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**Soft power and
internationalisation: the role of
higher education promotion
agencies**

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1. Introduction

To what extent does education represent a relevant component of a country's soft power arsenal? How does international education tie with international politics, and how significant are state-controlled agencies in the international promotion of a country's cultural blueprints? This work aims to highlight the solid, albeit seldom perceived as significant, links between soft power and international education, not least as a source of wealth for the countries promoting, advertising and marketing the internationalisation of their higher education system.

In ancient times, wealthy families used to send their scions abroad to complete their upbringing: the Macedonian Prince Alexander was educated by the Greek Aristoteles, the Roman politician and philosopher Cicero perfected his rhetoric in Athens and in Rhodes. Later, students and professors have been by definition internationally mobile since the birth of modern universities in the 9th century. But internationalisation as a mass phenomenon, involving millions of students and professors, is a comparatively recent occurrence, which started after the Second World War and gained particular momentum in the years 90's of the 20th century. Coincidentally, in that period the American Scholar Joseph S. Nye, Jr., coined the term 'soft power', so to define a state perceived cultural and diplomatic strength not directly related to the military, also making direct reference to the role of the university as a catalyst of international students.

This work investigates on the ties between soft power and internationalisation, with the purpose to understand if there exist or not an awareness of the (positive) implications, for a country's soft power, of assertive exploitation of the higher education internationalisation trends. Attention will be thus given to state agencies in charge of internationalisation, to their internal organisation, the way they are funded, how the upper officials are nominated.

To correctly address the task, the research will start from defining what soft power is: the second chapter is titled “Soft Power from Nye to Nye”, and is meant to provide an overview of Nye’s theoretical categorisations, as well as an account for soft power’s main components: culture, political values and foreign policy.

The third chapter looks more in detail into such components and introduces the relevance of branding as the art of reforming a country’s image and shaping its identity in a way that makes the nation stand out in the world. Also, the section will provide explanations of main soft power assets, among which higher education, together with an overview of the leading university rankings. Last, the chapter will focus on the ‘Softpower30’ index, which encompasses all relevant elements (soft power, rankings, and a country’s perception in the world).

The fourth chapter will serve as a bridge between the account of soft power and branding on the one side, and the core of the research, which focuses on higher education, on the other. With the description of four country cases (the U.S., France, China, and Italy) and one international organisation (the U.E.), reporting evidence upon convergences between national interest, foreign policy, cultural policy, branding activities, and higher education international aims. The breakdown of single components of state soft power activity helps to comprehend the alleged interaction between the soft power performance, and branding and internationalisation policies outcomes.

Starting from classic Jane Knight’s definition, and reporting Hans De Wit’s categorisation of the rationale behind the phenomenon, the fifth chapter illustrates internationalisation of higher education, from theory to practice, as the result of a complex stratification of different-layer policies of the state and the institutions. Since higher education become a global commodity, the link between the marketed good and the perceived image of the seller also will be illustrated, accounting of the evolution of internationalisation theories practices (e.g.,

student exchange vs student attraction), that lead to what today is referred to as 'comprehensive internationalisation'.

Further, the chapter will provide a framework upon which contextualise soft power and internationalisation of higher education, i.e. the true *raison d'être* behind a state's wish to attract foreign students. They will gradually become acquainted with the achievements of science and culture of the host country and consequently, after coming back with an assimilated understanding of the host state and personal relations, as Joseph Nye states, they are expected to become effective transmitters of the language and culture of the country where they have studied.

Chapter 6 opens with the question whether states aware that tertiary education is a soft power component, finding that most of the times there is no direct evidence of such awareness: not always do agencies cover both the role of promoters of the higher education industry: most of the times they function as vehicles of a plethora of other state services, and anyhow institutions, rector's associations, service providers, and other public and private stakeholders. So to what extent are state patronising internationalisation? The chapter proposes a categorisation based upon selected parameters, first being the alleged degree of dependence from the state.

The research will not account for the output delivered by agencies, but how they organised, funded, directed, amongst other geopolitical parameters –though singular programs delivered will be accounted for if relevant to the research. Given the investigation framework, a special focus will be put on observing whether the agencies perform a role as think tanks. The scheme, that will further be detailed in chapters #7 and #8, will consider four different typologies (National governmental agencies, sub agencies, Quasi-governmental organisations – QGOs, Independent national organisations).

Chapter #7 will then account for national governmental agencies and sub-agencies that maintain close ties to their respective government. The cases of the U.S., South Korea, the Russian Federation, Australia, Sweden, France, Estonia, China, Spain, Finland will be outlined.

Last, chapter #8 explores the two latter forms of agencies envisaged, QGOs and Independent National Organisations, with focus on India, the Netherlands, Chile, Taiwan, the U.K., Turkey, Japan, Italy, Austria, and Germany.

The last introductory remark concerns the time of composing this work, which is the first quarter of 2020, i.e. the time of the spread of the coronavirus. Amongst other implications, this pandemic has brought a stop to substantially all higher education internationalisation activities, to the point that much of the material reported here may even sound obsolete at the time of reading.

Though the scope of the present work is to account for the interrelations between a form of state power (soft power) and one branch for globalisation (the internationalisation of higher education), it is, however, clear that coronavirus will be a game-changer whose implications will fully emerge only with time.

2. Soft Power from Nye to Nye

Since the ancient times, both scholars and political leaders consider power as a tangible resource that can be used to coerce others: the idea of power has been central to politics as far back as the Greek historian Thucydides, while our understanding of it has been influenced by the work of the Italian thinker Nicolò Machiavelli and the English philosopher Thomas Hobbes. To more recent years, and from a theoretical perspective, the work of Robert Dahl, whose definition of power can be summarised as ‘the ability of A to get B to do something that A wants and B would not otherwise do’, is a good starting point. (Dahl: 1957). From a realist perspective, this ability to affect behavioral outcomes lies in a state's economic and military strength. Great states in international relations are determined by their “relative military capability, for a state to qualify as a great power, a state must have sufficient military assets to put a serious fight in an all-out continental war against the most powerful state on earth” (Mearsheimer, 2006).

2.1 Nye's soft power

The post-cold war era witnessed the origin of a concept called “Soft Power”. Joseph Nye, an American political scientist, coined the term soft power in his book “Bound to lead: The Changing Nature of American Power” (Nye: 1991). Since then the concept has evolved, also in association with the evolution of the global geopolitical scenario, though the definition that “soft power is the art of obtaining desired results by persuasion and attraction rather than coercion or payment” (Nye: 2008) remained somehow constant. Historically, the concept of soft power has succeeded in capturing the attention of leading decision-makers: with the changing global system, the leaders have realized the importance of soft power in enhancing influence over international outcomes (Wilson: 2008).

This section focuses on the definitions provided by Nye and the debate within academia that followed their publication, with a special focus on the connections between such works and the prominence and importance of soft power in higher education.

Hence, the title of this chapter is “Soft Power from Nye to Nye”, as it is intended to provide an overview of Nye’s theoretical categorisations, as well as an excursus from his 2004 seminal book “Soft Power. The means to succeed in world politics” (Nye: 2004), through his 2011 work “The future of power” (Nye, 2011), where he develops the concept of “smart power”.

Soft power is the ability to change the point of view of anyone through attraction and desirability and through a combination of confident cultural appeal, progressive political values, and assertive foreign policy. Soft power can be consciously structured and used to change or influence the public opinion, both domestically and internationally, on a variety of topics, either directly through lobbying politicians, petitioning through NGOs, or even leveraging economic influence. Nye’s claim that “the best propaganda is not propaganda” further explaining that during present times “credibility is the scarcest resource” (Nye: 2012). The American scholar often refers to “the second face of power” as countries may seek to enhance their standing in world politics fostering and stimulating other countries’ imitation process: either admiring its values, or emulating its example, or aspiring to its level of prosperity and openness (Nye: 2004). The gained influence can then act as a guide for the culture, ideology, and the social system of other nations, stimulating cultural recognition and guidance others may want to follow, if not utter imitation. In Nye’s view, therefore, this soft power capability springs both from attractiveness a country showcases, and the set of values it demonstrates.

In time, Nye further develops and refines the concept of soft power: according to him, countries may play strategic and political moves around the idea of “smart power”, which he portrays as a combination of hard and soft power (Nye: 2011). Accounting for the U.S.’s role

in the World, research after Nye's shows how the American conscious activities show that there exist cultural, political and economic means to attract other nations to its ideology, to its culture and lifestyle (Zhang: 2008).

2.2 Soft power's main components

As for the core resources of soft power, Nye believes that political values represent the key element, culture is the support, and foreign policy is the method. These elements are closely connected and intermingled.

- Culture

Even before Nye's analyses, research has shown how culture represents the cornerstone of a country's soft power: "a country's soft power relies more on international culture's potential energy, which is the international culture and values trends" (Wang: 1993). Nye's narrative is more encompassing, accounting for multi-level ramifications culture may take, and showing how not only may culture be an expression of a country's intelligentsia, but popular (pop) culture plays a crucial role, too. "Culture is the set of values and practices that create meaning for society. It has many manifestations. It is common to distinguish between high cultures such as literature, art, and education, which appeals to the elites, and popular culture, which focuses on mass entertainment" (Nye: 2004).

- Political Values

Values are embedded within the resources where other soft powers rest on. A nation's principles and ethics, that are 'internal' values, inherent to a country, influence the international image of that country; as well as political values express a

country's political ideals and earns her further international recognition. Often, a strong ideological system implies also strong political values: "any country in the history needs to adapt their political needs and political ideology which serves its economic foundation and social system. Otherwise, the state system will lose its legal principle of rules that can subvert a nation's political system." (Liu: 2012).

- Foreign Policies

Foreign policies may be summarised as the extent to which a country participates in international affairs, the level of foreign aid, the investment on security represent a standard to measure the soft power in its foreign policy. The diplomatic effort a country is capable to convey can be directly measured in terms of the level of diplomatic posts abroad, or investment in foreign aid, or other quantifiable initiatives and operations. This effort is not valuable *per se*: besides instrumental operations, policies too ought also to be perceived positively as 'bad' foreign policies can undermine soft power if they are "hypocritical or arrogant" (Nye, 2004). Public diplomacy can, therefore, be explained as "direct communication with foreign peoples, to affect their thinking, and ultimately, that of their governments" (Nisbet et al.: 2004).

Today, modern technology made it much easier to reach foreign publics, thanks to recent developments in communication: the Internet was one of the most crucial developments in IT and its role has mounted, as it has become a centre of information itself, affecting public diplomacy strategies through providing anyone with opportunities to exchange ideas about world affairs (Gilboa, 2008).

Nye lists three dimensions of public diplomacy (Nye: 2004), that are:

- ✓ Daily communications, for example, the press;
- ✓ Strategic communication, planning symbolic events to brand central themes;

- ✓ Development of “lasting relationship with key individuals over many years through scholarships, exchanges, training, seminars, conferences, and access to media channels.

2.3 Critical approaches to Nye's work

Nye's perception of what is universally attractive and what is generating soft power leads to problematic issues regarding the definition the U.S. scholar has utilised. Soft power as applied in North America, Europe and Asia, has been adapted to suit the belief that certain 'national values' are inherently attractive. Rather than oppose the idea of soft power *per se*, policymakers have often (deliberately) traded off their own culture, political values, or foreign policy with others perceived as more attractive.

Other critics to Nye's work underline its inability to measure (Yukaruç: 2017). As much of soft power is based upon the perceived image of one country by others, it is problematic to prove that one country changes its behaviours and actions according to other country's image, though plenty evidence of such transformation are evident worldwide.

Last, though there are today rankings claiming to measure a country's output of soft power (see chapter # 3), the level of accuracy of those rankings is by definition questionable, as they measure non weighable commodities. As soft power's currency relies on intangible resources, particularly cultural and political values, it is far more difficult to evaluate its effects than it is with hard power (Li: 2017).

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3. Soft Power: an overview

As seen in the previous chapter, Joseph Nye's soft power approach lays on three foundations: the culture, the political values and the foreign policy developments. While the American scholar labelled power into military power, economic power and soft power itself, narrow internal strategies, policies and foreign agenda have the power to undermine the soft power of any country (Gallarotti: 2001). Through the exponential diffusion of new communication media and instruments, which allowed further engagement to international debate to segments of stakeholders excluded beforehand, soft power has become a major influential tool in contemporary world politics. Where the dictatorial countries use force, the democratic countries use attractiveness: the allure and charm a country possess and hence is capable to emanate is per se a basic constituent of soft power.

What are then the basic components of soft power? What image would an external observer perceive by every component's role?

3.1 Public diplomacy

Public diplomacy is of soft power's key instruments, providing the platform to develop soft power policies. Edmund A. Gullion coined the term in 1965: "public diplomacy deals with the influence of public attitudes on the formation and execution of foreign policies" (USC Center for Diplomacy: 2006).

With the development of new means of communication, increasingly more actors become part of diplomacy. Scholars today prefer to use the definition 'new public diplomacy', that former United States secretary of state Condoleezza Rice termed as 'transformational diplomacy' in 2006 (Melissen: 2005). In an interconnected world, public diplomacy has become a tool to manage the global environment. To achieve objectives and foreign policy

goals, states have to engage more actors and are compelled to know how to employ public diplomacy tools.

The goals of public diplomacy are:

- To present the country as a responsible and trustworthy member of the international community;
- To promote a positive image of a country;
- To engage and influence foreign people;
- To strengthen the country's influence in shaping the international political and security environment;
- To successfully respond to any kind of propaganda;
- To use soft power for trade, investment and economic prosperity.

In terms of soft power, it is thus significant to account for the state investment in their diplomatic sites, being them embassies, consulates, or other kinds of representations. Here, the Global Diplomatic Index (Lowry: 2019) helps to take the most accurate snapshot available.

rank	country	Population (million)	GDP (B, USD)	Total Posts	Embassies	Consulates	Permanent missions	Other
1	China	1.400	14.026	276	169	96	8	3
2	USA	327	20.494	273	168	88	9	2
3	France	67	2.778	267	161	89	15	2
4	Japan	126	4.971	247	151	65	10	21
5	Russian F.	144	1.658	242	144	85	11	2
6	Turkey	82	767	235	140	81	12	2
7	Germany	83	3.997	224	150	61	11	2
8	Brazil	209	1.869	222	138	70	12	2
9	Spain	47	1.426	215	115	89	10	1
10	Italy	60	2.074	209	124	77	8	0

Remarkably, it is China who tops this special chart, a clear sign of constant investment in public diplomacy by the Asian giant. It is also noteworthy to underline that 4 out of the top 10 countries are European: to that number it is thinkable add Russia and Turkey, as to explain how the 'Eurasian continent' still bears so much diplomatic power internationally, investing strategic capitals for this effort.

Interpolation among the population, GDP, and a country's posts data provide further evidence of the effort some countries perform in comparison with others, as far and diplomatic investments are concerned. Among the 10 states reported above, Spain maintains a post every 0,22 million inhabitants, if compared to China's 5,07, i.e. a ratio of 1 to 20. As for GDP spending, Turkey maintains a post every 3,26 Billion produced: at the other end of the spectrum, the USA holds one every 75,07 Billion, i.e. a ratio of 1 to 19.

rank	country	Population (million)	GDP (B, USD)	Total Posts	Population / Posts	GDP / Posts
1	China	1.400	14.026	276	5,07	50,82
2	USA	327	20.494	273	1,20	75,07
3	France	67	2.778	267	0,25	10,40
4	Japan	126	4.971	247	0,51	20,13
5	Russian F.	144	1.658	242	0,60	6,85
6	Turkey	82	767	235	0,35	3,26
7	Germany	83	3.997	224	0,37	17,84
8	Brazil	209	1.869	222	0,94	8,42
9	Spain	47	1.426	215	0,22	6,63
10	Italy	60	2.074	209	0,29	9,92

As seen in chapter # 2, if aligned with common "universal" beliefs, foreign and domestic policies support a country in securing its positive image abroad. Conversely, policies that are regarded as two-faced, arrogant, unconcerned and based on a conservative approach to the national interest, can undermine soft power. According to Nye, a strong foreign policy should focus on promoting public and cultural diplomacy, contribute to international

cooperation and advocate human and minority rights (Nye: 2010). A policy can contribute to a state's soft power if it is perceived as moral and legitimate. For instance, in the Cold War period, the U.S. and its allies' policies based on values such as democracy and free markets contribute to their soft power. However, later on, the decision the Vietnam war and the invasion of Iraq bruised America's soft power. Thus a state's actions can attract or repulse others. If a state's foreign policy harm other states, in reality, it does damage to itself. It can affect its global status, popularity and the ability to influence the international political and economic environment. Furthermore, participation in multilateral cooperation, the concession of foreign aid, the implementation of attractive immigration policies, become the standard to measure the soft power of foreign policies.

3.2 Country branding

Understanding the importance of creating a positive image abroad lays at the very centre of any countries' soft power endeavour. Nation branding can be defined as the way a state represents itself on the global stage, so to influence its foreign affairs, gain international consensus, and promote its soft power. Opposite, a state's image has to do with the perception foreign observer have of a state's image.

The concept of 'brand' is inherently borderline to public diplomacy, as well as it is much closer to the concept of soft power than one may imagine. In a sense, soft power is the ideal link between diplomacy and country branding. If public diplomacy directly involves primarily diplomats, nation branding includes the application of all nation's (positive) resources to improve its image abroad. Simon Anholt and Jeremy Hildreth stated in their book "Brand America, The making, unmaking and remaking of the greatest national image of all time" that 'the idea behind nation branding is to represent the country not only to other governments but also to foreign publics' (Anholt and Hildreth: 2010).

Nation branding highlights a country's identity and reflects its ambitions and goals. It is the art of reforming a country's image and shaping its identity in a way that makes the nation stand out in the world. While branding focuses on identity, public diplomacy concentrates on promoting and sustaining smooth international affairs. Furthermore, it can increase international political influence and currency stability, restore global standing, boost investor confidence and international partnerships. If seen as long term approaches rather than short term issues, both these concepts are likely to be more successful (Gunek: 2018).

Brand Finance annually publishes a rank of national brands. In 2019 (Brand Finance: 2019) the top 10 countries were:

Rank	Country	Nation Brand Value	Change vs 2018
1	United States	\$27.8T	+7.2%
2	China	\$19.5T	+40.5%
3	Germany	\$4.9T	-5.7%
4	Japan	\$4.5T	+26.0%
5	United Kingdom	\$3.9T	+2.7%
6	France	\$3.1T	-4.0%
7	India	\$2.6T	+18.7%
8	Canada	\$2.2T	-1.8%
9	South Korea	\$2.1T	+6.7%
10	Italy	\$2.1T	-4.7%

Brand Finance uses three KPIs to calculate a Brand Strength Index (BSI) score:

- a. Goods & Services, covering factors such as openness to tourism, market size, and trade rules;
- b. Society, covering elements such as quality of life, corruption, and cultural image;
- c. Investment, covering items such as talent retention, use of technology, R&D, taxation, and the framework of national regulation.

3.3 Assets

Culture, economic success, media and art are those assets of a state which if used appropriately can help a state productively climbing the soft power ladder. For example, in China has used its economic success as its leading asset in promoting its soft image around the world (Kurlantzick: 2007; Chen: 2016). Policymakers are keen on making smart use of the promotion of national culture outside the state borders to foster key domestic industries, such as the tourism, the movie industry, or the publishing sector, exactly as a way they foster the perception of the image of their country abroad. Artists, musicians, writers, and filmmakers have the power to promote their nation's positive image: the Americans has long understood the promotion of soft power through its music and film industry.

As it is evident by the reported table, the U.S. manages to promote its film industry releasing each year more than 18 thousand new products, grossing nearly \$ 600 billion (TheNumbers: 2020). The American movie industry alone accounts for nearly the double as much of movies produced by the remainder top 10 countries combined. Interestingly, though, all countries listed in this chart, except for India, appear on the other the tables accounted for in this chapter, a sign that there exists a *fil rouge* between film production, the promotion of a country's image in the World, and soft power.

	Production Countries	No. of Movies	Average Production Budget (US \$)	Total Worldwide Box Office (US \$ billion)
1	United States	18.231	37,129,671	577.6
2	United Kingdom	3.058	30,326,899	50.3
3	France	2.697	23,500,965	19.5
4	China	1.667	31,287,347	29.9
5	India	1.598	14,424,796	7.3
6	Canada	1.308	19,332,825	7.0

7	Germany	1.137	30,393,543	9.4
8	Japan	1.132	29,601,538	12.6
9	Italy	1.101	16,938,793	4.1
10	Spain	982	24,701,437	3.9

Tourism, too, typifies an interesting case study, both thanks of the relevant inflow of foreign currency to world touristic hub spots, and because of tourists themselves: it's easier to consider as 'friend' a country visited as a tourist.

According to WorldAtlas (WorldAtlas: 2019), France topped the chart for touristic presences in 2019 and comes second ad far as international tourism receipts are concerned (Indexmundi: 2017). In terms of visitors, the U.S. comes second, but it's first for overall revenues, with an astonishing \$ 251.5 billion spent there by tourists in 2017.

Rank	Country	Million visitors (2019)	International tourism receipts (\$ billion, 2017)	Rank
1	France	89	69.9	2
2	Spain	83	68.4	3
3	United States	80	251.5	1
4	China	63	32.6	12
5	Italy	62	44.5	7
6	Turkey	46	31.9	13
7	Mexico	41	22.4	15
8	Germany	39	56.1	5
9	Thailand	38	62.1	4
10	United Kingdom	36	51.5	6

3.4 Government

There are certain conditions under which governmental soft power efforts are most likely to succeed. To effectively *pursuit* soft power, states need to identify an intended target, then influence that target to change its attitude, and finally ensure that the target's attitude affects

international political outcomes to a way which is desirable to the influencer. For instance, the absence of these conditions led to United States failure in Iraq, to the same extent that their existence helped to promote democracy in post-communist Europe.

It may be challenging to single out every single component of a government's action and image abroad; nonetheless, it is certain that the amount of foreign aid a country delivers constitutes an accurate proxy of that country's perceived image. The top 10 countries contributing more to foreign development aid are reported in the following chart (Wikipedia: 2020).

Rank	Donor	Total development aid B USD	Aid per capita USD	% of GNI
1	China	38	27.86	0.36
2	United States	31.1	95.52	0.15
3	United Kingdom	18.7	284.85	0.67
4	Germany	17.8	214.73	0.49
5	European Union	13.8		
6	Japan	10.4	73.58	0.21
7	France	9.2	137.35	0.36
8	Sweden	7	701.10	1.36
9	Netherlands	5.8	338.38	0.76
10	UAE	4.4	467	0.63

To what extent is China's development aid effort impacts on its global soft power? And how directly is Sweden's outstanding #8 globally, coupled with portentous 1,36 of GNI (the World's highest) linked with Stockholm's performance in the SoftPower30 (see paragraph 3.5)?

3.5 Culture

It is fascinating to understand the effects of culture when it crosses the border: culture represents the values and practices of any society, and as such epitomises the core element of soft power.

Culture can be distinguished into three levels: universal cultures, popular cultures and other cultures (Nye: 2004). If a country's culture includes universal values and promotes interests that are shared by others, the possibility of obtaining desired results will raise due to attraction and trust. Popular ('pop') culture such as the art, the music, and the cinema has the power to influence a nation's lifestyle. Its constant penetration in another country's pattern can promote the first's image like few other tools. The nation state can reshape another's psychology, if the 'importing' country accepts the exported culture.

Though there may be countless practical examples of how culture can influence the perception of a given country, this research chose to report the list of the top 10 most visited museums in the world (Wikipedia: 2020). The chart highlights the great investment by the U.S. and the U.K. in their top museums, as did France and China with the Louvre and the National Museum of China.

Rank	Name	City	Country	Visitors per year
1	Louvre	Paris	France	10,200,000
2	National Museum of China	Beijing	China	8,610,092
3	Metropolitan Museum of Art	New York City	US	6,953,927
4	Vatican Museums	Vatican City	Vatican	6,756,186
5	National Air and Space Museum	Washington, D.C.	US	6,200,000
6	Tate Modern	London	UK	5,868,562
7	British Museum	London	UK	5,829,000
8	National Gallery	London	UK	5,735,831
9	Natural History Museum	London	UK	5,226,000
10	American Museum of Natural History	New York City	US	5,000,000

3.6 Political values

A nation's political model is reflected in its political ideology and values, which are internationally recognised. Joseph Nye pointed out in "Think again: soft power" (Nye: 2006) that observing and respecting the same political values at both international and domestic

level is an important source of soft power. A country's credibility is enriched, her diplomatic goals achieved, if she makes actions follow the values she promotes. For instance, advocating democracy and defencing fundamental human rights values help gain other countries' esteem. As such, Western countries attract third world countries attention through promoting democratic practices. Likewise, Nye stated that establishing rules which can dominate the international political arena is an essential source of soft power (Nye: 1994). Continuous innovation can be a source to dominate international affairs. Currently, America is leading the world stage due to its constant innovation in every arena, from technology to entertainment, from aerospace to sport (Lin and Leng: 2017).

3.7 Digital

The digital revolution has made the world more aware of the events happening globally. The technological innovation has created new communication channels and an extraordinary level of connectivity in multiple ways. It has changed the direction of soft power message propagation from its traditional sources shaped by careful government actions to the digital world where soft power exchange is determined by non-traditional channels, constantly evolving and shaped by individuals, not governments. The potential of these digital tools is undeniable and they are becoming more common and adopted by more and more state and non-state actors, thereby increasing the significance of the digital component of soft power. The use of digital technologies in diplomacy has tremendously increased in the last 10 years. For instance, ambassadors are using Skype to interact with university students, the Georgian education ministry is offering online courses in the Georgian language, United Nations ambassadors are using WhatsApp to coordinate their voting on several resolutions, and Foreign Affairs ministries are using software programmers to manipulate social media processes. The potential of the digital world is unlimited in projecting the soft image of a country. However, without a strategy of how digital instruments should be used to enhance

the soft power of a nation state, they could cause problems of coordination and implementation (Nye: 2010).

Though there are countless opportunities to measure a country's effort vis-à-vis the ongoing digital revolution, the present work chose to highlight the number of startups flourishing in a selected state (Startup ranking: 2019), for where a favourable environment is available for such newcos to develop, probably all other key development factors (lean bureaucracy, access to credit, high-speed connection, reliable logistics, and so forth) are as well relevant. Besides, often startups find advantage in grouping together in a given city or territory (Valuer: 2019), where endogenous factors facilitate their flourishing.

rank	Country	Startups		City	Country	rank
1	USA	47,931		Berlin	Germany	1
2	India	7,418		Tel Aviv	Israel	2
3	United Kingdom	5,185		Helsinki	Finland	3
4	Canada	2,637		Stockholm	Sweden	4
5	Indonesia	2,178		Bengalûru	India	5
6	Germany	2,059		London	UK	6
7	Australia	1,527		Boston	USA	7
8	France	1,452		Copenhagen	Denmark	8
9	Spain	1,275		Amsterdam	Netherlands	9
10	Brazil	1,108		San Francisco	USA	10

3.8 Education

Education is a well-established method of exercising soft power, capable to directly influence public opinion (Wojciuk: 2018). In this globalised world, the number of countries that consider education as the best way to promote their national interest on the world stage has increased. Both developed and developing countries are (consciously) using education as an instrument of soft power. A highly developed education system that integrates international education can attract foreign students, an element that in turn can stimulate intercultural relationships and contribute to the prosperity of host state economies. Students can be the effective spreaders of the language and culture of the host country wherever they

go in the world. Therefore, the effectiveness of education as an instrument of soft power increasingly relevant (Wojciuk and Michalek: 2015).

Tertiary education systems have always been main engines of prosperity for a country: a well-established educational system is directly interwoven with its level of prosperity, economic capabilities, and overall development. At the same time, the education system can be also seen as a very effective instrument of soft power (Nye: 2005): one of the main goals of the present work is to highlight the direct efforts some countries put in place to promote their tertiary education systems globally *also* to enhance their soft power.

At a minimum, via their research the best academic systems cultivate inventions and patents, fostering the growth of the global economy and the enrichment of the world's culture. Often, Nobel Prize winners are academics, their works being then quoted, reported, and considered internationally. Moreover, academics travel internationally as visiting professors, contributing to spreading the knowledge of their research, and hence the prestige of their *alma mater*. This comes with a heightened perception of the country where the university is based by fellow academic hosts. The other immediate aspect that needs to be considered is student exchange, and its most recent development, i.e. the attraction of international students. If the immediate outcome of such actions has to do with more international tolerance and boosted cultural exchanges, in the long run it bears more interesting fruits. A person that graduates abroad will always be a genuine ambassador of the host state, let alone a convinced promoter of bilateral (economic) co-operation. Some political figures that studied overseas later helped shaping their country's educational system upon their own experience.

It is, therefore, no wonder that nowadays a growing number of nations that are promoting their education system to support their national interests. Many countries –possibly the vast majority of the existing ones- offer a lot of opportunities for foreign students from all over the world to join higher education programs that serve their agenda.

A direct snapshot of how universities, and hence states, are ranked internationally is offered by the three best-known university rankings, i.e. Academic Ranking of World Universities (ARWU: 2020), QS-Quaquarelli-Symonds (QS: 2020), and Times Higher Education (THE: 2020). Though each of these lists a variable number of world universities, the present work takes into account the top 200 positions: the following table ranks states upon how many universities list in the top 200 of each of the three major international rankings.

Rank	Country	ARWU	QS	THE
1	U.S.	66	66	60
2	U.K.	21	28	28
3	Australia	17	9	11
4	Germany	10	12	23
5	Canada	9	7	7
6	France	9	5	5
7	Netherlands	9	9	11
8	China	8	7	7
9	South Korea	7	7	6
10	Japan	3	10	2
	Top 10 countries / world top 200	79,50%	80,00%	80,00%

Interestingly, most of the top 10 countries are present in the other charts reported for in this chapter. Moreover, the top 10 countries account nearly perfectly for the 80% of the top 200. The use, or the misuse, of branch campuses by higher education institutions represent another illuminating perspective about the phenomenon, “with both campuses influencing the environment, and the broader context frequently affecting operations of those institutions” (Wojciuk: 2018). Oddly enough, given the absolute need for skilled graduates, the absolute number of inhabitants, and the (relative) lack of quality HEIs, China tops the chart as a host country. The first 5 host countries are either the Far East or MENA states. Conversely, the U.S. tops the chart as branch campus providers (home country). Among the first 5 providers, it is interesting to underline the active role of Russia. As Anna Wojciuk

underlines, “IBCs [International Branch Campuses] are sometimes perceived as transplants of Western imperialism; while elsewhere, just as their declared objective state, they have the reputation of places where students can obtain a Western, quality education for less money and without the necessity to travel abroad” (Wojciuk: 2018).

rank	Host country	Branch campuses
1	China and Hong Kong	43
2	United Arab Emirates	34
3	Malaysia	13
4	Singapore	11
4	Qatar	11
5	Canada	9
6	U.K.	7
6	U.S.	7
7	France	6
7	South Korea	6

Home countries	Branch campuses	Rank
U.S.	91	1
U.K.	42	2
France	31	3
Russia	22	4
Australia	15	5
Netherlands	10	6
China and Hong Kong	9	7
India	9	8
Canada	6	9
Germany	4	10

3.9 The Soft Power 30: a Global Ranking of Soft Power

The Soft Power 30 is a global ranking of soft power, edited yearly by Portland, a strategic communication consultancy. The index “combines objective data and international polling to build what Professor Nye has described as ‘the clearest picture of global soft power to date’ (Portland: 2019).

Besides providing a detailed index, the Soft Power 30 reports trends, snapshots and essays of the diplomatic and political international situation. Among the trends accounted for in the 2019 edition, it is interesting to list the following three:

- The rise of populism and nationalism in Western democracies;
- The US abandoning its traditional multilateralism approach;
- The rise of new powers and the threatening of the existing world order.

With international affairs negatively influenced by this general confusion, nation states and, more generally, entities operating in the global arena have three options to choose from, and namely retrenchment (reduction of international commitments), consolidation (intended as building upon the gains some states have achieved in the last years), or expansive reinforcement (i.e., an active effort to push and ask for more democracy). Soft power plays an active role in all the above-mentioned approaches.

This accounted for, the relevance of this section, if seen in the perspective of the entire work, is twofold. On the one hand, the Soft Power 30 manages to effectively, albeit imprecisely, measure the level of the soft power of the 30 most relevant countries worldwide. This is achieved by making use of two broad sets of indicators: the objective data account for the 65% of the index, whereas the polling data for the remainder 35%. The second reason why this report is relevant is because of the centrality of universities in the world power game, and specifically of the importance of HEIs in attracting foreign students.

Objective data is measured via the lenses provided by 6 categories, each bearing a different weight within the objective data macro indicator.

N	Indicator	weight	Description
1	Culture	12,5%	The values a country promotes, the cultural output guarantees (e.g., books and movies), and the number of tourists attracted.
2	Enterprise	18,7%	Both competitiveness as well as the attraction of a country's economic model.
3	Engagement	20,6%	The level of foreign policy resources, several embassies and consulates, coupled with the ability of states to engage international audiences.
4	Digital	13,1%	The extent to which countries have embraced technology and how well they are connected in the digital world.
5	Government	20,8%	This is a set of core values including metrics on individual freedom and human rights.
6	Education	14,3%	The overall rankings of a country's academia, the research output, and the level of attraction of international students, amongst other factors.

Each of the above-mentioned indicators follows its own, ad-hoc chosen, metrics. For the present work, it is, therefore, necessary to specify which are the components of Indicator # 6: the education sub-index focuses primarily on higher education: the average of OECD PISA science, math, and reading scores [source: OECD]; the number of top global universities [source: Times Higher Education top 200]; the number of academic science journal articles published [source: World Bank]; the number of international students in the country [source: UNESCO]; spending on education as a percentage of GDP [source: World Bank] (Portland: 2019).

What follows is the chart of the first 20 countries listed in Soft Power 30, 2019 edition.

rank	Country	Score	rank	Country	Score
1	France	80.28	11	Italy	71,58
2	United Kingdom	79.47	12	Norway	71,07
3	Germany	78.62	13	Spain	71,05
4	Sweden	77.41	14	Denmark	68,86
5	United States	77.40	15	Finland	68,35
6	Switzerland	77.04	16	Austria	67,98
7	Canada	75.89	17	New Zealand	67,45
8	Japan	75.71	18	Belgium	67,17
9	Australia	73.16	19	South Korea	63,00
10	Netherlands	72.03	20	Ireland	62,91

Breaking down the data composing the Soft Power 30 Index, it is possible to generate 6 different charts, accounting for the top 10 countries in each, as follows.

Engagement		Culture	
rank	Country	rank	Country
1	France	1	U.S.
2	Germany	2	U.K.
3	U.K.	3	France
4	U.S.	4	Germany
5	Japan	5	Spain
6	Spain	6	Japan
7	Italy	7	Italy
8	Netherlands	8	China
9	Turkey	9	Netherlands
10	China	10	Belgium

Government		Education	
rank	Country	rank	Country
1	Switzerland	1	U.S.
2	Netherlands	2	U.K.
3	Norway	3	Germany
4	Sweden	4	Sweden
5	Germany	5	Denmark
6	Denmark	6	Belgium
7	Finland	7	Australia
8	Canada	8	France
9	Austria	9	Netherlands
10	New Zealand	10	Canada

Digital		Enterprise	
rank	Country	rank	Country
1	U.S.	1	Singapore
2	Canada	2	Sweden
3	U.K.	3	Switzerland
4	France	4	Denmark
5	South Korea	5	U.S.
6	Switzerland	6	Finland
7	Japan	7	Japan
8	Singapore	8	Germany
9	Sweden	9	South Korea
10	New Zealand	10	U.K.

Subjective data is gathered using specially commissioned polling across 25 countries: in each of these interviewed specialist and expert answer questions about the perceived (subjective) prestige of a given country *vis-à-vis* a set of criteria, reported in the following chart. Subjective data, too, are weighed.

N	Indicator	weight	Description
1	Global culture	5,2%	Perception of foreign countries contributions to global culture.
2	Luxury Goods	7,6%	Perception of luxury goods produced by foreign countries.
3	Technology Products	8,3%	Perception of technology products of foreign countries.
4	Cuisine	12,0%	Perception of the cuisine of foreign countries.

5	Livability	15,3%	Desire to visit foreign countries to live, work, or study.
6	Friendliness	20,6%	Perceptions of how welcoming foreign countries are to tourists.
7	Foreign Policy	31%	Trust in foreign countries approach to global affairs.

Polling data are thus calculated upon the above-mentioned 7 categories, and the following chart is what emerges:

rank	Country	rank	Country
1	Italy	11	New Zealand
2	Switzerland	12	Norway
3	France	13	U.S.
4	Sweden	14	Finland
5	Canada	15	Netherlands
6	Australia	16	Austria
7	Japan	17	Ireland
8	Spain	18	Denmark
9	Germany	19	Belgium
10	U.K.	20	Portugal

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4. Soft Power and National Branding

“Country branding means much more than adding a ‘made in’ label to a product. A product’s country of origin constitutes an important piece of branding that, in many cases, can be so influential it overtakes the brand’s other reputation builders” (Laforet: 2010).

As the previous chapter was devoted to an overview of soft power, this chapter will build upon it, and will figure out concrete examples of interaction between soft power and national branding: real cases where soft power and national branding go hand in hand together. Given the impossibility to consider all states and all international organisations, the arbitrary choice is to consider four states (the U.S., France, China and Italy), and one international organisation (the European Union) as representative of the whole.

4.1 The U.S. and the Hollywood model

"Real power means you can get what you want without having to exert violence". The words of President Barack Obama highlighted the importance of soft power for the United States of America. Soft power can be hardcore power. Due to the vast number of soft power resources, in time America became the superpower of soft power. For years, it has been unrivalled in its ability to attract people from all around the world. For instance, during the Cold War, economic initiatives such as the Marshall Plan created international goodwill and enable Washington to influence its allies and adversaries alike.

In the 21st Century as it has been in the 20th, American soft power leads worldwide the areas of culture, education and technological innovation. Its culture has the universal reach and remains the most pervasive globally. Hollywood contribution to the soft power of America cannot be denied: U.S. movies and music industries sets the global trends by introducing billions of people to American culture and lifestyle. For years, it has been the most popular

and successful country in Olympic competitions which will likely to continue in the coming years, though a number of countries, noticeably the U.K. (UK sport: 2020) and China (Sport Business: 2019), are heavily investing on it. Having the best universities in the world, the U.S. attracts more international students than any other state. Furthermore, its contribution to the research field is far greater than any other country (Soft power 30: 2019).

The American brands have managed to rule the world for decades by influencing socio-economic-political wellbeing of the people. The U.S. is home to the most popular and largest digital and tech companies in the world – Apple, Microsoft, Google, Tesla, Facebook, Instagram, Twitter, just to name a few. The recent addition Netflix and Uber is further transforming the way the world interacts and live.

Besides, the U.S. large contribution to many multilateral institutions has positively influenced the people abroad. Oscars, noble prizes and peacekeeping missions are the vehicle for soft power and a way to boost the nation's reputation. Similarly, America's democratic ideals, its attractive and innovative business models and its diplomatic missions abroad are appealing to populations around the world.

A summary of the indicators reported in chapter # 3 shows how the US is performing in top positions in substantially all areas related to soft power:

Indicator	KPI	N	Rank worldwide	source
Public Diplomacy	Total diplomatic posts	273	2	Global Diplomatic Index (Lowry: 2019)
National Brand	UD\$	\$27.8T	1	Brand Finance: 2019
Movies Production	N of movies produced	18,231	1	The Numbers: 2020
Development Aid	US\$	\$ 31.1 B	2	Wikipedia: 2020
Tourism	N. visitors	80 M	3	World Atlas: 2020
Most Visited Museum (Metropolitan Museum of Art)	N visitors	6,953,927	3	Wikipedia: 2020
Start-Ups	N of Start-Ups	47,931	1	Start-Up Ranking: 2020
University Ranking (QS)	HEIs in top 200	66	1	QS: 2019
Soft power 30	Score	77.40	5	Soft Power 30: 2019
Soft power 30 / polling	Score		13	Soft Power 30: 2019

The 2019 Soft Power 30 index shows the U.S. soft power decline, falling from first place in 2016 to fifth place in 2019.

General	Digital	Enterprise	Education	Culture	Engagement	Government	Polling
5	1	5	1	1	4	21	13

Probably, the "America First" slogan hard-pressed American government lose its geopolitical centre (and indeed 5 positions in the "government" indicator in one year), but the U.S. brands still manage to attract the positive image abroad. President Donald Trump limited interest in dealing with environmental challenges, US-China trade war and his decisions to withdraw from multilateral institutions contributes to the decline of American soft power. Furthermore, President Trump's chaotic management of the coronavirus outbreak during the first quarter of 2020, and his bitter criticism of WHO policies, threatening funding cuts to that international organisation, either did not help (PBS: 2020).

However, no single President can eradicate the soft power resources that the U.S. has accumulated over decades: data on American soft power shows that soft power assets that operate independently from the government are the strongest, and the U.S. is world-beating in those areas.

4.2 France between tourism, global assertiveness, and start-ups

Home to 'Eiffel Tower and Louvre', the world's top tourist destinations, and with astonishing performances in all indexes, France has become the world leader of soft power. It shows the most impressive development in the last four years overtaking major soft powers – the UK, the US, Germany and Canada - and secure top spot in 2019 Soft Power Index (Soft Power 30: 2019).

General	Digital	Enterprise	Education	Culture	Engagement	Government	Polling
1	4	18	8	3	1	15	3

With mass protests, unemployment, public debt, unfulfilled promises, inequality and youth riots, the early 21st century was tough for France. On the world stage, the shifts in the global power structure brought west on the verge of disaster and France witnessed the decline in its global output share. A further blow came in the form of highly traumatic events of terrorism targeting the highest symbol of French society. However, France did not collapse: on the contrary, the shock wave woke the entire nation. In 2016, the election of the energetic, reforming and globally-minded President Emmanuel Macron brought hope for the nation and noticeably boost the soft power of France.

The greatest strength and influence of France lies in its capillary diplomatic network, its proactive membership to international and multilateral organisations, a wide number of diplomatic cultural missions. The extensive Alliance Française network is one of the main assets of France. Furthermore, the youngest ever President of France is exploiting the French diplomatic machinery to good use: for instance, the European Union Commission leadership succession agreement and successful 2019 G7 summit shows the rising diplomatic importance of France (Belin, Boris: 2018).

The digital understanding of President Macron extensively contributed to France's soft power. According to softpower30 digital sub-index, France secures second position overtaking Germany and the U.K. In promoting a 'French brand' digital technology, Paris offers many opportunities: apparently, the Ville Lumière is now the fastest-growing major tech hub in Europe (Sifted: 2019). Like Canadian Prime Minister Justin Trudeau, Macron uses social media to spur their global audience.

Emmanuel Macron obsession with “culture” has boosted France’s global influence. In his speech at 2017 Frankfurt Book Fair, he said: “without culture, there is no Europe”. To better democratize French culture, he initiates a “Passe Culture” program. The strong performances in the art, film, food and tourism metrics contribute to its rich culture. Its cuisine is recognized by UNESCO as an 'Intangible Cultural Heritage' and it has the largest number of Michelin starred restaurants in the world (Desgranges: 2018). Home to cultural icons, museums, galleries and UNESCO World Heritage Sites, the country has re-established its position as a global leader. And with Louvre being the most visited museum globally, it is no surprise that France boasts the highest number of tourist arrivals in the world. The support of the international community on the Notre-Dame cathedral fire in April 2019 shows the unique position of France as a touchstone for global culture and heritage. The global charm of French culture is also apparent in an event such as the Cannes Film Festival. Furthermore, the compensation of colonial treasures to Africa and the President's visit to Nigeria was aimed at redefining French relationship to its former colonies (Chhor: 2018). Besides, France is today investing enormous capitals to develop a network of French-language schools throughout Africa, with the explicit goal to make French one of the most spoken languages in the World within the mid of the 21st century (Caspian Report: 2020). It is no surprise to see France performing in top 10 positions, often in top 3, in all indicators selected for this chapter:

Indicator	KPI	N	Rank worldwide	source
Public Diplomacy	Total diplomatic posts	267	4	Global Diplomatic Index (Lowry: 2019)
National Brand	UD\$	\$3.1T	6	Brand Finance: 2019
Movies Production	N of movies produced	2.697	3	The Numbers: 2020
Development Aid	US\$	\$9,2 B	7	Wikipedia: 2020
Tourism	N. visitors	89 M	1	World Atlas: 2020

Most Visited Museum (Louvre)	N visitors	10.200.000	1	Wikipedia: 2020
Start-Ups	N of Start-Ups	1.452	8	Start-up Ranking: 2020
University Ranking (QS)	HEIs in top 200	9	6	QS: 2019
Soft power 30	Score	80,28	1	Soft Power 30: 2019
Soft power 30 / polling	Score		3	Soft Power 30: 2019

With his unique boldness and self-confidence, Macron has transformed France into a “startup power”. He invested in the European Union where no one dared to invest and modernise anymore: as soon as he came to power, he insisted on economic reforms, European defence integration and democratic conventions on the future of E.U.

There is no doubt that France soft power has been nurtured over centuries and will continue to serve the country in the coming years; however, the real factor in France's top position in soft power index is its enhanced performance in the international polling. And the foreign policy of France has played a key role in shaping France's image in the world. Furthermore, thanks to a president active on the global stage, to a U.K. consumed by Brexit and, lastly, by an underestimated coronavirus outbreak, and a politically weakened German Chancellor Angela Merkel, there are real opportunities for France to become a leading soft power superpower in coming years (Soft Power 30: 2019).

4.3 China between an economic powerhouse and closed government model

The Chinese realised the importance of soft power in the early 21st Century. The former President Hu Jintao in his speech at the 17th National Congress in 2007 remarked that ‘the rejuvenation of the Chinese nation is linked to the ability of China to deploy soft power’. More recently in 2014, Chinese President Xi Jinping stated, “we should increase China’s soft power, give a good Chinese narrative and better communicate China’s messages to the world”.

During 2019, China's rising global power was faced with numerous geopolitical challenges. For instance, the U.S.-China trade war, increasing criticism on the treatment of Uighurs in the Xinjiang province, escalating tensions in the South China sea, anti – Beijing demonstrations in Hong Kong, and, last, the coronavirus outbreak in the Wuhan district. All these developments negatively affected the Chinese image in the world.

Despite this, the world has seen a rise in Chinese efforts to develop its soft power. And it secures 27th position in the 2019 Soft Power 30 index (Soft Power 30: 2019).

General	Digital	Enterprise	Education	Culture	Engagement	Government	Polling
27	30	21	17	8	10	29	29

The Chinese "Go Global" strategy caught the attention of international audiences. It plays an important part in promoting the attractiveness of Chinese culture. The government has invested tens of billions of dollars to expand its soft power resources. China's strength lies in its culture. It is the home of the largest number of UNESCO World Heritage Sites and it won the second-highest number of Olympic medals in 2016 Rio Summer Olympics and 2018 Pyeongchang Winter Olympics. Furthermore, through Chinese language, films, arts, educational exchanges and pop culture icons, Beijing leaders are disseminating a positive image of the country in the international arena. The Confucius Institute, whose purpose is to promote Chinese language and culture abroad, works in the same way as Alliance Française or British Council of France and UK do. Similarly, the Chinese Embassy and Ministry of Culture provides financial support to promote cultural events such as Lunar New Year celebrations across the world. Not only state but also non-state actors are contributing to boost China's appeal in the world by sponsoring major international events like the World Cup and scientific innovation (China Power: 2019).

Overall, China performs tremendously in most selected indicators, probably as a result of far-sight investments, such as in the case of movies production, education, and tourism. Again, it appears that the fundamentals do not go together well with the country image that Beijing manages to release and promote internationally, where elements such as internal diplomacy, comprehension towards activists, and tolerance to minorities also play a key role.

Indicator	KPI	N	Rank worldwide	source
Public Diplomacy	Total diplomatic posts	276	1	Global Diplomatic Index (Lowry: 2019)
National Brand	UD\$	\$19.5T	2	Brand Finance: 2019
Movies Production	N of movies produced	1.667	4	The Numbers: 2020
Development Aid	US\$	\$ 38 B	1	Wikipedia: 2020
Tourism	N. visitors	63 M	4	World Atlas: 2020
Most Visited Museum (National Museum of China)	N visitors	8.610.092	2	Wikipedia: 2020
Start-Ups	N of Start-Ups	571	20	Start-up Ranking: 2020
University Ranking (QS)	HEIs in top 200	7	8	QS: 2019
Soft power 30	Score	51,25	27	Soft Power 30: 2019
Soft power 30 / polling	Score		29	Soft Power 30: 2019

The Chinese "Go Global" strategy has achieved substantial success, however, the consensus among observers is that 'China's cultural influence falls behind its economic weight in the global economy'. From an economic perspective, the 'Belt and Road Initiative (BRI), is the vehicle of soft power that aims for regional connectivity. It intends to unite Silk Road Economic Belt and Maritime Silk Road through a huge network of roads, railways, ports and telecommunication infrastructure to boost economic integration from China to Asia, Africa, Europe and beyond. This Chinese approach to development has lifted millions of people out of poverty. Furthermore, at a cultural level, the Silk Road could awaken a shared cultural and historical memory, connecting China to countries in Asia that once shared the ancient Silk Road. However, Xi Jinping flagship project has been receiving praise

as well as criticism, for being the soft power catalyst and a debt trap. This colossal endeavour of China could make or break its future (Yiwu: 2018).

Analysts argue that, despite spending billions of dollars and prioritising soft power at every level, China has failed to capture the attention and imagination of wider global audiences. The negative global perceptions of China are due to its human rights issues, a closed model of government, its foreign policy and lack of political participation and civil liberties. Moreover, due to the absence of an official online presence on social media and a low number of internet users, China has failed to perform well in the digital sub-index.

Although culture is an effective soft power tool for China, international image is strongly shaped by the country's approach to world events. And for Chinese to use their rising global power status to attract positive image, they should find a balance between these conflicting soft power forces (Albert, 2018).

For sure, it will be interesting to see how successful will the fight of coronavirus during the first months of 2020 will be, and whether it will contribute, or not, to an enhanced global perception of China as a modern, effective, state, capable to protect its citizens. and to help foreign states, too.

4.4 E.U.'s Erasmus as a soft power tool: towards a European ruling elite?

A unique political and economic partnership of 27 countries, the European Union (E.U.), is considered as the leading exponent of soft power approach. The foundations of E.U. soft power can be found in the European Security Strategy in 2003. Following the developments of Iraq war and American dominance, the member states agreed on the need for the E.U. to become a major soft power. The document outlined the strategy for EU, i.e. multilateralism, promotion of universal values and peacekeeping and basic soft power values.

The E.U. has played significant soft power role in the international arena. First, its role as mediator of conflicts, such that between Israel and Palestine. Similarly, the Union played a similar role in the recent talks over the Iran nuclear deal. Secondly, its intermediary role between South and North, poor and rich has been praised all over the world. Thirdly, being the principal actor of multilateral frameworks and global governance such as G7 and G20 boosted its soft power image globally. Finally, the union assumed a distinct foreign policy position on several global issues including global warming, international law and ICC. Thus, all these roles reflect the importance of soft power for the E.U. (McMillan, 2018).

The successful enlargement policies of represent another soft power victory for the E.U.: “the prospect of joining a union can be a powerful catalyst for stabilization” (Sirello: 2012).

In the current global scenario, culture has enormous and untapped potential. The E.U. has long understood the power of culture as an instrument of Europe's soft power. It has launched the Cultural Diplomacy Platform to increase the understanding of the organisation through engagement and intercultural dialogue. Moreover, the organization is the world's largest market that is a magnet to an international audience. The biggest advocate of human rights, a convinced advocate of Kyoto Protocol, the heart of football, of fashion, a leading automobile designer and constructor, and world's top tourist destination: combined, the E.U. is still the soft power superpower, containing the largest number of states in Soft Power 30 index than any other continent (McMillan: 2018).

For decades Europe has attracted students and researchers from all over the world due to its excellence in education and scientific research. The E.U. is consciously using higher education as a means to project her soft power in its neighbourhood. For instance, the Erasmus Program (European Community Action Scheme for the Mobility of University Students) is a soft power instrument in European neighbouring states. Increasing people to people contact, its participants will act as an informal E.U. ambassador, thereby, becoming transporters of the Union's soft power and influencing cultural and social perceptions of E.U.

across the world. However, the ongoing debate in the international arena is whether the higher education program funded by developed countries is either a brain drain or brain gain (Dempsey: 2012).

The recent developments that have shaken Europe such as the refugee crisis, Brexit, the financial crisis, raised Euroscepticism and greatly undermined her soft power image. However, the E.U. is far from losing her soft power, which in a sense adds to her member states. It is still one of the richest, technologically advanced, stable and attractive regions of the world. The strongest regional organization is still an ideal of liberalism and multilateralism in the international arena.

4.5 The '3F': fashion, food and furniture. Is Italian model outdated?

Italy is the only country that can challenge France, the top country in the soft power index when it comes to fashion, food, art and culture. In the 2019 soft power 30 index, Italy has shot up in the global ranking securing 11th position (Soft Power 30: 2019). Its rise may come as surprise to many, given the recent political turmoil and her endemic fragile economy.

The various dimensions of Italy soft power include art, architecture, music, food, fashion, literature, furniture, peacekeeping, and diplomacy, her diplomatic network being one of the most branched overall. Italy holds the largest UNESCO World Heritage Sites, her lifestyle and landscapes draw tourist from all over the world. Due to the iconic Italian cuisine, a lot of tourism is often food tourism, which is globally on the rise (Soft Power 30: 2019).

In the imagination of the most, Italy remains home of beautiful landscapes and historical cities, world-renown cuisine, stylish clothes, and fine museums, villas, and geographical beauty. In other words, an interesting combination of soft power and branding elements that, together, constitute the peculiar Italian model which is made up also of industrial production (the Country's GDP is 8th in the World), and, in turn, of the country's export capabilities.

If the common perception about made in Italy is made of clothes, perfumes, and shoes, the reality says that the top five categories are machinery, vehicles, electrical machinery, pharmaceuticals, and plastic (World's Top Exports: 2020), which also substantially contribute in the maintenance of the national brand.

On the negative side, the intricate bureaucratic trap, political instability, endemic tax evasion, and inefficient infrastructures, to name a few, have always burdened businesses, forcing some out of the country. Cheaper workforce, less bureaucracy and more dynamic markets are just some of the reasons why so many historic Italian brands are have abandoned the Mediterranean country.

What follows is a chart summing up the indicators reported for in Chapter # 4.

Indicator	KPI	N	Rank worldwide	source
Public Diplomacy	Total diplomatic posts	207	10	Global Diplomatic Index (Lowry: 2019)
National Brand	UD\$	\$2,1 T	10	Brand Finance: 2019
Movies Production	N of movies produced	1.101	9	The Numbers: 2020
Development Aid	US\$	\$3,84 B	11	Wikipedia: 2020
Tourism	N. visitors	62 M	7	World Atlas: 2020
Most Visited Museum (Vatican)	N visitors	6,756,186	4	Wikipedia: 2020
Start-Ups	N of Start-Ups	883	11	Start-Up Ranking: 2020
University Ranking (QS)	HEIs in top 200	2	11	QS: 2019
Soft power 30	Score	71,38	11	Soft Power 30: 2019
Soft power 30 / polling	Score		1	Soft Power 30: 2019

Italy, therefore, is positioned around the 10th position in all rankings considered, globally.

If we consider the Softpower30 index alone, the snapshot for Italy is as follows:

General	Digital	Enterprise	Education	Culture	Engagement	Government	Polling
11	24	25	13	7	7	22	1

Besides the encouraging general score, the chart shows how the Country performs very well in culture and engagement, and quite well in education, though this indicator lost 4 positions from 2018. The sectors where Italy is generally associated with below-the-par performance are those effectively lowering the average in this very chart, i.e. digital, enterprise, and government: “the Government, Enterprise, and Digital sub-indices have shown no marked increases” (Portland: 2019). Quite interestingly, the country is #1 in the World as far as the polling part is concerned: “Its position as a cultural superpower and its consistently strong polling – a reflection of the global omnipresence of Italian cuisine and its iconic, internationally-renowned luxury brands – mean the country’s score can shrug off weak standings in several other sub-indices”. (Portland: 2019).

Therefore, Italy is generally perceived as a soft power source by other countries, and performs well in the cultural and diplomatic domains, whereas the industrial indicators are biased towards luxury. In a sense, Italy is associated as a manufacture hub for top-end products, the technology bit playing somehow a less significant role, although the reality shows how exports are principally made up of technologic products, not shoes and clothes alone. Few Italian brands make it in the top World positions: for example, in the well-known Brandz.com index, only Gucci entered the top 100 in 2019 (Brandz.com: 2019).

This perception is commonly spread among both experts and no experts, to the point that the Country yearly organises a well-known “Save the Brand” initiative, to safeguard the perception and the image (in a world, the brand) to its most known made-in-Italy products, i.e. Fashion, Food, and Furniture, a ranking aiming to single out the best Italian companies in these domains (Save the Brand: 2019). Save the Brand edits one publication annually, and holds, usually in November, an exhibition associated with a prize regularly assigned to best performing brand.

Whereas, the “Made in Italy” trademark is managed by ITIP – Istituto Tutela Prodotti Italiani (Institute for the safeguard of Italian Products): it grants a “100% made in Italy” certificate to a product which is entirely manufactured in Italy (Made in Italy: 2020).

The recent evolution of the 3P model is the 4A acronym, 4A standing for Food (“Alimentazione”), Clothes and fashion (“Abbigliamento e moda”), Design (“Arredamento”) and Automation and mechanics (“Automazione e meccanica”), thereby including in the features of Italian national brand automation and mechanics, too. This model is being proposed by Futur404, claiming that “Italy’s appeal, for example, is deeply linked to his history, art, centuries-old architecture, culture and elegance, landscapes and – of course – his charismatic inhabitants. The result is that “Made in Italy” overcomes the concept of country-of-origin labelling, to represent the endpoint of the entire evolutionary path of Italian civilization. (Futur404: 2020)”.

However, the strong public health policy Italy is promoting in February and March 2020 to safeguard its population from the effects of the coronavirus spread, will possibly gain the Country the praise of the international community, and conversely secure Italy some points as a respectable country, with a leading role in the fight of pandemic diseases.

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5. The internationalisation of higher education today

5.1 What is internationalisation

The ongoing debate about why are universities internationalising goes well beyond the scope of the present work. And indeed the first quarter of 2020, the period of time while this research was being written, witnessed a sharp retrenchment of all academic internationalisation activities, from student mobility to scholar travel, to student recruitment, due to the coronavirus pandemic outbreak.

In this context, the international debate rotates on how to grant an international experience without moving to another country (University of World News: 2020), and someone argues internationalisation of higher education, in the form it was operating before the pandemic, has come to an end (Times Higher Education¹: 2020).

That said, an inevitably short introduction is due to exemplify some key features characterising this phenomenon.

The standard definition of the internationalisation of higher education is Jane Knight's: "the process of integrating an international/intercultural dimension into the teaching, research and service functions of the institution" (Knight: 1993). Some years later, the concept was updated by Professor Knight herself as follows: "internationalization at the national, sector and institutional levels is defined as the process of integrating an international, intercultural, or global dimension into the purpose, functions or delivery of postsecondary education" (Knight: 2003).

The process is not mandatory, as states, sectors, and institutions are not compelled to internationalise their activities: it's a choice that they may or may not be willing to undertake. Fact is, we live in a globalised world, where all the fundamental elements of society and economy are *de facto* international: from production to media, from the web to the global

language, which is English. Consequently, there exists a correlation between globalisation, which is a macroeconomic context where everybody operates in the XXI century, and the internationalisation of tertiary education, which “includes the policies and practices undertaken by academic systems and institutions—and even individuals—to cope with the global academic environment” [Knight and Altbach: 2007].

As we will see, the motivations for internationalisation include commercial advantage, knowledge and language acquisition, enhancing the curriculum with international content, and many others.

5.2 Why internationalisation

In a seminal work published in 2002 and titled “Internationalization of Higher Education in the United States of America and Europe” (de Wit: 2002), the Dutch scholar Hans de Wit described what in his opinion were the four main drivers that led internationalisation efforts, and namely: academic, economic, political, and social/cultural. After almost 20 years, such categorisation upholds its descriptive value and hence will be adopted in the present work. What follows is an itemisation of the four above-mentioned types, whereas a list of the main actors within the HEI internationalisation will be provided for in chapter # 6.

5.2.1 Academic

- Reputation and rankings. All rankings include at least one indicator based upon the level of internationalisation of the measured HEIs or, in other words, HEIs are measured, and their reputation evaluated also measuring KPIs related to the degree they are internationalised.

- Quality enhancement. The mobility of researchers and international co-operation foster the quality of home research and teaching, which, in a closed environment, would develop differently.
- Advancing knowledge. This is one of the main *raison d'être* of academia, and international interchange advantages such progression.
- Capacity building and enhancement. Often HEIs go international to search for a solution they would not otherwise find at home and, conversely, often HEIs offer in the international market solutions for less developed fellow institutions, those solutions having already successfully experimented at home.
- The law of supply and demand. There are states where the demand for higher education is greater than the available supply and vice versa; it's therefore natural that, at an international level, such necessities find compensation.

5.2.2 Economic

- Revenues from international students. These gains bring prosperity to both HEIs hosting international students, as well as to the states where they operate. It follows that some states are keen on welcoming international students exactly for that reason.
- Smart immigration policies. These can be developed by future-oriented states willing to import qualified workers that, after graduating, may act as bridges between two states and two cultures.
- Internationalisation at home. Inoculating elements of internationalisation in home institutions and students will help future workforce be better prepared to face the challenges of a marketplace continuously evolving.

5.2.3 Political

- International co-operation. Policy-makers may want to foster internationalisation to enhance the relations with a given state, or states.
- National security. As a long-term goal, governments may be willing to invest in internationalisation to form a future generation of leaders keen on the country where they studied when young.
- Soft power development. Coupled with public diplomacy efforts (see chapter # 3), states may be willing to invest in internationalisation to enhance their soft power status. As we have seen, asserting soft power via the development of selected KPIs pays often off in terms when building a positive, assertive image internationally.

5.2.4 Social / cultural

- Mutual understanding. By definition, cross-border relations foster mutual understanding among states, élites, and leaders.
- Tackling global problems. There are some global challenges (e.g., climate change, or the spreading of a pandemic) that can be addressed only via international co-operation: in this sense, the internationalisation of higher education offers formidable instruments of co-operation.

5.3 “How to” internationalise

Techniques, processes and procedures on how to internationalise are as numerous as HEIs are, since every institution eventually develops its methodology, depending upon variables such as the State where they operate, the level of commitment of the governance, the

budget available and the administrative capability of the institution, its governmental policies, existing guidelines, planned investments, and so forth.

In 2013, the EUA (European University Association) provided a non-exhaustive list of the most widespread instruments HEIs can make use of to achieve internationalisation (EUA: 2013):

- The signing and management of international agreements, and consequently the exchange of students;
- The attraction of degree-seeking students;
- Internationalisation at home, i.e. the implementation of domestic measures that benefit non-mobile students, such as courses held in English, international conferences, internationalisation of the curricula;
- Continuous and continuing education for administrative staff;
- Double and Joint Degrees (DJDs);
- Attention to international rankings;
- Programs of attraction of international faculty, including visiting professors and researchers;
- Participation in international consortia;
- On line teaching activities, including MOOCs;
- Third country presence, i.e. via international branch campuses (IBCs).

EUA's parameters are still valid, though some items today seem to bear less importance than in 2013, as for example third-country presence/branch campuses. As Philip Altbach and Hans de Wit have shown (Times Higher Education: 2020), the pace of establishing new branch campuses considerably slowed down: if in 2015 there were 263 IBCs, compared to with just 84 in 2000, "only a handful have opened since [2015], and IBCs

still account only for perhaps 225,000 students, out of 200 million worldwide (of whom more than 5 million are internationally mobile)".

In 2019, the 5th IAU (International Association of Universities) Global Survey collected replies and entries from 907 HEIs from 126 countries (IAU: 2019). Returned results are in a sense quite overlapping to EUA's, though some dissimilarities emerge.

- Internationalisation as an institutional priority. The vast majority of respondents see internationalisation as an institutional priority, its importance and benefits further growing in time. Commodification and commercialization of education programme are still considered as the main societal risk at a global level, with "Brain drain" becoming very important in all regions except North America.
- Internationalisation Policy and Activities. Whilst "there is an ongoing movement towards a strategic approach to internationalization in the majority of HEIs in the world" student mobility as a whole, be it incoming or outgoing, credit or degree mobility, is the top priority in all regions, followed by strategic partnerships and international research collaboration.

Policies, the survey reports, often rely on geographical foci, in the sense that it may be impossible, and possibly unnecessary, to focus on the entire world – not least because of the non-infinite (by definition) availability of funds HEIs ensure to internationalisation processes and activities. While half of the respondents are somehow involved in Transnational Education (TNE), double and joint degree programmes (DJDs) are perceived as a key internationalisation tools.

- Internationalisation of research. "At HEIs where research is important, international research is an integral part of their institutional internationalization activities, [while] almost three-quarters of teaching-focused HEIs have no or very little involvement in international research". The key element for HEIs is granting adequate sources of

funding of international research: grants from international organizations and agencies, grants from national agencies, and the institution's resources.

- Human resources and staff development. This feature includes both the attraction and the retention, of international staff members, not least because of their relevance within rankings, as well as their international experience, though this is often considered an added value than a fundamental requirement.
- Student mobility. Though internationally, the percentage of degree-seeking students remains low, the attraction of foreign students remains an institution's favourite. Competition among HEIs, lack of funding, language barriers, are still perceived as obstacles when recruiting internationally. Student mobility includes credit mobility, a common feature for substantially all institution surveyed, as some sort of action to help and support refugees.
- Internationalisation of the curriculum / Internationalisation at home, seen as a way to enhance and develop international perspectives of students, together with professional development for faculty to enhance their ability to integrate international/intercultural dimensions into teaching.

HEIs operate within national, regional, and international frameworks: it is often the state where institutions operate that releases procedures, regulations and legislation about internationalisation. And it's often the state that endorses and funds promotion agencies, be they entirely public, or a mix of private and public enterprises.

In turn, state guidelines often depend on several factors such as national immigration policies, funding available, and internal lobbying activities, such as, for example, white papers released by rectors' associations, and working groups proceedings. Regional organisations are often active, too, such in the case of the EU and her Erasmus + programme. It follows that an institution's internationalisation agenda is the result of a

complex stratification of different-layer policies, coupled with the interest, or lack of interest, of its governance and faculty.

Time frame is also relevant, as the lens through which we perceive a given institution's, or group of institutions', internationalisation strategy is necessarily deviated by our today's perception of what internationalisation is. "Internationalisation has developed from many separate initiatives to become a strategic objective in its own right during a period in which HE has become a global commodity" [Soliman, Anchor & Taylor: 2019], as "international strategies as deliberate or emergent depends on the time frame considered. It was found the international strategy was deliberate in each strategic period, whereas it was emergent over a longer time frame of several strategic periods". The internal organisation of institutions, too, changed over time, with the "external relation office" bearing little or no importance in the 1990s, gradually becoming more central in the following decades, up to being considered as a primary strategic resource nowadays. To put things even further in context, internationalisation in the first quarter of 2020, after the coronavirus outbreak, is different from that widely accepted only months before.

No wonder, therefore, that a comprehensive approach is gaining consensus together with the perceived necessity to systemise the internationalisation initiatives in and outside the campus.

5.4 Comprehensive internationalisation

ACE, the American Council on Education, is a Washington-based association of US HEIs that proposed the concept of *Comprehensive internationalization*: "a strategic, coordinated process that seeks to align and integrate policies, programs, and initiatives to position colleges and universities as more globally oriented and internationally connected institutions" (ACE: 2020). ACE has identified six pillars that require attention and resources to achieve truly comprehensive internationalization.

Together, these comprise the ACE Model for Comprehensive Internationalization, which can be simplified as follows:

- Articulated Institutional Commitment includes both strategic planning and governance's commitment, which should also be institutionalised via a permanent internationalisation committee involving campus stakeholders.
- Administrative Leadership, Structure, and Staffing, devoted and committed to internationalisation.
- Curriculum, Co-curriculum, and Learning Outcomes. On the one side, all learners are exposed to internationalisation via an internationalised curriculum, on the other "internationally-focused competencies are included in campus-wide student learning outcome goals and assessments."
- Faculty Policies and Practices. Faculty tenure, hiring, and mobility are based upon a mechanism that favour international experience.
- Student Mobility is based upon financial aid and an easy credit-transfer-policy; students are thoroughly sustained by academic and social support structures and programs.
- Collaboration and Partnerships are organised through appropriate procedures and "provide international and cross-cultural experiences for students and faculty, enhance the curriculum, generate revenue, and raise the visibility of institutions at home and around the world".

5.5 Student exchange and the attraction of degree-seeking students

Having accounted for global trends and current definitions, the second part of this chapter focuses on two main pillars of every internationalisation policy and activity: credit-mobile students and degree-seeking students. Combined, the two groups are often referred to as "mobile students", thus contributing to a confusing terminology also among experts.

- “Credit-mobile” students refer to “study-abroad” or exchange students, such as those in the EU’s Erasmus + programme. These students endure their enrollment in their home institutions while receiving a small number of credits from foreign institutions (Van Mol and Ekamper: 2016). Due to their fluid enrollment status, most statistics on international students do not include credit-mobile students. The activities of credit-mobile students are made possible by the adoption of (mainly) bilateral agreements signed by their home institution, either within the framework of a wider umbrella (such as in the case of Erasmus + Programme) or on a free-standing basis.
- “Degree-seeking” students refer to learners who are not citizens of the state where the institution they are enrolled in is located. They are thus enrolled in higher education degree courses and study c/o the foreign institution for the entire period of their studies. If the keyword defining credit-seekers is the agreement between institutions, the keyword to define degree-seekers is international recruitment, which heavily relies on branding, communication, and marketing.

At least, the history of student exchange dates back to the last century. The U.S. established the ‘Council on International Educational Exchange’ back in 1951, and it quickly began sending thousands of American students to Europe each year. Europe established its exchange programme, Erasmus, in 1987: since its inception, more than 9 million people have participated in the program. Today, students are in the order of nearly 300.000 a year, compared with only 3,244 in 1987. Other programmes followed (for example, AUN – ASEAN University Network), coupled with university-sponsored mobility programmes.

Overall, there is scarcity of world statistic about credit-mobile students, even for a widely-known programme as Erasmus; an in-depth work would require an analysis that goes

beyond the scope of the present work. What can be sustained here is, student exchange started being considered as standard institutional policies of the universities in the 1990s. The organised and professional global search for degree-seeking students also dates back sometimes in the 1990s, at least in the Anglo-Saxon world. Writing in 2003, Tim Mazzarol describes how the second half of the twentieth century saw the development of a global market in international education [Mazzarol: 2003]. Following the Second World War, the flow of international students undertaking courses at all levels grew rapidly as developing countries sought to educate their populations. By the century's end, 1,5 million students were enrolled internationally at the HE level. Driving this market expansion was a combination of forces that both pushed the students from their countries of origin and simultaneously pulled them toward certain host nations. By the 1990s, the HE systems of many host nations (e.g. Australia, Canada, the USA, the UK and New Zealand) had become more market-focused and institutions were adopting professional marketing strategies to recruit students into fee-paying programs. For many education institutions, such fees had become a critical source of financing.

The 'three waves' Mazzarol envisages in his work are:

- Students. Students have been the forerunners of internationalisation, getting mobile before institutions, and searching for the needed level, or quality, of education where they could find it.
- HEIs. Institutions "moving forward into the export channel [...] and establishing a presence in international markets through "twinning" programs" [Mazzarol: 2003].
- Branch campuses. IBCs are considered as the *non plus ultra* form of internationalisation, with HEIs establishing business directly in the market where they expected to sell their product: education.

5.6 Mobile students as the main issue of the internationalisation of higher education

Internationally mobile students are therefore the first interest for each HEI aspiring to maintain, or gain, an enhanced international status. As IAU, the International Association of Universities puts it: "in terms of activities, student mobility as a whole, be it incoming or outgoing, credit or degree mobility, is the top priority in all regions, followed by strategic partnerships and international research collaboration" (IAU: 2019).

Foreign students in fact guarantee the satisfaction of multiple needs shown by HEIs: the economic element, the pursuit of academic excellence, the importance of rankings, and the need to make available the benefits of internationalisations to home students via internationalisation at home activities.

Consequently, this phenomenon presents multiple features: this section will account for some of them.

5.6.1 The internationalisation of the classroom/internationalisation at home

Non-mobile home student can benefit from internationalisation simply by attending classes with their international colleagues. "Personality development is a very invaluable outcome of global classroom programs. When students meet other students from very different background and cultures, they learn about the diversity found in the world and they learn to exist and live in harmony with all the different kinds of people and the different cultures that are there" (Cultus: 2015).

5.6.2 The law of supply and demand

As seen above, there exists a law of supply and demand in academia, too. Narrowing this concept down to the global availability of student places, the issue has to do with the increase of population of many regions worldwide and, the growth of those regions'

economies and simultaneously the shortage of places c/o the universities of those same regions (Sartor: 2019). Some countries, such as China (BBC: 2016), are establishing new universities at a frantic pace. Others nations, such as India, struggle with fast-increasing population: "currently, around 25 per cent of students graduating from high school in India go on to pursue higher education. The Indian government wants that figure to reach 50 per cent by 2035 - doubling the country's college and university enrollment from its current base of around 35 million students" (Inside Higher Ed: 2020).

Other major net international student senders, where physical places available are lesser than student willing to pursue a degree, including Vietnam, Indonesia, and Turkey, just to mention a few.

5.6.3 The attraction of qualified talents

For top universities, international students have been a critical source of top talent. But for average universities, too, hosting a good student represents an interesting investment. First and foremost, they would enhance the general intellectual level of the classroom; second, they contribute to academic research, via theses, presentations, and essays; last, they may be willing to pursue an early academic career c/o the host institution, thus, amongst other things, enhancing other internationalisation indicators.

5.6.4 Positioning in international rankings

On the other end, most international rankings (with the noticeable exception of ARWU) account for the percentage of international degree-seeking students within their parameters. Rankings, thus, consider the presence of international students as a positive component of the international standing of HEIs.

	QS	THE	ARWU
International student ratio	5%	2.5%	0%
International staff ratio	5%	2.5%	0%
International collaboration	0%	2.5%	0%
TOTAL	10%	7.5%	0%

Other less relevant rankings, such as for example U-multirank, include the international students' dimension in their KPIs.

5.7 Degree-seeking students as a source of revenues

As seen above when accounting to economic drivers to internationalisation, the attraction or, better: the enrolment of international students represents a source of wealth for both institutions as well as for the states hosting them. Also, a wide array of intermediaries may gain from international student circulation: from service providers to travel agencies, from consultants to conference organisers. To simplify the issue, though, we will group the recipients of the wealth generated by international students into two main clusters: institutions, or states.

5.7.1 Institutions

Simple as that, institutions benefit from the enrolment of foreign students either directly, or indirectly. In a straight way (here referred to as 'direct impact'), students pay fees to read for a degree. Often, fees for international students are set at a higher level if compared to the nationals'. For example, in the UK international students need to pay 30% more than the nationals do (Savethestudent: 2019), but the situation is pretty much identical in many HE system to the point that, probably, systems not charging foreign students *more* than the nationals', are the minority.

In countries, such as Australia, where the overall incidence of foreign students is in the order of 24% (Project Atlas: 2019), or U.K. (21%), or Canada and New Zealand (15% each) it is self-evident how international students undoubtedly represent a source of wealth. Some may argue that one of the reasons why (Western) institutions are pushing hard on the international recruitment accelerator, is because they may need to fill the classroom that is getting emptier because of the ageing local population. For example, "Italian schools will suffer from 70,000 fewer enrolments this year [2019]. Today, one in five Italians is over the age of 65, it's predicted that in 20 years that will be one in three." (QS: 2019).

HEIs can count on other revenues directly associated to the expenses made by international students, such as living expenses, the purchase of books and learning material, accommodation costs, down to the money spent in university campus stores.

5.7.2 States

The above-described phenomenon is more significant, its impact (referred to as "indirect impact") more far-reaching, when accounted for nation-states. First, all states apply some form of indirect taxation, such as VAT, which in turn affects in-campus student expenditures. As well as tuition fee payments, international students spend money off-campus on a wide range of goods, services, and activities. Though transport and retail sectors are significant beneficiaries of international students' spending, international students also attract a significant number of overseas visitors during their time studying abroad. The expenditure of these friends and relatives, at hotels, restaurants, and attractions also makes a significant contribution to the economy.

A StudyPortals 2019 research claims the overall impact of international students is in the order of \$300 billion (StudyPortals: 2019), with the US topping the chart with direct impact totalling more than \$ 26 billion per year, and aggregate economic impact in the order of \$ 57 billion. The economic impact is here defined as "the direct impact plus the indirect and

induced impacts, including the ripple effect of international student expenditures on jobs, tax revenues, and household income” (StudyPortals: 2019).

rank	Country	International students (n)	% of global	Direct impact (million USD)	Economic impact (million UDS)
1	USA	971,417	19.1	26.655	57.307
2	China	866,072	17	23.764	51.093
3	UK	432,001	8.5	11.854	25.485
4	Australia	335,512	6.6	9.206	19.793
5	India	301,406	5.9	8.270	17.781
6	France	245,349	4.8	6.732	14.474
7	Germany	244,575	4.8	6.711	14.428
8	Canada	189,478	3.7	5.199	11.178
9	Netherlands	89,92	1.8	2.467	5.305

It is then self-evident how internationalisation can economically pay off well, particularly if total impact is seen in comparison with national GDP.

5.8 Degree-seeking students a source of soft power

The provision of educational opportunities for foreign students is one of the most important instruments of the soft power of the state (Cowan & Arsenault: 2008) and, as we have seen (see Chapter #3) the number of international students enrolled in a particular academic system is counted as a KPI in most industry rankings, as well as in general charts such as the *Softpower30*.

Historically, it is only developed education systems, meeting the requirements of the innovative high-tech economy, and is integrated into the international educational and scientific space, that can compete in the "global competition for minds" and attract the most talented foreign students. The best students, typically apply for the best universities, the best universities are usually defined by rankings, rankings' indicators include those on international students. Therefore, it can be challenging for a non-ranked institution to attract quality students from abroad, whereas the ever-growing number of international degree-

seekers ensure that there are enough students available for nearly all HEIs willing to invest in marketing and recruitment (Sartor: 2019). Simply, best applications will go to preeminent HEIs, ordinary applications to average colleges, and weak applications to modest schools. Where the two broad concepts of the pursuit of soft power, and the attraction of degree-seeking students meet, is here. Beside learning the local language, successful foreign students will gradually become acquainted with the achievements of science and culture of the host country. These students can gain valuable social capital after having being studied abroad. Consequently, after coming back with assimilated understanding of the host state and personal relations, they are expected to become effective transmitters of the language and culture of the country where they have studied (Nye: 2005). As a result, the effectiveness of exposure to the outside world with the help of national education as an instrument of soft power is much higher than by military force or other.

This, in theory and often in practice as well, net of rejection crises. See for example China's release of 99 scholarships in Uganda in 2019: "for these students, China has rapidly become a destination of choice, because of its relative affordability, the availability of scholarships, as well as the relative ease of securing a study visa" (Mulvey: 2020). In general, China provides a huge number of scholarships to African students (50,000 scholarships for Africans to study in China for over three years, from 2018 to 2021). In his research Benjamin Mulvey found out that many Ugandan students felt discriminated while taking their degree in China, as they felt they were victims of "anti-African racism", leading to scepticism among graduates around China's role in Uganda.

This case is not isolated, and fosters consideration of general considerations on the ties between the capability of spreading soft power - i.e. being perceived as a soft power source- and the level of maturity of a state. Put it in other words, how can a state that does not grant the full civil right to its citizens, as China in the Hong Kong crisis, export civil, modern values as those associated to soft power?

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6. How to internationalise: the role of agencies

6.1 Are states aware that tertiary education is a soft power component?

So far, this work has accounted for two different, and often disconnected, phenomena: soft power on the one side, and internationalisation of higher education on the other, trying to highlight the connexions between the two, as in the case of university internationalisation indicators being used by some as KPIs for the definition of what soft power is (see chapter # 3).

Chapter # 5 showed that there are several active actors in the internationalisation process. They may be public or private. Though observers are customarily used to think about internationalisation as a practice run primarily by HEIs, and hence fully controlled by them, the reality shows a different picture. The scenario is crowded, and ranges from associations of HEIs, private companies, rectors' associations, the media, down to governmental or quasi-governmental agencies, or sub-agencies.

The focus of the second section of this research is on 'promotion agencies', entities which are to some extent knotted to the nation state where they operate in, with the purpose to promote internationally the higher education system of that state, primarily with the purpose to attract degree-seeking students.

These entities respond to a plethora of different denominations, be them council (in the U.K.), centre (in Germany), organisation (in the Netherlands), service (in Spain), education (in New Zealand and in the U.S.), institute (in Sweden), and so forth. To simplify, the keyword adopted here is 'agency', which sort of encompasses all the others. Also, quasi-synonymous such as "organisation", "entity", and "unit" will be used.

Thoughtfully account for links between soft power and international promotion of higher education requires understanding if central governments are aware of how internationalisation may, or may not, influence their country's soft power, and *consciously*

fund or man agencies to enhance that form of power. The attention will be focused on the degree of involvement of central governments in the running of agencies, either directly controlling them, or providing for funds, or setting the agenda- to reach their strategic goals. Ideally, all-encompassing research should then investigate national foreign policy's governmental guidelines, as well as issues such as the perceived role of international education in enhancing state revenues, and so on, and successively compare the findings with the action plans of promotion agencies. This, ideally. In practice, that kind of investigation goes far beyond the scope of the present work, which is limited to a tentative description of the interrelation between an agency (entity, organisation, division, etc.) and its home country, and the influence of the latter vs. the former's actions. As we will see, some countries *do* consider internationalisation of higher education as strategic, *also* because that process gains them international consideration, a stronger public image, and qualified workers for key industries. In other words, soft power (see chapter # 3).

To investigate such question, there is a need to understand how agencies are organised, what their output is, whether they are centrally funded or not, where they are located and why, checking if there is a ministerial presence in their boards of directors.

Providing a working definition for agencies is not easy and, to a certain point, even useless, as there are too many differences among the entities enhancing the internationalisation of higher education - even within a single state. Therefore, the lowest common denominator may be Webster's: "an establishment engaged in doing business for another". Mechanisms of delegation need then to be studied, and what "business" is intended by delegating entities, be them the states, HEIs, or other.

6.2 A proposed categorisation

A joint 2015 research by the American Council on Education (ACE) and the Center for Internationalization and Global Engagement (CIGE) exemplified four different categories of

agencies/organisations (ACE/CIGE: 2015). Though heavily relying on that work, the present research differentiates the three main categories proposed by ACE into 8 more specific ones, and adjourns the terminology where appropriate (e.g., EDUFI - the Finnish National Agency for Education).

6.2.1 National governmental agencies

These bodies are often constituted by the ministry of education (or other denominations) either in conjunction with the ministry of foreign affairs, and/or governmental bodies in charge of immigration, of trade, or of research. The keyword here is the formal control such bodies exert over the agency. Examples of such entities are:

- Austrade (Australia);
- The Swedish Institute (Sweden), though it is not exclusively devoted to the promotion of higher education, but to “promoting interest and trust in Sweden around the World”;
- EDUFI, the Finnish National Agency for Education (Finland), which is also devoted to the promotion of Finland’s tertiary education abroad, amongst other purposes.

6.2.2 Sub-agencies

These substantially lay at a governmental level, though they are “responsible for developing programs and operationalizing policy goals” (ACE/CIGE: 2015). In this case, as well, the key element is the degree of control central state *may* exert over agencies, either via the right to name members of standing supervising bodies, or via public funding, or both.

- Campus France (France), an agency which is borderline with the subsequent category (QGOs), but substantially well placed within the governmental sphere via direct state nomination of its Board of Directors (Campus France 2020);
- The China Scholarship Council (CSC), a non-profit organisation, but directly coordinated and funded by the ministry of Education.
- The Archimedes Foundation (Estonia), co-ordinates the "Study in Estonia" promotion agency.

6.2.3 Quasi-governmental organisations - QGOs

QGOs are supported by the government but managed privately: they have both public and private characteristics, not fitting neatly into either category. QGOs often are incorporated as a private, non-profit organization, but may be run by a board of directors that is composed of government officials or directors appointed by a governmental unit. QGOs may receive funds from the central and local governments, but are free, or even encouraged, to fundraise elsewhere.

- The British Council (UK) “also receives grant-in-aid funding from the UK Foreign and Commonwealth Office. This makes up around 15 per cent of our total income. It enables [it] to represent the UK’s long-term interest in countries where we cannot rely on earned income alone. (British Council: 2020);
- The NUFFIC (Netherlands), which despite being an independent, non-profit organisation, is heavily funded by the Dutch ministry of education, science and culture;
- The DAAD (Germany), which is a private, federally and state-funded, self-governing national agency.

6.2.4 Independent national organisations

The peculiarity of these organisations is that they both promote one single country's tertiary education, and they show no direct formal tie with that country government, in the sense that they are not overtly controlled by any branch of that state organisation. Some elements, though, suggest such ties may nonetheless exist.

Examples of this category are:

- The Turkish Universities Promotion Agency (TUPA);
- Uni-italia (Italy);
- Jasso (Japan).

6.2.5 Independent national associations

These entities are membership organisations, and hence overtly associations of universities, that gather to represent internationally their common interests and elect among their representatives their governing bodies. Formally, there are no direct links with the states they operate in. Though there is no doubt they contribute to the soft power enhancement of their states, there is no observable direct cause-effect mechanism in act.

Examples are:

- The Association of American Universities (AAU);
- The Japan Association of National Universities (JANU);
- The National Association of Australian University Colleges (NAAUC).

6.2.6 Regional university associations and networks

The membership is set at an institutional level, and their final aims depend upon the mission they themselves have adopted. Therefore, there seems to exist no direct state influence to them. Examples are:

- European University Association (UEA)
- Associations of Africans Universities (AAU)
- Associations of Universities of the Montevideo Group (AUGM)

6.2.7 Regional and national non-profit organisations with a specific focus on higher education internationalisation

Often organised alongside sub-groups at an individual level, these entities' membership can be mixed: higher ed professionals, university professors, government experts, media representatives, service providers. Usually, such bodies are not overly influenced by governmental action, which therefore cannot expect any soft power return.

Examples are:

- NAFSA, Association of International Educators, based in the US;
- EAIE, European Association of International Educators, based in Europe;
- APAIE, Asian Pacific Association of International Education, based in the Asian-Pacific area.

6.2.8 Regional governmental entities

Membership is at the country level, although the involvement of other bodies/agencies is contemplated. The interaction process is intergovernmental. Examples of such entities are:

- The European Union. The EU has long been active in the internationalisation process, i.e. patronising the most relevant and successful credit-mobility scheme of all times, Erasmus (now Erasmus Plus), or releasing the Horizon 2020 research scheme.

Also, the Bologna process, that paved the way to the European Higher Education Area (EHEA), was activated within the EU. The EU plays a formal and relevant role within other internationalisation actors, such as the European University Association (EUA), of which is member, and the European Network for Quality Assurance (EURASHE).

The EU's efforts overlap with those put forward by member states, by state agencies, and by single HEIs. Often, though not always, EU policies are directly run by state promotion agencies; in other cases, member states have developed ad hoc solutions to run European programs.

- Nordic Council. Its membership includes Denmark, Finland, Iceland, Norway, Sweden, the Faroe Islands, Greenland, and Aland (an autonomous region of Finland). It co-ordinates many (mainly) bilateral funding opportunities, though the most relevant here is Nordplus, the Nordic Council of Ministers' education and training programme, that consists of five sub-programmes aimed at different target groups from schooling to higher education. In particular, the Nordplus Higher Education Programme is a mobility and network programme in the higher education sector, on bachelor and master levels, for the Nordic and Baltic countries (Nordplus: 2020).
- OAS. The Organisation of American States is articulated in departments, one of which, the Department of Human Development, Education and Employment (DHDEE), supports the efforts of member states to increase access to quality education and life-long learning opportunities. The OAS Academic Scholarship Program, established in 1958, grants scholarships every year for the pursuit of Master's Degrees, Doctoral Degrees and Graduate Research leading to a university degree. The other pillar is PAEC (Partnerships Program for Education and Training), that offers other scholarship opportunities for academic studies with

the support of its partner institutions in the Americas and around the world (OAS: 2020).

6.3 A categorisation

The eight above-mentioned groupings are not exhaustive and cannot frame a phenomenon which is by definition constantly evolving. What follows is, therefore, a non-exhaustive list of criteria that can be used to further identify different patterns among entities themselves.

a. Level of governmental control

This has to do with the degree of overall governmental control over agencies': board member nomination rights by central or local government, state / local funding, the capability to dictate or influence the agency's policies. The more the government intervene, the less the agency's autonomy: from direct control of the agency, which is a branch of the central government, to no control altogether.



b. Funding model

The funding indicator relates to the agency's revenues, the scale ranging between 0% to 100% state funding. In the middle lay entities whose funding model is mixed.



c. Geographic spread

This indicator has to do with the geographical focus of the agency, which may range from a single state, up to the entire globe.



d. Mission

The agency may be focused on the internationalisation of the tertiary education system only, or this feature represents one of its most important features or, on the end, internationalisation may be one of the goals of the entity's mission.



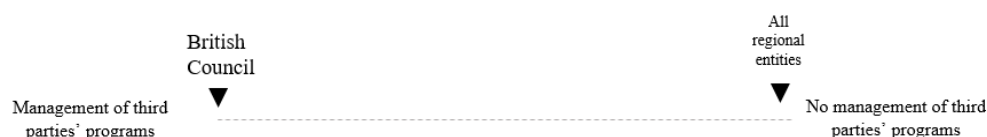
e. Membership

Membership may be restricted to states and, to the other end, open to individuals alone. In the middle, institutions such as HEIs may be the only allowed members. In some cases, those of 'pure' internationalisation agencies, this indicator does not apply (e.g., in the Campus France case). Some others have a mix representation model: Italy's Uni-italia, for example, host the representatives of its members within a scientific council.



f. Management of other agencies' programs

Some programs, noticeably Erasmus Plus, are only partially managed by the relevant directorate (in this case, EU's EACEA). Considering decentralised actions, such as Key Action 103 for instance, there are cases where these actions are managed by the same entity that is in charge of international promotion. Therefore, the suitable indicator here is an 'on / off' one.



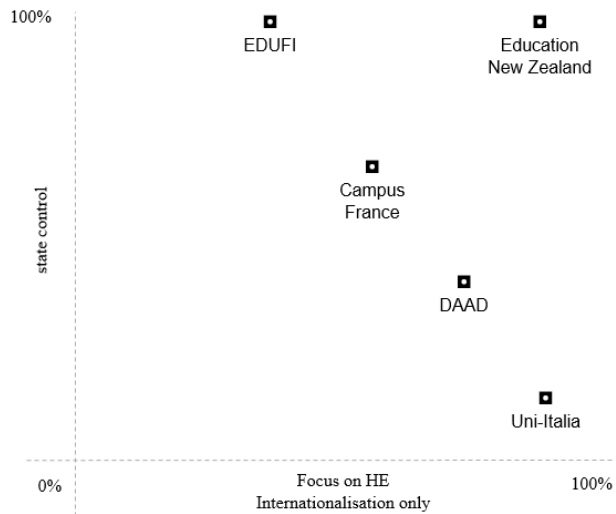
6.4 Interpolation

Where the operation bears sense, the interpolation of above-described a-f indicators offers further insight about the role of agencies in the promotion of internationalisation within a given geographical, political, or economic environment.

This paragraph will consider three such possible interpolations.

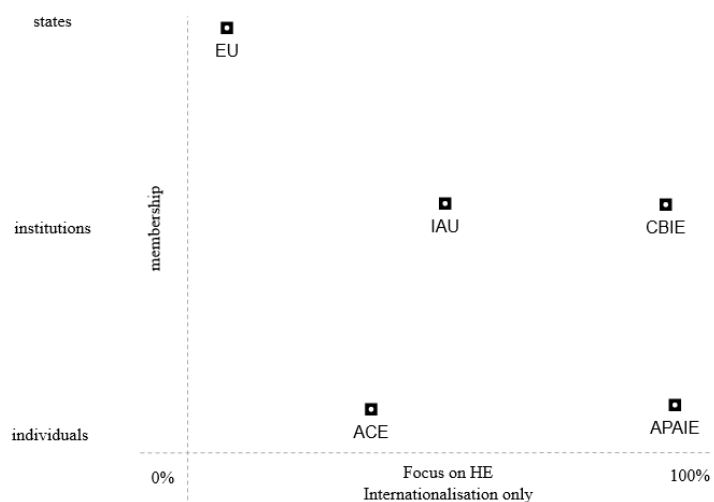
a. Governmental control vs. mission

As shown in the following graph, one possible interpolation of the general positioning of agencies is between the level of governmental control and the focus on internationalisation. Not all countries develop specific organisations for the international promotion of their tertiary sector, as well as not all of them exert a 100% control on them.



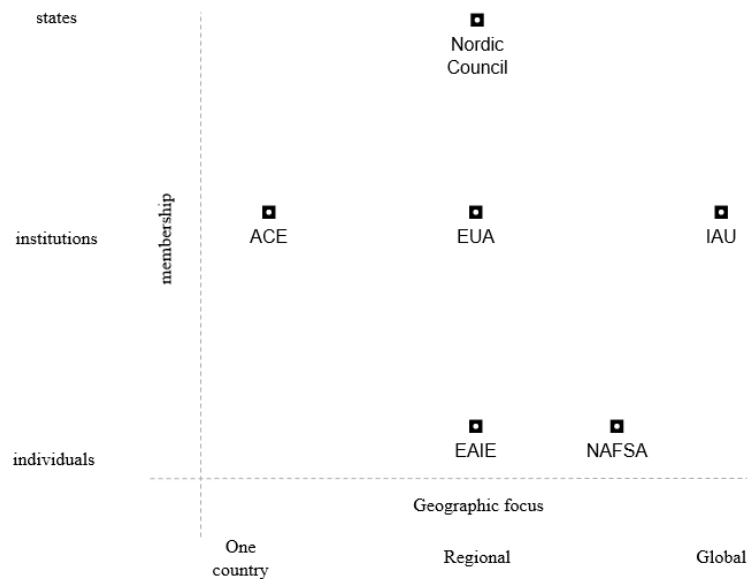
b. Membership vs. mission

Though it is self-evident that there is no grouping of states entirely devoted to the HE internationalisation goal, it may be interesting to evaluate the "positioning" of some entities within the membership/focus conceptual map. It emerges that there exists a group of universities that are exclusively devoted to internationalisation and others which cover that issue among other priorities. Same thing with international associations of individuals.



c. Membership vs. geographic focus

Membership vs. geographic focus allows evaluating entities that are somehow “missing” in the international arena, such as, for example, a truly global (i.e., non-regional) association of individuals devoted to internationalisation.



6.5 Which entities to evaluate

Given the scope of the present work, i.e. the connection between internationalisation of higher education, soft power, and the role of agencies/entities, some of the above-mentioned categories will not be considered, insomuch as they appear not to be representative of a national will or, better, of deliberate action to enhance a state's soft power.

The proposed scheme, therefore, provides a simplification of all considerations so far made in this chapter, highlighting the working definitions of the groups that will be analysed in depth.

N	Model	Degree of state control (approx.)	Model functional to state's soft power deployment (yes – some – no)	Relevance for the research (yes-no)
1	National governmental agencies	100%	Yes	Yes
2	Sub-agencies	51% - 99%	Yes	Yes
3	Quasi-governmental organisations - QGOs	25 – 50%	Yes	Yes
4	Independent national organisations	1 – 24%	Yes	Yes
5	Independent national associations	Limited – via HEI membership	Some	No
6	Regional university associations and networks	Limited – via HEI membership	Some	No
7	Regional and national non-profit organisations with specific focus internationalisation	Very limited – via HEI professionals	No	No
8	Regional Governmental entities	Very limited – via state membership	No	No

6.6 What is the agency's output?

On the one side, all agencies play a role in terms of fostering mutual understanding between the state they represent and other countries by promoting personal, professional, and institutional ties between private citizens and organizations, home and abroad. Agency's officials travelling the world in conferences and seminars; entities organising MOOCs or in-site training; organisations releasing white papers influencing governments: often underestimated, this broad role may be the most relevant.

On the other side, quantitatively measuring the real output of agencies' work may be difficult to measure, as outputs in this field are often a combined production manufactured by several different actors, the most important being universities themselves.

6.7 The internal dimension: agencies as think-tanks

Very often agencies provide insights for their national government, for institutions, or the HE industry. Provided-for studies may include country-reports, numerical analyses, surveys, trend analyses, and white papers. Some entities outsource these works to experts and academics, not necessarily same nationals to the agency itself. The best organised (and funded) agencies embed a specific research sector within their organigrams.

The following chart lists the agencies that will be studied in more depth in chapters #7 and #8, accounting for their role (if present) as a think-tank for their national tertiary education industry.

State	Agency	Model	Think-tank features	Source
Australia	Austrade	National Governmental Organisations	√√√√	https://www.austrade.gov.au/Australian/Education/Services/Market-Information-Package
Austria	OeAD	Independent National Organisations	√√√	https://oead.at/en/the-oead/downloads/
Chile	LearnChile	QGOs	-	
China	China Scholarship Council	Sub-agencies	-	
Estonia	Archimedes Foundation	Sub-agencies	-	
Finland	EDUFI	Sub-agencies	√√√	https://www.oph.fi/en/statistics-and-publications
France	Campus France	Sub-agencies	√√√√	https://www.campusfrance.org/en/documentary-resources
Germany	DAAD	Independent National Organisations	√√√	https://www.daad.de/en/the-daad/communication-publications/
India	EdCIL	QGO	-	
Italy	Uni-italia	Independent National Organisations	√√	http://www.uni-italia.it/it/analisi-e-dati
Japan	Jasso	Independent National Organisations	√√√√	https://www.jasso.go.jp/en/about/organization/publication/index.html
Netherlands	Nuffic	QGO	√√√√	https://www.nuffic.nl/en/publications/
Russian Federation	5.100	National Governmental Organisations	√	https://www.5top100.ru/en/documents/regulations/

Spain	SEPIE	Sub-agencies	√√	http://sepie.es/internacionalizacion/publicaciones.html
Sweden	Swedish Institute	National Governmental Organisations	√√	https://si.se/en/how-we-work/analyse-the-image-of-sweden/
South Korea	NIIED	National Governmental Organisations	-	
Taiwan	FICHET	QGO	√	https://www.fichet.org.tw/en/what-we-do/
Turkey	TUPA (YOK)	Independent National Organisations	√	https://www.yok.gov.tr/yayinlar/yayinlarimiz
UK	British Council	QGO	√√√√	https://www.britishcouncil.org/research-policy-insight/research-series
US	ECA (IIE)	National Governmental Organisations	√√√√	https://www.iie.org/en/Research-and-Insights/Open-Doors

6.8 Agencies as international drivers

Mapping agencies worldwide on the grounds accounted for above requires nonetheless three operational warnings. Firstly, not all states have established entities devoted to the internationalisation of their tertiary education sector. The presence of a developed university system does not *per se* imply the existence of an agency, as the Nigerian case shows (Daily Times: 2019). There are states and regions where HE internationalisation is becoming central in time, so this could be a too early snapshot for some of them.

The second factor has to do with relevance. There may be cases of agencies whose dimension and scope are not massive, but that nevertheless represent not-to-be-missed case studies, thanks to a particularly interesting combination of (scarce) resource and (excellent) results, such as in the case of Estonia. “The Strategy for the Internationalisation of Estonian Higher Education over the Years 2006-2015 has been considered by experts consulted informally for this report as “a classroom example of how things should be done and was indeed very effective (while it lasted)” (de Wit: 2019).

Thirdly, a state may be willing to pursue its soft power goals via the internationalisation of HE, but not through a specific agency as a vehicle to reach that goal. Other institutional means are available: for example, Italy maintains both an independent agency, Uni-italia,

that will be accounted for in chapter # 8, as well as a foreign ministry's international marketing action ("Study in Italy"). This raises questions, not only for the Italian case, about who is in charge to coordinate the international marketing strategy of a given country (British Council: 2019).

For each of the 4 categories illustrated in the following section, we will provide 5 examples of agencies fitting, or more or less fitting, the categories themselves. As usual, when operating such simplification, the capacity to go to greater detail is lost, and so is the possibility to see the greater picture, i.e. to fully evaluate the higher internationalisation strategy of a country within its broader foreign policy approach. As seen in the previous chapter, not always do agencies focus on the promotion of tertiary education only: most of the times they also perform tasks of international marketing *among* other duties, though some entities have that mission alone.

Again, the present study focuses more on how state presence is organised within a given entity, and to what extent does a given state fund that entity, rather than on policies. Where present, a special focus will be also given to ad hoc marketing initiatives put forward by such entities, seen as tools to enhance the foreign perception of the promoted state. i.e., its international image.

6.9 What dimensions to consider

The analysis carried out so far allows restricting the domain of what needs to be further researched to limited models of agencies/entities, i.e. only the four somehow influenced by ministerial or state decisions. These four kinds are:

- National governmental agencies;
- Sub-agencies;
- QGOs;
- Independent national organisations.

Such typologies will be analysed understanding several constituent features, as outlined above in section 6.2.9. To have a clearer picture, to these features we will add another three dimensions, the first two, descriptive, the third, numerical. The descriptive features are:

- a) Agency as a promotion vehicle, to describe to what extent the agency, or programs controlled by the agency, work as a vehicle intended, and funded, to promote that country tertiary education industry;
- b) Agency as soft power vehicle, to describe to what extent the agency, or programs controlled by the agency, functions as a catalyst for that country's soft power efforts.

The numerical feature derives from a 2019 British Council study (British Council: 2019): it is calculated interpolating 4 relevant KPIS, and accounts for the openness and mobility of a given university system:

c) Openness and mobility

Internationalisation strategy	Has the ministry of education (or equivalent) produced a detailed international higher education strategy (e.g. covering student mobility, research collaboration, development goals)?	0,2 points
Dedicated body	Is there a dedicated body (or bodies) promoting the internationalisation of higher education?	0,2 points
Overseas presence	Does the ministry of education or dedicated internationalisation body have a significant overseas presence, e.g. by way of overseas representative offices or participation in conferences, trade fairs and marketing events?	0,2 points
Bilateral Agreements	Over the past five years, has the government made efforts to sustain or increase the number of bilateral agreements/memoranda of understanding signed between itself and foreign education ministries on the topic of collaboration in higher education?	0,2 points

Data collection and monitoring of internationalisation	Does the government monitor and produce data on the internationalisation of its higher education system, e.g. by producing data on international student and faculty mobility, programme and provider mobility, and research collaboration?	0,2 points
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It follows that the maximum one state can score in the c) feature is 1. Where available, this research will utilise British Council's data. If not available, an *ad hoc* study will be done. Last, the score of the Softpower30 index (if present) will be reported ad point # 10. Hence, the reported scheme will be adopted in the last two chapters of the present work.

N	Level of analysis	Feature(s)
1	Mission	<ul style="list-style-type: none"> ▪ Whether the agency main objective is limited to higher education ▪ Whether the agency's main objective is limited to HE internationalisation
2	Level of governmental control	<ul style="list-style-type: none"> ▪ To what extent the central/local government is capable to exert control over the agency
3	Funding model	<ul style="list-style-type: none"> ▪ How the agency is funded
4	Geographical foci	<ul style="list-style-type: none"> ▪ What is the agency's sphere of action ▪ Whether the agency has got any peripheral office
5	Membership	<ul style="list-style-type: none"> ▪ Whether they are HEIs or individuals
6	Management of other agencies' programs	<ul style="list-style-type: none"> ▪ Whether the agency in its capability directly manages other entities' programs
7	Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ Whether the agency promotes the HE system internationally, and how
8	Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ Whether the state is aware the agency may act as a soft power vehicle
9	IHE strategy	<ul style="list-style-type: none"> ▪ 0 to 1 points ▪ <i>'British Council'</i> means BC score is reported ▪ <i>'Research'</i> means own research is reported
10	Softpower30	<ul style="list-style-type: none"> ▪ Score in 2019 Softpower30 index, if available

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7. National governmental and sub-agencies

In the proposed model, national governmental agencies and sub-agencies maintain close ties to their respective government, which in turn controls the entities as to all means are an integral component of the governmental administrative organisation. Though not automatically those governments invest a considerable amount of resources on the promotion of their tertiary education systems, surely they are aware of the phenomenon and likely to maintain a direct grip over that promotion, often, though not always, via specially-conceived programs (such as leadership programs or similar). Though accounting for the effectiveness of these models would require an in-depth analysis of the agencies' policies, which is out of the scope of the present work, it is nonetheless relevant to understand if national government perceive the strategic roles of their directly-funded agencies as catalysts of their soft power endeavours. And how they consequently organise, and fund, the service.

As shown below, most of the case-studies here analysed to show that that perception not only exists but is consciously nurtured by states themselves.

7.1 National governmental agencies

Genuine governmental agencies are directly controlled by the state via one of its ministries, usually the education, or the foreign affairs, or a combination of the two. In most cases, an agency (unit, bureau, institute, project) is in charge of international promotion of tertiary education; in some cases, there is more than one. Direct state control implies direct state interest over the internationalisation issue, together with the *will* to exploit international tertiary education business as a means to enhance soft power. Or, at least, full *awareness* by the state of the issue of tertiary education internationalisation, a consciousness that, as

we will see in chapter # 8, not always is present within the upper echelons of governments' organisations.

7.1.1 United States

Given the high density and global relevance of the US tertiary education system, to provide in few pages' a satisfactory account of the articulation of how the US promote their universities internationally would be unmanageable. In the US, internationalisation is embedded within the tertiary education system, not least because of the vehicular language of its higher education system, *per se* international. Therefore, as in the UK, Australia, and other English-speaking countries, HEIs did not and do not need to invest resources into the transformation of their courses in another vehicular language.

Parallel, each institution runs its own 'foreign policy' which in many cases can count on resources greater than those at disposal of many states: think about, for example, of an Ivy League institution, of its overall budget, and the resources that can be allocated to internationalisation.

That said, the US system is also highly centralised, depending - at least as far as main guidelines and funds are concerned- by the Federal government. Noticeably, three bodies are in charge for the promotion of the US HE system abroad: the Bureau of Education and Cultural Affairs (ECA), EducationUSA, and the Institute of International Education (IIE) – among other relevant players, public and private, associations (think about NAFSA), and service providers.

What is relevant here is that both ECA and Education USA are emanations of the Department of State, which is the US foreign ministry: this suggests that the promotion of tertiary education, in the United States, is pretty much a business that goes hand in hand with foreign policy, in turn, a sign that higher education is associated with the promotion of the States' image abroad, i.e. ultimately linked with its pursuit of international soft power.

(Very) broadly speaking, the ECA manages exchange programs, Education USA promotes the system internationally with the expressed intention to attract degree-seeking students, and the IIC acts as a think-tank, although many overlapping occur.

The U.S. Department of State's Bureau of Educational and Cultural Affairs (ECA) "works to build friendly, peaceful relations between the people of the United States and the people of other countries through academic, cultural, sports, and professional exchanges, as well as public-private partnerships" (ECA: 2020). The Bureau is part of the 'Public Diplomacy and Public Affairs' branch of the US Department of State. The head of the agency is nominated by the Senate, and the organisational structure The Bureau is made up of several offices, dealing with academic exchange, American spaces, citizen exchanges, language programs, global educational programs, international visitors, and policy evaluation, plus private sector exchange. It is not within the remit of this research to account for all the multitude of ECA's activities, that further range from exchange programs to leadership programs, from training to sport-related activities, involving more than 110 states every year (roughly, half of the globe). Significantly, the Bureau administers the Fulbright Program and the International Visitor Leadership Program, both somehow conceived to enhance the perception of the US abroad and hence its soft power: as an example, the website proudly reports that 37 Fulbright alumni have served as heads of state and government around the world (ECA: 2020), while 565 heads of government have participated in a Department of State's sponsored exchange program m. In other words, we have here a clear example of how foreign and educational policies can be closely interwoven to produce soft power results for the benefit of the sponsoring state. Seen from a more prosaic view, in 2015/2016 international students contributed with the bombastic sum of \$ 36 billion to the US economy. Amongst others, ECA runs two initiatives. The first, 'US Study Abroad', is finalised to sustain outgoing US citizens willing to pursue a degree, or to spend a study period, outside the country. In the words of Secretary of State Mike Pompeo "American Students studying

abroad play a key role as citizen ambassadors. They tell the American story and demonstrate American values and ideals to the entire world [...] They build understanding as unofficial ambassadors for our country, defining American values and debunking stereotypes (US Study Abroad: 2020)". E.g., a clearly-stated soft power proposition by the American Government Number 2.

The second initiative, 'EducationUSA', is a network of over 430 international student advising centres in more than 175 countries and territories, providing prospective students with information about visa policies, funding, and study opportunities (EducationUSA: 2020). Advising centres are located either c/o the local consulate/embassy, or c/o the Fulbright Commission, or in the sites hosting other cultural initiatives. There exists a geographical overlapping between the US diplomatic network and EducationUSA's, which even more explains the direct links existing under the State Department umbrella.

EducationUSA Serves the U.S. Higher Education Community supporting the international student recruitment and internationalization efforts of all accredited U.S. higher education institutions by:

- Organising school visits and college fairs, virtual and on location;
- Sharing information about foreign educational systems and scholarship programs;
- Connecting U.S. and foreign educational institutions.

Interestingly for the present research, EducationUSA runs a 'Leadership Institute', which aims to bring participants from select countries and world regions to the United States to increase their understanding of U.S. higher education, develop the tools necessary to build capacity within their systems and engage with the U.S. higher education sector. Groups of Ministries of Education or other government officials, college and university administrators,

and other qualified participants annually participate in Leadership Institutes focusing on a range of timely and critical topics (EducationUSA: 2020).

Figures on budget, personnel, and expenses are not easy to mine, though sources report the sum of \$ 12,5 million (€ 11,5 million) as yearly budget EducationUSA employs solely for international marketing purposes (British Council: 2019).

Such initiatives heavily rely on numerical analyses and relevant data: every year, US embassies, the Departments of State, Commerce, and Education, and US colleges and universities use 'Open Doors' data to inform policy decisions about educational exchanges, trade in educational services and study abroad activity (IIE: 2019). Open Doors is a comprehensive information resource on international students and scholars studying or teaching at higher education institutions in the United States, and US students studying abroad for academic credit at their home colleges or universities. The initiative is sponsored by the U.S. Department of State with funding provided by the U.S. Government and supported in its implementation by the Institute of International Education (IIE), which is the third main pillar of the US HE international promotion strategy.

The IIE governs more than 200+ programs serving more than 27,000 people from 185 nations each year. The focal point of the programs includes: Fellowship and Scholarship Management, Higher Education Institutional Development, Emergency Student and Scholar Assistance, Leadership Development, and International Development (IIE: 2020).

IIE conducts applied research and policy analysis in the field of international student mobility. Through research and program evaluations, IIE is provides advising and counselling on international education and opportunities abroad. IIE's publications, reports and policy papers also provide resources for students and advisers, domestic and international governmental agencies, non-governmental organizations and foundations. Some of IIE's research projects include: Open Doors, Project Atlas (a comprehensive mapping of international students) and the Global Education Research Reports.

Founded in 1919, the IIE is a charitable organisation that in 2016 could count on revenues in the order of \$ 592 million (€ 540 million), in part fundraised, in part supported from a governmental unit or the general public (Charity Navigator: 2020), its mission is "to help people and organizations leverage the power of international education to thrive in today's interconnected world" (IIE: 2020).

The three mentioned structures account for much of the effort the US is capable to produce in terms of international promotion of its tertiary education industry, though an important part is played by HEIs, too. Combined, these actors contribute in a significant way to the enhancement of the country's soft power, boosting its international image of a qualified provider of academic studies and services.

Mission	<ul style="list-style-type: none"> ▪ ECA's main focus is not higher education; EducationUSA and IIE focus is higher education ▪ The agency's main objective is not limited to HE internationalisation, EducationUSA and IIE's main objective is HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ Comprehensive in the case of ECA and EducationUSA, that work underneath the State Department
Funding model	<ul style="list-style-type: none"> ▪ State provisions
Geographical foci	<ul style="list-style-type: none"> ▪ Website available in English only ▪ Social media extensively made use of ▪ Activities are run substantially everywhere in the World and rely on the capillary US diplomatic network
Membership	<ul style="list-style-type: none"> ▪ Not relevant
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ Not present
Personnel	<ul style="list-style-type: none"> ▪ N/A
Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ EducationUSA is in charge of the promotion of the US tertiary education system in the world ▪ It does so organising different typologies of initiatives, including fairs and online events. Participates to all major international conferences
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ Soft Power elements are immediately detachable in ECA's website, where a statement by the State Secretary reminds us of the centrality of international education in US politics ▪ Some programs, such as the Leadership Program, are conceived as soft power instruments

	<ul style="list-style-type: none"> IIE acts as a think-tank, noticeably via the Project Atlas and other initiatives, but contributes via the management of programs and initiative to consolidate the US soft power globally
IHE strategy	<ul style="list-style-type: none"> 0.6 (British Council)
Softpower30	<ul style="list-style-type: none"> 5th (2019)

7.1.2 South Korea – Study in Korea / NIIED

The international promotion of the South Korean tertiary education system relies on the “Study in Korea” initiative (Study in Korea: 2020) overtly “run by the Korean Government”. The website shows how SiK is coordinated by the National Institute for International Education (NIIED), which operates under the umbrella of the ministry of Education, the controlling body of the Institute.

The “National Institute for International Education (NIIED) is a “Responsible Administrative Agency” under the Ministry of Education. The Institute is working for internationalization of Korean education, intending to develop and cultivate competitive human resources in the Global Era” (NIIED: 2020). While the institute’s mission is “to be a worldwide specialized institute of international education cooperation”, its tasks include the attraction and support of international students, the operation of Global Korea Scholarship program, to administer TOPIK (the test of proficiency in Korean), to promote international education exchange and cooperation, to operate programs for overseas Koreans, and to promote and support foreign language education. In particular, “The Global Korea Scholarship (GKS) is designed to provide international students with opportunities to study at higher education institutions in Korea for undergraduate and graduate studies, which will enhance international education exchange and deepen mutual friendship between Korea and participating countries”.

“Study in Korea” is a marketing page, translated in 12 languages, highlighting the above-mentioned features, and acting as a service platform for HEIs interested into internationalisation.

South Korea consequently considers the internationalisation of higher education as a pillar of its foreign policy, and hence of its soft power deployment: the need to “promote a proper understanding of Korea as well as to garner support and awareness of its foreign policy” and the investment on scholarship for foreign students reflects Korea’s ambition to act as a local educational power.

Further, the specific geographical focus is given to some of neighbouring super-powers (Japan, Russia, China), answering to the need to align tertiary education international policy to South Korea foreign policy priorities (Asanist: 2020).

Mission	<ul style="list-style-type: none"> ▪ The main focus is on higher education ▪ The agency’s main objective is limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ N/A, though the website reportedly states “run by the Korean Government”
Funding model	<ul style="list-style-type: none"> ▪ N/A
Geographical foci	<ul style="list-style-type: none"> ▪ Website available in 12 languages, which reflect NIIED’s geographical foci ▪ Special attention is given to: Russia, China, and Japan, whereas the good relations with North Korea are also relevant
Membership	<ul style="list-style-type: none"> ▪ Not relevant
Management of other agencies’ programs	<ul style="list-style-type: none"> ▪ Not present
Personnel	<ul style="list-style-type: none"> ▪ N/A
Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ Study in Korea manages scholarships for international students, co-ordinates fair and on line fairs, and offers information about Korean HEIs
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ The attraction of degree-seeking students ▪ The teaching of Korean as a foreign language ▪ Co-ordination of scholarships ▪ “the Korean government will strive to promote a proper understanding of Korea as well as to garner support and awareness of its foreign policy”
IHE strategy	<ul style="list-style-type: none"> ▪ 0.4 (Research)
Softpower30	<ul style="list-style-type: none"> ▪ 19th (2019)

7.1.3 Russian Federation - Russia.study / 5.100

Though there exists an online broadcasting service (Russia.study) that resembles all the features of a HE promotion agency, there is no doubt that, in the case of Russia, the entity that needs to be mapped here is the 5.100 Russian Academic Excellence Project, which operates under the direct control of Ministry of Science and Higher Education of the Russian Federation. Though the 'Russia.study' portal claims to be the "official website for foreign nationals enrollment for study in Russian Federation" (Russia.study: 2020), it is managed by the "Agency for Cooperation in Education Limited Liability Company" (in Russian "ООО"), a legal entity with its capital divided into shares: thus, a private company. Russia.study is translated in 10 languages, which –albeit broadly- reflect Russia's priorities in foreign policy, and offers very detailed information about academic courses, university options, enrollment procedures, and scholarships. Overall, the portal is designed around the need of an international prospective foreign student.

On the other end, the 5.100 scheme reflects more directly Russia's ambitions to become an international key player in the field of higher education, and hence HE internationalisation: "The Russian Academic Excellence Project wants to tap into the full academic and research potential of Russian universities while bolstering their positions in the global education market" (5top100: 2020). In 2013 the Russian Government announced a program aiming at further develop some of the leading universities, establishing a "Council on Competitiveness Enhancement of Leading Russian Universities". At the time of writing this work, the Council's chairperson is Tatyana Golikova, Deputy Prime Minister of the Russian Federation, though internationally-recognised scholars, as Philip G. Altbach (Founding Director of the Boston College Center for International Higher Education), also sit in the Council.

The Project's general aim is to increase the competitiveness of the Russian HE sector globally, i.e. enhancing the position in rankings of 21 selected institutions (hence the

program's name). To reach this goal, the Council established sub-projects such as, for example, "to have at least 10% international professors amongst the staff and no less than 15% international students", which is a purely HE internationalisation goal. The project budget for 2013-2017 totalled 60.5 billion roubles (roughly € 700 million).

In 2017, the then Prime Minister Dmitry Medvedev declared that developing education exports is "a serious national challenge for our country" and an "increasing national priority" (The Pie: 2017), stating that Russia was ready to further invest 5 billion roubles (roughly € 60 million) for the period 2017 – 2025 for the attraction of foreign students *alone*, as recruiting international students "entails additional benefits including improved intercultural communication and contacts for domestic students and the introduction to the labour market of skilled foreign talent.". I.e., a typical soft power component.

Mention also should be made to the Rossotrudnichestvo (Federal Agency for the Commonwealth of Independent States, Compatriots Living Abroad and International Humanitarian Cooperation, under the jurisdiction of the Russian Ministry of Foreign Affairs, established in 2008). It is a government-controlled agency constituted to foster international student recruitment by the Russian universities, primarily from the countries of Central Asia and the Caucasus, and primarily employing an unconventional use of scholarships and grants (Fominykh: 2016). The action eventually resulted in an increased number of government-provided scholarship recipients. By 2015, the CIS citizens constitute more than half of all full-time international students in Russia.

It can be concluded that Russia maintains a double standard: an excellency initiative (5.100), with direct state investment and control, established to enhance the global standard of a restricted number of institutions, and a general promotion agency (Russia.study), incorporated under private company law, whose ties with the central government are less clear. The Rossotrudnichestvo is mainly based upon the use of scholarships as means to

attract international students, rather than a promotion agency, though the results in terms of students enrolled, and soft power dissemination, look impressive.

At an international level, though, 5.100 is today widely known, and recognised, as Russia's real internationalisation agency, not least for its constant presence c/o the major internationalisation events (NAFSA, EAIE, APAIE, etc.).

Mission	<ul style="list-style-type: none"> ▪ The main focus is on higher education ▪ The agency's main objective is limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ It is clear that the President / Prima minister nominates the agency's top management
Funding model	<ul style="list-style-type: none"> ▪ The initiative's funds come from the state
Geographical foci	<ul style="list-style-type: none"> ▪ No specific countries are targeted
Membership	<ul style="list-style-type: none"> ▪ Not relevant
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ No
Personnel	<ul style="list-style-type: none"> ▪ N/A
Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ Not immediately perceivable ▪ 5.100 is regularly present at the major international industry conferences
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ In the words of top Russian politicians, 5.100 is conceived as a soft power instrument
IHE strategy	<ul style="list-style-type: none"> ▪ 0.6 (British Council)
Softpower30	<ul style="list-style-type: none"> ▪ 30th (2019)

7.1.4 Australia: Austrade / Study in Australia

Australia is one the World's greatest exporter of higher education, and consequently one of the larger importers of international students, whose expenses represent in turn the third major source of the country's GDP (Australian Government: 2015).

True, the Spring 2020 coronavirus outbreak has affected the industry a great deal, with reportedly up to 21,000 jobs at stake: Australian universities has estimated the overall declines in revenue at between \$3bn and \$4.6bn (The Guardian: 2020). This outcome descends from the high dependence of Australian universities on international students, and on Chinese students in particular: in a sense, we can sustain that Australian universities are in this respects paying their exposure to international student intakes, and hence from their success.

This duly accounted for, the Australian model is worth reviewing, as the promotion of the system can rely on full governmental support, and lays at the very centre of a conscious, explicitly-defined branding initiative led by government itself.

The promotion of Australia universities is managed directly by Austrade, the Australian Trade and Investment Commission, Government's international trade promotion and investment attraction agency. The entity operates as a statutory agency within the portfolio of Foreign Affairs and Trade, with Austrade's Chief Executive Officer reporting directly to the Minister for Trade, Tourism and Investment (Austrade: 2020).

Austrade is responsible for the international marketing and promotion of Australian education and training. Through an extensive international network, Austrade gathers information internationally and eventually disseminates to the Australian education sector, to assist providers to make informed decisions and develop strategies to develop international relationships and business. A key priority is the development of transnational education opportunities in growth and emerging markets, especially in Asia. Austrade has worked with the international education sector to develop long-term market development roadmap to enable the sustainable growth of the sector into the future.

Also, Austrade fully acts as industry's think-tank, maintaining a robust Market Information Package (MIP) to provide market intelligence, analysis, opportunities and data to support Australia's international education and training sector. Information includes:

- Business intelligence and market insights;
- Opportunities to connect with international customers sourced by in-market Austrade staff;
- Over 15 years of international student data, including tools to model, analyse and compare markets;
- Objective data and economic indicators depicting growth potential, the scale of opportunity and ease of access to a market.

As far as target countries are concerned, the agency publishes an updated "Market profiles" page, to "help you research, discover opportunities and learn about recent developments by the specific market" (Austrade: 2020). The page contains detailed info-sheet of some 56 different countries, which in turn arguably represent the nation's geographical marketing foci, as far as tertiary education is concerned.

Brand promotion is taken very seriously by Austrade, to the point that the agency set up a Nation Brand Advisory Council and a Brand Expert Working Group (Austrade: 2020), in charge "to market the entire country – the twenty-five million people in Australia, every state and every territory, and every corporation" (Austrade: 2020). Australia's brand is developed in co-operation with businesses and industry.

Austrade makes no mystery why branding is for them important, nor of the ties between international education and economics: "in the world today, there is intense competition for trade, investment, tourism, talent and influence. [...] A unified and strategic representation of Australia's capabilities will improve our global competitiveness, leading to more international people choosing Australia when buying, investing, *studying* and travelling" (Austrade: 2020).

Last, Austrade highlights the soft power features embedded in its brand promotion initiative: “Nation brands are measured through several attributes. These include a nation's physical beauty, business environment, contributions to the global culture, technological standing, and the quality of its workforce. A nation's overall rank is a combination of 'harder' and 'softer' attributes, for example, technology and physical beauty” (Austrade: 2020). In the same webpage, branding and soft-power country ranking, included the Softpower30, are listed.

The hands-on international marketing part is left to the “Study in Australia” initiative, which is directly managed by Austrade “and contains links to other official Federal and State Government departments and authorities” (Study in Australia: 2020). The website is a classic portal intended to offer prospective students the most updated information about their studies in Australia, including information about immigration policies, scholarships and grants, and single universities. On the other hand, though, the portal does not account for the intense marketing activity the SiA carries on globally: for example, a SiA stand is being organised in the all the major HEI conferences, such as NAFSA, EAIE, and APAIE. Further, SiA seems to be present with dedicated branch offices/activities c/o the capillary Australian diplomatic network. Also, it should be taken into account that there exists some region-centred "study in" initiatives (such for example Study Canberra and Study Queensland) that sort of complete and further implement Australia international marketing efforts.

SiA website is translated in 12 different languages, broadly accounting for Australia's geographic neighbours (e.g., Chinese, Japanese, Indonesian, Vietnamese and Korean); social media presence is highly developed, with SiA pages being maintained in Weibo and WeChat, besides the more traditional social media providers. Not much else is available about SiA, especially for what regards personnel, budget, and branch offices, though the figures available for Austrade, and the specific focus on national brand, give a clear-cut account of Australia's national interests and efforts in the field.

Mission	<ul style="list-style-type: none"> ▪ The main focus is not higher education, but international trade and economic exchanges ▪ The agency's main objective is not limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ The organisation official operates "under" the ministry of Foreign Affairs, and it is embedded within its website ▪ It is not evident how the ministry nominates the agency's top management, and if so does
Funding model	<ul style="list-style-type: none"> ▪ The agency is funded by the Australian Government ▪ The agency also fundraises some of its revenues
Geographical foci	<ul style="list-style-type: none"> ▪ 56 specific countries are targeted ▪ Website translated into 12 languages ▪ Branch offices seemingly present c/o all embassies, consulates
Membership	<ul style="list-style-type: none"> ▪ Not relevant
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ No
Personnel	<ul style="list-style-type: none"> ▪ 1,028 ▪ of whom dedicated to higher education promotion: N/A
Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ Austrade is in charge of international promotion of the system ▪ Austrade organises international fairs and roadshows
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ Austrade maintains a Council in charge to supervise and enhance Australia's branding efforts ▪ Austrade looks very aware of intersections existing among internationalisation of higher education, national branding, and soft power enhancement
IHE strategy	<ul style="list-style-type: none"> ▪ 1 (Research)
Softpower30	<ul style="list-style-type: none"> ▪ 9 (2019)

7.1.5 Sweden: Swedish Institute / Study in Sweden

“The Swedish Institute is a public agency that promotes interest and trust in Sweden around the world. We work in the fields of culture, education, science and business to strengthen international relations and development” (Swedish Institute: 2020). The main feature, and peculiarity, of the SI is the strong link between international communication and internationalisation of higher communication that features its endeavours. The umbrella program is denominated ‘Image of Sweden strategy’, a joint scheme presenting Sweden

and Swedish experience to a variety of target groups. SI develops the policy, together with the Ministry for Foreign Affairs, the Ministry of Enterprise and Innovation, the Ministry of Culture, Business Sweden and VisitSweden.

SI is co-ordinated by an Advisory Council made up of 9 members, among which two members of Parliament, a representative of the Swedish Institute of International Affairs, and a representative of a university. The agency is financed mainly through the state budget, with approximately 470 million SEK (€ 42,5 million) government funds in four areas: international cooperation, international assistance, education and university research and business. Of these, SEK 294 million (€ 26,5 million) are grants and scholarships, and approximately two-thirds of this amount is financed by the Swedish aid budget.

SI's main aim is to foster trust in and cooperation with Sweden in the world by acting as an expert organisation for public diplomacy (described in the website as "understanding, informing, influencing and developing relations with people in other countries to create influence, closer relationships or change"). Thus, the Swedish authorities found the way to have diplomacy and higher education meet; practically, the purpose is reached leveraging on four clusters:

- Monitoring and analysing Sweden's relevance in other countries;
- Sharing narratives about Sweden, Swedish skills and experiences;
- Strengthening talents, opinion-formers and decision-makers in other countries;
- Developing and maintaining networks for lasting international relations;

Higher education is thus encompassed among national interests, communication of Swedish narrative, and –most important- the monitoring of what others think about the country. In two words, soft power.

To this respect, the agency's "Leadership programmes" are a perfect example of how international education, national branding and foreign policy can go well in hand together

(Swedish Institute: 2020): “Common to all SI leadership programmes is that they pass on knowledge and skills in seeking to strengthen leadership based on key issues of Swedish foreign policy, centring on human rights and sustainable development”.

Interested students are invited to apply for a leadership programme “if you find your country of citizenship in the drop-down list”, meaning there exist a well-conceived list of target countries. In practice, the Swedish Institute lists different programs (e.g., the Baltic Leadership on Energy Efficiency) where only citizens of selected countries can apply. In this way, Sweden smartly couples its geopolitical priorities with its cultural (or industrial) clusters. Broadly speaking, the geographical foci include: the Baltic countries, the Western Balkans, Africa, Asia, and Northern Europe.

The almost complete match between SI's policies and the country is recognisable from the ministry of Foreign Affairs' website, where the visitor is informed that policy focus is on democracy and human rights, foreign and security policy, international development cooperation, and trade and promotion of Sweden (Government of Sweden: 2020).

The website “Study in Sweden” is a classic portal reporting information and news conceived for international prospect students interested in Sweden. Studyinsweden.se is built and maintained by the Swedish Institute, a public agency tasked with promoting Sweden abroad (Study in Sweden: 2020). The website is maintained in 5 languages, noticeably in Arabic, Japanese, and Korean besides English. All 39 HEIs are enlisted, though there is no mention about international activities such as participation to fairs and conferences. The website, thus, appears to be just an informative page provided by the Swedish Institute.

A historic global powerhouse on human rights (Carlson-Rainer: 2017), Sweden has organised her action towards the internationalisation of her higher education system exactly alongside the main guidelines of her foreign policy. In doing so, the Country has privileged an approach based (also) upon communication and upon influencing its neighbours and stakeholders about the assertiveness, modernity, respect of the environment, and vision of

her policy. The choice to exert direct government control tertiary education’s international marketing and communication, for example generously financing recruitment-related policies, clearly shows how these issues are at the centre of the political, and academic, debate.

Mission	<ul style="list-style-type: none"> ▪ The main focus is on higher education ▪ The agency’s main objective is not limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ The organisation is a governmental agency, working closely with the ministry of Foreign Affairs ▪ It is not evident how the ministry nominates the agency’s top management, and if so does ▪ MPs and other top officials sit in SI’s Advisory Council
Funding model	<ul style="list-style-type: none"> ▪ The agency’s funds come from the state
Geographical foci	<ul style="list-style-type: none"> ▪ Specific areas are targeted the Baltic countries, the Western Balkans, Africa, Asia, and Northern Europe ▪ One office in Paris
Membership	<ul style="list-style-type: none"> ▪ Not relevant
Management of other agencies’ programs	<ul style="list-style-type: none"> ▪ N/A
Personnel	<ul style="list-style-type: none"> ▪ 140
Agency as promotion vehicle	<ul style="list-style-type: none"> ▪ SI promotes the university system organising festivals, challenges, and exhibitions ▪ SI manages scholarships, funds, grants, and a leadership program
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ SI works alongside the ministry of Foreign Affairs to promote ▪ SI is in charge of “Analysing the image of Sweden” ▪ Leadership program intended as a soft power tool
IHE strategy	<ul style="list-style-type: none"> ▪ 0.4 (Research)
Softpower30	<ul style="list-style-type: none"> ▪ 4 (2019)

7.2 Sub-agencies

Sub-agencies are embedded at a governmental level, though they are “responsible for developing programs and operationalizing policy goals” (ACE/CIGE: 2015). The key element is the degree of control central state may exert over agencies, either via the right to

name members of standing supervising bodies, or via public funding, or both. Control over the agency's agenda and policies is also another relevant factor, so is the extent to which sponsoring states assign a soft power sort-of mission to the agencies themselves, an element that sometimes is overt, sometimes entrenched within the agency's mission and performances.

7.2.1 France - Campus France

“Campus France is a public institution in charge of promoting French higher education abroad and welcoming foreign students and researchers to France. It encourages international mobility and manages scholarship programmes and the alumni network. CF provides foreign students and researchers with the tools to learn more about the French institutes of higher education and find what they are looking for. Campus France also assists French institutes of higher education and research bodies in their international development strategy” (Campus France: 2020).

With 80 websites in 30 languages, 358 affiliated institutions, 30.000 scholarships managed, a robust on-line presence and activity, a dynamic research unit that releases 20+ publications per year, a 720-strong staff, and 250 local offices in more than 120 countries, CF is a superpower among agencies, to the point that its role as the promoter of the French higher education system is but one of the many roles the agency simultaneously plays (Campus France: 2019).

Established in 2010, CF is a public enterprise of an industrial and commercial nature. The agency's board of directors counts 29 members, 13 of which are expressed by relevant ministries. Five reps are designated of the Minister of Foreign Affairs, including the director of mobility and attractiveness policy. Overt political co-ordination of the company is confirmed by the presence in the board of two senators and two deputies.

CF maintains a network consisting of:

- 220 employees spread around France, in Paris and the 5 regional delegations;
- 256 offices located in 126 countries within the French diplomatic network;
- some 370 French institutions and research organisations united in the 'Forum Campus France'.

The agency carries out all its actions in close consultation with the higher education institutions and their representative conferences: the conference of university presidents (CPU), the conference of the grandes écoles (CGE) and the conference of directors of French engineering schools (CDEFI).

It does not make much sense to try to frame France's target countries, as, basically, CF performances on a truly global scale. French recruitment initiatives, organised also through a vast-scale fair calendar, particularly target newly emerging markets and countries with large potential student populations (Nuffic: 2012). In particular, the agency organises tailor-made programs with target countries often, though not always, placed in the francophone part of the World, though special attention is given to Africa, to Asia, and the Americas (Campus France: 2020).

CF also runs an 'Etudes an France' platform, set up to make prospective students' enrolment procedures in a French higher-ed program easier. The procedure is completely dematerialized and helps students following the right procedures up until the visa request.

The attraction of international students is today *the* cornerstone of French soft power policy, and CF lays at the very centre of this process, to the point that President Emmanuel Macron himself has intervened in the debate explaining the need, for his country, to further attract international students (Campus France: 2019). Even more explicitly, French Prime Minister Edouard Philippe launched a *national strategy for soft power* directed to "significantly

increase the number of joint degrees and agreements between institutions to boost international mobility of students and reach 500,000 students in mobility in France by 2027”.

Philippe detailed its three main cornerstones:

- Better welcome conditions. The first key point of the national strategy for soft power directed to international students relies on the improvement of welcome conditions, and so as early as the very first contact with the French government services;
- Ensure better financial equity, by wisely using financial aid and scholarships;
- International soft power (sic.). “The government wants to foster the implementation of French institutions abroad [...] The government decided to support the scouting processes from French institutions, through the creation of a 5 million Euros seed fund from the Ministry of Europe and Foreign Affairs [as well as] the implementation of projects among the most solid and relevant, through the creation of a 20 million Euros/year support fund, starting in 2020.

As a nation, France strongly believes that there exists a link between soft power enhancement, the internationalisation of higher education, and the recruitment of international studies, to the point that the top two figures in the republic committed themselves (and the State as well) to further invest to that end. CF, an agency which is broadly controlled by the state, though retaining operative autonomy, lays at the centre of the project.

Mission	<ul style="list-style-type: none"> ▪ The main focus is on higher education ▪ The agency's main objective is limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ CF has two “supervising” ministries: the ministry of Foreign Affairs, and the ministry of Higher Education for research and Innovation

	<ul style="list-style-type: none"> ▪ The Board of Directors is composed of deputies and senators, representatives of ministries, a conference of institutions, mayors and regions of France, CNOUS (Centre national des oeuvres universitaires et scolaires)
Funding model	<ul style="list-style-type: none"> ▪ Budget: € 130 M (2017) ▪ Funding mechanisms are not clear, although arguably a mixture of public funds (the great majority) and other revenues (the minority) apply to the French model
Geographical foci	<ul style="list-style-type: none"> ▪ CF covers a wide geographical area (120 countries), mainly, though not only, in francophone countries. Nonetheless, the agency's focus is the whole World ▪ 120 local offices
Membership	<ul style="list-style-type: none"> ▪ CF maintains a "CF Forum", where HEIs are members of right if they belong to the major national HEI associations
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ In 2016, CF managed the stays of 20,000 foreign scholarship students. ▪ CF implements scholarship programmes for many institutions including: <ul style="list-style-type: none"> ✓ the Ministry of Europe and Foreign Affairs; ✓ the Ministry of Higher Education and Innovation; ✓ French regional authorities; ✓ foreign governments; ✓ international organisations; ✓ French and foreign companies.
Personnel	<ul style="list-style-type: none"> ▪ 200 staff members in France ▪ 500 staff members worldwide ▪ 700 staff member overall
Agency as promotion vehicle	<p>CF active in:</p> <ul style="list-style-type: none"> ▪ promoting the recruitment of foreign students and young researchers by French institutes of higher education and research bodies; ▪ improving the reception of foreign students in France; ▪ making international mobility easier for French students; ▪ fairs / student presentations
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ CF maintains branch offices in many foreign countries, noticeably placed c/o embassies and consulates ▪ CF facilitates the first steps toward a career for graduates of the French system of higher education; ▪ CF encourages academic cooperation and partnerships between French and foreign educational institutes; ▪ CF produces 20 publications/year on international mobility, including country data-sheet and regional trends, acting as a governmental think-tank
IHE strategy	<ul style="list-style-type: none"> ▪ 1 (British Council)
Softpower30	<ul style="list-style-type: none"> ▪ 1st (2019)

7.2.2 Estonia - Archimedes Foundation / Study in Estonia

Estonia has developed a comprehensive 'Strategy for the Internationalisation of Estonian Higher Education over the Years 2006-2015' (Ministry of Education and Research, 2007). The main objectives are to "improve the competitiveness of Estonian higher education in the region" and make the tertiary education system "more open and visible" by creating "a legal and institutional environment that supports internationalization in all its aspects".

In this context, the Archimedes Foundation was established as an independent body by the Estonian government in 1997 to coordinate and implement different international and national programmes and projects in the field of training, education, research, technological development and innovation (Archimedes Foundation: 2020).

AF is an umbrella organisation operating under the direct supervision of the education and research ministries, and encompassing several activities which are relevant in the field of higher education, being the Estonian National Contact Point Organisation for EU Seventh Research Framework Programme, the research evaluation organisation, and Academic Recognition Information Centre (Estonian ENIC/NARIC).

AF's activities include the "Study in Estonia" project, which is funded by the government via EU structural funds and is in charge of the promotion of internationalisation of the higher education sector in the Baltic country. It acts in co-operation with HEIs offering programs in English (Loonurm: 2020). SiE is something more than a classic international promotion portal, as it accounts for the contribution, in terms of visibility, joint efforts, and marketing, of all Estonian HEIs that maintain study programs in English (Study in Estonia: 2020). SiE also maintains a lively blog, an updated calendar, and a 'student ambassador' program intended to make current students meet with prospective ones.

Mission	<ul style="list-style-type: none"> ▪ The main focus is higher education (Archimedes Foundation) ▪ The agency's main objective is not limited to HE internationalisation (Study in Estonia)
Level of governmental control	<ul style="list-style-type: none"> ▪ AF's Supervisory Board is nominated by 4/5 by the Estonian Government, the remainder post being occupied by a rector ▪ Study in Estonia is a governmental project
Funding model	<ul style="list-style-type: none"> ▪ Study in Estonia is mainly funded through EU structural funds ▪ Budget in the order of € 300 K / year
Geographical foci	<ul style="list-style-type: none"> ▪ Limited scope, given the limited diplomatic network of the Estonian government ▪ No branch offices
Membership	<ul style="list-style-type: none"> ▪ HIE membership ▪ SiE serving as a vehicle of internationalisation for member HEIs
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ No
Personnel	<ul style="list-style-type: none"> ▪ SiE: 4 ▪ AF: 100
Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ SiE promotes country HE in fairs, event, conferences
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ The attraction of degree-seeking students ▪ Co-ordination of scholarships ▪ SiE active in establishing country priorities
IHE strategy	<ul style="list-style-type: none"> ▪ 0.8 (Research)
Softpower30	<ul style="list-style-type: none"> ▪ Not ranked

7.2.3 China – China Scholarship Council / Campus China

The Chinese Ministry of Education's effort to attract more foreign students to China is increasingly remarkable, for example by advertising Chinese universities abroad, "creating new scholarship programs for students from the developing world, loosening visa policies for foreign students, and increasing spending to lure elite foreign scholars from the West to teach in China, thereby upgrading China's university system" (Kurlantzick: 2007). The cornerstone of China's policy is the China Scholarship Council, which was set up in 1996 as a non-profit institution with legal person status affiliated with the ministry of Education (Yao:

2004); or, as some scholars have recently underlined, “directly under the ministry of Education” (Xiaozhou: 2018).

Among its tasks, the CSC makes support available for international academic exchange with China, providing both funding for Chinese citizens and residents to study abroad, and for foreign students and scholars to study in China. To that end, China invests yearly more than 3 billion yuan (\$ 469 million) on the education of international students (ECNS: 2018). The agency predominantly provides scholarships to individuals, including in batches allocated to specific foreign universities. The latter have to sign an MoU (here intended as a binding contract) under which the scholarship agreements operate.

CSC does not bear direct international marketing responsibilities. To pursue this end, in September 2010 the Chinese Ministry of Education launched the *Study in China* plan, which aimed to increase the international student population: the goal is that in 2020 China will host 500.000 international students (including 150,000 degree students) (EAIE: 2020). While China in the meantime has overtaken the UK to become the host of the second-largest international student population, after the USA, “Study in China” has morphed into “Campus China” which appears to operate under the direct control of CSC (Campus China: 2020). China’s investments of international students are based on the idea that they return to their home countries after graduation and become the “ambassadors” to convey the image of China. This is also related to China’s aspiration of building its soft power underlined by Xi Jinping’s strategy of the Chinese Dream. The international alumni of Chinese universities are expected to potentially facilitate China’s international cooperation and its race to distribute influence, values and ideologies to other states” (EAIE: 2020).

Though there is no directly accessible source about the organisation of CSC and its ties with the Central government, the Secretariat for China Scholarship Council is listed within the official website of the ministry of Education (MOE: 2020) as “affiliated institutions”, its secretariat being co-ordinated by the “National Study Abroad Fund” (CSC: 2020).

It may be therefore safe to conclude that China maintains direct governmental control over its two main instruments of internationalisation (CSC and Campus China), intended as a vehicle to promote the country's higher education system so to attract international students and hence enhance its international soft power.

Mission	<ul style="list-style-type: none"> ▪ The main focus is on higher education ▪ The agency's main objective is limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ N/A – an affiliated institution to the ministry of Education (MOE)
Funding model	<ul style="list-style-type: none"> ▪ N/A
Geographical foci	<ul style="list-style-type: none"> ▪ No specific countries are targeted
Membership	<ul style="list-style-type: none"> ▪ N/A
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ Though not directly managing third parties' programs, CSC website hosts many initiatives from third countries and international HEIs granting scholarships to study in China
Personnel	<ul style="list-style-type: none"> ▪ N/A
Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ The policy to attract international students is primarily a power politics demonstration, in the words of the very same representatives of government, CSC
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ Both CSC and SiC are explicitly quoted by top government sources as instruments to enhance the Country's soft power
IHE strategy	<ul style="list-style-type: none"> ▪ 0.4 (Research)
Softpower30	<ul style="list-style-type: none"> ▪ 27th (2019)

7.2.4 Spain – SEPIE / Study in Spain

SEPIE, the Spanish Service for the Internationalization of Education, is an affiliated entity ('organismo asociado') under the ministry of Science, Innovation, and University. For dissemination and follow-up, SEPIE counts on the collaboration of a wide network of institutions: Ministry of Education of the Autonomous Communities, Universities, Regional

Public Employment Services, Chambers of Commerce, employers' and trade union organizations and other institutions involved in training activities.

Though the Spanish ministry of University does not specify the framework of SEPIE's association, nor the funding and designation mechanisms, nonetheless the agency's mere presence in the ministry's website makes it realistic that there exists some form of inter-dependence: its public dimension is confirmed, for example, by the need to operate via public procurement acts (SEPIE: 2020), a typical feature of a public organism.

Though SEPIE's main function is to act as National Agency Erasmus + in Spain, managing all related resources (budgets, promotion, and impact studies) (ESN: 2020), the agency also participates actively in other European education initiatives and programs, and coordinates national and international projects, taking care of facilitating the internationalisation of the Spanish educational system.

SEPIE's annual budget is in the order of € 40 million (BOE: 2019), and it is made up by the state transfers, transfers from the European Union, and sales of services; the agency has a staff of 93.

Study in Spain is a classic promotion portal, providing logistic, administrative, and courses' information. It is managed by the 'Sociedad Mercantil Estatal para la Gestión de la Innovación y las Tecnologías Turísticas, S.A. (SEGITTUR)', though reports in its home page both the logo of the ministry of University, as well as SEPIE's (Study in Spain: 2020). International marketing is managed by SEPIE with a soft power perspective: "SEPIE also works on training programmes for professors from various Latin American countries, organises visits to HEIs abroad to encourage the creation of networks for joint work and projects, and strengthens the Spanish university system's brand image by participating in international events and fairs" (SEPIE: 2017).

Spain is well aware of the need to invest in soft power enhancement to the point that a 'Brand Spain' initiative was created in 2012, as a response to the deterioration of Spain's

image in the international media at that time (Rius-Ulldemolins: 2015). The initiative is twofold: to improve the image of Spain abroad, and to coordinate the activities of the public and private sectors. This was done by setting up a Board of Directors, comprising the Minister of Economy, Ministry of Culture, Ministry of Foreign Affairs, Spanish state television, the national financing agency and some representatives of the public sector.

Last, Spain does not hide her efforts to make use of higher education as a means of soft power enhancement: "higher education is one of the pillars of "soft diplomacy" [...]. The Spanish higher education system has historically had a great influence on Ibero-America, and its diplomatic role is experiencing a resurgence in the 21st century, as a fresh impulse is manifesting itself not only in Latin America but in other parts of the world as well" (SEPIE: 2017).

Mission	<ul style="list-style-type: none"> ▪ The main focus is on higher education ▪ The agency's main objective is limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ The organisation official operates "under" the ministry of University, and it is embedded within its website ▪ It is not evident how the ministry nominates the agency's top management, and if so does
Funding model	<ul style="list-style-type: none"> ▪ The agency's funds come from the state, the EU, and the selling of services
Geographical foci	<ul style="list-style-type: none"> ▪ Specific countries are targeted: a map on the website shows 39 countries targeted via communication and marketing initiatives. ▪ No branch offices
Membership	<ul style="list-style-type: none"> ▪ Not relevant
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ Erasmus +
Personnel	<ul style="list-style-type: none"> ▪ 93
Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ SEPIE is in charge of international promotion of the system ▪ SEPIE maintains a unit devoted to the internationalisation of the Spanish university system ▪ SiS organises international fairs and roadshows
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ SEPIE is aware of its role as a soft power vehicle, especially vs. Latin American Countries

	<ul style="list-style-type: none"> SEPIE has started to release international publications about its role of internationalisation player within the Spanish government
IHE strategy	<ul style="list-style-type: none"> 0.8 (British Council)
Softpower30	<ul style="list-style-type: none"> 13th (2019)

7.2.5 Finland - Finnish National Agency for Education (EDUFI)

The Finnish National Agency for Education operates under the ministry of Education and Culture, its core tasks being the development of education and training, early childhood education and lifelong learning, and to promote internationalisation in Finland (EDUFI: 2020). In the Finnish model, therefore, higher education policies and instruments are embedded within a broader agency, in charge of other different tasks.

The section of the agency that works in the field of higher education is aligned to Finland's traditionally neutral foreign policy, thereby maintaining a unit devoted to International higher education cooperation, supporting international cooperation between higher education institutions through different funding programmes.

Given its proximity with Sweden and the large Swedish-speaking minority within the country's boundaries, this agency maintains a unit responsible for developing education and early childhood education and care in Swedish (EDUFI: 2020).

As far as international marketing and promotion are concerned, the landscape looks a little untidy, with at least three different actors competing in the same arena.

- Studyinfo.fi is a classic-style portal portraying the benefits to attend university in Finland, and is maintained jointly by EDUFI and the ministry of Education and Culture (Studyinfo.fi: 2020); it acts as a (mandatory) collector of applications for Finnish universities, therefore holding an institutional status.

- Educationfinland.fi is a “governmental education export (emphasis added) programme, offering Finnish educational know-how and learning solutions globally” and is also part of EDUFI (Educationfinland.fi: 2020). Though the links between the two, at least at an organisational level, are not directly visible, nonetheless the program director's email re-directs to EDUFI's website. Educationfinland.fi is in charge of organising fairs and events, “increasing the visibility of our member companies by providing marketing and media channels and opportunities through our global network. Our aim is to increase the brand awareness of Finnish expertise and excellence in education. We aim to build the brand of Finnishness and that of the Finnish education sector companies”. Its members are private companies, consultancies, and private and public HEIs.
- Studyinfinland.fi is also run by EDUFI, and “is targeted at international students interested in the opportunities Finland offers in higher education”.

To sum up, EDUFI's links to the ministry of Education and Culture are not immediately evident in both websites, though the country's interest in the internationalisation of higher education is clear. The maintenance of multiple portals, all depending in some way to EDUFI and the ministry, confuses the readability of what is accountable to whom. Budgets, investments, and staff reporting to relevant units are not uploaded at the time of writing this work.

The unclear ties with the central government, especially for what concerns the capacity by the latter to appoint EDUFI's top management, together with the absence of information about the funding model make the agency looking like a sub-agency, rather than a national governmental agency *tout court*.

Mission	<ul style="list-style-type: none"> ▪ The main focus is on higher education ▪ The agency's main objective is not limited to HE internationalisation, which constitutes one of the pillars of the agency nonetheless
Level of governmental control	<ul style="list-style-type: none"> ▪ N/A
Funding model	<ul style="list-style-type: none"> ▪ N/A ▪ It is intended that Educationfinland.fi is also funded via private tertiary education companies
Geographical foci	<ul style="list-style-type: none"> ▪ Specific countries are targeted (e.g., Sweden, Russia, Eritrea, the US), also via bilateral programs ▪ No branch offices
Membership	<ul style="list-style-type: none"> ▪ Educationfinland.fi is open to public and private partners
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ EDUFI is "responsible for implementing and providing information about the European Union's programmes in our field in Finland" ▪ It "co-ordinates EU programs"
Personnel	<ul style="list-style-type: none"> ▪ 370 (EDUFI) ▪ Portals/marketing initiatives: N/A
Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ EDUFI somehow co-ordinates the three portals above described ▪ EDUFI maintains two units: International higher education cooperation and internationalisation services for higher education studies
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ Educationfinland.fi refers to nation brand and brand awareness ▪ The joint effort of EDUFI and its portals conceived as a means to enhance Finland's soft power
IHE strategy	<ul style="list-style-type: none"> ▪ 0.8 (Research)
Softpower30	<ul style="list-style-type: none"> ▪ 15th (2019)

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8. QGOs and Independent National Organisations

This chapter will investigate the two latter forms of agencies envisaged in chapter #6, QGOs and Independent National Organisations. It can be not straightforward detecting the degree of dependence of these kinds of agencies from governmental control, and hence from the process of agenda-setting and its relevance for the state soft power endeavours. Not always are all relevant political and administrative intersections, funding schemes, and the process of appointing top management available online, and rarely has further research, such as e-mail or other forms of direct contact, borne fruits.

More important, not always are state aware they are 'using' higher education as a tool to enhance their soft power: in some case (e.g., the UK) this process is open air, to the point that the agency itself work as a provider of white papers and detailed research on the topic. In other models accounted for (e.g., Chile), there is awareness, though the emphasis is given on the promotional / branding side of the story. In other examples (e.g. Italy), there is no straightforward evidence of an awareness of the relevance of internationalising HE as a soft power tool.

Moreover, the dividing line between the two categories examined in this chapter is often somehow blurred, as not all elements that may help the researcher are available to evaluation.

8.1 QGOs – Quasi-governmental Organisations

QGOs are supported by the government but managed privately: they have both public and private characteristics, not fitting neatly into either category. QGOs often is incorporated as a private, non-profit organization, but run by a board of directors that can be least partly appointed by a governmental unit. Normally, QGOs are funded from central and local

governments, but are free, or even encouraged, to fundraise elsewhere. The level of public funding may vary from a few percentage points of their national budget, up to a consistent part of it.

8.1.1 India - Study in India / EdCIL

Established under the MHRD (the ministry of Human Resources and Development) domain, 'Study in India' is a portal meant to foster international enrollment as well as for inter-institutional academic co-operation (Study in India: 2020). The program is in its second year and has been focusing on projecting India as a preferred education destination and to improve the country's soft power (Inside Higher Ed: 2019).

MHRD does not directly manage SII, the task being performed by EdCIL (India) Limited, a "Mini Ratna" Category-I Central Public Sector Enterprise, under the ministry of Human Resource and Development. Thus EdCIL is public, though not directly controlled by the Indian Government, which makes the company itself, and its endeavours, fitting well into the QGOs model described above.

EdCIL's mission is to "act as a "One Stop Shop" for international students in providing information on the vast choices of education available in India, assisting students in admission related queries and facilitating admissions, provide a platform to leading universities and institutions from India to showcase their strengths in higher education, covering various disciplines.

As far as legal capability is concerned, Study in India is in itself only a portal, all practical business being managed directly by EdCIL, including formal agreements (MoUs) with (academic) partner institutions. Being a direct fork of the central government, it is plain how the government's itself has a say within the company's upper echelons, though this direct link is not given evidence in the public company profile.

The unexpected 2020 coronavirus global health emergency may postpone the tangible outcomes of the 'Study in India' scheme, as well as the government's target of increasing the number of international students in India from the current 47,500 to 200,000 in the next two years. "but it should also be viewed as an opportunity for India to re-invent itself as an active player in 'post-COVID' global education" (University of World News: 2020).

The Research Fellowship (JRFs) Scholarships are offered by the Indian government for foreign nationals, which enables international students to undertake postgraduate studies/research at Indian universities in the areas of science, humanities and social sciences. These are awarded to students and teachers from developing countries in Asia, Africa, and Latin America (Becker: 2012).

Also, the 'Institution of Eminence' initiative needs to be accounted for. The scheme resembles the 5*100 Russian initiative, "being launched to implement the commitment of the Government to empower the Higher Educational Institutions and to help them become world-class teaching and research institutions" (UGC: 2020). Ten public and ten private institutions are to be identified to emerge as world-class teaching and research institutions. The project, which is coordinated by the University Grant Commission (UGC), aims to structure HEIs "to be rated internationally for [their] teaching and research as a top hundred Institution[s] in the world over time. The project's main features include freedom to hire from across the world, a reasonably good mix of Indian and foreign students, though with a significant proportion of international students, and a set faculty-student ratio: therefore, the plan is envisaged and designed to foster Indian HEIs' climbing of international rankings. I.e., a soft power approach.

Combined with the Global Initiative of Academic Networks and the Scheme for Promotion of Academic and Research Collaboration, the Institution of Eminence are the three major efforts the current Indian Government, led by Narendra Modi, is maintaining with the intent to enhance India's stand in the global academic landscape. "It has become increasingly

clear that the Modi government views the potential of the higher education sector not only as a tool of soft power but also as a means to enhance the country's international competitiveness" (Inside Higher Ed: 2019).

Last, there is no sign of India willing to pursue a language policy: there are two official languages in India, one being Hindi, the other English, with some 20 other major languages in India, written in 13 different scripts, with over 720 dialects.

Mission	<ul style="list-style-type: none"> ▪ The main focus is on higher education ▪ The agency's main objective is not limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ Study in India is a governmental project ▪ It is co-ordinated by EdCIL, a QGO ▪ Not clear, though likely, if EdCIL top management is nominated by the government
Funding model	<ul style="list-style-type: none"> ▪ By law, the company stock is majority-owned by the government ▪ N/A
Geographical foci	<ul style="list-style-type: none"> ▪ SII is mostly devoted to the international incoming degree-seeking students
Membership	<ul style="list-style-type: none"> ▪ N/A, though there is an "institutional log-in" access that suggests the direct involvement of HEIs
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ SII seems not to manage other agencies' programs
Personnel	<ul style="list-style-type: none"> ▪ N/A
Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ Study in India, with the help of the Ministry of Human Resource Development and the Ministry of Commerce and Industry, offers 2000 scholarships/year
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ The attraction of degree-seeking students ▪ Co-ordination of credit-mobility students ▪ Institute of Eminence's main objective is to assert India's academic soft power globally
Language teaching as a soft power tool	-
IHE strategy	<ul style="list-style-type: none"> ▪ 0.6 (research)
Softpower30	<ul style="list-style-type: none"> ▪ Not ranked

8.1.2 Netherlands – Nuffic / Study in Holland

Founded in 1952, Nuffic is an independent, non-profit organisation, loosely connected with the central state via its most important contract partners, which are the Dutch Ministry of Education, Culture & Science and the Dutch Ministry of Foreign Affairs. Nuffic itself uses the word “opdrachtgevers” (both meaning ‘customer’ and ‘principals’) when referring to the Dutch Ministry of Education, Culture and Science, the Ministry of Foreign Affairs and the European Commission (Nuffic: 2019), though it is self-evident that an organisation cannot simultaneously respond to the state and the European Union, therefore fitting the Dutch case in the QGO category quite well.

The way the organisation is funded, then, may help understanding its alignment to Dutch national policies: Nuffic’s main incomes are directly granted by the Dutch central government, and namely by the Ministry of Education, Culture and Science, which in 2019 contributed to the organisation’s finances with a total of € 20,7 million, out of the € 35,7 million representing the whole of its budget, i.e. the 58% (Nuffic: 2019). The ministry of Foreign Affairs provides another € 7,3 million, the European Commission € 4,3 million, plus are other incomes grant funds for € 3,1 million.

Over the last years, the relationship between Nuffic and its main sponsor, the ministry of Education, has become somewhat tense, as allegedly the Ministry is planning to safeguard some of the agency’s task by embedding them in legislation: for example, credential evaluation and management of scholarship and grant programs (The Pie: 2019).

Nuffic plays a significant role in fostering international cooperation in education between the Netherlands and other countries. The organisation performs a wide array of activities: from the management of state-funded scholarships to the recognition of international diplomas, and the Erasmus Programme. Internationalisation is pursued also through the co-ordination of other programs, which the agency manages on behalf of the Ministry of Foreign Affairs,

such as the Orange Knowledge Programme, which aims finance, via individual scholarships, mid-career professionals, who are nationals of some selected target countries.

Besides, Nuffic maintains a network of branch offices - the Netherlands Education Support Offices, or NESOs — organised to foster international education cooperation between the Netherlands and the countries in which they operate, for example for international student recruitment purposes. Offices are located in Brazil, China, India, Indonesia, South Korea, Mexico, Russia, Turkey, Vietnam, and South Africa, that is to say in the main student sending markets, globally. NESOs serve as “offices for Dutch knowledge diplomacy in the countries where they are located and have proved their value more than once” (Nuffic: 2020).

“Study in Holland”, a Nuffic Initiative (Study in Holland: 2020) is the classic promotion portal reporting the key information needed by international prospective students, or other interested learners. SiH seems to be quite well co-ordinated with the NESO offices described above, organising a joint calendar of education fairs worldwide.

Following a centuries-long tradition of mercantile operations, the Dutch higher education system is overall one of the most internationalised globally (British Council: 2019), and its internationalisation agency is widely considered as one of the most effective and efficient in the world. Though the political links between Nuffic and the Dutch government probably need to be examined further, it is clear that the latter has a primary interest in promoting the internationalisation of HE, an effort performed mainly, if not only, via the organisation of courses in English. There is no evidence of national interest in pushing towards an augmented use of Dutch as a teaching language or attempts to set up schemes for teaching Dutch abroad. In the Netherlands, this is today a pretty much internal debate between the faction that would prefer to keep on using mainly Dutch as teaching language at university, and those who would embrace an English-only policy altogether (University World News: 2019).

The foreign ministry's priority lies either on neighbouring states such as Belgium and Germany, on former colonies such as Indonesia, or strategically chosen partners in cooperation with the Dutch Regional Development Department, e.g. in the North Africa, Eastern Europe, Turkey or Russia (Riegler 2018). To this respect, Nuffic's extra-EU Nuffic's seem to dovetail with the central government's: the presence of the Netherlands –a comparatively small country- in the World's soft power top positions (Softpower30: 2019) demonstrates the level of effectiveness of these policies.

Mission	<ul style="list-style-type: none"> ▪ The main focus is on higher education ▪ The agency's main objective is limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ N/A
Funding model	<ul style="list-style-type: none"> ▪ Dutch ministries of Education and Foreign Affairs guarantee the vast majority of operational funding
Geographical foci	<ul style="list-style-type: none"> ▪ NESO offices are located in target countries, mainly for student recruitment purposes ▪ The Orange Knowledge Program focuses mainly on extra-EU countries
Membership	<ul style="list-style-type: none"> ▪ Not relevant
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ Nuffic manages Erasmus Plus for the Netherlands
Personnel	<ul style="list-style-type: none"> ▪ N/A
Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ Study in Holland is the main promoting vehicle, though the Organisation itself is widely present c/o international conferences and other initiatives
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ Recent-time relationships with the central government, mainly due to budget cuts, are noticeably problematic ▪ No specific evidence about central government approach vs. HE internationalisation, via Nuffic
Language teaching as a soft power tool	-
IHE strategy	<ul style="list-style-type: none"> ▪ 1.0 (British Council)
Softpower30	<ul style="list-style-type: none"> ▪ 10th (2019)

8.1.3 Chile: Prochile / Learnchile

Likewise Australia's Austrade, Chile has established Prochile, the institution of the Ministry of Foreign Affairs in charge of the promotion of Chilean goods and services, and of contributing to the development of the country, through the internationalisation of Chilean companies, the promotion of the country's image, foreign investment and tourism (Prochile: 2020). Hence, in the Chilean case, the projection of the country's image abroad is considered one of the assets to be incentivised by the ministry of Foreign Affairs: this is fostered also via the maintenance of a network of 53 branch offices worldwide. The value of the brand is monitored, also through positioning in international rankings: "our country brand has increased its value, tripling from 2010, from US\$106 billion to US\$310, according to the consulting firm Brand Finance. Besides, it is considered one of the 40 most relevant globally, with an important degree of knowledge and appreciation in markets that are key to our nation" (Prochile: 2018). Prochile is headed by the minister of Foreign Affairs in person.

Established in 2013, Learn Chile "is a network of more than 20 higher education institutions that receives government support through export promotion agency Prochile, whose aim is to promote the internationalization of the country's academic offering and raise awareness of Chile as an excellent destination for international students" (Learnchile: 2020).

This public / private partnership between the State (Prochile) and HEIs, is established to generate networks and achieve economies of scale for the diffusion and positioning of the academic supply of the Chilean educational sector, working their image under the attributes associated with the country brand (Universidad de Valparaiso: 2015).

The Learnchile platform manages funds jointly granted by Prochile and the Chilean universities: HEIS pay an annual quota which is in the order of CLP 6,300,000 (€ 6,700) per annum, while the contribution of Prochile to the endeavour is not known. The general purpose is to promote the Chilean educational system abroad, allowing the Chilean

university system to present itself internationally, via the participation at conferences (EAIE and NAFSA are mentioned), recruitment fairs, and workshops.

It is interesting to notice that Chile set up a governmental agency whose main purpose is to enhance the country's brand internationally, and it is relevant to underline that higher education, as a service, has relevance within such agency. In doing so, Chile has realised the importance of international education, specifically in the form of attracting foreign students, with a specific geographical focus in South America. Governmental control over Learnchile is loose, and the definition of strategic objectives is left in the hands of HEIs represented in Learnchile. In this context, the teaching of Spanish, which in any case could not be marketed as a trademark of Chile, as a country, alone, does not represent a peculiarity of the Chilean promotion system, though the portal duly reports a "Learn Spanish" section.

Mission	<ul style="list-style-type: none"> ▪ Learnchile's main focus is higher education ▪ Its main objective is limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ Prochile is headed by the minister of Foreign Affairs ▪ Learnchile: N/A
Funding model	<ul style="list-style-type: none"> ▪ Mixed: HEIs pay an annual fee, Prochile contributes to the initiative, though the level of contribution is not known
Geographical foci	<ul style="list-style-type: none"> ▪ Prochile: US, China, and South America ▪ Learnchile: mainly South America; no branch offices
Membership	<ul style="list-style-type: none"> ▪ HEIs can be members voluntarily
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ No
Personnel	<ul style="list-style-type: none"> ▪ Prochile: 400 ▪ Learnchile: N/A
Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ The agency participates to student recruitment fairs annually, including NAFSA and EAIE ▪ The agency produces merchandising and promotional material on behalf of the associated universities
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ Prochile: clearly-stated soft power mission ▪ Learnchile: attraction of degree-seeking students

	<ul style="list-style-type: none"> No think-tank role
Language teaching as a soft power tool	<ul style="list-style-type: none"> Learnchile portrays a “learn Spanish” section
IHE strategy	<ul style="list-style-type: none"> 0.6 (research)
Softpower30	<ul style="list-style-type: none"> Not ranked

8.1.4 Taiwan: FICHET / Study in Taiwan

The Foundation for International Cooperation in Higher Education of Taiwan (FICHET), was established in 2005, is jointly funded by the Ministry of Education and more than 100 universities and colleges in Taiwan, and represents a total of 116 member universities and colleges (FICHET: 2020).

The Foundation's objectives are widely comprehensive, ranging from general assistance to HEIs, to the organisation of conferences, education fairs, facilitating cross-strait exchange (i.e., relationship with China), amongst others. The Foundations maintains the promotional portal “Study in Taiwan” (see below).

The board is made of 17 directors and 5 supervisors, the chairperson is elected by the directors and the managing supervisor by the supervisors. Since an automatic appointment to of such bodies of the heads of relevant departments of the ministry of Education, including the politically-sensitive head of the Department of International and Cross-strait Education, government direct involvement is unquestionable. Another five board members are appointed by the Ministry of Education. Given the allocation of the other eight board's seats is a task of the FICHET's member institutions, and that HEIs directly appoint the President and the Chief Executive Officer, we can, therefore, conclude that the Foundation's governing body is a mixture of governmental and HEIs nominees.

Though the Foundation does not maintain branch offices, it has nonetheless founded a “Taiwan Education Center Mongolian (TECM)”, established in Ulaanbaatar with the main

purposes of enhancing the cultural exchange and academic collaboration between Taiwan and Mongolia.

FICHET's website advertises a 'New Southbound Talent Development Program', which is a classic 'leadership program' designed to enhance bilateral relations with selected partners. Interestingly, the program is not run by the Foundation, but by the ministry of Education itself (Edunspb: 2020), mainly in the framework of the ASEAN organisation, "to expand and deepen exchange with ASEAN and South Asian countries, the MOE has established a cross-departmental New Southbound Policy task force while planning to earmark a budget of NT\$1 billion (€ 30,6 million) [...] to bolster bilateral collaboration between universities in Taiwan and the targeted countries; create a friendly environment for foreign on exchange to the ASEAN region, and promote a talent cultivation plan for new immigrants' children".

FICHET also maintains a well-designed "Study in Taiwan" portal: it is a classic promotional portal characterised by two attention-grabbing features. First, a "Connect your country" page features information and downloadable material in Korean, Vietnamese and Indonesian, and offering further info in English for Japanese and Indian students: this clarifies where the special interest of the Foundation goes, geographically speaking. No attention is given to mainland China (Study in Taiwan: 2020). Second, the website sports an articulated "Learn Chinese in Taiwan" section, which is linked to an even richer Office of Global Mandarin Education (OGME) webpage. In Taiwan, teaching the Chinese language is taken extremely seriously, as the island claims its version of the idiom is the original (OGME: 2020). Given the peculiar history and actual geopolitical situation in Taiwan (Caspian Report: 2019), the use of language classes should not be interpreted as a way to impose one's culture abroad, but rather to differentiate the internal principles and beliefs, specifically vs. mainland China's. Anyway, a significant form of soft power assessment.

Mission

- The main focus is on higher education
- The agency's main objective is limited to HE internationalisation

Level of governmental control	<ul style="list-style-type: none"> FICHET's governing bodies are composed by a mixture of public and private nominees, though the managing bodies are an expression of HEIs alone
Funding model	<ul style="list-style-type: none"> N/A There is a governmental component and a component granted by HEIs
Geographical foci	<ul style="list-style-type: none"> N/A FICHET maintains a branch office in Mongolia
Membership	<ul style="list-style-type: none"> HEIs
Management of other agencies' programs	<ul style="list-style-type: none"> N/A
Personnel	<ul style="list-style-type: none"> N/A
Agency as a promotion vehicle	<ul style="list-style-type: none"> The organisation of fairs and promotion events Management of scholarships
Agency as a soft power vehicle	<ul style="list-style-type: none"> Not directly Teaching and promotion of Taiwan Chinese is a task devoted to OGME
Language teaching as a soft power tool	<ul style="list-style-type: none"> A whole agency, OGME, has been set up for that end
IHE strategy	<ul style="list-style-type: none"> 1 (research)
Softpower30	<ul style="list-style-type: none"> Not ranked

8.1.5 United Kingdom – The British Council / GREAT

The soft power the British university system exerts all over the world is palpable by anyone, not necessarily by people working in the higher education sector. If one imagines 'a' university, they immediately think about Oxford and Cambridge. Therefore, when describing the BC, and its international promotion arm, 'Study UK', there is a to describe an archetype of what a promotion agency *should* be, and how international marketing should be managed, rather than any promotion organisation. This, because BS is a language promoting agency, a think-tank, an event organiser, and a trend-setter among agencies –this besides managing an extensive network of branch offices all around the world. Also, the UK is fully aware of BC's role as a promoter of its soft power, and in turn, the agency wears those clothes only

too well, as the range of high-quality publications on the subject neatly testifies. As an example, "Source of Soft Power" (British Council: 2019) is a comprehensive report based on quantitative research that compares the soft power attractiveness of seven major countries, accounting for single attractiveness elements, and providing a "recommendations to UK policymakers" page.

Founded in 1934, the BC is registered as a charity, an executive non-departmental public body, and a public corporation, overtly sponsored by the Foreign and Commonwealth Office (British Council: 2020). "We work with more than 100 countries across the world in the fields of arts and culture, the English language, education and civil society. Last year, we reached more than 80 million people directly and 791 million people overall, including online, through broadcasts and publications".

As far as funding is concerned, about 85% of the BC's turnover is earned through teaching and exams, tendered contracts and partnerships (British Council: 2020), meaning that BC is financially self-sufficient, an element –as we have seen- rarely present in other entities. This furthermore means that BC's business is also linked to the promotion of English as a means of instruction, *per se* a soft power promotion feature, as we will see later. The British Council also receives grant-in-aid funding from the UK Foreign and Commonwealth Office, annually regulated by a "Management Statement and Financial Memorandum". "This makes up around 15 per cent of our total income, which "enables us to represent the UK's long-term *interest* in countries where we cannot rely on earned income alone".

BC is run by a 'Senior Leadership Team', responsible for the overall strategy, direction and management of the charity, which also relies on advice from sector advisory groups and UK country advisory committees. There operates a 'Board of Trustees', which acts as the guardian of the British Council's inherent purpose and is ultimately accountable for the organisation. Though there is no evidence of political inference in the nomination of top management, BC website reports that trustees are 'appointed', or at least some of them are

(British Council: 2020). Though loose, ties with FCO do exist, which is in some sense logic, not least given the annual funds BC receives from that ministry.

Though one may sustain that internationalising British higher education system is embedded in the BC's mission, this is only partly true as the entity's mission seems rather the promotion UK culture as a whole, rather than one specific element.

BC is active in the promoting UK higher education participating in all the major international conferences: in fact, the charity organises its own -Going Global- an annual conference for leaders of international education, with more than 1,000 sector leaders and global experts meeting annually to debate the future of further and higher education. BC also organises university fairs, often working alongside the GREAT campaign, "the Government's most ambitious international promotional campaign ever [...] The GREAT brand has a current value of £271m and has received 69 national and international awards to date (Great Britain Campaign: 2020). Of course, GREAT regularly features higher education as an element worth promoting and indeed characterising the essence of the British brand value. Last, BS runs a comprehensive website, Study UK, which is a classic promotional portal, jointly produced by BC and GREAT, interestingly translated in Chinese, Indonesian, Turkish, and Thai, which in turn may represent the today geographical foci of BC's international marketing.

The country strategic advantage lays both in its being the home of the world's *lingua franca*, as well as the site of some of the best-ranked university in the globe – two features that spring from centuries, if not millennia, of both hard, and soft power exercise. But the UK does not rest on its laurels and seems to have understood more than any other country, except France, the value of higher education internationalisation, and the importance of a working agency serving the system.

"Our priority is to deliver value for the UK and we are committed to strategically aligning our work to the long-term international priorities of the UK. We support the broad long-term

international policy interests and priorities of the Foreign and Commonwealth Office, other relevant UK government departments and the devolved governments in Scotland, Wales and Northern Ireland” (British Council: 2019). “The UK is a soft power superpower” can then candidly declare Sir Ciarán Devan, BC’s Chief Executive, in the foreword of the quoted BC publication “Sources of soft power” (British Council: 2020).

Mission	<ul style="list-style-type: none"> ▪ The main focus is not higher education ▪ The agency’s main objective is not limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ Board of Trustees likely, at least partially, nominated by FCO
Funding model	<ul style="list-style-type: none"> ▪ 85% own revenues ▪ 15% FCO
Geographical foci	<ul style="list-style-type: none"> ▪ Though some elements are pointing at some specific focus, in reality, BC’s focus is the whole world
Membership	<ul style="list-style-type: none"> ▪ N/A
Management of other agencies’ programs	<ul style="list-style-type: none"> ▪ N/A
Personnel	<ul style="list-style-type: none"> ▪ N/A
Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ BC publishes a “Study UK” website ▪ BC participates to fairs and events and organises its annual conference ▪ BC works alongside the GREAT initiative to promote the British higher education system
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ BC is also a think-tank, releasing studies and researches also on soft power, branding, and international promotion ▪ BC leadership is fully aware of the charity’s role as soft power enabler
Language teaching as a soft power tool	<ul style="list-style-type: none"> ▪ The promotion of English Language, also via the organisation of English certification centres
IHE strategy	<ul style="list-style-type: none"> ▪ 1 (British Council)
Softpower30	<ul style="list-style-type: none"> ▪ 2nd (2019)

8.2 Independent national organisations

Differences between QGOs and independent national organisations are somehow blurred, in the sense that spotting the exact organisational variations between the two forms may appear a mere academic exercise. That said, the peculiarity of independent national organisations is that they both promote the country's tertiary education, and they show no direct *formal* tie with that country's government, in the sense that they are not overtly controlled by any branch of that state organisation. Some elements, though, suggest such ties may nonetheless exist. First and most important, independent national organisations are funded by the state; second, there is an indirect control via the membership of HEIs to most organisations, where this feature applies. Put in another way, independent national organisations show the loosest of control possible, though states retain some hold, noticeably in the form of direct, or indirect, funding.

8.2.1 Turkey: TUPA/YOK – Study in Turkey

The interesting feature of the Turkish case is its twofold nature. On the one side, there exists a private entity, TUPA, on which limited information is available online. TUPA is active in establishing and maintaining relations between institutions and recruitment agencies, in organising promotional trips, as well as presenting Turkish higher education institutions in its website, Study in Turkey, a dotcom website (Study in Turkey 1: 2020).

“TUPA employs expert staff with years of experience in international agency relations. Through close ties and frequent visits to agencies worldwide, our dedicated staff organizes agents' seminars for educational consultants, thus keeping them informed about developments in Turkey's higher education sector, at specific universities and in our work (TUPA: 2020)”. The initiative works closely with state and private universities in Turkey, and its Advisory Board consists of representatives from the international offices of some state

and private universities, education journalists, international education agents, international education fair organizations, trade organizations and academics.

YOK (Yükseköğretim Kurulu), the Council of Higher Education (often referred to as “CoHE”), established in 1981 is “mainly responsible for the strategic planning of higher education, the coordination between universities, and most importantly establishing and maintaining quality assurance mechanisms” (YOK: 2020). Apparently, the Council is run and co-ordinated directly by HEIs only, at least reading the composition of its members; it serves, at least partially for the subject of the present work, as a think-tank, with documents available also in English. YOK maintains an international section, devoted to internationalisation which, here, is more intended as a component of the Bologna process, with elements of (international) quality assurance, rather than to international promotion (YOK: 2020). Nonetheless, some elements are worth reporting. First, YOK manages some scholarships program, intended to attract international students. Second, the Council operates in some foreign countries: though a positive list is not available, the evidence is given to missions in Africa, Azerbaijan, and Macedonia, i.e. countries located within Turkey's geopolitical sphere of influence (Caspian report: 2018). Third, Turkey as a nation is proud of her language and invests in its promotion via the TÖMER institute, which is based c/o the major universities. Interestingly, the website accounts for direct funding by the Turkish Economic ministry to 4 key sectors (sanitary tourism, IT, movie industry, and higher education), in a sense all belonging to the soft power categorisation envisaged in chapter # 3.

YOK maintains the other "Study in Turkey" portal (Study in Turkey 2: 2020), which duly maintains the letters 'gov' embedded in its URL ("studyinturkey.gov.tr"). The website is well designed and truly informative, though not much is said about Turkey's HE industry activities worldwide to promote itself as a study destination. That said, a wide, well-presented “Study in Turkey” pavilion is ordinarily spottable c/o the major HE conferences worldwide.

Mission	<ul style="list-style-type: none"> ▪ The main focus is on higher education ▪ The agency's main objective is limited to HE internationalisation (TUPA) ▪ The agency's main objective is not limited to HE internationalisation (YOK)
Level of governmental control	<ul style="list-style-type: none"> ▪ TUPA's Board does not include government nominees ▪ YOK's Board is composed primarily by university deans and professors
Funding model	<ul style="list-style-type: none"> ▪ N/A
Geographical foci	<ul style="list-style-type: none"> ▪ TUPA is mostly devoted to the international (outgoing and incoming) mobility of students
Membership	<ul style="list-style-type: none"> ▪ TUPA: N/A ▪ YOK: HEIs
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ TUPA seems not to manage other agencies' programs ▪ YOK: Erasmus Plus
Personnel	<ul style="list-style-type: none"> ▪ N/A
Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ Both TUPA and YOK run a circuit of international fairs and conferences
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ TUPA: no ▪ YOK: there is a weak connection with the ministry of Economy, though the nature of this tie is not highlighted. The MoE has declared higher education a key sector, together with sanitary tourism, IT, and the movie industry
Language teaching as a soft power tool	<ul style="list-style-type: none"> ▪ A whole agency, TÖMER, has been set up for that end
IHE strategy	<ul style="list-style-type: none"> ▪ 0.8 (research)
Softpower30	<ul style="list-style-type: none"> ▪ 29th (2019)

8.2.2 Japan: Jasso / Study in Japan

Accounting for Jasso, the Japanese Student Service Organisation, and its international marketing arm, Study in Japan, is inherently easy and difficult at the same time. On the one hand, all information that is relevant to the present work is immediately available online (Jasso: 2019); on the other, Jasso's formal political ties are not easy to frame, and the Organisation funding model is not easily detachable (Daiwa securities: 2019).

The Organisation was founded in 2004 as a core institution, with the purpose (as outlined in the Act on the Japan Student Services Organization, Independent Administrative Agency): "to support the promotion of international mutual understanding and the nurturing of creative human resources who will contribute to the next generation, by creating an appropriate environment for students studying in higher education institutions" (Scholarshipair: 2020). Out the three pillars into which the Organisation operates, the one relevant for this research is the 'Support Programs for International Students', which also includes the activities of the "Study in Japan" initiative. This pillar, which embraces the support for exchange students, the acceptance promotion program, and the accommodation and scholarship services, is funded by Jasso with some ¥ 15,7 billion (€ 124 million) per year, the Organisations' total annual budget being in the order of ¥ 1,077 billion (€ 8,5 billion).

The central Government directly funds the Organisation, which in any case can count also on private and alumni's donations, via grants and subsidies which in 2017 accounted for ¥ 95 billion, or € 705 million (Daiwa Securities: 2019). Conspicuous the amount may seem, it is necessary to remember that the great majority is speeded internally, i.e. for the benefit of Japanese students studying in Japan, and therefore only a part of it is invested into internationalisation policies.

Jasso maintains five overseas offices, located in Malaysia, in Thailand, in Indonesia, in South Korea, and in Vietnam (Jasso: 2019), a geographical organisation that reflects Japan's ambitions to act as a regional power, in the containment of both China's and Russia's (both either Communist or former Communist countries) local ambitions, rather than a world power, though evidence shows that the Kingdom may be abandoning the so-called 'Yoshida Doctrine' (The Diplomat: 2020).

The Organisation's internationalisation armed branch is 'Study in Japan', officially assigned the task to reach the "300.000 International Students Plan", which was designed in 2008, aiming to reach that number by 2020. Though Jasso's main focus, i.e. the management of

scholarships, still constitutes the key operative pillar of the program, a relevant international marketing activity has been introduced. Study in Japan offers a multi-language website articulated in 7 idioms, reflecting the Organisation's geographical foci, and organises yearly 17 booths c/o the most relevant fairs/exhibitions, including NAFSA, EAIE, and APAIE. Japan's recruitment efforts are mainly towards Asian countries, from where it recruits 93,4% of its students. On the contrary, Jasso's efforts to support outgoing Japanese learners are concentrated on the 'Western' university systems, but also South Korea, China, Taiwan, and Thailand.

Jasso is also in charge of the evaluation of the level of Japanese as a higher education study language, and as such maintains a centralised examination system ('Examination for Japanese University Admission for International Students', in short, 'EJU'). The agency also acts as a think-tank for the Japanese government and university system providing publications, yearly researches, and studies.

Japan's investment and efforts in international education are significant, as well as its efforts, accompanied by a well-stated and effective governmental policy, to attract foreign students, albeit mainly from neighbouring countries. Though the Organisation's ties with the central government are not clear, first and foremost as Jasso is statutorily an 'independent' agency, geographical foci seem aligned with the Country's, "a 'peace-loving nation' [with a] track record of international cooperation in non-military fields" (The Diplomat: 2020).

Though Japan had to momentarily renounce to hold its much-awaited 2020 Olympics Games due to the coronavirus outbreak, the Country still is a world soft power superpower (Japan Times: 2019): "Japan is currently doing a great deal to enhance its international standing. Besides tertiary education, one of the major soft power initiatives that Japan has invested billions in is the JET (Japanese Exchange and Teaching) Programme to give international graduates experience of teaching in Japan [which] has been a hugely effective means of increasing Japan's soft power" (Jetprogramme: 2020).

Mission	<ul style="list-style-type: none"> ▪ The main focus is on higher education ▪ The agency's main objective is not limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ N/A, though the Japanese government gives targets for the organisation to reach
Funding model	<ul style="list-style-type: none"> ▪ N/A
Geographical foci	<ul style="list-style-type: none"> ▪ Website available in 7 languages, which reflect SiJ's geographical foci ▪ Branch offices in Malaysia, Thailand, Indonesia, South Korea, Vietnam
Membership	<ul style="list-style-type: none"> ▪ Not relevant
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ No
Personnel	<ul style="list-style-type: none"> ▪ 532 ▪ SiJ: N/A
Agency as a promotion vehicle	<ul style="list-style-type: none"> ▪ SiJ participates to 127 fairs annually, including NAFSA, EAIE, and APAIE ▪ Jasso maintains a centralised examination service (EJU)
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ The attraction of degree-seeking students ▪ Co-ordination of scholarships ▪ Think-tank role
Language teaching as a soft power tool	<ul style="list-style-type: none"> ▪ The 'Examination for Japanese University Admission for International Students (EJU)' is directly run by Jasso
IHE strategy	<ul style="list-style-type: none"> ▪ 1.0 (research)
Softpower30	<ul style="list-style-type: none"> ▪ 8th (2019)

8.2.3 Italy: Uni-italia / Study in Italy

The peculiarity about the Italian promotion system is that it has a twofold organisation. On the one side, there exists an agency, Uni-italia, which is a private association and as such legally detached by the government, although its operative site is placed within the building of the ministry of Foreign Affairs and Co-operation (MAECI). Its legal site, though, is placed in Milan, c/o the premises of the preeminent Italian think-tank on foreign affairs, ISPI.

On the other, there is the 'Study in Italy' portal, which is co-ordinated by MAECI itself, its website being embedded within the ministry's (Study in Italy: 2020). Study in Italy is a classic

institutional portal, designed to provide information about courses, grants, fees, and enrollment procedures. Unlike other similar portals, apparently behind the Study in Italy initiative, there is not an operational organisation structured to actively market the country's tertiary education abroad, this role is left to Uni-italia (see below). Though the meagre dedicated page of the Foreign Ministry reports link to Uni-italia and other stakeholders (MAECI: 2017), this is not the case for the Study in Italy initiative, that therefore looks somehow detached from the others.

Parallel, MAECI fully recognises the importance of the international promotion of the country's tertiary education: "The promotion abroad of the Italian higher education system is by all means a driving force for Italy's economic development, due to the direct and indirect impact that a higher level of internationalisation of Italy's higher education institutions would have on *'Brand Italy as a whole'*" (MAECI: 2017).

Uni-italia was founded in 2010 "jointly by the Ministry of Foreign Affairs and International Cooperation, the Ministry of Education, University and Research, the Ministry of Interior [with] the aim of promoting Italian Higher Education and the mobility of foreign students and researchers towards Italian universities as well as encouraging academic cooperation between Italy and other foreign countries" (Uni-italia: 2020). The Association maintains branch offices in several countries, including China, India, Indonesia, Iran and Vietnam: its operative bureaus are located within the embassies compounds abroad.

Uni-italia's agenda is defined by its 'council', which is composed of 7 members, 3 of which nominated one each by MAECI, the Interior ministry, and the ministry of Education. The procedure to nominate the President and the Secretary General is not accounted for in the website, nor is Uni-italia entrenched within any of the three quoted ministries' organigrams. The official document "Strategy for the international promotion of higher education 2017 / 2020", jointly released in 2017 by MAECI and the minister for the University (MAECI-MIUR: 2017), represents a clear enunciation of what the Italian higher education 'foreign policy'

should be, including a shortlist of main geographical targets (China, India, US, Mexico, Israel, Argentina, Iran, Ethiopia) and a further list of another 26 countries. Though not providing a clear objective in terms of how many students should the system recruit per year, the same document states that “it is time for Italy to strengthen its support structure for the promotion abroad of their higher education system, following the example of other countries (such as the Germany with the DAAD, the United Kingdom with the British Council, etc.) thought strategic decisions must remain in the hands of [...] MAECI and the ministry of education (MAECI-MIUR: 2017). This support structure, named “Uni-italia 2.0”, should be self-funded as much as possible, and capable to apply for, and score, EU funds where available.

A truly internationalisation engine of the Italian culture as a whole, and hence of the higher education sector as well, is the ‘Società Dante Alighieri’, established in 1893 with the purpose to foster the knowledge of the Italian culture and language in the world. Today, the association educates annually more than 120,000 learners, via a network of 401 committees, and 300 libraries, scattered around the globe (Società Dante Alighieri: 2020). Dante Alighieri is independent from Uni-italia, and from MAECI, to which is nonetheless linked via an operational agreement. There is scarce evidence of the Dante Alighieri’s vision as a soft power instrument, though mention to ‘national identity’ is made in her website.

The Italian model, where the rectors’ association (the CRUI) also plays a key role, especially as a think-tank, can be described as one of “bargained pluralism”, as on the one hand it clearly describes the nation's interest in the internationalisation of its HE system, and the promotion of its universities abroad, on the other, fails to identify which ministry has the lead, and most importantly to grant Uni-italia (or Uni-italia 2.0) the necessary funds to “follow the example of other countries”. Further, there is no clear evidence of a national debate upon soft power, and even less upon the ties between soft power and the internationalisation of the university system.

That said, the Country scores remarkably well in the softpower30 index (in 2019, it was in 11th position globally), though one of the indicator that may need worth investing on appears, exactly, the higher education one (14th globally).

Mission	<ul style="list-style-type: none"> ▪ The main focus is higher education ▪ The agency's main objective is limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ N/A ▪ The association is located within the ministry of foreign affairs
Funding model	<ul style="list-style-type: none"> ▪ N/A, no budget available ▪ Member HEIs partially fund the association via a very limited annual fee
Geographical foci	<ul style="list-style-type: none"> ▪ Website available in 2 languages ▪ Branch offices in Iran, China, Indonesia, Vietnam, India
Membership	<ul style="list-style-type: none"> ▪ HEIs can be members voluntarily
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ No
Personnel	<ul style="list-style-type: none"> ▪ N/A ▪ Sil: N/A
Agency as promotion vehicle	<ul style="list-style-type: none"> ▪ The agency participates to student recruitment fairs annually, including NAFSA and EAIE
Agency as a soft power vehicle	<ul style="list-style-type: none"> ▪ The attraction of degree-seeking students ▪ Limited think-tank role
Language teaching as a soft power tool	<ul style="list-style-type: none"> ▪ A whole association (Società Dante Alighieri) is devoted to the scope
IHE strategy	<ul style="list-style-type: none"> ▪ 0,4 (British Council) ▪ 0,6 (research)
Softpower30	<ul style="list-style-type: none"> ▪ 11th (2019)

8.2.4 Austria: OeAD / Study in Austria

The OeAD is the Austrian agency for international mobility and cooperation in education, science and research. With a budget of more than 70 million euros and more than 250 employees in 2020, the OeAD “promotes and connects people and institutions with future-

oriented programmes in education, science, research and culture” (OeAD: 2020). The agency is incorporated as a GmbH (Gesellschaft mit beschränkter Haftung) meaning ‘company with limited liability’, broadly equivalent with the private limited company in the United Kingdom and many Commonwealth countries, and the limited liability company (LLC) in the United States. This is one of the reasons why the agency is listed here as an independent national organisation. Not much is said about how top agency management is nominated, whether it be from the Federal Government, or otherwise.

What it is interesting to underline, is that OeAD considers higher education a commodity, that therefore can be exported: "We manage international cooperation programmes and coordinate and support their implementation. For example, there is a special focus on development cooperation and exporting education. The agency coordinates the international marketing of higher education and represents Austria as a location for learning and research around the world (OeAD: 2020).

The agency, which also is in charge of the management of the Erasmus + “Programme for Austria, performs a wide array of relevant tasks in the field of HE internationalisation, noticeably as a vehicle of lobbying actions/information (“represent Austrian interests at European and international institutions on behalf of the federal government”), as well as a broker between public and private needs and plans (“carry out programmes and measures with public and private providers of funds to make education more international”) (OeAD: 2020).

The main contributor to the agency’s budget is the EU (€ 32,3 million), via the Erasmus+ Program, whereas 2.8 million come from (a ministerial-funded?) cooperation in development action; another 2,8 million by “Third-party programmes”. A further € 11,6 million is granted by the Austrian Federal Minister of Education, Science and Research (BMBWF), in which website, curiously, OeAD is scarcely nominated (BMBWF: 2020). Also interestingly, the

ministry's section about "Studying in Austria" reports only a "Studienwahl" initiative (BMBWF: 2020), whereas does not mention OeAD and its other promotion portals.

There are two international promotion portals of Austrian higher education, Studienwahl and Study in Austria, the latter being somehow better designed, more complete, and user-oriented. Fact is, both are powered by OeAD (Study in Austria: 2020; Studienwahl: 2020).

Study in Austria is published in German and in English, though leaflets are available in 11 different languages among which, due to proximity / foreign policy issue, in Bosnian, Croatian and Serbian. The website accounts also for the fairs/conferences the Austrian Higher Education is presented, among which all major HEI conferences (EAIE, NAFSA; APAIE). The website also mentions the initiative's social media channels.

Studienwahl, also bilingual, reports the BMBWF logo and looks more like a brochure listing all courses available in Austria, then a traditional information portal, at least by international standards. "Explore the database, inform yourself about more than 2000 degree programmes at more than 70 higher education institutions in the heart of Europe and find your programme! For all further information about studying in Austria see www.studyinaustria.at or contact the OeAD" (Studienwahl: 2020).

Little reference is made to language-related issue: the website duly reports a 'study German' section, but the impression is that Austria does not play that card in soft power terms.

With less than 9 million inhabitants, Austria is 16th globally in the softpower30 index (Softpower30: 2019), though there are few mentions about Austrian soft power in the material examined. The fact that OeAD is a limited company, scarcely nominated in governmental websites, confirms the hypothesis that there is no clear cause-effect link between Austria's internationalisation efforts and the possible benefits for the country's soft power standing. That said, HE is perceived as a commodity, a strategic commodity, that as such can be exportable; plus, OeAD is somehow in charge of lobbying actions and principally international information about Austrian universities as a study destination, that

makes this case study interesting, not least because the investment the Federal Government makes annually on the company is not irrelevant.

Mission	<ul style="list-style-type: none"> ▪ The main focus is higher education ▪ The agency's main objective is limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ N/A ▪ OeAD is a limited company
Funding model	<ul style="list-style-type: none"> ▪ Majority of resources are granted by the ministry of Education, Science and research ▪ The EU funds the company via Erasmus Plus
Geographical foci	<ul style="list-style-type: none"> ▪ Website available in 2 languages ▪ No branch offices ▪ Special attention to the Balkans region
Membership	<ul style="list-style-type: none"> ▪ N/A
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ Erasmus Plus
Personnel	<ul style="list-style-type: none"> ▪ N/A
Agency as promotion vehicle	<ul style="list-style-type: none"> ▪ The agency participates to student recruitment fairs annually, including NAFSA, EAIE and APAIE
Agency as soft power vehicle	<ul style="list-style-type: none"> ▪ The attraction of degree-seeking students ▪ "Lobbying and information" vehicle ▪ Think-tank role
Language teaching as a soft power tool	<ul style="list-style-type: none"> ▪ 'Study German' section available
IHE strategy	<ul style="list-style-type: none"> ▪ 0,8 (research)
Softpower30	<ul style="list-style-type: none"> ▪ 16th (2019)

8.2.5 Germany: DAAD / Study in Germany

Founded in 1925, the German DAAD (German Academic Exchange Service) is a private, federally funded, EU-funded, and state-funded, self-governing national agency of the institutions of higher education in Germany, representing 365 German HEIs (100 universities and technical universities, 162 general universities of applied sciences, and 52 colleges of

music and art). Legally speaking, the DAAD is “a registered association (Eingetragener Verein) of German institutions of higher education and their student bodies” (DAAD: 2020), meaning that it represents both institutions and students. The association is run by an executive committee, which is composed of university representatives. As “guest members”, DAAD sports officials for the Federal Foreign Office, the Federal Ministry of Education and Research (BMBF), Federal Ministry for Economic Cooperation and Development (BMZ), the Donors' association for the promotion of humanities and sciences in Germany (Stifterverband für die Deutsche Wissenschaft), and the Standing Conference of the Ministers of Education and Cultural Affairs of the Länder in the Federal Republic of Germany. As permanent guests, the president of the Alexander von Humboldt Foundation, the president of the Goethe-Institut, and president of the German Rectors' Conference also hold a seat. It follows that, in the German case, the entity is governed by HEIs, though both the civil society and the state, have a say.

In particular, the Federal State finances a good share of DAAD's staggering € 627,6 million annual budget, € 11 million by the Federal Foreign Office, € 151 million by Federal Ministry of Education and Research (BMBF), € 55 million Federal Ministry for Economic Cooperation and Development (BMZ), and even € 1 million by the Federal Ministry for Economic Affairs and Energy (BMWi), thus demonstrating to what extent the DAAD represents the interest of the complete spectrum of stakeholders of the German state as a whole. Also, the EU and other international organisations contribute for more than € 180 million yearly. The peculiar combination of public funds and private governing bodies makes DAAD a perfect example of the “independent national organisation” described here.

With 15 Regional Offices, 5 German Centres for Research and Innovation (DWIH), 57 Information Centres (IC), the DAAD's geographical focus is the entire globe, therefore reflecting Germany's role as a soft-, and hard-, superpower. The annual publication reports activities in Western, Central and South-eastern Europe, Eastern Europe, Central Asia and

South Caucasus, North America, Latin America, Middle East, North Africa, Sub-Saharan Africa, Asia, Pacific (DAAD: 2018). DAAD has overall 842 staff members.

“The most important responsibilities of the DAAD include granting scholarships, promoting the internationalisation activities of German universities and research organisations, strengthening German cultural and language studies abroad and helping developing countries establish productive higher education institutions. The DAAD is also the National Agency for EU Higher Education Cooperation” (DAAD: 2020).

The association's organisation and activity follow three main lines:

- ‘Scholarships for the Best’. In a sense, DAAD’s core business since its foundation, the association provides scholarships both for German and for international students;
- Structures for Internationalisation. DAAD manages both third party programs, as in the case of Erasmus, as well as organising specific internationalisation programs, peculiar to the German HE environment;
- Expertise for Academic Collaboration. Acting as a think-tank, DAAD is fully endorsed by the German Federal Government, with which, for example, the association shares common goals in the field of student recruitment.

About international communication, the DAAD powers a stylish "Study in Germany" website (Study in Germany: 2020), which is a classic promotional portal with a dynamic "events" section, accounting for international fairs and expos DAAD participates in, for the representation of German HEIs.

As the driving force behind the internationalisation efforts of German universities, DAAD supports developing countries in organising their higher education systems and promotes the study of the German language and German Studies abroad. For example, DAAD in its function as an outspoken German soft power vehicle has been assessed and studied

extensively in the case of Kazakhstan (Matkarimova: 2018). To this respect, the Association's ideas are very clear: by the year 2020, the DAAD envisioned 50% of each year's graduating class gaining substantial academic experience abroad during their studies. Furthermore, it aimed to increase the number of foreign students at German universities to 350,000 by the year 2020.

Lastly, language promotion. Though it's an official language in other countries, notably Austria and Switzerland, German belongs first and foremost to Germany, and it is widely, and increasingly, being used as a 'trade' language, especially in Eastern Europe (ICEF: 2015).

German is taught at language schools all over the world, such tasks being performed by Goethe-Institut, which has some 159 offices spread in 94 countries. Germany invests significant sums in international cultural institutions: the DAAD and the Goethe-Institut, and several other bodies, "facilitate major flows of people and ideas between Germany and the rest of the world (British Council: 2018).

In the case of Germany, the correlation between the above-described substantial investment in the promotion of the tertiary system, and the enhancement of the country soft power is best described by the Federal Foreign Office itself: "As a trading nation, Germany has a particular interest in an effective external economic policy that helps companies to tap into international markets and to improve the conditions for doing business. Cultural relations and education policy form the third pillar of German foreign policy. Its instruments include academic exchange, international German schools and the promotion of German as a foreign language. By fostering intercultural dialogue, this policy creates a solid foundation for international relations and global trust in Germany – a particularly important function for a country that has such close international ties [...] a broad foundation for stable international relations" (Federal Foreign Office: 2020).

Mission	<ul style="list-style-type: none"> ▪ The main focus is higher education ▪ The agency's main objective is not limited to HE internationalisation
Level of governmental control	<ul style="list-style-type: none"> ▪ N/A, though governmental officials sit as observers in the executive committee ▪ DAAD is a private association
Funding model	<ul style="list-style-type: none"> ▪ Majority of resources derive from federal state transfers ▪ The EU funds the company via Erasmus Plus
Geographical foci	<ul style="list-style-type: none"> ▪ Website available in 2 languages ▪ 78 branch offices/info points ▪ No specific geographical focus, though special attention is given to specific countries, depending on national policies
Membership	<ul style="list-style-type: none"> ▪ HEIs, students
Management of other agencies' programs	<ul style="list-style-type: none"> ▪ Erasmus Plus
Personnel	<ul style="list-style-type: none"> ▪ 842
Agency as promotion vehicle	<ul style="list-style-type: none"> ▪ The association participates to student recruitment fairs annually, including NAFSA, EAIE and APAIE ▪ The association maintains a dynamic "Study in Germany" website
Agency as soft power vehicle	<ul style="list-style-type: none"> ▪ The attraction of degree-seeking students ▪ "Lobbying and information" vehicle ▪ Investment in student mobility ▪ Think-tank role
Language teaching as a soft power tool	<ul style="list-style-type: none"> ▪ A whole agency, Goethe-Institut, which is present in 94 countries, is devoted to the scope
IHE strategy	<ul style="list-style-type: none"> ▪ 1 (British Council)
Softpower30	<ul style="list-style-type: none"> ▪ 3rd (2019)

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9. Conclusions

The goal of this work was to investigate if there is a correlation between state-boasted soft power on the one side, and the internationalisation of higher education on the other, and to verify whether there are states were a) aware of this correlation and b) purposely relying upon their national promotion agencies to enhance their international image.

To this extent, the 20 national cases which were examined in-depth show that correlations are not easy to detach. There is evidence of states pursuing soft power via a bespoke interest of their heads of government in internationalisation and states where these ties are less marked.

The following chart sums up all the relevant data, either mined or researched throughout this work. The 'weighted IHE strategy' KPI is calculated upgrading 0.2 to 0.25; 0.4 and 0.6 to 0.50; 0.8 to 0.75. 1 is left equivalent to 1.

State	Model	Think-tank features	Branding features	Soft Power awareness	IHE strategy	TOTAL	Softpower30
Australia	National Governmental Organisations	1.00	1.00	0.75	1.00	3.75	9
Austria	Independent National Organisations	0.75	0.50	0.25	0.75	2.25	16
Chile	Independent National Organisations	0.00	1.00	1.00	0.50	2.50	/
China	Sub-agencies	0.00	0.00	0.25	0.50	0.75	27
Estonia	Sub-agencies	0.00	0.75	0.50	0.75	2.00	/
Finland	Sub-agencies	0.75	1.00	0.75	0.75	3.25	15
France	Sub-agencies	1.00	1.00	1.00	1.00	4.00	1
Germany	Independent National Organisations	0.75	0.75	1.00	1.00	3.50	3
India	QGO	0.00	0.00	0.25	0.50	0.75	

							/
Italy	Independent National Organisations	0.50	0.00	0.25	0.50	1.25	11
Japan	Independent National Organisations	1.00	0.75	0.75	1.00	3.50	8
Netherlands	QGO	1.00	0.50	0.50	1.00	3.00	10
Russian Federation	National Governmental Organisations	0.25	0.75	1	0.50	2.50	30
Spain	Sub-agencies	0.50	0.25	0.75	0.75	2.25	13
Sweden	National Governmental Organisations	0.50	1.00	1.00	0.50	3.00	4
South Korea	National Governmental Organisations	0.00	0.75	1.00	0.50	2.25	19
Taiwan	QGO	0.25	0.75	0.25	1.00	2.75	/
Turkey	Independent National Organisations	0.25	0.00	0.25	0.75	1.25	29
U.K.	QGO	1.00	1.00	1.00	1.00	4.00	2
U.S.	National Governmental Organisations	1.00	0.50	1.00	0.50	3.00	5

Two broad conclusions can be drawn.

1. Agencies' typology vs. states' performance

National Governmental Organisations seem to be the most 'successful', as they score an average of 2.9 points, versus 2.5 points of Sub Agencies, 2.6 points of QGOs, and 2.35 points of Independent National Organisation.

As progressively the state loosens its control over the national agency, a downgrade trend of this indicator is observable.

Model	Total	Mean
National Governmental Organisations	14.5	2.9
Sub-agencies	12.5	2.5
QGOs	13.0	2.6
Independent National Organisations	11.75	2.35

The exception is National Governmental Organisations. But its scores are heavily influenced by the negative ‘performance’ of China’s CSC indicators: the fact that there is no web-based evidence of think-tank and branding features does not *per se* mean that these features do not exist, given the well-known Chinese reluctance in posting confidential information. Moreover, one could claim that a policy of granting scholarships to foreign perspective students is *per se* a national branding policy. And anyhow there are other National Governmental Organisations not considered by the present research that may have aligned the overall research’s results.

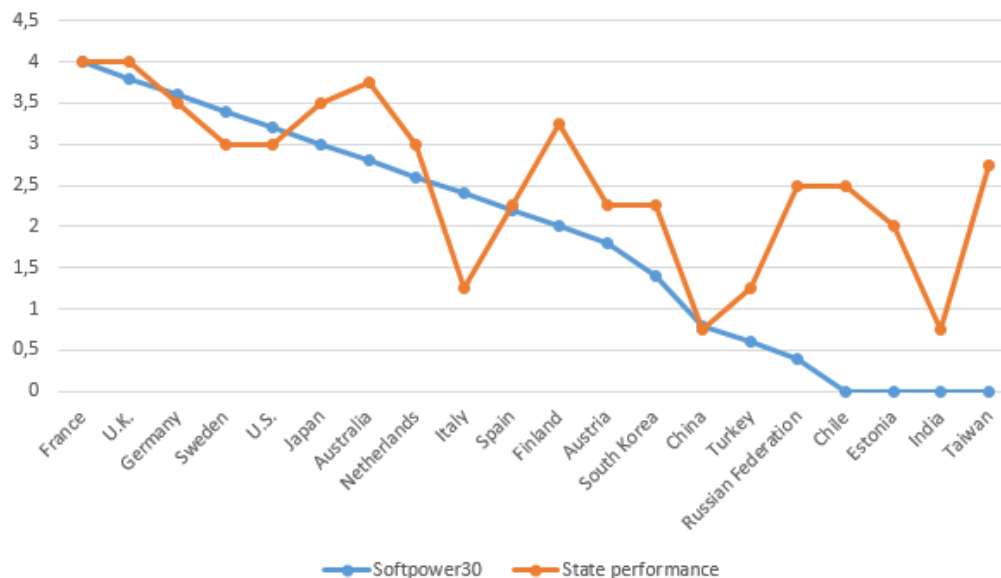
2. Agencies performance vs. Softpower30

The second conclusion accounts for the states’ overall performance vs. their Softpower30 index performance (2019). Where the state was not classified, an *ex officio* ‘35’ score was arbitrarily assigned.

State	Agency Typology	Performance	Softpower30
France	Sub-agencies	4.00	1
U.K.	QGO	4.00	2
Germany	Independent National Organisations	3.50	3
Sweden	National Governmental Organisations	3.00	4
U.S.	National Governmental Organisations	3.00	5
Japan	Independent National Organisations	3.50	8

Australia	National Governmental Organisations	3.75	9
Netherlands	QGO	3.00	10
Italy	Independent National Organisations	1.25	11
Spain	Sub-agencies	2.25	13
Finland	Sub-agencies	3.25	15
Austria	Independent National Organisations	2.25	16
South Korea	National Governmental Organisations	2.25	19
China	Sub-agencies	0.75	27
Turkey	Independent National Organisations	1.25	29
Russian Federation	National Governmental Organisations	2.50	30
Chile	Independent National Organisations	2.50	35
Estonia	Sub-agencies	2.00	35
India	QGO	0.75	35
Taiwan	QGO	2.75	35

In the following chart, the Softpower30 indicators have been normalised to make them comparable, in scale, with the overall state performance.



Though there is not an immediate and direct correlation, nonetheless the trend is clear, with some evident exception, namely Australia, Italy, Finland, The Russian Federation, Chile, Estonia, and Taiwan. There are immediate explanations for each deviant case: for instance, one may claim that Italy's respectable Softpower30 results are mainly due to the spectacular

outcome of the 'polling' indicator (where the Country is #1 in the World), and thus that the other Softpower30 indicators align with the performance indicator designed here. Or, conversely, that Australia's deviation depends on the huge investment in student recruitment by that country.

Overall, though, as certain correlation is evident, further research is needed to verify whether or not other cases, not reported here, align to the findings of the present research.



Università
Ca' Foscari
Venezia

Corso di Laurea
Magistrale
in
Relazioni Internazionali
Comparate

Tesi

**Soft power e
internazionalizzazione: il ruolo
delle agenzie di promozione dei
sistemi universitari**

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9. Conclusioni

Riassunto in lingua italiana

Il presente lavoro intende approfondire se, e in che misura, esiste un legame tra il *Soft Power* di uno Stato e la sua volontà di internazionalizzare il proprio sistema di educazione universitaria, segnatamente per mezzo di un ente o agenzia deputato alla promozione del sistema universitario stesso.

Il tema quindi è duplice: da una parte, è necessario comprendere se e in che misura il *Soft Power* rappresenti un elemento fondante del “potere” di uno Stato in nell’arena internazionale, potere che si aggiunge al più classico *Hard Power*, a sua volta costituito dalla componente economica e da quella militare.

Al fine di comprendere le dinamiche e i processi che sottendono a questa realtà, lo studio inquadra dapprima il concetto di *Soft Power*, così come enunciato dall’accademico statunitense Joseph S. Nye, Jr. Per Nye, la formazione, e segnatamente l’educazione universitaria, rappresenta uno degli assi portanti della proiezione internazionale di uno Stato perché, tra le altre cose, contribuisce a accrescere la percepita immagine internazionale di uno Stato, non ultimo attraendo studenti per tramite del prestigio esercitato dai propri atenei. Per Nye, il *Soft Power* ha tre componenti essenziali: la cultura, i valori politici, e la politica estera. Sebbene alcuni critici abbiano rilevato come questa categorizzazione abbia dei limiti, primo fra tutti la difficoltà di misurazione, cionondimeno il concetto di *Soft Power* è entrato nell’uso comune delle relazioni internazionali, a aiuta a comprendere i movimenti e gli investimenti nazionali, tesi a accrescere la percezione che i cittadini di altri Paesi hanno nei confronti dello Stato che opera tali investimenti.

Lo studio prende quindi in esame gli investimenti statali nelle aree costituenti il *Soft Power* e, ove possibile riporta ulteriori elementi di valutazione, corredati, ove presenti, da ranking internazionali o comunque da comparazioni intersettoriali.

L'indice degli investimenti in diplomazia pubblica (*Public Diplomacy*) rappresenta un indicatore centrale in questo senso, così come la definizione di branding nazionale (*Nation branding*), ossia il modo con cui uno stato si presenta nel palcoscenico globale, al fine di aumentare il consenso sulle proprie politiche e rafforzare un'immagine positiva presso gli osservatori e l'opinione pubblica mondiale. Anche per il *branding* esistono ranking internazionali: in questo caso viene preso in esame *Brand Finance*, che a sua volta utilizza metriche legate a tre categorie: a) beni e servizi; b) società (qualità della vita, corruzione, etc.); c) investimenti (R&D, tecnologia, etc.).

Tra le risorse (*asset*) che contribuiscono a incrementare il Soft Power, la ricerca considera la produzione cinematografica, i flussi turistici, i fondi per la cooperazione allo sviluppo, i sistemi museali, e il numero di imprese start-up.

Un focus speciale è riservato al tema della formazione terziaria, e al ruolo che essa può rivestire, e spesso riveste, nell'affermazione internazionale dell'immagine del Paese ove tale formazione è offerta: si pensi alle università dei Paesi anglosassoni, alle loro performance nei ranking internazionali, e al conseguente quasi-omologia che si tende a operare tra università, in senso lato, e ateneo, inteso come singola università (vedasi ad esempio i casi di Oxford e di Harvard). Il brand-Paese, e di conseguenza il suo *Soft Power*, insomma, beneficia del prestigio del sistema universitario che ospita, non ultimo perché questo fenomeno stimola il reclutamento di studenti e di docenti internazionali qualificati (*brain drain*), e contemporaneamente consente al sistema, inteso come la sommatoria tra l'università e il territorio che la ospita, di poter contare su importanti flussi di capitali in entrata. A titolo di conferma, si veda come sia stato sufficiente che la pandemia Covid-19 dei primi mesi del 2020 bloccasse i flussi internazionali di studenti verso taluni Paesi aggrediti dal virus (Regno Unito e Stati Uniti su tutti) perché alcune università, anche prestigiose, dovessero ricorrere ad aiuti statali esattamente per il venir meno delle entrate garantite dagli studenti internazionali.

Particolare attenzione è infine riservata all'indice *Softpower30* il quale, benché di recente istituzione, è già assunto a paradigma di riferimento per gli esperti del settore, tanto da riportare regolarmente, nell'edizione che è annuale, uno scritto dello stesso Nye. L'indice è composto da 5 elementi: cultura, impresa, *engagement*, digitale, governo, e formazione (intesa qui principalmente come formazione terziaria): la ricerca da particolare risalto a come l'indice definisce tale componente.

Nell'impossibilità di coprire tutti i casi-paese, o anche un numero congruo di esempi, il presente lavoro approfondisce quindi quattro diversi approcci a quel *country branding* che ne è elemento portante. Nel caso degli Stati Uniti, l'approfondimento è incentrato sul "modello Hollywood", ossia su come Washington (in questo caso, Los Angeles) sia stata in grado di presentare al mondo un'immagine di sé positivista, sana, sportiva, progressista, e quindi di far passare il messaggio di come la leadership americana, non ultimo intimamente rispettosa della privacy e del libero mercato, offrisse un modello tutto sommato rispettoso delle individualità (statali) nella cerchia del proprio impero economico, culturale, e militare. Per dirla come gli antichi romani, un mix di *cuius regio, ei religio* e di dare a Cesare, quello che è di Cesare.

La Francia propone un modello che è figlio della Rivoluzione, nel senso che prevede da una parte una rigorosa difesa dei diritti umani, e dall'altra una libertà (*liberté*) delle componenti dello Stato che si trasmette anche in campo internazionale, dalla difesa delle minoranze, a quella della libertà di parola. La Cina pare, invece, prospettare un prototipo nuovo, che coniuga una forte crescita economica con l'acquisto diretto (vi veda il progetto della Via della Seta) di credibilità internazionale, non ultimo per mezzo di finanziamenti a progetti infrastrutturali in quasi tutti i continenti, e segnatamente in Paesi in via di Sviluppo. Dopo una disamina sul ruolo dell'Unione Europea come *player* nel campo culturale internazionale per mezzo di quello che è unanimemente riconosciuto essere il suo progetto più riuscito, Erasmus, il focus viene quindi concentrato sull'Italia, cercando di rispondere alla domanda

se il prototipo che ha retto l'immagine della Penisola dal secondo dopoguerra a oggi, che è incentrato –principalmente- sulle 3 “F” di *food, furniture, e fashion*, sia superato o meno.

Esaurita questa disamina, la ricerca introduce il tema dell'internazionalizzazione del sistema universitario, passando da una indagine storica dell'evoluzione del fenomeno, a un'analisi di quali sono le sue costituenti peculiari, siano esse accademiche (si vedano i ranking), economiche (ad es., il flusso di capitali), politiche (la cooperazione internazionale), oppure socio-culturali (il tema dell'avvicinamento tra Paesi diversi *anche* attraverso la cooperazione accademica). Viene poi presentato un elenco di quelli che sono gli strumenti operativi, le scelte pratiche, che un'università adotta nel suo percorso di internazionalizzazione: dai doppi titoli, alla ricerca internazionale, dalla mobilità, al reclutamento di studenti stranieri. Proprio la ricerca dei cosiddetti *degree seeker* è assurta negli ultimi anni a pietra angolare dell'internazionalizzazione, probabilmente perché ricomprende al suo interno i principali tratti dell'internazionalizzazione stessa, dalla presenza di studenti stranieri in aula, all'incremento delle risorse a disposizione di un ateneo, fino alla possibilità di accrescere, per mezzo di campagne di comunicazione e di marketing, il *brand* internazionale di un'università.

Definito il perimetro di “internazionalizzazione accademica”, il lavoro considera quali sono gli attori che hanno come obiettivo “statutario” la ricerca di una sempre più pervasiva internazionalizzazione: chiaramente, le università stesse sono al centro del processo, così come lo sono le loro emanazioni “politiche” (si pensi ad esempio alle conferenze dei rettori). La ricerca opera una disamina approfondita di quelli che sono gli enti e le istituzioni che, a vario titolo, sono preposti all'internazionalizzazione, proponendo un elenco funzionale – sicuramente non esaustivo- delle soluzioni nazionali e internazionali individuate a tale fine.

1. Le agenzie nazionali governative
2. Le sub-agenzie
3. Le agenzie quasi-governative

4. Le agenzie nazionali indipendenti
5. Le associazioni nazionali indipendenti
6. I network e associazioni regionali di università
7. Le organizzazioni no profit regionali e nazionali
8. Gli enti regionali governativi

(Il termine “regionale” è qui utilizzato in senso anglosassone, ossia con riferimento a un ambito sovra-nazionale).

Al fine di individuare quali delle categorie sopra elencate risponda ai criteri ricercato nella tesi, che sono quelli legati al *branding* nazionale, la ricerca interpola alcuni elementi che caratterizzano l’azione degli enti stessi, e segnatamente: il livello di controllo da parte del governo, il modello di finanziamento, l’ambito geografico nel quale l’ente insiste, la *mission*, la *membership*, le l’eventuale coordinamento di programmi di terzi (ad esempio, il succitato Erasmus). Questo esercizio permette di restringere il campo della ricerca solamente alle agenzie che abbiano a) un livello sufficiente di controllo da parte dello stato nazionale dove si trovano a operare, b) siano funzionali alla proiezione del *Soft Power* dello stato e c) abbiano pertinenza e rilevanza per il processo di internazionalizzazione.

Ne emerge una tabella come di seguito configurata:

N	Modello	Controllo statale	Modello funzionale alla proiezione del soft power	Rilevanza per la ricerca
1	Agenzie Nazionali governative	100%	Si	Si
2	Sub-agenzie	51% - 99%	Si	Si
3	Organizzazioni quasi governative	25 – 50%	Si	Si
4	Organizzazioni Nazionali indipendenti	1 – 24%	Si	Si

5	Associazioni Nazionali indipendenti	Limitato	Limitato	No
6	Associazioni e network Nazionali di università	Limitato	Limitato	No
7	Organizzazioni no profit regionali e Nazionali con focus specifico sull'internazionalizzazione	Molto limitato	No	No
8	Enti regionali governativi	Molto limitato	No	No

La tabella permette una semplificazione, nel senso che elimina dalla ricerca le organizzazioni non funzionali ai fini della ricerca stessa, ossia quelle elencate dal punto 5 al punto 8, e mantiene le prime 4 della lista, contemporaneamente fornendo un modello, ancorché sicuramente limitato, di immediata operatività al fine di categorizzare le organizzazioni stesse in un'ottica di *Soft Power*.

Dopo aver inquadrato il tema di quello che è, o dovrebbe essere, l'output di una agenzia di internazionalizzazione, e aver definito le funzioni di *think-tank* delle agenzie stesse, la tesi definisce l'ambito precipuo dell'investigazione, articolato a sua volta in tre assi principali:

- a) L'agenzia come veicolo di promozione del sistema universitario
- b) L'agenzia come strumenti di *soft power*
- c) L'apertura e dinamismo

Ne emerge una tabella, di seguito riportata, che consente di introdurre nella ricerca una componente numerica, e quindi misurabile.

Strategia di internazionalizzazione	Se il ministero competente per l'università ha sviluppato una strategia dettagliata	0,2 punti
Presenza di un ente dedicato	Se è presente un organismo incaricato di promuovere l'internazionalizzazione	0,2 punti
Presenza di uffici esteri	Se sono attivi uffici esteri	0,2 punti

Presenza di accordi bilaterali	Se il ministero competente favorisce la strategia di internazionalizzazione tramite la stipula di accordi bilaterali	0,2 punti
Servizio di raccolta dati e monitoraggio	Se il governo, o il ministero competente, produce dati a supporto della strategia di internazionalizzazione del comparto universitario	0,2 punti

Questo, da punto di vista quantitativo. Dal punto di vista qualitativo, invece, lo studio propone uno strumento di analisi più dettagliato, che si articola sulla compilazione della seguente tabella.

N	Livello di analisi	Componenti
1	Mission	<ul style="list-style-type: none"> ▪ Se l'obiettivo primario dell'agenzia sia circoscritto all'università ▪ Se l'obiettivo primario dell'agenzia sia l'internazionalizzazione
2	Livello di controllo da parte del governo	<ul style="list-style-type: none"> ▪ Qual è il livello di controllo / coercizione da parte dello stato
3	Modello di finanziamento	<ul style="list-style-type: none"> ▪ Come si finanzia l'agenzia
4	Focus geografico	<ul style="list-style-type: none"> ▪ Se l'ambito di azione geografico è definito, e come ▪ Se l'agenzia ha sedi estere, e dove sono ubicate
5	Membership	<ul style="list-style-type: none"> ▪ Se la membership sia riservata alle università, o ai singoli
6	Gestione di programmi di alter agenzie	<ul style="list-style-type: none"> ▪ Se e in che misura l'agenzia gestisce programmi finanziati da terzi
7	L'agenzia come strumento di promozione del sistema universitario	<ul style="list-style-type: none"> ▪ Se e in che misura l'agenzia funzioni come strumento di promozione internazionale
8	L'agenzia come Strumento di proiezione del <i>soft power</i>	<ul style="list-style-type: none"> ▪ Se, e in che misura, lo stato è consapevole che l'agenzia operi con funzioni di emanazione di <i>soft power</i>
9	Strategia di internazionalizzazione	<ul style="list-style-type: none"> ▪ Da 0 to 1 punto ▪ <i>'British Council'</i> significa che la ricerca riporta il punteggio individuato dal BC

10	Posizionamento nell'indice Softpower30	<ul style="list-style-type: none"> ▪ <i>'Ricerca' significa che il punteggio è stato calcolato dal tesista</i> ▪ Se disponibile
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Vengono quindi analizzate l'organizzazione e l'output delle prime 4 categorie di agenzie per l'internazionalizzazione, alla luce dei punti 1-10 appena descritti, e lo fa prendendo in esame 20 casi nazionali (5 per ognuna delle 4 categorie) nell'impossibilità di prendere in esame tutte le agenzie per l'internazionalizzazione esistenti.

Chiaramente, la scelta è arbitraria. Tuttavia è importante rilevare che:

- a) non tutti gli Stati si sono dotati di un'agenzia per l'internazionalizzazione del sistema universitario, quindi il numero N potenzialmente ricercabile non è pari al numero N di Stati esistenti;
- b) non tutti gli Stati si sono dotati di un'agenzia che svolga esclusivamente il ruolo di promozione internazionale del sistema universitario;
- c) un'indagine su 20 casi nazionali è statisticamente rilevante;
- d) in ogni caso gli enti riconosciuti essere di riferimento per la comunità accademica internazionale (si pensi al DAAD, a Campus France, al Nuffic o al British Council), sono stati mappati.

Di seguito si presenta l'elenco delle agenzie oggetto dell'indagine. In alcuni casi (vedasi ad esempio il caso statunitense) gli enti preposti sono più di uno: si è quindi provveduto a mappare l'intero scenario. In altri, numerosi casi, all'agenzia è affiancato un portale (solitamente ricalcante la formula "Studi in..."), vero e proprio veicolo per la promozione internazionale di quel sistema-paese. Anche in questo caso la ricerca ha riportato entrambi gli strumenti.

- a) Le Organizzazioni Governative Nazionali
 1. Stati Uniti – ECA / EducationUSA / IIE
 2. Corea del Sud – NIIED / Study in Korea

3. Federazione Russa – L’iniziativa 5.100 / Russia.study
4. Australia – Austrade / Study in Australia
5. Svezia - Swedish Institute

b) Le Sub-Agenzie

1. Francia – Campus France
2. Estonia – Archimedes Foundation / Study in Estonia
3. Cina – China Scholarship Council / Study in China
4. Spagna – SEPIE / Study in Spain
5. Finlandia – EDUFI /Study in Finland

c) Le Organizzazioni Quasi-Governative

1. India – EdCIL / Study in India
2. Paesi Bassi – Nuffic / Study in Holland
3. Cile – Prochile / Learnchile
4. Taiwan – FICHET / Study in Taiwan
5. Regno Unito – British Council / GREAT

d) Le Organizzazioni Nazionali Indipendenti

1. Turchia – TUPA / YOK - Study in Turkey
2. Giappone – Jasso / Study in Japan
3. Italia – Uni-italia / Study in Italy
4. Austria – OeAD / Study in Austria
5. Germania – DAAD / Study in Germany

L’analisi nel dettaglio delle summenzionate componenti consente di articolare una valutazione numerica che tenga conto sia dei risultati in termini di internazionalizzazione per il sistema-paese che ospita l’agenzia, sia in termini di consolidamento del soft power.

Stato	Modello	Funzioni di Think-tank	Funzioni di branding	Consapevolezza Soft Power	Strategia di int.ne	Totale	Classifica Softpower30
Australia	Organizzazioni governative nazionali	1.00	1.00	0.75	1.00	3.75	9
Austria	Organizzazioni Nazionali indipendenti	0.75	0.50	0.25	0.75	2.25	16

Cile	Organizzazioni Nazionali indipendenti	0.00	1.00	1.00	0.50	2.50	/
Cina	Sub-agenzie	0.00	0.00	0.25	0.50	0.75	27
Estonia	Sub-agenzie	0.00	0.75	0.50	0.75	2.00	/
Finlandia	Sub-agenzie	0.75	1.00	0.75	0.75	3.25	15
Francia	Sub-agenzie	1.00	1.00	1.00	1.00	4.00	1
Germania	Organizzazioni Nazionali indipendenti	0.75	0.75	1.00	1.00	3.50	3
India	Organizzazioni quasi-governative	0.00	0.00	0.25	0.50	0.75	/
Italia	Organizzazioni Nazionali indipendenti	0.50	0.00	0.25	0.50	1.25	11
Giappone	Organizzazioni Nazionali indipendenti	1.00	0.75	0.75	1.00	3.50	8
Paesi Bassi	Organizzazioni quasi-governative	1.00	0.50	0.50	1.00	3.00	10
Federazione Russa	Organizzazioni governative nazionali	0.25	0.75	1	0.50	2.50	30
Spagna	Sub-agenzie	0.50	0.25	0.75	0.75	2.25	13
Svezia	Organizzazioni governative nazionali	0.50	1.00	1.00	0.50	3.00	4
Corea del Sud	Organizzazioni governative nazionali	0.00	0.75	1.00	0.50	2.25	19
Taiwan	Organizzazioni quasi-governative	0.25	0.75	0.25	1.00	2.75	/
Turchia	Organizzazioni Nazionali indipendenti	0.25	0.00	0.25	0.75	1.25	29
Regno Unito	Organizzazioni quasi-governative	1.00	1.00	1.00	1.00	4.00	2
Stati Uniti	Organizzazioni governative nazionali	1.00	0.50	1.00	0.50	3.00	5

Le conclusioni alle quali la ricerca perviene sono due.

1. Modello di agenzia vs. performance statale in ambito di internazionalizzazione

Sommando i punteggi delle 5 agenzie ricomprese in ognuna delle 4 categorie, si ottiene un punteggio di riferimento che consente di ordinare le categorie stesse.

Modello	Totale	Media
Organizzazioni Governative Nazionali	14.5	2.9
Sub-agenzie	12.5	2.5
Organizzazioni quasi governative	13.0	2.6
Organizzazioni Nazionali Indipendenti	11.75	2.35

La classifica ci dice che le Organizzazioni Nazionali Governative paiono essere quelle di maggior successo nell'internazionalizzazione dei rispettivi sistemi universitari. Parimenti, a mano a mano che il *grip* dello stato scende, ugualmente cala la performance delle agenzie. L'eccezione è rappresentata dalle Organizzazioni Governative Nazionali, ma le misurazioni relative a questa categoria risentono della performance negativa dell'agenzia cinese (il CSC), i cui indicatori non sono di facile reperimento.

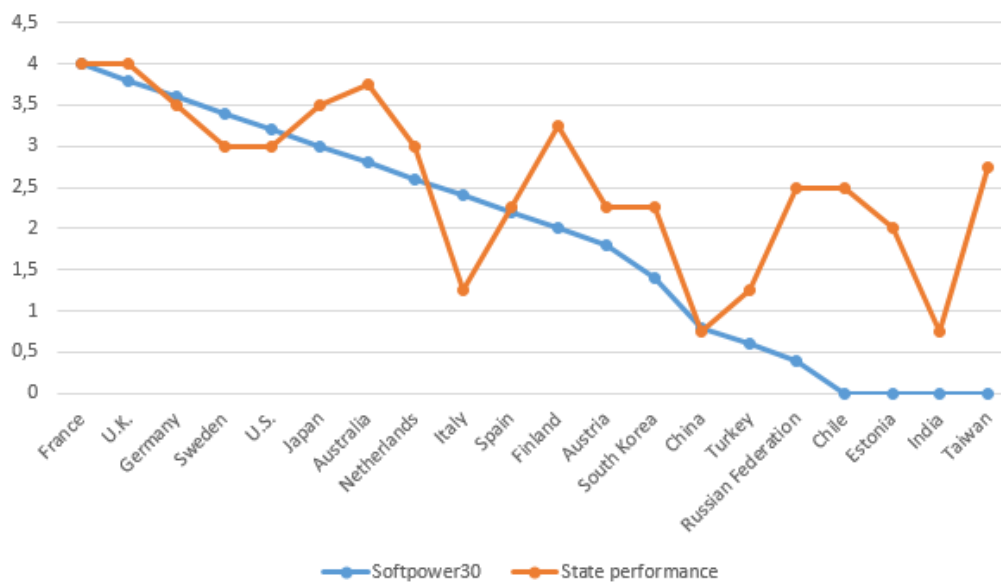
2. Performance vs. risultato nell'indice Softpower30

In questo caso si è voluto mettere in relazione il risultato di performance con l'indice di riferimento globale per il Soft Power, il softpower30.

In questo caso la correlazione appare evidente, nel senso che le agenzie più performanti sono ubicate negli Stati che performano meglio in questo indice. Chiaramente, vi sono delle eccezioni, che comunque risultano abbastanza agevolmente spiegabili. Ad esempio, l'Australia vanta risultati migliori nell'internazionalizzazione rispetto al *Soft Power* perché l'investimento delle

università australiane per l'internazionalizzazione è estremamente rilevante, come peraltro testimoniano i risultati medi nei ranking degli atenei australiani stessi.

Parimenti, l'Italia performa meglio in softpower30 che in internazionalizzazione, perché una delle componenti di softpower30 (l'indicatore "polling") non è metrico, ma deriva, appunto, da una rilevazione costruita su preferenze di singoli.



Ad ogni buon conto, il legame tra *Soft Power* e internazionalizzazione è straordinariamente immediato per alcuni statisti (si vedano ad esempio le dichiarazioni del Presidente francese Macron, riportate nella tesi, in tal senso), per cui le risultanze del presente studio collimano anche negli atti, oltre che nei fatti.

In altri casi, come ad esempio in quello italiano, il concetto di *Soft Power*, oltre a essere generalmente assente dal dibattito pubblico, tende a emergere in misura molto limitata nella narrativa nazionale legata all'internazionalizzazione dell'università.