

Brand Finance®



# Global Soft Power Index 2022

*The world's most comprehensive research study  
on perceptions of nation brands*



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# About Brand Finance

**Brand Finance is the world's leading brand valuation and strategy consultancy.**

*We bridge the gap between marketing and finance*

Brand Finance was set up in 1996 with the aim of 'bridging the gap between marketing and finance'. For over 25 years, we have helped companies and organisations of all types to connect their brands to the bottom line.

*We pride ourselves on technical credibility*

Brand Finance is a chartered accountancy firm regulated by the Institute of Chartered Accountants in England and Wales, and the first brand valuation consultancy to join the International Valuation Standards Council. Our experts helped craft the internationally recognised standards on Brand Valuation – ISO 10668 and Brand Evaluation – ISO 20671.

*We quantify the financial value of brands*

We put 5,000 of the world's biggest brands to the test every year. Ranking brands across all sectors and countries, we publish nearly 100 reports annually.

*We advise governments on how to boost their nation brands*

Brand Finance has been conducting an annual Nation Brands study on the world's most valuable and strongest nation brands for over 15 years. It has provided key benchmarks for diplomats, tourism boards, trade agencies, nation brand consultants and managers. The Global Soft Power Index expands on that

methodology to provide an all-round view of perceptions of nation brands. Understanding those perceptions is key for national, regional, city, and corporate brands to achieve success internationally, allowing to identify strengths and weaknesses and to improve growth strategies going forward. The stronger the nation's soft power, the greater its ability to attract investments and market its products and services.

*We offer a unique combination of expertise*

Our teams have experience across a wide range of disciplines from marketing and market research, to brand strategy and visual identity, to tax and accounting, to public diplomacy and crisis communications. We understand the importance of sharing a brand's story to reach business objectives.



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The Place Brand Observer

The Print Centre

Savanta Group Limited

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# Global Soft Power Index 2022

The world's top 120 soft power nations, scored out of 100



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 <b>101</b> ↓ 97 <b>TANZANIA</b> Score <b>29.1</b> +1.6	 <b>102</b> ↓ 95 <b>NEPAL</b> Score <b>29.1</b> +1.1	 <b>103</b> ↓ 83 <b>ETHIOPIA</b> Score <b>29.1</b> -0.1	 <b>104</b> NEW <b>ALBANIA</b> Score <b>29.1</b> -	 <b>105</b> ↓ 78 <b>BANGLADESH</b> Score <b>29.0</b> -1.0
 <b>106</b> NEW <b>LAOS</b> Score <b>28.9</b> -	 <b>107</b> ↓ 87 <b>ZAMBIA</b> Score <b>28.8</b> +0.3	 <b>108</b> ↓ 90 <b>MYANMAR</b> Score <b>28.6</b> 0.0	 <b>109</b> NEW <b>BOTSWANA</b> Score <b>28.5</b> -	 <b>110</b> ↓ 98 <b>SENEGAL</b> Score <b>28.4</b> +0.9
 <b>111</b> ↓ 101 <b>GUATEMALA</b> Score <b>28.2</b> +2.1	 <b>112</b> ↓ 88 <b>CAMEROON</b> Score <b>27.9</b> -0.7	 <b>113</b> ↓ 99 <b>TURKMENISTAN</b> Score <b>27.7</b> +0.4	 <b>114</b> ↓ 100 <b>ANGOLA</b> Score <b>27.7</b> +0.8	 <b>115</b> ↓ 94 <b>UGANDA</b> Score <b>27.3</b> -0.7
 <b>116</b> ↓ 105 <b>DEM. REP. CONGO</b> Score <b>27.1</b> +1.9	 <b>117</b> ↓ 104 <b>MOZAMBIQUE</b> Score <b>26.5</b> +1.1	 <b>118</b> ↓ 102 <b>HONDURAS</b> Score <b>26.5</b> +0.5	 <b>119</b> NEW <b>SUDAN</b> Score <b>26.0</b> -	 <b>120</b> ↓ 103 <b>TRINIDAD AND TOBAGO</b> Score <b>25.3</b> -0.3

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# Request your own Soft Power Report

A Soft Power Report provides a full breakdown of your nation brand's performance in all metrics of the Global Soft Power Index, both on a global level and on a country by country basis. You also gain access to our interactive dashboard where you can explore the scores of all 120 nation brands in the study.

Each report includes expert recommendations for improving your nation brand perceptions and offers a cost-effective way to gaining a better understanding of your position against peers.

Visit [www.brandfinance.com/softpower](http://www.brandfinance.com/softpower) or email [softpower@brandfinance.com](mailto:softpower@brandfinance.com)



Insight



Strategy



Benchmarking



Education



Communication



Understanding

# Benefits



**David Haigh**  
Chairman and CEO,  
Brand Finance Plc

# Introduction

Brand Finance Plc has been measuring the strength and value of nation brands since 2004. In 2019, we decided to commission original research to better understand the Familiarity, Reputation, and Influence of nations and the extent to which soft power impacts these measures – the Global Soft Power Index.

Brand Finance defines soft power as “a nation’s ability to influence the preferences and behaviours of various actors in the international arena (states, corporations, communities, publics etc.) through attraction or persuasion rather than coercion”.

We also measure 7 ‘pillars’ contributing to the favourable or unfavourable perception of the nation brands in our study. The pillar research explores various aspects of Business & Trade, Governance, International Relations, Culture & Heritage, Media & Communication, Education & Science, and People & Values.

Soft power works in the short, medium, and long term to help governments with various policy objectives and initiatives. Historically, soft power developed spontaneously. But increasingly, countries see soft power as an important element of statecraft, and a number of countries, from Ireland to China, explicitly seek to develop their soft power as an instrument of foreign and trade policy.

The third wave of our global research provides deep insight into the views

of 100,000 stakeholders on 120 nation brands. This report summarises the results of fieldwork conducted in the autumn of 2021, and the opinions of various experts on aspects of soft power. The majority of these perceptions hold true today.

However, as a result of Russia’s invasion of Ukraine we anticipate significant changes to underlying stakeholder opinions of those two nations, and have commissioned a specific additional piece of research to explore this change to the three-year trend data. At the time of writing, this ancillary research is still in field and has not been included in this report. We anticipate being able to share its findings at the Global Soft Power Summit 2022.

According to Professor Joseph Nye, power is “the ability to influence the behaviour of others to get the outcomes you want”; you can coerce them with military threats (hard power); you can induce them with economic pressures (also hard power); or you can attract and co-opt them to want what you want (soft power).

The current tragic events in Ukraine sadly illustrate all three types of power. Russia seems to believe military hard power alone will achieve its objectives, but is being thwarted by heroic resistance from a much weaker military force. The rest of the world believes economic hard power will make Russia change course and withdraw, and it may eventually be right. Meanwhile,

Ukraine is providing a masterclass in the use of soft power to galvanise global opinion, using conventional and social media to win the argument. Political pundits say that the only nation with the ability to stop the conflict is now China, by using its soft power leverage on Russia.

I sincerely hope that soft power does provide the solution to this global disaster. Our 21<sup>st</sup> century world needs multi-lateral co-operation, not a spiral down into the failed hard power politics experienced during most of the 19<sup>th</sup> and 20<sup>th</sup> centuries.

Demonstrating our belief in soft power, we are actively backing an initiative called Brand Solidarity. Brand Solidarity has been formed to bring brands together to express a chorus of support for the people of Ukraine and contribute to the push for peace.

Participating brands from around the globe are displaying the Brand Solidarity logo on any marketing items (from emails to websites, from advertising to packaging). All brands of any type and size are welcome to participate. For more information, please contact us or email [marcel@brandguru.org](mailto:marcel@brandguru.org).

I am honoured to have been invited to become a Patron of Brand Solidarity alongside Anthea Turner (TV Presenter); Brent Hoberman (Chair, Founders Forum); Sir John Hegarty (Founder and Creative Director, The Garage Soho); Simon Woodroffe (Founder, YO! Company); Sophie Devonshire (Author and CEO, The Marketing Society), and Trevor Beattie (Filmmaker), among others.

We look forward to many more brands and organisations joining Brand Solidarity, and hope that ultimately soft power will prevail.



**BRAND SOLIDARITY™**



**Dr Paul Temporal**  
Associate Fellow,  
Saïd Business School,  
University of Oxford

## Foreword

This year, the world's largest study of soft power provides greater in-depth information and analysis, with an increase in survey numbers to over 100,000 respondents rating 120 nation brands. As last year, measures of soft power are expressed across three main indicators – familiarity, reputation, and influence – and based on the seven soft-power ‘pillars’ of Business and Trade; Governance; International Relations; Culture and Heritage; Media and Communication; Education and Science; and People and Values. And, as in 2021, the survey of public opinion on nations’ handling of the COVID-19 pandemic features as an extra, separate dimension.

The dynamics of the COVID-19 situation have had a substantial impact on the rankings. The US now returns to the top of the 2022 overall index with significant improvements in all pillars. Among these, Governance and COVID-19 Response scores are high and there is little doubt that the administration change from Trump to Biden accounts for much of the positive rebound. On the COVID-19 pillar itself, China shows much improvement, as do European countries such as Italy and Spain, with Switzerland scoring highest. By contrast, Australia and New Zealand see declines as COVID isolation policies adversely affect international perceptions.

The scores from 2021 and 2022 on this dimension tell us, firstly, that soft power is surprisingly volatile, needing both short- and long-term attention due to fast-changing challenges and the development of solutions. And secondly, it reminds us that soft power is complex. Positive activity in one dimension can be undermined by conflicting activity in another, as well as by external forces.

15 new countries are included in this year's Index; they are mainly smaller by population, and none enters the top 50. Maldives impresses as the highest ranked at 52<sup>nd</sup>. This tiny group of islands is the number one ‘great place to visit’ but also ranks highly on other metrics, such as ‘good relations with other countries’, and ‘protecting the environment’. With this in mind, it is likely that in future research, climate change activity and performance will assume greater importance.

The small size of a nation is not a barrier to occupying a strong position in the soft power ranking, as demonstrated by Switzerland, UAE, and other nations that have created positive overall brand perceptions, and worked hard on building their national brand images, mainly through soft power.

Nation branding is a demanding exercise, and it is easy to fall into the trap of short-term, media-driven positioning soundbites. The GSPI underscores, clarifies and simplifies ways in which soft power can add value to nation branding. It provides a gateway through which those who work in this area can chart out strategies for improvement by facilitating the management of public opinion and global perceptions based on real, competitive data.

Overall, the report features in-depth analysis of individual countries, regional highlights, and performances on all pillars and statements. The comparative breakdowns and interrogative data opportunities mean that the report is a must-read for anyone responsible for the development of nation and location brand strategies, economic and social policies, and international relationships.





## How did we survey perceptions of soft power?

- Defining soft power
- Consulting the experts
- The 7 Soft Power Pillars
- Constructing the Index
- The General Public survey
- Conducting over 100,000 interviews across more than 100 nations

01

Methodology



# Definitions of Soft Power

## What is soft power?

World leaders, global corporate brands, civil society, entrepreneurs, academics, journalists and thinkers are endlessly attempting to make sense of the concept of power. Is it a dominant force exerted upon smaller entities? Is it the art of coaxing another around to your way of thinking?

When we look at nations around the world and their leadership through the lens of power, there are a variety of terms that can be applied to government policies and overall national influence: hard power, soft power, sticky power, old power, and new power.

The concept of soft power was first introduced by Joseph Nye in 1990 who argued that there is an alternative method of foreign policy for states to win the support of others; rather than the traditional hard power method, which involves using military and economic means as the primary method of achieving its goals.

Power is, not simply the “the ability or right to control people or things”, but crucially it is also the possession of influence over others and the “ability to act or produce an effect”. Ultimately, soft power is the ability to convert states rather than coerce them, or simply “getting others to want what you want”, which is achieved by proving your shared values and norms.

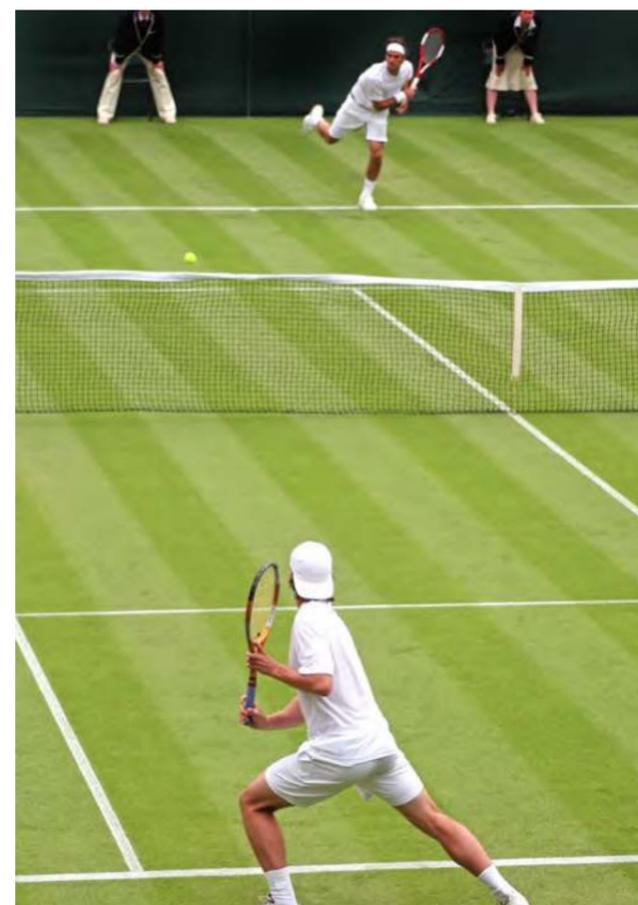
This emphasis may have been relevant in the past, when states were reliant on taxable revenue and large armies were necessary to win wars – both of which are dependent on the size of the state’s population. This is no longer the case, as “the definition of power is losing its emphasis on military force” and “technology, education and economic growth are becoming more significant in international power”.

The strength of a nation in bringing others on-side can be said to rest broadly upon its culture, economy, political values, foreign policies, quality of life, robust academic institutions, and rule of law.

By proving the development of a nation’s domestic strength, it is able to further its influence and legitimise its role as an international player. Socialising accepted norms and values is also a large part of a nation’s effort to build its soft power reserve – a bank of influence created to affect the foreign policy of other states. This is because states, like humans, are more likely to trust those with whom they share common ideals.

It is with this in mind that we have carved our in-house definition of soft power:

A nation’s ability to influence the preferences and behaviours of various actors in the international arena (states, corporations, communities, publics etc.) through attraction or persuasion rather than coercion.



## Expert consultation

We started with a deep dive review of existing soft power surveys, indices, and frameworks, followed by a series of expert consultation interviews with soft power practitioners. We have undertaken three rounds of expert consultations over the last three years, conducting qualitative interviews across 18 countries and 9 categories: Academics; Corporates; Diplomats & Politicians; Lawyers; Journalists; Nation Brand Consultants & Managers; Entrepreneurs; Artists & Sportspeople; and Think-Tank Analysts. The purpose of the expert consultation and perception audit was to establish how soft power is viewed by its key stakeholders. .

Following this soft power deep dive, we were able to build our own definition of soft power, carve out our 7 Soft Power Pillars and then form the building blocks of soft power and our ultimate Index structure.

**Definitions, definitions**

The concept of soft power has undergone a critical analysis by a wide range of academics, journalists, think tanks, politicians, diplomats, and consultancies. By virtue of that, there are differing definitions of soft power and it is easy to fall into the trap of comparing apples with oranges. We started our analysis by clearly defining and conceptualising soft power to avoid any confusion and to ensure relevance of our study to a range of stakeholders.



**Country? Nation? State?**

Part of the confusion comes from using different terms for the actors that exercise soft power on the international stage. We have decided to refer to 'nations' rather than 'countries' (geographical term) or 'states' (political term). 'Nation' encompasses both the government and the population of a country.

**The times they are a-changin'**

Most research on soft power has centred on developed nations and almost equated soft power with liberal values. Such understanding of soft power leads to a very narrow account of what constitutes 'attraction', especially in times marked by change. With our study being driven by an analysis of soft power influence of a broad range of nations, and conducting the survey on both General Public and Specialist Audiences samples in all corners of the world, we aimed to account for cultural differences and differing views.

**Additional COVID metric**

2020 and 2021 were two years like no other, putting the nations of the world to the test as they fought to negotiate the fallout and devastating repercussions of the COVID-19 pandemic. No nation was free from the pandemic turmoil and all nation brands have been impacted. Therefore, we are including a special metric in the Global Soft Power Index to reflect this. Respondents were asked to rate how they perceived nations to have handled the COVID-19 pandemic and were asked to rate the nations' efforts in terms of supporting economic recovery, protecting the health and wellbeing of citizens - including providing vaccinations, as well as helping other countries manage and recover from COVID-19.



**Hard or soft power?**

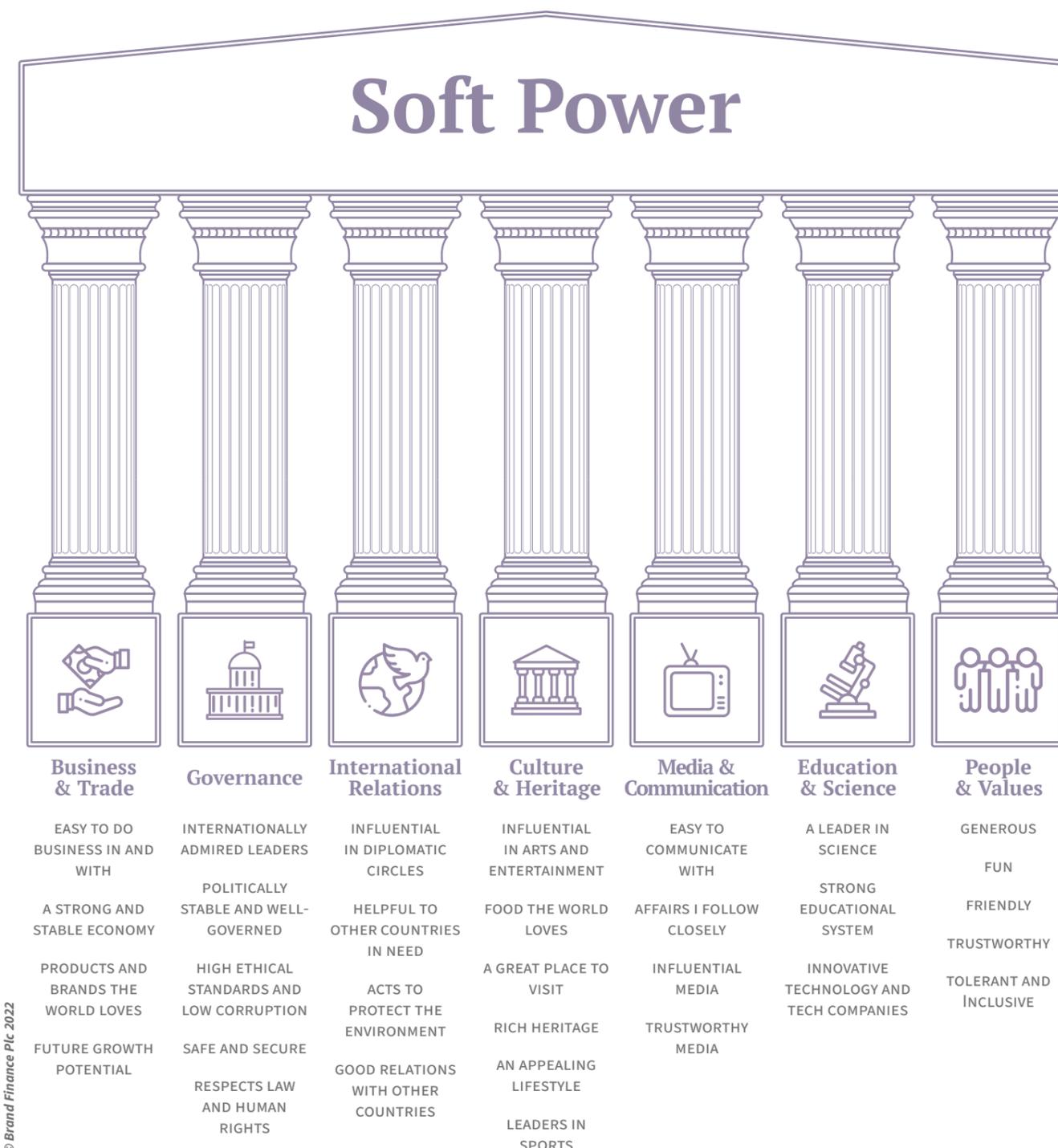
As part of our analysis, we conceptualised hard power alongside soft power. It is impossible to talk about one without touching on the other. Although building up hard power capabilities is inevitable, nations should pay more attention to soft power and make it their preferred tool of foreign policy.

**Soft power rests on several pillars**

Soft power is derived and exercised in a variety of ways. We have divided the building blocks of soft power into 7 key pillars: Business & Trade, Governance, International Relations, Culture & Heritage, Media & Communication, Education & Science, and People & Values.

**Perceptions of soft power**

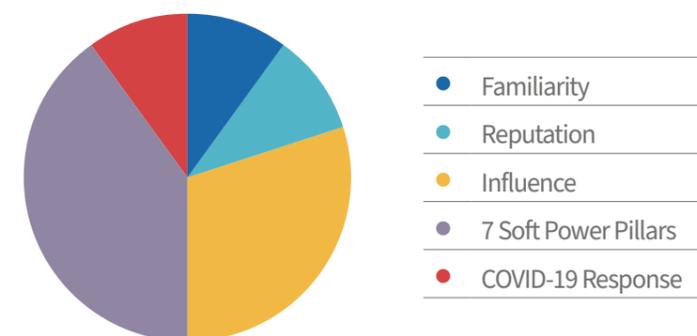
In measuring soft power, we surveyed the sentiment of general publics and specialist audiences to gauge what key stakeholders thought about the soft power potential of nations in the sample.

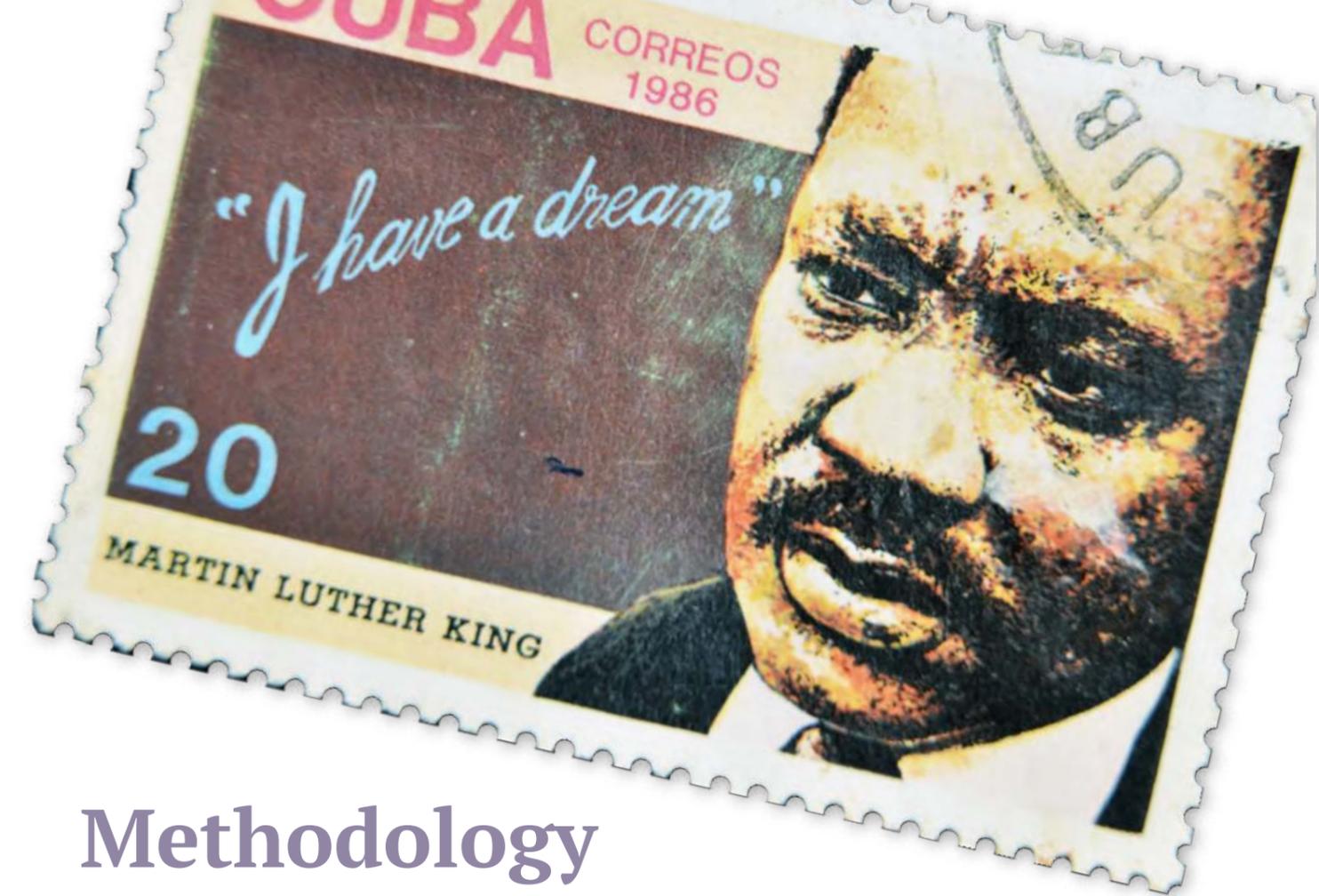


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**Global Soft Power Index Structure**





## Methodology

### How the Index is constructed

The Global Soft Power Index is based on the most comprehensive and wide-ranging research programme of its kind, with responses gathered from over 100,000 people across more than 100 countries, surveying perceptions of soft power of 120 nations from around the world.

In previous waves, two surveys were conducted:

- + General Public: a survey of public opinion covering residents of over 100 countries representing all continents and regions of the world
- + Specialist Audiences: the views of global decision-makers and influencers – representing categories identified as likely targets and conduits for soft power: business leaders, market analysts, politicians, academics, think-tanks and NGOs, and journalists

With both surveys yielding similar results, it was decided to focus on the General Public sample for 2022, enabling us to increase the sample size significantly, and in particular the robustness of results within individual fieldwork markets. Thus, the 2022 Index is based solely on perceptions among the General Public.

The Global Soft Power Index incorporates a broad range of measures, which in combination provide a balanced and holistic assessment of nations' presence, reputation, and impact on the world stage. These include:

- + Familiarity: nation brands which people know, and have mental availability of, have greater soft power
- + Influence: the degree to which a nation is seen to have influence in the respondent's country as well as on the world's stage

- + Reputation: is this country deemed to have a strong and positive reputation globally?
- + Performance on the core 7 Soft Power Pillars (Business & Trade, Governance, International Relations, Culture & Heritage, Media & Communication, Education & Science, People & Values)
- + Performance in tackling the COVID-19 pandemic (on three metrics: Economic Recovery, Healthcare & Vaccinations, International Aid).

The weightings given to each measure within the Index were based on a combination of expert opinion, coming from an extensive literature review and expert consultation process, and statistical analysis assessing the degree to which pillar performance correlates with Influence.

### Country coverage in Index

120 nation brands were included in the research programme, including 15 for the first time. Key nations whose global reputations are of greatest interest to Index users and subscribers (e.g. China, US, Brazil) were prioritised as 'Tier 1' (see map overleaf). These 30 Tier 1 countries have larger sample sizes rating them.

### Methodology – General Public

An online survey was conducted of over 101,000 adults aged 18-75, across 101 countries. As such, our sample is representative of the online population of each country. In developing markets with relatively low internet access (below 85% across all age groups), this skews the sample somewhat towards people with higher education, income, and connectivity – but we deem this acceptable, as it is these groups in the population who are most likely to be affected by soft power and have some familiarity with other nations.



### Fieldwork Method

Two fieldwork approaches were employed. Both have been shown to provide good representations of public opinion.

In more developed markets, established online research panels were used. Panel selection and management was conducted by Savanta.

Where online panel coverage is weak, we partnered with Bolt Insight, adopting a relatively new and cutting-edge approach based on buying advertising space via digital marketing exchanges. Such an approach can be applied even to very challenging markets like Iraq and Venezuela.

These 'ad-exchang'e countries are marked with an asterisk (\*).

Previously, fieldwork in these markets was executed by a different company (Qriously), and although very similar results and rankings have been obtained, caution should be employed when comparing precise scores across the two years.

Quotas were applied by age, gender, and (in panel markets) region – in line with the online population profiles of each country.

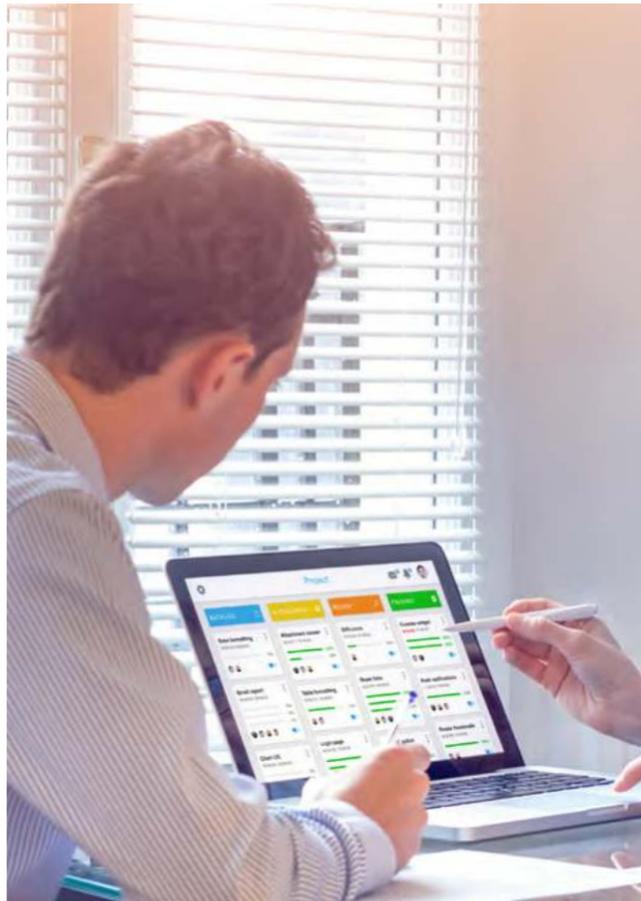
Regional and global total scores were calculated by combining country results using the following weights:

- + 50% – the 'one country one vote' rule, accounting for the sovereignty and differences between the multitude of nations around the world
- + 50% – the size of the online population aged 18-75, with the opinions of the residents of large countries, e.g. China, receiving a much greater weight than those of smaller countries, e.g. Estonia

### Questionnaire

Each respondent was shown a random sub-set of nation brands – drawn from the 120 included and in the Index – and asked about their Familiarity. For countries about which the respondent had some knowledge, we obtained a detailed assessment of Reputation, Influence, and performance on 34 characteristics representing the core 7 Soft Power Pillars, together with perceptions of the nation's COVID-19 Response.

Across each country sample, the 120 nation brands were rotated to ensure that all nations were assessed globally. Surveys were conducted in the major languages of each country, totaling 53 languages globally.



# General Public

## Country Coverage

- Tier 1
- Tier 2 | With Fieldwork
- Tier 2 | No Fieldwork
- Fieldwork Only

Over 101,000 interviews were conducted across the 101 countries surveyed. This included most of the 120 nations included for assessment of the Global Soft Power Index, with the exception of countries which are either very small (e.g. Luxembourg, Iceland) or where online surveys are challenging (e.g. Cuba, Iran).

The sample size in each country was a minimum of 750, with the exception of:

- + Bahrain: 559
- + Cambodia: 422
- + Cameroon: 523
- + Oman: 682
- + Qatar: 730
- + Rwanda: 179

In key markets such as US (n= 3,577), China (n=3,522) and India (n=2,529), larger samples were obtained.

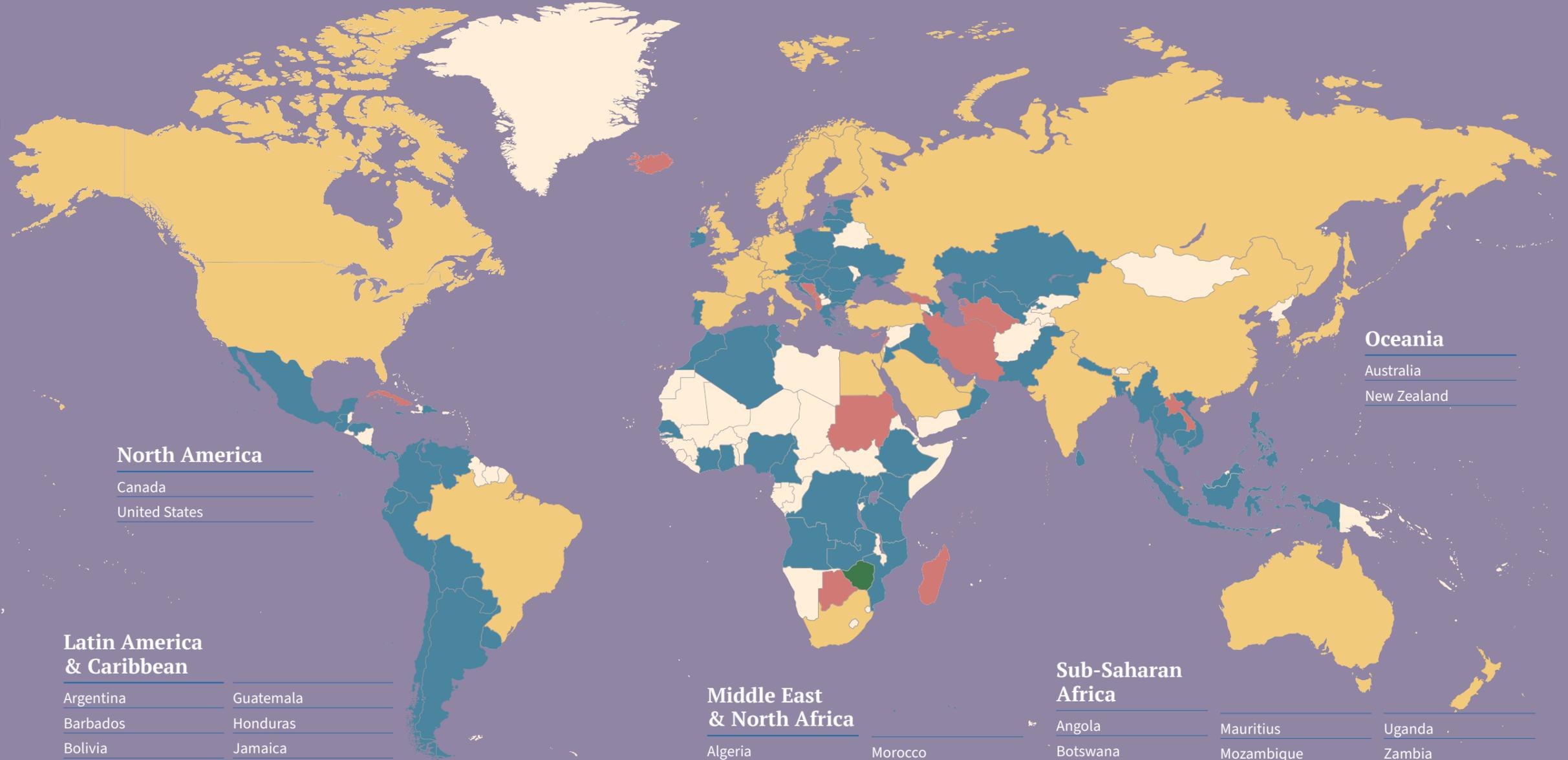
### Europe

Albania	Cyprus
Austria	Czech Republic
Azerbaijan	Denmark
Belgium	Estonia
Bosnia & Herzegovina	Finland
Bulgaria	France
Croatia	Georgia
	Germany

Greece	Malta	Slovakia
Hungary	Montenegro	Spain
Iceland	Norway	Sweden
Ireland	Poland	Switzerland
Italy	Portugal	Turkey
Latvia	Romania	Ukraine
Luxembourg	Russia	United Kingdom
Lithuania	Serbia	

### Asia

Bangladesh	Malaysia	Singapore
Cambodia	Maldives	Sri Lanka
China	Myanmar	Thailand
India	Nepal	Turkmenistan
Indonesia	Pakistan	Uzbekistan
Japan	Philippines	Vietnam
Kazakhstan	Singapore	
Laos	South Korea	



### North America

Canada
United States

### Latin America & Caribbean

Argentina	Guatemala
Barbados	Honduras
Bolivia	Jamaica
Brazil	Mexico
Chile	Panama
Colombia	Paraguay
Costa Rica	Peru
Cuba	Trinidad and Tobago
Dominican Republic	Uruguay
Ecuador	Venezuela

### Middle East & North Africa

Algeria	Morocco
Bahrain	Lebanon
Egypt	Oman
Iran	Qatar
Iraq	Saudi Arabia
Israel	Tunisia
Jordan	United Arab Emirates
Kuwait	

### Sub-Saharan Africa

Angola	Mauritius	Uganda
Botswana	Mozambique	Zambia
Cameroon	Nigeria	Zimbabwe
Côte d'Ivoire	Rwanda	
Dem. Rep. Congo	Senegal	
Ethiopia	Seychelles	
Ghana	South Africa	
Kenya	Sudan	
Madagascar	Tanzania	

### Oceania

Australia
New Zealand



02

## Executive Summary

### What are the highlights from this year's Index?

- USA Bounces Back Better to #1
- UK leapfrogs last year's leader Germany
- China up to its highest position ever
- Italy and Spain resurge after COVID
- Eyes of the world on Russia and Ukraine
- Australia and New Zealand cope with COVID-19 aftermath
- UAE leads in Middle East and North Africa
- Brazil and South Africa - regional ranking leaders
- Global Soft Power Index welcomes 15 nations to 2022 ranking



# Executive Summary

The composition of the Global Soft Power Index 2022 has been influenced by how well nations have managed their recovery from the COVID-19 pandemic just as much as last year's study was impacted by the spread of the virus and its social, political, and economic consequences. The United States of America has bounced back to reclaim the top spot with a score of 70.7 out of 100, followed by the United Kingdom (64.9), Germany (64.6), and China (64.2) at the top of the ranking, as all four nations have been instrumental in lifting the world out of the health crisis through the development of vaccines. Across the ranking, perceptions of nation brands are largely recovering to their pre-pandemic levels, with Italy and Spain – both hit hard in the first wave of COVID-19 – seeing some of the most significant improvements this year. However, as we emerge from one devastating crisis, another is casting a shadow on the future. The world order is being challenged by the deployment

of hard power, and with everyone's eyes fixed on Russia and Ukraine, the need for soft power has never been more pressing.

### USA Bounces Back Better to #1

The USA led the ranking at the start of 2020 but saw a major deterioration of its perceptions among the general public around the world later that year, resulting in a drop to 6<sup>th</sup> position at the start of 2021. A poor track record of its first response to the health crisis under President Donald Trump, a wave of civil unrest against police brutality towards the African American community, and a highly divisive presidential campaign all likely played a role. Now, following a mass vaccination effort and a general shift in international policy under President Joe Biden, the USA has seen the fastest year-on-year improvement across all 120 nation brands ranked in the Global Soft Power Index, recording +14.8 jump from a mere 55.9 in 2021 to 70.7 in 2022 – the highest score ever recorded in the Index.

## Global Soft Power Index Top 20

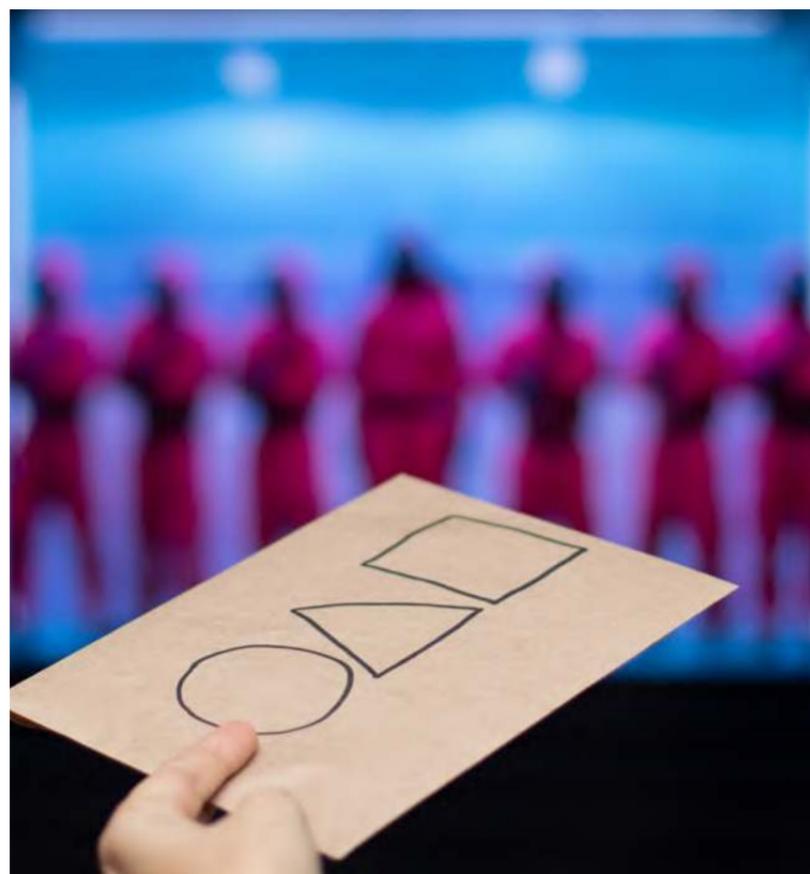
1		↑ 6	United States	70.7	55.9	+14.8	11		↑ 22	Spain	53.0	47.5	+5.6
2		↑ 3	United Kingdom	64.9	57.9	+7.0	12		↓ 11	South Korea	52.9	51.3	+1.6
3		↓ 1	Germany	64.6	62.2	+2.4	13		↓ 10	Australia	52.7	52.2	+0.5
4		↑ 8	China	64.2	54.3	+9.9	14		↓ 9	Sweden	52.3	52.2	+0.1
5		↓ 2	Japan	63.5	60.6	+2.9	15		↑ 17	United Arab Emirates	52.0	48.4	+3.6
6		↑ 7	France	60.6	55.4	+5.3	16		↓ 12	Netherlands	50.6	50.5	+0.1
7		↓ 4	Canada	59.5	57.2	+2.3	17		↓ 14	Norway	49.7	50.1	-0.4
8		↓ 5	Switzerland	56.6	56.3	+0.3	18		↓ 15	Denmark	48.8	49.4	-0.6
9		↑ 13	Russia*	56.1	50.5	+5.5	19		↑ 21	Belgium	48.5	47.7	+0.8
10		↑ 19	Italy	54.7	48.3	+6.4	20		← 20	Singapore	48.5	47.9	+0.6

\* Research conducted in the autumn of 2021 - does not account for the impact of Russia's invasion of Ukraine.

The USA has seen improved ratings in all areas, but the key behind its comeback to the top of the ranking is the tremendous change in its COVID-19 Response score – from bottom of the table last year to a decent 26<sup>th</sup> position globally in 2022. The USA has also recorded a significant boost in Reputation (6<sup>th</sup> – up from 21<sup>st</sup>), Governance (8<sup>th</sup> – up from 20<sup>th</sup>), and People & Values (16<sup>th</sup> – up from 25<sup>th</sup>), all of which can be attributed to significantly more positive perceptions of President Biden’s administration, in contrast to President Trump’s alienating America First approach internationally and divisive politics domestically. Nevertheless, the USA’s scores for ‘safe and secure’ (41<sup>st</sup>) within Governance and ‘friendly’ (62<sup>nd</sup>) among the People & Values statements remain drastically low. Instances of violent gun crime on the one hand and police brutality against African Americans on the other appear to be

affecting perceptions internationally, and are likely to remain an ongoing challenge to the USA’s nation brand until these issues are addressed at the root.

Culture & Heritage is one of the pillars of soft power where the USA has performed consistently well and ranks 1<sup>st</sup> in this year’s study. America is the world’s highest-grossing producer of popular culture, especially in the areas of film, television, and music. As a result of the COVID-19 reopening, perceptions of the USA as being ‘influential in arts and entertainment’ have grown even further, extending its already significant lead over other nation brands. Media platforms such as Netflix, Amazon, Disney, Google, and Apple are continuing to expand globally, enabling access to American culture but also becoming a key delivery channel for local cultural productions – from Squid Games (South Korea) to The Crown (UK).



### UK leapfrogs last year’s leader, Germany

The United Kingdom has rebounded strongly from the tumultuous environment that COVID-19 and Brexit had created in recent years. The country’s Global Soft Power Index score now stands at 64.9, +7.0 year-on-year increase from 57.9 in 2021, which has seen it move up one place from 3<sup>rd</sup> to 2<sup>nd</sup>.

Whilst the long-term impact of the UK’s withdrawal from the European Union is still to be seen, the immediate result has been that of finally introducing some clarity and stability to the political and economic situation following years of conflict and uncertainty.



The UK has seen a rank improvement in the Governance pillar, from 9<sup>th</sup> to 4<sup>th</sup>, particularly attributable to the positive change in the ‘politically stable and well-governed’ metric. Despite scoring well here in this year’s Index, it must be noted that Brand Finance’s research was conducted prior to the lockdown parties scandal that has since engulfed the British government, and we may well see perceptions on Governance fall next year.

At the same time, an area where the UK has suffered as a result of Brexit is the ‘friendly’ metric, where it is now ranked 47<sup>th</sup>, compared to 27<sup>th</sup> last year, and 8<sup>th</sup> in 2020. This can be partly attributed to the emotional fallout of the separation with the EU, which many have viewed as an insular and alienating action.

Elsewhere, the UK has seen improvements in the Familiarity and COVID-19 Response pillars, thanks to the country’s contribution to the development of the Oxford-AstraZeneca vaccine and the effective

immunisation programme rolled out by the government. However, the UK government’s recent announcement of the removal of free testing and the requirement to isolate has thrown caution to the wind, which could impact the perception of its handling of the pandemic over time.

Last year’s top-ranked country, Germany, has also seen its Global Soft Power Index score rise to 64.6, but the stronger performances of the US and UK have caused it to fall to 3<sup>rd</sup> in the ranking. Germany has long acted as a beacon of strength and stability with a grand coalition government under Angela Merkel’s leadership. Now, leading a new red-green-yellow coalition, Chancellor Olaf Scholz has a big task ahead of him to manage the expectations and maintain the standards that have been set. After a cautious start, he has resolved to overhaul the nation’s foreign and defence policy in the light of the Russia-Ukraine crisis, which is likely to affect attitudes to Germany next year.

### China up to its highest position ever

China has seen its best ever performance in the Global Soft Power Index, with the nation brand recording improvements across all of the pillars in the Index. China has seen its Global Soft Power Index score increase by +9.9 to 64.2, moving it up from 8<sup>th</sup> to 4<sup>th</sup> in the overall ranking. Though China's performance may be a surprise to some in the Western world, it will have been expected across many developing countries.

Globally, China ranks 4<sup>th</sup> for Familiarity, 2<sup>nd</sup> for Influence, and this year has seen its Reputation score climb back to 2020 levels after last year's dip. China has also performed particularly well in the Business & Trade pillar, where it now ranks 1<sup>st</sup>, jumping above the US, Germany, and Japan in the process. China's economy grew by 8.1% in

2021 and its exports increased by 30% to reach record levels as demand for Chinese goods boomed.

China tackled the pandemic by implementing a zero-COVID policy, which has seen the continuation of lockdowns and isolation policies, and a robust mass testing and vaccination programme. The response has proven to be successful in China, and its COVID score improved by +1.7 as a result, raising it from 30<sup>th</sup> to 19<sup>th</sup> place. The second year of the pandemic also provided China with an opportunity to improve its perceptions on the global stage through vaccine diplomacy. China offered aid to countries across the world in the form of donated personal protective equipment and vaccinations – which undoubtedly has helped it move from 52<sup>nd</sup> to 28<sup>th</sup> in the 'generous' metric of the People & Values pillar.

Providing China with an opportunity to showcase itself to the world, the Beijing 2022 Winter Olympics are likely to give a boost to its soft power in next year's Index. Understanding how a nation brand is perceived in granular detail is key to developing soft power, and large-scale events can be successfully leveraged to serve a well-planned marketing and communications strategy. The Olympics can result in improvement on metrics directly related to its organisation such as 'a leader in sports' or 'fun', but equally allow to present the country as 'a great place to visit' and to advertise its 'products and brands the world loves'.

### Italy and Spain resurgence after COVID

Italy (54.7) and Spain (53.0) have observed a significantly improved performance in the Global Soft Power Index this year, with perceptions of both nations resurging following a battering by the COVID-19 pandemic the year before.

Initially, both nations suffered overwhelming consequences of the virus, with death tolls among the highest in the world. The vivid media coverage of this health crisis influenced perceptions of the two nations across the globe. During the second year of the pandemic, both Italy and Spain rolled out a successful vaccination programme, with much less hesitancy and pushback than many of their neighbouring nations. The rapid vaccination rates have consequently improved Italy and Spain's COVID-19 Response scores, which enjoyed +2.1 and +2.2 increases respectively.

As the intense media spotlight on negative news eased, traditional perceptions of both Italy and Spain as holiday destinations have been able to resurface and have come through in this year's Index results. Both Italy and Spain have performed well across all metrics, with Italy jumping nine spots to 10<sup>th</sup> position and Spain close behind in 11<sup>th</sup>, having ranked 22<sup>nd</sup> last year. Both nations were particularly commended in Culture & Heritage, where Italy ranked 2<sup>nd</sup> and Spain 5<sup>th</sup>. They also scored highly in People & Values, with Italy 4<sup>th</sup> and Spain 9<sup>th</sup>. Known for being popular tourist destinations with a rich heritage and pleasant climate, both nations are regarded as 'great places to visit' with 'fun' and 'friendly' people, with Italy additionally ranking top of the table for the 'food the world loves' for the third year running.

Looking to the future, perceptions of Spain and Italy's soft power are likely to continue to improve in the coming year, particularly within these key metrics. As we navigate towards a world where the virus will become endemic, both nations are set to enjoy a boom in their tourism industries, driving perceptions up as their physical and mental availability grows.



### Eyes of the world on Russia and Ukraine

At the time of writing this report, Russia has invaded Ukraine, following months of rising international tensions, but the result of the conflict is not yet clear. The global perceptions of both nations, as captured in the Global Soft Power Index 2022 research last autumn, are more than likely to have been affected already and will continue to be impacted more than any other nation's in the study over the coming months.

Especially in Europe and North America, perceptions of Russia, which had ranked 9<sup>th</sup> before the invasion of Ukraine, are likely to deteriorate across the board, although its score for Influence may rise due to the increased pressure that the conflict is exerting on politics and the global economy. Ranked 51<sup>st</sup>, Ukraine will likely see improvements in its perceptions abroad, especially for Familiarity, Reputation, People & Values,



Media & Communication, as well as particular metrics across other pillars such as ‘internationally admired leaders’ as President Volodymyr Zelenskyy’s courage continues to impress leaders and publics alike, or ‘influential in diplomatic circles’ as the tremendous efforts of the country’s diplomats to build an international coalition of support have brought tangible results. However, the nation’s scores for Business & Trade are almost certain to deteriorate, as wartime destruction and the ongoing humanitarian crisis have already caused enormous damage to Ukraine’s economy.

Although from a Western perspective this conflict marks a clear watershed in international relations, general publics in many countries and regions – from China and India to the Middle East and Sub-Saharan Africa – may not see as dramatic a shift in their perceptions of Russia. Moreover, in some of those markets, it may be the perceptions of Western nations that will deteriorate because of their entanglement in the conflict. Soft power of a nation varies from country to country and only the analysis of both global and multiple local standings can offer the full picture.

## REGIONAL LEADERS

### Australia and New Zealand cope with COVID-19 aftermath

In Oceania, both Australia and New Zealand have seen their ranks in the Global Soft Power Index return to their 2020 standing. Following the first year of the COVID-19 pandemic, both countries garnered a lot of praise for their effective responses, driving their perceptions upwards. This year, they have been overtaken by other nations which rolled out their vaccination programmes quicker and opened their borders earlier. In addition, their COVID-induced retreat from the interconnectedness of the modern world has taken a toll on

their perceptions in other areas of key significance to soft power.

Australia is now back to 13<sup>th</sup> position in the ranking with a Global Soft Power Index score of 52.7, following a year-long stint in the top 10. State-wide lockdowns were enforced, which led to a restriction of movement and impacted the economy negatively. Internationally, Australia witnessed a decrease in scores across Reputation and People & Values, as the nation sealed itself off from the outside world.

Australia only opened its international borders for travel as late as the first quarter of 2022 for the first time since the pandemic hit in 2020. According to the Global Soft Power Index 2021, the nation was ranked 1<sup>st</sup> as ‘a great place to visit’, now it ranks 4<sup>th</sup>. The nation brand lost points on a number of other metrics in the Culture & Heritage pillar in the 2022 ranking too. For a place that had been widely recognised for its vibrant tourism industry, the legacy of a screeching halt to international visits will present a challenge that needs to be addressed.

Neighbouring New Zealand claims 21<sup>st</sup> position globally with an overall Global Soft Power Index score of 48.4 out of 100, down 5 places year on year, and sees a similar performance to Australia.

In 2021, New Zealand was hailed as a global success story as a result of its approach to the pandemic, ranking 1<sup>st</sup> in the Global Soft Power Index for its COVID-19 Response. However, economic activity waned due to stringent lockdown measures and travel restrictions. The tourism sector was impacted with a dramatic drop in hotel bookings and retail sales. New Zealand’s COVID-19 Response continues to be recognised as exemplary, but the decline of the nation’s mental and physical availability around the world has caused its scores to fall in other areas.

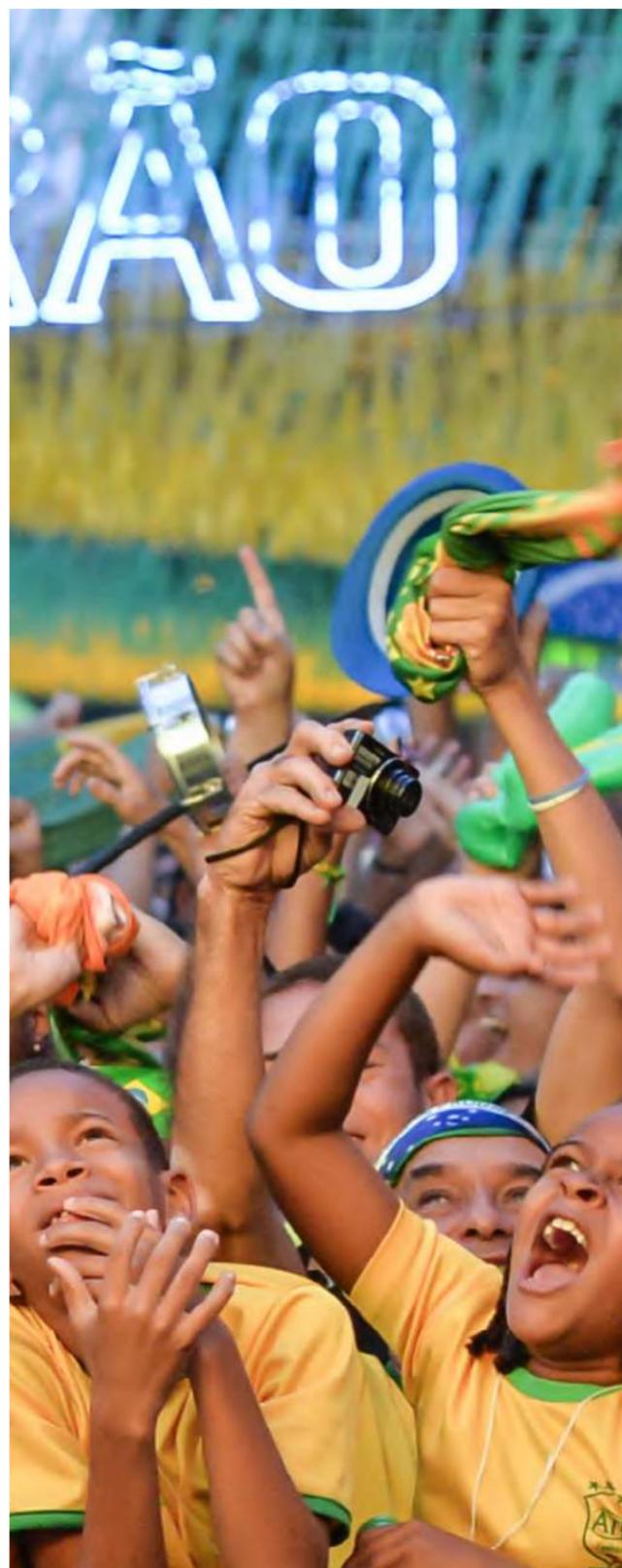


### UAE leads in Middle East and North Africa

The United Arab Emirates has achieved a Global Soft Power Index score of 52.0 this year, earning it 15<sup>th</sup> place in the ranking, up two spots from 17<sup>th</sup> in 2021. This is the highest position for any nation brand in the Middle East and North Africa, much ahead of Israel (23<sup>rd</sup>) and Saudi Arabia (24<sup>th</sup>).

The UAE has performed best on the Business & Trade pillar, counting among the global top 10. Its best metric overall is the ‘easy to do business in

and with’ where it comes 4<sup>th</sup>, followed by ‘strong and stable economy’ where it ranks 8<sup>th</sup>. The UAE is emerging from the COVID-19 pandemic strong, with its trade and investment prowess underscored by the success of the EXPO 2020 exhibition in Dubai. Aligning the working week with the majority of the world to Monday-Friday is likely to solidify positive perceptions of the UAE as a business-friendly nation in the next Global Soft Power Index survey, but the introduction of federal corporate tax from 2023 may moderate that impact in the following years.



Another key metric in the Index where the UAE ranks within the top 10 is Influence. The signing and implementation of the Abraham Accords is likely to be the key reason behind the nation's improvement here as well as in the International Relations pillar, where it claims 11<sup>th</sup> spot. The UAE has moved up on the 'good relations with other countries' statement to 23<sup>rd</sup> and on 'helpful to countries in need' it now ranks 11<sup>th</sup>, which can be attributed to donations of protective equipment and vaccines over the course of the pandemic. The UAE has also improved its COVID-19 Response score, ranking 12<sup>th</sup> compared to last year's 15<sup>th</sup>.

Nevertheless, the UAE's fastest improvement this year has been recorded in the Education & Science pillar, where the nation has gained +1.0 since 2021. Its focus on high-tech economy and specialised education as well as the bold venture into space exploration with the Emirates Mars Mission have no doubt influenced perceptions of the UAE's capabilities in this field.

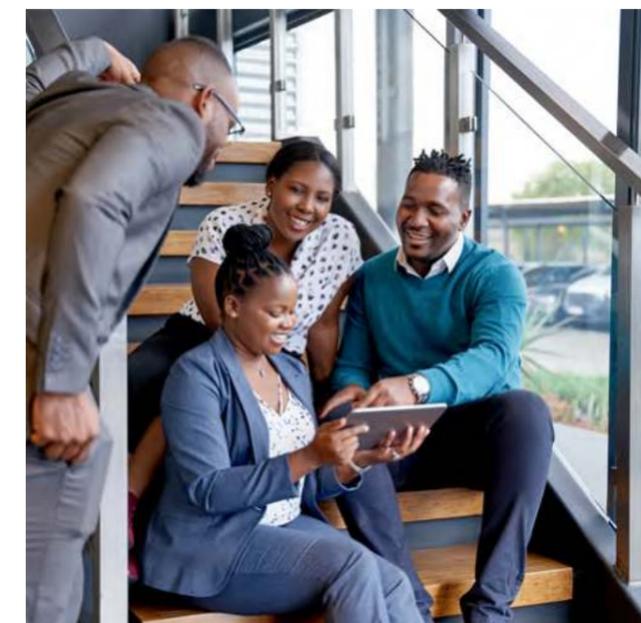
**Brazil and South Africa – regional ranking leaders**

With a Global Soft Power Index score of 43.4 out of 100, Brazil leads the charge as the highest-ranked nation in Latin America, jumping 7 spots to 28<sup>th</sup> position in the ranking.

Despite a slight dip in the Culture & Heritage score, it has remained Brazil's strongest pillar. The nation ranked 9<sup>th</sup> on this metric, as it continues to be perceived as 'leaders in sports' and 'influential in arts and entertainment' as well as offering 'food the world loves'. The largest contribution to its overall score improvement, however, comes from increased Familiarity (+0.7) and the knock-on effect that it has had on almost all metrics across the board. Larger nations are gaining in salience, and Brazil is a clear example of this trend.

Another regional soft power leader, South Africa has climbed 3 spots in the ranking to 34<sup>th</sup> position this year, consistently outperforming its neighbours in Sub-Saharan Africa.

South Africa's scores have increased across nearly all metrics, resulting in an impressive +3.1 Global Soft Power Index score gain to 40.2 out of 100. Similarly to Brazil, South Africa has increased its Familiarity as salience of larger nations grows, ushering in score improvements in soft power pillars, especially Media & Communication, Education & Science, and Business & Trade. Within the latter, the nation continues to be regarded as holding a lot of 'future growth potential', ranking 4<sup>th</sup> globally – its strongest performance across all statements. South Africa has experienced rapid economic development over the last decade, becoming an attractive location for investment. However, the nation's Governance scores remained low, with scepticism surrounding its political stability, track record on corruption, rule of law, and security.



**Global Soft Power Index welcomes 15 nations to 2022 ranking**

15 nations are added to the Global Soft Power Index 2022 ranking, but none of them make it to the top 50. Highest-ranking Maldives claims 52<sup>nd</sup> position, thanks to its top score globally for a 'great place to visit'. The country also ranks high on a number of other metrics, especially 'good relations with other countries', with the 7<sup>th</sup> highest ranking in the world.

The national tourism office of Maldives launched the Visit Maldives campaign to maintain interest in the islands as a popular tourist attraction, showcasing the attractiveness of major locations. The country is being promoted as the ideal destination for the hybrid and virtual workforce in order to foster consumer demand after COVID-induced contractions in tourism inflows.

In addition, Maldives' efforts in 'acting to protect the environment' have not gone unnoticed, resulting in 16<sup>th</sup> position for this statement. The nation prioritises international environmental activism due to its precarious geographical attributes which put it at high risk to climate change factors.

The low-lying archipelago is also fighting climate change by implementing holistic solutions on the ground. Maldives is to phase out single-use plastic by 2023 and to introduce a net-zero energy policy which implies making the switch from diesel to solar power.

In contrast to the performance of Maldives, three other tropical island new entrants to the Global Soft Power Index 2022 – Mauritius, Seychelles, and Barbados – have not been as successful in seizing the same perception-building opportunities around tourism and climate action, claiming much lower ranks.

Mauritius is at 71<sup>st</sup> position with a Global Soft Power Index score of 31.9 out of 100. The nation ranks well with regard to Reputation and COVID-19 Response. Mauritius opened its borders internationally to visitors early in October 2021 to bolster the tourism sector, having introduced precautions and contact tracing to restrict the spread of the virus.

With low scores for Familiarity and Influence in particular, Seychelles has scope for improvement, ranking 90<sup>th</sup> in the Global Soft Power Index. Despite 60% of the population being vaccinated for COVID, cases in Seychelles still increased widely. The reason for the spike in cases was the premature opening up of borders for tourists without any quarantine regulations. The surge in cases reflected lack of medical infrastructure and the urgent need to enforce stronger precautionary measures and guidelines for travel.

Barbados sits in 93<sup>rd</sup> position of the Global Soft Power Index 2022 with a score of 29.7 out of 100. The country ranks high on the People & Values, Culture & Heritage, and Governance pillars. Towards the end of 2021, Barbados was declared the world's newest republic after Queen Elizabeth II was officially removed from the head of state position. This significant decision will help the country develop a distinct identity around the world in the coming years.

The results of the European new entrants into the Global Soft Power Index 2022 make a strong case for the importance of nation brand marketing to improve perceptions and reputation globally. Increasingly popular destinations for tourism and investment, Georgia (57<sup>th</sup>) and Cyprus (58<sup>th</sup>) rank as high as in the top 60 in the overall ranking. Following these nation brands are Malta (65<sup>th</sup>) and Bosnia and Herzegovina (72<sup>nd</sup>) that lie in the middle of the table. Trailing behind them are Montenegro (97<sup>th</sup>) and Albania (104<sup>th</sup>) both ranking around the top 100 mark, despite having undoubtedly as much to offer to tourists and investors as Georgia or Cyprus. The range of difference between these nations' performances in the Index sheds light on the need for nation brands to shape their perceptions internationally by investing in marketing campaigns that promote their key soft power assets effectively.





# Medal Table



**Konrad Jagodzinski**  
Communications Director,  
Brand Finance

As part of our annual analysis, results from the general public survey are tallied to see which nation comes first, second, and third on the key metrics of Familiarity, Reputation, and Influence as well as on each of the 34 statements within the 7 Soft Power Pillars and under the COVID-19 Response measure. We award the winners with gold, silver, and bronze medals just like in sports competitions. There is a total of 111 medals across 37 disciplines to be won.

After a rigorous analysis of our research – covering over 100,000 respondents across more than 100 countries, representing all continents and regions of the world – the results are in, and the soft power Olympics are more competitive than ever.

## USA & Switzerland are neck-and-neck

With a total of 14 medals each, including 10 golds a piece, the United States and Switzerland cross the finish line together in a photo finish for first place. Switzerland topped the table last year, but in a similar story to the overall Global Soft Power Index ranking, the USA has regained ground this year.

Switzerland sets the standard across several measures, but it is in pole position

in Governance where it grabbed the gold medal for four out of the five metrics – politically stable and well governed, high ethical standards, safe and secure, and respects law and human rights. The alpine nation also came out on top for overall reputation, trustworthiness, good relations with other countries, trustworthy media, as well as two of the three COVID-19 metrics.

The USA continues to perform well across various measures where it has historically led, including overall familiarity and influence, influential in arts and entertainment, influential in diplomatic circles, affairs I follow closely, and influential media. However, its jump up the podium this year is thanks to improved performances in leaders in sports, helpful to other countries, a leader in science, and internationally admired leaders where it now leads the pack.

## Canada's easy does it

Canada skated up into 3<sup>rd</sup> place, up one rank from last year, and secured the most medals out of any nation in the table this year at 17 in the process. Canada is a nation famed for its politeness, which is well reflected in the gold medals it won for an appealing lifestyle, easy to communicate with, and generosity.

## Soft Power Medal Winners

Pillars	Gold Medal	Silver Medal	Bronze Medal	Metrics
				Familiarity
				Reputation
				Influence
				A strong and stable economy
				Easy to do business in and with
				Future growth potential
				Products and brands the world loves
				Politically stable & well-governed
				Respects law and human rights
				High ethical standards and low corruption
				Safe & secure
				Internationally admired leaders
				Influential in diplomatic circles
				Good relations with other countries
				Helpful to other countries in need
				Acts to protect the environment
				Rich heritage
				A great place to visit
				An appealing lifestyle
				Influential in arts and entertainment
				Food the world loves
				Leaders in sports
				Influential media
				Trustworthy media
				Affairs I follow closely
				Easy to communicate with
				Strong educational system
				A leader in science
				Innovative technology and tech companies
				Friendly
				Fun
				Generous
				Tolerant & Inclusive
				Trustworthy
				Supporting economic recovery
				Health & wellbeing including vaccinations
				Helping other countries manage/recover from COVID-19

Fourth-placed China secured an additional two gold medals this year, adding future growth potential and innovative technology to its previous success in easy to do business with. Will it make it onto the podium next year?

**UK falls short of the finish line**

Despite boasting 10 medals and increasing its standing in the overall Global Soft Power Index ranking to 2<sup>nd</sup>, the UK has once again failed to win enough golds to guarantee its place at the soft power Olympics podium, coming 7<sup>th</sup> in the classification. Italy pipped the UK to the post with its two gold medals securing 6<sup>th</sup> place, as it topped the friendliness metric as well as boasting the food the world loves top prize.

Germany slid down the medal table from 2<sup>nd</sup> to 5<sup>th</sup> this year, principally due to the removal of the Specialist Audiences’ input in the Global Soft Power Index – who awarded Germany four golds last year. It still has an impressive collection of 12 soft power medals, but was a victim of the USA’s success, as America usurped Germany in internationally admired leaders and helpful to other countries.

**Soft power for all**

Whilst the nations featured at the top will not be a surprise to those who have followed the Global Soft Power Index, the medal table highlights that there is a piece of the pie for all countries to lay claim to.

This year, the new entrant Maldives secured its first medal, and it was a gold one to boot. The nation scooped the top prize for being a great place to visit, seeing off stiff competition from Switzerland and France, which took silver and bronze respectively. Similarly, Brazil was seen to be the most fun nation in the world – perhaps less surprising given it is the carnival capital of the world. Egypt also continues to be viewed as the nation with the richest heritage in the world,

fending off competition from China and Italy successfully.

All three of these countries – the Maldives, Brazil, and Egypt – have carved a clear for themselves in the soft power arena, and their gold medal success sees each of them rank higher in the medal table than such global players as France or Spain.

**Soft Power Medal Table**

					Total
1		10	2	2	14
1		10	2	2	14
3		3	7	7	17
4		3	2	2	7
5		2	7	3	12
6		2	1	2	5
7		1	6	3	10
8		1	5	2	8
9		1	1	4	6
10		1	1	0	2
11		1	0	1	2
12		1	0	0	1
12		1	0	0	1
14		0	2	4	6
15		0	1	3	4
16		0	0	1	1
17		0	0	1	1*

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\* Research conducted in the autumn of 2021 - does not account for the impact of Russia's invasion of Ukraine.



# Familiarity, Reputation, and Influence: All Three Drive Soft Power Success



**Steven Thomson**  
Insights Director,  
Brand Finance

The Global Soft Power Index is a classic example of the ‘balanced scorecard’ approach to evaluating brand equity and strength, in this case that of nation brands. The key word here is ‘balance’, as it acknowledges a key truth: growing a brand – any kind of brand – is made easier if it can perform strongly across a range of dimensions or metrics. It is difficult to build soft power solely through being seen as a model society with a great reputation – the stark reality is that ‘power’ encompasses elements of visibility, influence and weight.

Let’s look at our definition of soft power:

“A country’s ability to influence the preferences and behaviours of various actors in the international arena (states, corporations, communities, publics etc.) through attraction or persuasion rather than coercion.”

From this it might appear that building nation brand equity is simply a matter of making your country’s products, people, and values as attractive as possible. But that cannot be sufficient in its own right – your

nation may have many attractive qualities, but if the world is unaware of them, they are wasted talents. In a ‘party of nations’, are you someone working the room, talking confidently to everyone, or huddled in the corner waiting to be spoken to? Hence, in our view, effective soft power has three key dimensions, which form the three KPIs in our index:

- + Familiarity: A hygiene factor – if people know more about your country, its talents, businesses, and resources, then soft power is enhanced.
- + Reputation: For a nation to be attractive and a role model for others, its overall reputation must be strong and positive.
- + Influence: A direct measure of the perceived presence and impact that your country has in other countries. It is also a way of assessing whether soft power really plays out globally, or whether some nations’ soft power is restricted to certain regions or cultural affiliations.



## The Importance of Familiarity and Mental Availability

Marketing guru, Professor Byron Sharp, outlined the importance of mental (and physical) availability in driving the growth of commercial brands. Put simply “the better a consumer knows a brand, the better they tend to feel about it – familiarity breeds contentment”. Mental availability is more than mere ‘brand awareness’ – it is the extent to which the brand and its features are accessed in memory in relevant situations.

For nation brands, similar (though not identical) patterns are evident. Awareness and Familiarity are important – clearly, it is beneficial that as many people as possible (consumers, business decision-makers, media, influencers) think about your country, its values, key strengths, and attractions. But it is the broader extent to which that country touches your life in some way that makes the difference.

Our data shows that large countries hold a clear advantage – smaller nations, especially more geographically remote ones – struggle for visibility and attention. Big nations attract more media attention, bigger budgets to promote themselves, bigger diplomatic footprint, and have more people and companies out in the world. But it is not sheer size alone of course – Indonesia is the 4<sup>th</sup> largest country in terms of population and is in the top 20 for GDP, but for many people it does not affect their lives in any significant way (it ranks only 46<sup>th</sup> for Familiarity in our measures, for example).

What, beyond size, drives salience and mental availability? Accessibility helps – and in this regard English-speaking nations have an in-built advantage, especially those with strong reach via traditional and digital media and entertainment. There is also the less tangible (but equally important) dimension of relevance – do you care about this country, pay attention to what is going on there?

Global Soft Power Index metrics indicating mental availability

	<i>Familiarity</i>	<i>Influential in arts and entertainment</i>	<i>Affairs I follow closely</i>	<i>Influential media</i>
<b>United States</b>	1	1	1	1
<b>United Kingdom</b>	2	3	2	2
<b>France</b>	3	2	9	3
<b>China</b>	4	10	3	5
<b>Italy</b>	5	4	14	9
<b>Germany</b>	6	9	4	4
<b>Japan</b>	7	7	6	7
<b>Canada</b>	8	16	7	13
<b>Spain</b>	9	6	17	10
<b>Russia*</b>	10	12	5	6
<b>India</b>	13	5	34	20
<b>South Korea</b>	15	8	12	8
<b>Turkey</b>	18	11	8	14

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\*Research conducted in the autumn of 2021 - does not account for the impact of Russia's invasion of Ukraine.

Putting various elements of ‘mental availability’ together, the strong performance of the United States is very apparent.

Everyone ‘knows’ the US, and there is a huge appetite for its popular culture and entertainment, even among those who have concerns about American influence or overreach (Kim Jong Un is believed to be a big fan of the NBA). The US matters to people, and US culture and products touch most people’s lives literally every day.

The UK may not quite have the same presence, but nonetheless enjoys high salience and accessibility, with a language advantage that is near-impossible to replicate.

No doubt that China aspires to reach a similar level of mental availability, and clearly the world now sits up and takes notice of events in China more than ever before. But the softer, cultural elements of soft power are harder work, and this acts as something of a brake.

Overall, the same cluster of larger, more familiar nations occupies the top rankings on all four metrics, even though three of these are based on scores among those who are already familiar with that nation. This is a variation on another general law of branding, Andrew Ehrenberg’s well-known ‘double jeopardy’ law, whereby bigger brands enjoy higher levels of interaction among their brand users.

This presents a challenge for smaller nation brands. They can punch above their weight in terms of mental availability, and some do – notably Switzerland, the UAE, and New Zealand. But there is a limit to what can be achieved, at least on a global level.

Smaller nations which struggle to achieve global salience may have to prioritize. They can aim for regional influence perhaps, focusing on near-neighbours. Alternatively, focusing efforts on major source markets has clear logic.

Getting the balance right is tricky, and our data suggests that some smaller European nations are in danger of eroded salience and mental availability, because they lack presence in parts of the world which are fast-growing. Consider Denmark’s familiarity levels and ranking, for example.

Denmark has good presence in Western Europe, but many smaller EU nations face a strategic challenge in building salience and relevance in places like Brazil, China, India, and Nigeria – markets of increasing importance in the global mix.

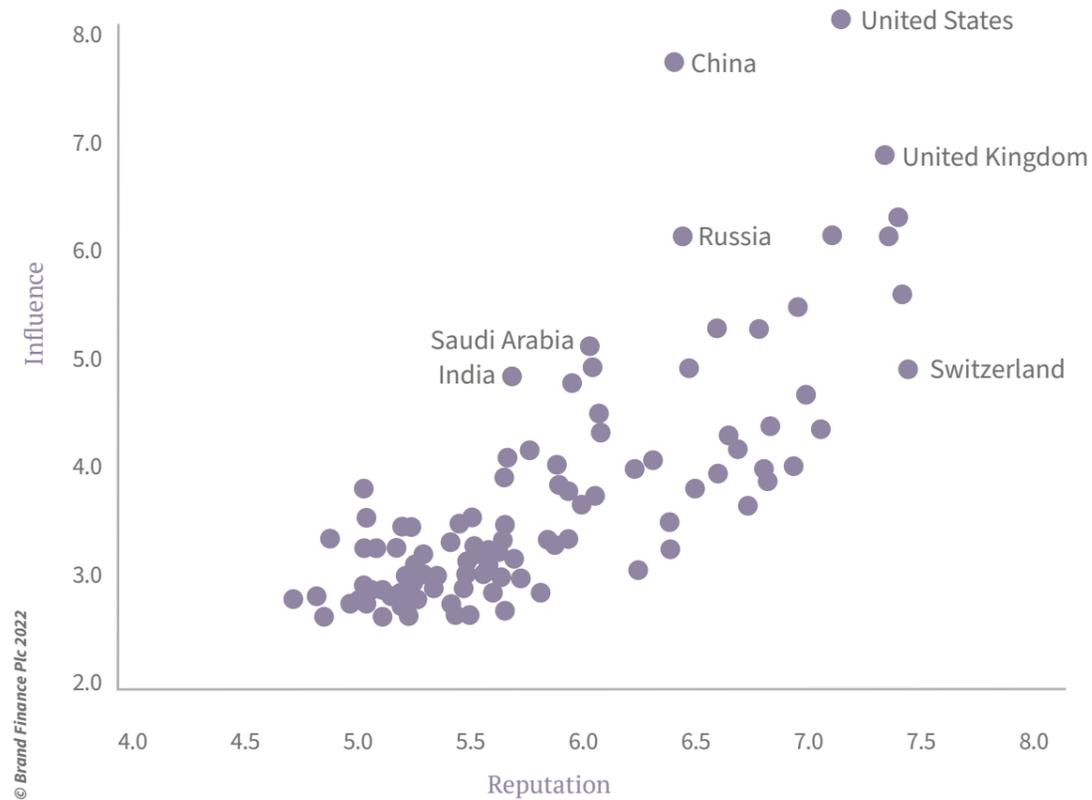
Denmark’s rank for Familiarity across markets

<b>Brazil</b>	39
<b>China</b>	31
<b>France</b>	23
<b>Germany</b>	13
<b>India</b>	41
<b>Indonesia</b>	33
<b>Nigeria</b>	56
<b>Sweden</b>	2
<b>UK</b>	21
<b>USA</b>	39

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### Reputation vs. Influence



#### Reputation still counts

Salience and familiarity are clearly import foundations of soft power. But soft power concerns the power of attraction, and for that to be maximised, stakeholders need to see something desirable in your actions, governance, values, culture, or products.

Hence the need to measure overall reputation and nations' perceived excellence and leadership on the various pillars of soft power. But this begs the question: can a country with a negative or mixed reputation really fulfil its soft power potential?

Clearly, there is a high correlation between perceived Reputation and Influence – a 0.8 correlation statistically, in fact. It is fundamentally impossible to achieve Influence on any scale if a nation's Reputation is poor – powers of attraction

will be severely limited, and specific strengths are undermined by bigger and broader weaknesses. For example, significant numbers acknowledge the cultural influence and friendliness of the people of Nigeria, but wider reputational issues around governance, economic stability, and technological skills make it very difficult for Nigeria to capitalise on these strengths. As a result, Nigeria's influence is well below where a country of its size and strategic position might be.

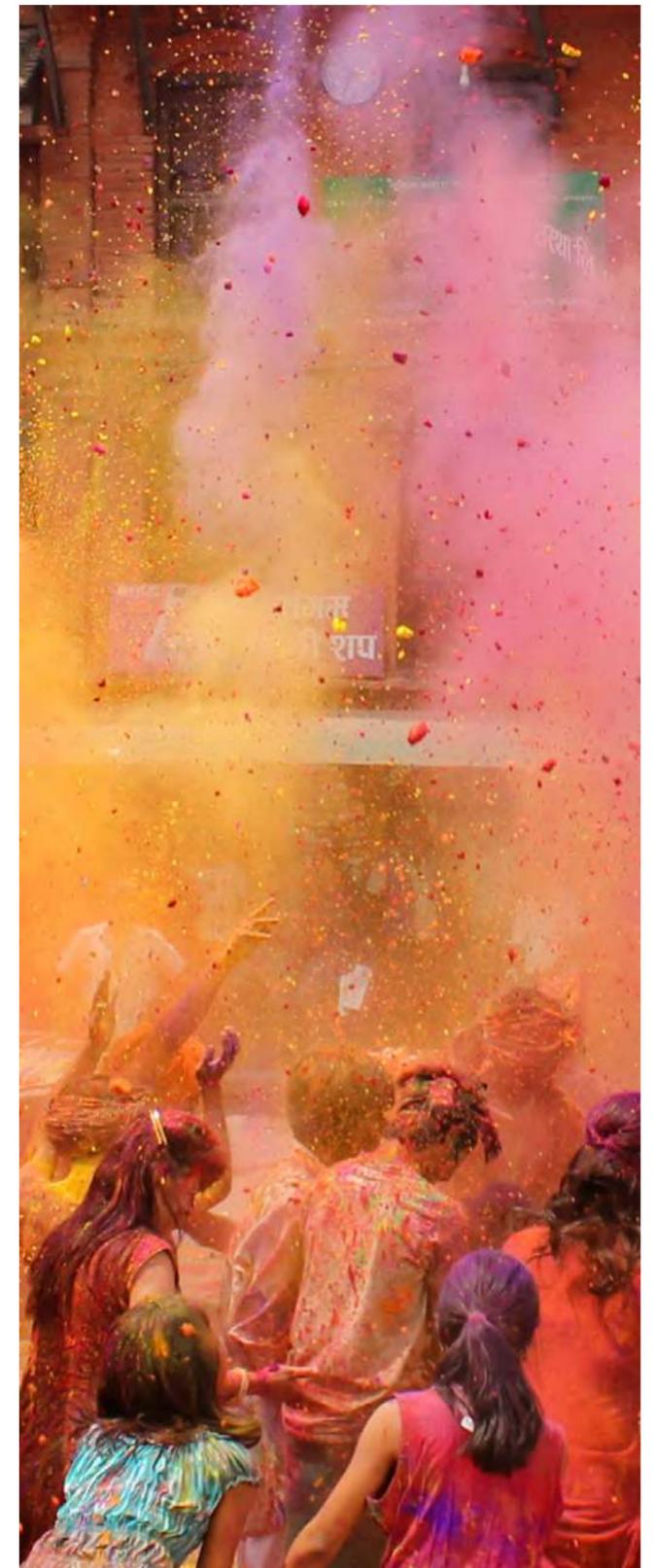
Reputation, therefore, matters – but the graph above shows Influence (and ultimately, soft power) is not purely a function of Reputation. Countries such as Russia and China all have Influence well above what one might expect given their somewhat mixed reputations – reflecting to some extent their ability to apply hard power to soft power objectives.

However, the key here is that these countries have mixed or moderately positive reputations: Russia ranks 23<sup>rd</sup> (pre-invasion of Ukraine), China 24<sup>th</sup> – not great, but both close to the top of the table. These rankings might surprise some, especially those based in Europe or North America. But outside these regions, attitudes towards Russia or China are far from negative. An additional question asked (not part of the Index calculation) is whether a country's Influence is a positive or negative force, and that sheds more light on China's Influence in a number of large markets beyond Europe and North America.

However, our data (and common sense) indicates that a more positive Reputation would nonetheless improve any nation's Influence and overall soft power. The power of attraction requires more than simply a loud voice and eager networking at the soft power party. Knowing when and how to put others at ease and make friends are an asset socially, as well as in the world of nation branding.

#### China's influence sentiment across markets

	Positive influence	Negative influence
Brazil	34%	15%
Indonesia	35%	13%
Turkey	46%	20%
Bangladesh	37%	2%
Ethiopia	54%	8%
Nigeria	50%	4%
Pakistan	76%	1%



03

## Nation Brand Spotlights

### What does soft power look like around the world?

- Australia
- Brazil
- Canada
- Chile
- Germany
- Finland
- France
- India
- Indonesia
- Ireland
- Italy
- Finland
- New Zealand
- South Africa
- Sweden
- United States

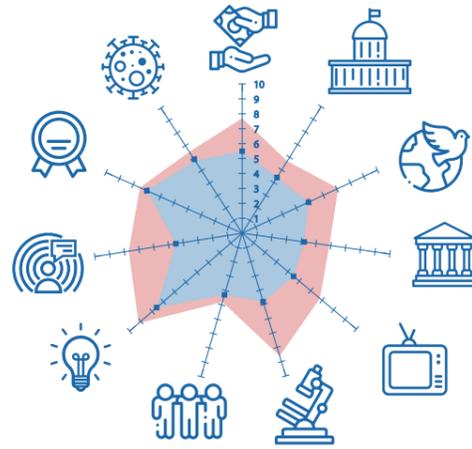


Australia's performance compared to best in class per pillar  
 ● Best in Class ● Australia's Results

# Australia

Rank #13 ↓ #10

Score 52.7/100 +0.5



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**Mark Crowe**  
 Managing Director,  
 Brand Finance Australia

Australia has again performed very strongly across a number of attributes in the Global Soft Power Index, especially familiarity and reputation. However, despite a slight soft power score increase, the large gains by Spain, Italy, and Russia, meant Australia dropped three places to 13<sup>th</sup> in the ranking.

Australia continues to perform well for Business and Trade underpinned by a strong and stable economy, while being seen favourably for products and brands the world loves.

The restrictions on international travel have impacted Australia's performance across several areas covered under 'Culture and Heritage' and 'People and Values' where less interaction globally has led to an "out of sight, out of mind" perception, especially in terms of 'a great place to visit', where people globally stayed closer to home. The re-opening of borders and the government's need to promote tourism should see a return to higher scores across these two pillars.

While Australia has always enjoyed a strong reputation for its educational system, this year has also seen a significant increase in scores for leadership in science and technology.

The relatively successful management of the COVID-19 pandemic has been acknowledged, with continual high scores. However, delays in the vaccine rollout along with prolonged restrictions, have probably prevented Australia from being ranked higher than 13<sup>th</sup>. Strong preventative measures along with strict quarantine measures did elevate negative perceptions in terms of restrictions in movement and impact on the economy.

While Australia is perceived favourably for protection of the environment, its high rating for international relations will be under pressure to provide a tangible commitment to zero target emissions by 2050, along with the potential threat of other countries imposing climate tariffs. This is a critical issue for an economy that is reliant on exporting natural resources including fossil fuels.

Australia enjoys an enviable well-earned reputation across several soft power attributes. It continues to play to its traditional strengths with potential to improve further through a return to high overseas visitation for business, education and leisure.





Brazil's performance compared to best in class per pillar  
 ● Best in Class ● Brazil's Results

# Brazil

Rank #28 ↑ #35

Score 43.4/100 +5.3



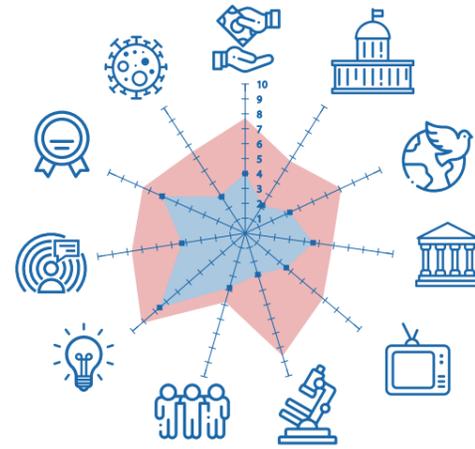
**Eduardo Chaves**  
 Managing Director,  
 Brand Finance Brazil

In 2022, Brazil rose 6 positions in the Global Soft Power Index, from 34<sup>th</sup> to 28<sup>th</sup>, one place behind its 27<sup>th</sup> rank achieved in 2020. There was an improvement in its overall country brand index measured by the Global Soft Power Index, but other nations grew faster as they managed to rebound from COVID-19. Brazil earned an overall score of 43.4, up +5.3 points this year.

This has not been the best year for the nation brand image of Brazil, but even so, the world recognizes that there has been an improvement. There were mismatches between public health and the economy, which now seem to be managed better. The management of the COVID-19 pandemic is perceived to have improved with public health actions better coordinated. Consequently, the vaccination rate is increasing, deaths are decreasing, and the economy is showing signs of improvement in several sectors.

In the Familiarity pillar, Brazil grew by +0.7 points, reaching a score of 7.6, which places it in 12<sup>th</sup> position alongside Australia and India. In the 'Influence' pillar, Brazil remained steady, with a positive increase of +0.1 points, from 4.2 to 4.3, and staying in 19<sup>th</sup> position, below Australia and above the Netherlands in this measure. In both pillars, Brazil led Latin America.

In the Reputation pillar, Brazil does not rank as highly as in the previous dimensions, appearing only in the



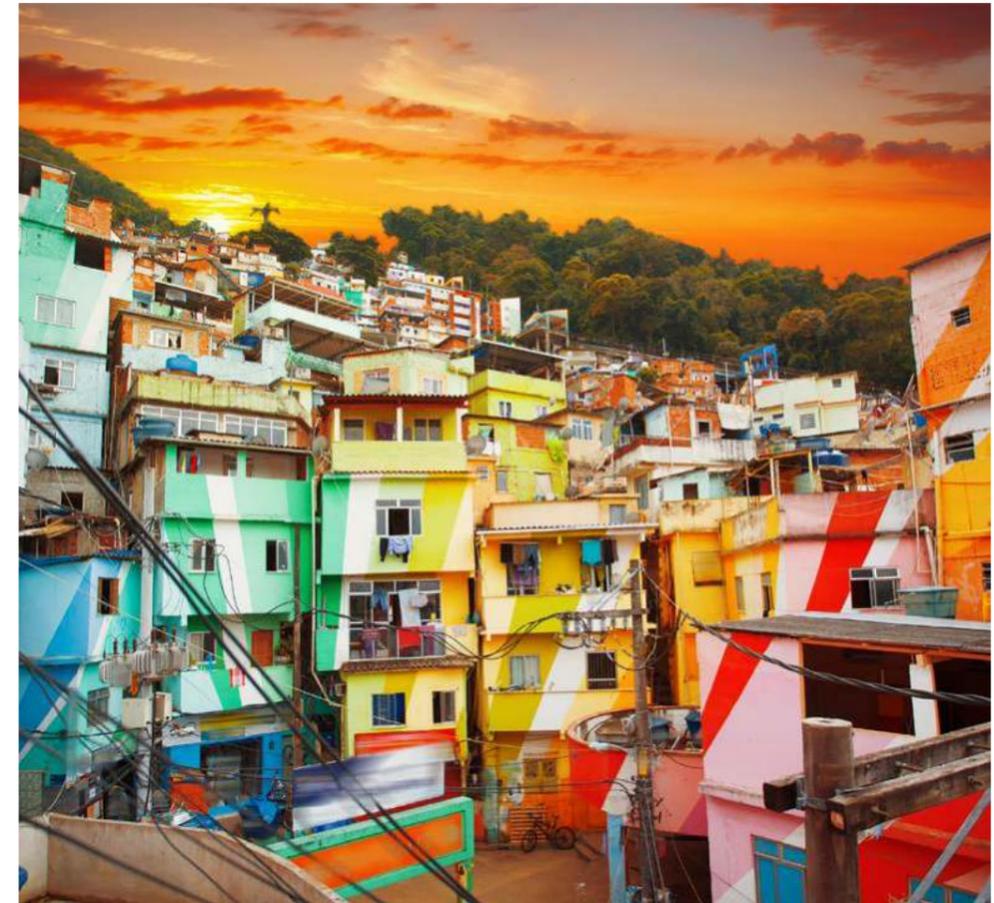
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30<sup>th</sup> position. Brazil, with its score of 6.1, is alongside Poland and Qatar, with scores above the global average of 5.75. Even so, Brazil is the best-positioned Latin American nation in this criterion.

In the Business and Trade pillar, Brazil appears only in 29<sup>th</sup> position with a score of 4, equal with Ireland, South Africa and Thailand, but remains the highest-ranked Latin American nation. Cultural and bureaucratic factors make Latin countries complex and difficult to do business compared to other jurisdictions, and Latin American nation brands are harmed as a result.

The Governance pillar is the second lowest metric evaluated for Brazil. The country is in 58<sup>th</sup> position, with a rating similar to the Czech Republic, Egypt, Indonesia, Uruguay and Mauritius. This position shows a dimension that the Brazilian nation can significantly improve in. In Governance, Panama and the Dominican Republic rank higher than Brazil. Corruption measurement indices show that countries in Latin America, Africa, and Asia tend to be more corrupt, with Brazil needing to improve significantly in this pillar.

For International Relations, Brazil again does not appear among the 20 largest brands in the world. With a score of 3.3, with countries such as Egypt, South Africa, and Iceland, Brazil is positioned as the 31<sup>st</sup> nation.



No country in Latin America surpasses this position, again demonstrating another dimension that Latin American nations can improve on.

In Culture and Heritage, Brazil is ranked ahead of most countries with a score of 4.6, despite a fall of -0.5 points this year. Brazil equals China in this measurement criterion after China improved by +0.5 points in this area to 4.6. Brazil is clearly ranked highest in Latin America in this area. With a pluralistic, diversified, and open culture, Brazil has a lot of potential and effectiveness in this criterion. From important classical music artists like Heitor Villa-lobos and Carlos Gomes, to internationally renowned musicians like Tom Jobim and Sergio Mendes, Hollywood actors like Rodrigo Santoro and Alice Braga, Brazil is prominent in the global arts world.

In the Media and Communication, pillar, Brazil is in 26<sup>th</sup> position, similar to Saudi Arabia, but is again the nation with the best score in Latin America. Seeking an impartial, democratic, and fact-based media, Brazil is home to substantially open and lively media with freedom of expression, important points for a free and democratic country.

In the Education and Science pillar, Brazil is in the 35<sup>th</sup> position, below Thailand and above Hungary. Brazil and Mexico lead Latin America with the highest number of papers published in relevant journals. Despite low schooling scores when compared to more developed countries, South American countries are improving basic education, higher education and technical training.

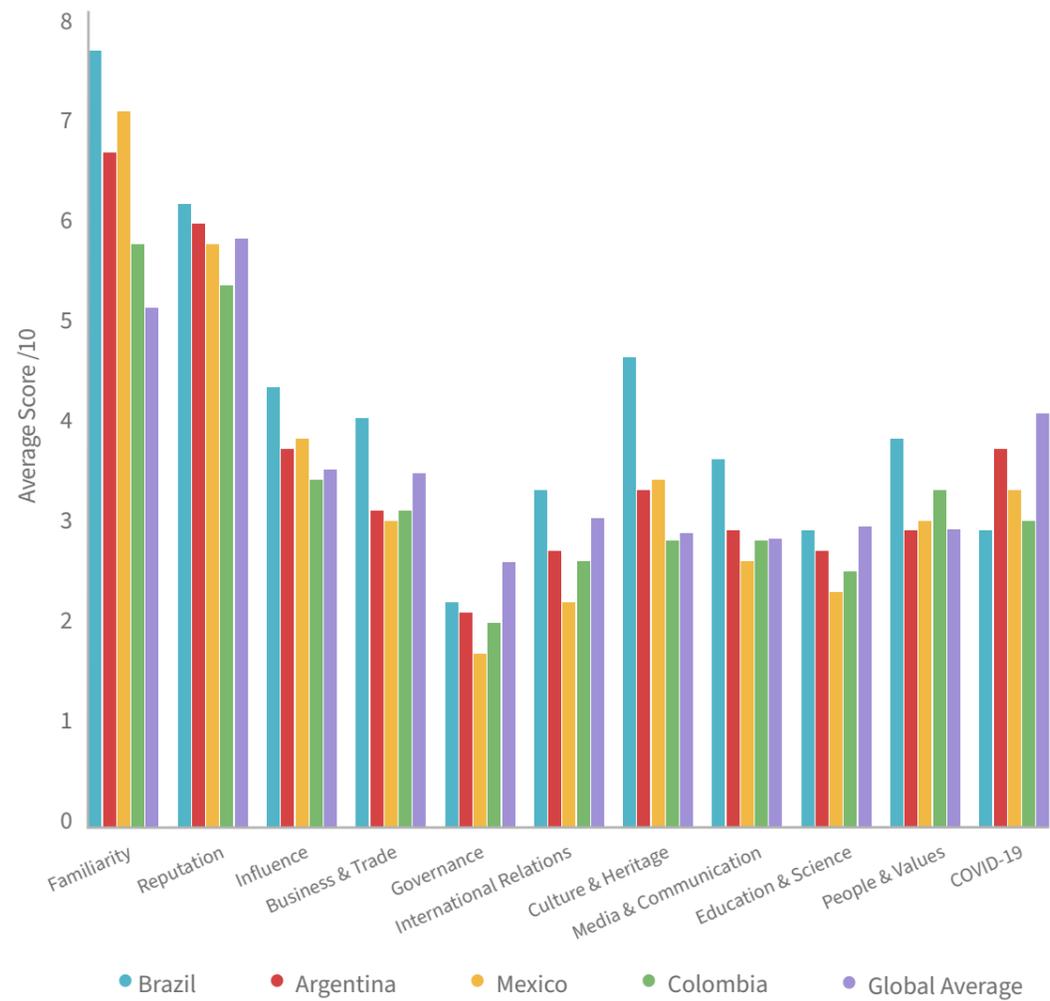
In the evaluation of the 'Covid score,' Brazil has its worst performance, being the 109<sup>th</sup> nation in the ranking in 2022. In the company of nations such as Cameroon, Brazil demonstrates to the world that it did not deal well with the public health crisis. In general, Latin American countries surpassed Brazil in this criterion, and few countries had worse scores.

In an analysis of the 120 nations ranked, there are seventeen other Latin American countries in the ranking: (1)

Argentina in 38<sup>th</sup> position (2) Mexico 42<sup>nd</sup> (3) Colombia 48<sup>th</sup> (4) Cuba 53<sup>rd</sup> (5) Panama 54<sup>th</sup> (6) Chile 55<sup>th</sup> (7) Dominican Republic 61<sup>st</sup> (8) Uruguay 66<sup>th</sup> (9) Costa Rica 67<sup>th</sup> (10) Paraguay 80<sup>th</sup> (11) Peru 82<sup>nd</sup> (12) Venezuela 89<sup>th</sup> (13) Bolivia 92<sup>nd</sup> (14) Ecuador 98<sup>th</sup> (15) Guatemala 111<sup>th</sup> (16) Honduras 118<sup>th</sup> and (17) Trinidad and Tobago 120<sup>th</sup>.

The following graph shows the average of the general variables compared with the larger Latin American countries: Brazil, Argentina, Mexico and Colombia.

### Global Averages vs the Largest Latin American Countries



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Canada's performance compared to best in class per pillar  
 ● Best in Class ● Canada's Results

# Canada

Rank #7 ↓ #4

Score 59.5/100 +2.3



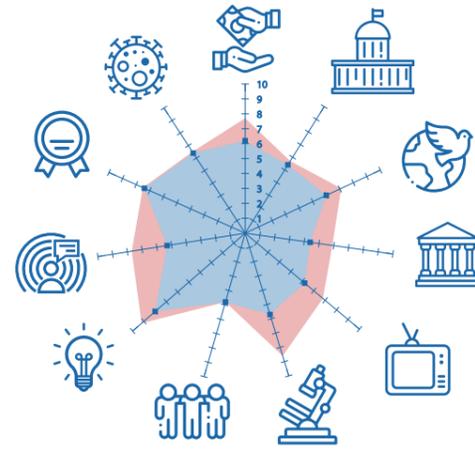
**Charles Scarlett-Smith**  
 Managing Director,  
 Brand Finance Canada

Canada's overall Global Soft Power Index score is up 2.3 points on last year. Canada continues to be one of the highest performing nations in the ranking, though this year's growth was not enough to keep pace with some of the other nations in the top ten.

Though it is undeniable that there are countries with more soft power, no one can match Canada's consistent, but perhaps more subtle, performance. This in many ways defines both the Canadian experience and how the world sees Canada, especially when compared to the US, (which also happens to be our favourite pastime).

Of the 34 statements that are used to define a nation's soft power, Canada receives a gold medal in three categories: "generosity", having "an appealing lifestyle", and being "easy to communicate with". More impressively, Canada scores either 1<sup>st</sup>, 2<sup>nd</sup>, or 3<sup>rd</sup> more than any other nation – a total of 17 medals: three gold, seven silver, and seven bronze. Notable silver medals include having a "strong education system", being "tolerant" and "safe and secure". (For the interest of our Canadian readers, on these statements the US ranks 7<sup>th</sup>, 16<sup>th</sup>, and 41<sup>st</sup> respectively).

Canada is 8<sup>th</sup> overall for Business & Trade. For a country of just under 40



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million people, this is a great, albeit expected result. Well-regulated conservative business practices, and opportunity for resource extraction, have and will continue to shield the Canadian economy from turbulent economic swings. Our businesses are dependable and well-regulated. This has proven to be a strong foundation and launchpad for global expansion.

What is more surprising is how Canada has the second highest reputation score, behind Switzerland, and the third highest Governance score, behind Germany and Switzerland. This is testament to how Canada has remained relatively immune (for now) from the growth of populist division-based politics. But it also probes at Canada's most existential questions: How much does our country benefit in positive perception from being in the shadow of the US? And how much are we willing to accept less from our governments and institutions with our constant relativism?

While the Freedom Convoy's run as a top global news story was short-lived, it has left a lasting impression, and inspired copycat movements around the world. Canada's stable, quiet, and polite reputation is at a crossroads, time will tell if we are experiencing a sea change.



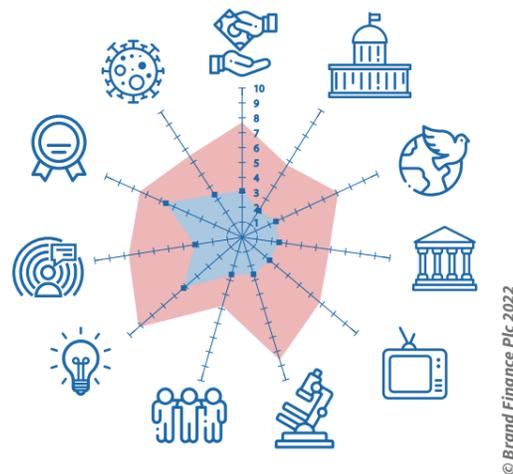


Chile's performance compared to best in class per pillar  
 ● Best in Class ● Chile's Results

# Chile

Rank #55 ← #55

Score 33.8/100 +0.4



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**Constanza Cea**  
 Executive Director,  
 Imagen de Chile



**Chile is known for its breathtaking nature, but it also has a vibrant culture and fantastic people. How do you strike a balance in your nation brand marketing communications to promote both?**

Imagen de Chile has been working to create a positive perception of Chile abroad for the last twelve years. During 2019, we worked on updating Chile's brand strategy, searching for what made us unique. We wanted to reflect who we are today and what we can contribute to the world. Chile is already known abroad for its amazing landscapes and geography. We wanted to move beyond that so we can also become known for our people, their talent and vision.

We conducted hundreds of interviews, took surveys, and spoke to stakeholders, and we realised that what we are most proud of is ourselves, and that the largest gaps between what we are and what the

world doesn't know about us is our talent, our ability to innovate, and our creativity.

This review resulted in our "Chile: Creating Future" concept, based on Chilean contributions to sustainability, quality of life, and community-based efforts.

Chile has an entrepreneurship ecosystem which is recognised worldwide. We have companies that have become unicorns and others that are on their way to doing so. On the other hand, if we look at astronomy, Chile's desert has exceptional conditions for observing the universe and this has enabled us to become home to 40% of the world's terrestrial observation. We are also proud that a significant portion of our land and maritime areas are dedicated to conservation, and we are the most attractive emerging country for investing in renewable energy. It is a challenge, but we are trying to balance the communications in order to promote both our amazing nature and our talented people.



**A lot of discussion around climate change focuses on the Northern Hemisphere, but it is an issue that touches everyone around the globe. With such a variety of landscapes available to study and a recognised scientific prowess, how can Chile help us understand climate change better?**

Chile is one of the longest countries around the globe (4,270 kilometers or 2,653 miles). This is a huge advantage in terms of measuring the impact of climate change. Last year, the Chilean Government created the Climate Change Observatory (Observatorio de Cambio Climático, OCC), a unique initiative that will generate and use scientific evidence about this phenomenon that affects the entire world. This observatory will integrate sensors installed throughout Chile and the data gathered by them through three main components. First, a platform and a technical team led by the Science Ministry. Second, a network of sensors at the Antarctic bases through a Chilean Antarctic Institute project. And third, an integrated network of sensors for earth observations.

This Observatory will allow scientists to monitor, measure, and forecast the evolution of our climate from the northern city of Visviri to the Union Glacier base in Chilean Antarctica.

This observatory will make use of Chile's longitudinal gradient to measure and prevent climate change.

**Chile has been leading the way in vaccination rates, but it seems the news of that is not permeating enough to the general public's understanding. How do you make your country's voice heard in such a competitive media market?**

A very important part of the work we do at Imagen de Chile is to measure how the world sees us. This allows us to understand what kind of image we are projecting and how to work with it – what excites people, connects them, and motivates them. According to our latest survey, only 26% of the people in 12 main cities around the globe say Chile is familiar to them. This is a very important challenge, that can lead us to a huge opportunity to tell the world our successes stories. We were able to implement a vaccination rollout that made us really proud and that has been recognized internationally as one of the fastest in the world. These have certainly been challenging times because the energy of an entire country has been focused on the health emergency. But it also has a positive side. It has given us an opportunity to show who we really are, and it tells a lot about Chile. Our success has been thanks to the contributions of all Chileans, and this is a success story we need to talk about more.



China's performance compared to best in class per pillar  
 ● Best in Class ● China's Results

# China

Rank #4 ↑ #8

Score 64.2/100 +9.9



**Scott Chen**  
 Managing Director,  
 Brand Finance China

This year, China's soft power performance has been exerted along several main lines including anti-COVID-19 efforts, innovation, the Winter Olympics, and its commercial brands.

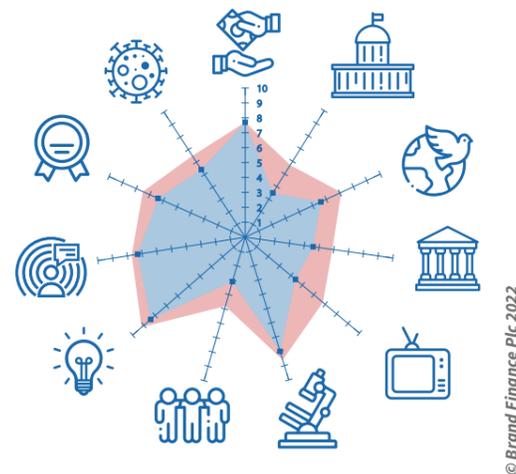
## Economic development in the pandemic

In the second year of the pandemic, China's GDP increased by 8.1% and this rate was the best among the world's major economies, leading to China being rated 1<sup>st</sup> in the Global Soft Power Index's Business & Trade pillar. China's GDP reached US\$17.7 trillion with the Index rating China 1<sup>st</sup> globally as 'easy to do business in and with,' and first at 'future growth potential.'

A recent government work report puts China's GDP growth target at around 5.5% in 2022 — at the top end of the forecast range given by many economists, and significantly higher than the IMF's forecast of 4.8%. Achieving such a high level of economic growth would justify the Index's rating of China at 9.5 out of 10 on the measure of 'a strong and stable economy.' This will help China's "transition from Chinese products to Chinese brands", so it is possible that the next few decades will bring further growth of Chinese brands.

## COVID-19

At the end of 2021, the Chinese Government stated that there were 2,886



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confirmed cases of COVID-19 in China. Although China was the first major country to detect the epidemic, the global perception of China's COVID-19 performance was very low in 2021. In 2022, China earned the 19<sup>th</sup> highest ranking of 5.4 on COVID-19 Response in the Index. This is a big and significant improvement from last year's rating of 3.7. China's rating is likely boosted by the distribution of Chinese-made vaccines to many non-Western nations for free – using economic hard power to leverage soft power benefits in some countries.

## Innovation

Since 2013, China's ranking in the "Global Innovation Index" report released by the World Intellectual Property Organization has risen steadily for 9 consecutive years and is currently ranked 12<sup>th</sup> – a ranking in part based upon the value of the nation's brands as assessed by Brand Finance. As a developing country, China ranks first in the world in nine indicators including patent applications, trademark applications, industrial designs, high-tech exports, creative product exports and domestic market size. This fully confirms the fact that China's soft power in the field of technological innovation and intellectual property protection is constantly growing. This is reflected in the Index's increased evaluation of China on 'products and brands the world loves' which increased by a remarkable +2.2 points from 5.7 in 2021 to 7.9 this year.

## The Winter Olympics

In cooperation with the international community, the Beijing Winter Olympics 2022 received notable praise from the International Olympic Committee and the participating athletes. The successful completion of the Winter Olympics has allowed the world to see a more confident, self-improving, and tolerant China. This helped to boost China's rating on 'leaders in sports' from 2.7 to 3.0, an increase in ranking from 15<sup>th</sup> last year to 10<sup>th</sup> globally this year.

## Brands

China's soft power is also reflected in many other things, from various types of

cooperation in outer space technology to the increasing tendency of more Chinese people using domestic brands with more competitive quality and price in their daily lives. Over the past decade, Chinese brands have outperformed international peers in Brand Finance's brand value rankings, with their total value increasing nearly tenfold, and many brands have dominated certain industries for several years now. The picture of China's soft power changes will continue to unfold through more Chinese products becoming Chinese brands as global competitors and then global leaders in time.



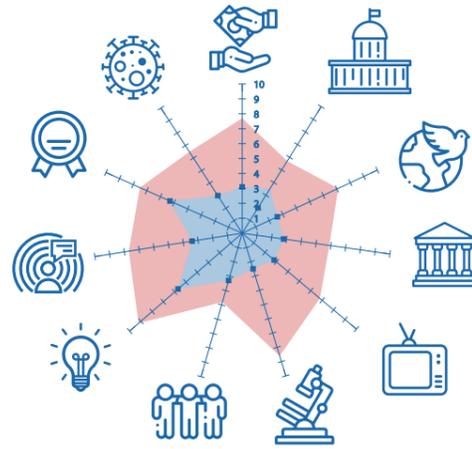


Colombia's performance compared to best in class per pillar  
 ● Best in Class ● Colombia's Results

# Colombia

Rank #48 ↑ #52

Score 34.7/100 +1.2



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**Laurence Newell**  
 Managing Director,  
 Brand Finance Americas

According to the Global Soft Power Index 2022, Colombia achieved remarkable growth over the last year, jumping up 4 spots to become the 4<sup>th</sup> ranked nation in Latin America. Colombia has also scored well across the soft power metrics, outperforming its neighbours in Business & Trade (ranked 4<sup>th</sup>), International Relations (ranked 6<sup>th</sup>), Governance (ranked 9<sup>th</sup>), Media & Communications (ranked 5<sup>th</sup>), and Education & Science (ranked 7<sup>th</sup>).

The nation continues to be regarded as a leader in its food and other products, which were commended by respondents around the world. Alongside this is Colombia's rising influence around the world, with the nation being highly regarded as helpful to other countries, reflected in a 0.4-point rise in the International Relations metric. Colombia's domestic issues have also contributed to its improved performance this year, reflected in the nation's Governance score rising by 0.1 points. Within this metric, global perceptions of Colombia's ethical standards, safety, human rights

laws, and corruption have improved year-on-year.

Aside from this, the nation's improved score for its handling of the COVID-19 pandemic contributed to its strong performance, as Colombia contained the spread of the virus efficiently and the economy began its recovery.

Over the last year, Colombia's scores for Influence and Familiarity rose by 0.8 and 0.6 points, respectively, as the nation took its place as the 4<sup>th</sup> most influential and 5<sup>th</sup> most familiar nation in the Latin America and Caribbean region. Starting off the year with this firm footing, Colombia remains poised for further success in terms of perceptions of its soft power in the coming year, particularly considering its commitment to Environmental, Social, and Governance (ESG) initiatives. As part of this strategy, Colombia has committed to becoming a regional leader in hydrocarbon production, as the nation continues to prioritise and invest resourced to meet its goal of oil and gas self-sufficiency by 2028.

# Interview with ProColombia



**Flavia Santoro**  
 President,  
 ProColombia

**Colombia is in the top 4 nations in Latin America in the Brand Finance Global Soft Power Index 2022. How has Colombia grown its reputation as an influential nation, especially in the wake of COVID-19?**

Colombia has a favourable reputation thanks to its economic growth and its ability to face external circumstances, along with legal security, stable macroeconomic indicators, a highly qualified workforce, and access to global markets. We are also showing the world a country that is a safe, reliable, sustainable, and a high-quality business destination, based on principles such as innovation and trust.

President Iván Duque's leadership and commitment to promoting Colombia in distinct international arenas has driven the arrival of new projects, reinvestments, and strategic partnerships with Colombian companies, as well as other initiatives that have transformed and are transforming Colombia with opportunities for skilled labour and technology transfer, thus contributing to competitiveness.

We have a comprehensive country promotion strategy that is implemented from ProColombia offices throughout the world. This has allowed us to coordinate our opportunities and potential with the interests of investors and buyers in various markets. In this effort, we are supported by the Ministry of Foreign Affairs and the Colombian Embassies through the CO-nectados initiative.



**Colombia is known for its vibrant products and warm people. What role do your people and their values play in your national identity, and how do you communicate them abroad?**

Making visitors feel at home is easy in Colombia, since warmth, service and empathy are part of our DNA. That is why last year we launched a new brand manifesto inspired by our people, and we called it, 'Colombia, the most welcoming place on Earth'.

It was the result of a quantitative and qualitative investigation of Colombians and visitors through more than 1,500 surveys and focus groups. The studies discovered the essence of the Colombian people - their warmth and kindness - which were evident and the clear evidence that allowed us to design and validate the manifesto.



It is a long-term message that will be leveraged in our communications to inspire future business and leisure travel, foreign investment, and strengthen export promotion. The manifesto gives us the opportunity to convey a coherent message to the world about our country and, most importantly, about our people

**As a leading country for food and its products, what is the importance of sustainability and quality when it comes to nation brand building and communications?**

It is very important. We promote Colombia as a sustainable and high-quality destination for business. In tourism, for example, our country has led major projects such as the Sustainable Tourism Policy and the General Tourism Law, both focused on strengthening the sector from a responsible perspective and retaining natural and cultural wealth. Colombia is amongst the 12 countries in the world that has developed a public policy to promote sustainability.

At the end of 2020, the Ministry of Trade, Industry and Tourism achieved two main projects to promote best practices that conserve and protect Colombia's natural and cultural heritage through responsible tourism, a development that ProColombia helped push through. These are: the General Tourism Law, placing sustainability at its core, and the Sustainability Policy.

This has made a positive impact on the economy. Last year, tourism generated more than US\$3.1 billion in income for Colombia. This is 59.5% more compared to 2020.

Sustainability is also the central focus of foreign direct investment attraction, considering that Colombia is the most bio-diverse country per square meter in the world. During 2021, FDI inflows to the South American market reached over US\$ 9,4 billion, 26% more compared to 2020.

For years, Colombia has been characterised as one of the countries with the greatest political stability in Latin America, is one of the 30 countries that attracts the most investment globally, and is the third largest investment recipient in Latin America, according to the United Nations Conference on Trade and Development (UNCTAD).

Furthermore, the International Monetary Fund has forecast that the Colombian economy will remain buoyant, and that it would top the region regarding growth, which will expand by 5.8%, according to the latest projections.

Exports are on a positive trail as well. In 2021, Colombia achieved the largest non-mining exports to date, reaching over US\$18,1 billion, 24.5% more as compared to 2020 and 18.7% as compared to 2019.



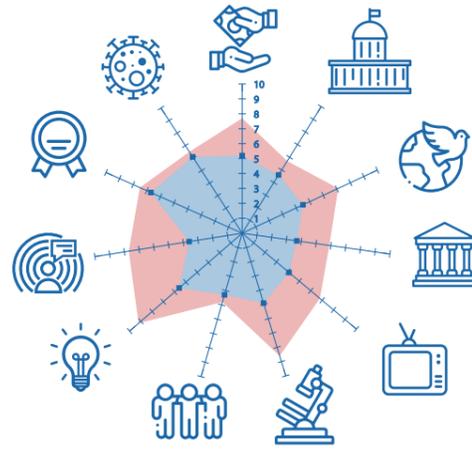


Finland's performance compared to best in class per pillar  
● Best in Class ● Finland's Results

# Finland

Rank #25 ↓ #18

Score 47.1/100 -1.2



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## Finland registers its highest score in the Global Soft Power Index 2022 for acting to protect the environment. What does it take to move from talking to doing when it comes to climate action?

The core of Finland's country image work is: Actions, not words. Finland has an ambitious climate policy. The goal is to be climate-neutral by 2035, and the world's first fossil-free welfare society. However, the fact is that no country can resolve the climate crisis on their own. This is why we want to talk about climate collaboration. Our message is, "Change may seem inconceivable, but only until we act." Every major challenge in history has seemed almost impossible, but only until people have started to take action and create solutions to the problem at hand. We need innovations and a collaborative mindset. Finland has plenty to offer – recycling textile waste, creating protein out of thin air, making batteries from wood fibre – but to achieve change on a global scale, we need to act together, network and find new partners. Finland wants to join forces with others to change the future.

In recent years, we have started to use our embassy network as a platform to highlight people doing important work to promote equality around the world. Our embassies have been thanking individuals and organizations who are fighting to make their surroundings more equal. This has given us a possibility to support equality work, call attention to the topic and start a dialogue.



## Governance and People & Values are two of Finland's strongest pillars of soft power. Although many people would consider a society built on equality to be a utopian vision, it seems to come quite naturally to Finns. What role do values play in your national identity, and how do you communicate them abroad?

Our country image work is value-based. Equality is a core value for Finns. Promoting equality globally is also a key foreign policy goal for Finland. But just telling people that Finland is committed to equality won't cut it. You need to take action to get the message across and make a difference – and making a difference is what Finland is interested in.

### While some governments are still setting up their nation branding infrastructure, Finland can be proud of the many initiatives the Finland Promotion Board has coordinated. How can understanding the perceptions of your nation brand help direct your storytelling efforts?

We have a strategic approach when it comes to our country image work. We prioritise themes, focus on actions, define target groups and work towards long-term goals under the umbrella of the Finland Promotion Board. The network consists of representatives from public administration bodies, the private sector and the third sector. We set annual key themes and priorities

to guide the country branding efforts of our embassies. We also produce common messages to help with communications needs.

Our activities are based on our Country Branding Strategy and information from different studies. For example, we place a lot of emphasis on climate communications because sustainability is a priority in our strategy, and research shows that it's also something Finland is known for. Studies also inform what we devote our attention to on a smaller scale. For example, surveys tell us that people are not familiar with Finnish city life. Based on that information, it's easy for us to add urban aspects to our communications materials across the board.



**Laura Kamras**  
Director for Public Diplomacy, Ministry for Foreign Affairs of Finland





France's performance compared to best in class per pillar  
● Best in Class ● France's Results

# France

Rank #6 ↑ #7

Score 60.6/100 +5.3

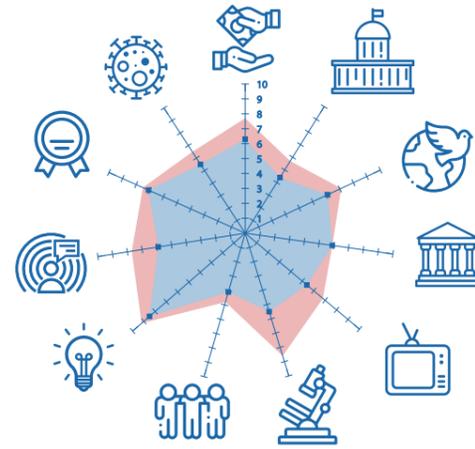


**Bertrand Chovet**  
Managing Director,  
Brand Finance France

France's Global Soft Power Index climbs to 6<sup>th</sup> place globally, with a score of 60.6, up +6.7 points from last year, overtaking Canada and Switzerland, respectively 7<sup>th</sup> and 8<sup>th</sup>. France nevertheless recorded weaker growth than some of its peers in the recovery from COVID-19, such as United States (+15.6), China (+11.0), United Kingdom (+8.5), but higher than Germany (+4.5) and Japan (+4.4).

France still has a high level of familiarity, ranked 3<sup>rd</sup> in the world. Although growing slightly, its global influence remains below the great powers of USA, China, and the UK which are progressing more rapidly. Like the United Kingdom, Germany and Japan, France's reputation is relatively stable while the United States and China are back to their pre-crisis level.

This year, we note a very strong increase in Business & Trade attractiveness (up +0.5 from 5.7 to 6.3), the result of the actions and reforms carried out under the Macron presidency. The fundamentals are strengthened with the global perception of French products and brands is improving. Looking ahead the 'France 2030' plan seeks to bring out future technological champions and support transitions (decarbonization, green hydrogen, sustainable mobility, healthy food, seabed, etc.) in sectors of excellence to contribute to economic



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competitiveness. On the other hand, France has improved 'easy to do business in and with' to a rating of 4.5, up from 3.9 prior to the pandemic. Each of these perceptions mark a turning point in the perception of the strength and stability of the French economy.

In 2022, France is also progressing in the Media & Communications fields, particularly in the influence of its media which increased its rating significantly from 5.1 to 7.2. The same applies to Education & Science where France improved its brand across all areas: as 'a leader in science', having a 'strong educational system' and being the home of 'innovative technology and tech companies',

The areas of decline are Culture & Heritage and Governance. On Culture, while France sees its influence on arts, entertainment and food improve significantly, its rating on Sport reduced this year. As a result, France was rated as having the 6<sup>th</sup> most 'appealing lifestyle' in the world.

On Governance, the perception of respect for laws and human rights remains below the pre-COVID-19 level, while France's reputation for having 'respected leaders' improved from 9<sup>th</sup> to 5<sup>th</sup> place. This is largely due to Emmanuel Macron's global leadership on a number of important global issues.



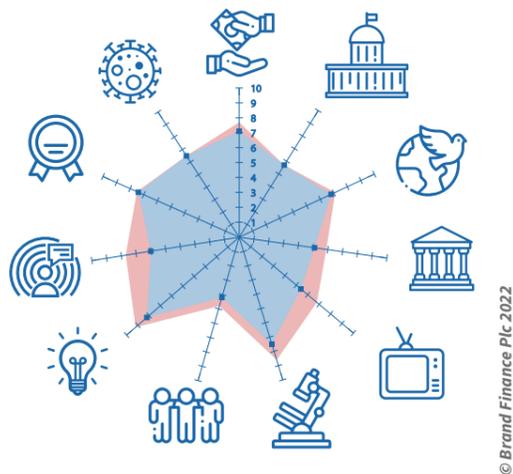


Germany's performance compared to best in class per pillar  
 ● Best in Class ● Germany's Results

# Germany

Rank #3 ↓ #1

Score 64.6/100 +2.4



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**Ulf-Brün Drechsel**  
 Managing Director,  
 Brand Finance DACH

Germany's rank fell in the Global Soft Power Index, moving from 1<sup>st</sup> to 3<sup>rd</sup> overall, mainly due to the very strong recoveries and improvements of the USA and UK. The overall scorings for Germany are still very stable and high, with KPI results showing an improvement in Governance (1<sup>st</sup>) and People & Values. Its COVID score also improved again.

For Germany, this is a year of significant inner political changes with a national election and Angela Merkel stepping away from the political stage. In 16 years of consecutive governmental leadership in Germany, Angela Merkel acted successfully not only as a major brand ambassador for Germany, but also as the dominant political player in the EU. She became the face and voice of Germany and was well received as an always balanced and moderating authority in managing political polarising issues.

Her political retirement is a big loss and a risk, not only for the German nation.

However, the scorings for Germany in our Soft Power Index even improved slightly. Germany continues to be seen as one of the most influential nations. That is proven evidence for a strong equity and perceptual trustworthiness as a reliable and strong country. But another much more historical and game changing fact took place end of last year with a disruptiv political change in Germany. The newly installed government switched from the long-standing social and conservative Party coalition to a coalition of red, green, and yellow politicians. The so called 'Ampel Regierung' (traffic light government) has been in place since November 2021 and already announced a new political mission and agenda to significantly push developments forwards and improve the deficits which had been identified during



the exceptionally but still ongoing pandemic crisis and environment.

Germany will put heavy investments in infrastructure, digitalisation, education, the stabilisation of pensions and, most importantly, in a sustainable climate-caring Green Economy, including a much stronger funding of the development of e-mobility and the renewable energy, technology industries including infrastructure.

Another historic decision has been just recently made when Russia began its invasion of Ukraine. The German Government decided to reconsider its very passive and minimal impact Military Defence Policy. The government approved an EU€100 billion investment towards enlarging,

modernising, and reinforcing the German Army and Military Forces. This is truly a paradigm change for Germany. An especially crucial step against longstanding conventions and towards reconsidering a new role and responsibility for Germany in the NATO and in the world. 2022 and the years after will bring dramatic changes and a historic transformation to the nation. The economy is still strong and recovers quickly. The society is becoming increasingly multinational, diverse, and demanding. We experience particularly challenging and interesting times in Germany, where history meets the present day, and where the present time creates history. We will see next year how this will have an impact on the GSPI Ranking for Germany.





India's performance compared to best in class per pillar  
 ● Best in Class ● India's Results

# India

Rank #29 ↑ #36

Score 43.2/100 +5.6

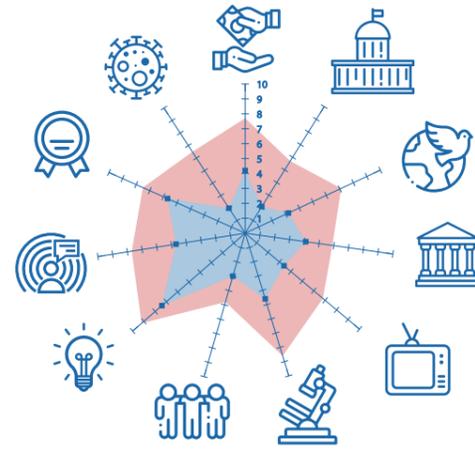


**Ajimon Francis**  
 Managing Director,  
 Brand Finance India

India's soft power is like a river flowing down from the Himalayas. It is understated at times, gentle mostly, displays power when situations demand and carries itself with elegance through the tumults of time.

With India earning a ranking of 29<sup>th</sup> in the Global Soft Power Index, the river is as wide, quiet and calm as a lake. India exerts its soft power very gently, but is prominent in a number of fields: From being the world's largest democracy to its spectrum of cultural and linguistic diversity to its moral doctrine of non-violence of Mahatma Gandhi, to its biggest non-monetised global export of Yoga, Spiritualism, to its Classical Music and Dance, to the millions who come to India every year for its Holistic healthcare, to its delicious and flexible cuisines enjoyed globally as curries and to its loud Bollywood known over the world.

Behind the scenes, India is today the world's most powerful IT factory, earning it a strong rankings for science and technology. Indian IT firms lead the way in providing digitisation for the world going through pandemic. From its limited reserves, India finds a way to help other countries in healthcare – both in terms

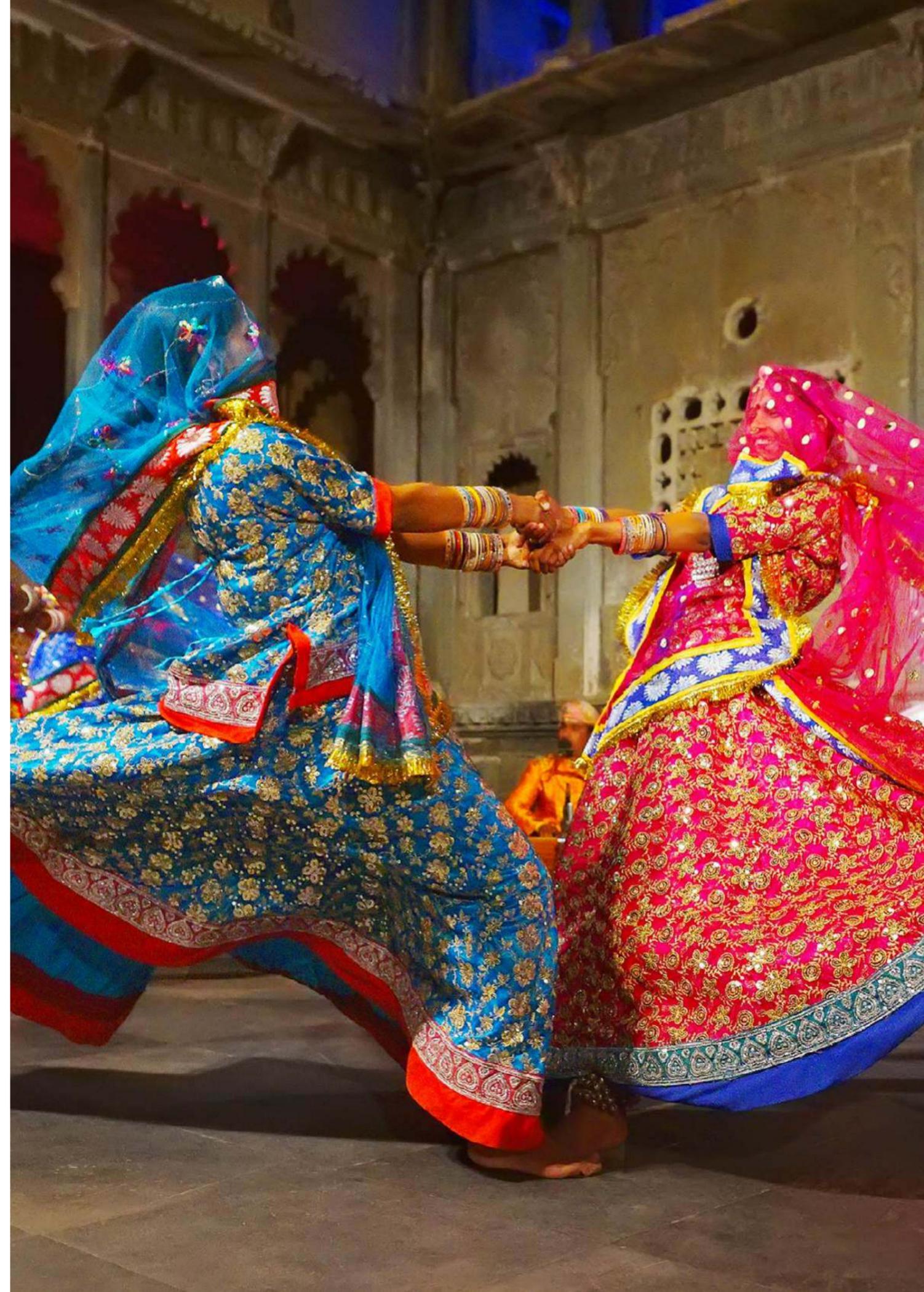


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of hard power (vaccines) and soft power (healthcare professionals).

With its dependence on world resources, India found a way to remain balanced in a polarised world of geo-politics, and earned a decent rating of 4.2 for 'good relations with other countries'. During the polarised Cold War of the 20<sup>th</sup> century, India led the non-aligned movement, but India will struggle to play a similar role. The first 20 years of the 21<sup>st</sup> century saw extensive conflict to its west in Afghanistan, there is currently significant conflict to its north in the former Soviet republics, and there is the future risk of conflict to its east with China. Indeed, last year a number of Indian troops died in a military conflict with China in the Himalayan mountains. These tensions will be challenging for a democratic India to navigate.

This is a country which cherishes innovation and at the same time develops cutting edge block-chain technology. India is yet to showcase itself on a global stage. Perhaps it does not need to. In the long run, the world will notice the gentle flow of this nation's ability to show it is okay to be understated and calm like a lake.



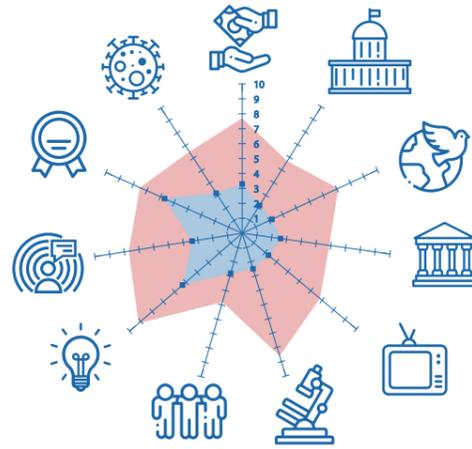


Indonesia's performance compared to best in class per pillar  
 ● Best in Class ● Indonesia's Results

# Indonesia

Rank #47 ↓ #45

Score 34.8/100 +0.5



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**Sutan Banuara**  
 Managing Director,  
 Brand Finance Indonesia

Indonesia is a country with the 16<sup>th</sup> largest economy in the world, the 4<sup>th</sup> largest population in the world, and a total of 278 million people who are currently enjoying a demographic bonus with strong population growth – yet ranked just 47<sup>th</sup> on the Global Soft Power Index. Indonesia has very diverse natural wealth across both mining and agriculture, becoming the largest producer of crude palm oil in the world, surpassing Malaysia, and the 3<sup>rd</sup> largest coal exporter in the world after China and India. Given the nation's strong hard power metrics by sheer fact of its huge population, the nation has a strong basis to grow its soft power in the future.

One possible opportunity is the global movement towards electrification, which will likely require substantial battery usage across the world. A key ingredient for modern batteries in nickel – and Indonesia is estimated to have around 52% of the world's known nickel reserves. The Indonesian Government is seeking to develop a domestic battery industry with a view to using the significant nickel reserves, and in doing so, upgrade its rating as 'a leader in science' from a very low 1.8.

In the tourism sector, Indonesia obtained a 5.7 rating as 'a great place to visit', a significant upgrade from last year's rating of 4.9. This places Indonesia between significant tourism destinations in Iceland and South Africa, and reflects Indonesia's ability

to attract tourists to beaches, visitors to UNESCO world cultural heritage site Borobudur temple, and business travelers to its growing economy.

The Indonesian Government seeks to develop its tourism industry by continuing to develop Top 5 super priority destinations, such as: Lake Toba which is the largest volcanic lake in the world, Mandalika, Likupang, Labuhan Bajo and Brorobudur Temple to provide a variety of tourist destinations for domestic and foreign tourists to complement and expand beyond Bali, which has been a world-class tourist destination for a decades.

The government's response to handling COVID-19 is rated better than average for all countries, correlated with the administration of 114 million recipients of full-dose vaccines. Indonesian scientist Carina Joe contributed as one of the researchers behind the Oxford Astra-Zeneca team, and in doing so, helped to build the Indonesian nation's brand as 'a leader in science'. With a rating in that area of just 1.8, there is still a lot of work to be done in this area.

With so many valuable tangible and intangible assets and great potential to be developed, why is Indonesia ranked as only 47<sup>th</sup> out of 120 countries? This is certainly a lot of work remaining for the Indonesian government to improve the ranking of the Global Soft Power Index. While hard power developments



around economics, infrastructure and natural resources are important, the Indonesian government will need to go beyond building mass infrastructure development programs to manage integrated public communications and campaigns

so that the perceptions reside in the mind of the stakeholders (entrepreneurs, investors, visitors, tourists, students) of the nation brand are aligned with the goals of the Indonesian nation to take its rightful position as a global competitor.



Ireland's performance compared to best in class per pillar  
 ● Best in Class ● Ireland's Results

# Ireland

Rank #30 ↓ #29

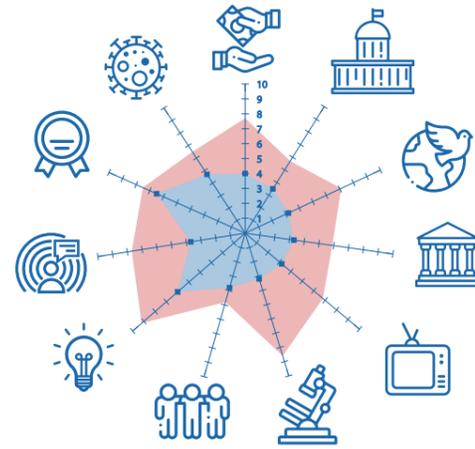
Score 41.9/100 +1.3



**Simon Haigh**  
 Agent,  
 Brand Finance Ireland

In the Brand Finance Global Soft Power Index 2021, we stated that: “Irish people are still considered to be among the most generous, fun, and trustworthy, indicating that a boost in the nation’s soft power may be in order as borders reopen and people are once again able to enjoy the famous Irish hospitality”.

Two days after our Global Soft Power Summit 2022 is St Patrick’s Day. Every St Patrick’s Day, Ireland’s Ministers take part in a long-held Irish custom – they are sent to all corners of the globe to evangelise Ireland on the world stage. This year, the Taoiseach (Irish Prime Minister) will, as always, head to the United States, while the 2022 St Patrick’s Day programme will see a further 32 visits abroad by senior and junior ministers across North, Central, and South America, Europe, India, Asia, and Australasia. They are doing this to represent a nation of 5 million people, but also the 80



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million or so people around the world claiming Irish descent.

Ireland has a long history of global flows of people, knowledge, and money. There are thousands of Irish organisations around the world connecting back to Ireland while enabling cross-cultural interchanges. Ireland constantly develops relationships around the world whether it be for business, sport, culture, education, tourism, or other activity. Ireland is seen as a world leader in these spaces.

Given the current global geo-political challenges, Ireland’s role as a global leader for diaspora engagement and cross-cultural co-operation is clear and remains extraordinarily strong indeed. Ireland’s soft power welcomes the world at home and travels to the corners of the world. It could, and should, in these troubling times, be seen as a benchmark soft power for diaspora engagement and better cultural understanding.



# Interview with Tourism Ireland



**Mark Henry**  
 Central Marketing Director,  
 Tourism Ireland



## How do you leverage soft power to enhance your own story telling for Ireland’s tourism?

Ireland is a small country with a population of just five million. But it has a diaspora of people with Irish heritage that number in the many tens of millions around the world. That helps to give our soft power global reach.

Tourism Ireland, with the support of Ireland’s Department of Foreign Affairs, turns the world green on March 17<sup>th</sup> every year. We illuminate several hundred buildings in dozens of countries in our national colour on our national day. This Saint Patrick’s Day ‘global greening’ costs us next to nothing – buildings line up to voluntarily join the initiative – but it gives the entire world cause to think of Ireland for one day of the year.

Saint Patrick’s Day also offers our government an opportunity for global reach. Thirty-three government ministers and junior ministers will travel the world this year to represent Ireland’s interests to the leaders of other nations. While there, they will engage with the diaspora and host functions for the travel trade – all of which helps to amplify Ireland’s story and grow interest in visiting.

## Which nation brand perceptions are particularly important for your tourism industry?

The latest Global Soft Power Index study shows that People & Values remain a core brand strength. The Irish are appraised strongly for their fun, generosity, and trustworthiness.

Although Tourism Ireland’s research shows that these strengths are rarely a reason to choose Ireland for your holiday destination, engaging with the people during your stay hugely enriches your holiday experience and the positive word of mouth it engenders is one of the strongest tourism assets that we have.

## What is the benefit of understanding the perceptions of Ireland’s nation brand?

A comprehensive brand analysis enables the identification of sources of competitive advantage. The country can pinpoint the strengths to leverage in communications to potential visitors, and in competitive pitches for trade and investment.

Of course, it equally identifies where nations are relatively weak. It, therefore, offers guidance to astute policymakers on the areas of action required to improve national perception. Albeit that takes a lot of time and a good deal of policy consistency.

We’re all better off for knowing than not.

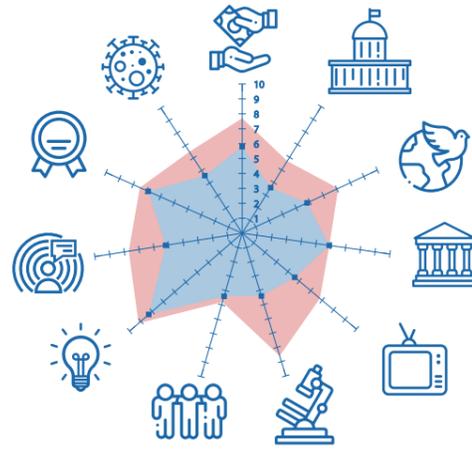


Italy's performance compared to best in class per pillar  
● Best in Class ● Italy's Results

# Italy

Rank #10 ↑ #19

Score 54.7/100 +6.4



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**Massimo Pizzo**  
Managing Director,  
Brand Finance Italy

Italy enters the top 10 of nations with both the greatest soft power in the world and among those that have improved the most year on year, according to the Global Soft Power Index 2022. After the decline from 11<sup>th</sup> to 19<sup>th</sup> place last year, this year Italy gains nine positions to claim 10<sup>th</sup> place. Italy's current soft power is consistent with its economic power, in fact Italy is the 8<sup>th</sup> nation by GDP in the world.

Last year's drop in rank was largely due to the dramatic images from Italy which spread around the world in 2020, following the outbreak of the pandemic. At the time, Italy suffered the misfortune of being the first major Western country affected by COVID. A country that initially did not seem able to react effectively.

In the following year, the country reacted with great determination and improved its management of the pandemic, achieving great success. 2021 was a special year for Italy, as The Economist magazine decreed Italy the country of the year. In fact, Prime Minister Mario Draghi and his government contributed to the strong recovery of the economy.



The victory in the European football championships, the final at Wimbledon, the good performances at the Olympics, and the success of Maneskin at Eurovision have further contributed to Italy's soft power around the world.

This strong recovery is reflected in the improvement by 6.4 points in the Global Soft Power Index 2022. Only the USA, China, and the UK have performed better than Italy. On the other hand, this year's record recovery follows last year's collapse. These strong variations indicate that the Italian nation brand is not as solid as it should be. It is subject to events rather than the identity of the country. In fact, in the Brand Finance Nation Brands report published every year in the autumn, Italy regularly ranks lower on brand strength than both its traditional competitors and much smaller nations such as Belgium, Ireland, or Austria.

The current push given by Prime Minister Mario Draghi, and the great desire of Italians to contribute to the country's development, will certainly strengthen the nation brand more and more.

# Interview with Parmigiano Reggiano



**Nicola Bertinelli**  
President, Consortium of  
Parmigiano Reggiano



## How do you leverage Italy's soft power as a leading country for food to enhance your own story telling?

Made in Italy has always been a guarantee of quality in various sectors: fashion, automobiles, tourism, food and wine, and lifestyle. This renowned reputation has been built over thousands of years. In the agri-food sector, the passion of our artisanal producers has shaped incredible Geographical Indication products that are now known all over the world. One of these is Parmigiano Reggiano, which was invented by monks in medieval times and then developed by generations to the present day. Little has changed since then, as still today the cheese is produced with only three ingredients (milk, salt, and rennet), without additives and preservatives, and with a production technique that is almost identical to that from centuries ago. Parmigiano Reggiano is therefore one of those products that have contributed to shaping the fame of "Made in Italy". We can consider it a very long-term investment, which was started nearly 1,000 ago, and which today brings value to our country and to Parmigiano Reggiano.

## How does Parmigiano Reggiano enhance Italy's reputation within their trade relations and global marketing strategies?

The promotion of Parmigiano Reggiano has always been focused on communicating the values of the product and the underlying brand: environment, territory, animal and human well-being, and nutritional qualities of our cheese.



To this end, communications and press agencies have been activated in 16 foreign countries, and we collaborate directly or through the main exporters with the major world distribution chains.

This allows us to have contact with many people, governmental and non-governmental organisations, entrepreneurs, trade associations, and other Consortia. A really long list! These meetings obviously have a positive effect on the reputation of our country because it is impossible not to fall in love with Parmigiano Reggiano. And I am not referring only to the taste and its nutritional qualities, but also to its millenary history and the Area of Origin which attracts hundreds of thousands of tourists every year. This tourist flow generates value not only for the dairies but for the whole region.

In 2021, the Parmigiano Reggiano supply chain generated a value of €1.7 billion for our dairies and our breeders, a community of about 50,000 people spread over the provinces of Parma, Reggio Emilia, Modena, and a part of Bologna and Mantua.

**Italy has a rich heritage and culture, which is well-known across the world. This is helped by several protected and authentic products made in Italy. What role does having a PDO status play in Parmigiano Reggiano's reputation among key stakeholders?**

The system of European PDOs was fundamental to provide common rules recognised all over the world. For producers, making a Geographical Indication product means respecting strict quality and traceability parameters, but also having the right recognition for their work, as well as legal protection that extends to the entire European Union and to other states in the world.

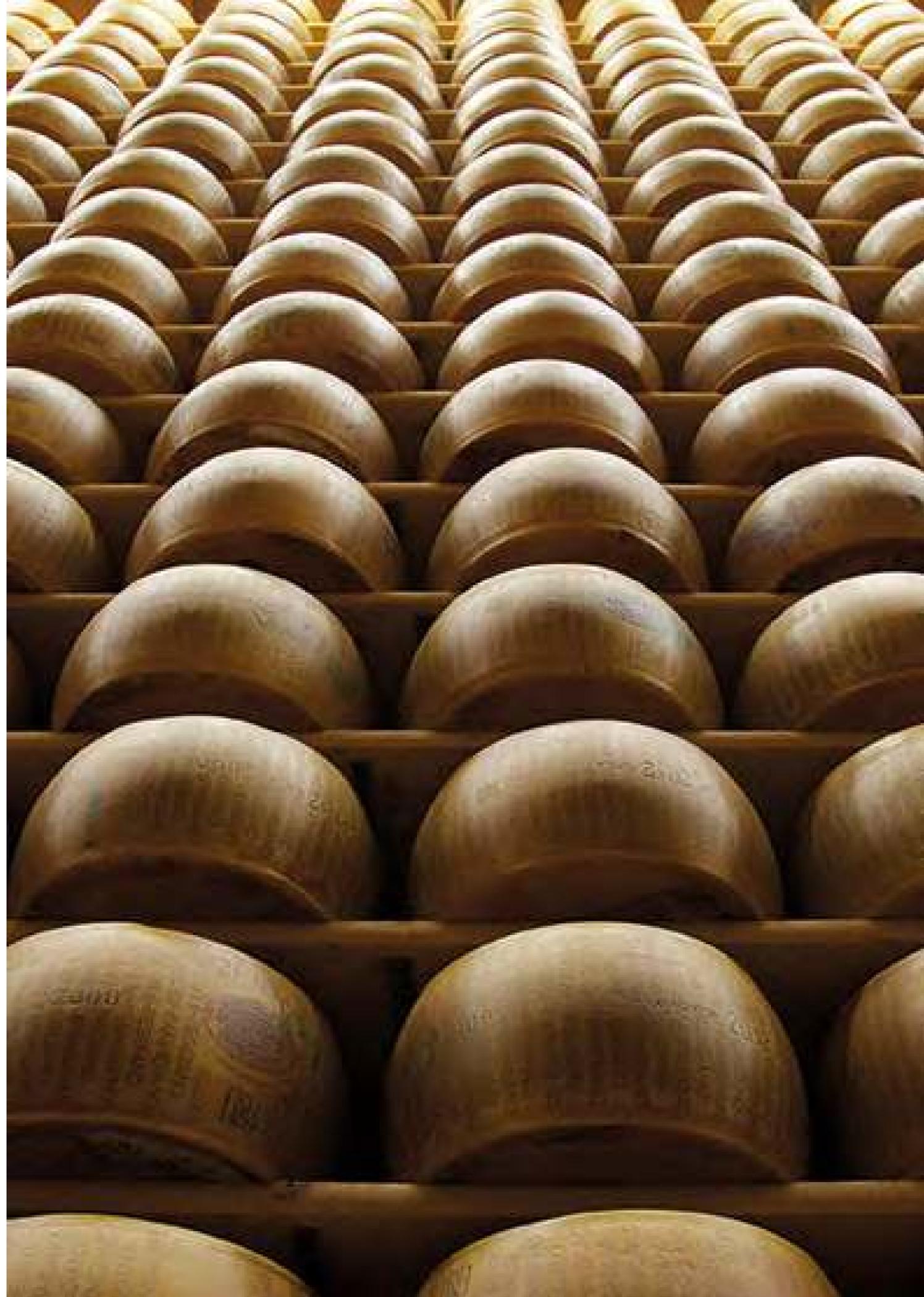
For consumers and stakeholders, the symbol of the PDO (Protected Designation of Origin) is a distinctive element that immediately provides numerous and essential pieces of information about the product: firstly, where it comes from – the Area of Origin, secondly, its link with the region, thirdly, that it is produced with artisanal techniques, and finally that it has a proven history.

So, to bear the designation “Parmigiano Reggiano PDO”, the cheese must be made adhering to strict rules. It must be produced in the Area of Origin, which includes the provinces of Parma, Reggio Emilia, Modena, Mantua to the right of the Po River, and Bologna to the left of the Reno River – a surface of approximately 10,000 km<sup>2</sup>.

Parmigiano Reggiano is so strongly bound to its Area of Origin that no other place in the world can produce the same product – even if the same production techniques were used.

Going back to the point of counterfeiting, using the term ‘parmesan’ to broadly describe non-Italian hard and grated cheeses is not compliant with the production specifications of Parmigiano Reggiano, and is in direct violation of the EU’s Protected Designation of Origin. In 2008, the European Court of Justice made a decisive ruling that only cheeses bearing the PDO “Parmigiano Reggiano” can be sold under the denomination “parmesan”. This was also a victory for consumers who receive a strong guarantee or traceability and will be free from misleading denominations on the market.

Unfortunately, the laws that classify and protect Parmigiano Reggiano within the European Union are diluted overseas, opening the door for misusages of the term and imitation cheeses within the United States and other countries.



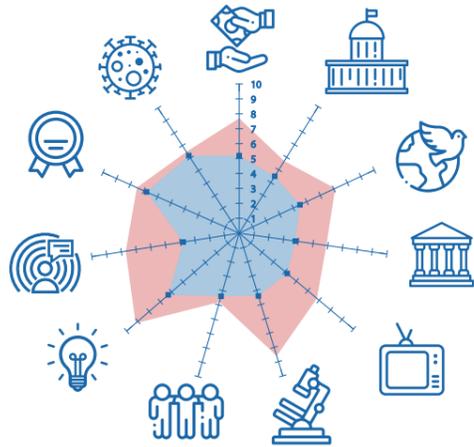


New Zealand's performance compared to best in class per pillar  
● Best in Class ● New Zealand's Results

# New Zealand

Rank #21 ↓ #16

Score 48.4/100 -0.9



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David Downs  
CEO, New Zealand Story



**New Zealand has been praised for its approach to the pandemic. It registered the world's highest score for COVID-19 Response in 2021 and even managed to improve further year on year. What are you doing right that others may have got wrong?**

From the outset of the COVID-19 pandemic, our response has had some key features:

- + Science / health led – our politicians have relied on the science, and trusted in the data.
- + Clear communications and leadership – although we didn't always like it, we were usually very clear on what was happening. Our

Prime Minister led from the front, often being main spokesperson to the public.

+ Values based – perhaps more esoterically, our COVID response has largely been in line with some of New Zealand's core values, particularly about how care for people is paramount.

We didn't get it all perfect, but largely the COVID response has proven to be very effective. Our fatalities per capita were just 11 people per million – over 100 times lower than some other countries. We're acutely aware of the sacrifices others have had to make, and grateful that we were able to learn from the work of others, and benefit from the vaccines we received.



**As the country is coming out of the pandemic and opening up its borders to welcome international travellers after a two-year break, what does tourism mean to brand New Zealand?**

Tourism has historically been one of New Zealand's top export earners, with 11 million people visiting us in 2019 – that's more than double our population. In many ways, that was causing significant issues and pressure on our infrastructure, and we are using this reset as an opportunity to build back better, and think more about the type of visitors we would most like to welcome here. The well-known Kiwi hospitality will always be there, but we also know that we have to balance the need for tourism dollars with having a sustainable impact on our environment – a key reason people come here in the first place.

**New Zealand is one of those nation brands which are very much punching above their weight in terms of soft power. What advice would you give to other nations of a similar size that might be struggling to make their story heard?**

New Zealand knows that we have to use influence to impact world affairs. As a relatively small, developed country, our impact is through demonstrating leadership where we can, and being part of the global community. We benefit when everyone plays by the rules, so it's in our interests to do the same, and to uphold international relations in a responsible and mature way. One lovely compliment we were paid as a nation was from Jack Ma, founder of Alibaba, who said that New Zealand isn't just good IN the world, we are good FOR the world. That is a great description of how I think about our possible impact. We aspire to be a place where care for people, and a deep connection to our environment, is a key part of who we are – ideas with global appeal.





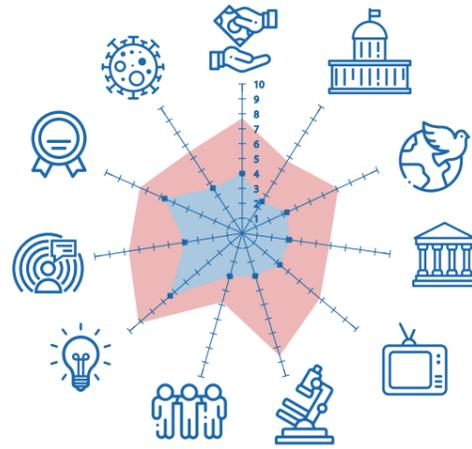
South Africa's performance compared to best in class per pillar

● Best in Class ● South Africa's Results

# South Africa

Rank #34 ↑ #37

Score 40.2/100 +3.1



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**Jeremy Sampson**  
Managing Director,  
Brand Finance Africa

There are some who argued that hard power was a thing of the past, but Russia is demonstrating that the days of hard power are far from over.

Political leaders around the world had convinced themselves that we could never return to tanks and boots on the ground and were caught off guard by Putin's invasion. Now, as Russia exerts its hard power capacity and Ukraine does its best to respond in kind, the rest of the world sits on the sidelines, watching with horror, applying what soft power it can.

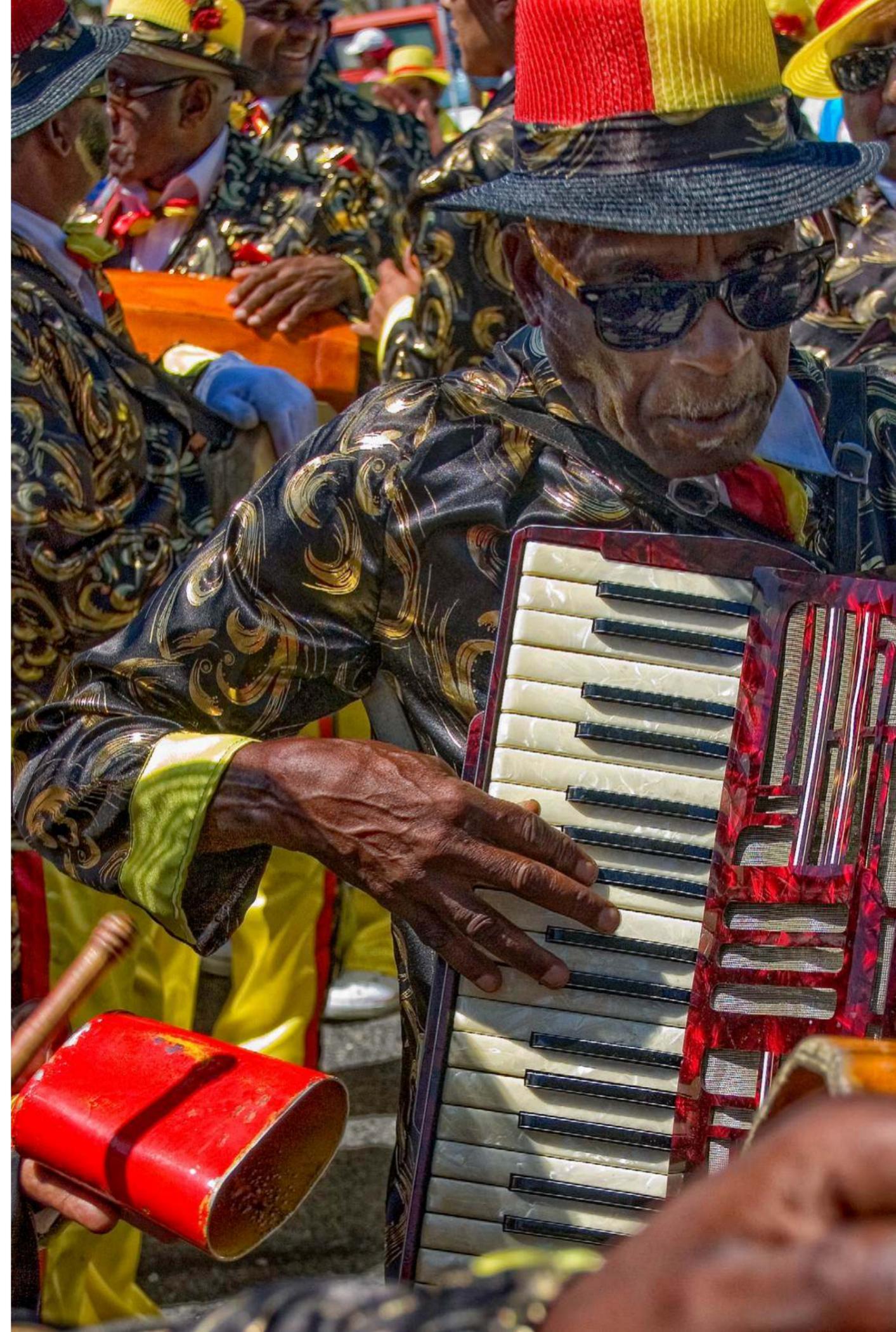
Russia is isolated in many ways: banking systems throttled, many international companies have ceased to operate, and personalities from opera stars to grand prix drivers banned, there have been demonstrations of support for Ukraine worldwide, including Moscow. Yet through diplomacy, investment, and control of strategic resources such as oil, gas, coal, and agricultural resources, Russia retains huge influence.

This is particularly apparent in Africa from how the individual countries at the United Nations voted on the Ukraine Declaration calling on Russia to withdraw its forces from Ukraine. Whilst the vast majority of countries voted in favour, it is illuminating that many other African nations were amongst the 35 countries who abstained. The enduring exercise of hard power across many parts of Africa is perhaps one explanation, but even peaceful South Africa was among the group.

South Africa's abstention has implications for its reputation and soft power. Many in South Africa are outraged at the ANC's decisions to abstain, but this reflects broader concerns about the ANC's impact on South Africa's reputation. Some 28 years after the first democratic elections the ANC, which sees itself as a party of liberation, is only just clinging to power. Many of its leaders act with an air of entitlement and corruption is rampant. At the moment, many are very disenchanted with government and the lack of positive action, resulting in many especially young professionals looking to emigrate.

On the other hand, South Africa may be on cusp of a soft power renaissance. Mark Cutifani the retiring CEO of mining giant Anglo American who spent many years here suggests the mood about South Africa is more positive outside the country than inside. As he has said to me, in life there are no challenges, only opportunities. Speaking as he presented the last set of financial results at Anglo earlier this month, he argued that the South African prospects are more hopeful than most: 'We operate in 40-50 countries...and when you look at the rest of the world, South Africa is a positive story'. Added to this, the next general election could see the ANC lose its majority which create an opportunity to refresh perceptions.

It is clear that in both Africa, and now in Europe, there remain many instances where hard power is alive and well and ever threatening. However, this makes it more important, not less, for nations to reaffirm their commitment to developing their own soft power and the principles that underpin it.



# Interview with Brand South Africa



**Sithembile Ntombela**  
Acting CEO,  
Brand South Africa



Inspiring new ways

**South Africa leads the ranking of Sub-Saharan nation brands in the Global Soft Power Index. It also has a significant tradition of moral leadership personalised by Nelson Mandela. What does leadership mean to South Africans and how can they help other African nation brands find their voice on the global stage?**

Visionary and collaborative leadership is at the heart of our regional engagement strategy. Key initiatives such as the South Africa Investment Conference (SAIC) and the AfCFTA, South Africa is working towards challenging the notion that it is the exception to the continent, when in fact it is a committed partner to attaining the collective goal of regional growth and prosperity.

As the oldest nation branding agency on the continent, Brand South Africa has been tried and tested in the area of effective reputation management and nation brand marketing. As we and the rest of the continent navigate through the storms of COVID-19, we have had to look to the potential of the AfCFTA in that it holds the promise of an autonomous Africa, which is both self-sufficient and fit for purpose. The pandemic showed us that, when all is said and done, Africa must unite, not only in the rhetorical sense but in all senses: economic, political, security, health, food security, climate, and technology. Also, as the youngest continent we have an obligation to future generations to actively change the growth trajectory so we can create an environment that is conducive to solution-driven innovation and sustainable growth, that is focused on social mobility and increased inclusion.

As Brand South Africa we understand the power of narratives and perceptions, it is for that reason that we are extending our knowledge and expertise to our regional counterparts. The success of the AfCFTA is directly linked to how Africans see themselves and how they use positive images and messaging to reach out to the rest of the region and by extension, the rest of the world. There is so much untapped potential in the region and in true African spirit – we remain true to attaining the hopes and dreams of our founding fathers of a united, peaceful, and prosperous Africa.

**‘Future growth potential’ is where South Africa registers its highest score. Turning that potential into economic benefits requires focused policies. What are the key industries that South Africa is currently investing in to lay ground for future growth?**

Some of the key milestones of South Africa’s Economic Reconstruction and Recovery Plan speak to Infrastructure and Innovation. With regards to Infrastructure, President Ramaphosa highlighted that a programme largely premised on Public-Private Partnerships would unlock investment in the sector with the goal of rebuilding world-class network infrastructure to boost aggregate demand. Additional incentive programmes include the Infrastructure Fund, where the Government of South Africa has pledged a commitment to use public funds to leverage private investment on a larger scale, by positioning “South Africa as a leading market for global business services, leveraging our unique strengths in customer service, broadband infrastructure, and expert skills”.

The COVID-19 pandemic showed South Africa and the region, that healthcare security is essential for a nation - and more so a region - to successfully navigate a health crisis. As a country, health crisis is a phenomenon that we are very familiar with, having dealt with some of the highest numbers of HIV/AIDS cases in the world. We had to not only gain the knowledge, but also work towards creating domestic solutions that ensure that we contain the virus and educate our citizens.

The HIV/AIDS crisis was slightly different than COVID-19 in that the fake news/misinformation phenomenon did not influence the public at the kind of level that it currently does. Various media platforms and social media drove a narrative that dangerously influenced global policy. For an emerging economy like ours, the goal was to use the lessons and structures we built in response to the HIV/AIDS crisis to successfully navigate through another health crisis. On the positive end of things, South Africa saw its innovation capabilities as a necessity to the region and the rest of the world. As such we, through initiatives like TRIPS, were able to look to our existing pharmaceutical manufacturing capabilities to step in and display the true potential that the region has. The collective good faith that was displayed by the international community was instrumental in ensuring that South Africa became one of the first countries in Africa to manufacture and distribute a COVID-19 vaccine.

The various endorsements from the World Health Organization (WHO) and the African Union (AU), provided the necessary buy-in for the rest of the region and world, to chart a new course for African self-sufficiency. It also showed the world our innovation capabilities through the well-established Aspen Pharmacare and Afrigen Biologics, and the newly established Biovac Institute, which is a public-private initiative. These projects will greatly aid

South Africa in our quest to become a hub of scientific innovation, research and development, especially in vaccine manufacturing for COVID-19, cancer, tuberculosis, and other potential pandemics.

**Brand South Africa has been following the Brand Finance rankings for many years. How does understanding nation brand perceptions help inform your marketing strategy?**

As the custodian of the South African nation brand, our primary mandate is to ensure that we understand how the country and by extension the nation brand is perceived. Perception by its very nature is driven by a set of ideas and narratives that are directly and indirectly created by particular events, dynamics, and characteristics. As such, it is our goal to firstly understand the drivers of those perceptions and work towards curating a narrative that seeks to shift the focus of particular perceptions. The work done through the Global Soft Power Index provides us with key insights into perceptions about South Africa – where to leverage and build on our strengths and where to implement interventions that will deal with our weaknesses, in a relevant and accurate manner. Simply put, research insights provide us with the analysis and interpretation of human behaviour and trends, so we may improve the effectiveness of our targeted marketing efforts.



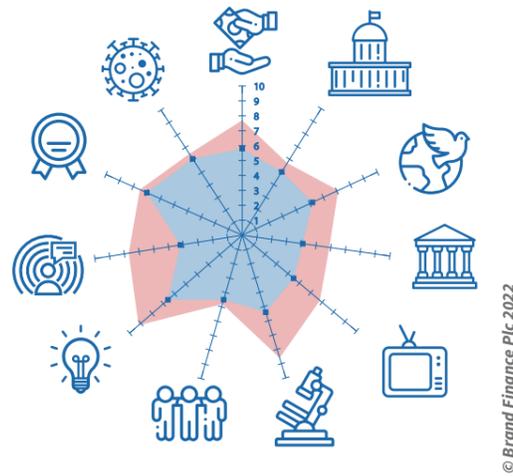


Sweden's performance compared to best in class per pillar  
 ● Best in Class ● Sweden's Results

# Sweden

Rank #14 ↓ #9

Score 52.3/100 +0.1



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**Anna Brolin**  
 Managing Director,  
 Brand Finance Nordics

Sweden is and remains an unusual country. Besides Switzerland, it is the only country in the world that, despite a small population, ranks among the world's top 15 soft power countries.

This year Sweden ranks 14<sup>th</sup>. This means Sweden drops five spots partly following an uncharacteristically shaky political year. The overall score still improved (marginally) which illustrates that the world continues to look highly favourably on most elements that build the Swedish country brand. This means the drop is mainly due to a handful of other countries improving more than Sweden this year.

Also, Sweden achieved a top three rank – and hence a Brand Finance medal - in no less than six subcategories. Examples include subcategories 'tolerance and inclusivity,' 'acts to protect the environment' and 'an appealing lifestyle.' Only seven countries in the world achieved a greater number of subcategory top spots.

Despite an even overall score, analytically interesting variations occur when going into the details. Sweden's COVID-19 score improved perhaps while the Swedish coronavirus approach no longer stood out controversially during 2021.

Sweden did take a hit within the leadership subcategory, possibly influenced by the repeated difficulties to form a stable government (parliament has over recent years been unusually fragmented). Sweden is nonetheless

scoring highly within the political stability subcategory, suggesting that many expect the leadership issue to be of a passing nature. As before, Sweden's high ranking, even during times of turbulence, suggests that a strong brand helps build resilience, meaning the world has faith that existing political troubles will be overcome in Sweden.

As usual, the entire Nordic region stands out within the good governance category. In fact, given the relative nature of country rankings, there is good reason to think that the Nordic region – usually manifesting solid overall results in every category measured and only occasionally sticking out slightly more negatively in individual subcategories – will continue to stand out as an exceptional European haven, perhaps even more so going forward as bigger problems are brewing in many other countries. Only if the Russian problem spills over to the Nordics, in a more serious way, can this be expected to change. There is good reason to think that this is unlikely.

Sweden moreover achieves an impressive medal rank within an entire category, namely 'People & Values' (Sweden is placed second and sandwiched between Canada and Switzerland). In this category, values such as 'generous,' 'fun,' 'friendly,' 'trustworthy,' and 'tolerant and inclusive' are measured. Sweden ends up with a top ten rank in four out of those five subcategories. Sweden's weakness, compared to the category-winner Canada, is that Canada is perceived as more fun.

# Interview with Swedish Institute



**Sofia Bard**  
 Head of Unit, Image  
 of Sweden Analysis,  
 Swedish Institute



**Besides Switzerland, Sweden is the only country in the world that, despite a small population, ranks among the world's top 15 soft power countries. How can understanding the perceptions of your nation brand help direct your storytelling efforts?**

Sweden has a strong nation brand, or brand identity, which means that even those who have limited knowledge about Sweden often associate Sweden with clear concepts. Sweden is associated with good governance, sustainability and is perceived to be a stable society. Sweden is also perceived as a country that, in various ways, contributes positively to common international challenges. These strengths in the Swedish brand are also the foundation for the strategy for the promotion of Sweden abroad, and for the communication with international target groups. The brand story is based on the idea that there needs to be harmony between the perceptions about Sweden abroad, what Sweden is and stands for as a country, and what message we want to send to the world. In order to finetune communication, through storytelling, the Swedish Institute follows information flows about Sweden in media and social media, as well as follows the image of Sweden abroad – the perception of Sweden. The information provides us with valuable knowledge that can be used as a foundation for communication activities.

**Sweden ranked in the top 2 for its 'acts to protect the environment'. What does it mean for Sweden's brand story?**

Sustainability in various ways is central to the Sweden brand story, as it is for many nation brands. We do think that Sweden has a very high credibility in this area; Sweden was the first country in the world to pass an environmental protection act in 1967 and climate change is widely acknowledged by the Swedish people as the foremost pressing global issue. Sweden also has a strong reputation of being a country that positively contributes to addressing these issues internationally. But with this position comes responsibility. The Swedish government, Swedish companies and the Swedish people have high ambitions, and we continue to strive for the most innovative and sustainable solutions. We also acknowledge that it is crucial not only to talk about sustainability: it is crucial to actually "live the brand" and be truly sustainable in all types of communication.

**People & Values is Sweden's strongest pillar of soft power. Although many people would consider a society built on equality to be a utopian vision, it seems to come quite naturally to Swedish people. What role do values play in your national identity, and how do you communicate them abroad?**

Values like equality and democracy do have a central part in the Sweden identity, nationally and internationally. These are values that we share with many countries, and that are very attractive to many target groups abroad. At the same time, we are aware that the values that are part of the Swedish society stand out in some contexts. Looking at the Inglehart and Welzel World Value Survey 'cultural map', we can see that Sweden positions as one of the most secular and also one of the most individualistic countries. In international communication, it is crucial to listen and let the communications be dialogue based. It is also central in our Strategy for Sweden promotion and in our communication to signal that we are open. We know what Sweden stands for, and we highlight this in our communications, but we also listen and are curious of the views of our target groups.

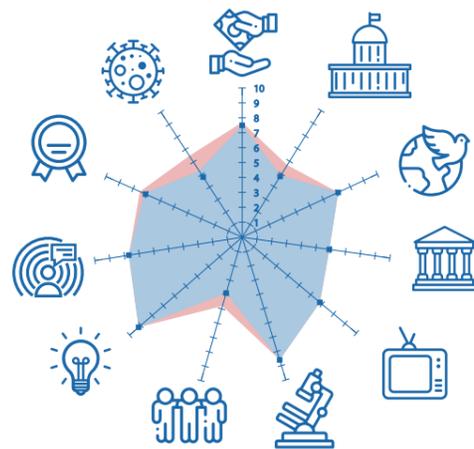


USA's performance compared to best in class per pillar  
 ● Best in Class ● USA's Results

# USA

Rank #1 ↑ #6

Score 70.7/100 +14.8



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**Laurence Newell**  
 Managing Director,  
 Brand Finance Americas

What a difference a year makes! This exclamation might suggest my political inclination regarding US politics. It doesn't. It does, however, reflect the opinion of over 100,000 respondents across more than 100 countries who believe the United States is reclaiming its place as the global leader in soft power.

While Brand Finance's Global Soft Power Index in 2021 measured a rapid decline for the US, one year on, the Index tells a vastly different story. A turbulent election campaign and a haphazard response to the COVID 19 pandemic had the country dropping to sixth place in 2021 with an overall Index score of 55.9 out of 100. In 2022, the US reemerges having made significant advances across all Soft Power pillars, helping it to reclaim the leading position with a score of 70.7 out of 100.

A deeper dive into the analysis shows that where the United States regained much-needed positions is in terms of Reputation (7.1 vs 6.6), Governance (internationally admired leaders, politically stable and well-governed, respects law), and International Relations (7.1 vs 6.2) all of which had been clear hallmarks of the United States' role in global relations up until only a few years ago.

Added to this, are the positive numbers associated with Business and Trade also reflecting a significant

increase. At the turn of the last century, President Coolidge brought the phrase "The Business of the United States is business!" to life and 2021 captures that sentiment once again. Third only to Germany and Japan, the United States is as a top performer in 'easy to do business in and with', has a 'strong and stable economy' (9.7), and produces 'products and brands the world loves' (8.7). Each of these measures is up by at least a full point year-over-year according to the index. A trifecta that should put the country in a position to attract and retain investment for time to come, these attributes signal not only that the US is back reputationally but also is resurgent as a country with which the world wants to do business with.

Interestingly, the most eye-catching category that study reveals is how the US continues to widen the gap with other nations in terms of science and technological leadership. Up by at least one point annually since 2020, the country is the undisputed leader in Science and 'innovative technology and tech companies'. The US towers over other nations and has multibillion dollar brands that lead this development. The country is home to Amazon, Apple, Google, and Tesla, all current powerhouses, and beacons for what is to come.

# Interview with VisitFlorida



**Staci Mellman**  
 Chief Marketing Officer,  
 Visit Florida



## Why is it essential to build a tourism brand on a state level?

Sunshine, beaches, and theme parks by themselves make for a powerful vacation story, and yet Florida tourism is much more.

Our duty as a state-level brand is to create marketing initiatives that communicate the many different aspects of our destination and encourage potential visitors to explore areas that are truly unknown to them. This strategy helps disperse travellers and provide the economic benefits of travel and tourism to smaller communities and businesses.

Tourism marketing constantly refreshes a narrative that emphasizes a location's best qualities and experiences. If a state were to cease destination marketing efforts, it would be surrendering control of its brand story to negative news cycles and uninformed generalizations.

We have been promoting Florida vacations for 25 years. The results prove that our marketing has the power to change what people think about a destination, protect a destination's image in a crisis, support growth in the face of strong competition, and deliver economic impact to local communities.

## How do you track the success of the VISIT FLORIDA brand?

Destination marketing organizations do not sell off-the-shelf commodities like coffee or mascara. We market adventures and shared experiences and memories worth repeating. VISIT FLORIDA inspires tourism, which generates more than 1 million jobs and fuels a quarter of the state economy.

To quantify our performance, we track macro-related KPIs such as overall visitation, the state's market share of domestic and international travellers, and a variety of economic impacts (visitor contribution to Florida's GDP, jobs supported by out-of-state visitors, and ROI on our marketing investments). We also closely monitor the influence of VISIT FLORIDA's marketing through such measures as incrementality of visitation, shift in destination perceptions, and intent to travel to Florida.

Now, with the help of Brand Finance, we are tracking the dollar value of the state's tourism brand and how the work we do continually increases its value to the state of Florida.

## Why did you think it was important to value the VISIT FLORIDA brand?

VISIT FLORIDA is a performance-driven company. We measure almost everything we do. With the emergence of an ISO brand valuation formula, brand equity and brand value have become critical indicators of an organization's future earning capacity.

Destination marketing organizations such as VISIT FLORIDA typically operate as not-for-profit corporations or government agencies. Most destinations think of their brand as a framework for developing marketing messages rather than counting it as an asset. But given that Florida is one of the top vacation destinations in the world, VISIT FLORIDA believes that regularly measuring brand value provides a financial benchmark that helps us monitor our performance and compare our marketing investment to similar-strength brands.

Going forward, this metric will be critical to proving our success as stewards of an important brand within the global travel industry.

## What do the experts say?

- **Alastair Campbell: Britain is Chipping Away at its Soft Power with Self Inflicted Wounds**
- **Michael Clarke & Helen Ramscar: Soft Power Steps up in Ukraine Crisis**
- **Professor John Davis: Far from Being just Gesture Politics, Russia's Isolation from Education, Sports and Travel Networks Matters**
- **Saeed Mohammed Al Eter: Soft Power in the Post-COVID Era**
- **Alexander Stubb: For Russia's Neighbours Soft Power is also Hard**
- **Dr Paul Temporal: Soft Power and Nation Branding - Strategy & Structure**
- **Helle Thorning-Schmidt: The Recipe for Small Country Soft Power Success – Generosity, Equality, Culture and Moving Quickly**
- **Guy Verhofstadt: Soft Power Is Not the Sole Preserve of Nations – the EU Must Grasp the Opportunity**

04

**Contributions**



**Alastair Campbell**  
Writer, Strategist, Former  
Head of Communications  
for Tony Blair

# Britain is Chipping Away at its Soft Power with Self Inflicted Wounds

With Russian aggression in Ukraine so dominant in international debate right now, there is currently more focus on hard power than soft. Military force with the threat of more to come is perhaps the hardest of hard power. And President Putin having moved into Ukraine, President Xi of China will be watching how the world reacts, with one eye on Taiwan.

It is easy to assume, given Putin knew he would attract widespread opprobrium around the world for his actions, that he has no interest in soft power, that he sees it as an obsession of weakened liberal democracies, yet another symptom of the weakened West. Easy to assume, too, that the populations of the West are united in their seeing Putin as a bad man, Russia as a bad actor in world affairs. To be fair, he gives plenty of fuel for such a view.

A few years ago, in a book called *Winners and How They Succeed*, I told the story of G20 summit in Brisbane in 2014, and a remarkable outburst by the Russian president, who told other leaders he was the only one in the room with a strategy, and that they were all tactical, adding 'you think your tactics will bring me to my knees but you will be on your knees first.' Almost a decade ago.

The other leaders have gone. He is still there, and has been since the late 90s. I also reported exchanges from another summit, this time NATO, where a Polish minister echoed Putin's point, saying to the Americans and others that 'nobody knows what your strategy is, everyone knows what his is. Yours seems to be weakness. His is strength.'

Looking at the world through Western eyes, we might think Putin commands respect at home and considerable revulsion abroad. In truth, it is impossible to be sure exactly what Russians really think because of his strict and repressive controls of the media, political and legal institutions. However, I quoted Simon Anholt, who has worked with Brand Finance in tracking how countries are seen around the world, who said that whenever Putin makes what the West sees as an illiberal move, his standing rises in public opinion globally, not just at home. 'Even if people don't agree with them, they respect leaders who stand up for what they believe,' he said. 'People see a leader exercising his authority.'

Whether that has been tested beyond breaking point by his actions in Ukraine, we shall see. But having met Putin before he became President, and several times after, I wish I had a pound for every time I heard people saying he was at risk of over-reach.



Likewise, President Xi, as viewed by the advanced democracies, is invariably seen as a dictator. Yet, because of China's new-found economic power, he has plenty of soft power to match and indeed complement the Strongman image. Even when I left Number 10, less than two decades ago, the UK economy was bigger than China's. That position has been reversed seven times over. The investment into other countries around the world has reshaped those countries, but also reshaped China's image for them.

So we should be far from complacent about the geostrategic trends in the world. I grew up in a world where the geostrategic dividing line was East v West, the political dividing line left v right. Might it now be democracy v authoritarianism, and within democracies, not least our own, a tendency to populism v serious, stable government? It certainly feels like the Chinese and the Russians are having a lot of fun, and power, at the expense of democracies, right now.

Nor should we feel at all complacent about our own standing. The UK regularly features at or close to the top of most soft power indexes. History, culture, Shakespeare and The Beatles, our universities, our great cities and landscapes, our innovators, the BBC, the Premier League, the Queen, we have so much going for us. Yet I worry that many of the less tangible soft power assets are being serially undermined by Boris Johnson and his Vote Leave Cabinet.

If a government in the developing world was bringing in new laws to curb the role of the judiciary, and the right to protest, to limit protection of whistle-blowers and journalists, to curb the power of the Electoral Commission to investigate wrongdoing by parties, to limit academic freedoms, to make it harder for poorer people to vote, I know what Tory MPs would call it.

Yet they have recently voted for all of those things. Equally, Johnson has normalised lying, including in the Commons, where it was once a resigning offence, normalised corruption in contracting, normalised the breach of the ministerial code and the seven principles underpinning public life, which I call HOOSIAL – Honesty, Openness, Objectivity, Selflessness, Integrity, Accountability and Leadership (by example).

I guess we could give him Number 7, in that other MPs and ministers follow his lead, for example in defending the breach of his own COVID laws.





Before anyone dismisses all this as the rage of a Labour-supporting anti-Brexiteer, I suggest you dig out the speech in February by former Tory Prime Minister John Major. Every word!

As a French and German speaker, I regularly channel surf around foreign media, especially when an international story is involved. On Ukraine, to follow the British media you would think Boris Johnson was up there almost on a par with Putin and Biden as a major player, and certainly historically the view from Britain has always counted for something. Follow the foreign media, however, and you get a very clear sense of how, post-Brexit, and now with a Prime Minister widely seen as untrustworthy, untruthful and unserious, the UK matters a lot less than it did.

For now, we have enough enduring strengths to keep us high in the soft power rankings. But a decade of austerity-led defence cuts has weakened our hard power, as the senior military will admit privately, while the Brexit-Johnson combination is weakening our soft power too.

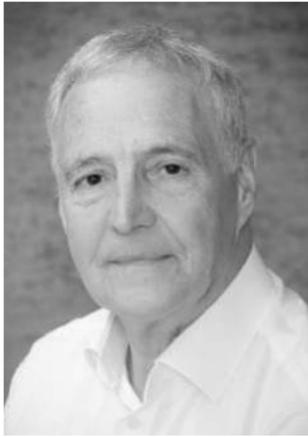
Attacking the BBC, the judiciary, the civil service, putting strategic alliances at risk, the hard rhetoric on foreigners, the constant boasting of being world-beating in areas where we are not, defending the breach of international law in relation to post-Brexit arrangements for Northern Ireland, and of the law on COVID parties ... I think we underestimate the damage being done, and the impact this all has for the long-term, by the steady flow of normalisation of previously abnormal events and trends in our body politic.

We are almost a decade on from London 2012. That was a great time to be British, a great time to be living in London, a great time to be alive. We have somehow managed to create the polar opposite of the Olympic spirit. If things can change that much for the worse in one decade, they can get a whole lot worse in the next one, unless we face up to the damage being done.

There are times in some countries' history when for whatever reasons they choose their own decline. I worry that in going for Brexit, in installing Johnson as Prime Minister, and in the Tory Party continuing to support him despite all they now know about his unsuitability, his lying, gaslighting, incompetence and moral vacuity, that is what we are doing. I hope I am wrong. But there is a reason why Putin and Xi look at Britain right now with a mix of indifference, pity and scorn, while the Americans, the French, the Germans and others scratch their heads and wonder, how did this happen to such a great country, just as many of us did when Donald Trump was in the White House?

Dangerous times. We need a serious government to guide us through them. Sadly, the Johnson government is part of the Trumpian populist danger, not a solution to the challenges of the times, and the UK will pay a heavy price, even after he has gone.





**Michael Clarke**

Distinguished Fellow and former Director General, Royal United Services Institute



**Helen Ramscar**

Associate Fellow, Royal United Services Institute

# Soft Power Steps up in Ukraine Crisis

European society is being tested as never before in 2022 with the Russian invasion of Ukraine. European countries are suddenly confronted with the first inter-state war on the continent since 1945. They are being forced to evaluate their fundamental values, and what they willing sacrifice to defend them, since all policy to counteract Russia's invasion of a neighbouring country will involve domestic pain and sacrifice for other Western countries. The outcome of the immediate crisis across the battlegrounds of Ukraine will be determined in the clash of hard, military power. But the outcome of the wider crisis this war has triggered across Europe and the rest of the world will be determined by the greatest competition in soft power since the darkest days of the Cold War. Seldom has soft power been so consequential a force in global politics as it is just now. The Western world and its values have been challenged in a way few thought likely at the beginning of 2022.

Our analysis of Britain's soft power in *Britain's Persuaders: Soft Power in a Hard World* was completed in 2021 where we argued that – along with the other 'middle powers' of Europe – Britain would find the decade of the 2020s very testing, raising a number of difficult security issues – including the growing threat of an explicitly revisionist Russia. We argued that though this decade would pose quite a challenge for the British political establishment, British soft power was nevertheless a great source of deeper societal strength and that it could be utilised more effectively to Britain's advantage in world politics if it was understood better.

Soft power, it is often acknowledged, flows more from society and its institutions than from a country's political establishment. It is a phenomenon that

exists over the long-term – structuring power relationships more than manipulating them to a particular end. Soft power is the power of social magnetism; the power that doesn't project itself too explicitly, but which creates emulation in other countries; it is the power that makes other societies want to be more like our own.

With these principles in mind, and understanding that Britain historically scores well in most of the world's various 'soft power rankings', we wanted to look more closely at what that involved in specific terms. We took a different approach to many other studies which we nevertheless adopted as our starting point. British society is rich and varied. It has deep roots and, for historical and demographic reasons, has a significant presence in world politics that goes beyond the influence of its governmental or formal political influence.

So we defined nine different ways in which 'Britain's persuaders' – those people and institutions who carry influence in various ways across the world – might, consciously or not, be expressing their soft power attractions. We looked at the range of 'convenors' who naturally brought groups and ideas together. We analysed the officials in government who achieved influence primarily by 'speaking softly' in what they did. British research and innovation was another source of soft power influence, as was the influence British institutions have in setting functional regulations in so many different fields across the world. We looked at British multiculturalism and cosmopolitan values as a natural source of international influence; at education in all its formal and informal guises; and at the reputation Britain possesses for nurturing and attracting creativity in many different fields. We tried to assess the impact and direction



of British entertainment industries, ranging across all sectors from theatre and film to music and sport. Not least, we assessed the power of 'British individualism' – even eccentricity – in trying to understand how Britain projects itself as an easy-going home for bloggers, vloggers, stars, saints, and the socially anarchic.

We set this analysis in the existential terms of power – the understanding of 'power' as one of the fundamental dynamics of human and societal behaviour. And at the end of our analysis we suggested how a better understanding of British soft power could more fruitfully be injected into government decision making processes, and particularly into Whitehall's recent attempts to handle policy in more integrated and holistic ways.

When we had completed the manuscript for *Britain's Persuaders* we had little idea quite how relevant its underlying concerns would be. 'Power' exists on a spectrum where both hard and soft expressions of it are ever-present. Paradoxically, it is in times of war itself that the necessary fusion of both hard and soft power thinking is most evident, and certainly most required. The war in Ukraine has crashed onto the international scene as the most explicit challenge of a growing authoritarianism

in the twenty-first century to the liberal democracies, which have been on the back-foot politically and economically for more than a decade. If the liberal democracies have now rallied as a result of this challenge – and accepted some significant degrees of national sacrifice to stand up against an unprovoked military attack – the strength and depth of their societal values, their determination to act in accord with them, and the influence of western society across the world, is at issue with every passing day.

The societal strength of countries like Britain is tested and demonstrated by war and crises such as this. Soft power does not take a back seat when wars occur; it becomes the underlying rationale of what conflict is largely about.

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*Helen Ramscar is Associate Fellow of the Royal United Services Institute. She is a graduate of Durham University, the Centre for International Studies and Diplomacy at SOAS, and the Cass Business School.*



**Professor John Davis**  
Chair of BrandNewView,  
Academic, Former Dean  
and Professor of Marketing  
at SP Jain School of Global  
Management

# Far from Being just Gesture Politics, Russia’s Isolation from Education, Sports and Travel Networks Matters

I have rewritten this article several times since first asked to submit due to unfolding events from Russia’s invasion of Ukraine, a horrific catastrophe that is revealing the tension between hard and soft power. Russia’s invasion shows the hard power of military coercion, including nuclear threats. Economic sanctions by many world powers are the non-military hard power response. Russia is threatening the world through the example of its power, whereas Ukraine is demonstrating the power of its example. Witness the brave resistance displayed by Ukrainian citizens and military forces in the early days of the invasion, slowing Russia’s advances, and the courageous leadership of President Zelensky in the face of an overwhelming adversary. In this time of extraordinary peril, the importance of skillfully wielding soft power has never been greater. Given my background in business and academia, not politics, I am looking at this crisis through three lenses of soft power: travel, sports, and education.

## Travel

Travel is a vital driver of a nation’s reputation with the rest of the world. Russia’s is being reshaped because of Ukraine. Sympathy for Ukraine is felt worldwide. As I write this, global travel, a ~US\$9 trillion industry (pre-pandemic), is being impacted. Airbnb is working to house 100,000 Ukrainian

refugees. The EU’s 27 nations banned Russian aircraft, as have Canada and the US. Australia has imposed restrictions on their carriers. Russia then banned airlines from 36 countries. As a result, Russia will no longer receive critical sources of travel-related capital inflows, a potentially ruinous long-term economic outcome. Consider the social capital implications. The ‘aha!’ moments travel evokes are priceless, creating experiences that enhance our appreciation for other cultures. When we visit another nation our ‘signal detectors’ are at their most sensitive, energised by the stream of new stimuli, including differences, flowing our way. Our observations open our minds to other perspectives, sparking new insights and stimulating innovative ideas. Russia will be deprived of these benefits because of its invasion of Ukraine. Its credibility worldwide is severely damaged. Sadly, the Russian people will suffer the consequences of their leaders’ decisions.

## Sports

Global sport generates ~US\$600-\$800 billion each year, depending on your definition. Sport attracts fans, fans attract media, media attracts sponsors, and sponsors support athletes, contributing to the economy and increasing a nation’s visibility. But sport represents more than just commercial gain. Sport creates a halo effect that inspires national pride. We follow and admire athletes and teams.

We feel their glory, and their defeat. We are drawn to the sheer unpredictability of the outcome and the animating hope that, despite the odds, an underdog can prevail. Sport helps make nations relatable. That’s why it is notable that sport and sport brands worldwide are protesting Russia’s aggression. Among the examples: the Russia Grand Prix was cancelled; Manchester United cut ties with Aeroflot; FC Schalke severed its partnership with Gazprom; FIFA and UEFA suspended all Russian clubs and teams; the IOC urged sport governing bodies to ban Russian athletes; Badminton’s governing body cancelled all tournaments in Russia and Belarus; the IIHF (ice hockey) suspended all Russian and Belarusian teams; and FINA (swimming) cancelled the World Junior Swimming Championships scheduled in Kazan. With Russian sports already under scrutiny for ongoing doping violations, these latest reactions by the world’s leading sport bodies deprives Russia of a vital area of global goodwill.

## Education

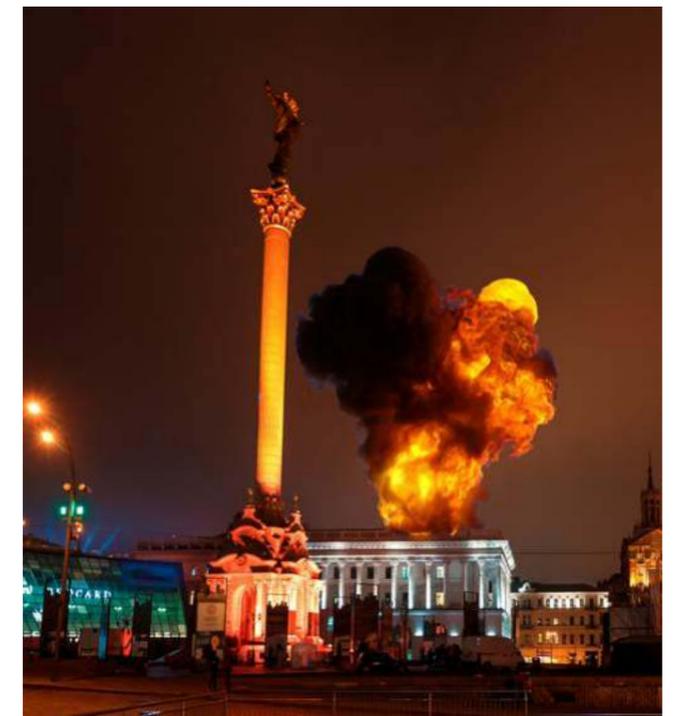
Education is a US\$6 trillion industry. A nation’s education system is an expression of its interests, values, and priorities. Education is supposed to bring people together, break down misunderstandings, identify challenges, and discover answers. Higher education is a magnet attracting students from around the world, awakening their curiosity, sharpening their critical thinking skills, and encouraging exploration of a better life with people different from themselves. Approximately 5 million students worldwide study abroad each year. Pre-pandemic, approximately 1.3 million foreign students studied in Europe and 1 million studied in the U.S. Ukraine attracts more than 80,000 students from 158 countries, with 20% from African nations. Over 55,000 Russian students study abroad.

There is concern that academic partnerships are at risk and students are under threat, cutting off the critically important exchange of ideas. For example, MIT ended its program in Russia, and the **Presidents’ Alliance on Higher Education and Immigration** is seeking protected status for Ukrainian nationals studying in the U.S. In Ukraine, it is especially poignant that Ukrainian literary expert Mariia Shuvalova tweeted:

“National University of Kyiv Mohyla-Academy suspended all lectures. My students now are joining Ukrainian army. #Ukraineisunderattack #StandWithUkraine.”

Their courage is admirable, yet they shouldn’t have to choose armed conflict over learning how to cooperate with others and become ambassadors of soft power.

Travel, sport, and education are not the only areas of soft power impacted by Russia’s invasion of Ukraine. But they are vital requirements for a healthy society and help shape a nation’s reputation.





**Saeed Mohammed Al Eter**  
Chairman,  
UAE Government  
Media Office

# Soft Power in the Post-COVID Era

As we emerge from two years of pandemic, contemplating the idea of light at the end of the tunnel, it is perhaps worth taking stock of how our world has already changed – possibly in ways for the better. Apart from adding the phrase ‘you’re on mute’ to our vocabulary, the pandemic has brought us new ways of doing things: the spectacle of businesses and indeed people ‘pivoting’. Old ways of creating value have given way to new ideas, new behaviours and ‘new normals’.

In all this transformation and disruption, what has changed in soft power? We have already encountered the spectacle of nations scrambling to provide the PPE that characterised the early period of the pandemic and then seen the emergence of ‘vaccine nationalism’, both in terms of nations protecting stocks of vaccine and jostling to ensure sufficient

doses for their populations and in terms of national ‘ownership’ of successful vaccines. This apparent selfishness on the parts of governments has been balanced by open handed gestures. Donations of hospital beds, PPE and now millions of doses of vaccine have proven to be a powerful soft power tool in today’s world, when given freely.

It has not just been how nations have behaved in terms of their willingness to share resources, however, but how they have reacted to protect their own populations with policy.

New Zealand has certainly provided an example to all – assertive, effective national leadership in a time of crisis should not, and must not, be scared to call on people to accept limitations for the greater good.



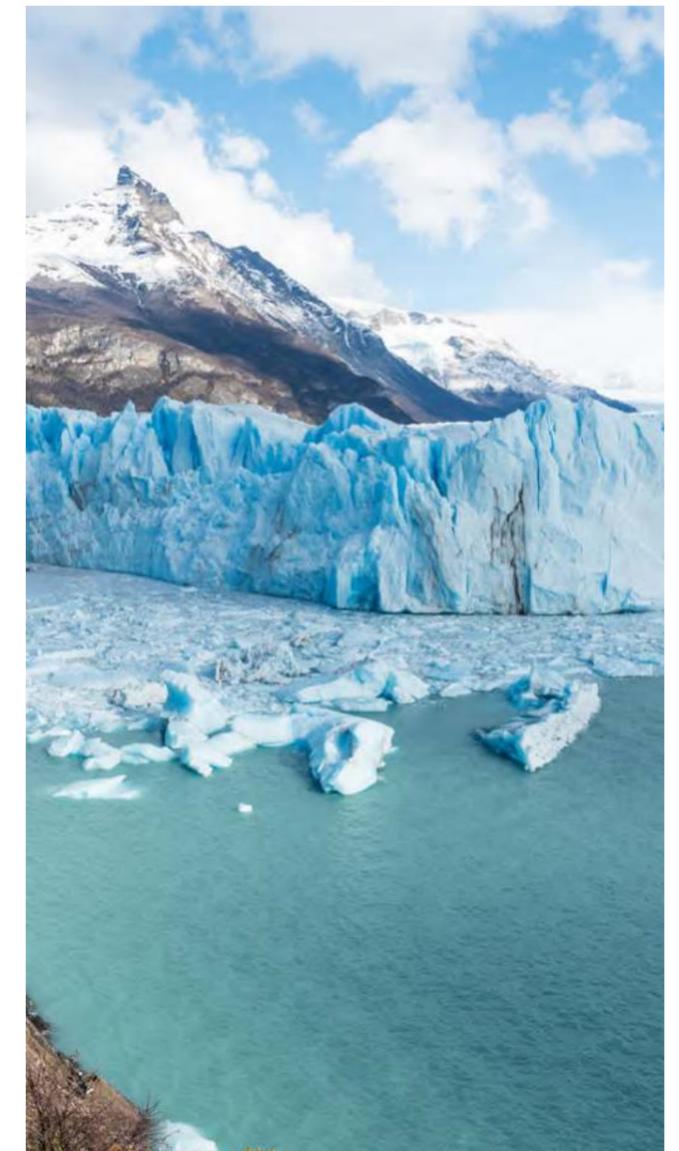
The idea, of course, that collective responsibility should limit personal freedoms is a dangerous one, taking us back to the spectre of hard-core communist or autocratic ideologies – and yet this is precisely what New Zealand, a country that punches way above its weight with its soft power, has done.

There is a lesson here that is, I believe, at the core of soft power in the post-COVID age. If a nation is admired, respected and trusted, people are more willing to accept its actions, to question them and seek answers and reason rather than instantly condemn them. Soft power in times like these buys us the benefit of the doubt. But it is not achieved through ‘messaging’, but through truly adhering to values that reflect and represent a nation and its people. Hard power, we know, is wielded at the cost of soft power.

Should the regard of others around the world influence our decisions when lives are at stake? If we value co-operation, collaboration and have internationalism high on our agendas, then clearly the answer is yes. If we have decided to focus inwards and take refuge in populism and hide behind exceptionalism, we can disregard ‘the other’ – and I do believe that the idea of ‘vaccine nationalism’ is rooted in this kind of thinking and, ultimately, damaging to a nation’s soft power.

By working internationally, by seeking dialogue and understanding (so important to soft power), we can confront the greatest of challenges. And it is my hope that the lessons we learn from the pandemic will be applied to humanity’s greatest challenge of all – far greater than COVID, far greater than even the most appalling conflict emerging into the consciousness of a world already reeling from the pandemic. It’s hard to keep focused on the long-term danger with our short-term concerns, but we mustn’t lose sight of the greatest challenge we all face – climate change.

I believe that turning our backs on selfishness and breaking down barriers, welcoming other philosophies, ideologies, faiths and approaches are all key to soft power. Ultimately, being open and welcoming, honest and generous are values that build trust – and in trust we have the bedrock of co-operation. I think, personally, that the focus on building nations’ soft power has never been so important in our world than it is now as we manage today’s trials together, with an eye to facing the great challenge of our shared tomorrow.





**Helle Thorning-Schmidt**  
Former Prime Minister  
of Denmark

# The Recipe for Small Country Soft Power Success – Generosity, Equality, Culture and Moving Quickly

The evening before I visited President Obama in the white House, my team and I shared a night cap in Blair House in Washington DC. Whilst super focused on the agenda we also had a few laughs, and bets were made on whether the President would tell me that Denmark was punching above its weight on the global stage. He did, and in fact it was almost the first thing he said.

The story tells you that you that silly banter with colleagues doesn't stop when you become PM, but more importantly it tells you how much we Danes want our mighty ally to notice what we are doing. Deep in our Danish bones we know that the first, the second and the third rule of Danish foreign policy is to be seen as bigger than our size. The hard power tools to achieve this are obvious: be an active member of NATO, take part in the most important missions from Afghanistan to Libya to combatting piracy around the Horn of Africa. Be nimble and rapid in deploying your military and share intelligence with your allies.

But the reality is that hard power will never be the thing that gets Denmark noticed, as we simply do not have the scale to make a decisive impact.

We can and we do make a significant contribution through our membership of international organisations.

As a member state of the European Union, the Arctic Council and NATO we are able to strengthen and amplify our ability to influence global affairs.

But you need more than multilateral diplomacy if you are to get yourself noticed and build influence, you have to be a country that others feel they can be inspired by, learn from or just be curious about. Or to put it simply you need to be attractive.

So here are four ways to generate the power of attraction, otherwise known as soft power:

First, do good things and be the first to do them. Denmark is widely recognised as one of the first movers in terms of recognising and seeking to reverse climate change. For decades successive Danish governments have talked about renewable energy, and substantial sums of money have been invested in the technology to drive the transition to net zero. As a consequence, Denmark is now home to some of the biggest green energy companies, and there can be no doubt that this position has given a platform and a voice in climate diplomacy that we would not otherwise have had.

Second, be more accountable and generous than the rest. There is a small club that only a handful of countries belong to: those of us who donate more than 0.7% of our GDP to developing countries.

This gives us permission to speak and to be heard on development policy and the like in the UN, beyond what a small country would normally expect to have.

Third, secure high growth and combine it with high levels of equality. There can be no doubt that the so-called 'Nordic Model' has delivered for the Nordic societies. We are amongst the wealthiest nations of the world, whilst also being amongst the most equal. And there is very broad democratic support for the model: just about any Nordic person you meet will grumble that taxes are a bit high, but will qualify that complaint by expressing pride in the welfare state, free healthcare, free education, decent salaries, high productivity, no corruption, lots of opportunity and equality. And all of this plays out in the endless competition between Denmark and Finland to top the annual Global Happiness Index!

Fourth, never forget the power of culture. Many of you will have watched a couple of Nordic Noir series, whilst struggling with the subtitles, no doubt! One in particular has played an important role in building Denmark's soft power. A year before I became Prime Minister the first episode of Borgen was aired.

Here you had it, for the first time and on primetime TV: a Danish female prime minister. I have no doubt that the fictitious character of Birgitte Nyborg, made it easier for the Danes to imagine a real life female PM. What I didn't realise was that the show would give people who never thought they needed to know this an insight into the Danish political system. Our numerous political parties and cumbersome coalitions. For Denmark it has been significant. For me personally even bigger. Countless conversations with PMs and presidents from Japan to Ethiopia to France have been opened by comments and enquiries about Borgen. Sometimes it has been like the Danish PM was known even before she touched down in the airport - you really can't ask for more soft power than that.

If I had to define soft power in a few words, I'd say it's when someone does a double take and listens to what you have to say, even when the traditional rules of diplomacy mean they don't really have to.

No small nation can ever afford to forget that soft power is what actually makes the difference, if we truly want to punch above our weight.





# For Russia's Neighbours Soft Power is also Hard

## Alexander Stubb

Former Prime Minister of Finland, Former Vice President, European Investment Bank, Professor & Director at the EUI School of Transnational Governance

I was born and raised in country with a 1340 km border with Russia. That is 200 km more than the distance from the Southern tip of England to the Northern most point of Scotland.

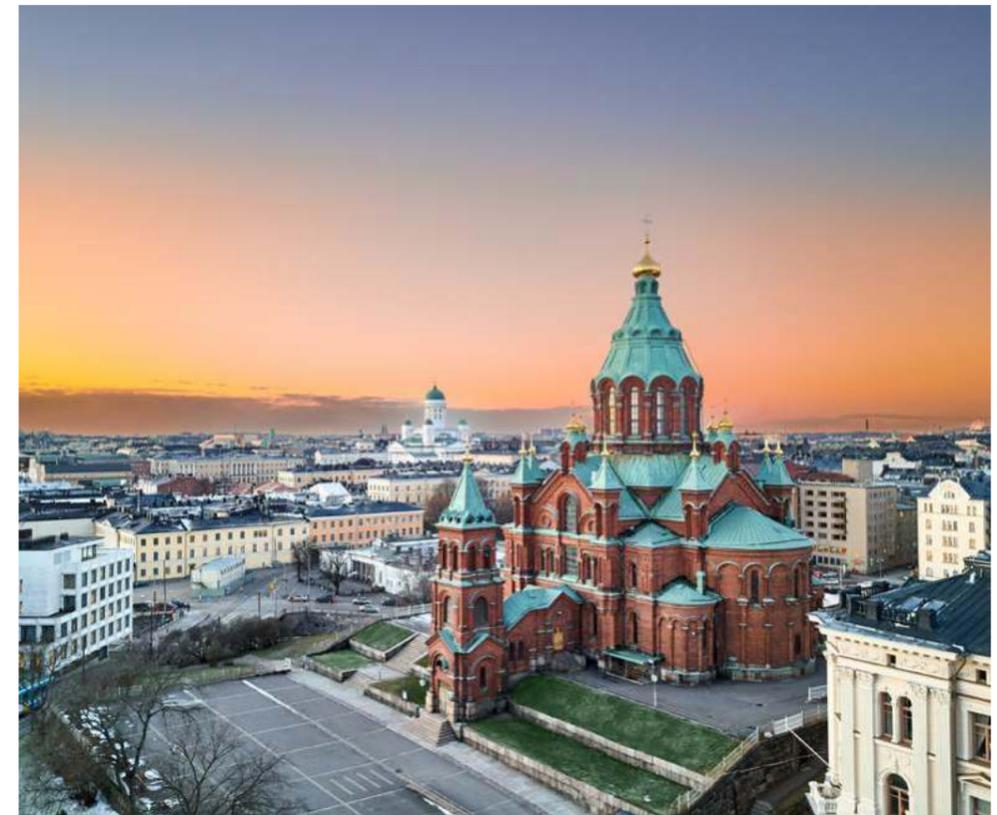
Our relationship has never been easy. We were an "autonomous" part of the Russian empire from 1809 to 1917. Following independence we fought a bloody civil war with infiltration from Soviet Bolsheviks.

Things settled for a couple of decades before Russia attacked us in 1939 in what became known as the Winter War. We fought back, survived as an

independent nation and ended up with a difficult peace settlement in 1944.

During the Cold War we had to compromise our values in order to guarantee our security. It was all about survival next to a grand aggressor. Free speech was limited. Foreign policy debates were taboo. The Soviets meddled with our internal affairs.

Why do I tell you this? Because I want to illustrate that soft power can sometimes be hard. It feels odd to say this in the middle of a horrific war where Russia has once again attacked one of its neighbours, Ukraine, but it's how Finland has survived.



Machiavelli used to say something the effect that the survival of small states is all about timing. I guess he was right, but it is also about using power in a smart way. That is exactly what Finland has done over the centuries.

Soft power is really about the ability to co-opt, rather than coerce, using persuasion rather than force. Finland has been good at that. The basis of it all has been an impeccable education system and functioning governance. Sure, other things such as foreign relations, culture, values, products and communication matters, but it all starts with a solid base.

We are pretty much top 5 in the world on most of the measures that matter: education, governance, transparency, quality of life, freedom of the press, transparency, equality, and quality of life. To top it off, year after year, we seem to be the happiest country in

the world...don't let facial expressions fool you.

Contrast this with Russia, which ranks nowhere near the top in any of these measures. Except one of course: military expenditure, in other words hard power. It should thus come as no surprise that the border between Finland and Russia has one of the highest differences in GDP per capita, and especially the gap between rich and poor.

Having raved about soft power you might think that Finland has neglected the hard side of things. Worry not, you can't do that with a long border next to an unpredictable neighbour. We still have one of the biggest military forces in Europe to go with an annual 2% defense budget.

In order to be able to project soft power, you have to have some of the harder stuff to back it up.



**Dr Paul Temporal**  
Associate Fellow,  
Saïd Business School,  
University of Oxford

# Soft Power and Nation Branding: Strategy & Structure

Few countries have a comprehensive, integrated nation brand strategy or soft power strategy and it is limiting their chances of success. Inadequate brand management structures are partially to blame.

Nation branding is concerned largely with the effect of a country's image on the economy. A strong, positive nation brand encourages inward investment and export growth; it attracts tourists and talent. Soft Power, on the other hand, is the ability to persuade and influence, mainly in the international arena. It can be a strong driver of nation branding success at all levels, and eight of the top 10 countries in the Global Soft Power Index 2022 appear also in the Brand Finance Nation Brands 2021 top ten.

Despite the fact that soft power has measurable value, many countries still use it in a reactive way, responding tactically, not strategically, to urgent political challenges. By doing so, they fail to take the opportunity to develop long-term soft power plans linked to a nation brand strategy.

There are two main reasons why this happens: the wrong choice of brand architecture and inadequate brand management structure.

In the corporate world, it is established practice to develop a master brand strategy and link this to an 'architecture' of sub-brands and product brands. So it should be in the public sector, as all brands then gain trust, strength, and value over time.

What we find, though, is that most countries start to build a nation brand identity based on only one sector – often tourism, which is the most visible and measurable activity.

And, having started on this trajectory, they inevitably continue with a sector-by-sector, sub-brand approach. This can lead to competition between sub-brands for investment and the 'ear' of government, which often results in wastage and/or duplication of investment funding. There can even be competition within sub-brands and product brands such as national tourism, state tourism, or tourism to city and place destinations.

So why does this happen? I think an all-embracing nation brand strategy is often seen as 'mission impossible'; getting all stakeholders involved and in agreement on development and implementation seems just too difficult.

Further, developing and managing a nation brand is a long-term process, with results also taking a long time to appear. Political thinking and government budgets are short term, driven by the need to demonstrate returns on investment and improvement in fiercely competitive markets.

But the only way to build a powerful nation brand is to use the master brand approach, and the most effective way to accommodate this is to create a strong, powerful, and inclusive brand management structure at a high level; a structure with the power to effect change, inclusivity, and a broad remit. There have been some useful models that testify to the success of structured brand management such as those in South Korea, Switzerland, and Australia.

The South Korean Presidential Council on Nation Branding (PCNB) was founded in 2009 as a result of a nation brand research study that ranked Korea 39<sup>th</sup>,

behind countries including Mexico, India, China and Egypt on various brand strength factors such as cultural appeal, governance, demand for exports and others, even though Korea was the 13<sup>th</sup> most powerful economy in the world.

PCNB comprised 47 members (16 senior government officials including eight Ministers, and 31 representatives from the private sector), with five teams responsible for international co-operation, corporate and information technology, culture and tourism, the global community, and overall co-ordination. It played a central role in reorganizing and managing South Korea's branding activities and creating positive images abroad. With a nation brand vision of "A Reliable and Dignified Korea" and core values of "Sharing, Consideration, Respect, Communication and Unity", its strategy was designed also to reinforce and develop soft power. South Korea is now ranked 12<sup>th</sup> in the GSPI 2022 and 10<sup>th</sup> in the Nation Brands 2021.

Australia has a Minister for Trade, Tourism and Investment and this integrated portfolio is helpful in lowering intra-brand competition and ensuring buy-in across industries and sectors. Reporting to the Minister is a National Brand Advisory Council whose role is to provide strategic advice and leadership and is made up of 12 influential public and private sector leaders from diverse industries. The Council is supported by a Nation Branding Expert Working Group that provides branding and creative

guidance, so completing a workable nation brand management structure. Australia is 13<sup>th</sup> in the GSPI 2022 and 11<sup>th</sup> in the Nation Brands 2021 report.

Switzerland does not have a hugely powerful economy compared to some nations, and so relies for its nation brand development heavily on soft power, through Presence Switzerland, a body that monitors and supports the national identity and image abroad. It was created by the Swiss Federal Parliament in 2000 as a decentralized administrative unit within the Federal Department of Foreign Affairs (FDFA) and was given authority by the Federal Act on the Promotion of Switzerland's image abroad. Switzerland is ranked 8<sup>th</sup> in the GSPI and 14<sup>th</sup> in the Nation Brands ranking. Under the Brand Finance Nation Brands 2021 methodology, Switzerland was named the world's strongest brand.

If poor brand architecture choices and lack of strong brand management are barriers to success, then countries must combine nation branding and soft power data and activities for use in developing an integrated nation-brand strategy. Well-organised brand management is essential to navigate these tricky waters, and there must be multi-sector buy-in, control, consistency, and measurement. The cases mentioned highlight the need to drive and manage a nation's brand at the highest level, and to include all stakeholders in its development and management. It is not an impossible task.





**Guy Verhofstadt**

Former Belgian Prime Minister, Member of the European Parliament and Co-Chair of The Conference on the Future of Europe

# Soft Power Is Not the Sole Preserve of Nations – the EU Must Grasp the Opportunity

Soft power, like hard, is increasingly something we do together as Europeans

Traditionally, hard and soft power go together—one cannot do without the other, or at least not for long. Of late, we have seen hard power colliding with soft power as never before. The conflict that overshadows everything at this moment started with an EU-Ukraine Association Agreement and ended in a Russian threat of unprecedented war. The Ukrainian people wanted to be close to Europe, to be a part of Europe, to be European in every sense of the word... but the geopolitical agenda of Putin dictated otherwise—at least for now. And overnight, the traditionally soft EU has extended itself into a geopolitical, partially military hard power. The interplay between soft and hard power is as relevant as ever.

## The EU's X-factor

Even Europe's soft power, however, remains undiagnosed and underused. In the 2021 Global Soft Power Index there was only one mention of the European Union... in the context of geographical indication protection for Parmigiano Reggiano. Yet EU influence is considerable in all seven of Brand Finance's pillars of soft power: business and trade, governance, international relations, culture and heritage, media and communication, education and science, people and values.

To start with the last: the best compliment is emulation.

While the European Union has been in undeniable political crisis since 2008, and while its liberal-democratic ethos and institutions have been undermined especially since 2016, they remain a model and an aspiration for people who don't enjoy them across the world. The values of individual independence, economic, social, intellectual, cultural and sexual freedom, democratic sovereignty and cross-border cooperation all remain attractive. If big global players like sovereignist states or multinational companies don't always like to listen to the EU, their citizens and customers are all ear for what Europe stands for.

In contrast, the soft power of the hard powers remains limited. China really re-emerged on the global stage with the 2008 Olympics, the day Putin attacked Georgia. The 2022 Winter Olympics proved an understated success for China, with painful silences around human rights abuses all too present, whereas Russia was notably and degradingly absent for never playing by the rules. While their economic and geopolitical presence has continued to expand and their propaganda power is huge, their truly 'soft' attraction remains far less impressive. And that was before Putin's mask came off for good.

## Strengthening soft power

Both soft and hard power increasingly take place in a European context.



Europe is the perspective through which Europe's nations see the wider world and their own role in it. European integration is the process to update both. Now that such an update is more than ever needed, the EU needs to make better use of its soft power across the board, strengthening and extending national efforts.

Trade and competition policies are one way to do it: regulating open trade to include new sensitivities such as sustainability, human rights and health issues, and updating competition rules so that we create European competitors and tackle overbearing mastodont companies refusing to play by our rules on privacy or hate speech, tax or sustainability concerns.

Europe's market power and educational strength can also go further in science and innovation, both in traditional strengths like pharmaceuticals and in digital sectors where our lack of integration has cost us dearly.

The EU's monetary success has been understandably overshadowed by the euro crisis, but it remains a key asset and should be made more of. It is a tangible symbol of our cross-border interconnectedness, but should also be boosted in its uses as a global reserve currency. And why not use culture, so important for Europe's appeal and self-image, to really boost its attraction world-wide, focusing more on what binds

us as Europeans than what divides us along national cleavages?

## Hard power foundations

The real trouble is the limited hard power of the soft powers. Weakness is never a good basis: EU and its members fall short in elementary aspects of sovereignty, like defence, cyber and migration management. It is not enough at the avant garde of creating or keeping digital companies, setting digital or sustainability standards. Its diplomatic clout is waning, even a traditional strength like development is less sure than before. Who developed the vaccines... and who did vaccine diplomacy best? Fragmentation and self-doubt are undermining both our hard and soft power.

If the current turmoil makes us see sense on our geopolitical weaknesses, it should also spur us to reconnect hard and soft power. We have to reinforce our governance model to underline our democratic and rule of law credentials. We have to double down on the fight against the corruption and cybercrime tendencies that weaken our societies. We have to be bolder in defending the rights, freedoms and values that form the basis of our international attraction. And we have to finally make a positive story out of immigration.

Promotion starts with self-belief and shared strategies. This is the time to think ahead.



05  
**Appendices**

# Global Soft Power Index

The full breakdown of results by nation brand

Rank 2022	Rank 2021	Nation Brand	Region	Index Score 2022	Index Score Change	Index Score 2021	
1	6	↑	United States	North America	70.7	+14.8	55.9
2	3	↑	United Kingdom	Europe	64.9	+7.0	57.9
3	1	↓	Germany	Europe	64.6	+2.4	62.2
4	8	↑	China	Asia	64.2	+9.9	54.3
5	2	↓	Japan	Asia	63.5	+2.9	60.6
6	7	↑	France	Europe	60.6	+5.3	55.4
7	4	↓	Canada	North America	59.5	+2.3	57.2
8	5	↓	Switzerland	Europe	56.6	+0.3	56.3
9	13	↑	Russia*	Europe	56.1	+5.5	50.5
10	19	↑	Italy	Europe	54.7	+6.4	48.3
11	22	↑	Spain	Europe	53.0	+5.6	47.5
12	11	↓	South Korea	Asia	52.9	+1.6	51.3
13	10	↓	Australia	Oceania	52.7	+0.5	52.2
14	9	↓	Sweden	Europe	52.3	+0.1	52.2
15	17	↑	United Arab Emirates	Middle East & North Africa	52.0	+3.6	48.4
16	12	↓	Netherlands	Europe	50.6	+0.1	50.5
17	14	↓	Norway	Europe	49.7	-0.4	50.1
18	15	↓	Denmark	Europe	48.8	-0.6	49.4
19	21	↑	Belgium	Europe	48.5	+0.8	47.7
20	20	←	Singapore	Asia	48.5	+0.6	47.9
21	16	↓	New Zealand	Oceania	48.4	-0.9	49.3
22	27	↑	Turkey	Europe	47.8	+5.4	42.3
23	25	↑	Israel	Middle East & North Africa	47.6	+3.9	43.6
24	24	←	Saudi Arabia	Middle East & North Africa	47.1	+2.9	44.2
25	18	↓	Finland	Europe	47.1	-1.2	48.4
26	26	←	Qatar	Middle East & North Africa	45.8	+3.5	42.3
27	23	↓	Austria	Europe	43.4	-3.3	46.7
28	35	↑	Brazil	Latin America & Caribbean	43.4	+5.3	38.1
29	36	↑	India	Asia	43.2	+5.6	37.7
30	29	↓	Ireland	Europe	41.9	+1.3	40.7

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The full breakdown of results by nation brand

Nation Brand	Familiarity	Reputation	Influence	Business & Trade	Governance	International Relations	Culture & Heritage	Media & Communication	Education & Science	People & Values	COVID-19 Response	Medals
	9.2	7.1	7.7	7.5	4.8	7.1	5.9	6.8	8.6	3.9	4.8	14
	8.7	7.3	6.5	6.4	5.3	6.5	5.5	6.2	6.7	4.0	5.5	10
	8.2	7.4	6.0	7.1	5.7	6.8	5.1	5.4	7.5	4.2	6.5	12
	8.4	6.4	7.3	7.7	3.5	5.6	4.6	4.4	8.0	3.1	5.4	7
	8.2	7.3	5.9	7.5	5.1	5.8	5.2	4.7	8.6	4.4	6.2	8
	8.5	7.1	5.9	6.3	4.4	6.1	5.9	5.4	5.5	4.1	5.5	6
	8.0	7.4	5.3	6.2	5.4	6.0	4.4	5.2	5.7	4.8	6.4	17
	7.3	7.4	4.7	6.4	5.5	5.7	4.3	4.8	5.5	4.5	6.5	14
	7.8	6.4	5.9	5.0	3.8	5.6	4.2	4.3	6.1	3.2	5.3	1
	8.3	6.9	5.2	5.8	3.6	4.8	5.9	4.6	4.4	4.4	4.6	5
	7.9	6.8	5.0	5.1	3.5	4.6	5.5	4.7	4.1	4.3	5.0	4
	7.1	6.5	4.7	6.1	3.9	4.5	4.2	4.3	6.5	3.7	5.8	-
	7.6	7.0	4.5	5.5	4.4	4.9	4.2	4.5	4.8	4.3	5.9	-
	6.6	7.0	4.2	5.8	5.0	5.2	4.1	4.5	5.4	4.5	6.1	6
	6.1	6.6	5.1	6.0	3.9	5.1	3.8	4.2	4.8	3.6	5.9	-
	6.6	6.8	4.2	5.4	4.5	4.8	4.2	4.3	4.8	4.4	5.9	-
	6.1	6.9	3.9	5.3	4.9	5.0	3.9	4.3	4.9	4.3	6.3	2
	6.2	6.8	3.9	5.3	4.6	4.7	3.8	4.2	4.8	4.3	6.1	-
	6.4	6.6	4.1	5.1	4.1	4.7	3.8	4.2	4.4	3.9	5.7	-
	6.1	6.7	4.0	5.8	4.1	4.2	3.5	4.0	5.2	3.8	6.0	-
	6.3	6.8	3.8	5.2	4.5	4.5	3.8	4.2	4.4	4.4	6.2	-
	6.8	6.0	4.7	5.1	3.1	4.4	4.2	4.2	3.7	3.6	4.4	-
	6.5	6.0	4.6	4.4	3.2	4.4	3.2	3.9	5.5	2.8	5.3	-
	6.3	6.0	4.9	4.8	3.2	4.5	3.0	3.6	3.4	3.0	5.3	-
	5.6	6.7	3.6	5.2	4.6	4.5	3.7	4.1	4.9	4.3	6.1	-
	5.0	6.1	4.2	5.3	3.5	4.6	3.3	4.2	4.1	3.4	5.6	-
	6.2	6.6	3.8	4.3	3.6	3.8	3.4	3.4	3.5	3.4	4.7	-
	7.6	6.1	4.3	4.0	2.2	3.3	4.6	3.6	2.9	3.8	2.9	2
	7.4	5.7	4.7	4.2	2.1	3.2	4.1	3.4	4.6	3.0	2.0	1
	6.0	6.5	3.7	4.0	3.5	3.2	3.3	3.2	3.2	3.8	4.7	-

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The full breakdown of results by nation brand

Rank 2022	Rank 2021		Nation Brand	Region	Index Score 2022	Index Score Change	Index Score 2021
31	34	↑		Middle East & North Africa	41.6	+3.3	38.3
32	28	↓		Europe	41.0	+0.2	40.8
33	31	↓		Europe	40.4	+0.6	39.8
34	37	↑		Sub-Saharan Africa	40.2	+3.1	37.2
35	33	↓		Asia	40.2	+1.5	38.7
36	42	↑		Middle East & North Africa	39.1	+3.3	35.8
37	30	↓		Europe	38.6	-1.3	39.9
38	41	↑		Latin America & Caribbean	38.5	+2.5	36.1
39	39	←		Asia	38.5	+1.5	36.9
40	38	↓		Europe	38.2	+1.2	37.0
41	32	↓		Europe	37.6	-1.4	39.0
42	44	↑		Latin America & Caribbean	37.5	+3.2	34.4
43	49	↑		Europe	35.4	+1.7	33.7
44	40	↓		Europe	35.3	-1.0	36.3
45	43	↓		Europe	35.2	+0.5	34.7
46	48	↑		Middle East & North Africa	34.9	+1.1	33.8
47	45	↓		Asia	34.8	+0.5	34.3
48	52	↑		Latin America & Caribbean	34.7	+1.2	33.6
49	51	↑		Middle East & North Africa	34.6	+1.0	33.6
50	57	↑		Europe	34.4	+2.2	32.2
51	61	↑		Europe	34.2	+2.2	31.9
52	-	NEW		Asia	34.0	-	New
53	58	↑		Latin America & Caribbean	34.0	+1.8	32.2
54	60	↑		Latin America & Caribbean	33.9	+1.8	32.0
55	55	←		Latin America & Caribbean	33.8	+0.4	33.4
56	50	↓		Middle East & North Africa	33.5	-0.2	33.7
57	-	NEW		Europe	33.4	-	New
58	-	NEW		Europe	33.3	-	New
59	47	↓		Asia	33.3	-0.5	33.8
60	53	↓		Asia	33.2	-0.2	33.4

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The full breakdown of results by nation brand

Nation Brand	Familiarity	Reputation	Influence	Business & Trade	Governance	International Relations	Culture & Heritage	Media & Communication	Education & Science	People & Values	COVID-19 Response	Medals
	7.1	5.8	4.0	3.5	2.2	3.3	3.9	3.2	3.0	3.1	3.9	1
	6.5	6.3	3.9	3.1	2.8	3.0	3.3	3.0	2.6	3.1	4.5	-
	6.7	6.2	3.8	3.2	2.6	2.9	3.8	2.7	2.7	3.3	4.1	-
	6.4	5.7	3.9	4.0	2.5	3.3	3.2	3.3	3.0	3.0	3.6	-
	6.2	5.9	3.7	4.0	2.5	2.8	3.7	2.9	3.0	3.6	4.3	-
	4.7	5.9	3.9	3.8	3.1	3.6	2.4	2.6	2.5	2.7	5.0	-
	5.2	6.4	3.2	3.8	3.6	3.3	2.7	3.1	3.2	3.2	4.4	-
	6.6	5.9	3.7	3.1	2.1	2.7	3.3	2.9	2.7	2.9	3.7	-
	5.5	6.0	3.6	3.8	2.7	3.0	2.5	2.7	3.0	3.0	4.4	-
	5.7	6.1	3.6	3.4	2.6	2.8	2.4	2.8	2.8	2.8	4.4	-
	4.2	6.4	3.4	3.6	3.4	3.5	2.7	3.0	2.8	3.1	4.2	-
	7.0	5.7	3.8	3.0	1.7	2.2	3.4	2.6	2.3	3.0	3.3	-
	4.8	5.9	3.2	3.1	2.3	2.6	2.6	2.6	2.5	3.0	4.5	-
	4.8	5.9	3.3	3.2	2.2	2.6	2.6	2.4	2.6	2.6	4.2	-
	5.0	5.8	3.2	3.1	2.5	2.8	2.7	2.6	2.8	2.9	3.7	-
	5.2	5.5	3.4	3.0	2.3	2.5	2.8	2.3	1.9	2.6	3.9	-
	5.3	5.7	3.4	3.3	2.2	2.7	2.6	2.3	2.5	2.8	3.2	-
	5.7	5.3	3.4	3.1	2.0	2.6	2.8	2.8	2.5	3.3	3.0	-
	3.6	5.7	3.1	3.3	3.2	2.9	2.1	2.4	2.5	2.8	4.9	-
	4.9	5.5	3.1	3.2	2.5	2.8	2.8	2.8	2.7	3.0	3.5	-
	5.3	5.5	3.4	2.8	2.1	2.5	2.4	2.6	2.6	2.6	3.1	-
	4.4	6.2	3.0	2.7	2.5	2.8	3.4	2.1	1.5	3.2	4.3	1
	5.8	5.2	3.4	2.4	1.9	2.3	2.6	2.2	2.6	2.7	3.4	-
	4.2	5.6	3.1	3.4	2.5	2.8	2.3	2.8	2.5	3.0	3.7	-
	5.2	5.6	3.2	3.1	2.1	2.5	2.4	2.6	2.5	2.6	3.4	-
	4.3	5.5	3.1	2.6	2.3	2.5	2.4	2.1	2.2	2.6	4.8	-
	3.8	5.5	2.9	2.9	2.6	2.5	3.1	2.6	2.5	2.8	4.4	-
	3.9	5.7	2.9	3.2	2.7	2.4	3.3	2.3	2.1	2.8	4.2	-
	5.6	5.4	3.2	3.1	1.9	2.3	2.3	2.1	2.1	2.5	3.3	-
	5.7	5.5	3.2	2.7	2.0	2.3	2.3	2.3	2.0	2.7	3.3	-

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● Gold digits | First in Class ● Silver digits | Second in Class ● Bronze digits | Third in Class

The full breakdown of results by nation brand

Rank 2022	Rank 2021		Nation Brand	Region	Index Score 2022	Index Score Change	Index Score 2021
61	73	↑		Latin America & Caribbean	32.9	+2.0	30.9
62	66	↑		Europe	32.9	+1.3	31.6
63	62	↓		Middle East & North Africa	32.7	+0.9	31.9
64	46	↓		Europe	32.6	-1.5	34.2
65	-	NEW		Europe	32.5	-	New
66	56	↓		Latin America & Caribbean	32.3	-0.8	33.1
67	68	↑		Latin America & Caribbean	32.1	+0.7	31.4
68	65	↓		Middle East & North Africa	32.0	+0.3	31.7
69	82	↑		Sub-Saharan Africa	32.0	+2.8	29.2
70	77	↑		Latin America & Caribbean	32.0	+1.8	30.2
71	-	NEW		Sub-Saharan Africa	31.9	-	New
72	-	NEW		Europe	31.8	-	New
73	70	↓		Asia	31.8	+0.7	31.1
74	-	NEW		Sub-Saharan Africa	31.4	-	New
75	74	↓		Middle East & North Africa	31.4	+1.1	30.3
76	84	↑		Middle East & North Africa	31.3	+2.3	29.0
77	72	↓		Europe	31.3	+0.3	31.0
78	67	↓		Europe	31.2	-0.2	31.4
79	71	↓		Middle East & North Africa	31.2	+0.1	31.1
80	64	↓		Latin America & Caribbean	31.1	-0.6	31.7
81	76	↓		Middle East & North Africa	31.1	+0.9	30.2
82	59	↓		Latin America & Caribbean	31.0	-1.1	32.1
83	63	↓		Asia	31.0	-0.8	31.8
84	69	↓		Europe	30.9	-0.4	31.3
85	81	↓		Asia	30.7	+1.5	29.2
86	93	↑		Sub-Saharan Africa	30.3	+2.2	28.1
87	79	↓		Europe	30.1	+0.3	29.8
88	75	↓		Asia	30.0	-0.2	30.2
89	92	↑		Latin America & Caribbean	30.0	+1.8	28.2
90	-	NEW		Sub-Saharan Africa	30.0	-	New

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The full breakdown of results by nation brand

Nation Brand	Familiarity	Reputation	Influence	Business & Trade	Governance	International Relations	Culture & Heritage	Media & Communication	Education & Science	People & Values	COVID-19 Response	Medals
	4.0	5.4	2.9	3.2	2.3	2.8	2.8	2.8	2.5	3.2	3.8	-
	4.5	5.6	3.0	2.8	2.1	2.3	1.9	2.5	2.6	2.5	4.3	-
	5.8	5.1	3.7	2.3	1.8	2.3	1.8	1.9	2.1	1.6	2.7	-
	3.8	5.7	2.9	2.9	2.3	2.7	2.4	2.8	2.5	2.6	3.9	-
	3.4	5.6	2.8	2.6	2.8	2.7	3.3	2.3	2.1	3.0	4.4	-
	4.5	5.5	3.0	2.9	2.2	2.6	2.4	2.4	2.2	2.8	3.4	-
	4.2	5.6	3.0	2.7	2.0	2.4	2.2	2.4	2.4	2.7	3.9	-
	3.7	5.7	3.2	2.8	2.1	2.3	2.0	2.1	2.2	2.3	3.9	-
	5.1	5.1	3.2	2.6	1.8	2.2	2.5	2.3	2.2	2.5	3.2	-
	4.9	5.3	2.9	2.6	1.8	2.0	3.4	2.5	2.1	3.3	3.2	-
	3.1	5.8	2.8	3.0	2.2	2.4	3.6	2.2	1.7	3.1	4.3	-
	3.4	5.2	2.7	2.9	2.3	2.8	3.1	2.5	2.7	2.7	4.1	-
	4.4	5.4	2.9	2.8	2.1	2.1	2.6	2.4	2.4	2.5	3.5	-
	3.5	5.2	2.9	3.1	2.7	2.7	2.4	1.9	2.0	2.4	4.3	-
	4.4	5.3	3.0	2.6	2.0	2.5	2.1	2.2	2.3	2.4	3.5	-
	4.3	5.3	3.1	2.5	1.8	2.4	2.2	2.2	2.1	2.6	3.3	-
	3.7	5.3	3.0	2.5	1.8	2.2	1.9	2.3	2.6	2.3	4.3	-
	4.3	5.3	3.0	2.7	2.0	2.1	2.1	2.2	2.2	2.2	3.8	-
	4.8	5.2	3.2	2.2	1.7	2.3	2.3	2.2	2.1	2.3	3.0	-
	4.2	5.3	2.9	2.9	2.1	2.5	2.5	2.5	2.4	2.4	3.1	-
	6.1	5.1	3.4	2.2	1.3	1.9	1.6	1.7	1.6	1.7	2.7	-
	4.8	5.5	2.9	2.8	1.7	2.2	2.2	2.5	2.3	2.6	2.6	-
	5.9	4.9	3.3	2.2	1.6	2.0	1.7	1.8	1.7	1.9	3.1	-
	4.0	5.5	2.9	2.7	2.0	2.1	2.0	2.5	2.3	2.3	3.4	-
	3.4	5.2	2.7	2.9	2.5	2.7	2.5	2.4	2.1	2.8	3.9	-
	4.0	5.3	2.8	2.6	2.1	2.3	2.3	2.1	2.0	2.6	3.3	-
	3.6	5.5	2.9	2.4	2.1	2.2	1.9	2.1	2.3	2.2	3.8	-
	3.8	5.1	2.8	2.7	1.9	2.5	1.9	2.1	2.4	2.3	3.6	-
	5.2	5.1	3.2	2.2	1.5	1.8	1.8	2.0	1.8	2.2	2.7	-
	2.7	5.7	2.6	2.9	2.3	2.5	3.0	1.9	2.1	3.0	3.8	-

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The full breakdown of results by nation brand

Rank 2022	Rank 2021		Nation Brand	Region	Index Score 2022	Index Score Change	Index Score 2021
91	54	↓		Europe	29.9	-3.5	33.4
92	85	↓		Latin America & Caribbean	29.9	+0.9	29.0
93	-	NEW		Latin America & Caribbean	29.7	-	New
94	-	NEW		Sub-Saharan Africa	29.6	-	New
95	96	↑		Sub-Saharan Africa	29.5	+1.8	27.7
96	86	↓		Sub-Saharan Africa	29.4	+0.5	28.9
97	-	NEW		Europe	29.3	-	New
98	91	↓		Latin America & Caribbean	29.3	+1.0	28.3
99	80	↓		Europe	29.3	-0.5	29.8
100	89	↓		Asia	29.3	+0.7	28.5
102	97	↓		Sub-Saharan Africa	29.1	+1.6	27.5
102	95	↓		Asia	29.1	+1.1	28.0
103	83	↓		Sub-Saharan Africa	29.1	-0.1	29.2
104	-	NEW		Europe	29.1	-	New
105	78	↓		Asia	29.0	-1.0	30.0
106	-	NEW		Asia	28.9	-	New
107	87	↓		Sub-Saharan Africa	28.8	+0.3	28.6
108	90	↓		Asia	28.6	0.0	28.5
109	-	NEW		Sub-Saharan Africa	28.5	-	New
110	98	↓		Sub-Saharan Africa	28.4	+0.9	27.5
111	101	↓		Latin America & Caribbean	28.2	+2.1	26.1
112	88	↓		Sub-Saharan Africa	27.9	-0.7	28.5
113	99	↓		Asia	27.7	+0.4	27.4
114	100	↓		Sub-Saharan Africa	27.7	+0.8	26.9
115	94	↓		Sub-Saharan Africa	27.3	-0.7	28.1
116	105	↓		Sub-Saharan Africa	27.1	+1.9	25.2
117	104	↓		Sub-Saharan Africa	26.5	+1.1	25.4
118	102	↓		Latin America & Caribbean	26.5	+0.5	26.0
119	-	NEW		Sub-Saharan Africa	26.0	-	New
120	103	↓		Latin America & Caribbean	25.3	-0.3	25.6

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The full breakdown of results by nation brand

Nation Brand	Familiarity	Reputation	Influence	Business & Trade	Governance	International Relations	Culture & Heritage	Media & Communication	Education & Science	People & Values	COVID-19 Response	Medals
	3.2	5.6	2.9	2.7	2.1	2.3	1.8	2.3	2.3	2.2	3.4	-
	4.0	5.2	2.8	2.5	1.7	2.3	1.9	2.4	2.0	2.3	3.7	-
	2.7	5.5	2.6	2.7	2.6	2.3	3.3	1.9	2.0	3.1	3.7	-
	3.9	5.5	2.6	2.3	1.9	2.3	2.7	2.0	1.3	3.1	3.8	-
	4.7	5.2	3.0	2.4	1.8	2.1	2.0	2.0	1.9	2.2	2.5	-
	3.5	5.2	2.8	2.6	2.1	2.2	2.4	2.1	2.0	2.4	3.3	-
	3.0	5.3	2.8	2.4	1.8	2.2	2.7	2.4	1.8	2.3	3.7	-
	4.1	5.3	2.9	2.2	1.6	2.1	1.8	2.1	2.1	2.4	3.1	-
	3.3	5.4	2.8	2.5	1.9	2.2	1.6	2.3	2.1	2.0	3.7	-
	4.1	5.3	2.7	2.6	2.0	2.1	2.1	2.0	1.9	2.3	3.3	-
	3.7	5.2	2.8	2.5	2.0	2.3	1.9	2.1	1.9	2.3	3.4	-
	4.3	5.4	2.7	2.0	1.7	1.9	2.1	1.7	1.9	2.1	3.7	-
	4.4	4.8	2.8	2.5	1.9	2.2	1.9	1.9	1.9	2.4	3.2	-
	3.6	5.3	2.6	2.6	2.0	2.3	2.9	1.8	1.3	2.9	3.6	-
	4.5	5.2	2.9	2.1	1.6	1.7	1.7	1.9	2.0	1.9	3.3	-
	3.2	5.3	2.8	2.4	2.0	2.1	3.1	1.7	2.0	2.9	3.1	-
	3.5	5.0	2.7	2.7	2.1	2.1	2.0	2.2	2.0	2.4	3.3	-
	4.0	5.3	2.7	2.4	1.7	2.1	1.8	1.9	2.0	2.0	3.2	-
	3.0	5.2	2.8	2.4	2.0	2.0	2.7	2.0	1.2	2.7	3.7	-
	3.8	5.1	2.7	2.2	1.6	1.9	2.0	1.8	1.7	2.3	3.6	-
	3.5	5.1	2.6	2.4	1.7	2.2	2.0	2.2	1.9	2.4	3.4	-
	3.9	5.0	2.7	2.4	1.5	1.9	2.0	1.9	1.8	2.3	2.9	-
	2.8	5.2	2.8	2.3	2.0	2.2	1.7	2.1	2.1	1.9	3.2	-
	3.5	5.0	2.7	2.4	1.7	1.9	1.6	1.7	1.7	2.1	3.6	-
	3.9	4.8	2.7	2.5	1.5	2.1	1.6	1.8	1.8	2.5	2.7	-
	3.7	5.1	2.8	2.1	1.4	1.8	1.7	1.9	1.9	1.9	2.7	-
	3.4	4.9	2.6	2.5	1.6	1.8	1.7	1.7	1.6	2.4	3.0	-
	3.3	5.0	2.7	2.0	1.4	1.5	1.5	1.9	1.7	1.9	3.2	-
	4.4	5.0	2.9	1.9	0.9	1.6	1.8	1.5	1.0	2.3	1.9	-
	2.8	5.2	2.6	1.8	1.4	1.6	1.7	1.6	1.7	2.1	2.8	-

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