BRITISH COUNCIL
Scotland

Portland

GAUGING INTERNATIONAL PERCEPTIONS:

SCOTLAND AND SOFT POWER

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Cover image: The V&A Dundee opened on 15 September 2018, and is an international centre for design in Scotland, the first ever design museum to be built in the UK outside London. The building was designed by renowned, award-winning Japanese architects Kengo Kuma & Associates, following an international competition and is Kuma's first building in the UK.

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CONTENTS

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1. INTRODUCTION

This report may be the first of its kind to focus specifically on Scottish soft power. While the primary objective is to provide British Council Scotland and its stakeholders with a clear account of Scotland's soft power assets and resources at the present time, alongside recommendations on how these may be enhanced and utilised, we cannot get away from the fact it comes at a time of profound political change. Scotland marked the 20th anniversary of devolution in 2019 and the future holds many challenges.

The convergence of domestic and international challenges will test Scotland's leaders and institutions in the coming years. The acuteness of the challenges ahead mean that Scotland's policymakers must take an ever more active approach in pursuing Scotland's international interests. But how best to do this?

Perhaps the first step in addressing this question is unpacking those complex challenges that lie in wait. Though multifaceted, we can broadly organise these under two themes: global uncertainty and Brexit. Looking first at the global challenges provides perspective on the wider international context in which Scotland must operate. In recent years the central point of debate among foreign policy analysts, commentators, and practitioners has been the state of the current 'rules-based international order'.[1] More specifically, questions have been raised about its future viability as the organising framework that governs the conduct, norms, and laws underpinning international trade, global finance, international law, environmental sustainability, and international security.

Discounting lesser risks, three major threats to the current liberal international order can be observed across the globe, all of which have direct implications for Scotland's own future prosperity and security. The first is the rising tide of populist nationalism that has taken hold, not just in the Western world, but nearly every region of the world. It has been a truly global phenomenon, and it is difficult to attribute the rise of populist nationalism to any one source, issue, or public grievance. The last time nationalism and isolationism gripped the world – particularly in Europe – the consequences were catastrophic. Isolationism, by definition, is a threat to the current rules-based international order. If the trend towards populism continues, there is a real risk that a domino effect will cause an ever-greater number of governments to adopt isolationist, nationalist, and protectionist foreign policies. All of which significantly undermine wider global prosperity and security.

Strange as this might sound in the context of the oft-celebrated British–American 'special relationship', the second threat to the rules-based international order has been the radical shift in US foreign policy. Under the current administration, the US has pivoted away from multilateralism to a zero-sum approach. In pulling out of international agreements, calling into question the value of long-standing alliances like NATO, and hitting traditionally close partners with trade tariffs, 'America First' has generated a great deal of geopolitical uncertainty. As the original architect and underwriter of the rules-based international order, America's now ambivalent attitude calls into question its very existence.

The third major threat to the global order is the long-running trend of an era-defining shift of power from West to East.[2] In theoretical terms, this means a move from a unipolar world to a multipolar one. In practical terms, this means after two decades as the global hegemon, the US is transitioning from a position of global dominance, to one of shared leadership – in a best-case scenario.[3] The shift in power from West to East is not a threat to the global order per se. However, the potential threat to the liberal international order lies in how rising powers, most prominently China and to a lesser extent Russia, use their newfound influence. If rising powers see the current order as unfairly aligned against their interests, they could seek to upend it. In addition to a direct challenge from a rising power, the other threat to the order is a return to fragmented, chaotic geopolitics, where the lack of a globally engaged US results in a breakdown of global order and a set of closed, competing regional spheres of influence.

The above three major trends – rising populist-nationalism across the globe, a radically re-calibrated zero-sum American foreign policy, and the risk of rising powers challenging the status quo – constitute the primary threats to the current rules-based international order. They underscore the increasingly uncertain and challenging global context that Scotland must navigate.

The combined effects of the threats to the rules-based international order and the potential impact of Brexit mean that Scotland faces a challenging international context. To ensure Scotland is prepared to meet these challenges, Scottish policymakers need to ensure they have the capability and capacity to engage effectively with international audiences and potential global partners in pursuing their international priorities.

What does this mean in practice? Firstly, to meet the challenges ahead, a clear account of Scotland's current soft power assets is needed and will be of benefit to all stakeholders. Second, Scotland will need a strong approach to shaping its own global narrative that sets out what it has to offer the international community. Finally, and with that narrative in place, Scotland will need to tell its story loud and clear to raise its profile among international audiences. This means ensuring Scotland has the platforms and international networks required to engage with key international audiences and stakeholders.

As these three steps hint: Scotland's most useful way to pursue objectives beyond its borders is to utilise the full spectrum of soft power. Successive Scottish governments have worked effectively to use the resources at their disposal to engage globally and now given the urgency of the challenge ahead, it is time to take a comprehensive look at Scotland's soft power and see where it might be further developed.

What is soft power?

Soft power is ideally suited to Scotland's unique status as a devolved authority that has many features of an independent country, though remains within the structure of the United Kingdom. Unlike hard power, soft power does not rely on military, economic sanctions, or financial incentives to change behaviour and influence international outcomes. Obviously, Scotland cannot bring any of these elements to bear in its pursuit of international objectives. Soft power, however, relies on attraction and persuasion to change behaviour and influence international events.

According to Joseph Nye, who originally developed the concept, soft power is derived from three primary sources: political values, culture, and foreign policy. It is these sources that determine the extent to which other international actors find a reason to admire, follow, and partner with a country toward some shared objective. Non-state actors – particularly devolved administrations, regional authorities, and cities – can cultivate and deploy soft power; though doing so is not necessarily straightforward or easy.

Indeed, delivering effective foreign policy has never been a simple task for state and non-state actors alike, but as has been argued in *The Soft Power 30* series of reports, that task has grown more complex since the turn of the century. That complexity is manifested in an increasingly multi-polar world, a proliferation of foreign policy actors, and the growth in both the number and reach of communications platforms available to wield influence through campaigns and information.[4]

Without question the most relevant of these trends for the purposes of this study is the diffusion of power. This trend is not exactly new, having been under way for several decades.[5] It has been driven primarily by the forces of globalisation and the economic rise of Asia. The diffusion of power can be seen in two different ways: first, through the lens of geopolitics and economics, and second through the lens of nation-state vs non-state power structures. Power continues to drift from West to East, as the centre of economic and political gravity tracks away from the Atlantic toward the Pacific.[6] Moreover, power is devolving away from nation-state-level governments altogether, toward non-state actors. This state vs non-state component of the diffusion of power is critical to understanding both the challenges and opportunities facing regional governments in global affairs.

In this new context, a host of non-state actors have joined the global fray, each working to shape events in the hope of bending outcomes to their own values, beliefs, and priorities. These newly empowered non-state actors include multilateral organisations, non-governmental organisations, philanthropic organisations, multinational corporations, civil society groups, trade unions, and – perhaps most importantly – devolved governments.

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

It goes without saying that while regional and city governments now have more space, autonomy, and tools at their disposal to engage at an international level, they need to remain focused on issues where they can make an impact and avoid areas where they cannot. This means focusing on areas like trade, investment, tourism, culture, education, environment, people-to-people exchanges, and sport. At the same time, it also means avoiding issues pertaining to defence, war, and international security (though exchanges and shared learning around policing and counter-terrorism are a useful form of cross-border co-operation at the devolved government level). The tools available for shaping international affairs are those that rely on attraction and persuasion. This means a mastery of soft power is paramount for devolved governments hoping to make an impact on the global stage. On terminology used for this report, 'devolved governments' is used to capture a broad range of administrative authorities that exist at the level below the nation-state.

The first hurdle to effectively leveraging soft power for foreign policy objectives is measurement; this is the case for both nation-state or devolved governments. While we have research on how to address measurement for nation-states, there was until recently a gap in our understanding about how to apply this to devolved governments. However, the 2018 publication of the *Wales Soft Power Barometer*, published by the British Council in partnership with Portland, the strategic communications consultancy, addressed this issue by producing the first empirical study on the measurement of the soft power resources of devolved regions. Focused on a set of internationally ambitious and active regional governments, the *Wales Soft Power Barometer* provides a comparative snapshot of the soft power of ten different regions, covering devolved government territories across the UK, Europe, Asia, North America, and Latin America. While that study maintained a specific focus on Wales, the data generated by the research project can be used to the same effect for the other nine devolved territories included in the study.

This report does exactly that by putting a focus specifically on Scottish soft power. The primary objective is to provide British Council Scotland and its stakeholders with a clear account of Scotland's soft power assets and resources, as well as a set of actionable recommendations on how they might enable those assets to be utilised in the context of an exceptionally challenging and complex period ahead.

2. SOFT POWER AND THE RISE OF THE REGIONS

In the new global context, shaped by the three aforementioned mega-trends, relying on military might and economic clout alone cannot deliver on all of a state's international priorities. Shaping global outcomes in many areas now relies on the ability to encourage collaboration and forge networks, using attraction and persuasion, rather than coercion. As Joseph Nye has previously argued, power with others can be more important than power over others.[8]

Soft power is vital for the influence of devolved governments and it is worth starting from a clear definition of the concept. As the term is rooted in International Relations theory, it is best to begin there. Soft power strategies dispense with the traditional carrot and stick approaches of foreign policy, working instead to persuade by constructing and mobilising networks, developing and communicating compelling narratives, establishing international norms, building coalitions, and drawing on the key resources that endear one country to another.[9] In simple terms, 'hard power is push; soft power is pull'.[10]

In defining soft power, it is also important to highlight its sources. As explained in the section above, Joseph Nye has previously pointed to three primary sources of soft power: culture, political values, and foreign policy.[11] For Nye, culture that promotes universal values that international audiences can readily identify with, makes them naturally attractive. Culture, for the purposes of soft power, captures the high-brow of art museums as well as the popular culture of televison and music. Political values refers to upholding individual freedoms and liberty, as well as rule of law and sound public institutions. Nye's third source of soft power – foreign policy – can be understood as the extent to which the subject in question is seen as making a positive global contribution. Phrased as a question, is a country (or region) a force for good or ill in the world?

The global rise of the devolved region

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

The rise of regions – as well as cities – to the global stage has come about for three key reasons. First, the nature of globalisation has brought regions and cities into more interdependent international relationships. Growing linkages between localities across borders means regions and cities have more to gain (and lose) from engaging (or failing to engage) internationally. The flow of foreign direct investment (FDI), competition for globally mobile talent, access to export markets, and the global higher education market all depend heavily on having a compelling offer that resonates with potential international partners.[12] Second, more and more regions with devolved structures of government now have the capacity, capability, and machinery required to reach international audiences, independently of their nation-state governments. This means regional governments are capable of setting their own international priorities and then engaging directly with potential global partners to voice – and ideally deliver – on those priorities. Third, in most instances, national-level governments have adopted a supportive stance on their regional governments engaging in public diplomacy activity abroad, as the goodwill generated by efforts from regional governments tends to accrue at the nation-state level.[13]

Devolved governments actively engaging in public diplomacy efforts has been an accepted fact in international relations literature for some time now. Nearly 30 years ago, two international relations scholars, Panayotis Soldatos and Ivo Duchacek, developed the concept of 'paradiplomacy' – an abbreviation of 'parallel diplomacy'.[14] Paradiplomacy describes the process of foreign policy carried out by devolved governments. There are examples of regional administrations that have been practising paradiplomacy – at least on a basic level – for decades. At present 40 out of 50 American states operate international trade offices overseas. The Canadian province of Quebec has run an international representative office since the 1940s. With its focus on partnerships, Scotland too has a network of government and Scottish Development International (SDI) offices, totalling more than 60 hubs around the world and contributing to Scotland's strong global presence. Thus, paradiplomacy carried out by devolved governments has been practised for decades. The key question, then, is how can it be done ever more effectively?

For devolved governments to effectively engage international audiences, they need to understand, develop, and work with their own unique soft power assets. While there are innumerable ways to develop soft power resources, leveraging them rests largely on the practice of public diplomacy. The simplest definition of public diplomacy is the process of a government speaking directly with foreign audiences in an effort to bring greater understanding of that government's values, priorities, and policies.[15] According to public diplomacy scholar Jay Wang, public diplomacy is generally carried out with three broad objectives in mind:[16]

1. promoting a country's national goals and policies
2. communicating a nation's ideals, beliefs, and values
3. building common understanding and relationships across borders.

The first objective of public diplomacy, which pertains more to a given country's overarching nation-state-level priorities and foreign policy, is arguably best left to the nation-state government. In many cases, the second and third objectives outlined above can and should be carried out by regional governments.[17] Looking at the second objective, this is probably the greatest public diplomacy overlap between nation-state and devolved governments. Both central and regional governments have a role to play in communicating a nation-state's (and region's) ideals, beliefs, and values. Turning to the third objective of public diplomacy, this is arguably better suited to devolved governments. When it comes to building direct relationships across borders, the closer one can get to person-to-person contact, the more powerful those relationships are likely to be. Regional and local governments are not only better able to operate at a level closer to individual citizens, but often they do not carry any of the political baggage that a nation-state level government might have.

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

- political values and policy
- culture
- heritage.

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

- education
- tourism
- exchange programmes
- business partnerships.

Scotland's approach and major initiatives

Since the devolution of power, the Scottish government has undertaken a range of efforts to raise the country's global standing through both policy initiatives and campaigns. The gains made to date in promoting Scotland's soft power, however, could go further.

The backbone of all its international efforts, Scotland's international policy statement is founded on partnership and outlines Scotland's key priorities in good global citizenship, ethical leadership, and international development. The strong focus on international development also culminated in the first ever Scottish government contribution to the *International Development Report.* These provide good guidelines and a core structure for Scotland's international branding strategy moving forward.

Established in 2001, SDI supports international investors in Scotland and is critical for promoting Scotland's tech and enterprise internationally. Beyond Scotland, SDI also has a strong global presence with its 30 international offices across the Americas, Asia, Pacific, Europe, Middle East, and Africa. As the international arm of Scotland's enterprise agencies, SDI is business-centric and economy-driven in all it does. Focusing on innovation, infrastructure, and higher education in its campaigns and promotional material, SDI is speaking to a traditional business-first audience to position Scotland as an attractive place for enterprises to grow. SDI's global network is – without question – an important soft power asset. There are questions, however, about how it might expand its focus beyond traditional enterprise and investment, and seek to promote other economic opportunities linked more directly to Scotland's soft power assets – particularly creative and cultural industries.

The Scotland is Now campaign launched in April 2018 with the aim of attracting more students, investors, migrants, and tourists to boost Scotland's economy. It crosses various domains and provides a holistic view of life in Scotland. While it would be premature to rate the success of the campaign at this stage, Scotland is Now represents a step in the right direction, and can be further promoted beyond North America, London, and China – its initial target locations – for a truly global campaign that includes Scotland's other priority countries such as India and Japan. Scotland is Now also has the potential to be developed into a full mainstream and digital media campaign that transcends national borders.

Education is a powerful tool that Scotland has leveraged to engage with international partners, as seen in its prominence in the Scotland is Now campaign. Study in Scotland is a targeted campaign that promotes students. Beyond its remarkable higher education standards, Study in Scotland promotes the wider experience of student life in Scotland, and acts as the one-stop information centre for interested applicants. On a macro-level, Connected Scotland is a partnership that prioritises collaboration between eight Scottish institutions that have a stake in Scotland's education sector. Through the sharing of resources, networks, and expertise, Connected Scotland raises the profile of its higher education sector internationally, with a focus on emerging markets. It lays out a framework of key messages that can be tailored for international audiences engaging with Scotland's higher education institutions.

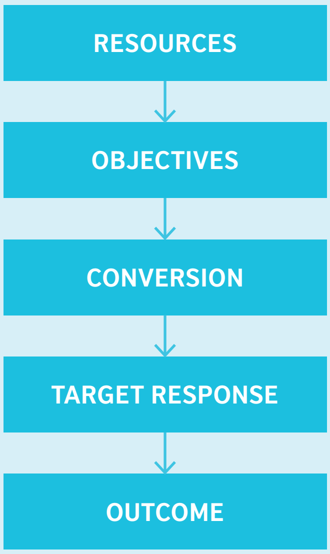
The Scottish government also proactively works to develop the competitiveness and relative international attractiveness of Scottish enterprises. The complete strategic plan published by the Scottish Enterprise and Skills Board outlines the direction enterprises and agencies should take to improve productivity, sustainable economic growth, and global appeal. The framework can be utilised by Scottish enterprises to assess performance and work towards greater improvement. This can increase the attractiveness of Scotland's economic model in terms of its competitiveness and capacity for innovation, which would increase its soft power assets.

Soft power approaches are vital for devolved governments' international objectives, and provides them with a number of tools to engage with potential international partners and build meaningful cross-border relationships, some of which have been discussed above. The methodology used to produce the regional soft power index – outlined in the following section – takes the above into account and allows us to analyse the comparative soft power resources of Scotland and nine other devolved government regions from around the world.

3. METHODOLOGY

As soft power is their main means of influence, those devolved governments most adept in using it will be better placed to attract investment, tourists, students, and talent, as well as provide leadership on global issues like environmental sustainability or international regulations. Achieving success on these fronts ultimately leads to better outcomes for the citizens and residents of a region. As has been argued above, the first step in the process of converting soft power into a successful outcome is identifying the resources that will affect the target(s) in question. Joseph Nye's own model for the conversion of soft power (illustrated in Figure 1) reflects this, making resources the first step in the process.

Figure 1
Soft power conversion process



SOURCE: Nye, J. (2011)
The Future of Power

The purpose of this report is to draw on the analytical framework of the regional soft power index used for the *Wales Soft Power Barometer* and apply it to Scotland. Using the data from the regional soft power index of that study helps address this first step in the soft power conversion process for Scotland. The regional soft power index draws heavily on Portland and the Centre on Public Diplomacy's *Soft Power 30* framework as a starting point, but adapts it for an analysis of devolved regions.[18]

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

Objective data

The objective data is drawn from a range of different sources and is structured into six categories, each one effectively functioning as a sub-index with an individual score for each region. The six sub-indices are: Government, Culture, Global engagement, Education, Digital, and Enterprise. The framework of categories was adapted from *The Soft Power 30* index, which itself is built on a survey of existing academic literature on soft power.

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

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

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

The ability of a region to attract foreign students, or facilitate exchanges, is a powerful tool of public diplomacy. Foreign student exchanges have been shown to have positive indirect 'ripple effects' when returning students advocate on behalf of their host country of study.[19] The Education sub-index aims to capture this phenomenon as well as the quality of regions' universities and overall performance of their education systems.

The Enterprise sub-index is not a measure of economic power or output. Rather, this sub-index aims to capture the relative attractiveness of a region's economic model in terms of its competitiveness, capacity for innovation, and ability to foster enterprise and commerce.

The Digital sub-index brings an important new component to the measure of soft power. The way that technology has transformed everyday life over the last two decades is hard to over-exaggerate. This sub-index aims to capture the extent to which regions have embraced technology, how well they are connected to the digital world, and their use of digital engagement through social media platforms.

Subjective data

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

- Canada
- China
- United Arab Emirates (UAE)
- France
- Germany
- India
- Ireland
- Japan
- Qatar
- US.

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

- Cuisine
- Welcoming to Tourists
- Luxury goods
- Political values
- Liveability
- Culture
- Sport.

As with Portland's *Soft Power 30* study, we established individual weighting for the above polling categories, based on key driver analysis. This was done through a least squares regression model. In addition to the above seven metrics, survey respondents were asked to score regions on overall favourability. The overall favourability data was used to develop the regression model, where 'overall favourability' serves the dependent variable, and above polling categories are the independent variables. The results of the regression analysis produce the weighting for each of the seven categories, which reflects the importance survey respondents place on each category in forming their overall favourability of a region. The regression model allows each of the subjective metrics to be appropriately weighted in the final calculation of the index.

Based on the calculation of the regression model, the different categories were assigned the following weighting, reflecting their importance in shaping the overall favourability of a region:

- Welcoming to Tourists – 25.1%
- Liveability – 18.8%
- Political values – 16.2%
- Luxury products – 15.2%
- Cuisine – 14.5%
- Culture – 5.7%
- Sport – 4.5%

Devolved regions included in the study

Ten regions selected for the index were chosen according to considered criteria, but not an overly rigid formula. As the original study was commissioned by British Council Wales, the selection process started with Wales. Other regions were then chosen based on several considerations, including level of devolved government authority, GDP size, population size, geographic spread, level of development, and history of international ambitions and engagement. The results of the selection process yielded a final set of ten regions:

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

Challenges and shortcomings

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

The second challenge, and certainly related to the first, is the issue of comparability of regions across international borders. Each nation-state-level government has its own constitution or legal conventions that have led to a unique relationship between central and regional devolved governments. For example, California is not perfectly comparable to Hainan Province in China, or Lombardy in Italy. Despite the vast differences that exist between a diverse set of 195 nation-states around the world, there remains a clear set of attributes, laws, norms, and conventions that govern what they are, the constraints they operate in, and a basic concept of full sovereignty, thus making them broadly comparable. The same cannot be said for devolved government regions, which does make direct comparison more challenging.

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

The fourth and final methodological challenge is the level of existing knowledge on regions in the collective mind of international public opinion. When it comes to international polling, nation-states tend to have a higher level of public awareness amongst international audiences. The level of awareness will vary between nation-states – consider the US vs Bhutan. Even with this variation, most nation-states will have an inbuilt advantage over devolved regions when it comes to overall public awareness around the globe. According to the polling carried out for this regional soft power index, on average one third of respondents felt they had a high level of knowledge on any given region, while one quarter of respondents felt that they had ‘some knowledge’ of a given region. The table below reports the percentage of respondents saying they have a high level of knowledge for each region in the index.

The level of public awareness will vary region to region, but the fact of the matter is that regions tend to start from a lower base of operating knowledge when trying to engage with international publics. This is both a challenge and an opportunity. While it may be hard to get traction initially, a given region might be a blank slate for some international audiences, meaning perceptions are largely unformed and thus potentially more malleable.

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

While the above challenges have certainly made the exercise of measuring regional (as opposed to nation-state-level) soft power more difficult, we still feel the index created for this study provides a useful framework for measuring and comparing the soft power resources of devolved regions. Employing the methodology set out above, the following section sets out the overall results of the regional soft power index and provides a deep-dive analysis on Scotland’s soft power resources.

4. RESULTS

Upon collection of the data, running it through a normalisation process, and calculating the final scores for each devolved region, Quebec finished at the top of the regional soft power index. Quebec performs well across both the objective and subjective metrics. It tops the Government sub-index and comes in second in the Education and Enterprise sub-indices, offsetting a surprisingly poor performance in the Digital sub-index. Quebec's high scores in human development, equality, and human rights helped deliver its top spot in the Government sub-index. This is complemented by positive perceptions of its political values, receiving high polling scores from all the countries, an impressive feat considering the divergence in political philosophies and values across the surveyed countries. Famous for its booming knowledge economy, Quebec is one of the highest spenders globally in research and development (R&D), the effects of which are borne out in numerous Nobel laureates in science, and an economy with over one million people employed in the science and technology sector.

OVERALL RESULTS

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

Among the ten regions, Scotland puts in a strong and consistent performance across the objective sub-indices, coming top in Education, Digital, and Enterprise, and among the top five in Engagement, Culture, and Government. However, it is somewhat let down by low polling scores, resulting in its overall second place, which warrants a deeper exploration and thinking as to how a gap between objectively measured soft power assets and international perceptions can be closed.

Rounding out the top three regions, Flanders performed particularly well on most of the objective data sub-indices, but – like Scotland – fared less well on the polling. It is interesting that Flanders seems to suffer a bit from a gap between its objectively assessed soft power resources and international public opinion. It is hard to know exactly why this gap exists. Looking at *The Soft Power 30* data, Belgium experiences a similar phenomenon. Belgium's overall position in the 2015, 2016, 2017, and 2018 *Soft Power 30* ranking outperforms its performance in the polling data. This suggests that Belgium's soft power assets are not being leveraged as effectively as they might be.

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

The real value of the index lies in breaking down regions' performances by each sub-index and assessing strengths and weaknesses. Likewise, the international polling holds insights on what elements of a country are attractive in the collective mind of international public opinion.

OBJECTIVE DATA

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

POLLING DATA

Hokkaido outperforms all other regions in the international polling. The survey data reported that perceptions towards Hokkaido's consumer and luxury goods, as well as its culture, are particularly strong. This is perhaps unsurprising; Japan finishes at an impressive third place in the aggregated polling score for 2018's *The Soft Power 30*, and much of its reputation as an Asian winter destination is attributed to Hokkaido, famous for its ski resorts, hot springs, and the Sapporo Snow Festival. Hokkaido scores consistently well across the polling categories, ranking in the top three in seven out of eight of the polling categories. Hokkaido also performs much better than the only other Asian region on the list, Jeju. However, with China being the main country polled in East Asia, Hokkaido receives its highest scores from outside the immediate region, namely Qatar and France.

Quebec comes second in the polling, boosted by top performances in friendliness, political values and liveability. The only region in North America with a French-speaking majority, and home to the second-largest French-speaking city in the world after Paris, Quebec is a favourite among global French-speaking communities. Indeed, France's highest scores in the polling go to Quebec in four of the categories. Quebec's popularity, however, is not limited to French-speaking communities. A growing bilingual community, and the availability of public sector services such as health and education in English, has made Quebec a popular destination for immigrants in the last decade. At the time of writing, Montreal – Quebec's largest city – is ranked the 12th most liveable city by the Economist Intelligence Unit, and the best city in the world to be a university student by the QS World University Rankings, no doubt contributing to Quebec's attractiveness as a place to visit for work and study.

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

POLLING RESULTS BREAKDOWN

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

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

5. SCOTLAND DEEP-DIVE

OVERALL RESULTS

Engagement	Culture	Government	Education	Digital	Enterprise	Polling
4	2	3	1	1	1	6

As reported above, Scotland finishes second overall among the ten regions included in the study, ahead of fellow UK devolved countries Wales and Northern Ireland. Scotland's second place rank is driven by a consistently strong performance across the objective data sub-indices. Looking at the objective data, Scotland's strongest soft power assets lie in Digital, Education, and Enterprise, with some room for improvement in Engagement. The polling data, however, tells a different story and generates some questions that can be addressed in analysing Scotland's soft power and thinking about how its assets can be better leveraged through international engagement and public diplomacy platforms.

In terms of relative performance within the UK, Scotland puts in the best performance of the UK's three devolved regions included in the study. Scotland outperforms Wales and Northern Ireland in every single objective data sub-index, as well as the international polling.

BREAKDOWN OF OBJECTIVE DATA

Education

Scotland topped the Education sub-index, driven in large part by the relatively high number of top global universities in Scotland, particularly the University of Edinburgh, the University of Glasgow, and St Andrew's University, as well as others that attract many international students like the University of Strathclyde and Heriot-Watt University. Scotland's impressive stable of globally competitive universities also supports its high intake of international students. As the destination of choice for more than 50,000 students from over 180 countries outside the UK, Scotland's higher education sector has a reputation for being an attractive, friendly, and safe destination for international students.[20] In addition to welcoming students from abroad, some Scottish universities have gone out into the world, establishing campuses or partnerships with international institutions, granting them a physical presence in a diverse set of locations that touches nearly every part of the globe including China, Hong Kong, India, Malaysia, Singapore, South Korea, UAE, and the US. That Scotland's university graduates have the highest record of securing professional jobs in the UK likely serves as an additional pull for international students to choose Scotland for their higher education.[21] As evidenced in the data, Scotland's university sector is really the crown jewel in its array of soft power assets.

Scotland is also the highest spender on education at 7.7 per cent of its GDP. Less of a bright spot, however, in the 2016 cycle, Scotland received the third lowest average score on the Programme for International Student Assessment (PISA) by the Organisation for Economic Co-operation and Development (OECD).[22] PISA is an assessment of 15-year-olds based on their performance in mathematics, science and reading. Scotland's underperformance in secondary education – compared to the outperforming higher education sector – is the only weak point in Scotland's education-related soft power assets.

International higher education is increasingly seen as an export industry around the world and a number of governments are working to recruit more international students. Connected Scotland should leverage the benefits of collaboration and pooled resources to do more direct outreach to education institutions abroad, and take part in major international education fairs, events, and expos. Likewise, direct partnerships with universities abroad or international campuses could further raise the profile of Scottish universities worldwide.

Australia and Canada are both working to catch up with the US and UK (the top two countries for international students). Even non-English speaking countries are adapting courses and rolling out English-taught degrees to compete with the dominant Anglophone world of universities. Scotland has a long, deep, and proud intellectual history, and it is reassuring to see its universities carrying this forward. Scotland should use this historic claim to driving Enlightenment thinking, science, and engineering, set in a modern context that makes the most of its universities for international students, researchers, and even private companies in research-intensive industries. Education should be the cornerstone of any comprehensive soft power strategy Scotland seeks to develop and execute.

Enterprise

Scotland finished top of the Enterprise sub-index, a reflection of its attractiveness as a place for businesses, its competitive regulatory framework, and its capacity for innovation. Scotland has the highest value of FDI of all the regions included in the study, illustrating the high confidence international businesses and investors have had in Scotland's economy. Among other factors, Scotland's focus on developing niche propositions in fintech and subsea technology, and the establishment of Scotland as a global centre for collaborative innovation and investment, has allowed Scotland to emerge as the UK's most attractive location for FDI outside of London. Scotland is host to some major global companies, including the Royal Bank of Scotland, Standard Life Aberdeen, and Scottish & Southern Energy.

Scotland is also seen as a trustworthy and safe place for business. While based on an overall assessment of the UK, it is worth noting that Scotland performed the best on Transparency International's Corruption Perceptions Index, coming in eighth out of 180 places on the ranking. Similarly, Scotland, as part of the UK, also achieved the best results on The Heritage Foundation's Index of Economic Freedom, placing eighth out of 180 countries.

Scotland's excellence in Enterprise, however, does not mean there are no areas for improvement. Scotland's comparatively low number of small and medium-sized enterprises (SMEs) accounts for only 55 per cent of total employment, lower than eight other regions included in the index. In addition, Scotland's R&D spending is only at 1.39 per cent of its total GDP, far less than that of Catalonia, Flanders, Hokkaido, and Quebec. It is beyond the scope of this study to recommend exactly how to boost the number of SMEs and encourage greater R&D spending, but the government could explore policy options that might lift both of these metrics. It is important for Scotland to project itself as a fair, transparent, trustworthy, and innovative location for businesses and investors – particularly in the sectors where it has a clear and compelling offer like financial services, fintech, and maritime industries. Scotland would also benefit from greater tie-ups between industry and universities. Not to say this is not being done, but whatever efforts could be made to showcase industry – university partnerships or promote new collaborations internationally would benefit Scottish soft power.

Indeed, some sound ideas have recently been generated that would benefit Scotland's soft power in the enterprise space. The Scottish government's Enterprise and Skills Board published a new strategic plan in October 2018, which includes recommendations that – if fully implemented – will have a positive impact on Scotland's soft power. There has been a significant amount of work done in the area with calls for more Scottish students to take international opportunities for work and study, and calls for bringing more international students to Scottish universities. There has been a direct appeal for the re-introduction of the post-study work visa, which will be a boon for international student recruitment once implemented. Another sound recommendation calls for more ministerial visits to priority export market countries to strengthen government-to-government and government-to-business links. This should be a top priority, as it will be a clear, visible sign of Scotland's political commitment to maintaining an open economy and strengthening global links in a post-Brexit context.

Digital

As with Education and Enterprise, Scotland topped the Digital sub-index, though it should be noted, it did so largely through metrics that are only available at the national (not devolved) level. Across the UK, government online services are advanced, and e-participation is high. Compared to other countries polled, the UK as a whole has the highest number of secure internet servers, as well as high numbers of fixed broadband subscriptions and internet users with strong internet bandwidth. This indicates that Scotland, as part of the UK, benefits from a strong digital infrastructure, which ultimately benefits citizens and businesses.

This is further underpinned by the Scottish government's digital efforts via its national digital strategy, '*Realising Scotland's full potential in a digital world*', which seeks to digitise public services, help Scottish businesses leverage digital technologies to grow and compete internationally, and improve and extend Scotland's digital infrastructure through initiatives such as the Digital Scotland Superfast Broadband Programme. In turn, the national digital strategy has positive knock-on effects for Scotland's performance in the Enterprise sub-index.

Where Scotland also performs well, through its own merit, is on metrics for digital diplomacy. As with *The Soft Power 30*, the regional soft power index assesses devolved governments' digital networks. VisitScotland, Scotland's national tourist organisation, boasts a strong social media presence, with the highest number of Facebook and Twitter followers among any comparable body in the other devolved regions. Moreover, Scotland's First Minister, Nicola Sturgeon, has the largest following of any devolved government head from regions included in the study. Digital diplomacy can serve as a powerful tool for Scotland to shape its international branding and should be leveraged as a platform for international narratives that promote Scotland abroad.

Culture

Scotland finished second in the Culture sub-index, falling just behind Catalonia. A strong performance, it shows that Scotland has a well-balanced cultural offering across art, film, media, and sports. Scotland posts the highest number of films appearing in major film festivals of any region included in the index. Scotland has the second highest number of museums and libraries, and the second highest number of top museums, including the National Galleries of Scotland and the National Museum of Scotland. There are 52 newspapers operating in Scotland, the highest figure among regions studied. Known as the 'Home of Golf', Scotland also has a high number of professional sports teams in football and rugby. Despite having six UNESCO World Heritage Sites (putting it tied for second place), the total number of international tourist arrivals to Scotland is relatively low compared to the other ten devolved regions. Only Northern Ireland and Wales welcome fewer international tourists.

VisitScotland, launched Tourism Scotland 2020 (TS2020) in 2012 to boost growth in the tourism sector, but largely focused on tourism from other parts of the UK and neighbouring Europe, possibly neglecting the larger Asian market. Given that non-European tourists would be travelling from further abroad, Scotland should consider how it could further leverage major events like the Edinburgh festivals – the largest arts and cultural festival platform in the world – in markets farther afield, ideally to attract longer-staying tourists from beyond the European continent. As the culture sub-index shows, Scotland has plenty on offer when it comes to cultural assets, but this has not translated into commensurate numbers of international visitors.

Government

At third place, Scotland performed relatively well in the Government sub-index, achieving high scores in metrics on human development, number of think tanks, and human rights. It also benefits from a comparatively strong level of devolved authority over its own affairs, according to the Devolved Authority Index. Only Flanders and Quebec outperform Scotland on this metric. Where Scotland underperforms tends to be on metrics that are assessed at the national level. These include metrics on gender equality and press freedom.[23]

Scotland also performs relatively poorly on income inequality. Oxfam Scotland has highlighted a widening inequality gap that is evidenced in both the Palma ratio and the Gini co-efficient. Both reflect sharp increases in recent years and suggest that the richest one per cent in Scotland has more wealth than the bottom 50 per cent combined. There is no easy answer for addressing this issue, but it should be recognised as not only a domestic policy imperative but one that has international reputation implications too.

Engagement

Scotland ranked fourth in the Engagement sub-index. Relative to other regions, Scotland received middling scores across the Engagement metrics. It falls behind Catalonia and Flanders in the number of trade and investment offices abroad, consulate generals in the region, as well as international sister city partnerships. We can think of these as the key components of Scotland's official 'paradiplomacy' machinery, and thus important to its soft power. In underperforming – relative to the other devolved regions – in these areas, Scotland's ability to directly engage with international audiences and build partnerships abroad is limited.

Following the methodology of *The Soft Power 30*, environmental leadership is included as an important component of the Engagement sub-index. The logic underpinning this is Nye's argument that a country's soft power rests in large part on the extent to which it is seen as a net contributor to the international community. Sound environmentalism is a clear net positive contribution to that community, and thus a valid metric for inclusion.

In practice, Scotland performs well on environmentalism, but could do more to contribute internationally at a political level. While Scotland achieved the best scores for air quality, it is worth noting that Scotland is not a member of the Network of Regional Governments for Sustainable Development (NRG4SD), a global network that represents regional governments in the fields of climate change and sustainable development. Scotland should consider increasing participation in international organisations to raise its profile, find its voice on environmentalism, and share its expertise with the world. Scotland is undoubtedly among world-leading regions and countries in the use of renewable energy. The Scottish government's aim to generate 50 per cent of Scotland's overall energy consumption from renewable sources by 2030 is a perfect case in point. They go further by aiming to have de-carbonised the energy system in Scotland almost completely by 2050. Particularly as Scotland prepares for a post-Brexit world, it should endeavour to build on shared interests in global issues and make renewable energy and green policy core to its global narrative. To communicate that narrative more effectively, it may need to expand its formal 'paradiplomatic' network and machinery to enhance Scottish ties around the world.

BREAKDOWN OF POLLING RESULTS

Polling results

		Cuisine	Welcoming to tourists	Luxury goods	Political values	Visit for work/study	Culture	Sports
Rank	6	8	5	7	6	4	4	3
Score	6.62	6.42	7.18	6.59	6.44	6.92	7.18	6.37

Scotland placed sixth overall in the aggregated scores across all categories for the international polling. Taking the aggregated polling data as its own sub-index, this was Scotland's worst ranking across the regional soft power index. If we break it down into its constituent parts, Scotland is most positively viewed by global audiences for its sporting culture. Known as the 'Home of Golf', Scotland is also well-represented in football, rugby, and tennis. Scotland falls behind Catalonia and Wales in the polling on sports, most likely due to FC Barcelona's outsized global popularity and Wales' strength in rugby – as well as its homegrown mega-star Gareth Bale. However, there are real opportunities for Scotland to better leverage its sporting culture through sports diplomacy, building on the international appeal of golf and football, as well as the increasing popularity of rugby. Indeed, Japan hosted the 2019 Rugby World Cup and exposed new and growing audiences in Asia to rugby, where Scotland had an opportunity to showcase itself as a strong sporting nation.

Despite being home to a wealth of diverse cultural assets, as illustrated by the objective data, Scotland's objectively assessed strengths in culture do not seem to translate into the polling results one might expect. At fourth, it falls behind Hokkaido, Catalonia, and Corsica in polling on culture, though it outranks its UK neighbours Wales and Northern Ireland. In addition to comparatively low tourism figures shown in the objective data, Scotland also receives poor polling scores in being welcoming to tourists, coming in fifth and falling behind Quebec, Hokkaido, Catalonia, and Flanders. As Scotland ramps up efforts in tourism promotion, it should certainly seek to leverage key cultural assets including art, film, music and sport. For example, Scotland should consider what more could be done to promote the Edinburgh festivals, particularly in untapped markets, beyond the traditional European and Anglophone countries.

The British Council plays an important role in positioning Scotland as more than a tourist destination, but also a place to live, work, and study. Scotland came fourth in the polling on liveability, falling behind Quebec, Hokkaido, and Corsica, indicating that there is room for improvement. Home to internationally-renowned higher education institutions such as the University of Edinburgh, the University of Glasgow, and St Andrew's University, Scotland should further capitalise on its friendliness towards foreign students in building a reputation as a premier destination for higher education. Edinburgh is also said to be the fastest growing tech hub in the UK, providing Scotland with the opportunity to brand itself as the ideal destination for tech professionals to live and work. In addition to promoting Scotland's unique tourist attractions and arts and culture scene, the British Council should ensure that Scotland's educational, cultural and creative industries opportunities are being highlighted to global audiences.

Scotland records relatively weaker polling scores in political values, luxury goods, and cuisine. The worst result across the polling categories comes in cuisine. Perhaps unfair, but this is likely an area where entrenched – if not fully informed – views of Scottish cuisine will put it at a relative disadvantage. Obviously, Scotland is not without its food and drink assets, like Scotch whisky, a global brand in and of itself. Scotland could consider ways to promote luxury goods through whisky tourism further. Even as Scotland's whisky distilleries welcomed a record number of visitors in 2017, these figures will need to continue to climb, especially with international visitors.

In general, Scotland received its highest scores from Canada and China, and received its lowest scores from Japan and Germany. When comparing the average score given by each country across all other regions, Scotland performed well in Canada and Ireland, but less well in Dubai, Qatar, Japan, and India. Looking specifically at 'Cuisine', Scotland received below average scores from all countries surveyed for the study. Scotland also received below average polling scores across all categories from Qatar and India.

Overall favourability											
	Dubai	Germany	Qatar	France	Canada	Japan	US	India	China	Ireland	**Total**
Scotland	6.71	5.43	6.90	6.99	7.47	4.17	6.66	7.80	7.34	6.77	6.62
Average	6.83	5.09	7.23	6.88	6.99	4.54	6.51	8.02	7.33	6.28	6.59
Difference	**-0.12**	**0.34**	**-0.33**	**0.11**	**0.48**	**-0.37**	**0.15**	**-0.22**	**0.01**	**0.49**	**0.03**

Scotland's engagement with the rest of the world is guided by the Scottish government's International Framework, and its corresponding international policy statement clearly identifies key markets of interest: Europe, US, Canada and China. Fortunately, these key markets report better than average scores for Scotland in the polling.

Despite the Scottish government's refreshed India engagement strategy, Scotland performed relatively poorly across all categories in India. Cultural collaborations between Scotland and India in dance, film, literature, museums, music, textiles, theatre and visual arts seek to promote mutual understanding of both cultures. Scotland imports Indian culture in the form of Bollywood film screenings, annual Mela festivals and Bollywood dance performances. But more can be done to export Scottish culture in the areas of sports and food to India. This would entice more Indian visitors to Scotland, boosting tourism and likely improving perceptions of liveability for Scotland.

While there have been more than 75,000 visitors from India to Scotland over three years, more than double, 173,610, Chinese tourists visited Edinburgh Castle in 2017 alone, accounting for more than 10 per cent of total visits to the historical site. Scotland's China engagement strategy has been particularly successful on the cultural front, having renewed a five-year cultural memorandum of understanding in 2015, and signed a co-operation agreement between Edinburgh festivals and the Shanghai International Festival. No doubt, the fact that the Scottish government has an overseas office in China has helped to bring its China engagement strategy to life and build stronger links through a presence on the ground. Given that China scored Scotland most poorly in cuisine, Scotland may wish to venture into a food festival or explore Food & Beverage programme collaborations with Chinese partners moving forward. The general success of Scotland's cultural diplomacy in China may also be used as a best practice model for Scotland's engagement with India, Japan, Qatar, and UAE.

Scotland performed above the average score in liveability and sports. While Germany and Canada gave Scotland particularly strong scores in liveability, Qatar, Japan, and India scored Scotland poorly. In sports, Scotland received particularly strong scores from Germany and Ireland, but received poor scores from Dubai, Qatar, and the US. Given Scotland's strong sporting culture in football, rugby, tennis, and golf, Scotland should consider employing sports diplomacy tools such as engaging in friendly matches or exchanges with Dubai, Qatar and the US. To better position itself as a place to live, work and study, Scotland should also highlight the educational and business opportunities in the region. Lastly, it is worth noting the first minister's recent referencing of the climate emergency in several public for a as a further area of potential appeal to international audiences.

While the polling results provide useful insight into areas where perceptions of Scotland can be improved, we need to also consider where the opportunities lie, and where they are limited. As Scotland further develops its soft power assets, it is important that it builds on its key strengths in digital, enterprise and sports, while looking into strategies for improving its reputation in Dubai, Qatar, Japan and India, to ultimately improve Scotland's global standing.

International Polling Scores

Cuisine

	Dubai	Germany	Qatar	France	Canada	Japan	US	India	China	Ireland	**Total**
Scotland	6.84	5.41	7.36	5.78	6.70	4.19	6.39	8.21	6.91	6.39	6.42
Average	7.16	5.76	7.58	6.52	6.98	4.80	6.83	8.27	7.27	6.58	6.80
Difference	**-0.32**	**-0.35**	**-0.22**	**-0.74**	**-0.28**	**-0.61**	**-0.44**	**-0.06**	**-0.36**	**-0.19**	**-0.38**

Welcoming to Tourists

	Dubai	Germany	Qatar	France	Canada	Japan	US	India	China	Ireland	**Total**
Scotland	7.22	6.89	7.50	7.16	7.83	4.62	7.46	8.23	7.70	7.21	7.18
Average	7.36	6.53	7.67	7.15	7.43	4.98	7.20	8.38	7.55	6.82	7.11
Difference	**-0.14**	**0.36**	**-0.17**	**0.01**	**0.40**	**-0.36**	**0.26**	**-0.15**	**0.15**	**0.39**	**0.07**

Luxury goods											
	Dubai	Germany	Qatar	France	Canada	Japan	US	India	China	Ireland	**Total**
Scotland	7.16	5.86	7.35	6.13	6.71	4.09	6.68	8.08	7.19	6.68	6.59
Average	7.28	5.51	7.64	6.15	6.41	4.52	6.71	8.31	7.31	6.30	6.61
Difference	**-0.12**	**0.35**	**-0.29**	**-0.02**	**0.30**	**-0.43**	**-0.03**	**-0.23**	**-0.12**	**0.38**	**-0.02**

Political values											
	Dubai	Germany	Qatar	France	Canada	Japan	US	India	China	Ireland	**Total**
Scotland	6.99	5.84	7.16	6.33	6.99	3.91	6.30	7.84	6.98	6.09	6.44
Average	6.98	5.53	7.44	6.23	6.31	4.28	6.06	8.09	6.88	5.55	6.34
Difference	**0.01**	**0.31**	**-0.28**	**0.10**	**0.68**	**-0.37**	**0.24**	**-0.25**	**0.10**	**0.54**	**0.10**

Liveability											
	Dubai	Germany	Qatar	France	Canada	Japan	US	India	China	Ireland	**Total**
Scotland	7.37	6.53	7.48	6.37	7.12	4.14	7.40	8.24	7.59	6.84	6.92
Average	7.31	5.88	7.66	6.37	6.53	4.54	7.01	8.30	7.46	6.49	6.80
Difference	**0.06**	**0.65**	**-0.18**	**0.00**	**0.59**	**-0.40**	**0.39**	**-0.06**	**0.13**	**0.35**	**0.12**

Culture											
	Dubai	Germany	Qatar	France	Canada	Japan	US	India	China	Ireland	**Total**
Scotland	7.37	6.99	7.76	6.88	7.48	4.92	7.40	8.22	7.54	7.13	7.18
Average	7.52	6.40	7.81	6.86	7.15	5.20	7.46	8.36	7.43	6.74	7.13
Difference	**-0.15**	**0.59**	**-0.05**	**0.02**	**0.33**	**-0.28**	**-0.06**	**-0.14**	**0.11**	**0.39**	**0.05**

Sports											
	Dubai	Germany	Qatar	France	Canada	Japan	US	India	China	Ireland	**Total**
Scotland	6.54	5.60	7.28	5.96	5.70	5.30	5.17	8.19	7.57	6.37	6.37
Average	6.85	5.21	7.46	5.85	5.52	5.24	5.36	8.21	7.35	5.40	6.27
Difference	**-0.31**	**0.39**	**-0.18**	**0.11**	**0.18**	**0.06**	**-0.19**	**-0.02**	**0.22**	**0.97**	**0.10**

6. RECOMMENDATIONS FOR SCOTLAND'S SOFT POWER AND CONCLUSION

Scotland's overall ranking at second in the regional soft power index is certainly encouraging and speaks to the well-balanced set of soft power assets at Scotland's disposal. However, when we disaggregate the data and look at the objective and international polling data in isolation, we see more of a mixed performance for Scotland. The objective data clearly reports Scotland's strengths, but the polling data conversely shows there is a perceptions gap in global public opinion. Addressing this perceptions gap should be a priority for any future strategy to develop and leverage Scottish soft power.

The recommendations that follow are structured into two categories. The first focuses on Scotland's soft power resources and what can be done to further develop objectively assessed assets. The second category focuses on the intersection of soft power and strategic communications, offering a set of recommendations to address the current perceptions gap.

It must, of course, be recognised that the lion's share of Scotland's soft power resources exist outside of the direct control of government. This limits the action any government can take in developing soft power assets. Bearing this in mind, we still see a set of steps that could be taken to strengthen Scottish soft power.

Further developing Scotland's soft power assets

As illustrated above, Scotland's objectively assessed soft power assets are in a good place, relative to the nine other devolved regions included in the study. However, there is still room for improvement. Scotland's lowest rankings in the objective data sub-indices are in Engagement and Government. The good news about a weaker relative performance in these two categories of soft power is that Scotland does have more control in addressing them, relative to the others. It should be said that there is also likely a link between Scotland's lowest ranking category of objective data being Engagement and the perceptions gap we see in a lower overall performance in the polling data.

The components that go into the Engagement sub-index reflect both the international reach a devolved government has through things like international missions abroad, as well as its demonstrated positive leadership on global issues. The greater that network, the greater a government's ability to engage directly with international audiences and potential partners overseas. Scotland starts from a relative position of strength, so expansion would be further investment into what is already an asset in good standing. Only Catalonia and Flanders have more trade and investment promotion offices abroad at 41 and 70 respectively – while SDI has 35 offices. However, Scotland does benefit from four further Scottish government representative offices in Beijing, Brussels, Ottawa, and Washington, DC. In addition to these offices, Scottish government Innovation and Investment Hubs have opened in five cities: London, Dublin, Berlin, Paris and Brussels. These hubs pursue locally relevant opportunities and also offer opportunities to engage on a wider set of topics like culture, creativity, and diplomatic government-to-government relations.

As these hubs are relatively new, it will be important to monitor their efforts, progress, and achievements carefully. Their ability to engage on issues beyond purely trade and investment will be a real positive in better communicating all Scotland has to offer. Continuing to strengthen the international network should be a high priority in further developing Scotland's soft power assets.

As such, our first recommendation is that the Scottish Government conduct a review of its existing overseas representative offices and look where it could invest in new offices. This should be mapped against Scotland's priority international partners and markets. We would also argue that the review should start from the premise that Scotland should look to increase its overseas presence.

Our second recommendation is that Scotland engage in paradiplomacy with a set of priority countries and encourage them to open consulates general in Edinburgh. If Scotland hosted more consulates general, it would make government-to-government collaboration easier and more likely. Edinburgh currently hosts 18 functioning consulates and consulates general. This puts Scotland joint second in the index on that metric with Flanders, but well behind Catalonia, which hosts 58 functioning consulates and consulates general. Looking at the Scottish Government's priority countries, given Scotland's commitment to the Nordic – Baltic Policy Statement and the Nordic Horizons Group, the government could consider opening discussions with the Nordic countries to explore the feasibility of a Nordic consulate, much like the shared Nordic Embassy compound in Berlin. Given the level of Scotland's devolved authority it could put the case forward to priority countries that a consulate general in Edinburgh would be good for bilateral relations.

Our third recommendation is that Scotland could consider encouraging its city administrations to grow their own international networks through cross-border partnerships, organisations, and sister city agreements with cities in other countries. Scotland does already have 19 sister city partnerships, but this is fewer than the totals for Quebec, Catalonia, and Flanders. Doing so would increase the opportunities for people-to-people contact between Scotland and communities abroad. This should focus on priority markets, but will also be extremely important for strengthening links with European cities following Brexit.

Our fourth and final recommendation pertaining to the Engagement component of Scotland's soft power is a call to show greater international leadership on issues of environmentalism and renewable energy. Scotland performs well on the environmental metrics in the Engagement category of the index. However, it is not a member of the Regional Governments for Sustainable Development Network, which is an important forum for promoting sound environmental policies and regulations for devolved governments. Scotland is well regarded for its work on renewable energy sources like wind and tidal power. The government's aim to generate 50 per cent of Scotland's overall energy consumption from renewable sources by 2030 makes it a credible world leader in the sector. Moreover, Scotland set a world first in October 2018, becoming the first country to connect tidal power generation directly into the power grid. Scotland's combination of political commitment to sustainability and world-beating innovation in renewable energy gives it an extremely compelling story to tell and an opportunity to promote Scotland's credentials in this space, and show leadership in driving the discussion on best practice. It follows that greater international leadership and engagement from the Scottish Government on sustainability and renewable energy is not only a good thing to do, but will have a positive effect on Scotland's soft power reserves.

Addressing the perceptions gap

Given Scotland's strong performance across the objective data, its ranking on the international polling points to an unfortunate perceptions gap among international audiences that needs to be addressed. Focusing on strengthening Scotland's 'Engagement' assets will help, but clearly the approach to communicating directly with international audiences has not been as effective as Scotland's objectively assessed soft power assets would suggest – at least as of March 2018, when the polling for this study was conducted. However, the new Scotland is Now campaign presents an opportunity to radically shift perceptions of Scotland in markets where the campaign is deployed.

Scotland is Now is at a relatively early stage and as mentioned, the polling commissioned for this study was run before the launch of the campaign. Thus, we should treat the subjective data of the index as a benchmark going forward. It cannot be used as a means to assess the campaign. While it is too early to fully evaluate Scotland is Now at this stage, the government should still be testing and assessing the current messages, content, and campaign placement to date.

Our sixth recommendation is that useful learning on how such campaigns can be optimised may be gained from looking at other examples, including the UK's GREAT campaign.

Our seventh recommendation is that the cornerstone of this campaign should be education. Scotland enjoys a significant advantage over the other devolved regions on the Education sub-index, standing head-and-shoulders above the rest. With its long tradition of world-changing intellectual leadership and scientific innovation, it would be sensible to put education and innovation at the heart of a new global narrative for Scotland. Scotland is already home to over 50,000 international students and ten universities ranked in the QS Global Top 200. Even assessed against much larger countries that is a worthy achievement. On a *per capita* basis it is virtually unrivalled. Using education and innovation will not only resonate with potential international students, but also R&D-driven companies, entrepreneurs, investors, and top global talent. It plays well with Scotland's strengths in the Enterprise sub-index as well.

Our eighth recommendation stems from Scotland's relatively low ranking in the polling for 'political values', as well as the fact that Brexit is underway. Ranking sixth in the polling on 'political values' is somewhat unexpected, given Scotland's third place finish in the Government sub-index. Again, this hints at a communications gap with international audiences. Scotland's political values can play a part in the overall mix in promoting Scotland abroad. Scotland's political values can be said to be outward-looking, welcoming, tolerant and responsible. Scotland's voters also voted by a clear majority to remain in the European Union in the 2016 referendum. These features can be reflected in how Scotland communicates its values in a post-Brexit context. Scotland is Now, which emphasises key values such as inclusivity, will be well received in many markets. In addition to the campaign, a greater use of ministerial visits to priority markets and use of international media opportunities would help communicate political values. International visits and traditional media campaigns could be closely co-ordinated for maximum impact in priority countries.

Our ninth recommendation focuses on Scotland's especially low ranking on cuisine, luxury goods, and welcoming to tourists in the polling. Tourism should, obviously, play a significant role in any comprehensive nation branding campaign for Scotland. While we found that Scotland performs better on Culture and Sport – both key drivers of tourism – there is clearly a job to do in changing perceptions on Scottish food, drink, and hospitality. With (hopefully) more government-backed international platforms for engagement and a single brand under which to co-ordinate communications, outreach, and events, Scotland should look to develop partnerships across the strongest of the country's luxury brands, showcasing Scottish craftsmanship and leaders in the food and hospitality industry. Likewise, partnerships with Scotland's whisky producers could do more to change perceptions on cuisine, tourism, and Scottish luxury goods producers.

The UK's GREAT campaign had done an excellent job in providing international platforms to showcase the best of British culture, cuisine, innovation, design, film, and even creativity. Working with partners in the private sector, the government can provide a platform, but leave it to partner organisations themselves to make the most of that platform. Scotland is Now should look to examples like the GREAT Festival of Creativity that ran in 2015 in Shanghai. This major event provided a platform under GREAT branding for Britain's creative industries and was an ideal vehicle for partnership with the private sector. It made an initial investment from the UK government go much further with private sector contributions. But even on a smaller scale, SDI's global offices could consider planning and executing smaller one-off events with private sector partners, which would be geared appropriately to the local markets.

As reported in the objective data, Scotland's culture-based soft power assets are a clear strength – though this does not come through as strongly on the international polling data. This speaks to an opportunity to better leverage Scotland's cultural assets abroad, which brings us to the tenth recommendation: make greater use of these assets by concentrating all international cultural promotion efforts on priority countries. To do this, the External Affairs Directorate might consider producing a cultural promotion strategy and plan for each priority country. The current international engagement frameworks for several priority countries show there is broad variation in how culturally focused engagement is executed. With respect to China, for example, Scotland has done a great deal to promote Scottish culture in China, affording Chinese people the chance to engage directly with Scottish culture through a range of activities and programmes. But in India, this has not been the case, or at least not to the same extent. The polling data seems to support the argument that more cultural promotion activity in a country can have a positive impact. Chinese survey respondents scored Scotland above average for 'Culture', whereas Indian respondents scored Scottish 'Culture' below the average for all ten devolved regions. There should be a minimum standard of cultural promotion activity in priority countries.

Our final recommendation is to reinforce Scotland is Now with a comprehensive traditional and digital media engagement campaign in priority markets. The media engagement campaign should be built around the key messages of Scotland is Now, with themed op-eds in international media outlets, carefully localised messages for priority markets, and social media campaigns with curated content. Generating earned media coverage, leveraging more ministerial visits for media engagement, and carefully positioned articles would help reach audiences that simply might never come across Scotland is Now material. A strategic media engagement campaign would also give an added and helpful political dimension to the more promotion-driven content of Scotland is Now.

CONCLUSION

The overarching lessons for Scotland coming out of the first soft power index for devolved regional authorities are broadly positive. Relative to the other nine regions assessed, Scottish soft power is in a competitive position and is exceptionally well-balanced across the different asset categories. The real concerns for Scotland are arguably twofold. First, there is the gap between the strong performance of Scotland's objectively assessed soft power assets and the international polling data, which suggests a problem of cut-through with international audiences. Second, the uncertainty surrounding Brexit and the challenges of engaging with international partners in the wake of Brexit will require Scotland to have a clearly articulated narrative on its place in the world and why it should be a partner of choice going forward.

The above recommendations are all geared towards meeting those two challenges. An enlarged and improved international network will be valuable as Scotland looks to strengthen existing international links and build new ones.

One final point for further consideration as Scotland is Now and other platforms are leveraged to project a refreshed Scottish brand to the world is the different emphases between positioning for heritage and positioning for the future. Is Scotland all tartans, castles, and bagpipes? Or is it a dynamic, modern Northern European country? Those charged with running the Scotland is Now campaign will need to continually consider how to balance this inherent conflict of positions, and think about in which countries it will be more effective to leverage heritage or modernity. But this is not just a challenge, it is also an opportunity. While brands and assets like Johnnie Walker Blue Label whisky, smoked salmon, historic castles and scenery project heritage, others like BrewDog, Skyscanner, Rockstar North, and Nova Innovation project Scotland's dynamic future. Likewise, there are those that bridge the two like the new V&A Museum in Dundee, the late Andrew Fairlie's two-Michelin star restaurant at Gleneagles, and modern outdoor sports like mountain biking. How Scotland is Now can achieve the appropriate balance of heritage and future will definitely be a critical factor in delivering on its ambitious objectives.

Regardless of how the Scottish Government – and other non-government actors involved in engaging global audiences – balance this dichotomy, it is important to remember that Scotland starts from a position of strength. The remainder of 2020 and the immediate years that follow will be exceedingly challenging with Brexit and ongoing international geopolitical and economic uncertainty. However, as the Regional Soft Power Barometer makes clear, Scotland enjoys a well-balanced set of soft power resources, compared to the nine other devolved government regions included in the study. The challenge will be ensuring those resources cut through with global public opinion. Hopefully Scotland is Now and other efforts will deliver exactly that.

APPENDIX: REGIONAL SOFT POWER INDEX METRICS AND DATA SOURCES

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

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

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22. Data is gathered from the OECD's PISA database, with the most recent data reporting results from 2018. More can be found on the OECD PISA website: http://www.oecd.org/pisa/data/

23. According to metric data sources UNDP (http://hdr.undp.org/en/content/gender-inequality-index-gii and Reporters Without Borders (https://rsf.org/en/ranking)

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