote villages across 23 countries in Africa. Moreover, over the last two decades, China has given approximately US\$182 billion in loans to countries across the continent, facilitating key investments in energy, transportation, mining and major infrastructure projects - all part of an effort to present China as a trustworthy alternative to Western partners.<sup>108</sup>

It is working. In 2021, an Afrobarometer survey of 34 African nations found that China was the nation most widely seen to have exerted positive economic and political influence in the nations polled.<sup>109</sup> China is also already leveraging these relationships for its strategic benefit. Between 2003 and 2018, Liberia, Senegal, Chad, Malawi, Gambia, São Tomé and Príncipe, and Burkina Faso all switched their diplomatic allegiances from Taiwan to China. Meanwhile, Eswatini - the last African nation to recognise and maintain diplomatic ties with Taiwan - has been excluded from Chinese economic investment.<sup>110</sup> These soft and economic incentives are working hard to win China friends and allies in Africa, a continent that is of growing geopolitical importance.

Meanwhile, in Southeast Asia, Chinese companies Huawei and ZTE continue to build 5G networks and China has established vocational training centres in the region to provide technical training for locals using Chinese technology and under Chinese standards.<sup>111</sup> Furthermore, seven of China's Belt and Road Initiative's top ten destinations for infrastructure investment are ASEAN member states. While public opinion on China is more mixed in Southeast Asia than in Africa, the Belt and Road Initiative is warmly

received. The 2024 State of Southeast Asia survey found that the majority of respondents from all ten ASEAN countries believe that the Belt and Road Initiative provides much-needed infrastructure development and will benefit ASEAN-China relations.<sup>112</sup> If the UK is committed to strengthening its relationships across the world, and building equitable partnerships, it will require tactful soft power investment, to build relationships with governments and publics alike and to compete with our rivals' soft power efforts.

### Russia's Soft Power

In part, Russia's invasion of Ukraine was the result of a failure of its soft power. Russian soft power in Ukraine, built around the concept of '*Russkiy Mir*', failed to persuade Ukraine to align with Moscow through peaceful means, with EU soft power and the promise of Ukrainian 'Europeanness' more appealing to Ukraine. Russian soft power took a further hit following the invasion of Ukraine, with Russia's 'reputation' ranking in one soft power index dropping from 23rd to 105th, and nations were quick to distance themselves from Russia.<sup>113</sup> However, three years on and Russia's strategic use of 'hard soft power' is helping it strengthen its international position once more.

In Africa, Russian President Vladimir Putin is utilising a powerful combination of both hard and soft power to strengthen relationships. President Putin has offered African leaders his "total support" in providing them with weapons as they look to tackle terrorism. A key part of Putin's offer is that, unlike the West, his support does not come with 'values' strings such as the need to uphold democracy, an offer which appeals particularly to juntas in the continent.<sup>114</sup> At the same time, Russia now hosts a regular flagship Russia-Africa summit, has expanded its language programmes to introduce Russian to the continent, and is attempting to grow the influence of the Russian orthodox church into Africa. Russia is also rapidly expanding its media and disinformation campaigns in the continent to strengthen support further.<sup>115</sup> As a result, public support for Russia has increased across a number of African nations and Russia has been rewarded with abstentions from much of Africa on key votes at the UN when it comes to Ukraine.<sup>116</sup>

Meanwhile, in neighbouring Europe, Russian soft power instruments are playing a key role in fostering mistrust towards the West. In Slovakia, pro-Kremlin propaganda has widely penetrated the information space, spreading narratives about the alleged oppression of the Russian minority in Ukraine, Western political and societal decadence, and allegations about the prominence of the far-right in Ukraine. Russia has reportedly leveraged embassies, spies, local collaborators, as well as media, to advance its goals, and position Russia as a protector of traditional values and a natural ally for Slavic nations. The result has been a striking shift in Slovakia towards Russia and away from the West. In the 2023 election, Slovakia's pro-Russian SMER-SD party received almost 23% of the vote in their parliamentary elections, and now Kremlin-friendly, populist Prime Minister, Robert Fico, adopts Putin-like rhetoric to undermine support for Ukraine, and aligns Slovakia closely with Russian interests.<sup>117</sup>

Russia then, is effectively leveraging a combination of both hard and soft power, within Europe and beyond, to destabilise societies and secure geopolitical support, particularly when it comes to Ukraine.

### Areas of UK Soft Power Under International Threat

As the above examples illustrate, there are a broad range of ways the UK's strategic rivals are seeking to win friends and allies and exert influence around the world. Some of these are soft - focused on the promotion of culture and media, others are economic - such as the promise of investment, and others move closer to hard power - like Russia's weapons provisions to African junta leaders. All, though, serve to increase global competition, including in regions and specialisms where the UK has long sought to exert soft power influence itself.

There are several areas where the threat posed by strategic rivals to UK soft power is particularly sharp, three of which are explored below - the provision of trusted news and media, science and technology and the multilateral arena.

### Media

The BBC is the world's most trusted international news broadcaster and has a huge global reach. The BBC's international news services - BBC World Service, BBC World News TV channel and BBC.com - reach 456 million people around the world every week in over 40 different languages. The provision of free, impartial media sends a clear global message about British values and has been directly linked to increased trust and intent to engage with the UK in the future. It also serves a critical international security role, ensuring that ordinary people all over the world receive accurate information about domestic and international events, particularly in environments where this is often in short supply.<sup>118</sup>

However, the BBC and other UK media outlets are operating in an increasingly contested media environment. Collectively, Russia and China are spending an estimated £6 - £8 billion in growing their global media footprint.<sup>119</sup> For China, the focus is on spreading positive messages about itself. State-run media outlets such as China Global Television Network (CGTN), China Radio International (CRI) and China Daily pump out messages about the effectiveness of China, its government, politics and economics, with an estimated 44% of the content on CGTN dedicated to promoting the Chinese model. CGTN is now available in 160 countries, while CRI alone broadcasts in more than 40 languages, reaching growing numbers of people around the world. In some Pacific islands, such as Vanuatu, Chinese stations are now among the most watched. This is having a direct effect, and exposure to messaging from Chinese media has been found to improve perceptions of the Chinese Communist Party and the Chinese model.<sup>120</sup>

Meanwhile, Russian media seeks to more proactively sow seeds of discontent and instability in nations, often through spreading mis- and dis-information. Russian propaganda networks are vast and in the Middle East, for example, RT Arabic, the Arab-

language branch of Russia's state-owned TV channel, is one of the most popular news sites in the region. Russia has leveraged this network to push anti-Ukraine sentiment and has launched disinformation campaigns to deflect responsibility for chemical attacks in Syria from the Syrian regime on to the West.<sup>121</sup> Meanwhile, in Europe, a Russian propaganda network was uncovered in 2024 in which European politicians were paid by the Voice of Europe website, run by a pro-Russian oligarch, to publish statements on the site, spread Russian propaganda and influence upcoming elections.<sup>122</sup>

Media, then, is increasingly recognised by the UK's strategic rivals as a route through which it can influence and change global narratives in their favour. Where the UK is scaling back its international media presence, with extensive cuts to the BBC in recent years, its strategic rivals are ready to step in. A particularly striking example of this emerged after BBC Arabic was taken off the air in January 2023 and Russia's state-owned Sputnik News quickly took over the radio frequency it had operated on in Lebanon.<sup>123</sup> This is part of a wider trend too, with Western media at large facing cuts and defunding. United States President Donald Trump has stripped federal funding to the Voice of America and cut USAID, resulting in independent media outlets across the world losing funding. The reduced availability of Western, but crucially impartial, media offers our strategic rivals the opportunity to further increase their influence over the media landscape.<sup>124</sup> The UK should think carefully about how it can help to plug the gaps left by the United States, to both minimise the potential for strategic rivals to step in, and to seize the opportunity to strengthen its own influence and reputation during this difficult time.

## Science and Technology

The UK also finds itself in particularly sharp competition in the science and technology sphere and its reputation in this field is at risk. Among young people in the G20, the UK is outperformed by the United States, Japan, China and Germany in being perceived as at the cutting edge of science and technology.<sup>125</sup> This perception reflects the reality too. According to the *Nature Index*, China leads the world in the physical sciences, chemistry and earth and environmental sciences and it now produces more patents than any other country in the world. China's scientific dominance is also expected to continue to grow. In 2024, China increased its funding for research and development by another 10% and it is offering big incentives to top overseas talent to work in labs in China.<sup>126</sup> The UK cannot compete with this level of investment and has already found itself falling behind China in areas of science in which the UK has traditionally excelled, such as life sciences and clean energy.

China, under the banner of the Health Silk Road, has also sought to gain influence abroad through targeted donations of vaccines, medical equipment, and medical personnel, particularly during the Covid-19 crisis, sometimes tying donations directly to political demands. As China's technological and scientific prowess grows, it stakes a claim for itself as a global scientific leader, with all the economic and strategic benefits that brings, and at the potential expense of the UK.<sup>127</sup>



Meanwhile, recent developments in the space sector pose a challenge to the UK's growing interests and to collective engagement in the sphere. While collaboration between Russia and the West tentatively continues around the International Space Station, Russia hopes to have the core of its own space station by 2030 and continues to strengthen its collaboration with China.<sup>128</sup> In March 2024, Russia's State Space Corporation, Roscosmos, announced plans for Russia and China to build an automated nuclear power plant on the Moon. While this is not the first joint Sino-Russian venture within the space frontier – indeed, the plant's stated purpose is to power the International Lunar Research Station (ILRS) that Russia and China introduced in 2021 – it highlights how lines are increasingly being drawn between Western space actors and their collaborating strategic rivals.<sup>129</sup> For the UK, which has long yielded soft power benefits from its leadership in science – both in terms of international reputation and trade – this growing collaboration poses a challenge to its soft power.

### **Multilateralism**

Another arena in which the UK has traditionally benefited from soft power has been in multilateral institutions. Having helped establish many of these institutions and possessing both expertise and strong commitment to international law and human rights, the UK has long benefitted from a strong position within multilateral institutions.

However, the multilateral world order is changing. Growing nationalism, institutional inertia and failure to address the issues faced particularly by the Global South are contributing to growing disillusionment with the multilateral system. The multilateral system has been further challenged by the decision by United States President Donald Trump to withdraw from the World Health Organisation and the Paris Climate Agreement. The retreat of the biggest contributor to the multilateral world order, both financially and politically, poses a substantial risk to the future of the multilateral system upon which the UK has built a strong reputation.

This challenge is compounded by China's efforts to scale up its contribution to, and influence in, multilateral institutions. It is now the second largest contributor to the UN peacekeeping budget, where it is now seeking to secure senior political and military peacekeeping leadership posts in the UN Department of Peace Operations (UNDPO).<sup>130</sup> China's involvement in the ISO and IEC has also expanded significantly in recent years. For example, its participation in ISO technical committees has grown by 65% in the past 20 years, which means it now participates in more committees than any other country, just ahead of Germany and the UK.<sup>131</sup> It is also a major contributor to the UN's regular budget, UN peacekeeping, and other development-focused entities and has begun to utilise the position it now occupies in these multilateral institutions to pursue its own ends. For example, China has flexed its diplomatic muscle to block Taiwan's participation at the International Civil Aviation Organisation and the World Health Organisation (WHO).<sup>132</sup>

At the same time, China is also seeking to position itself as a champion of the Global South and is pushing for a major overhaul of global norms, laws and institutions. China's



2023 'Proposal of the People's Republic of China on the Reform and Development of Global Governance' includes plans for sweeping global reforms, and pitches China - through its Belt and Road Initiative, Global Development Initiative, Global Security Initiative and Global Civilisation Initiative - as providing a comprehensive alternative to the current global order. Meanwhile, at the 2024 G20 Summit, China announced a raft of new development and investment commitments, as well as proposals to reform the global order to better support the Global South.<sup>133</sup> While there are legitimate reforms needed in global institutions, not least to better represent the Global South, the primary beneficiary of China's attempts to rework the multilateral world order will be China itself, and the UK's ability to promote international law and human rights, which are fundamental UK values and crucial to national security, will be curtailed by such efforts by China.

### **The Soft Power of the UK's Allies**

Competition in the soft power sphere comes not just from the UK's strategic rivals, but also from the UK's allies and other state and non-state players. Indeed, the United States topped Brand Finance's Global Soft Power Index in 2025, while Italy has now overtaken the UK as the most attractive G20 nation to 18 to 34-year-olds in the G20, with seven of the UK's traditional allies also receiving an over 70% approval rating.<sup>134</sup> To some degree this should be celebrated, as a clear strength in the position of the UK's allies which reflects back on to the UK. However, it also threatens the UK's comparative advantage in key areas, and the UK cannot necessarily always rely on its friends or their soft power to support it.

The re-election of President Trump in the United States, and the pronouncements that have followed, including the suspension of USAID, withdrawal from key multilateral agreements, and wide-ranging tariffs, for example, will significantly impact the reputation of not only the United States but also its allies, including the UK. It will also fundamentally challenge the status quo in many of the areas - from international development to science to multilateralism - where the UK has traditionally exerted soft power influence, likely shifting the balance of power towards the UK's strategic rivals.

### **Levels of Investment**

While there is no standardised metric for soft power spending and comparable data is hard to come by, research by the British Council shows that the UK is a "middle-ranking country in terms of the level of state support for soft power", spending considerably less on soft power than key allies in Europe, including Germany, France, Spain and Portugal.<sup>135</sup> While the UK benefits from a depth of soft power, these soft power assets cannot be expected to retain their comparative advantage in the long-term, when they receive significantly less investment and support than their competitors.

This is particularly the case where the UK's allies are scaling up investment in areas that have traditionally been major sources of UK soft power. While the UK's higher education institutions find themselves in an increasingly challenging financial position, European partners are increasing their investment in higher education, seeing it as an

opportunity for economic growth and to secure international influence. UK allies are also outcompeting the UK in their investment in nations seen as critical to the UK's future security and prosperity. France has, for example, cornered significant parts of the cultural market in Saudi Arabia and India.<sup>136</sup>

The UK's allies are also highly strategic in how they invest their spending. South Korea is currently riding the Korean Wave (Hallyu), which has seen its pop culture, TV and music, surge in popularity in recent years. To maximise the opportunity this presents, South Korea is investing heavily in its arts and culture, investing £1.3 billion in 2025 into the Korean wave.<sup>137</sup> The UK could learn from its allies in scaling up investment at opportune times - be it major sporting, media or cultural events - to reap maximum economic, soft power and geostrategic benefits.

Although investment by allies in soft power should be welcomed as a clear benefit to the standing of the West at a time of increased polarisation, it is also clear that the UK's own comparative advantage is at risk. Continued investment in and support for the UK's soft power is therefore essential for keeping up with our allies and maintaining the UK's soft power capabilities.

### **Alternative Forms of Soft Power**

The UK's allies are effective at leveraging a wide range of soft power assets, some of which the UK has yet to fully utilise. The clearest example of this is diaspora engagement. The UK currently has a very limited understanding of its diaspora and its composition, let alone a strategy on how to engage effectively with it.<sup>138</sup> However, a number of the UK's allies have successfully leveraged their diasporas as an effective soft power tool. Ireland describes its diaspora as "one of its greatest resources" and runs a wide range of initiatives such as giving Presidential Distinguished Service Awards for exceptional members of the Irish diaspora, providing the diaspora with access to Irish language opportunities and promoting study abroad programmes for the Irish diaspora to study in Ireland. Meanwhile, Finland holds an expatriate parliament, while South Korea has a website (korea.net) which provides information about Korean culture, language, and society to its diaspora.<sup>139</sup> All these initiatives serve to strengthen diaspora engagement and can be a powerful soft power asset, securing global champions for their respective nations.

Sports diplomacy is another area in which the UK has yet to fully realise its soft power in the manner its allies have. For example, Australia has published national diplomatic sports strategies since 2015, in an effort to harness the potential tourism, trade and soft power benefits that could be derived and from its sporting activities. Furthermore, last year, Australia launched a Sports Diplomacy Consultative Group, composed of leading Australian sports organisations, to discuss the strategic and economic opportunities in international sport and to consider how the Government and the sporting sector can work together on shared priorities, including in addressing global challenges. This kind of strategic thinking has helped deliver better alignment between the Australian Government and soft power assets, and has enabled the sports sector to understand where they are best placed to support national interests.<sup>140</sup>

Meanwhile, France's Ministry for Europe and Foreign Affairs (MEAE) uses sport to enhance its international offer through a wide range of means, including hosting major sporting events, supporting French candidacies in sporting bodies, sports aid, hosting conferences, forging mutual bilateral relationships through sport, and the use of sports ambassadors. France has also used French sports expertise to strengthen its international offer, including through deploying international technical experts (ITE) in sport to Africa.<sup>141</sup>

Science diplomacy is another area where the UK's allies are thinking more strategically than the UK. Japan, for example, has made science diplomacy a key part of its diplomatic focus since the 1980s, and this was reinvigorated when it launched its Society 5.0 project in 2016, which seeks to leverage technology to reinvigorate Japan's economy, society and governance, including as part of its international offer. For example, Japan and Japanese companies have supported the development of key infrastructure projects in India, including metro systems and bullet trains, in pursuit of its 'Free and Open Indo-Pacific' initiative, which looks to bring peace and prosperity to the region.<sup>142</sup> Similarly, the United States leverages NASA as a key soft power asset. Its independence from the Pentagon allows it to strike partnerships with a diversity of nations, and deals around data-sharing with Saudi Arabia and a satellite agreement with Brazil have the powerful potential to strengthen relations with nations who may otherwise be pulled into China's orbit.<sup>143</sup>

### **Embedding Soft Power into Foreign Policy**

The UK's allies are also more effective, and more strategic, than the UK when it comes to embedding soft power within their foreign policy planning.

Germany, for example, has integrated cultural relations into the third pillar of its foreign policy agenda since the 1970s, and, even through the flux of entering the *zeitenwende* of German foreign and defence policy since Russia's invasion of Ukraine, soft power has remained central to Germany's foreign policy.<sup>144</sup> As a result of embedding cultural relations into its foreign policy, Germany has been consistent and strategic in its use of culture as a form of soft power. In 2020, for example, the Federal Government used its Foreign Cultural and Educational Policy to strengthen international cooperation and cultural exchange at the civil society level with Russia and Eastern Partnership countries, during politically contentious times. €20 million was budgeted for 170 projects to strengthen relations, including cooperation between German and Polish projects for the first time.<sup>145</sup> The use of foreign cultural policy in forming bonds with civil society actors and in the promotion of core values of the German Federal Republic has been very successful in improving and managing Germany's international reputation.<sup>146</sup> The key institutional mechanisms are all there: competent and consistent leadership, strategic and long-term planning, coordination of strategy development at a Federal level which then consults civil society organisations and sub-national structures, and a range of specialist delivery agencies.

Further afield, Malaysia has denoted cultural diplomacy as one of its top foreign policy priorities in its post-pandemic international strategy, focusing on the power of culture

to advance international cooperation, as well as investment and trade, and developing specific implementation approaches to do so. So far, this has included renewed emphasis on hosting cultural festivals, attracting tourists, offering virtual tours and exhibitions and a Student Tourism Program Club.<sup>147</sup> Other nations' integration of soft power into the highest level of Government policymaking is enabling them to effectively strategise, cultivate and utilise their soft power resources at every foreign policy turn. There is much, therefore, for the UK to learn from its allies to embed soft power at the core of the UK's wider international strategies and agendas and to ensure the sustainable maintenance of its current soft power advantages in the face of growing competition.

### **Competition or Collaboration?**

While many of the UK's allies continue to invest more than the UK in their soft power, they are also making cuts to areas of their soft power. Economic challenges in Europe particularly have seen soft power deprioritised. France cut its culture budget by €204 billion in 2024, and Germany's Goethe Institut has been forced into a major restructure to free up short-term cash. Meanwhile, the Netherlands has announced plans to increase VAT on culture, books and sports from 9% to 21% from the start of 2026, a move expected to cost the sector €200 to €350 million a year.<sup>148</sup>

Most concerningly, the United States has cut US foreign aid and is stepping back from leadership of the multilateral world order, with significant ramifications for its soft power globally. With Europe preoccupied with the crisis in Ukraine, the decline of American soft power will create a vacuum that the UK's strategic rivals will likely seek to fill. This will further undermine not only UK soft power but UK security and prosperity as well.

As such, while the UK should seek to avoid losing ground to our allies when it comes to soft power, it must also look for opportunities to work in partnership with friends and allies, to protect and promote our collective soft power at a time when that is increasingly under threat.

### **The Domestic Environment**

In a globalised world, foreign and domestic policy are heavily intertwined, and the UK's domestic environment, therefore, has a significant impact on the UK's soft power. From Britain's withdrawal from the EU, to the Covid-19 pandemic, the energy crisis and subsequent cost-of-living crisis, the domestic environment has been particularly challenging for the soft power sector over the last few years.

### **Withdrawal from the EU**

Five years on from the UK's departure from the EU, a number of challenges remain. Barriers to trade, difficulties securing visas and work permits, and increased administrative burdens have all increased costs for organisations enacting soft power, impacted business opportunities and limited their influence and reach across the European continent.

For example, the current arrangements for how long Britons can spend working in EU countries have led to a significant decline in the number of British creatives taking up collaboration projects and residences in Europe. Indeed, a study by the Independent Society of Musicians found that 47.4% of musicians have had fewer working opportunities in the EU since January 2021, and 39% have had to turn down opportunities due to visa and other administrative costs.<sup>149</sup> Meanwhile, the increase in EU student tuition fees which emerged when the UK left the EU has caused a large drop in the number of EU students at UK universities, while the delay in association to Horizon Europe led to negative perceptions of the trustworthiness of UK partners, and the loss of UK institutions as project and consortium leaders. Similarly, challenges around the loss of mutual recognition of qualifications between the UK and the EU are impacting potential new opportunities for UK firms or professionals to be the leading providers of key services outside the UK.<sup>150</sup>

A particular challenge has been the loss of EU funding which has not been fully replaced. Cultural projects no longer receive funds from Creative Europe, which, between 2014 and 2020, provided €68 million in direct support to UK projects. Meanwhile, the UK's departure from Erasmus+ has meant the UK has not only forgone the scheme's core funding, but an estimated £243 million per year bonus to the British economy, generated by European students.<sup>151</sup> New UK funds have plugged some of the gaps, from the Turing Scheme and the Global Screen fund, to the UK Shared Prosperity Fund (UKSPF) and, most recently, the Government's announcement of a £60 million funding boost for creative industries. Nevertheless, the reduction in financial support and routes for exchange and collaboration with Europe has significantly impacted UK soft power institutions in recent years.<sup>152</sup> The Turing Scheme, for example, only allows for UK students to travel overseas and does not provide support for international students to come to the UK, limiting the UK's powerful potential alumni network. Gaps therefore remain.

The UK's departure from the EU has also presented a wider challenge than just the practical issues around resources. It has thrown up crucial questions about what the UK stands for and what its role in the world is. Leaving the EU thrust the UK into the international spotlight and key moments during the recalibrating of the UK-EU relationship, from the proroguing of parliament to threats to break international law over the Northern Ireland backstop, served to undermine the UK's reputation in important areas of its soft power, not least its perceived commitment to international law.<sup>153</sup> The last Government made an effort to present a new vision for the UK, under the mantra 'Global Britain' but with a new Government now in place, the UK is still defining what its new narrative will be. Finding a compelling narrative is crucial to projecting a coherent and unified image for the UK on the world stage, which UK soft power assets can play a crucial role in supporting.

### **Growing Costs and Reduced Income**

Many UK soft power assets find themselves in very difficult financial positions. The surge in living and business costs that barrelled across Europe in the wake of Russia's invasion of Ukraine, triggered by rising energy prices and supply chain issues, drove

up operational costs, and has further exacerbated the difficult economic position many soft power assets found themselves in post-pandemic.<sup>154</sup> Combined with rising business costs emerging from recent national insurance and national living wage increases, it is becoming increasingly difficult for many soft power organisations to maintain their operations and services. Since 2000, 525 museums in the UK have closed, while in 2023 alone 125 live music venues closed. Indeed, without significant capital investment in the next five years, nearly 40% of theatres risk closure and 40% will become too unsafe to use.<sup>155</sup> On top of operational costs, a decline in disposable incomes among the UK public has impacted visitor and consumer confidence, with many spending indicators remaining well below pre-pandemic levels.<sup>156</sup> Without increased funding many others will follow suit, especially if the global tariff wars continue to escalate.

Underlying these challenges is the fact much of the sector is still recovering from the Covid-19 pandemic. The pandemic hit the soft power ecosystem particularly hard, with lockdowns and travel restrictions leading to a 60% decline in output in culture and the arts in the first 18 months, forcing organisations to eat into their reserves and take out loans, from which it will take a long time to recover. Meanwhile, overseas visitor levels are yet to return to pre-pandemic levels, with visitor numbers and revenue therefore remaining down for many soft power assets.<sup>157</sup> As the scars of the pandemic combine with the cost-of-living crisis and rising business costs, the soft power sector has been left financially vulnerable. Support is needed to help the sector to rebuild, and strategic thinking is required around the sector's longer-term resilience and financial sustainability.

### **Government Investment**

This precarious economic position is compounded by a multitude of challenges around Government investment, which impact the UK's ability to achieve its soft power goals and the value for money of doing so. The first challenge surrounds the amount of Government investment available. The UK's difficult fiscal situation has led successive Governments to make cuts to the UK's soft power sector. Between 2009 and 2023, DCMS' core funding of cultural organisations decreased by 18%. As their budgets are squeezed too, cuts are also being made at the devolved and local level. In the same period, local government revenue funding for culture and related services plummeted by 48% in England, 40% in Wales and 29% in Scotland.<sup>158</sup>

Similarly, consistent cuts to the British Council have restricted its traditional work on educational development and cultural relations. Between 2023 and 2024, the British Council's support from grant-in-aid funding decreased by £12 million, and the financial burden of a £197 million pandemic loan, combined with exposure to foreign exchange volatility and global inflation, have placed the organisation in a fragile financial position. Further cuts of up to £250 million, including potential closure in 40 countries, may be necessary without increased Government support. The British Council network has already had to be pared back, with the number of global British Council offices cut from 196 in 2013 to 152 in 2023.<sup>159</sup>



This is despite the British Council offering excellent value for money. For a small £162 million grant-in-aid investment, the UK secures £1 billion of British soft power activity globally. Not only is the British Council a soft power asset in itself, promoting British language and culture, but it is also central to supporting the success of other soft power institutions as well. For example, the University of Reading has highlighted the role of the British Council in helping universities win students internationally, and in establishing its Malaysia campus. Cuts to the British Council will therefore have significant implications on the UK's wider soft power too.<sup>160</sup>

Meanwhile, despite receiving a funding boost in the Autumn budget, financial pressures and the two-year freeze in the licence fee means the BBC World Service is still facing a major deficit and, in its efforts to save around £6 million over the next financial year, the body has cut 130 jobs. These have included key multilingual regional experts who added authority, breadth and local expertise to news and current affairs programmes. In an increasingly contested media environment, these cuts will impact the quality, reach and quantity of its broadcasts.<sup>161</sup>

The challenge is not just levels of Government funding but also the lack of long-term planning and certainty around budgets. This is particularly challenging in the context of one-year Comprehensive Spending Review roll-overs which limit organisations' ability to plan more than a year ahead. As the BBC World Service has highlighted, its year-by-year variable budget makes it difficult to predict budgets and therefore makes it harder to invest both in long-term growth, and where needed, to invest in bigger changes and efficiencies.<sup>162</sup> Furthermore, big, soft-power-producing projects can first require three or four years of nurturing the critical relationships and building the necessary infrastructure, meaning that without multi-year funding, authentic soft-power projects are therefore often unfeasible.

This challenge is compounded by the Government's preference for providing state support via project-based funding, and competitive bidding for relatively small sums, rather than offering longer-term grant-in-aid. These processes increase administrative burdens, make it challenging to cover core costs and bring significant uncertainty to organisations. In these processes there is also a recurrent issue of extensive delays in securing funding, due to the lengthy post-submission decision process, which can mean that projects have to be scaled back with a commensurate reduction in grant and then delivered at speed to fit within the financial year.

It is therefore crucial that more effective and sustainable funding models are found to support the taxpayer-funded elements of soft power. In particular, grant-in-aid funding should be prioritised over smaller short-term initiatives like seed-funding pots, to ensure that institutions are able to function at the best of their ability and are able to use their internal expertise to direct funds to the areas where they can make the most impact.



## **The Rise of Technology**

As cutting-edge technologies become ever more critical in global competition, the UK's national interest, development and security is reliant on, among other things, its ability to remain at the forefront of new technologies. This, however, places great pressure on the UK's soft power assets. With emerging technologies predicted to revolutionise virtually every sector, and intense international competition expected for talent and investment, as well as computing power and materials, organisations who enact soft power must be ready to adapt, invest, and be appropriately skilled to navigate this new environment.

Not only is accelerated technological innovation leading to a significant shortage of skilled professionals, but the rapidly evolving landscape requires constant complex updates to regulations and policies, increasing the cost of doing business in the UK, due to increased operational expenses and regulatory compliance costs. On top of this, failure to lead from the front on technological innovation risks 'brain drain', as the UK's pool of skilled professionals leave for more appealing opportunities abroad, further hindering the UK's ability to innovate and compete globally.<sup>163</sup> These challenges require a concerted effort from the Government, private sector, and educational institutions to foster innovation, invest in research and development, and create an environment conducive to technological growth.

While this is a challenge most acutely felt by organisations in the science and technology space, it is a challenge across the wider soft power sector as well. The success of the UK sport's teams, the appeal of its theatre and arts, and the effective delivery of English language learning are all dependent on the successful adoption of science and technology. Failure to keep pace will leave the UK vulnerable.

At the same time, there is a positive story to tell here. The UK has long been a leader in science and innovation. The 'Golden Triangle' of Oxford, Cambridge, and London is a highly dynamic innovation ecosystem, the UK remains a world leader in research and development, and the Government is already leading on the opportunities and challenges around AI through its AI Opportunities Action Plan. Successfully leveraged, these existing strengths provide opportunities for the UK to lead in the science and technology revolution happening across the world, including in the soft power sphere. In doing so, the UK can help to future proof its soft power and carve out a clear national narrative for itself as a nation at the cutting edge of science and innovation. However, UK soft power assets will need support to overcome this challenge and to be able to instead seize it as an opportunity to strengthen the UK's economic and soft power position in the world.

## **Domestic Disengagement from International Activities**

A significant challenge confronting many of the UK's soft power assets is a disengagement among much of the British public towards the UK's international activities. While the majority of Britons are interested in the UK's international engagement, they are relatively indifferent to international spending in general

terms and widely opposed to international development spending. Their approach to international spending is best characterised as zero-sum, with a clear desire to prioritise domestic spending and addressing domestic challenges over international activities.<sup>164</sup>

This lack of public engagement with international activities creates a multitude of challenges. In the first instance, it limits support and engagement with actors' work on overseas initiatives, and this inward-focused trend impacts income and revenue generation for organisations enacting UK soft power. It results in fewer individuals participating in cultural exchange programmes, educational initiatives, and other soft power activities, or seeking to expand their international horizons. For example, British Council research has found international engagement in UK schools is in decline, as well as engagement with modern foreign languages.<sup>165</sup> Further effort must be made to expand the UK's education system to include engagement around other cultures and histories, in a long-term effort to encourage greater understanding and appreciation of other cultures.

Lack of public engagement also impacts politicians' willingness to prioritise and invest in international activities, not least because MPs tend to view local constituency issues as their first priority, with bigger, international challenges coming second to this, even where the latter has significant implications for the former. This ultimately limits Government engagement and funding for the UK's international activities, even as they serve domestic interests.

Not to be overlooked is a more disquieting trend among younger Britons, of viewing the UK less positively compared to our international partners' perceptions. The British Council's Global Perceptions surveys have highlighted that while the UK is generally seen very positively by young people overseas, British young people themselves are more critical of their nation's own global image.<sup>166</sup> This narrative runs the risk of further disengaging British youth from international engagement altogether, compounding this issue.

Moreover, isolationist attitudes can hinder the fostering of positive relations and mutual understanding with other nations and be perceived as a lack of interest in or respect for other cultures. As such, a perceived lack of international engagement can affect the UK's brand and reputation. A national identity that embraces global connectivity and cultural exchange has traditionally been a cornerstone of the UK's image, and if isolationist attitudes are seen to dominate public discourse, it can create a negative perception among international audiences, leading to a potential decline in the UK's attractiveness as a partner for cultural, educational, and economic collaborations.

This is reflected too in the growing polarisation around migration and the rising anti-immigration and far-right sentiment that propels it. The trending opposition to migration is having a profound impact on UK soft power assets - from universities and research institutes, to cultural and arts bodies.<sup>167</sup> Government efforts to appease public concerns and cut migration numbers have led to the tightening of visa regulations, and the restriction of international student numbers, which work to reduce the diversity and

global reach of many of these institutions, which thrive on the exchange of ideas and collaboration with international counterparts. Public hostility to migrants travels fast and also serves to dissuade and deter talented and skilled workers from travelling to the UK, and instead into our competitor's arms. This growing sentiment evidences a narrowing of perspectives among Britons, and the overall effect is a weakening of the UK's ability to project its cultural and intellectual influence on the global stage, ultimately diminishing its soft power.

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# Government Engagement on UK Soft Power

In January 2025, the UK Government announced a new Soft Power Council. The Council will bring together individuals from organisations enacting soft power and experts to champion a new, hard-nosed approach to soft power. The creation of the Council is a very welcome development. Indeed, it reflects one of the key recommendations of the first iteration of this report, which highlighted the need for a ‘new Government-soft power engagement forum to aid connectivity and strategic thinking between Whitehall, devolved administrations and independent organisations who enact soft power’.<sup>168</sup> The UKSPG welcomes the opportunities this new Council brings and is on hand to support the Government and the Council in its work.

We look forward to seeing the initiatives of the Council bearing fruit. Nevertheless, several priorities remain in ensuring coordination and cooperation in the soft power space, both within Government and between Government and the wider soft power ecosystem. This chapter of the report therefore seeks to highlight current challenges and identify potential solutions to strengthen coordination between the Government and the soft power ecosystem.

## Strategic Thinking and Shared Vision Around Soft Power

In recent years, and particularly after leaving the EU, the UK has struggled to articulate and stick with a clear vision for its role in the world. In turn, it has been difficult to discern a clear ambition for UK soft power and decisions made by different parts of Government have served to undermine UK soft power. The recent decision to cut the Overseas Development Assistance (ODA) budget, for example, while understandable, will have ramifications for the UK’s soft power and global influence. Indeed, it demonstrates why it is essential that there is a clear and coherent strategy for soft power, as well as a shared understanding of how any given action in one area might in turn impact UK soft power.

As a result of the lack of joined-up thinking around soft power, engagement with UK soft power assets has tended to be ad-hoc, focused on individual opportunities and moments, rather than coordinated towards a clear vision or strategy. Nevertheless, there are examples of where soft power assets have been effectively engaged in strategic Government thinking. The Sports Diplomacy Group, for example, co-led by the FCDO and DCMS, has been a positive first step in coordinating the strategic deployment of sporting assets in support of foreign policy goals. The Group acts as a potential model for similar working groups across different sectors, which could align thematic initiatives with diplomatic priorities to ensure a coherent approach across Government and independent actors.

Indeed, in the world of sport there have been many successful examples of effective join-up. For example, UK Sport has been engaged in several Memoranda of Understanding with other nations. MOUs are milestone opportunities to strengthen

bilateral relations, and the strategic engagement of UK Sport in these initiatives has had clear benefits, such as in the lead up to the Tokyo 2020 Olympic and Paralympic Games where UK Sport's involvement in an MOU enabled knowledge transfer opportunities and exchanges between the nations' sporting organisations. UK Sport also regularly works with the Department for Business and Trade (DBT), to support strategic thinking around and host, international delegations in order to provide high-performance sport knowledge transfer, highlight the expertise of the UK in the sector, and improve its own global reputation for open cooperation and expertise.<sup>169</sup>

Similarly, the now-discontinued Culture Diary, which operated as an intermediary platform between the culture sector and the Government, helped provide clear and visual delineation of upcoming projects, priorities and mutually beneficial opportunities from both Government and the cultural sector. In doing so, the Culture Diary acted to improve communication lines, catalyse partnerships at home and abroad, spearhead cultural diplomacy opportunities and drive trade and investment. At its peak, it was able to support nearly 4,500 cultural events planned in the capital during the London 2012 Olympic Games. While the process of updating the diary could often be quite onerous and its potential was not always fully leveraged, particularly by overseas posts, there is potential for similar initiatives to provide clear and valuable direction and to help identify opportunities for collaboration between Whitehall and the soft power sector.

However, these examples are not the norm. Government engagement with soft power assets has tended to be an afterthought rather than longer-term and strategic. The UKSPG for example has been brought in to support the development of a number of reviews and events, such as the 2023 International Development Strategy or ahead of COP26. While the sector appreciates Government efforts to collaborate with soft power institutions around key domestic and international moments, the last-minute nature of the asks and the lack of mechanisms within Government to consistently harness their collective contribution often limit their effectiveness.

Partnerships between Government and the soft power sector are also often short-term and transactional and can therefore fail to properly maximise potential longer-term benefits. For example, UK Sport's collaboration with the Department of International Trade (now DBT) for the 2022 Commonwealth Games was an excellent and successful short-term partnership but a representative noted that the project lacked the long-term strategic thinking and goals that are critical to unlocking the full potential of economic opportunities and international linkages that can be derived from major events.<sup>170</sup>

While some soft power cooperation will inevitably be last minute, there are areas which lend themselves particularly well to long-term planning. Horse racing is a hugely lucrative soft power sphere, with world-famous sporting events including Royal Ascot, the Derby, the Cheltenham Festival and more, attracting a huge number of tourists, global investors, foreign diplomats and policymakers alike, and projecting an image of international excellence for the UK. British racing's calendar of fixtures, not subject to multi-event bidding cycles or set to change annually like in most other sports, is perfectly placed to attract long-term strategic planning, particularly around diplomatic

networking and trade outcomes, but, at present, these events do not get utilised to their full potential. This latency is increasingly being noted by international investors, who are concerned about the UK's perceived lack of interest in the racing industry.<sup>171</sup>

The plans for the new Soft Power Council to develop both a soft power strategy and a calendar for soft power and diplomatic events are therefore very welcome. The development of a new soft power strategy presents an opportunity to work alongside key stakeholders from across Whitehall, as well as actors outside it who enact soft power, to co-create a strategy that fully assesses and meets the needs of the Government and the sector alike.

This strategy should create a shared vision of what the UK's soft power is, what the UK wants to be in the world, and how UK soft power assets can be utilised towards this vision. Crucially, it must be honest and transparent about the UK's use of soft power, embedding principles of reciprocity with a focus on the mutual gain that can be derived from the strong partnerships that soft power helps build. It should also identify key priorities that the sector and Whitehall can collectively work towards and the achievement of which can serve as a measure of the success of the Council and the UK's soft power ambitions more generally.

It is also essential that this strategy is properly funded, with adequate resources made available in Whitehall and to independent soft power assets to make these priorities a reality. This should include a permanent team of civil servants in Whitehall to lead this work, as well as funding for both Whitehall and the soft power sector, for projects that align closely with the Government's soft power strategy. Sufficient transparency around the terms of reference for the Council, and how the wider sector can feed into strategy discussions and any other formal outputs, will be crucial in ensuring effective representation and buy-in.

### **Mechanisms and Culture of Collaboration**

Prior to establishing the Soft Power Council, there was no overarching group or body within Government organising and leading on the UK's soft power. Instead, organisations looking to engage in soft power were reliant upon building and leveraging their individual relationships with Government to deliver soft power ambitions, often on a very ad-hoc basis.

There are examples of this working well and some institutions, particularly bigger organisations, have managed to successfully navigate this landscape. The British Council, for example, has wide-ranging relationships across Government, from supporting the Department for Education (DfE) and DBT on the delivery of the UK's International Education Strategy, to breaking down barriers to growth in the creative industries with DCMS, and working with the Department for Science, Innovation and Technology (DSIT) to provide seed funding for capacity-building in research. Fellow ALB, Wilton Park, also regularly collaborates with partners from across Government departments to deliver policy dialogues, including the FCDO, DBT, the Department for Environment, Food and



Rural Affairs, the Ministry of Defence (MoD) and DfE - often acting as a space to improve coordination across Whitehall.<sup>172</sup>

Meanwhile, ACCA, has worked closely with TheCityUK and the FCDO to support the economic development and rebuilding of Ukraine's economy through the provision of training, strengthening public financial management, and supporting the Ukrainian Government's EU accession journey through the adoption of EU sustainability disclosures legislation.<sup>173</sup> Another example of effective collaboration has been the Global Research on Antimicrobial Resistance study (GRAM-2) co-funded by the Wellcome Trust and the UK Government's Department of Health and Social Care. The findings of the study were utilised to underline the urgency of this challenge ahead of a high-level meeting on antimicrobial resistance at the UN General Assembly, resulting in 9000 pieces of media coverage and the passing of a UN declaration with an agreed set of targets.<sup>174</sup>

These examples serve as powerful reminders of how effective collaboration between the UK's soft power sector and Government can be in achieving our international objectives. However, for organisations without any formal ALB status, or sponsoring link to a government department - particularly those that do not necessarily have grand notability or significant resources - building meaningful relationships across Whitehall can be difficult. Moreover, collaborative engagements between the Government and independent actors tend to be relatively ad-hoc. They are reliant on the enthusiasm and energy of individuals in Whitehall and individual organisations, rather than being embedded in clear systems and processes to support collaboration.

The new Soft Power Council is therefore an important innovation which will hopefully provide opportunities to strengthen collaboration between the sector and Whitehall. However, it will only meet a few times a year and it is not enough on its own to provide the day-to-day engagement and support that the soft power sector needs. Additional mechanisms of collaboration are therefore required.

The creation of additional day-to-day mechanisms for soft power collaboration would enable more regular and tailored support to the sector to allow it to thrive. For example, while one of the benefits of soft power assets is that they can cooperate with nations that the UK Government may struggle to engage with directly, there are risks involved. Representatives from across the soft power sector, such as those in the British racing sector have outlined how racing - like several other sports - often receives criticism for engaging with and supporting events held in countries such as Saudi Arabia.<sup>175</sup> If the Government wishes to leverage soft power in support of these kinds of activities, it must also provide appropriate mechanisms of support and collaboration to enable these organisations to navigate the complexities of international engagement confidently, while minimising the risk to the organisation and to UK soft power more broadly.

There have been examples of the Government successfully supporting organisations in this way. The decision by DCMS to host a roundtable for ALBs on entering and negotiating partnership agreements with Saudi Arabia, for example, was welcome. The

roundtable considered the best common wording, messaging, and templates that actors could use to ensure that the UK is presenting a united front when engaging with less familiar nations, and to help secure greater confidence in negotiations. More initiatives like this would be well received.<sup>176</sup>

Furthermore, while the Council captures a vast range of the UK's soft power, there are inevitably areas such as science and technology, governance and standards, media and performing arts, which are relatively underweighted. More broadly too, there is a depth of soft power expertise in the UK which extends far beyond the Council, from which the Government would benefit from successfully leveraging. As such, even while the Council itself is relatively large, there is still a need to communicate and interact with the wider sector as well, and to reach outside of London. By developing additional mechanisms by which the wider sector can feed into the Council and the Government's wider soft power thinking, there are extensive opportunities to further strengthen the UK's soft power.

The development of these mechanisms for collaboration must also be accompanied by developing a stronger culture of collaboration. The UK Soft Power Group is keen to help cultivate an environment where different departments and agencies work synergistically alongside the soft power sector, sharing knowledge, expertise, and resources. We would hope to see a scenario in future in which civil servants are empowered to build relationships with the wider soft power ecosystem, support the development of more integrated and coherent policy and strategy making and the creation of a shared vision of soft power which a broader range of actors can endorse.

### **Understanding of Government Objectives**

Foreign Secretary David Lammy has made clear that his foreign policy ambitions centre around 'progressive realism'. However, there is still a way to go to make clear what 'progressive realism' means in practice and how institutions outside of Government can support it.

The Foreign Secretary has launched three reviews into key areas of UK foreign policy - the UK's Global Impact, development and economic capability - as well as multiple other strategic planning initiatives, which will hopefully provide some clarity on what this vision means in practice. Soft power has a key role to play in each of these areas and we hope the importance of UK soft power is recognised in all three reviews. In order for the reviews to be as impactful as possible, they must also come together to present one clear vision and narrative for the UK's foreign policy. While the reviews are not being made public, we would recommend that as much detail as possible about the reviews' findings is shared widely to enable a wide range of actors, including those in the soft power sphere, to understand and mobilise in support of the Government's broad ambitions. This is particularly important for actors enacting soft power, given that for most of these organisations soft power is secondary to their primary purpose of delivering programmes, goods or services.

Within the soft power strategy and the three reviews it would also be beneficial to have clarity on where it would be most impactful for the soft power sector to strategically target its focus and influence, to maximise their contribution to the UK's position in the world. In this regard, it is essential that UK soft power shared priorities and initiatives run with the grain of existing corporate structures and processes, not across them, and are firmly aligned with the overarching structures and ambitions for UK foreign policy.

This place of soft power in the UK's wider foreign policy vision should include clarity on both regional and thematic priorities, as well as values, which the soft power sector can lead on. The identification of clear geographical priorities for soft power could prove particularly powerful, with British embassies, the British Council and independent institutions able to collectively mobilise their networks, knowledge and capabilities at post in pursuit of the UK's international ambitions.

### **Cross-Departmental Understanding and Engagement on Soft Power**

The diverse and cross-sectoral nature of the UK's soft power is, in many ways, one of its biggest strengths. Nevertheless, it also poses challenges, in particular in engaging with the Government. A Government department may have a consolidated understanding of the workings of individual soft power assets within their jurisdiction but they often lack knowledge about those placed outside. Consequently, soft power institutions are not notified of key opportunities due to a lack of awareness of their scope and/or ability to contribute. ACCA, for example, partakes in many successful capacity-building projects across the world, yet many civil servants are unaware of this, and consequently would fail to notify ACCA of partnership opportunities in Sub-Saharan Africa or Pakistan, for example, despite the association having developed strong ties in those regions.<sup>177</sup> Better understanding of soft power across Government departments would therefore be mutually beneficial. For ACCA, for example, it would increase the profile of its vast global network of accountancy bodies and staff connections. Simultaneously, it would also strengthen its value as a soft power asset for the UK and enable its more strategic leveraging by the Government during important soft-power-projecting events, such as international diplomatic visits, or in providing expert consultations on areas such as taxation and skills.<sup>178</sup>

Gaps in cross-departmental communication within Whitehall also pose resource challenges for soft power, as soft power institutions struggle to keep track of the variety of initiatives and funding pots available, which are often spread across Whitehall. The experience of independent actors is that departments are rarely up to date on funding opportunities in other departments, nor expected to pass them on to the soft power institutions within their jurisdictions. As highlighted by the Science Museum Group, this is a particular challenge for soft power organisations that have objectives and initiatives that straddle the jurisdictions of multiple Whitehall departments and agencies, meaning they often don't find out about bids before it is too late.<sup>179</sup> Addressing this and improving communication between departments would therefore ensure soft power organisations can make more effective use of available funds and opportunities and improve Government procurement processes by ensuring they can attract, and ultimately deliver, the best bids.

This is particularly important given the Soft Power Council is co-chaired by the FCDO and DCMS. While it is right that soft power has a clear home, soft power assets work across, and are profoundly impacted by, a very broad range of departments including the DBT, DfE, DSIT, the Home Office and many more besides.

For example, when it comes to higher education, a key soft power asset, this is seen to sit first and foremost in DfE but is also fundamentally impacted by decisions made in the Home Office, FCDO, DBT and other departments. On the issue of international students, for example, decisions over international student numbers and post-graduation barriers to migration such as visas, will have significant ramifications for the UK's soft power, given international students are powerful champions of the UK. To ensure that the full suite of UK soft power assets is properly utilised, it is therefore essential that there is some form of fully cross-Whitehall engagement on soft power and its key cross-cutting themes, as well as training for a wide range of civil servants on the UK's soft power strategy and its assets, to mobilise a whole-of-society approach to soft power.

Strengthening this engagement across Whitehall will require more than just practical mechanisms though and will also necessitate a shift in both culture and expectations around soft power. It will require clear and focused messaging that develops the expectation of collective responsibility for delivering on soft power across a broad range of departments in Whitehall. It will also require the development of a more collaborative environment across Government when it comes to soft power, with the proactive sharing of expertise and insight across Government and with the wider soft power sector, for mutual benefit.

Alongside strengthening cross-Whitehall understanding and engagement around soft power, it will also be important to strengthen soft power engagement within overseas Posts as well. The UK has a strong and vast diplomatic network, but their understanding of, and engagement with, soft power is often patchy. Similarly, organisations in the sector often have a poor understanding of the UK's network of overseas Posts and how best to engage with them, including key points of contact and what knowledge and support is available from in-country teams. Increasing mutual understanding and developing practical mechanisms for closer cooperation between independent actors and overseas Posts is essential for maximising collective impact in key countries and priority regions.

### **Collaborating with Decentralised Soft Power Initiatives**

Soft power initiatives led by devolved administrations, cities and city-regions have played a transformative role in generating soft power halo effects that benefit the whole of the UK. From cultivating international city-to-city partnership opportunities to funding local prosperity initiatives, decentralised administrations' soft power initiatives are critical in both bolstering global connections and perceptions about the UK and in driving the vitality of the UK's domestic soft power sector.

The UK's devolved administrations each hold their own official soft power strategies and frameworks. Wales' Action Plan, Scotland's International Framework, and Northern Ireland's international relations strategy each outline how their respective nations can raise their international profile in line with their unique attributes and assets. These are supplemented by various other soft-power-related frameworks and bodies. Scotland, for example, has developed Scottish Government Innovation and Investment Hubs, based across Europe, which promote trade and inward investment into Scotland on an international stage.<sup>180</sup>

Meanwhile, regional soft power initiatives can help develop strong bilateral relationships with foreign national and city governments, which can support UK-wide interests. For instance, Wales has launched 'Wales and Japan 2025', the fifth of a series of country-focused campaigns by the Welsh Government designed to strengthen bilateral cultural and economic ties.<sup>181</sup> They also foster the opportunity for regions and cities to establish themselves as leaders in their field, which in turn advances the whole of the UK's reputation for expertise. Belfast, for example, is rapidly becoming a world-leading cyber security hub, Wales has highly respected compound-semiconductors and creative industries, and Scotland is a leader in both the space and climate fields.<sup>182</sup> Moreover, city-led events like the Edinburgh Festival Fringe draw in a huge number of international tourists and make an enormous contribution to Edinburgh's, Scotland's and the UK's global reputation as a cultural, creative hub. Cities can also help build strong affiliations with the UK. For example, Korean fans have flocked to London to watch Son Heung-Min play for Tottenham, opening up a huge new market for the UK's sports sector.<sup>183</sup>

Meanwhile, direct city-to-city diplomacy, such as twinning arrangements, can raise cities' international profile while also expanding UK economic ties and international market share. City diplomacy can also be a tool by which to collaborate with cities overseas to influence multilateral policymaking. This is exemplified by the efforts of the G7 Urban7 network (U7) launched in 2021 by Core Cities UK. It is composed of city associations from across the G7 nations and aims to collectively support delivery of the G7 dialogue and policy commitments through contributing local interests and examples of innovative action. This diplomacy enables the UK to demonstrate its interest and examples of UK leadership in multilateral communiqués and policy.<sup>184</sup> There is an opportunity therefore for the UK to better harness ready-made networks, like the UNESCO Creative Cities Network, as a key foundation by which to collaborate and create global connections. By promoting the unique advantages and qualities devolved nations and cities hold, and through their focus on driving investment and talent into British regions, devolved soft power initiatives can both support the UK's domestic and economic position and reinforce the UK's soft power strengths nationally.

However, where decentralised policies and priorities diverge from those of central Government, it can also cause jurisdictional friction and undermine UK-wide messaging. While protecting and respecting the operational independence of decentralised administrations, closer collaboration between cities, regions and Whitehall on priority themes, messaging and clear and coherent strategies are essential for projecting a united UK soft power front.

Enhanced engagement and communication between the UK administrations would help generate complementary rather than competing soft power initiatives, with aligned messaging and objectives. For example, greater coordination around major international events would enable cities to build city-to-city links that could complement, rather than compete with, national diplomatic efforts. Meanwhile, extending Government support - from targeted financial resourcing to making available diplomatic networks to city and regional initiatives - could help cultivate more high performing and more internationally connected projects, which in turn are pivotal in showcasing British strengths, promoting British expertise abroad, and painting the nation as an open, outward looking power.

A strategic, whole-of-UK approach to soft power that nurtures and harnesses the wealth of resources across the UK will therefore ensure the enormous social and human capital of the UK is effectively coordinated and utilised to further the UK's broader soft power prowess and support the achievement of the UK's international objectives.



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# Conclusions and Recommendations

The UK soft power sector is rich and diverse, bringing clear and direct benefits for the UK internationally and strengthening the UK's position on the world stage. However, in the current international and domestic context, urgent consideration is needed as to how to magnify the impact of the UK's soft power resources to best compete and collaborate on the world stage, and to leverage soft power in support of the UK's prosperity, security and influence.

At its best, the UK Government's active engagement and leadership on soft power has been crucial in developing and sustaining a strategic framework for soft power. While the independence and freedom of organisations which enact soft power are key to their value to the UK, the Government has a key convening role, setting a strategic framework for collaboration and providing essential investment, guidance and robust support for the sector. With the launch of the new Soft Power Council and plans to develop a new soft power strategy, the aim should now be to develop a wider soft power ecosystem that is strategically close, operationally autonomous and highly collaborative in pursuit of the Government's international ambitions.

The UK Soft Power Group offers this report and its recommendations for discussion in order to support the development of the UK's long-term approach to soft power, building on achievements and commitments so far, while taking a fresh look at how to maximise potential soft power in challenging circumstances.

## Recommendations

- 1) Establish a formal Government engagement mechanism with the wider soft power sector, including the UK Soft Power Group, to run concurrently with the Soft Power Council. This should also include establishing a formal contact point in FCDO for the wider soft power ecosystem to connect with the Government.**

While the Soft Power Council brings a range of key stakeholders into the conversation around UK soft power, there is a wealth of knowledge, networks and expertise that lies beyond the Council which could be leveraged in support of its ambitions. Creating a formal Government engagement mechanism for the wider soft power sector to feed into Government decision-making would therefore help provide critical connectivity and the necessary feedback loop between the wider soft power ecosystem and the Government.

The mechanism could take a variety of forms, including regular open forums and workshops or a larger-scale annual event bringing together a wide array of UK soft power assets to provide feedback and help define government strategic thinking on soft power. Such a mechanism should engage a wide range of organisations which enact soft power, including many of those not represented on the Council, and run across the

full breadth of the Government to include departments such as the Home Office, DBT, DfE, MoD, the Department for Energy Security and Net Zero and others, as well as the FCDO and DCMS, to encourage deeper strategic and more collaborative thinking about how to strengthen UK soft power. Such a forum would not seek to duplicate the work of the Soft Power Council but rather to act as a sounding board for both Government and the Council, as well as act as an opportunity for the Government to communicate, and secure buy in for, its soft power ambitions with a wide range of actors, to maximise delivery upon these objectives.

Alongside this, we also recommend establishing an easily identifiable formal contact point in the FCDO, accessible to both those inside and outside of the Government, to connect the wider soft power ecosystem with relevant contacts across the Government. Given the challenges the wider soft power ecosystem continues to face in navigating Government, having a dedicated contact point is key for enabling them to support the Government's long-term ambitions. Having such a position would also help to provide the necessary oversight and monitoring for effective Government-soft power relations, which is notoriously difficult.

### **2) Provide clarity on the Government's strategic priorities, and long-term planning horizons and develop predictable funding mechanisms to encourage alignment between the Government and the wider soft power ecosystem, while ensuring an enabling environment for independent efforts.**

More open communication between Government and the soft power ecosystem regarding the Government's strategic priorities and long-term planning horizons would go far in promoting the transition from short-term and transactional collaborations into authentic, long-term partnerships. This would enable greater soft power involvement and engagement in the strategic and long-term planning of UK visions, agendas and strategies, as well as increasing clarity on how soft power can best support Government objectives.

The plans to develop a new soft power strategy are therefore widely welcomed and provide an opportunity to provide greater clarity on the UK's overarching and soft power ambitions. Indeed, the process may also provide an opportunity to craft a compelling national narrative, which both the Government and UK soft power assets can play a crucial role in supporting. It is therefore essential that the strategy is developed with consultation and engagement with a wide range of UK soft power assets, beyond just those on the Council, to ensure a broad range of actors are able to 'buy in' and support these ambitions. It is also essential that the strategy is made publicly available to ensure those that are not involved in conversations around its development, and even those that are, are clear on the UK's ambitions and best positioned to support them.

In developing a strategy, due consideration should be given not to just to the Government's overarching priorities but also to providing clarity on planning

horizons and on how to develop predictable funding mechanisms which would enable organisations to more effectively build up long-term, authentic relationships and undertake more impactful collaborative work internationally. While it is understandable that the current economic situation has required difficult choices in public spending, confidence in this sector relies on long-term commitment and multi-year funding, and the more foresight Government can give organisations about future plans, the better they can prepare for them. In return, these organisations could bring greater clarity, transparency and agreement on the expected returns on public investment, as long as it is understood that the returns on investment in this field usually require a long-term perspective.

### **3) Enhance connectivity between soft power assets and overseas Posts, by better leveraging existing on-the-ground expertise, mechanisms and institutions.**

The UK's network of overseas Posts remains underutilised in the soft power sphere. Soft power assets require a deeper understanding of overseas Posts - not only in identifying key contact points but also in understanding what knowledge and support are available from in-country teams in terms of identifying local partners and opportunities and risks, particularly (but not only) in countries where it is more difficult to operate. In the same vein, overseas Posts also require more proactive outreach from domestic soft power assets in the form of education on how their knowledge and networks can best play into Posts' own objectives. This outreach should include the establishment of mechanisms by which to keep up regular contact, as well as sharing information about soft power developments and initiatives with the global diplomatic networks.

We therefore recommend that the Government encourages and facilitates a more systematic and meaningful two-way relationship between overseas diplomatic Posts and domestic soft power assets, better utilising and leveraging existing on-the-ground expertise, mechanisms and institutions, such as country-based British Council teams. Stronger mechanisms for communication and engagement would help both soft power assets to be better equipped with the understanding, contacts and strategic capacity to conceive and carry out collaborative engagement, and enable overseas Posts to better understand what tangible benefits harnessing soft power can bring.

### **4) Develop a 'digital gateway to the UK', a soft power digital platform where UK soft power assets can share resources, information on upcoming events and collaborate on projects to enhance the UK's global influence.**

The creation of a digital platform, accessible to both independent soft power assets and government officials, which could act as a hub of information on UK soft power resources and activities, would ease the wheels of cooperation across the soft power ecosystem and between the Government and soft power assets. The platform would act as a virtual space for both the Government and independent assets to share upcoming projects, priorities and collaborative opportunities, increasing awareness and

understanding of relevant activities between fellow soft power assets, Whitehall and the devolved administrations and help create opportunities for closer partnership and cooperation.

To avoid onerous requirements on soft power assets or the Government, appropriate thought must be afforded to streamlining the processes of information sharing on the platform and there must be strong clarity on its purpose to ensure it is used in the most efficient way.

**5) Develop provision for Whitehall Departments and devolved administrations to collectively address strategic issues and find practical solutions to opportunities and challenges in the soft power space, to improve the Government's ability to speak with one voice to the independent sector. This should include the development of soft power training resources for departments across Whitehall and the devolved administrations.**

A whole-of-UK approach to soft power requires a whole-of-government understanding and approach to soft power. Understanding of and support for soft power outside small pockets in the FCDO and DCMS remains weak. The creation of a mechanism for Government arms to come together to learn, share information, and collectively address strategic issues in relation to soft power is therefore a necessary starting point to boost cross-Government connectivity. Such a provision would better equip Government actors with the understanding, contacts and strategic capacity to conceive and carry out collaborative soft power engagement and understand the tangible benefits harnessing soft power can bring. It would also serve to strengthen the Government's ability to speak with one considered and coherent voice to soft power assets.

To achieve this whole-of-government approach, it may be necessary to develop and deliver soft power training resources to strengthen understanding outside of the Soft Power Council sponsoring departments of the importance of soft power. The UK Soft Power Group stands ready to assist with the development and delivery of such training, if desired.

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