



The Future of UK Soft Power: Building a Strategic Framework

Proud co-convenors:



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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 length and breadth of the United Kingdom. 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. We have established a constructive dialogue with the UK Government, and are recognised by the Government as a reliable source of insight on soft power matters.

Contributing Organisations

- Academy of Sport
- Association of Chartered Certified Accountants
- Ascot Racecourse
- Association of British Orchestras
- British Council
- British Film Institute
- British Foreign Policy Group
- British Horseracing Authority
- British Library
- British Standards Institution
- City of London
- Coalition for Global Prosperity
- Core Cities UK
- Great British Racing International
- HALO Trust

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- Ivors Academy
- National Theatre Wales
- Premier League
- Science Museum Group
- The Jockey Club
- UK Sport
- Universities UK
- Wilton Park

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

Towards a Vision and Strategy for UK Soft Power: Why, Why Us and Why Now

1. Encompassing culture, political values and foreign policies, soft power is a crucial component of a nation's global influence.¹ The United Kingdom has long held a depth of soft power assets, which have remained resilient in the face of significant domestic, political, economic and social change. However, while the UK is in an enviable position as an attractive, trusted international actor, this status is not guaranteed. The UK is facing growing challenges from our allies and strategic rivals alike in the soft power sphere, and in an increasingly polarised world, we cannot simply rely on past achievements to maintain our position. There has never been a more critical need for a clear plan on how to maintain and promote the UK's soft power strength.
2. This is a fact shrewdly recognised in the UK's Integrated Review of Security, Defence, Development and Foreign Policy, which identifies soft power as a critical tool for the proactive implementation of the UK's domestic and international strategic goals. From financial support for the Creative Industries Sector Deal, to committing to more active diplomacy in order to better influence the open international order of the future, the Integrated Review lays out clear Government commitments to both nurture and harness the UK's soft power. It also pledges Government investment and leadership in fields including climate action, girls' education and global health resilience, in order to advance its reputation as a 'force for good'.²
3. The subsequent Refresh of the Integrated Review, released in March 2023, further recognises the importance of soft power, acknowledging the need to shift away from binary conceptions of hard and soft power, and committing to embedding soft power in the UK's broader foreign policy approach. As a key stakeholder in the sector, the UK Soft Power Group seeks to support the Government in the delivery of these commitments, and its capitalisation on this opportunity for UK soft power.
4. This paper builds on the foundations laid out in the 2021 Integrated Review. It aims to develop a shared understanding between the Government and the soft power sector 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 nation's foreign policy and diplomatic arsenal. It seeks to support the practical advancement of internal planning on soft power during the implementation phase of the Integrated Review, and its 2023 Refresh, and 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, which accepts the independent nature and missions of soft power actors while facilitating long-term planning, enhanced dialogue with the sector, and cross-departmental coordination.

5. The UK Soft Power Group includes representatives from a wide range of industries from arts and sport to education and standards setting, and from across the UK's regions and devolved nations. Collectively these members possess vast actual and potential international capability and knowledge, and strong stakes in the UK's global image and influence. We seek to provide informed and judicious intelligence to support the development of soft power planning and the construction of a conducive, nurturing environment in which UK soft power assets can continue to grow and innovate.

6. In pursuit of strengthening the relationship between the Government and the soft power sector, and to harness the UK's soft power assets in pursuit of the UK's international objectives, this paper's recommendations are as follows:
 - Establish a Government-soft power engagement forum to aid connectivity and strategic-thinking between Whitehall, devolved administrations and independent soft power actors.
 - Ensure that the Minister responsible for soft power is recognised as the cross-Government Soft Power Champion, supported by a small team empowered to make targeted strategic interventions across Whitehall and beyond.
 - Introduce a light-touch Strategic Relationship Management System (SRM)-style account management system for soft power bodies to ensure that soft power considerations are able to more effectively gain traction across Whitehall.
 - Agree planning horizons, resources and funding mechanisms between Government and soft power actors to maximise their contribution to the UK's international objectives.
 - Create light-touch mechanisms to increase connectivity between soft power actors and overseas posts.

Mapping the UK Soft Power Landscape

Understanding Soft Power

6. Soft power engenders persuasion, attractiveness and magnetism and inspires imitation. It is roused from the most important elements of a society, such as stability, the rule of law, prosperity and opportunity. Cultivating it is a strategic, patient and long-term game. It encompasses both tangible and intangible resources - everything from our rich cultural history and language to our higher education system, our financial and legal services, our media and our sporting prowess. It includes our world-leading thinkers, creatives, and scientists, as well as our work within multilateral organisations, the sound functioning of our institutions, the natural beauty of our countryside, and much more besides.
7. Soft power includes both soft power assets themselves and the process of leveraging them for effect. As Joseph Nye put it, soft power is the ability to achieve a goal through attraction.³ While soft power assets provide the currency and ammunition to be utilised by a Government for a purpose, they themselves are not considered soft power; they simply grant a nation a bank of tools to fulfil an objective. Soft power, by Nye's definition, is therefore a nation's possession of the capability to effectively leverage these assets to achieve its goals.
8. As such, while the UK's soft power assets hold immense value in themselves, it is only when harnessed by the Government in pursuit of a specific aim that soft power is enacted. While recognising the need for soft power assets to maintain their clear independence, the Government therefore has a key role to play, through collaboration and cooperation with the sector, to create an environment that is conducive for soft power assets to flourish and to harness them in support of the Government's international ambitions.

UK Soft Power Assets

9. The UK has a longstanding and rich history of soft power and even in the face of recent international, domestic and geopolitical turbulence, its value remains strong. The sector is rich, has deep roots and is a significant presence on the world stage. A brief outline of a handful of these assets is given below as an insight into the immense impact and value of the UK's soft power sector.

Science and Technology

10. The UK's science and technology landscape is world-class. It is an environment that has built upon decades of scientific rigour and a strong peer-to-peer reputation that Britain continues to uphold. The UK possesses well-developed industry knowledge in sectors

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like renewables, space, Artificial Intelligence (AI) and vaccine technology, and has the capacity to harness these sectors effectively for innovation. For example, experts in the fields of green energy and space have recently been brought together to form initiatives such as the Floating Offshore Wind Task Force and the North West Space Cluster - initiatives that aim to pave the way for the UK to become industry experts in their respective fields.⁴

11. Similarly, the Grantham Institute and Oxford University's Environmental Change Institute have been, and will remain, pivotal in advancing UK expertise in renewable energy, while UKRI's investment in optimising data investment will be integral to advancing rapid risk analysis, cybersecurity and health resilience.⁵ The UK's science and technology expertise was also foundational in the creation of the home-grown Oxford-AstraZeneca vaccination for COVID-19, which was harnessed effectively to bolster both domestic and global health resilience.⁶
12. This world-class landscape exemplifies the pull of the UK's power of attraction. For example, in 2019/20, almost half of academic research staff at Universities UK member institutions were non-UK nationals.⁷ The pull of academic talent within this sector not only reflects our thriving scientific landscape but also positive perceptions of the UK as a place to live, develop and thrive. The soft power of our science and technology sector also attracts impressive overseas investment - in 2019 the UK ranked second globally for overseas investment in the Life Sciences - with businesses confident in the calibre of UK scientific research and therefore in the likelihood of investment return and future profitability.⁸

Education

13. The UK boasts a highly respected higher education sector, home to four of the top ten universities globally.⁹ Its world-leading higher education and research institutions attract talent from across the world, which not only brings direct economic benefits to the UK, but also nurtures vast networks of international exchange of ideas and people and embeds longer-term partnerships in which mobility is also boosted.¹⁰
14. Informal knowledge-based diplomacy, in particular in science, can also help to build long-term bilateral relationships. For example, the UK and Portugal's June 2022 Joint Declaration on Bilateral Cooperation exemplifies how academic institutions can be harnessed to lead the way in international cooperation and aid the formation of closer bilateral and diplomatic ties. The Declaration features agreements to facilitate engagement between Portuguese and British research institutions and the wider science and innovation community, to tackle shared global challenges, threats and opportunities - including climate change, emerging technologies, global health and renewable energies.¹¹

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15. Moreover, high numbers of international students and university researchers entering a nation promotes a deeper global understanding of that nation's cultures and values, as students go beyond mere familiarity towards establishing personal friendships and connections across national boundaries. International students therefore often leave the UK with a strong sense of cultural and national affinity for the nation, making them more likely to return as tourists or as skilled migrants.¹²
16. The UK also boasts a variety of professional bodies which offer globally recognised qualifications to students across the world. Bodies such as ACCA and the Royal Institution of Chartered Surveyors (RICS) have global networks of members working with UK-issued qualifications; ACCA has 241,000 members and 542,000 students, working in 178 countries around the world, including within overseas national and local governments, supreme audit institutions and major multilateral institutions.¹³ The global reach of UK professional bodies raises international recognition of UK excellence when it comes to professional education and qualifications.

Standards, Regulation and Governance

17. 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 of firm values in their fields. For example, the British Standards Institution (BSI) was the first National Standards Body globally, and a founding member of the International Organisation for Standardisation, within which it still enjoys strong policy and technical leadership.¹⁴
18. 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.¹⁵ Similarly, in the wake of the Grenfell tower tragedy, RICS created an international coalition to promote what became the International Fire Safety Standards Common Principles. In 2021 it was adopted by the UN as the first ever common global standard for fire safety, reaffirming the UK's position as a leader in global standards-setting.¹⁶
19. 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 the Ministry of Finance of Kazakhstan to upskill over 400 public sector financial professionals on International Public Sector Accounting Standards.¹⁷ This work is key in extending the visibility of the UK's firm values on robust regulation within key markets and forums.

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20. 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. For example, the FCA has strong international influence in standard-setting bodies, like the European Securities and Markets Authority, the International Organisation of Securities Commissions and the various committees of the Financial Stability Board. Harnessing domestic expertise in regulation, the UK is able to position itself as a nation with a strong reliable rule of law and provide confidence to partners in the regularity and stability of engaging with the UK, as well as encourage strong international commitments to open, fair and transparent cooperation on trade and governance for the benefit of all.

Sport

21. The UK is home to some of the world's most iconic sporting stars, teams and venues. These are accompanied by an enviable number of wider sporting assets - from sports aid and exchange programmes, to sporting ambassadors and world-class sport production and analysis capabilities. Sport is a critical soft power tool that can assist with the development of mutually beneficial, long-term cultural relations, as the contemporary global sports world is by nature underpinned by international exchange and collaboration, and requires actors to understand local cultural perspectives and sensitivities when they speak and engage beyond national borders.
22. The UK's sporting excellence plays a key role in spreading awareness and engagement with UK culture, and improving perceptions of UK openness. UK sport excels at pulling enormous global audiences, with The Grand National at Aintree broadcast to a collective audience of 600 million, and the Premier League alone is watched by 4.7 billion people across the world.¹⁸ The London 2012 Olympics and Paralympics were watched by more than 50% of the world's population, with 36% of viewers stating that the Games had made the UK more attractive as a place to study or do business, and 35% of viewers subsequently were more likely to visit the UK. The events also facilitated broader cultural programmes, such as the Cultural Olympiad and the 'UK Now' arts and culture programme in China.¹⁹
23. Sports diplomacy can also act as a powerful soft power tool at the devolved level as well, with Wales investing in sport as a low-risk and relatively low-cost but high-profile method to raise its international profile. For example, in May 2018, the Welsh Government hosted a reception for the Welsh Rugby Union in Washington DC. This event, acting as an informal sports diplomacy summit, brought together guests from business, politics and the diaspora, helping to form valuable connections for the promotion of Welsh soft power.²⁰
24. British sporting initiatives can also help support the promotion of UK values on the world stage, including its commitments to the UN Sustainability Goals.²¹ Peace-building and

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reputation enhancing efforts like Try Rugby, a British Council and Premiership Rugby initiative, use rugby lessons as a tool to engage with children and young people in different States in Brazil, and promote health, education and social cohesion. The programme aims to tackle some of the social issues affecting young people, such as lack of inclusion or juvenile crime, and help cultivate an increasingly positive image of the UK abroad.²² Similarly, the innovative award-winning Fight for Peace initiative - a youth-led organisation that combines boxing and martial arts training with education and personal development support - works internationally to support young people to reach their full potential, and to promote peace in communities with high levels of violence.²³

British Culture

25. The UK's extensive cultural outputs attract huge audiences globally. More than 40% of visitors to the UK are motivated to visit due to its expansive cultural offering, and nearly three-quarters of global audiences recognise "Britishness" as a mark of high quality in culture. This is in large part driven by the sector itself, with 66% of people who have previously visited the UK citing seeing British locations and landmarks in film or TV as influencing their decision to visit - a testament to the screen sector's excellence and ability to showcase British talent.²⁴ The UK's cultural outputs also have extensive reach on international soil; collectively, members of the Association of British Orchestras toured 40 countries in 2019, reaching international concert audiences of over 550,000 people.²⁵
26. Furthermore, the British monarchy, one of the UK's most well established cultural assets, has a significant global reach. The late Queen Elizabeth II visited over 120 nations and hosted 112 state visits during her 70 year reign. Her unique position and experience enabled the curation of enduring relationships with countries and peoples and the Queen's ability to charm and develop personal relationships with leaders and nations was an extraordinarily valuable diplomatic tool. For example, the Royal patronage of racing remains the single biggest factor in the inward investment into the sport, both on an ownership and sponsorship level, and there are races in Australia, the USA, Japan and Hong Kong that are named after The Queen.²⁶ Her late majesty's death brought to an end one of the world's most active and impactful diplomatic careers, and we must await to see how King Charles III maintains the global connections his late mother forged, and how, under his rule, the soft power influence of the Crown evolves.
27. Importantly, it is not just the existence of the UK's cultural assets but also their values and behaviours which reflect on perceptions of the UK globally. Open and collaborative ways of working, such as those displayed by institutions like the British Museum, the Science Museum, and the British Library, can help position the UK as an open collaborator, with an internationalist outlook and a permissive environment for global engagement. The British Library, for example, works with around 60 countries a year, and through its digitisation initiatives and partnerships, has opened up access to millions of pages of collection items online, positioning the Library as one of the most open

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collaborators in the sector, reflecting positively on the UK's wider position as a collaborative partner.²⁷

28. These soft power assets are 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. For example, the Science Museum has been able to foster strong diplomatic relationships with allies and strategic rivals alike, via international initiatives such as the *Superbugs: The Fight for Our Lives* - an exhibition shown in seven countries, that reached more than 1.6 million people in seven countries, and which fostered further projects in both China and India to create adapted shows to tour the two nations.²⁸ These organisations are able to capitalise on their arms-length Government body status, working with states such as North Korea, China and Iran, providing opportunities for collaboration when formal diplomatic relations have been fraught. These engagements are not without difficulties but these activities can work to soften challenging relations and provide a foundation for building warmer Governmental relations between such nations, as appropriate.

The English Language

29. The English language is spoken by around a quarter of the world, helping ensure that the UK has a route into every open global market and making international travel and cooperation significantly easier. It helps popularise the UK's arts and culture internationally, with a global interest and desire for British cultural output, which helps to communicate our culture and values across the world.²⁹
30. This strength is consciously harnessed by the British Council, which plays a key role in teaching the English language abroad, paving the way for cultural, economic and political connections and engagement for the UK, and opening up new opportunities for students, who may come away with new perspectives and a greater understanding of, and affinity for, our country. While the English language is now the property of the world, there is considerable prestige for the UK as the home of the world's global medium of interaction.
31. Institutions such as the BBC World Service benefit from the existing prominence of the English language and contribute to its reinforcement. In doing so, the BBC World Service also exists as the hallmark of trusted journalism, providing a source of truth to journalists, professionals and other individuals across the world, and building engagement and trust for the UK through mutual bonds of culture and values. The BBC World Service, and its Monitoring Service and Media Action charity, form a critical part of the social fabric of many nations, and are crucial mechanisms for promoting British values abroad.³⁰

The Growing Value of the UK's Soft Power Assets to the UK's Success

32. The UK's soft power assets are clearly vast and deep and they therefore play a key role in supporting the advancement of UK domestic and international strategic interests. Successfully harnessed, they are of significant utility as prominent components within the UK's foreign policy and diplomatic arsenal.

Improving Domestic and International Peace and Security

33. 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 in improving domestic and international peace and security. On the soft power end of defence, this includes historic military and security expertise, our 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 is considered a 'hard' method 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.
34. 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 allies and working as an active deterrent to potential rivals. Moreover, as the UK continues to lead on collective defence, assuming command of NATO's Response Force in January 2022, these activities are invaluable in inspiring confidence domestically and internationally in the UK's institutional security and defence capabilities.
35. The UK's reputation for military leadership also 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.³¹

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36. The vital work of conflict and humanitarian UK NGOs such as The HALO Trust is also key in directly improving international security, while also ensuring that the UK remains a global humanitarian centre of excellence. The HALO Trust works globally, from securing weapons alongside the El Salvador authorities to build a safer future for El Salvadorans, to delivering emergency aid in Afghanistan following the 2021 withdrawal of the allied forces. Peace-promoting initiatives like the Conflict, Stability and Security Fund, and the Global Mine Action Programme also commission the vital security expertise of The HALO Trust and other UK NGOs like the Mines Advisory Group, to directly reduce conflict and promote peaceful post-conflict livelihoods.³²
37. Key British cultural institutions also play an important role through education, de-escalation and training programmes in areas of instability in the world.³³ Programmes such as Premier Skills, co-organised by the Premier League and the British Council, use football as a means of building skills, challenging stereotypes, and providing positive opportunities for almost a million young people across 25 nations. This provides alternative pathways away from conflict and terrorism, contributing to global peace and security. Moreover, by teaching English, exploring shared values, and hosting inter-cultural events such as the UK-China Cultural Dialogue, the British Council engages directly with both allies and rivals, deepening bilateral ties, de-escalating tensions, and aiding constructive non-governmental dialogue.³⁴
38. The variety of deals the UK has secured with nations with which it shares historic diplomatic ties also upholds the trend that longstanding diplomatic relationships can be critical in advancing key geopolitical strategic interests. Notably, the UK's longstanding diplomatic relationships with Indo-Pacific nations have been key as we move towards the Indo-Pacific tilt, owing to historical ties and the UK's strong reputation in the region. From signing the Digital Economy Agreement with Singapore and the Enhanced Trade partnership with India to forging defence partnerships like AUKUS and holding a strong position of influence within the Asian Development Bank, the UK has been able to leverage its soft power ties with strategically located states – embedded in cultural, commonwealth and sporting connection – to advance its strategic interests, and win economic and security dividends in a geopolitically crucial region.

Advancing International Leadership and Influence

39. A nation's capacity to drive international change depends as much on influence, diplomacy and international networks, as it does on GDP or military might. The UK's expanse of soft power expertise, influence and diplomatic ties are fundamental to its legitimacy in international fora.
40. The UK's specialist expertise in sectors such as renewables, climate finance and sustainable development, and its pioneering acts - such as being the first nation to legally mandate greenhouse-gas reduction and to commit to Net Zero by 2050 - have been central to building a strong base of legitimacy in climate action. This was essential

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to enabling the UK to secure and galvanise support for ambitious commitments on climate change at both COP26 and the G7 last year.³⁵ Similarly, the UK was able to utilise its expertise in vaccinations to spearhead the G7's pledge to drive and intensify global vaccination efforts. Most importantly, this helped reduce the worst of the virus' impacts globally but it also benefited the UK and the G7 in both security and wider soft power terms.³⁶

41. UK expertise and innovation also give the UK the credence to lead in developing international standards; a critical tool for shaping the rules-based international order. The UK's international competitiveness and expertise in several business and policy areas of AI, for example, lends the UK legitimacy in its efforts to advocate for, promote, and shape global AI regulations. The Alan Turing Institute, a world-leading data science and AI research institute, has launched a new AI Standards Hub, with the support of BSI and the National Physical Laboratory, designed to increase UK contribution to development of global AI technical standards, and collaborate partners around the world to emphasise the importance of international alignment on AI standardisation.³⁷
42. Soft power assets are also instrumental in exhibiting such knowledge and expertise on the world stage. For example, the Science Museum hosted the UK Government Global Investment Summit in October 2021, in association with the UK's presidency of COP26. With many heads of state and corporations in attendance, the Summit provided an opportunity to showcase the very best of the UK's clean technologies and innovation and how the UK can shape the future of green investment.³⁸

Improving Economic Resilience

43. The UK has a trusted, attractive economy which supports stability, resilience and openness both in the UK and globally. From education to sport and cultural institutions, the UK's soft power resources are foundational to its economic growth and have shown resilience in the face of significant domestic, political, economic and social change over recent years.
44. These economic benefits are both direct and indirect. In 2019, cultural organisations contributed £34.6 billion to the UK economy, while sporting bodies and institutions contributed £48.9 billion.³⁹ Meanwhile, the UK's wider creative industries contributed an estimated £115.9 billion to the UK economy in the same year, providing over 2 million jobs and accounting for 5.9% of the UK economy. The creative industry remains particularly resilient, having grown three times the rate of the overall economy since 2008.⁴⁰
45. Soft power resources are also 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 has the potential to deliver

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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 more than 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; over £14 billion of trade and investment benefits were generated by London 2012.⁴¹

46. The UK's strong reputation in standard-setting and the knowledge economy also reap economic rewards for competence in professional jobs such as engineering, law, and accountancy. As leaders in the standard-setting and knowledge economy, UK institutions and workers are called on to consult on multinational issues, lead on overseas projects and 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.⁴²
47. Finally, cultural and diplomatic institutions are also fundamental in fostering economic prosperity; embassies and the wider diplomatic network act not only on a macro level to improve bilateral relations but also as 'super-facilitators', connecting businesses, organisations, and individuals abroad.⁴³ While our international cultural and diplomatic assets need targeted and tactical support to maximise their reach and influence, their mere presence can generate economic benefits for the UK. Research suggests that a one percent increase in the number of countries in which a country like the UK establishes a presence for its state-supported cultural institutions such as the British Council can support an up to 0.66% increase in inward FDI, as well as a 0.73% increase in international students.⁴⁴

Supporting Levelling Up

48. The UK's Levelling Up agenda and soft power initiatives are critically interdependent and highlight the mutual reinforcement possible between international and domestic policy. Investment in local cultural infrastructure can serve to not only deliver positive impacts for domestic populations but also enhance the UK's international soft power influence, improving its magnetism for tourists, international students and overseas investment. Meanwhile, soft power initiatives can be instrumental in boosting regional productivity, pay, jobs and living standards as well as spreading opportunities and prosperity.
49. Cultural institutions, from museums to theatres to libraries play an important role in the renaissance of an area, positively impacting the economy, and driving international

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tourism, talent and investment to new areas.⁴⁵ For example, the newly redeveloped Paisley Museum and Art Gallery in Scotland is expected to attract 128,000 visitors each year from the UK and overseas, and provide a £79 million economic boost to the area over the next 30 years.⁴⁶ Beyond individual institutions, larger scale cultural hubs also drive both regional economic prosperity and international acclaim. Bristol's film expertise has seen it internationally recognised as a UNESCO City of Film, and draws in thousands of international visitors to its 11 annual international film festivals, each providing a diverse and dynamic programme of events.⁴⁷

50. Meanwhile, Liverpool's long-term cultivation of cultural assets led to the city being hailed as 2008's Capital of Culture, which in turn resulted in a £1.6 billion return in investment and visitor spending, and has seen the city consistently positioned as the fifth most listed UK city for international visitors.⁴⁸ Liverpool's cultural offering also played a key role in its winning bid to host the 2023 Eurovision Song Contest on behalf of Ukraine. This is expected to generate around £28m in international visitor spend, and a further £12m from UK visitor spend.⁴⁹ Moreover, Bradford, recently revealed as the UK's City of Culture 2025, holds international aspirations at the core of its ten year cultural strategy, in recognition of the international draw that local regeneration can have. Pledging to deliver exciting international collaborations during 2025, and, with investment in its cultural industries, aiming to become 'a place where artists from all over the country and all over the world want to come', Bradford's vision encompasses the mutual reinforcement possible between the domestic and international spheres.⁵⁰
51. UK soft power institutions are therefore eager to engage in the Levelling Up agenda and independently have begun incorporating it into their strategic thinking. The British Film Institute (BFI), for example, has introduced a UK-wide principle into its ten-year National Lottery strategy requiring that every award made over the next ten years must demonstrate how it will support activity that benefits people across the nations and regions. This builds on the BFI's previous region-specific interventions such as the National Cluster Growth fund, which has supported the development of significant regional screen bodies such as Screen Yorkshire and Create Central, and its direct engagement with Government to support the delivery of its flagship Levelling Up fund.⁵¹ Moreover, the Arts Council has also embedded the agenda into its investment planning, identifying 109 local authority areas, all outside of London, to be categorised as 'Levelling Up for Culture Places'. All of the £43.5 million of additional investment the Arts Council will receive from the Government for the period 2022-25 will be committed to benefitting cultural institutions and organisations outside of London.⁵²
52. Similarly in sport, the Football Foundation has created a roadmap of the football facilities needed across every local authority area in England - 318 bespoke plans, to ensure every local authority across England has the facilities to empower young people, strengthen communities, and improve mental and physical health across the nation.⁵³ The UK's sporting sector can help ensure funding reaches places, organisations and

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people that have previously not had ready access to physical activity facilities and address inequalities to activity faced across less affluent areas of the UK.

53. These efforts highlight how a breadth of soft power assets are partaking in programmes that can be harnessed by the UK Government in support its Levelling Up agenda, and in turn promote the regeneration of areas outside of the capital which have the potential to draw in international footfall, students and investment and serve to promote the UK's international soft power influence.

The Opportunities of Soft Power Initiatives Spearheaded by Devolved and City Administrations

54. 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.
55. 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 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.⁵⁴ Wales, for example, has a 5 year Diaspora Engagement strategy that maps how it will harness the power of the Welsh diaspora to raise Wales' global profile, showcase areas of Welsh excellence and position Wales as a globally responsible nation.⁵⁵ This strategy is accompanied by bodies such as GlobalWelsh - a non-profit dedicated to providing a community for Welsh people, forging new connections, and celebrating Welsh talent around the globe.⁵⁶ While UK cities and city-regions tend to have less formalised individual soft power strategies and bodies, important work has been done by institutions such as Core Cities UK and the British Council to effectively identify, assess, and harness the domestic power dwelling within UK institutions, people, values, and cultural hubs, in order to better utilise and coordinate the UK's regional assets.⁵⁷
56. De-centralised soft power initiatives present clear opportunities to promote the full spectrum of the diversity of British assets and make a more powerful case for the UK as an attractive business environment, destination and partner. Firstly, regional soft power initiatives can support strong bilateral relationships with foreign national and city governments, which can support UK-wide interests. For instance, Wales has utilised its

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soft power assets to establish strong bilateral relations with specific regions and nations in Africa. The Dolen Lesotho-Cymru partnership has been running for over 25 years and through combined sporting events and school linkages, has helped build and maintain strong bilateral ties between the two nations.⁵⁸ Similarly, Scotland has built a strong bilateral relationship with Malawi, which has, in turn, been prominent in promoting a positive image and closer relations with the UK. For example, the Scotland-Malawi Partnership - a national civil society network supporting the people-to-people links between the two nations - has facilitated the creation of the Malawi-UK Business Group, which encourages trade between the UK and Malawi.⁵⁹

57. Moreover, direct city-to-city diplomacy, such as twinning arrangements, can raise cities' international profile while also expanding UK economic ties and market share internationally.⁶⁰ The benefit of city diplomacy is that it has less structure and can be more agile than national engagement.⁶¹ City-to-city diplomacy can also be a tool by which to collaborate with cities overseas to influence multilateral policymaking. This is exemplified in the efforts of the G7 Urban7 network (U7), which was launched in 2021 by Core Cities UK, and facilitates shared dialogue and cooperation between city administrations across the G7. This diplomacy both enables UK cities to have their voices heard across the G7 and provides the opportunities to cement UK interests into multilateral communiqués and policy.⁶²
58. Through investment in region-specific expertise, decentralised soft power initiatives 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.⁶³ These soft power assets have been nurtured by local investment initiatives, which have recognised and capitalised on enlarging expertise. For example, the Scottish Government has announced multi-million-pound funding for Scotland's Centres of Expertise to tackle climate and environmental challenges, and the Welsh Government implemented its first International Strategy and Minister for International Relations, in response to its expanding world-leading industries.⁶⁴
59. In 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.

International and Domestic Challenges Facing the UK's Soft Power Sector

60. In an increasingly competitive and complex world, the UK's soft power sphere is facing growing challenges both internationally and domestically, which necessitate urgent and important intervention to ensure the UK's soft power continues to flourish.

The International Landscape

The Challenges Posed by the UK's Strategic Rivals to the UK's Soft Power Sector

61. Against the backdrop of an increasingly polarised world, the UK's strategic rivals are seeking to strengthen and harness 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.
62. China's renewed focus on soft power is of particular note. Its Belt and Road Initiative, the Chinese-led New Development Bank and the Asian Infrastructure Investment Bank are providing states with an authoritarian alternative to the plurilateral and collaborative approach to development and the multilateral domains in which the UK has traditionally asserted soft power influence. China has also sought to usurp the soft power benefits of multilateral development banks, providing direct support to nations instead. For example, in 2020, Chinese overseas foreign direct investment into Latin America amounted to approximately \$17 billion. This has formed part of a wider strategy of influence-building in Latin America, known as its 'South-South cooperation', designed to present China as a trustworthy alternative to Western partners.⁶⁵
63. China has also sought to gain influence in the multilateral forums in which the UK has traditionally exerted influence. It is now the fifth-largest contributor to the UN's regular budget, UN peacekeeping, and other development-focused entities, and the 6th largest donor to the International Development Association, a part of the World Bank Group.⁶⁶ It has begun to utilise the strength of position it now occupies in these multilateral institutions, for example using diplomatic muscle to block Taiwan's participation at the International Civil Aviation Organisation and the World Health Organisation (WHO).⁶⁷
64. The UK also finds itself in sharp competition with strategic rivals in the science and technology sphere. China is now the world leader in producing high-impact scientific research, and with its investment in research and development significantly outstripping that of the UK, this trend is set to continue.⁶⁸ The Chinese Government is also making a renewed push to invest in overseas students in order to retain its world-class scientific standing, offering a greater range of international scholarships than its Western strategic rivals. In 2018 alone, the Chinese Government offered scholarships to 250,000 students

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from Belt and Road Initiative countries.⁶⁹ 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.⁷⁰ 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.

65. Meanwhile, recent developments in the Russian space sector pose a challenge to the UK's growing interests in the sphere. Russian state space agency Roscosmos, which will begin construction of a new Russian space station in 2025, has signed a memorandum for the construction of a lunar base with China, representing a drawing of lines between Western space actors and their collaborating strategic rivals.⁷¹
66. A distinct challenge is rivals' manipulation of the rapidly changing information and communication environment. The UK has traditionally enjoyed a strong reputation for open, trusted and credible information, via key soft power institutions such as the BBC World Service. However, the British voice is increasingly coming directly up against rivals' media sources. China Radio International broadcasts in 38 languages from 27 overseas bureaus, and also reportedly runs a covert network of more than 30 radio stations in 14 countries.⁷² Meanwhile, Russia Today has infiltrated both advanced and developing economies to promote national propaganda, most notably using information warfare as a tool during its invasion of Ukraine.⁷³ These alternative news sources provide a direct challenge to BBC World Service and a threat to the soft power benefits this generates for the UK.
67. Turning to the Indo-Pacific, a key priority in the UK's Integrated Review, our strategic rivals are investing heavily in their soft power in the region. Seven of the BRI's top ten destinations for infrastructure investment are ASEAN member states, Huawei and ZTE are in the process of building 5G networks across much of Southeast Asia, and China has established vocational training centres in the region to provide technical training for locals using Chinese technology and under Chinese standards.⁷⁴ Securing success and UK interests in this region will therefore require not only military but also soft power investment to build relationships with governments and publics alike to counter China's soft power efforts.

The Relative Competitive Advantages Being Extracted by the UK's Allies

68. Competition in the soft power sphere comes not just from our strategic rivals, but also from our allies, with seven of our traditional allies receiving a 70-73% approval rating in British Council research into the most attractive nation in the G20. Meanwhile, the United States topped Brand Finance's Global Soft Power Index 2023.⁷⁵

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69. A significant factor in the growing competition the UK faces from its allies is the vast investment these nations are making in soft power, which significantly outstrips the UK's investment - Germany's foreign office alone invested £224 million into its Goethe-Institut in 2020/21.⁷⁶ Although investment by allies in soft power should in many ways be welcomed as a clear benefit to the West's soft power at a time of increased polarisation, it is also clear that this threatens to undermine the UK's own comparative advantage. Continued investment in and support for the UK's cultural institutions is therefore essential to keeping up with our allies and maintaining the UK's soft power prowess.
70. The UK can also learn from its allies how to most effectively harness its soft power assets as strategic foreign policy tools. Germany, for example, has integrated cultural relations into the third pillar of its foreign policy agenda since the 1970s, ensuring soft power is central to Germany's wider strategic agendas. This integration has resulted in a coherent and strategic approach to cultural relations within the Federal Government, in which cross-Governmental coordination is key. Resulting projects include, for example, in 2020, the Federal Government using its Foreign Cultural and Educational Policy to strengthen international cooperation and cultural exchange at civil society level within Russia and Eastern Partnership countries, during politically contentious times. €20 million was budgeted for 170 projects to strengthen relations, including German-Polish cooperation projects for the first time.⁷⁷ 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, such as democracy, political pluralism, rule of law and the protection of minorities, has been outstandingly successful in terms of improving and managing Germany's international reputation.⁷⁸ 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.
71. Meanwhile, France extensively encourages cultural exchanges, such as 2017's France-Colombia Year and 2018's France-Israel Year, as opportunities to build stronger geopolitical and geostrategic relations as well.⁷⁹ Allies' integration of soft power into the highest level of Government policymaking is enabling them to effectively strategise, cultivate and utilise their resources at every foreign policy turn. The UK must follow suit and ensure soft power sits at the core of the UK's wider international strategies and agendas, in order to ensure the sustainable maintenance of its current soft power advantages in the face of growing competition.
72. This will be increasingly important as allies, as well as rivals, seek to build relations in nations that the UK also seeks to do so. In the Indo-Pacific, for example, Australia has extensively sought to strengthen its already strong presence in the region through initiatives such as the 'New Colombo Plan' which supports Australian undergraduates to study and undertake internships in the Indo-Pacific.⁸⁰ Meanwhile, France has released an

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Indo-Pacific strategy committing to assuming a greater role in Indo-Pacific regional organisations and strong involvement in settling regional crises.⁸¹ As the UK overtly tries to pursue its Indo-Pacific tilt, spending, diplomacy and security measures pursued by Australia, the United States and Japan, will test the resolve of the UK's soft power influence in the region. In such saturated landscapes, the UK Government must think strategically about how it can enable its soft power resources to flourish, and in turn reinforce perceptions that the UK is a force for good in these regions of the world.

The Domestic Environment

73. Foreign policy is dependent as much on what is happening domestically as what is happening internationally and the UK's domestic challenges therefore have a significant impact on the UK's soft power success. In recent years however, a number of challenges, from Britain's withdrawal from the EU to the pandemic and the energy crisis, have made it particularly difficult for the UK soft power sector to thrive.

The COVID-19 Pandemic

74. The COVID-19 pandemic caused major challenges across the UK and the global economy but many soft power institutions were particularly sharply affected. While many organisations devised temporary initiatives, such as the National Theatre At Home project and the Virtual Grand National, the in-person nature of much of the revenue generation in the soft power sector has meant the impacts of Covid-19 restrictions were particularly harshly felt.
75. Even as restrictions in the UK eased, the dependence of the UK's education and cultural sectors on overseas visitors - three quarters of visitors to the British Museum and around half of visitors to the Victoria and Albert Museum are from overseas - meant that ongoing global travel restrictions continued to pose challenges.⁸² The long-term legacies of the pandemic such as the rise of virtual meetings and the decline of business tourism have also significantly hit the sector, with the hotel industry expected to experience a decrease in sales of around 18% in 2022.⁸³ The pandemic has also exacerbated skills and workforce gaps in the arts and culture and sports sectors, as well as contributing to a significant loss of human capital deriving from multiple lockdowns, years of economic instability and cancelled events.⁸⁴
76. The pandemic fundamentally underscored the financial vulnerability of the UK's soft power sector, particularly under its current funding model. Innumerable soft power institutions, like museums, galleries and theatres were placed in jeopardy, due to their reliance on visitors' income. Moving forwards, support is still needed to help the sector to rebuild and recover post-pandemic and longer-term strategic thinking must be done to protect the sector's longer-term financial resilience.

Britain's Relationship with Europe

77. The UK's decision to leave the European Union has presented a number of teething issues for the sector, as well as some more deep seated challenges. In particular, the decision to leave has disrupted the ease with which UK soft power organisations are able to engage with other European states. This emerges across a range of areas, from impacting the ways in which VAT is applied to difficulties navigating the post-Brexit customs landscape. For example, the Association of British Orchestras outlined in a written contribution to this report, that work permit rules across the EU, customs controls and road haulage limits have made touring significantly more challenging and have meant orchestras have lost opportunities to international competitors.⁸⁵ Meanwhile, the increase in EU student tuition fees emerging as a result of Brexit has seen the number of EU applicants to UK universities drop 59% between 2020 and 2021.⁸⁶
78. A particular challenge has been the soft power sector's, and particularly the cultural sector's, reliance on EU funding, with the UK receiving €68 million in direct funding from Creative Europe between 2014-2020.⁸⁷ The sector has been particularly vocal about the impact of Brexit on its industry, with 80% of musicians believing that touring in Europe will no longer be financially viable and 60% considering leaving their profession in light of the changes.⁸⁸ Similarly, with the UK still negotiating its relationship with the EU's £95.5 billion Horizon research programme, many UK research projects face major funding gaps and potential closure. The uncertainty of this, and wider immigration rules for European researchers, has also led to a mass exodus of European researchers from UK universities, with significant implications for the strength of the UK's research and its reputation in this field.⁸⁹
79. Leaving the EU has also significantly impacted the sector's ability to influence within the EU. For example, while BSI remains a member of the European Standards Organisation, CEN, it has lost some of its influence and is now at risk of losing its formal voting power within CEN, as the European Commission pushes to restrict voting rights to EU and EFTA countries.⁹⁰ This change in relationship and loss of influence within European circles has also altered international perceptions of the UK's place in the world, with the UK's importance to the United States under increased scrutiny.
80. In recent years the UK has made great efforts to carve out its post-Brexit identity, with Global Britain at the forefront. Nonetheless, issues around funding and reduced ease of movement of both people and products pose additional challenges for the UK to address in seeking to promote and protect its soft power sector. One suggestion from the UK Government has been the creation of a Cultural Export Office.⁹¹ Such an initiative could provide financial and administrative support to assist the Government's efforts to strengthen bilateral relations with European neighbours and allies and help rebuild the cultural sectors' international competitiveness, post-Brexit.

The Energy Crisis

81. Europe's ongoing energy crisis and the wider cost of living crisis in the UK are posing additional challenges to the sector. The economic challenges this brings will have a significant impact, particularly on cultural institutions which are reliant on customer income at a time when disposable incomes are falling.⁹² At the same time, while revenues fall, the energy crisis and supply chain issues are driving up operating costs. The challenge is again felt particularly sharply in the cultural sector because these industries typically rely on highly-motivated, initially poorly paid, and often self-employed workers, who are particularly vulnerable to inflationary pressures, pushing up staffing costs either in terms of pay increases or high staff turnover.⁹³
82. Furthermore, with the energy crisis highlighting the urgent need to prioritise a shift to renewable energy sources and energy independence, this also comes with additional costs. Re-insulating of buildings, decarbonising, and company-wide training for staff on sustainable practices are important measures which the soft power sector is proud to lead on but nonetheless place additional economic burden on these organisations.⁹⁴ Additionally, the net zero transition could have significant impacts on all forms of travel, as businesses and consumers become more conscious of carbon footprints.⁹⁵ While this presents an opportunity for domestic tourism and culture industries, with cultural industries particularly reliant on international tourism, this poses particular challenges to their longer-term stability.

Resource pressures

83. Instability regarding Government funding channels has put pressure on institutions' operations and restricted their long-term ambitions. The Government's most recent 2021 reduction in Grant-in-Aid to the British Council has restricted the Council's traditional work on educational development and cultural relations. For example, the Council had to cease all grant-in-aid programmes in 11 countries and deliver Grant-in-Aid programming through offices in other countries in a further nine.⁹⁶ The gradual reduction of the British Council network - between 2013 and 2018, the number of global British Council offices decreased from 196 to 177 - has reduced the British Council's capacity to support soft power institutions in their international work.⁹⁷
84. This has impacted the ability of partners to create partnerships abroad too, according to the National Theatre Wales, by limiting the capacity of the British Council to facilitate connections with on-the-ground partners. National Theatre Wales also disclosed that it is building a critical soft-power-projecting partnership in the Eastern Balkans but is having to seek out funding and support for operations from very removed schemes that are entirely outside of the UK Government's remit. Far from when Eastern Balkan states

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had dedicated British Council and British Council Arts Officers to facilitate soft power projects, the network of on-the-ground expertise has declined due to financial restraints.⁹⁸ A perception of UK dysfunction is reported to have spread among international partners in bilateral projects as British cultural facilitation often does not match that of partners.⁹⁹

85. It is therefore crucial that more effective and sustainable funding models are found to support the taxpayer-funded elements of the soft power sector and their activities. 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.
86. Moreover, UK Soft Power Group members have highlighted the restriction that existing funding models can place on the success of long-term, international projects. Wilton Park outlined in the research of this report that uncertainty of securing future funding has limited its ability to discuss with partners the feasibility of a series spanning more than one year.¹⁰⁰ National Theatre Wales similarly highlighted that for the theatre to establish a legitimate, long-term set of international cultural relationships, a series of online projects and collaborations, over multiple years, is necessary. Big, soft-power-producing projects can first require three or four years of nurturing the critical relationships and building the necessary infrastructure. Without multi-year funding, authentic soft-power projects are therefore often unfeasible.¹⁰¹ An examination of the effectiveness of current resourcing is necessary to support the development and maintenance of durable, long-term soft-power-projecting international partnerships.

The State of the UK's Soft Power Ecosystem

87. While the source of much of the UK's soft power lies beyond the remit of the Government, the Government nonetheless has a critical role in creating a conducive, enabling environment in which soft power assets can flourish, mutually reinforce one another, and aid the Government in the pursuit of its strategic goals. Such a positive environment can also improve HMG's ability to meet long-term international goals.
88. Strong connectivity between the Government and the soft power sector is therefore critical in creating a thriving soft power environment. Practical and efficient cross-sectoral mechanisms can foster closer collaboration, improve communication structures, support better strategy development and enable soft power actors to support wider UK interests through their particular strengths and capabilities. With delicate balancing, these can avoid integrating independent actors into an overtly interfering state system and even extend a strong mandate for actors to expand their autonomy.

Existing Points of Connectivity Between Government and Soft Power

89. There are, already, a number of established touchpoints for the sector across Whitehall, which are adept at fostering efficient and effective, mutually beneficial collaborative projects between the sector and Government. BSI, for example, has strong linkages across the Whitehall network. Working with the Department of Business and Trade (DBT), BSI has been able to collaborate on the use of standards around trade policy and the building of better trade opportunities. Meanwhile, working with the Foreign, Commonwealth and Development Office (FCDO) and its Regulatory Diplomacy Programme, it has worked to use standards as a lever to promote UK best practice around the world and to shape the international rules-based and standards organisations.¹⁰²
90. Similarly, UK Sport has had the opportunity to engage in several Memoranda of Understanding with other nations, which are key tools to building and strengthening bilateral relationships.¹⁰³ Many of these agreements have produced strong strategic soft power benefits such as with Japan, where knowledge transfer opportunities and exchanges between the nations' sporting organisations were encouraged by both nations leading up to the Tokyo 2020 Olympic and Paralympic Games. UK Sport also regularly worked with the former Department for International Trade, and will continue to work with the Department for Business and Trade, 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.¹⁰⁴

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91. The linkages between individual soft power actors and individual departments are also often strong. A Science Museum Group representative outlined that there was a strong level of understanding within particular pockets of Whitehall - not all - regarding the museum's ambitions, projects and outcomes. For example, the Department for Digital, Culture, Media and Sport team that has oversight over Government relations with UK museums was identified as fostering fantastic connectivity and communication with the sector and holding an evidenced backlog of listening to the institutions that sit within its jurisdiction. The GREAT campaign's recent cross-Government capability review, which focuses on leveraging soft power practically in order to generate strong narratives around the UK, is also an encouraging example of critical Government engagement with the sector.
92. There are also individual initiatives which have worked effectively in supporting more collaborative relations between Whitehall and the soft power sector. The now discontinued Culture Diary, which operated as an intermediary platform between the culture sector and the Government, at times provided 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, and while ultimately abandoned, provided clear and valuable direction and opportunities for collaboration between Whitehall and the soft power sector.
93. However, while there are clear strengths in the existing system and ideas and initiatives that provide a strong foundation for future engagement, which should rightly be commended, these tend to be relatively ad-hoc. They are reliant on the enthusiasm and energy of individuals in Whitehall and individual soft power actors, rather than being embedded in clear systems and processes to support collaboration. It is clear that building upon these foundations, there is a need to further develop opportunities for connectivity between Government and the soft power sector and we look now to which areas, collectively, the Government and the soft power sector can and should look to prioritise improved connectivity in order to most effectively harness the potential of the UK's soft power sector.
94. Before doing so, it is critical to note that any potential enhancements must avoid the instrumentalisation of civil society and industry actors by Government and involve actors in the co-creation and implementation of any future actions. The value of the UK's soft power assets comes in large part from their independence and freedom from Government policy and overt instrumentalisation of soft power by the state can reduce the credibility and trust of the associated activities or outputs.¹⁰⁵ It is a difficult balancing act and there is, therefore, a need for a soft power strategy framework that can successfully harness UK-wide resources for maximum impact in support of national interest while maintaining independent organisations' autonomy.

Opportunities for Closer Collaboration

Long-Term Strategic Thinking Around Soft Power

95. First and foremost, despite the clear ambition set out in both iterations of the Integrated Review for an effective soft power strategy, there remains a lack of long-term strategic vision for the sector set both by the sector itself and by the Government.
96. While the sector appreciates Government efforts to collaborate with soft power institutions around key domestic and international moments, these tend to be last minute afterthoughts, rather than the central component of Government strategic thinking that they can, and should, be. For example, the UK Soft Power Group was given the opportunity to liaise and coordinate directly with the Government in 2021 on its COP26 activity overview, but the last minute nature of the ask, and the lack of mechanisms within Government to harness the collective effort to maximise impact, limited the impact of the engagement.
97. 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 former Department of International Trade on 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.¹⁰⁶ Gaps in long-term strategic thinking about the role of soft power are also evidenced by the lack of engagement with soft power institutions regarding any meetings and opportunities taking place ahead of the 2023 G7 or G20 summits.
98. The absence of a shared strategic vision also makes it a challenge for organisations in the sector to understand how their organisations can best play into the UK's wider soft power projection and instigate collaboration. This was a challenge highlighted particularly by representatives from the British Horseracing Authority and The Jockey Club in the research for this paper. Horseracing 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. The British Horseracing Authority highlighted that this latency is increasingly being noted by

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international investors, who are concerned about the UK's perceived lack of interest in the racing industry.¹⁰⁷

99. There is much to be learnt from our allies, such as Australia, in this regard. Effective since 2015, Australia's Sports Diplomacy strategy highlights and aims to harness the potential tourism and trade benefits, and more holistically, benefits to its soft power and international reputation, from Australia's sporting activities. From this strategy has come opportunities such as the UK-Australia sports dialogue in February 2022, hosted by the UK Academy of Sport, which has encouraged discussion around the role of, and how to advance, sports diplomacy in the UK-Australian relationship.
100. More strategic thinking, including around how the individual soft power sectors can play into Government soft power and diplomatic goals and policy objectives that can deliver lasting impacts will enable the sector to understand where they are best placed to support Government objectives. When done delicately, with the agreement of all stakeholders, and with appropriate funding and incentives in place, such strategies would effectively translate Government vision for the UK's role in the world into action.

Understanding of Priority Government Objectives

101. In the longer-term, it is clear more strategic thinking is needed by both the sector and Government together to properly harness the benefits of soft power. In the short-term, greater clarity and agreement would be welcome on the key markets and priority themes for institutions to focus their collective time and resources. While the Integrated Review and its Refresh identified an overarching vision for the UK's foreign policy, it is not immediately obvious, nor tangibly outlined, how the soft power sector fits into the implementation process or which of the vast number of areas covered in the Review the sector is best placed to support the Government on. Given that for most soft power institutions soft power is secondary to their primary purpose of delivering arts or sport or qualifications etc, being able to prioritise a few key areas and themes around which the soft power sector can strategically target its focus and influence, will help ensure they are able to operate most effectively in support of the UK's international objectives.
102. In the current geopolitical context, soft power organisations also face new risks and challenges. The sector would like to see greater dialogue, mutual support and guidance from the Government regarding international collaboration with priority countries that carry reputational risks. While one of the benefits of soft power institutions is that they can cooperate with nations that the UK Government may struggle to engage with directly, there are risks involved. The Association of British Orchestras, for example, remains uncertain about where to seek guidance from within the Government when it comes to discussing collaborations with potentially controversial nations that have come at the behest of the Government. For example, collaborations with Saudi Arabia, or the UK-Russia Year of Music in 2019/20, have left the orchestral sector feeling unduly

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criticised.¹⁰⁸ Similarly, representatives from the British racing sector outlined how racing - like several other sports - often receives criticism for engaging with and supporting events held in countries such as Saudi Arabia.¹⁰⁹ Increased clarity and communication on the boundaries of such collaboration is therefore essential to avoid reputational faux pas. When interacting with such nations, a comprehensive front - espoused across all levels, from central Government, to devolved administrations, down to the independent organisations - is the most efficient way to avoid confusion, clashing messaging and communication errors within a sensitive landscape.

103. Alongside clear, top level principles on the international priorities for Government, increased Government facilitation of cooperation between soft power institutions and embassies regarding knowledge transfer of on-the-ground understanding would help ensure assets are able to operate effectively across different regions. Creating such channels and providing this clarity would ensure that there is a comprehensive, nationwide understanding of UK stances towards nations that carry reputational risks and the necessary Government support for soft power actors to help guide those interactions without blunder.

Cross-Departmental Communication Within Whitehall

104. The cross-sectoral nature of the UK's soft power assets is, in many ways, one of its strengths. Nonetheless, it also poses challenges, in particular in engaging with the Government. There is a tendency for departments to have a consolidated understanding of the workings of individual soft power institutions within their jurisdiction but a lack of clarity and 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 duties. 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.¹¹⁰ Opportunities should be sought to improve understanding within Government through better connectivity mechanisms across Whitehall, to help prevent such missed opportunities.
105. In turn, gaps in cross-departmental communication within Whitehall, is posing resource challenges for the sector as soft power institutions struggle to keep track of new and available initiatives and funding pots, 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 a Science Museum Group representative in the research for this report, 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.¹¹¹ Addressing this and improving communication between

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departments would therefore ensure soft power organisations are able to make more effective use of available funds and opportunities and improve Government procurement processes by ensuring they are able to attract the best bids.

Understanding of Soft Power within Whitehall

106. In Government, and the UK more broadly, the soft power sector is often seen as amorphous. Reported uncertainty from Whitehall staff on how, where and when to communicate with 'soft power' is understandable when current connectivity between the sector and Government is relatively weak.
107. However, increased Governmental understanding of soft power would be mutually beneficial. For ACCA, for example, it would increase the profile of its vast network of accountancy bodies and staff connections that it holds around the world. It would also strengthen it as a soft power asset for the UK and increase understanding of how the Government can best utilise it during important soft-power-projecting events, such as international diplomatic visits, or if in need of expert consultations on areas such as taxation and skills.¹¹² Similarly, BSI has highlighted that a more comprehensive understanding across Government - outside of the FCDO - of its additional functions as a convening and advocacy body, and its broad network of diplomatic connections into international Governments, would promote general awareness of its position as a multifaceted part of the Government armoury of soft power assets.¹¹³
108. Stronger Government understanding of what assets are available and operating, where their contacts are in Whitehall, and how to contact them, will enable those in Whitehall to get a quicker, smoother response from the soft power sector when it comes to requesting involvement and cooperation in upcoming events and vice versa.

Prioritisation of Soft Power within Whitehall

109. With this increased understanding of the soft power sector, will also come, it is hoped, a higher level of prioritisation of the UK's soft power. There are concerns within the soft power sector that, particularly since the merger of the Foreign and Commonwealth Office and the Department of International Development, soft power is failing to gain the support and traction it needs. Members from across the soft power sector have suggested that as the Foreign, Commonwealth and Development Office is still in the process of organising itself, challenges such as its very high staff turnover and proliferation of priorities and objectives have worsened communication channels between civil servants and soft power institutions. In particular, an ACCA representative identified that the ongoing disruption caused by the merger means that they often struggle to find the right point of contact within the central Government when sharing or planning possible initiatives, undermining the potential for collaboration.¹¹⁴

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110. This challenge has understandably been compounded by the need for the FCDO to prioritise addressing Russia's invasion of Ukraine, with soft power institutions now struggling to receive timely responses on challenges or opportunities outside of Ukraine. As a result, and as highlighted by a Wilton Park representative, many have found that liaising with UK postings abroad instead is more time-efficient, with initiatives then being fed back to FCDO in due course.¹¹⁵
111. Although this may be practical, it is not in itself a long-term solution and it is clear that a 'home' for soft power within Government is needed to enable the sector to feed into strategy-making and collaborate in a timely and effective manner alongside Government. Bolstering soft power within ministerial portfolios would ensure that soft power liaison and relations remain prioritised within the official duties of Whitehall staff, even as Government attention continues to be diverted by other pressing priorities. The team supporting the Minister should be mandated to effectively facilitate engagement with stakeholders across HMG and external soft power actors and provide guidance to soft power institutions on opportunities for the sector to contribute to Government priorities.
112. A Strategic Relationship Management System (SRM), like the mechanism that was operating in the former Department for International Trade, and is now running – restructured – in DBT, could also prove a useful model to provide soft power institutions with individual points of contact around the Government system, and to ensure soft power remains prioritised within the official duties of Whitehall staff. These initiatives could ensure that soft power considerations are able to more effectively gain traction across Whitehall and instigate the maintenance of the critical connectivity channels that the UKSPG consider a necessity for a healthier soft power environment.

Collaborating with Decentralised Soft Power Initiatives

113. Decentralised administrations' and cities' soft power initiatives are an important route to ensuring the success of the UK's soft power. However, where their policies and priorities diverge from those of central Government, it can cause jurisdictional friction. For example, both Wales' soft power Action Plan and Scotland's 'Steadfastly European, Scotland's Past, Present, Future' paper, outline the respective nations' European credentials and emphasise the instability caused by the UK's withdrawal from the EU.¹¹⁶ While this misalignment with the UK Government's approach to messaging around the future UK-EU relationship creates opportunities for these nations to independently work with the EU, it also undermines wider UK strategy. 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.

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114. A lack of connectivity with Whitehall can also limit decentralised initiatives' value and input into central Government agendas such as Levelling Up, which can, in turn, result in agendas being irreflective of on-the-ground realities and capabilities. Without steady consultation with Westminster officials, expert- and evidence-based knowledge that is habitual to city regional administrations is overlooked for incorporation within priority agendas.
115. At the same time, in some settings, close association with a national brand can undermine soft power impact. For example, a National Theatre Wales representative emphasised the damage that Brexit has inflicted on the UK's international brand over the past 7 years, and the decreased appetite from international contemporaries to associate with the UK brand. Instead, it finds it has the most success in partnership building if it is able to brand its export offer as Welsh, and decouple from the UK and its post-Brexit reputation.¹¹⁷
116. It is, therefore, a careful balancing act to ensure that devolved administrations and initiatives enable effective collaboration between central Government and wider soft power initiatives, while both ensuring their independence and their compatibility with central Government initiatives. 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. At the same time, a number of UK cities hold a strong global brand largely based on soft power assets, including football teams, festivals and universities. A recalibration of central Government's relationship with UK cities that emphasises closer strategic alignment and collaboration could serve to improve the wider UK's reputational positioning and global branding by drawing on cities' soft power halo effects and translating them into a stronger nation-wide projection of soft power.
117. Extending Government support - from targeted financial resourcing to making available diplomatic networks to city and regional initiatives - can 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. For example, the Event Research Programme - a project run by Liverpool City Council to independently manage and stage the first mass gatherings without social distancing since the start of the pandemic - created global reach, and positioned Liverpool as an open, confident and innovative city on the world stage and boosted the UK's international reputation.¹¹⁸ Moreover, city-led events like the Edinburgh Fringe Festival 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.¹¹⁹ Better communication and partnership channels, strategic investment and knowledge-sharing opportunities between Westminster and UK cities

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and regions would help nurture the full soft power potential based across the nations, and help deliver on its international Global Britain agenda.

118. 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.

Conclusions and Recommendations: ‘Conceiving a Holistic Whole-of-UK and Whole-of-Government Framework’

119. The UK soft power sector is rich and diverse, bringing clear and direct benefits for the UK internationally and strengthening our 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 our soft power resources to best compete with both allies and strategic rivals and to leverage soft power in support of the UK’s prosperity, security and influence.
120. At its best, the UK Government’s active engagement and leadership has been crucial in developing and sustaining a strategic framework. While the independence and freedom of soft power actors 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.
121. There is a long-term strategic benefit for the UK in a dedicated soft power framework, catalysing greater alignment and coordination between public and independent actors, while fostering a nurturing environment in which assets can independently grow and innovate. The aim should be to develop an ecosystem which is strategically close, operationally autonomous and highly collaborative.
122. The UK Soft Power Group offers this report and its recommendations for discussion, in order to support the development of a new strategic long-term approach to soft power, building on achievements so far while taking a fresh look at how to maximise potential in challenging circumstances.
123. Our recommendations are:
 1. **Establish a new Government-soft power engagement forum to aid connectivity and strategic thinking between Whitehall, devolved administrations and independent soft power actors.**
124. Creating a Government-soft power engagement forum would help provide critical connectivity between the soft power sector and the Government through focused discussion between all stakeholders. The establishment of a regular feedback loop between Government and the soft power sector would ensure greater soft power sector presence and engagement in planning strategic long-term UK-wide and regional visions, agendas and strategies. This includes enhancing soft power actors’ understanding of priority focuses for Government and the role they can play in advancing them.
125. We recommend that the forum should drive strategy through an annual Ministerially-chaired conference, convening representatives from across the soft power sector.

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Ministerial oversight would provide the necessary top-level endorsement for effective Government-soft power relations and help ensure effective follow up across Government. The Ministerial forum should be supported by a working-level steering group meeting more frequently, which would include Whitehall, devolved administration, city and regional and independent soft power stakeholders. The steering group should seek to provide focused, tangible strategy-led objectives to guide discussion at the Ministerial event. The British Foreign Policy Group and the British Council, as co-convenors of the UK Soft Power Group, are ready to assist in a convening role, assuming clear Government endorsement and commitment to the forum.

126. We believe that there would be multiple potential benefits in a structured coordination mechanism. For example, soft power players would have the opportunity to acquaint Ministers and officials with the scope and impact of their activities, in order to increase visibility across Government of the contribution soft power can make to national objectives. A forum including representation and input from devolved national, regional and city administrations would enhance UK-wide connectivity and provide a better evidence base for the value of assets that are geographically spread. It could also provide an impetus to the co-creation of mutually beneficial sectoral soft power strategies. At the same time, it would provide an opportunity for the Government to ensure that soft power players understand the nuances of UK foreign policy, particularly in respect to countries with which relations are often challenging.

2. Ensure that the Minister responsible for soft power is recognised as the cross-Government Soft Power Champion, supported by a small team empowered to make targeted strategic interventions across Whitehall and beyond.

127. There has long been a Minister in the FCDO (previously FCO) with responsibility for cultural affairs and soft power. We recommend that the Minister, alongside their other responsibilities, be designated as the cross-Government Soft Power Champion. This would instantly enhance the status of soft power within Government, convey a strong message of support to the sector and beyond, and provide a recognisable central “docking point” for high level Government engagement for the sector’s members, whichever sponsoring departments they engage with on other matters.
128. With this enhanced status, the Minister would be able to convey the collective ‘voice’ of UK soft power to the Government and vice versa. The supporting team would be able to ensure that soft power considerations are promoted in relevant Whitehall discussions, as well as hold institutional memory of ‘what works’, ensuring critical knowledge and expertise regarding soft power are maintained.
129. The team’s duties could also usefully include providing light-touch ‘account management’ for soft power players (see below), facilitating engagement with overseas Posts, and coordinating a calendar of forthcoming events, priorities and initiatives to

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provide soft power actors with more foresight of upcoming opportunities to collectively advance the UK's strategic interests.

3. Introduce a light-touch Strategic Relationship Management System (SRM)-style account management system for soft power bodies to enhance connectivity across Whitehall.

130. The SRM system that operated out of the former Department for International Trade, and is in the process of restructuring within DBT, is a highly effective model in ensuring that key players in UK trade and investment priority areas are able to make the right contacts across Whitehall in order to do business effectively and at the same time contribute to UK priorities. We propose a similar light-touch approach for soft power actors, which could improve connectivity within Government and ensure that opportunities for collaboration are not missed.

131. A dedicated soft power SRM would provide soft power institutions with individual points of contact in Government who are familiar with their role and contribution and who would be able to connect them with colleagues across Whitehall to address specific needs. In addition, this would facilitate better visibility of soft power opportunities across Whitehall. The SRM function would logically sit within the small team supporting the Soft Power Minister's role as the cross-Whitehall Soft Power Champion.

4. Agree on planning horizons, resources and funding mechanisms, between Government and soft power actors to maximise their contribution to the UK's international objectives.

132. The agreement of shared priorities, planning horizons and optimal resourcing and funding mechanisms is essential in properly maximising the longer-term benefits of collaboration between Government and the soft power sector.

133. More strategic thinking and open communication between Government and the soft power sector regarding joint priorities and planning horizons would promote 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 increase clarity on how soft power can best support Government objectives.

134. Improved connectivity would also enable open communication on improving resourcing and funding mechanisms to ensure optimal impacts. For example, UK Soft Power Group members have indicated that if the Government were to replace single-year funding models with the offer of multi-year funding initiatives, soft power actors would be able 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.

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135. Moreover, group members believe that Grant-in-Aid funding is often preferable to smaller initiatives like seed-funding pots. The flexibility afforded by this model of funding ensures that institutions are able to function more effectively, using their internal expertise to direct funds to the functions that produce the most impact. This model also results in institutions being better able to flexibly deploy resources to contribute to Government initiatives when asked, as well as to offer advice when specialist expertise is needed.

5. Create light-touch mechanisms to increase connectivity between soft power actors and overseas Posts.

136. The UK's network of overseas Posts remains underutilised in the soft power sphere. Soft power actors require a deeper understanding of overseas Posts - not only in identifying key contact points but also in understanding what knowledge and support is 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 actors, in the form of education on how soft power 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.

137. 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 actors, complete with strong mechanisms for communication and engagement. This would help both soft power actors to be better equipped with the understanding, contacts and strategic capacity to conceive and carry out collaborative engagement, and overseas Posts to better understand what tangible benefits harnessing soft power can bring. There is an opportunity to trial these mechanisms in a select few overseas missions, in some key markets, in order to iron out best practice. The proposed SRM team could play a highly effective role in building this connectivity.

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