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Public Opinion and the Evolving State

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Public Opinion and the Evolving State

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1. Introduction to the YouGov-Cambridge Forum, 2013

By Pieter van Houten and Joel Faulkner Rogers

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In 2011, the Department of Politics and International Studies (POLIS) at Cambridge University established a partnership with YouGov to facilitate collaboration between academic experts and opinion research professionals. The partnership's aim was to find innovative ways to use public opinion data within academic programmes, and to produce research that informs the public policy debate. From Cambridge University's perspective, it featured into an expanding focus, centred in POLIS, on teaching and research in politics, international relations and public policy. For YouGov, it was an opportunity to develop its already strong links with the academic community. In addition to ongoing research, the partnership has since developed a programme of annual conferences, both in London and Cambridge.

This partnership has proven to be very successful, generating research on a wide range of topics, initiated and analysed by staff and students from POLIS and other parts of the University, with examples including studies of political representation, climate change policy and foreign policy. Its conferences, meanwhile, have become a regular fixture for Cambridge academics to interact with opinion research professionals and practitioners from the public and private sectors.

We are, therefore, pleased that POLIS and YouGov have recently agreed to continue and extend their partnership through the YouGov-Cambridge Programme of Public Opinion Research.

This program will continue to encourage staff and students at Cambridge to use YouGov research, while YouGov professionals will contribute to some of the teaching programmes in POLIS, including the Master's Degree in Public Policy (MPP) launching at the University in October, 2013. We will also continue to organise conferences and forums.

This year's Forum is focused on the theme of *'Public Opinion and the Evolving State'.* Despite ideological and financial challenges to its role and power – for example from neoliberal ideas and austerity policies – the state remains a crucial feature of political and economic life. This is clear in the area of foreign policy and security affairs. It is equally true for economic affairs, such as government regulation of industries and the particular nature of state-business relations. This takes different forms around the world, from 'state capitalism' in countries such as Russia and China, to more complex and constantly evolving relations in Western Europe and the United States.

> *'How accountable – to parliaments and the public – should governments be in fulfilling their roles?'*

What are the public's views on the role of governments in security and economic affairs? How do these views vary between countries and competing models? Should the role of the state fundamentally change in certain areas? Will longer term challenges force it to do so? How accountable – to parliaments and the public – should governments be in fulfilling their roles? These are some of the questions that will be discussed on the first day of the Forum. The session on Friday morning focuses, as usual in this Forum, on the current state of British politics and prospects for the next election.

We offer a warm welcome to speakers and guests – and to our invaluable partners for this year's Forum: the *Guardian*, the *British Council* and the *Royal United Services Institute*. Thank you for your support and we look forward to two days of stimulating debate.

2. Report: British attitudes to Parliamentary oversight of foreign and security policy

By Peter Kellner and Joel Faulkner Rogers

Britain is in flux over the democratic accountability of foreign and security policy.

As this report went to print, minsters scrambled to reaffirm Western alliances while Downing Street recovered from its first defeat in a Commons vote on military action in modern times. Revelations continued about the surveillance powers of the state, along with accusations that some of these had evolved beyond effective democratic control. A quieter but simmering argument persisted between Whitehall and Westminster over the suitable guidelines and constraints for new forms of unmanned intervention where no war has been declared.

In research produced for this year's YouGov-Cambridge Forum on the role of the state, YouGov worked with academics, parliamentarians and former practitioners of the intelligence community to produce a report on British attitudes to the oversight of military action and the Intelligence Services.

Our findings suggest the public wants a larger role for Parliament in authorising military involvement – but this view has caveats. We see a clear preference for giving 'war powers' to Parliament in the formal declaration of war or in cases that threaten to fan the flames of conflict beyond the terms of humanitarian assistance, limited intervention and multilateral blessing. But people also support the principle of governments deciding on our behalf and see a need for ministers to act without Parliamentary approval in various scenarios, at least in the first instance.

Results on attitudes to the intelligence world suggest that James Bond and John le Carre hold sway for significant numbers of the public, who perceive a caricatured service that breaks the law with impunity, both at home and abroad. Our research also indicates there is all to play for in the battle for public opinion on surveillance. Sympathies for the whistle-blower Edward Snowden have declined over the summer, while the public looks divided on various dilemmas of security versus privacy.

Parliament's role: the state we're in

Historically, governments have employed the Royal Prerogative to send troops into action. Of course, Parliament has always had the power to bring down governments that fail. But in the past, it never voted directly on war itself. This is true even of the two most crucial Commons debates of the Second World War: on September 2, 1939, following Germany's invasion of Poland, and on May 7-8, 1940, which led to Neville Chamberlain's resignation.

'Our findings suggest the public wants a larger role for Parliament in authorising military involvement – but this view has caveats.'

On both occasions, the motion before MPs was to 'adjourn the House'. Likewise in April 1982, when the Commons held an emergency debate after the Argentinian invasion of the Falklands. Only since the decision to support the American-led invasion of Iraq in 2003 have MPs voted explicitly on such matters.
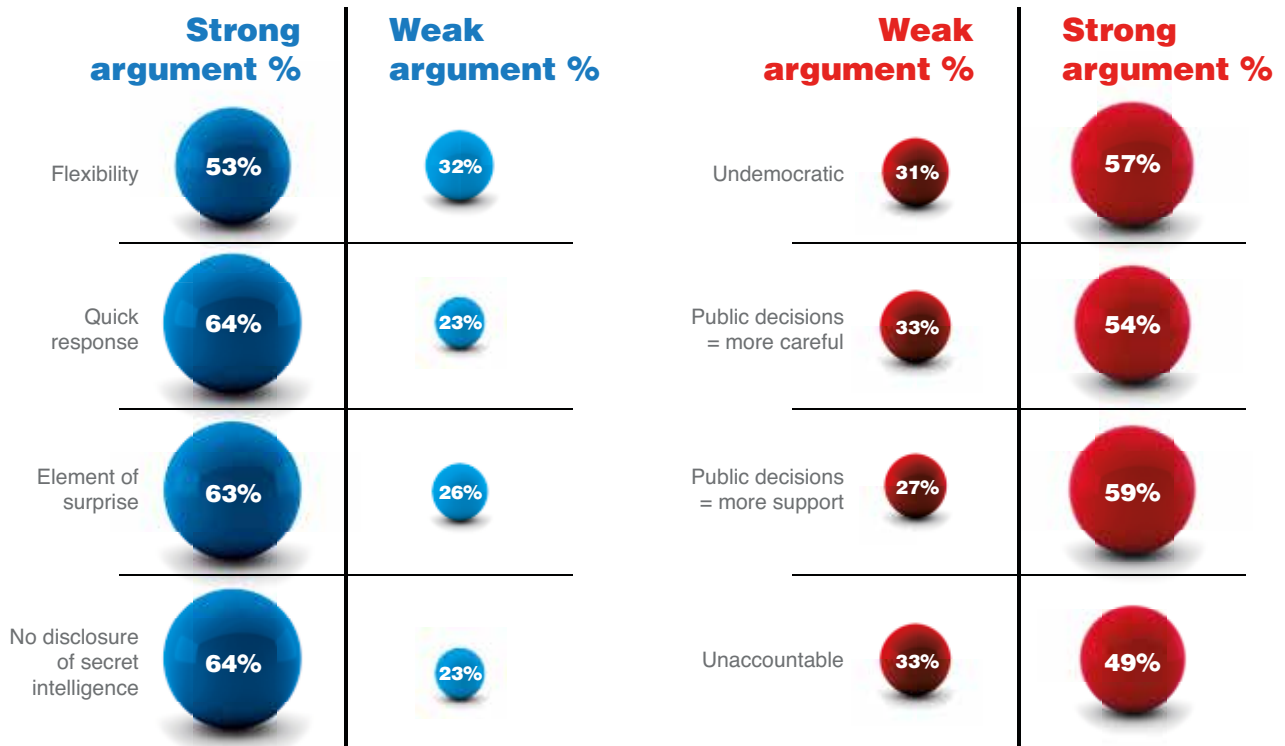
The old system looked odd, but it was flexible. The new system looks more sensible, but it raises the vital question of where to draw the line between those decisions that are properly left to ministers and those that should be made by Parliament – or even the wider electorate.

The advantages and disadvantages of current convention

We started by asking people to assess the advantages and disadvantages of decisions about war and peace being taken by ministers rather than Parliament. How strong are each of four reasons on the two sides of the argument? Three of the four advantages are considered strong by 63-64% of the public: the capacity to surprise an enemy, the ability to react quickly to events and the ability to use secret intelligence that cannot be disclosed. The case for political, diplomatic and military flexibility is regarded as strong by fewer, but still a narrow overall majority: 53%.

Figure 1. In each case, do you think this is a strong argument or a weak argument?

	Strong argument %	Weak argument %		Weak argument %	Strong argument %
Flexibility	53%	32%	Undemocratic	31%	57%
Quick response	64%	23%	Public decisions = more careful	33%	54%
Element of surprise	63%	26%	Public decisions = more support	27%	59%
No disclosure of secret intelligence	64%	23%	Unaccountable	33%	49%

Fieldwork was conducted online between 21-23 August, 2013, with a total sample of 1,948 British Adults. The data have been weighted and the results are representative of all British adults aged 18 or over.

Taken together, the average "strong" rating for the advantages was 61%. The average for the disadvantages was slightly lower: 55%. The figures ranged from 59% for the merit of going to war on the basis of an open and democratic vote, to 49% for Parliament being able to hold ministers to account if things go wrong.

The larger point is that, when the advantages and disadvantages are laid out, most people can see that the issue is far from simple.

We should not be surprised, then, that different circumstances provoke different responses as to how decisions should be taken.

The scale of democratic oversight

Respondents were asked how the nation should decide on a range of foreign policy actions, including:

- Declaring war on another country.

- Sending British troops into another country as part of an American-led operation not involving the North Atlantic Treaty Organisation (NATO).

- Sending British troops into another country as part of an agreed NATO operation.

- Taking military action that does not involve ground troops (e.g. the Royal Air Force helping to enforce a no-fly zone).

- Taking part in an American-led programme of unmanned 'drone' air attacks against groups in other countries accused of terrorism.

- Sending small groups of undercover commandos to help one side in a conflict not otherwise involving British troops.

- Responding to an urgent request by the United Nations (UN) to send British troops to stop genocide.

- Supplying arms to one side in a conflict not involving British troops.

- Selling arms to other countries not currently at war.

- Sending British troops as part of a UN peacekeeping force to prevent armed conflict from erupting.

- Sending humanitarian assistance to one side in a conflict not involving British troops.

In each case, they were given the following options for deciding on action, spanning a democratic scale from ministers acting entirely alone to following the current convention (highlighted below) to Parliament having ex post facto or full war powers and finally to the 'democracy max' option: a public referendum.

Answer options	Democratic scale
Decision should be taken by ministers alone, without involving Parliament.	*Zero involvement for Parliament*
Ministers should have the right to take the decision and choose when it is appropriate to consult Parliament.	*Current convention*
Ministers should have the right to authorise urgent action, but Parliament should have the power subsequently to instruct ministers when to stop.	*Ex post facto powers for Parliament*
Decision should be taken by Parliament before the action is taken.	*Full powers for Parliament*
Decision should be taken by a referendum of voters and no action taken for the two-three months it would take to set up and hold the referendum.	*Democracy max*

Declaring war and fanning flames: Parliament's call

The widest backing for Parliament rather than ministers deciding the matter is for declaring war against another country.

46% think this should be decided by Parliament and another 12% think it should be decided by a referendum. Just 12% think the issue should be left to ministers – either without involving Parliament at all (3%) or choosing when to consult MPs (9%).

A further 16% think ministers should have the power to take urgent action but that Parliament should then have the power to tell ministers when to stop.

Tables 1 and 2 list the main findings for all the circumstances we tested, which can arguably be categorised into two broad groups. In Table 1, we see a number of scenarios where the public shows a notable preference for giving full powers to Parliament to decide before any action is taken. These include: declaring war (46%), as mentioned above, along with supplying arms to one side in a conflict not involving British troops (41%); sending British troops into another country as part of an American-led operation not involving NATO (40%); selling arms to other countries not currently at war (38%); and taking part in an American-led programme of unmanned 'drone' air attacks (30%).

'We see a number of scenarios where the public shows a notable preference for giving full powers to Parliament to decide before any action is taken'

Table 1: On balance, taking account of the advantages and disadvantages of the different ways of deciding about military action, how do you think the following types of action should be decided?

	General Public %	Opinion Formers %
Declaring war on another country		
Zero involvement for Parliament	3	2
Current convention	9	13
Ex post facto powers for Parliament	16	16
Full powers for Parliament	46	62
Democracy max (referendum)	12	6
Don't know	13	1
Supplying arms to a conflict not inc British troops		
Zero involvement for Parliament	3	4
Current convention	8	14
Ex post facto powers for Parliament	17	28
Full powers for Parliament	41	49
Democracy max (referendum)	13	5
Don't know	18	2
Deploying troops with US but not with NATO		
Zero involvement for Parliament	3	2
Current convention	8	15
Ex post facto powers for Parliament	19	26
Full powers for Parliament	40	50
Democracy max (referendum)	13	7
Don't know	16	1
Selling arms to other countries not currently at war		
Zero involvement for Parliament	5	11
Current convention	10	16
Ex post facto powers for Parliament	14	25
Full powers for Parliament	38	40
Democracy max (referendum)	16	6
Don't know	17	3
Taking part in US drone programme		
Zero involvement for Parliament	6	7
Current convention	12	18
Ex post facto powers for Parliament	24	30
Full powers for Parliament	30	36
Democracy max (referendum)	10	7
Don't know	18	2

Fieldwork for the general population survey was conducted online between 21-23 August, 2013, with a total sample of 1,948 British Adults. The data have been weighted and the results are representative of all British adults aged 18 or over. Fieldwork for the 'Opinion Formers' survey was conducted online between 15-20 August, 2013 and administered to members of the YouGov 'Opinion Formers' panel, with a total sample of 432.

Table 2 outlines a second category of scenarios where the percentage of those preferring to give full powers to Parliament falls more evenly with, or below, the figure for those willing to give ministers the right to authorise action *in the first instance,* followed by ex post facto powers for Parliament to call a stop.

These include: sending humanitarian assistance to one side in a conflict not involving British troops (28% full powers/ 26% ex post facto); sending British troops as part of a UN peacekeeping force to prevent armed conflict from erupting (27% full powers/ 31% ex post facto); sending British troops into another country as part of an agreed NATO operation (26% full powers/ 30% ex post facto); taking military action that does not involve ground troops (24% full powers/ 30% ex post facto); and responding to an urgent request by the UN to send British troops to stop genocide (22% full powers/ 32% ex post facto).

'In other words, respondents lean towards giving full powers to Parliament in authorising war or military involvement beyond multilateral commitments, keeping the peace and sticking to the air.'

'The Prime Minister appears to have lost public support because of his handling of this particular crisis, not because voters rejected the principle of governments acting on our behalf.'

In other words, respondents lean towards giving full powers to Parliament in authorising war or military involvement beyond multilateral commitments, keeping the peace and sticking to the air. But they also recognise a need for ministers to act without Parliament's word, at least in the first instance, particularly in cases involving humanitarian urgency, secrecy or multilateral intervention.

In light of the recent debate on air strikes against Syria, it is also notable that our poll (conducted shortly before the recent Commons debate) found that 55% thought ministers should have the right to authorise at least the initial military action when no ground troops are involved, while just 29% want the decision to be taken by Parliament (24%) or a referendum (5%). The Prime Minister appears to have lost public support because of his handling of this particular crisis, not because voters rejected the principle of governments acting on our behalf.

'This is NOT one of those subjects on which opinion formers and the wider public fundamentally differ.'

YouGov put the same question to its panel of 'Opinion Formers', including business leaders, politicians, journalists and key figures in think tanks, charities and trade unions. As the tables show, its views tend to chime with those of the general public. This is NOT one of those subjects on which opinion formers and the wider public fundamentally differ.

Table 2: On balance, taking account of the advantages and disadvantages of the different ways of deciding about military action, how do you think the following types of action should be decided?

	General Public %	Opinion Formers %
Humanitarian support in a war not inc British troops		
Zero involvement for Parliament	7	10
Current convention	14	24
Ex post facto powers for Parliament	26	39
Full powers for Parliament	28	24
Democracy max (referendum)	8	2
Don't know	16	2
Deploying troops with UN to prevent armed conflict		
Zero involvement for Parliament	6	6
Current convention	16	25
Ex post facto powers for Parliament	31	38
Full powers for Parliament	27	27
Democracy max (referendum)	6	2
Don't know	14	1
Deploying troops with NATO		
Zero involvement for Parliament	7	7
Current convention	17	24
Ex post facto powers for Parliament	30	37
Full powers for Parliament	26	28
Democracy max (referendum)	6	3
Don't know	14	2
Military action not inc troops (e.g. no-fly zone)		
Zero involvement for Parliament	6	6
Current convention	19	24
Ex post facto powers for Parliament	30	40
Full powers for Parliament	24	27
Democracy max (referendum)	5	2
Don't know	16	2
Deploying troops with UN to stop genocide		
Zero involvement for Parliament	10	10
Current convention	18	23
Ex post facto powers for Parliament	32	46
Full powers for Parliament	22	19
Democracy max (referendum)	4	2
Don't know	14	0
Deploying small, covert units not inc regular troops		
Zero involvement for Parliament	13	17
Current convention	18	29
Ex post facto powers for Parliament	27	36
Full powers for Parliament	19	15
Democracy max (referendum)	5	2
Don't know	18	1

Fieldwork for the general population survey was conducted online between 21-23 August, 2013, with a total sample of 1,948 British Adults. The data have been weighted and the results are representative of all British adults aged 18 or over. Fieldwork for the 'Opinion Formers' survey was conducted online between 15-20 August, 2013 and administered to members of the YouGov 'Opinion Formers' panel, with a total sample of 432.

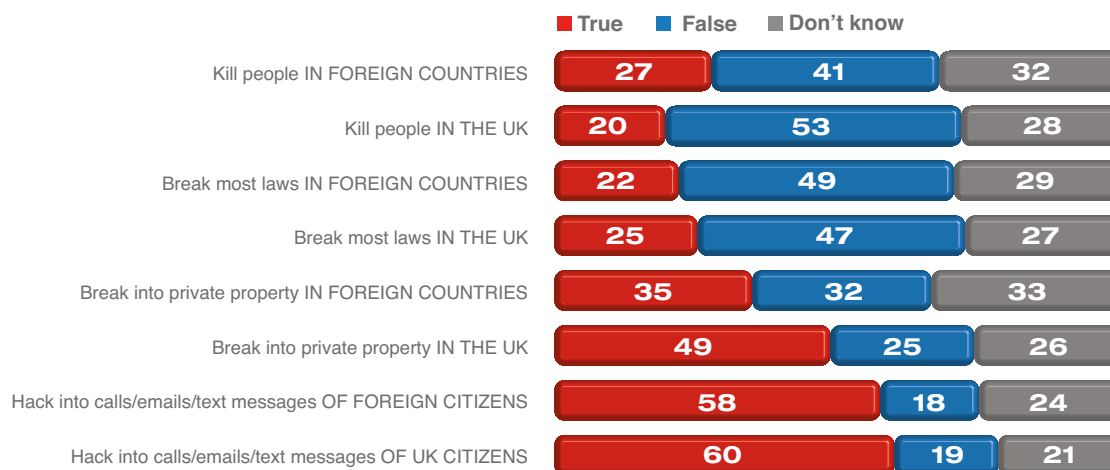## The Intelligence Services: true/false versus should/should not

A separate but linked issue concerns our Intelligence Services. Their work played its part in the build-up to the Iraq War ten years ago. Controversy lingers over whether they provided faulty analysis or whether cautious advice was over-egged by Tony Blair.

More recently, we have had the revelations by Edward Snowden, a former contractor for the United States National Security Agency (NSA), about the surveillance work of the British and American Intelligence Services. This, of course, comes after fifty years of James Bond films – not to mention the transition from just a generation ago, when the existence of the Services was never formally acknowledged to today, when MI6 is based in one of London's most iconic modern buildings and advertises publicly for applicants.

What, then, does the public make of what these services do today? We tested ten possible activities and asked a) whether the intelligence services ACTUALLY do them; and b) whether they SHOULD do them.

Figures 2, 3 and 4 show the main findings. Apart from accounting to Parliament, all the activities we list are technically illegal. However, millions of people believe that each of these things are allowed to happen in practice.

Figure 2. The UK Intelligence Services are allowed in some circumstances to [......] with no questions asked by other parts of the UK and government.

	True	False	Don't know
Kill people IN FOREIGN COUNTRIES	27	41	32
Kill people IN THE UK	20	53	28
Break most laws IN FOREIGN COUNTRIES	22	49	29
Break most laws IN THE UK	25	47	27
Break into private property IN FOREIGN COUNTRIES	35	32	33
Break into private property IN THE UK	49	25	26
Hack into calls/emails/text messages OF FOREIGN CITIZENS	58	18	24
Hack into calls/emails/text messages OF UK CITIZENS	60	19	21

Figure 3. The UK Intelligence Services SHOULD BE allowed in some circumstances to [......] with no questions asked by other parts of the UK and government.
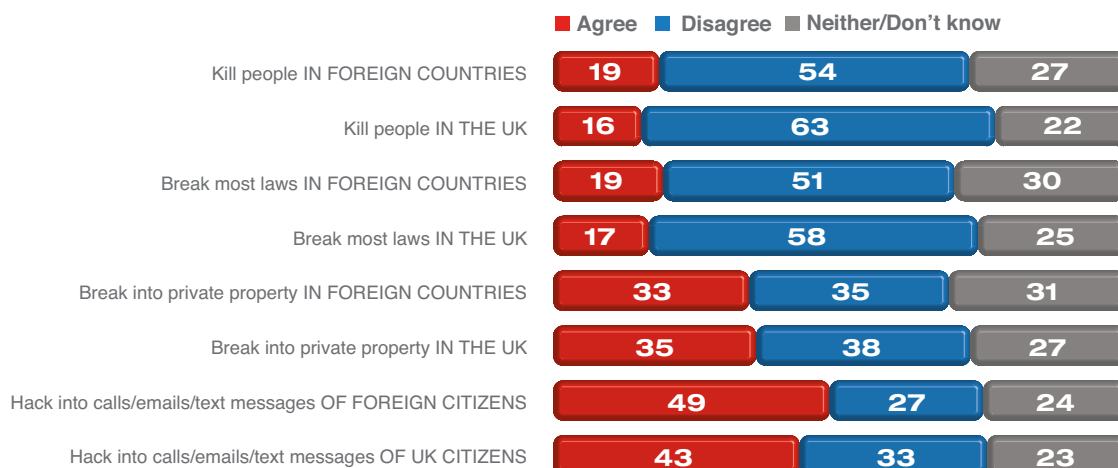
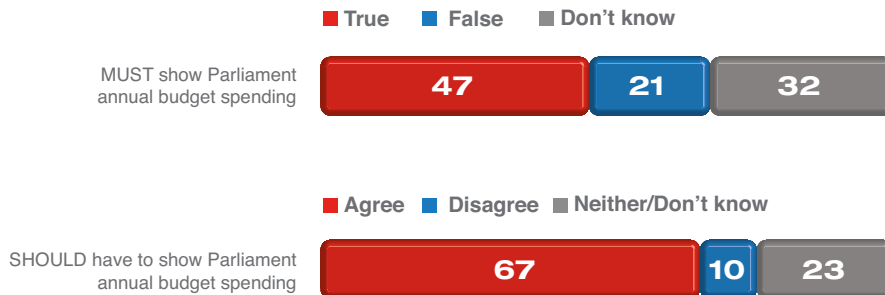|	Agree	Disagree	Neither/Don't know
Kill people IN FOREIGN COUNTRIES	19	54	27
Kill people IN THE UK	16	63	22
Break most laws IN FOREIGN COUNTRIES	19	51	30
Break most laws IN THE UK	17	58	25
Break into private property IN FOREIGN COUNTRIES	33	35	31
Break into private property IN THE UK	35	38	27
Hack into calls/emails/text messages OF FOREIGN CITIZENS	49	27	24
Hack into calls/emails/text messages OF UK CITIZENS	43	33	23

Figure 4. The UK Intelligence Services [......]

Fieldwork was conducted online between 21-23 August 2013, with a total sample of 1,948 British adults. The data have been weighted and the results are representative of all British adults aged 18 or over.

The proportions range from 20% who think that intelligence officers 'are allowed in some circumstances to kill people in the UK with no questions being asked by other parts of the UK government' to 60% who think that GCHQ 'is allowed to hack into the private phone calls, emails and text messages of UK citizens with no questions asked by other parts of the UK government'.

When we repeated the same list and asked in each case what SHOULD happen, the figures go down – though not all that much. (Once again, parliamentary scrutiny provides the exception, with the proportion saying this should be done going up, to 67%.) For example, although almost two people in three reject the notion that intelligence officers should be allowed 'in some circumstances' to kill people in the UK, one person in six disagrees. That means seven million adults want the intelligence services to have this power.

All to play for in the battle for public opinion on surveillance

Given recent coverage of the Snowden leaks, it is no surprise that when asking what people currently believe is allowed, the highest figures for answering 'true' came in response to suggestions that the Intelligence Services can hack into the private communications of UK and foreign citizens (60% and 58% respectively) with no questions asked.

But it might surprise some that in the following question, the figures for those saying these activities *should be* allowed remain notably high compared with other items – 43% for hacking into communications of UK citizens and 49% for foreign citizens.

These attitudes correlate to some extent with YouGov polling from the summer, where the public looks divided over the PRISM controversy, with a slightly higher figure of 46% saying they are pleased the UK security services are getting information that might help them track down criminals and terrorists, compared with 39% saying they are sorry that UK agencies might be getting round British law to undermine our right to privacy.

Similarly in a YouGov poll of British attitudes to the Snowden leaks in early June, 42% said 'the security forces should be given more investigative powers to combat terrorism, even if this means the privacy or human rights of ordinary people suffers'. Another 29% said 'the current balance between combatting terrorism and protecting the privacy and human rights of ordinary people is about right', while 11% preferred to say they 'Don't know'. By comparison, less than a fifth (19%) said 'more should be done to protect the privacy and human rights of ordinary people, even if this puts some limits on what the security forces can do when combatting terrorism'.

> *'Findings suggest there is all to play for in the battle for public opinion over the right of police and security agencies to access mobile phone, email and social media records.'*

So findings suggest there is all to play for in the battle for public opinion over the right of police and security agencies to access mobile phone, email and social media records. As for the whistle-blower himself, impressions of Snowden shifted negatively between the two polls: 38% said they had a positive impression of him in June versus 25% saying they had a negative impression. In our August survey, these figures shifted to be near even, with 35% positive versus 34% negative.

Admittedly, following a summer of revelations on US and UK surveillance programmes, repeat polling in late August showed a perceptible fall in the percentage wanting more investigative powers for security forces, from 42% to 31%. But figures stayed roughly the same for those saying more should be done to protect privacy (19% in June/ 22% in August) or the current balance is about right (29% in June/ 30% in August), while the number of 'Don't knows' climbed from 11% to 17%.

Once again, the views of influentials broadly chime with those of the public – though only 6% of YouGov's Opinion Formers panel want agents to be able to kill people inside Britain, compared with 16% of the general population.

'One reason why the public has been told more about our intelligence agencies in recent years has been to provide an alternative perspective to those provided by Bond films and spy novels.'

One reason why the public has been told more about our intelligence agencies in recent years has been to provide an alternative perspective to those provided by Bond films and spy novels. The evidence from our survey suggests that this effort has been only partially successful.

Peter Kellner is the President of YouGov.

Joel Faulkner Rogers is the Academic Director at YouGov.

3. Report: Cross-country attitudes to ownership and competition

By Peter Kellner

'Around the world, privatised companies have increasingly dominated the provision of goods and services – even the basic utilities that used to be state-owned.'

For almost two decades – from the fall of the Berlin Wall in 1989 to the collapse of Lehman Brothers in 2008 – the great ideological struggles of the 20th Century seemed to be over. Capitalism won. Governments were thought to be hopeless at running the main enterprises of modern economies. Around the world, privatised companies increasingly dominated the provision of goods and services – even the basic utilities that used to be state-owned. Market forces were deemed to hold the key to prosperity.

Since 2008, confidence in the infallibility of markets has been shattered. The banking crises and recession that afflicted the United States and much of Europe have been the immediate cause; but there have been other signs of trouble, from the collapse of Enron in the United States to the growing gulf between rich and poor in most market economies.

Take all these things together, and a new anxiety has revived an old question, albeit it a more nuanced form than in the 20th Century: what is the proper balance between public and private ownership – and what role should competition and government regulation play? The extremes of state socialism and laissez-faire markets have both been discredited; one of the challenges of the 21st century is to choose the proper locations for economic activity somewhere – but where? – between these two extremes.

'What is the proper balance between public and private ownership – and what role should competition and government regulation play?'

What do the people – the workers and consumers – think? The YouGov-Cambridge research reported here has measured public attitudes to ownership and competition in Europe, the United States, China and the Arab and Islamic worlds.

In broad terms, around 40% in each of the countries we surveyed hold an 'ideological' view – either that Government interferes too much or should give private companies less freedom to take their own decisions. In each country, the largest group want either to keep the present level of regulation or a pragmatic case-by-case approach to regulation. (This was the one question we did NOT pose in China.)

'Support for a greater government role is more even across the countries we surveyed – around 20% in each case.'

As Table 1 shows, support for the laissez-faire option is highest in the United States (US) and lowest in Sweden; but even in the US, it has the backing of just 31%. An equal number favour a case-by-case approach. Support for pragmatism is especially strong in Germany (43%) and Britain (39%.)

Support for a greater government role is more even across the countries we surveyed – around 20% in each case.

Table 1: In general, which of these views comes closest to yours about private business in [COUNTRY]?

	GB %	France %	Germany %	Sweden %	US %	MENA* %	Pakistan %
The government interferes too much in business. [COUNTRY] would be more prosperous if private companies had more freedom to take their own decisions	17	23	15	12	31	16	17
Left to themselves, private companies are liable to act irresponsibly and anti-socially; the government should do more to regulate them and ensure that they behave well	20	22	22	24	17	23	20
The current amount of regulation of business by the government is about right in [COUNTRY]	11	5	8	13	7	10	9
The issue is not whether there is too much or too little regulation, but whether it is done intelligently and effectively. What is needed is a practical, case-by-case approach	39	27	43	34	31	32	38
Don't know	13	23	13	18	13	20	16

* Middle East and North Africa. See end of report for methodology.

How, though, do people want each industry to be owned and regulated? Table 2 shows the level of support for partial or complete government ownership. Not surprisingly, the United States stands out as the country that likes it least. This reflects not only the different nature of its internal political debate – "socialism" has been a dirty word for many decades – but the lack of past experience of government ownership in the sectors covered by our survey. In Europe, privatisation has been widespread, but we do not need to delve too far back into our history to find the days when our railways, airlines and energy companies were state-owned.

As for sectors that have traditionally been the preserve of private companies, the appetite for nationalisation has all but disappeared in Britain, Germany and Sweden. On the other hand, a significant minority of French people still subscribe to the religion of state socialism for the supply of goods and services.

This is also true of the Islamic world, with its more complex relationship between capitalism, especially banking, and the Koran.

Perhaps the most striking results concern China. In a country that describes itself as Communist but which practices its own brand of capitalism, the division in attitudes is very similar to that across Europe, with around half the public wanting hospitals, banks and energy and transport companies in partial or complete government ownership, but only a minority wanting companies providing consumer goods and services in the hands of the state.

'The appetite for nationalisation has all but disappeared in Britain, Germany and Sweden.'

Table 2: Which form of relationship would you most like to see for each industry?

Support for complete or partial government ownership	GB	France	Germany	Sweden	US	China	MENA*	Pakistan
	%	%	%	%	%	%	%	%
Hospitals	63	52	40	66	15	49	45	48
Railway system	48	46	40	63	16	55	49	49
Electricity companies	38	47	38	44	15	54	54	45
Major banks	20	42	33	31	12	53	40	34
Major airlines	10	36	17	22	10	47	42	37
Car manufacturers	6	26	8	8	6	23	27	22
Companies making consumer goods	5	20	8	6	6	17	29	20
Newspapers	5	15	7	6	5	29	25	21
Hotels and restaurants	4	15	6	4	4	13	21	14

* Middle East and North Africa. See end of report for methodology.

However, where Chinese people do not want state ownership, they DO want strong regulation rather than private owners left to make their own decisions, subject only to light regulation and the laws of the land. Only 11% of Chinese respondents want car manufacturers that are largely free of government regulation. The figures are slightly higher for companies making consumer goods (13%), newspapers (14%) and hotels and restaurants (16%), but they are still generally far lower than those in Europe or the United States.

China's continuing appetite for state regulation shows up in answers to another question about how decisions should be taken when the public interest is invoked. We asked:

Table 3: In general, when specific actions are taken by, or on behalf of, the government in relation to different industries (for example whether to approve a merger, or major investment, or planning proposal), how should the main decisions be taken?

How state decisions on business should be taken	GB	France	Germany	Sweden	US	China	MENA*	Pakistan
	%	%	%	%	%	%	%	%
By government ministers / elected politicians, judging what is best at the time	19	18	10	15	16	46	33	28
By people appointed by the government but acting independently according to clear and objective rules	63	62	75	64	59	46	44	59
Don't know	18	20	16	21	24	8	23	13

* Middle East and North Africa. See end of report for methodology.

Across Europe and the United States, and also Pakistan, most people want the independent application of objective rules. But in China, attitudes are evenly divided. Perhaps if either the Government or a system of independent decision could demonstrate a capacity for honesty and efficiency, it would command clear majority support.

Finally, we explored attitudes to competition. As we have discovered in recent decades, privatisation does not always banish monopolies or produce fully competitive markets. And, in theory at least, it is possible for rival enterprises to be state-owned and still fiercely competitive. So we repeated our list of industries and asked:

Table 4: Different people have different views about the role of competition in different industries – whether, and how far, it is a good thing because it stimulates innovation, provides choice and keeps prices down – and whether, and how far, it leads to lower standards, worse employment conditions and the wrong kind of cost-cutting. For each of the following industries, do you think there should be more competition, less competition, or is the current level of competition about right?

	GB	France	Germany	Sweden	US	China	MENA*	Pakistan
Support for more competition	%	%	%	%	%	%	%	%
Electricity companies	47	45	52	40	54	39	56	69
Major banks	45	41	42	50	47	59	56	56
Railway system	37	42	54	31	41	37	55	69
Major airlines	33	36	29	30	48	54	66	75
Companies making consumer goods	31	38	29	35	43	60	63	69
Car manufacturers	28	31	26	28	36	62	60	73
Newspapers	27	27	24	31	38	40	47	44
Hotels and restaurants	25	31	26	29	30	59	59	63
Hospitals	20	21	26	19	39	48	60	57

* Middle East and North Africa. See end of report for methodology.

As our results show, the appetite for greater competition is widespread across most countries and most industries. China and Pakistan produce some of the highest figures. This partly reflects their current condition, in which competition is less common and less well established than in Europe and the US. But it is striking that, in very different kinds of society, support for competition often outstrips enthusiasm for laissez faire private enterprise.

In almost every case, few people see merit in LESS competition. The only sector in which less competition has more adherents than more competition is hospitals; and this exception applies only to Europe: Britain (less competition: 33%, more competition 20%), France (29-21%), Germany (30-26%) and, most emphatically of all, Sweden (40-19%). Most of the time, those who do not favour more competition tend to favour the status quo rather than less competition. (Thus one reason why so few people in Europe and the US favour more competition for hotels and restaurants is that the status quo is already highly competitive.)

'As our results show, the appetite for greater competition is widespread across most countries and most industries. China and Pakistan produce some of the highest figures.'

Overall, the results of our survey suggest that the advocates of the market system have won the basic argument: most people in all the countries we surveyed want large doses of competition across most sectors of the economy – hospitals in Europe being the one exception among the nine sectors we tested. However, it is clear that there are also widespread concerns about the way governments and private companies behave. For many people in many countries, the ideal is a more competitive economy, with a variety of forms of ownership and smarter, but not more onerous, forms of independent regulation.

These are concepts that resist simple slogans or clear-cut ideologies. Most people nowadays reject the grand theories and great Left-Right struggles of the last century. Rather, we want practical solutions to complex problems – honesty and competence more than anger and vision. Maybe it is time to reach back to William Blake's words from two centuries ago: "He who would do good to another must do it in minute particulars: general good is the plea of the scoundrel, hypocrite and flatterer."

Peter Kellner is the President of YouGov.

'Most people nowadays reject the grand theories and great Left-Right struggles of the last century. Rather, we want practical solutions to complex problems – honesty and competence more than anger and vision.'

For more information on methodology or results, please email: info@yougov.com

4. Report: British attitudes to the pharmaceutical industry

By Oliver Rowe

The reputation of the pharmaceutical industry in Britain is generally positive among the public, owing to the economic benefits it provides. But it suffers from a trust deficit. There is scepticism of the industry's motives and concern that its goals are misaligned with the public need. Low familiarity of the industry is matched by low awareness of recent sector issues, including fines, job cuts and ongoing investigations.

What matters more in the public view is a perceived focus on profit and the possible implications of this, such as overcharging the National Health Service (NHS), collusion with doctors and a lack of transparency in drug trials. Accordingly, as the industry moves from being a supplier to a partner, any perceived mismatch of commercial agendas and the public interest could present new reputational risks.

"Clearly a challenging time for the industry and politicians. What can we realistically expect in the future from society's investments and expenditures on healthcare industries generally? A political hot potato, but re-assessing those expectations (in the form of a national debate, perhaps?) seems timely to me."

- Male, aged 59, South West England

Familiarity versus favourability

The pharmaceutical industry is not a sector that the British public claims to know much about. Just 9% of the public say they are familiar with it, which is comparable with the oil and gas or soft drink sectors. Despite a low level of familiarity, it enjoys relatively good levels of favourability, with 34% saying they feel positive about the industry, on a par with the travel and leisure sectors.
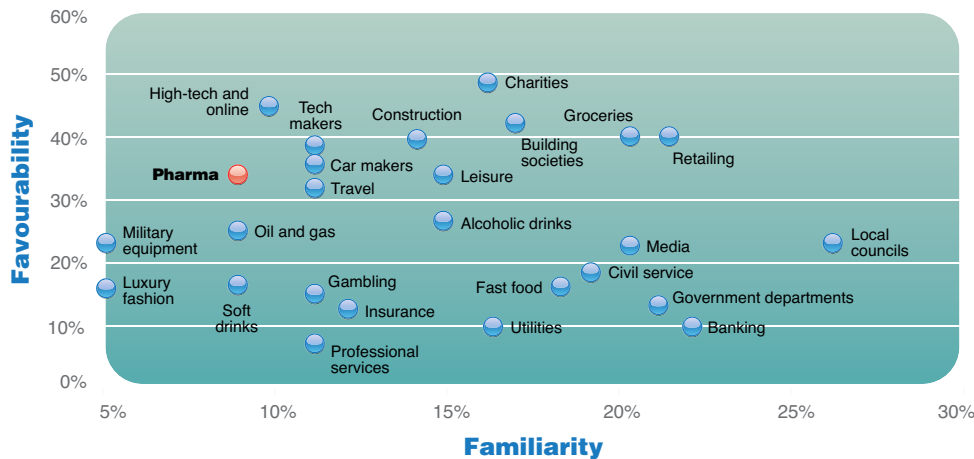
"It saves lives and is an extremely profitable industry which brings in billions to the UK economy."

- Male, aged 50, West Midlands

"Our pharmaceutical industry leads the world."

- Male, aged 59, East of England

Figure 1. Familiarity vs Favourability: Industry comparison.

Source: YouGov, representative sample of 4,034 GB adults, August 2013.

The low levels of familiarity of the industry overall clearly impact the awareness of individual pharmaceutical companies. Although 86% correctly identify that GSK works in the industry, only 53% can do the same for Pfizer and just 40% for AstraZeneca.

There is also low awareness of many of the largest reputation-impacting developments in the industry. When prompted, 20% claim to have heard of GSK's recent issues in China and just 14% are aware of the company's €3 billion fine in the United States in 2012. 14% say they recall Pfizer shutting its facility in Sandwich, Kent, while 11% claim to remember that AstraZeneca announced the closure of its Alderley Park site. More positive stories about links with NGOs or low drug prices show even more limited recall. Open ended comments in the survey point instead to continuing concern for many about the lack of transparency and openness on drug trial results.

"I don't believe that pharmaceutical companies are honest and [they] cover up unfavourable research."

- Male, aged 64, South of England

"I am shocked at the lack of publicity given to the dodgy practices of some members of our pharmaceutical industry. There should be more public awareness of how the industry works."

- Female, aged 75, East of England

Figure 2. Public awareness of developments among UK pharma companies.

Statement	Percentage
GlaxoSmithKline (GSK) has said some of its senior executives in China appear to have violated the law, following accusations of bribery by Chinese authorities.	20%
In 2012 the pharmaceutical company GlaxoSmithKline (GSK) was fined $3 billion for fraud in its US sales and safety reporting activity.	14%
Pfizer scaled down its research and development facility in Sandwich, Kent with the reported loss of about 1,500 jobs.	14%
The pharmaceutical company GlaxoSmithKline (GSK) is currently being investigated by the Office of Fair Trading for paying competitive companies to hold off making versions of its Seroxat drug which was coming out of patent.	11%
AstraZeneca is closing its Alderley Park office in Cheshire and moving to Cambridge but it is reported that 700 jobs will go, as part of 11,000 jobs which have gone globally over the past year or two at the company.	11%
GlaxoSmithKline (GSK) has partnered with Save The Children (STC) so that GSK supports various STC child health initiatives in Africa while STC will be part of GSK's new paediatric research & development board	4%
Novartis have teamed up with non-profit Malaria No More to help speed up the elimination of Malaria worldwide. In total Novartis have delivered 600 million malaria treatments without profit.	4%
The UK has among the lowest prices for medicines in Europe and the percentage of NHS expenditure on branded medicines is falling, down to 7.2% per year by 2015, though the actual cost is rising slightly (according to the Office for Health Economics).	6%
Not sure.	14%
None of them.	47%

Source: YouGov, representative sample of 4,034 GB adults, August 2013.

The pharmaceutical industry is also viewed as an important part of the UK economy.

It ranks sixth out of 25 sectors in terms of perceived importance to the success of overall UK economic growth, behind Construction, Banking, Retail, Oil and Gas, and Hi-tech, and just ahead of Car Manufacturing. This view is supported by 54% of the public agreeing that "we must protect the UK's pharmaceutical industry as it is an important source of taxes, jobs and export revenue." Just 6% of respondents disagreed with this statement. Agreement rises to 62% amongst members of our Opinion Formers panel.

"This industry is critical to the economic prosperity of the UK and must be actively supported by government."

- Male, aged 59, London

On balance, the pharmaceutical industry has a good reputation though its perception is not overwhelmingly positive. It has a net positive reputation of 17%, putting it in the middle of the pack of our 25 industries, but way ahead of banking on -61% and behind tech manufacturers on +47%. It is an industry whose reputation is relatively static. 13% think it is 'getting worse', 11% say 'getting better' and the rest either see no change or just 'don't know'. Despite this, as we see in the next section, the industry is viewed as innovative.

Figure 3. Net reputation of industries % good minus % bad.
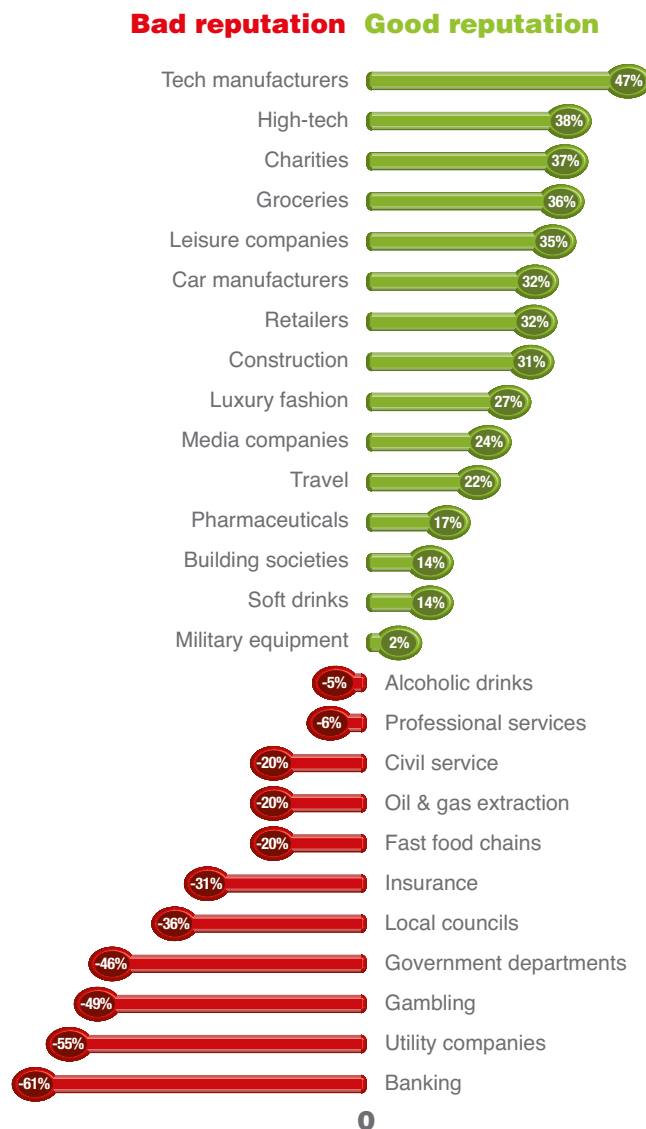
Source: YouGov, representative sample of 4,034 GB adults, August 2013.

A third (33%) of respondents say they would be proud to work in the sector, while only 5% claim they would be embarrassed. This compares unfavourably to Hi-tech in first place with 41% saying 'proud', but favourably to Gambling in last with 47% saying embarrassed.

Socially useful but maybe not trustworthy

Improving people's lives and being socially useful is where the industry scores well, with half the public associating 'social usefulness' with the sector. This matches the level of association it receives for being 'globally successful' (50%), and for being innovative (48%). 43% go on to endorse the industry as producing 'high quality products and services'.

Despite these scores, fewer than 1 in 5 say the industry is 'trustworthy' or has 'high ethical and moral standards', though it should be noted that these scores are higher than most industries achieve for these measures— and well ahead of banking, which currently suffers from significant public mistrust. It may be that the low score for 'cares what people like me think of it' provides an insight into why the public does not trust even an industry like pharmaceuticals, which it tends to think 'improves people's lives and is socially useful' – that the industry is not outward looking, or seen to communicate its values or ethics with the public.

Certainly the fact that only 32% of the public feel able to agree they are "confident the UK's pharmaceutical companies comply with government regulations", while 19% disagree and 48% are on the fence, hints at the uneasiness surrounding the industry.

"I know little about [pharmaceutical companies], and have to admit a certain suspicion as to [their] motives and actions."

- Female, aged 69, East Midlands

"I have heard that a pharmaceutical company had withheld results of drug testing, promoting it to doctors, [and stating] that it worked when it did not. If this is true, it would question both its ethical and legal conduct, as well as preventing me from trusting what I may be given."

- Female, aged 22, Yorkshire/Humberside

"UK firms are more trustworthy than foreign or EU companies."

- Female, aged 43, South West England

Figure 4. Attitude agreement – UK industries % agree or agree strongly.
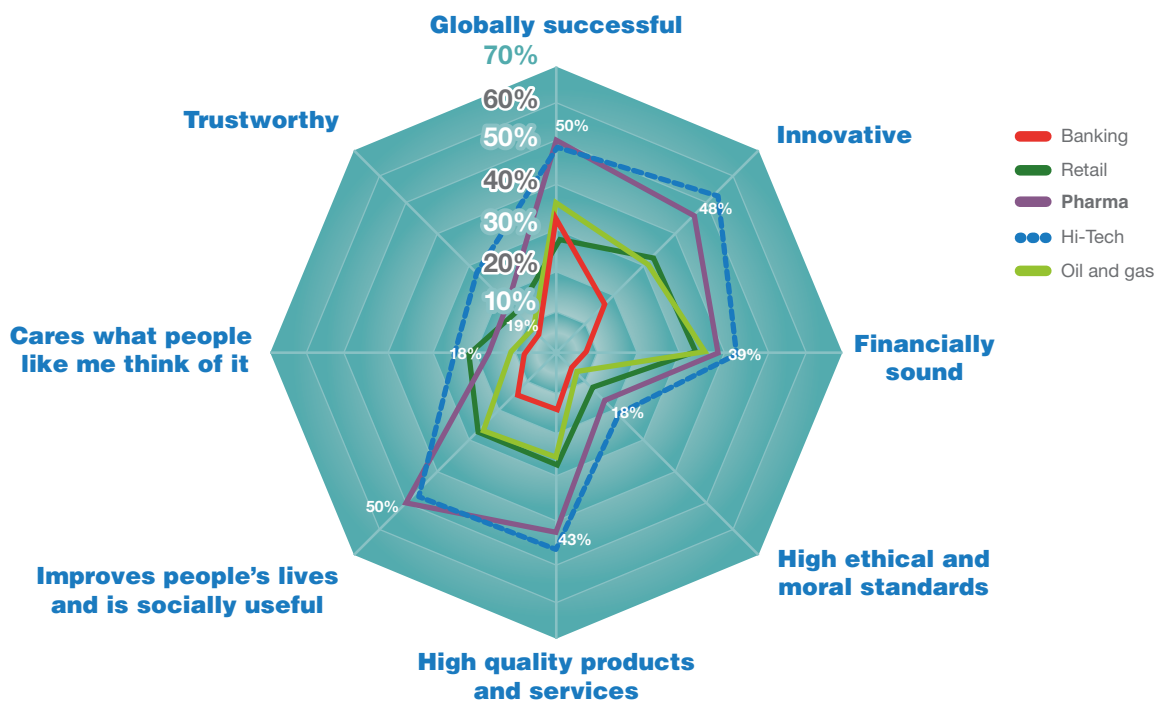
Source: YouGov, representative sample of 4,034 GB adults, August 2013.

On the topic of being trustworthy, it is interesting to note that 43% of UK MPs polled for this report say the pharmaceutical industry is trustworthy while just 9% say it is not. This compares very favourably to banking (19% trustworthy, 32% not), in line with oil and gas (38% vs 6%) and construction (40% vs 4%). 81% of MPs also say the industry is important to the UK economy, alongside banking, oil and gas, and construction.

Specific attitudes: profit versus ethics

Where the most negative sentiment lies is around profitability. Two thirds (65%) of the public believe it is 'making bigger and bigger profits' at a time when profits are not universally viewed positively. A third also think the industry is cutting UK jobs, while just 11% disagree. On balance, the majority perception is that pharmaceutical companies do not pay their fair share of tax (23% think they do, but 31% don't), but all of this may not be exceptional to this industry. And tied into this is the belief among 48% of respondents that the NHS does not pay fair value for its medicines, while only 19% believes it does.

"They are entirely necessary for the well-being of the country and must be allowed to make profits if new medication is to be developed."

- Male, aged 73, West Midlands

"The balance between profit and principles is a constant struggle, [I'm] not sure if it is possible for both to win."

- Female, aged 51, Scotland

"Excess profits [are] disproportionate to research costs, [there are] over hyped products, [and an] overcharging of the NHS."

- Male, aged 69, Scotland

Management pay is also an issue, with only 28% agreeing and 36% disagreeing that 'I am prepared to accept that pharmaceutical companies make large profits and pay senior managers large salaries as long as they save lives and provide the medicines we need'. However, agreement is much higher among our 'Opinion Formers' panel where 51% agree that management level personnel can command high salaries in return for meeting a medical need. Of this panel, 31% disagree with this statement.

Ethical concerns are raised, with 50% saying 'the industry employs ethical researchers but too many unethical sales people', while 10% disagree. When pushed to choose whether staff and managers of UK pharmaceutical companies care more about improving public health or about profits, we find overwhelmingly that three quarters (74%) say profit comes first, 13% say they care about both equally, and just 3% believe public health comes first. (9% 'don't know').

"They cannot be trusted to put community needs and ethics above profit. Increased regulation may help, but in the end the profit motive seems to be a barrier to decent behaviour in all spheres of industry and commerce."

- Male, aged 69, Yorkshire/Humberside

The difficult relationship between ethics and commercialism is also seen in public perceptions of the interaction between doctors and pharmaceutical companies. Half (51%) of the public sample and 57% of Opinion Formers agree that "I suspect many UK doctors are paid by pharmaceutical companies to prescribe some particular drugs to patients over other similar drugs", while 15% and 20% respectively disagree.

"Doctors should be forced to put up prominent notices in their practices if they have ANY links with pharmaceutical companies."

- Female, aged 64, East of England

The role of the pharmaceutical industry in the future of the NHS

The NHS is always an emotive research topic with the British population. The fact that the UK's pharmaceutical industry is so closely linked with the NHS - once as a supplier, and now increasingly as a partner - puts the industry in an interesting position. Working together positively in a way that helps improve the NHS could have positive implications for the public's view of the pharmaceutical industry, but if the relationship does not work, then the industry's reputation could be damaged.

Although public trust in the pharmaceutical industry is relatively low, as noted, views about 'Joint Working' between the NHS and the industry gets a relatively positive reaction. 45% are favourable towards the concept if there are clear NHS benefits, but only 19% are enthusiastic enough to believe that way of working is sustainable and will improve both the NHS and the UK pharmaceutical companies who take part. A quarter of respondents expect pharmaceutical companies to get more out of the arrangement than the NHS. Only 17% express concern that "Joint Working' sounds too much like privatisation for their liking.'

This positive acceptance is echoed by the majority (55%) agreeing "I have no problem with pharmaceutical companies working in partnership with the NHS in order to cut NHS costs or improve patient outcomes, while in return, companies increase their knowledge or even make a profit." Just 12% disagree. Agreement rises to 71% amongst Opinion Formers.

Within the sample for this survey were 72 NHS medical staff and 83 NHS staff in other roles. Concern about 'joint working' rises to 24% amongst these NHS workers and is even higher (27%) amongst just the medical staff. However a higher proportion of the medical staff (23%) than the general public also say 'this has to be the future'.

Figure 5. Views on 'Joint Working' between NHS and large Pharma companies.

45%	25%	19%	17%	2%	15%
I don't mind pharmaceutical companies benefiting if 'Joint Working' saves the NHS money and improves care.	I am sure the pharmaceutical companies will get more out of it than the NHS.	This has to be the future, as it will doubtless improve the NHS and make UK pharmaceutical companies more successful around the world thanks to what they learn from this.	I am worried this is too much like privatisation of the NHS.	Other views on Joint Working.	Don't know.

Source: YouGov, representative sample of 4,034 GB adults, August 2013.

"This 'Joint Working' is the way forward but it must be independently audited to make sure cures are not 'lost' or profit comes before patient care."

- Male, aged 51, East of England

"UK Pharmaceutical industry should work direct with the NHS for research and testing of new treatments. Should be ethically managed."

- Male, aged 30, London

What drives the general public's views about NHS funding is that 46% think more taxpayer money should go to the NHS while a further 35% think it is currently about right. 46% believe taxpayers receive good or very good value for money for their funding, 26% say fair and 22% say poor or very poor, while 7% don't know.

When it comes to trying to improve NHS funding through savings, efficiencies or extra budget, it is the relationships with the pharmaceutical companies that top the list. When asked to pick their most important potential changes to funding, 47% say the NHS should try to cut its medicine and equipment bill. Cutting wages for top medical staff and management is picked by 37%, but working in partnership with private companies comes third with 32% (but this falls to 23% amongst NHS staff).

"I am concerned that the NHS is being charged excessive amounts for simple medicines."

- Male, aged 67, East of England

Figure 6. Three best ways to improve NHS funding (Select 3 only).

Which of the following, if any, do you think are the best ways to improve the funding of the NHS, either by making savings, efficiencies or increasing the total budget? Please select the 3 you feel are best.

Cut the prices paid for medicines and equipment.	47%
Reduce wages of top doctors and managers.	37%
NHS should work in partnership with private companies to test and develop new medicines, methods and share skills for mutual benefit.	32%
Spend more money on public health education to cut demand for NHS services.	30%
Withdraw guaranteed treatment for some individuals such as those with preventable or lifestyle diseases.	20%
Use more private companies to provide direct services such as cleaning, community services, blood testing.	13%
Reduce the amount of services provided free to patients.	11%
Those able to pay for NHS treatment should be forced to pay, by using 'means testing' to check who can afford it.	10%
Cut the number of hospitals but make the remaining ones bigger and so more efficient.	6%
Raise prescription costs.	5%
Quality of care should be reduced in order to cut costs.	1%
Other ways to improve NHS funding.	19%
Don't know	9%

Source: YouGov, representative sample of 4,034 GB adults, August 2013.

"On the one hand, [the industry's] work benefits mankind overall. But on the other, as private companies, I might worry that [pharmaceutical companies] could neglect research into new antibiotics if a competing interest promised greater financial profit for shareholders. I don't blame the industry for that, but wonder whether there are ways that governments could find new ways to promote certain areas of research whose social value exceeds the likely financial return."
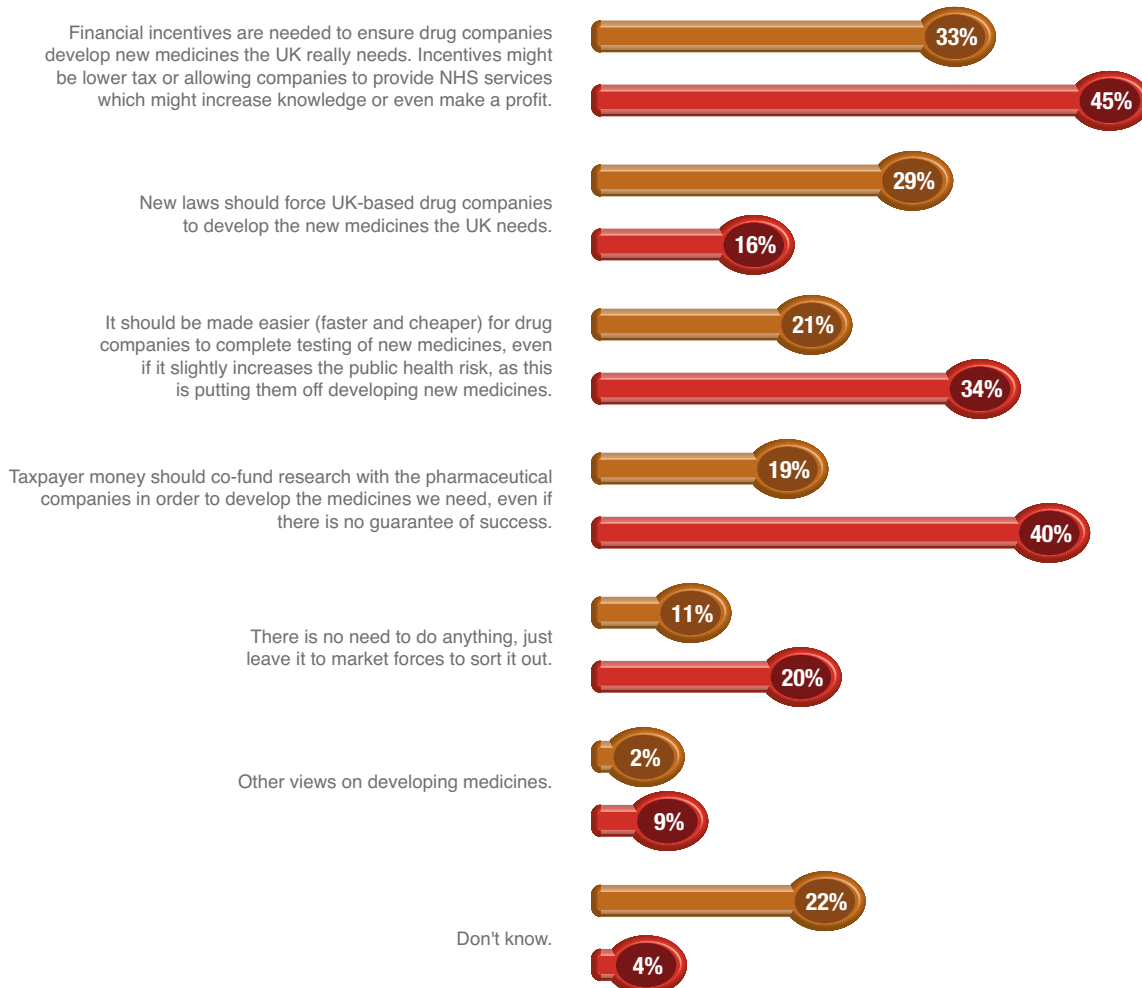
- Male, aged 59, South West England

One of the medical issues currently gaining prominence in the UK is around concerns that the pipeline of genuinely new drugs is running dry. Commentators claim that pharmaceutical companies are failing to invest in research that will deliver anything more than incremental innovation and will not meet the changing needs of developed countries, particularly to combat the rise of drug-resistance. The pharmaceutical industry, by contrast, is concerned about high development costs and lengthening timelines to bring new drugs to market. Survey respondents were asked what, if anything, policy makers should do about the problem.

Figure 7. Preferred actions by UK Government to ensure pharma companies continue R&D.

It is thought that in the future pharmaceutical companies will spend less money than they used to in developing completely new drugs for people in developed countries (such as the UK). This is because it is becoming harder to raise money to invest in research, harder to find new cures, and it is more expensive to develop drugs and test them. Instead it is claimed that the big pharmaceutical companies will focus their resources on selling their existing medicines in developing regions such as Asia and Africa as that is more profitable. What steps, if any, do you believe UK politicians should take? Select all that apply.

■ UK adults

■ Influential people

Financial incentives are needed to ensure drug companies develop new medicines the UK really needs. Incentives might be lower tax or allowing companies to provide NHS services which might increase knowledge or even make a profit.
- UK adults: 33%
- Influential people: 45%

New laws should force UK-based drug companies to develop the new medicines the UK needs.
- UK adults: 29%
- Influential people: 16%

It should be made easier (faster and cheaper) for drug companies to complete testing of new medicines, even if it slightly increases the public health risk, as this is putting them off developing new medicines.
- UK adults: 21%
- Influential people: 34%

Taxpayer money should co-fund research with the pharmaceutical companies in order to develop the medicines we need, even if there is no guarantee of success.
- UK adults: 19%
- Influential people: 40%

There is no need to do anything, just leave it to market forces to sort it out.
- UK adults: 11%
- Influential people: 20%

Other views on developing medicines.
- UK adults: 2%
- Influential people: 9%

Don't know.
- UK adults: 22%
- Influential people: 4%

Source: YouGov, representative sample of 4,034 GB adults; 432 UK 'Opinion Formers', August 2013.

A third of the public (33%) and almost half (45%) of Opinion Formers say that financial incentives should be made available to drug makers to encourage the 'right' drug development, through either tax breaks or access to the NHS market. In contrast, over a quarter of the public opt for a more draconian approach, with 29% saying 'new laws should force UK drug companies to develop the new medicines the UK needs, but this is only picked by 16% of Opinion Formers, whose second choice is to use taxpayer money to co-fund the research and development in priority areas.

The attitude of leaving it all to market forces is only picked by 11% of the public and 20% of Opinion Formers. With so much support for government intervention of one sort or another, but no clear mandate from the public about what this should be, this issue will doubtless continue to be a problem.

'With so much support for government intervention of one sort or another, but no clear mandate from the public about what this should be, this issue will doubtless continue to be a problem.'

Oliver Rowe is Director of Reputation Research at YouGov.

Fieldwork for the general population survey was conducted online between 20-28 August, 2013, with a total sample of 4,034 British adults. The data has been weighted and the results are representative of all British adults aged 18 or over. Two further surveys were conducted online, including: a representative survey of 100 UK Members of Parliament between 27 June and 10 July, 2013, and a survey of 432 members of YouGov's panel of UK 'Opinion Formers' between 15-20 July, 2013.

For more information on methodology or results, please email: info@yougov.com

5. The global race for influence and attraction: the role of the state

BRITISH COUNCIL

A world of increasing connections

In the 21st century, a 'great game' is being played out in the world. Success is not measured in the strength of armies or the might of economies, but is increasingly played out across the airwaves, on the internet, in universities, in sport stadia and even in concert halls. This game is the growing international competition for soft power, 'the ability to attract and co-opt rather than coerce', and it is the fastest growing force in international relations.[1]

The way nations, people and business interact around the world is changing fast. The international landscape is being transformed by digital hyper-connectivity, social media, and the rapid rise of direct people-to-people connections - through interaction unmediated by states. Contact between countries is no longer just conducted via embassies and agreements between governments, it's something that is happening every second between individuals, institutions, businesses, charities and other bodies.

This presents a major challenge to traditional assumptions about the role of the state in international affairs. While no one would doubt that the state still has a major role to play, it is important to recognise that the state does not have primacy in the development of a country's soft power. Soft power stems largely from factors outside the direct control of governments. This poses a major challenge for policy makers, but also opportunity for those who get it right.

How can a nation build its soft power?

The rise of people-to-people influence and the resultant diffusion of power away from governments suggest that persuasion, trust and what ordinary people around the world think of the UK will matter more and more to our future. But how can international reputation and connectivity be developed? Soft power cannot be built in the way a government would build an embassy or an air force. What a nation should do is to develop and share its most attractive assets. For the UK these will include its arts and culture, its education system, the values of tolerance and diversity by which its people live. Research undertaken by the British Council working with YouGov and Ipsos-Mori has shown that openly sharing our own assets and taking an interest in other people's culture have been found to build trust in people from the UK and to improve the UK's reputation as a good place to do business, study and visit.[2] Further analysis of the results has also shown that cultural contact also leads to an increased awareness of and interest in exploring business opportunities with the UK.[3]

'Soft power stems largely from factors outside the direct control of governments.'

Cultural contact with a nation can transform people's perceptions, as the British Ambassador to China said in 2013, "The Olympics opening ceremony and the UK Pavilion at the Shanghai Expo, together with a big UK arts festival last year and some good 'GREAT' events, have helped move the dial on perceptions of the UK brand. Many Chinese people now associate us strongly with creativity as well as tradition and English gentlemen. This can help our exporters across the board – from advanced engineering to fashion. One of China's fastest rising young politicians observed factually to me the other day that the UK was the most creative country in the world."

The fact that many countries' arts, cultural and education sectors are not directly controlled by the state can create challenges for policymakers who are intent on improving national reputation, but this independence can also be seen as a strength in soft power terms.

So what role can and should the state play?

Although the major sources of soft power are increasingly things which are not directly controlled by government, the state can still play an important role.

Government policy can support open and dynamic exchange between people – for example through its policy on providing funding for international cultural exchange or scholarships and also through its immigration and visa policies. We know that people who visit the UK and form friendships with people from the UK are more likely to feel positively towards the country and more likely to want to do business with our companies.[4] Therefore, ensuring we have a policy framework that enables this to occur will be increasingly important.

It is also important to ensure that individual citizens develop global awareness and skills to engage internationally. If the UK's population of over 63 million people is internationally literate and aware and uses social media and other networks to form relationships with people around the world, the result will be significantly increased influence and prosperity. Governments can therefore play a key role in equipping people with the language skills required to be successful in a more connected and networked future and also in ensuring that international issues are discussed as part of the school curriculum.

Last but not least, government can also play a crucial role by providing a supportive but not controlling environment to foster excellence in education, arts, culture and sports. By providing core funding and a supportive regulatory environment, while promoting innovation and encouraging an entrepreneurial approach to draw in other income, governments can make a real difference.

'Attempts to control the cultural and educational image of a country too tightly are likely to undermine its authenticity.'

When the state does this well the results can be world class - take Danny Boyle's opening ceremony for the Olympic Games, where the Government provided the funding and support, but he was given total artistic freedom to design the ceremony as he saw fit. Or our leading universities, which have become second only to the US in their global rankings in an environment where they have a high degree of independence from direct government oversight of their operations.

When states do this badly, the results can have a negative impact on their international reputation. Indeed, any attempts to coordinate or control the cultural and educational image of a country too tightly are likely to undermine its authenticity and therefore its attractiveness to others.

What does this mean for the UK?

To stay competitive in the global soft power stakes, the UK is well served by continuing to support cultural exchange through independent, autonomous institutions and brands like the BBC, Premier League, universities and the UK's theatres, galleries and museums. The trust that these bodies and the artists, educators, sports people, curators and broadcasters they support generate for the UK builds the relationships and environment that attract people and businesses to choose the UK over competitors.

The UK does not wholly 'state fund' or 'state control' cultural bodies and universities. All the UK's best cultural bodies and universities earn income, innovate, partner and are entrepreneurial in pursuit of their mission. However, public funding and a public service mission remain critical to their continued success, by providing the space to innovate, to take creative risks and to invest long term in a way that would not be possible in a purely commercial model. These bodies are also more aligned with government and national policy than in countries where there is no connection. As a result of government investment, the UK's cultural and educational sector has developed world renowned quality that goes above and beyond what would have been achieved via a pure market model. And organisations like the British Council and BBC World Service are active in strategically important places where they would not be able to operate if dependent only on self-generated income. The UK's soft power success is a direct result of this 'mixed economy' model.

'The UK's soft power success is a direct result of a 'mixed economy' model.'

Most importantly, government can provide core funding, but it can also ensure an optimal regulatory environment and help to foster the skills needed to ensure future growth and excellence. However, if the state starts to interfere in artistic or research output, the results can be completely counterproductive. Recent research by Demos has added to the growing body of evidence saying that if governments are seen to be deliberately trying to influence public opinion overseas, it can invite suspicion and hostility.[5] In addition, too much government intervention can stifle creativity and innovation. Indeed the UK has much reason to thank John Maynard Keynes for his development of the concept of Arm's Length Status for the Arts Council – a model which also applies to all of our other major, national cultural and educational bodies and ensures that decisions are taken on artistic and academic merit and are not unduly influenced by the government policy of the day.[6]
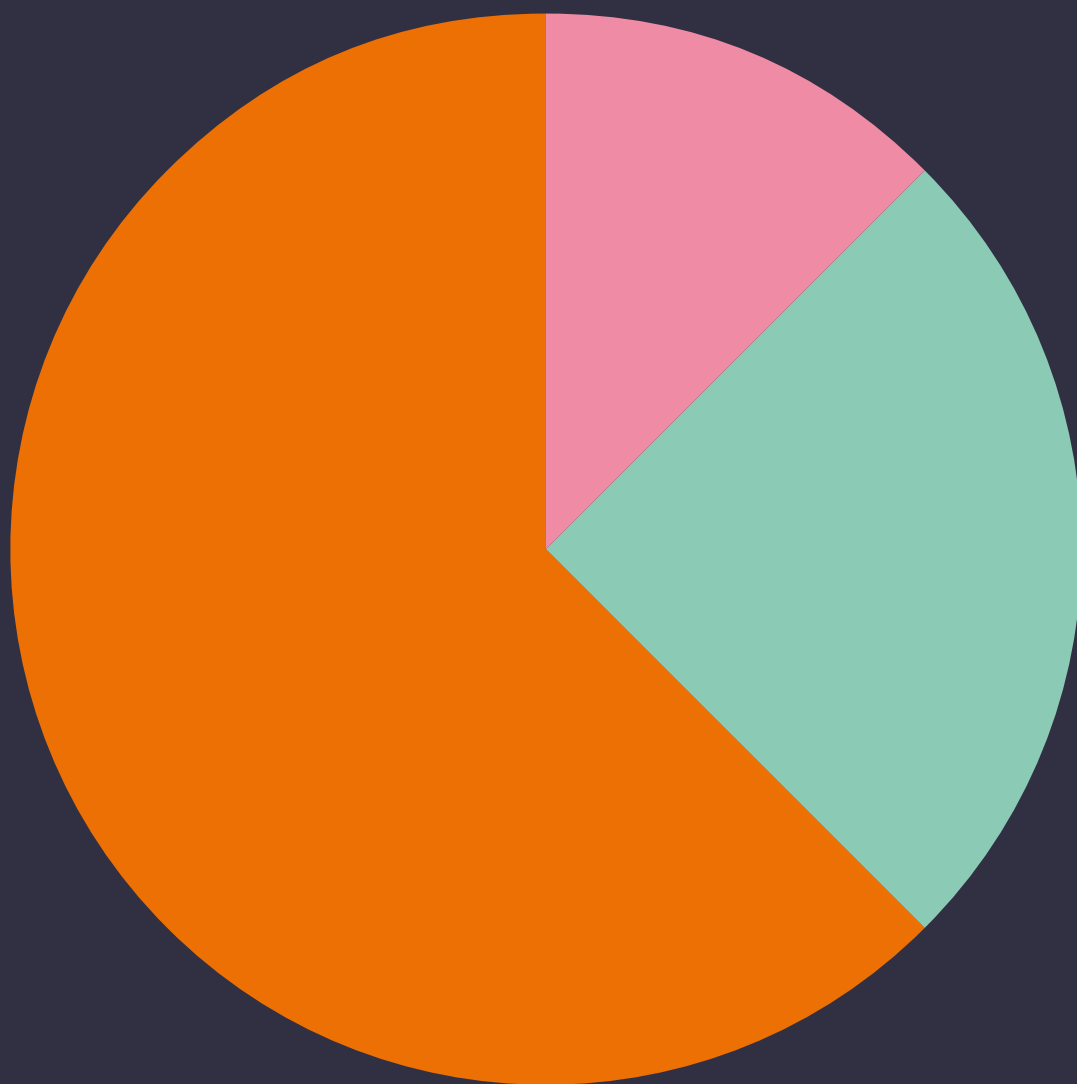
The "global race"

Other countries are playing catch up to the UK on international aid provision, are spending more than the UK on hard power assets, and investing heavily in their soft power offer. In 2012, the UK was ranked number 1 in the world for its soft power.[7] But this could change fast. Much has been made of the Chinese government's ambitions for its global network of Confucius Institutes, its international English language news services and its development aid spending in Africa, but it is not the only rapidly emerging soft power. Brazil, Turkey, the Gulf States, South Korea and others are all focussing on the potential of soft power to increase their global influence; to enhance their international reputation; and to attract international investors, students and tourists.[8]

The UK has some of the strongest cultural and educational assets in the world, making it one of the most attractive places on earth. However, it cannot afford to rest on its laurels. The UK must continue to foster its entrepreneurial mixed-economy funding model and do more to develop internationally literate citizens with the language skills required for life in the 21st Century. This will be essential for the UK to continue to benefit from the prosperity and influence its soft power brings.

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