

External Cultural Policy in International Comparison

Summary of the Report

Berlin, December 2019

With generous support:



Auswärtiges Amt

About the project:

This study was carried out as part of the project "Foreign Cultural and Educational Policy in Comparison: Germany and its Competitors", which was conducted by the Hertie School and supported by the Federal Foreign Office.

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Table of Contents

Global Report	5
Introductory Remarks	7
1 Cultural Policy in Comparison	11
1.1 Key Actors and Instruments in External cultural policy:	11
2 Language Policy in Comparison	14
2.1 Key Institutions and Actors in Language Policy.....	14
3 Educational Policy in International Comparison	16
3.1 Key National Instruments and Actors in International Educational Policy:	17
2 Science and Higher Education Policy in Competition	19
4.1 Key National Institutions and Actors in International Science and Higher Education Policy	19
5 Media and Communication in Comparison.....	23
5.1 Key National Institutions and Actors in Foreign Media.....	25
6 New Media in International Comparison	28
6.1 Key Actors and Instruments in New Media	29
7 Conclusions of the Report	32
Bibliography	37
The case of Egypt	45
List of Tables and Figures.....	46
1 Germany	49
2 France	50
3 United Kingdom.....	51
4 United States	53
5 Russian Federation.....	54
6 People’s Republic of China	55
7 Turkey.....	56
8 Qatar.....	57
Bibliography	58
The case of Kenya	63
List of Tables and Figures.....	64
1 Germany	67
2 France	68
3 United Kingdom.....	69

4	United States	71
5	Russian Federation.....	73
6	People's Republic of China	73
7	Turkey.....	75
8	Qatar.....	76
	Bibliography	77
	The case of Serbia	78
	List of Tables and Figures.....	79
1	Germany	82
2	France	83
3	United Kingdom.....	84
4	United States	86
5	Russian Federation.....	88
6	People's Republic of China	90
7	Turkey.....	92
8	Qatar.....	93
	Bibliography	94

Global Report

List of tables and figures

Tables

<i>Table 1.</i> Annual Number of Language Students at Cultural/Language Institutes	16
<i>Table 2.</i> Statistics on selected foreign school programmes (2018)	18
<i>Table 3.</i> Foreign University Student Enrolment	21
<i>Table 4.</i> Foreign Students as a Proportion of Total University Students.....	22
<i>Table 5.</i> Statistics on International Education Promotional Programmes	23
<i>Table 6.</i> Key Figures regarding Foreign Media	24
<i>Table 7.</i> Comparison of International News Agencies	28
<i>Table 8.</i> Social Media following of Foreign Media (English)	31
<i>Comparison Table 1.</i> Key Features and Challenges	9
<i>Comparison Table 2.</i> Key Features and Challenges.....	34

Figures

<i>Figure 1.</i> Change in Number of Cultural Institutes Over Time.....	13
<i>Figure 2.</i> Foreign University Student Enrolment	22
<i>Figure 3.</i> International Students as a Share of Total Enrolment.....	23

Introductory Remarks

The concept of External cultural policy (ECP) as the "third pillar" of German foreign policy, on an equal footing with political and economic relations, was coined by Willy Brandt in his role as Foreign Minister in the late 1960s and remains as part of the officially-stated goals of German foreign policy (Krath, 2015, p. 19; Maas, 2019). The core concern of the German External cultural policy (AKBP) is to "improve access to culture and education worldwide and thus create pre-political freedom for dialogue and discourse, for creativity and understanding" as well as "to open up new professional perspectives and educational opportunities for people worldwide, to promote global partnerships and to strengthen the spirit of international cooperation".

As Foreign Ministry Heiko Maas remarked in January 2019, ECP's "significance as an instrument of peace policy has been growing for years" (Ibid.). Particular values are also emphasized. The Federal Government's 2018 report on ECP emphasized a decidedly normative view, stating that "in view of the worldwide phenomenon of shrinking spaces and the threats to which artists, scientists and opinion makers are exposed, the AKBP's commitment to the freedom of art, science and opinion is a central goal worldwide" (Auswärtiges Amt, 2018, p. 9).

To this end, the Federal Government works in the following thematic areas with central intermediary 'arm's-length' organisations:

- Culture and Language (Goethe-Institut, ifa, etc.)
- Education and Science (DAAD, Alexander von Humboldt Foundation, PASCH, etc.)
- Communication & Media (Deutsche Welle, DW Akademie).

ECP is characterised on the one hand by a remarkable continuity, and on the other hand by its efforts to adapt to dramatic global developments, such as German reunification, the eastward expansion of the EU or the consequences of the terrorist attacks in 2001. The geopolitical situation, which has changed considerably in recent years, presents ECP with completely new challenges: be it refugee flows and civil wars or questions of freedom of science and media influence in internal affairs. To add to the complexity, recent years have seen a nationalist and inward-looking turn in some of Germany's oldest partners. Given these developments, Germany's ECP finds itself in an increasingly intricate mixture of cultural, economic and security interests.

Germany not only finds itself in economic competition with traditional and new competitors, but also culturally: until the end of the Cold War, only a few countries had a strategic orientation of their cultural policy towards the outside world in order to position themselves advantageously in international competition. Countries such as Russia and China use ECP specifically in the sense of a political-economic positioning and invest massively in the expansion of their cultural institutes and foreign media. Meanwhile, smaller countries like Turkey and Qatar have used foreign cultural and education policy to boost their clout and amplify their regional and global status. Without a doubt, the field of global ECP competition has become denser and more complex.

The selection of comparable countries, which was made in consultation with the Federal Foreign Office, reflects this diversity of competitors. The European neighbours **France** and **Great**

Britain can look back on a long tradition of external cultural policy whose approaches date back to the 19th century and are roughly comparable with Germany's approach. The **United States** has traditionally shaped the international debate over ECP with concepts such as "soft power" and "public diplomacy". American initiatives, such as the prestigious Fulbright program, serve as role models worldwide. US mass media is known worldwide, and features prominently into 'cultural diplomacy'. However, the budget cuts and foreign policy priorities of the Trump Administration have called into question the importance of ECP to American aims abroad. At the same time, many countries see their external cultural policy as a conscious alternative to American and European influence in the world and thus justify high investments. **China** and **Russia** serve as examples here, whose respective foreign cultural policies are based on Cold War traditions, but at the beginning of the millennium were lastingly shaped by the commitment of Americans and Europeans in Eastern Europe and the global South. **Turkey** has solidified its control of domestic cultural institutions—including religious organisations—and has used this influence to spread influence across its region and among the diaspora community. The external cultural policy of **Qatar** is also presented here and compared with German policy. Qatar has attracted attention by hosting major sporting events and enticed international educational institutions to come to 'Education City' outside of Doha as part of its external cultural policy.

Core narratives and contexts of External Cultural Policy:

Country	Primary Goals of Foreign Cultural Policy	Aspects of the broader political environment or foreign policy context
Germany	<ul style="list-style-type: none"> • Creation of pre-political freedom for dialogue and discourse • Building trust and points of contact with German culture • Support for civil society and freedom of the press 	<ul style="list-style-type: none"> • Promotion of liberal democratic values • European Integration • Generating a positive, nuanced image Germany
France	<ul style="list-style-type: none"> • Building long-term relationships through French language and culture • Promotion of cultural diversity • Strengthening Francophonie 	<ul style="list-style-type: none"> • Promotion of liberal democratic values • European Integration • <i>Exception culturelle</i> in international trade
United Kingdom	<ul style="list-style-type: none"> • Strengthen language as USP • Convey the attractiveness of the UK • Economic competitiveness in a globalized world 	<ul style="list-style-type: none"> • Promotion of liberal democratic values • Management of globalization • Uncertainty of future ties with EU as a key unknown variable
United States	<ul style="list-style-type: none"> • Expansion of international influence • Expansion of an open market of cultural goods 	<ul style="list-style-type: none"> • Promotion of liberal-democratic values ("voice of liberty") • "Hearts and Minds" and beneficial trade policy • Geopolitical considerations
Russia	<ul style="list-style-type: none"> • Support for pro-Russian integration processes in the post-Soviet space ("near abroad") • Expansion of international influence 	<ul style="list-style-type: none"> • Creating a cultural space in Eurasia • Alternative to western model, especially the EU
China	<ul style="list-style-type: none"> • Help shape international discourse • Generate an attractive image and understanding of Chinese culture • Creation of a beneficial trade climate 	<ul style="list-style-type: none"> • Alternative to the western model, particularly that of the US • Preparation for China's role as a world power
Turkey	<ul style="list-style-type: none"> • Influence in neighboring regions—particularly Turkic countries • Promoting Turkish model as an alternative to Western one • Promotion of religion abroad, especially with diaspora 	<ul style="list-style-type: none"> • Increasing centralization of power as a core feature of cultural policy • Breakdown of EU accession negotiations leaves Turkey in need of new target regions
Qatar	<ul style="list-style-type: none"> • Building cultural sector as part of economic diversification • Attempt to establish Al Jazeera as a leading media source for the Arab world and globally • Establishing a hub for culture, featuring western institutions 	<ul style="list-style-type: none"> • Independence as a "neutral" actor in the Middle East; state sovereignty and autonomy • Increasing geopolitical peril in the region

Based on this selection is issue areas and comparison countries, this study attempts to make a systematic comparison between Germany and other key actors on the basis of the following key questions:

- How is Germany positioned in comparison to other countries in these areas? What are the strengths and weaknesses of their external cultural policy structures?
- Are there innovative approaches and models from which Germany can learn?
- What opportunities and challenges arise for German external cultural policy in the context of international competition?
- How have these dynamics shifted since the 2017 report was published?
- What specific actions taking place in the target countries that are relevant to Germany's foreign policy goals in those countries?

An Overview of core elements of each country's external cultural policy follows below:

Comparison Table 1. Key Features and Challenges

Country	Central Features	Challenges	"Take away" for Germany
Germany	Well-established institutions, strong acknowledgement of ECP as a crucial 'third pillar' of Germany foreign policy, use of ECP to spread values	Increasingly contested space of ECP, declining certainty of old partners, instability in neighbouring regions, resulting in migrant inflows and problems with integration	Strong basis through excellent institutions (DW, GI, etc.) but contested field of ECP and geopolitical uncertainty necessitates greater investment to maintain strong position
France	Strong presence in Europe and Near and Middle East, Africa; Francophonie; French as an official language of international organisations	Long-term reduction of state financing; Find new partners; English as lingua franca; loss of importance of French; decline of French teaching in schools; digital change	Close ties between cultural institutes and the diplomatic network; Involvement of the independent association Alliance Française for a nationwide offer Focus on selected target regions
Great Britain	English as <i>lingua franca</i> ; high demand for English courses; Cooperation with the British cultural and creative sector; High proportion of self-financing	Imposition of savings; ¹ Pressure to justify by government (evaluation / impact); Focus on business; Brexit consequences difficult to predict; regionalisation	Strong "brand" in cultural exchange; Language courses as cultural capital for economic use; Investment in new formats, e.g. mass online course to prepare for language tests
United States	Great attraction (culture, universities); English as <i>lingua franca</i> ; reorganisation of important agencies under Trump; Cooperation and co-financing as a basic model;	Political uncertainty of the Trump era; weakening of the State Department; uncertainty in financing; coordination of private partners and quality assurance	Language promotion through private partners; Fulbright programme as an international role model; Strong focus on geopolitical core regions

¹ While new investments are being planned at the BBC World Service, it is striking that the overall budget of the British Foreign Office for the British Council has been significantly reduced in recent years. It remains to be seen what the supposed 'anti-austerian' turn under Prime Minister Johnson will portend.

	Social media platforms almost exclusively American		
Russia	Instrumentalization of power politics; Targeted cooperation with sympathizers abroad; Focus on media; Massive investments in digitization	Allegation of influence and targeted disinformation; loss of Russian significance; hardly any exchange with Russian students; Credibility of the media doubted; credibility / criticism in Western countries	Broad audience through high online presence; clout of online campaigns; dissemination of information by individuals
China	Largest cultural network in the world; joint venture model; high demand for language courses; high investments; broad expansion of digital communication as well	accusation of state influence and instrumentalization of culture; reach and influence controversial; 'Great Firewall of China' makes exchange difficult	Rapid expansion through cooperation with partner institutions (including schools and universities); language teaching as a joint venture
Turkey	Strong ties and influence over Turkic countries; governmental control of many cultural institutions; 'lack of vision' and incoherence in ECP	Loss of prestige and appeal due to authoritarian turn; budget constraints with slowing economic growth; backlash abroad—particularly Europe	Contested normative values in Germany's 'neighbourhood'; influence over diaspora population within Germany's borders; potential continued cooperation in cultural initiatives with Istanbul
Qatar	High investments in culture and art; major events; Continued high media coverage; financing by the royal family; Digital infrastructure development	Establishment of a cultural industry by combining Western models with Arab traditions; Anti-Muslim climate and prejudices against Arabic; Loss of credibility; negative reporting	International dialogue through cultural centres and major events within country; cooperation with international partners; Potential for International Branch Campuses; online branding; overreliance on financial incentives

1 Cultural Policy in Comparison

A large number of actors are particularly active in the field of culture. These range from cultural institutions such as museums and concert halls to foundations and other civil society organisations to individual creators of culture and the arts. This study focuses primarily on government institutions and intermediary organisations that implement cultural programmes worldwide on behalf of the government. Many of these actors are also familiar with language promotion abroad and will therefore be examined again from this perspective.

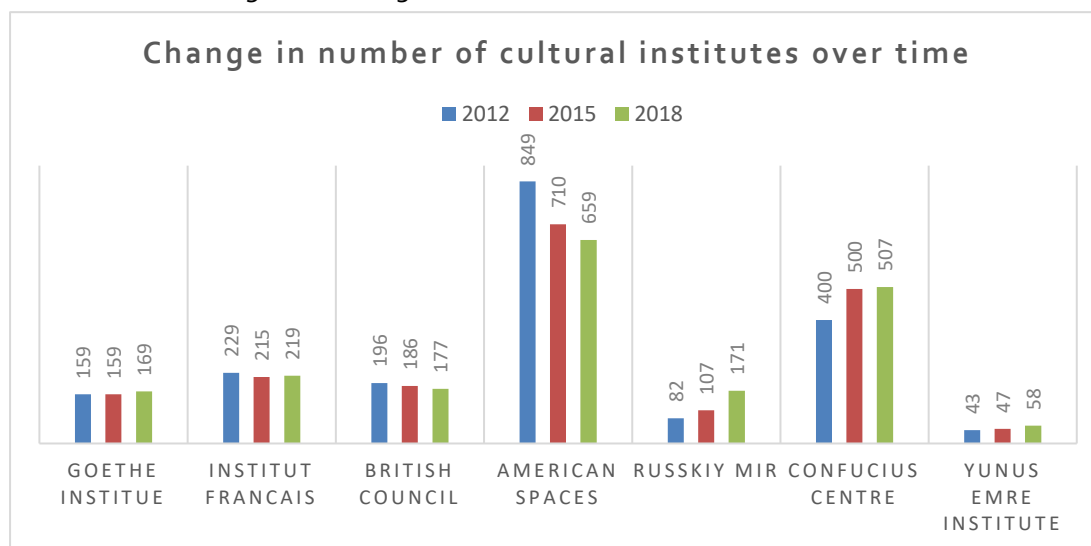
1.1 Key Actors and Instruments in External cultural policy:

- The **German** Goethe-Institut is not the only, but is the largest German intermediary organisation. Its task is to promote the German language abroad, to foster international cultural cooperation and to convey a comprehensive picture of Germany. It has 169 institutes in 98 countries, including twelve regional institutes as well as twelve institutes and the headquarters in Germany. GI also contributes to bilateral cultural years with foreign countries, such as the 2019 'Wunderbar Together' programme with the United States. In addition, the Goethe Institutes include a dense network of other local forms of presence, such as Goethe Centres, cultural societies, reading rooms as well as examination and language learning centres. Altogether, people can access the resources and services of the Goethe-Institut in almost 1,100 contact points (GI, 2019). About 3,500 people work for the Goethe-Institut: 2,600 abroad and about 900 in the headquarters and the institutes in Germany (GI, 2018). The Institut's total income consists primarily of its own income from language courses and institutional funding as well as project funding from the Federal Foreign Office (*ibid.*, p. 119).
- **In France**, the Institut français and the Alliance Française are responsible for cultural work abroad. In addition to the agency in Paris, the Institut français consists of a network of 96 national institutes with a total of more than 200 cultural centres, some of them historical, which act under the same name and logo to improve the visibility of external cultural policy. The Institute is active in more than 100 countries (British Council, 2018b). The more than 800 independent institutes of the Alliance Française are active in over 130 countries, primarily in language promotion, but also complement the cultural offerings of the Institut français, particularly in North and South America, where the state institute has only nine offices (Schneider, 2015, p. 362). Funding has recently been boosted to return to previous levels.
- **Great Britain**: The British Council promotes programmes in the areas of education, culture and society. In the area of culture, for example, the British Council is responsible for organising bilateral cultural years (British Council, 2016a, p. 12). In 2017 the British Council helped to organise a cultural year with India, the country it identifies as extremely critical in its international cultural efforts (Sonwalkar, 2017). Since 2015, it has increased the number of countries it is active in, but reduced the total number of offices. As of 2018, there were 177 offices in 114 countries (British Council, 2018b). Due to the decentralised structure of Great Britain, England, Scotland, Wales and Northern Ireland each have their own cultural institutes, the so-called Arts Councils. They are also active in the field of international cultural cooperation and often work together with the British Council (Schneider, 2015, p. 366).

- **United States of America:** As is the case with the general conception of culture in the US, the state plays only a subordinate role in the promotion of culture abroad. Cultural projects are planned by the Bureau of Educational and Cultural Affairs and implemented jointly with American or local partners. Abroad, the American Spaces in particular are responsible for cultural work. After undergoing a slight reorganization in recent years, the American Spaces now include 111 "Binational Centers," which have been operating independently and locally managed in Latin America since the 1920s; 105 "American Centers," which were founded primarily after the Second World War and administered by the United States; 35 "Information Resource Centers," which are located in embassies and consulates; and 472 "American Corners" in libraries and educational institutions (US Advisory Commission on Public Diplomacy, 2018, p. 146). Of the approximately 650 total American Spaces in over 140 countries, 85% are supported in partnership with local hosts (Office of American Spaces, 2017, p. 3).
- **Russian Federation:** The Federal Agency for the Commonwealth of Independent States, Compatriots Living Abroad and International Humanitarian Cooperation – known as Rossotrudnichestvo – is primarily responsible for cultural work abroad. Rossotrudnichestvo is active in 80 countries. Employees of Rossotrudnichestvo are spread across 95 offices, which consist of 72 Russian centres of science and culture in 62 countries and 23 other representations (British Council, 2018a, p. 26). The foundation Russkij Mir, which is closely aligned with the state, also supports foreign cultural work with 171 locations spread across 65 countries (British Council, 2018b). This represents a significant jump from 107 locations in 47 countries in 2015 (Rossotrudnichestvo 2017, p. 3). Its aim is not only to preserve Russia's cultural and linguistic heritage, but also to protect its "spiritual" heritage. To this end, the Foundation is increasingly cooperating with the Russian Orthodox Church (Van Herpen, 2016, p. 148).
- **People's Republic of China:** At the end of the 1980s, the Chinese government opened the first China Cultural Centers (CCC) in Mauritius and Benin. With the opening of Chinese cultural policy, the number of new openings increased drastically from the turn of the millennium. The expansion of the cultural centres follows the rule "one country - one institution". In 2018 there were a total of 31 centres with a total budget of 52 million EUR, funded by the Chinese state (Li, 2019). The number of cultural centres is to be more than doubled by 2020 (Zhangyu, 2015). The cultural departments of the embassies also support cultural events. In addition, the Confucius Institutes and classrooms offer cultural activities, but are above all responsible for language promotion. By 2020 there should be 1,000 Confucius Institutes worldwide (Smits, 2014, p. 7). Currently most institutes and classrooms can be found in the USA and Europe, but the number in Africa and Asia is also rising steadily.
- **Turkey:** The rapid growth of the Yunus Emre Institutes (YEE) abroad has been a key development in Turkish ECP. First established in 2007 at the direct order of President Erdoğan, YEE has expanded to 58 locations, the vast majority of which are located in Europe, MENA, and Central Asia. YEE plans to increase to 100 locations by 2023 as part of the broader cultural efforts surrounding the centenary of the Turkish Republic (Yunus Emre Institute, 2019). According to its own figures, YEE had expenditures of 11.3 million EUR in 2017 (Yunus Emre Institute 2018b, 149). Another significant, and lavishly funded, Turkish ECP initiative is the promotion of religion abroad via Diyanet, the Presidency of Religious Affairs. It prepares the weekly sermon for 85,000 mosques in Turkey and 2000 abroad. It receives nearly 2 billion euros in funding per year – roughly equal to the Foreign, Energy, and Culture and Tourism ministries combined (Ahval, 2018)

- **Qatar** does not have a network of cultural institutions. However, as part of 'Agenda 2030', Qatar plans to establish itself as an important global cultural centre, with flagship initiatives like the Museum of Islamic Art in Doha (The Telegraph, 2013). In addition, an architectural complex was opened in 2010, the cultural village of Katara, where many cultural institutions are located and which is supported by the Qatar Foundation. The organization Qatar Museums not only manages these museums, but is also responsible for the implementation of cultural years. The most recent of these were Qatar-Germany (2017) Qatar-Russia (2018) and Qatar-India (2019) (Qatar Museums, 2019). The Permanent Committee for Organizing Conferences also organizes Arab, regional, and international conferences, summits, meetings, and forums on behalf of the government (The New York Times, 2014). The Qatar Foundation International is committed to the dissemination of Arab culture in foreign schools.

Figure 1. Change in Number of Cultural Institutes Over Time



	Goethe Institut	Institut Français	British Council	American Spaces	Russkiy Mir	Confucius Centre	Yunus Emre Institute
2012	159	229	196	849	82	400	43
2015	159	215	186	710	107	500	47
2018	169	219	177	659	171	507	58

2 Language Policy in Comparison

The promotion of the respective national language abroad is almost always at the centre of the cultural-political strategies of the countries examined in this report. In addition to providing access to cultural goods and facilitating economic and scientific exchange, language learning represents a critical ingredient in truly understanding another country. Language policy is directed by a wide range of institutions. Cultural institutes offer language courses and examinations for different target groups while schools and universities support language teaching with teacher training and the provision of teaching materials (see below). Additionally, foreign media also contribute to the dissemination of the respective language and facilitate digital learning, with language courses and training available on their websites. Although the focus of this study is primarily on the direct or indirect promotion of language teaching, other strategies, such as the targeted promotion of a working language in international organisations, also factor in to the international cultural power of language.

Compared to other languages, efforts to teach English abroad have been scaled back by the US and UK. This is likely due to the 'natural' appeal of English as a *lingua franca*. Despite the challenge that English's appeal presents to the globalisation of German, this opens a void for other globally significant languages to be taught. As already mentioned under the topic of culture, many central actors in cultural work abroad are also jointly responsible for language promotion. Frequently, income from language courses, especially within Europe and North America, is used to finance other cultural and social programmes. In addition, the expertise of the actors listed here is increasingly being used domestically to help migrant workers and refugees learn the language of their new home. This represents a particular opportunity to increase of the appeal of the German language worldwide.

2.1 Key Institutions and Actors in Language Policy

Germany: On behalf of the government, the Goethe-Institut promotes the German language, by offering language courses, providing teaching materials and online tools, and also through cooperation with schools (see below). In 2018, more than 272,000 people took part in the Institute's language courses, including almost 38,000 in the 12 centres in Germany (British Council, 2018b). In addition, more than 555,000 people took a language examination at the Goethe-Institut or at one of the examination cooperation partners, an increase of over 100,000 from a three years earlier (Goethe Institut, 2019). Deutsche Welle also provides online multimedia services for learners of German (<http://www.dw.com/de/deutsch-lernen/s-2055>).

France: As in cultural cooperation, the Institut français and the Alliance Française are also key players in language promotion. They offer French lessons and award the French language certificates DELF and DALF. Every year nearly one million people take part in the language courses of the Institut français and the Alliance Française (British Council, 2018b). In addition, RFI Savoir, a multilingual knowledge and learning platform of the radio station RFI, aims to give users "the keys to understanding the world in French" (<https://savoirs.rfi.fr/en>).

United Kingdom: As is the case in other European countries, the promotion of both language and culture are carried out by the same institution, in this case the British Council. It works closely with partner organisations and sets quality standards for independent language institutions. In 2018, around 400,000 people took part in language courses in the British Council's more than 80 language centres. Additionally, 3.2 million people took the IELTS language test, which the British Council offers together with other partners (British Council, 2018a, p. 15).

United States: The Office of English Language Programs develops the language programs of the American government. The office works closely with the U.S. embassies and their Regional Language Officers. In the course of the reforms in the late 1990s and early 2000s, many of the language courses offered were handed over to private companies and NGOs (Rugh, 2014, p. 137). Only a few programmes are still directly supported by the government, such as the English Access Microscholarship Program, under which underprivileged 13-20 year olds from more than 85 countries can take part in language courses. Since 2004, over 150,000 students have taken part in the programme (U.S. Advisory Commission on Public Diplomacy, 2016a, p. 121; Bureau of Educational and Cultural Affairs, 2019). The American Spaces also offer English courses or material, and the foreign broadcaster Voice of America supports language promotion online: <https://learningenglish.voanews.com/>.

Russian Federation: Language promotion is also part of the focus of the Rossotrudnichestvo promotion agency, which offers language courses in the "Russian Business and Cultural Centres". The state-owned foundation Russkij Mir was founded in July 2007 on the occasion of the official "Year of the Russian Language". The Foundation's 171 centres offer language courses and maintain libraries of Russian literature (British Council, 2018b). In addition to these institutions presented here, the Pushkin State Institute in Moscow, which specialises in Russian as a second foreign language, is also expanding its network worldwide. In 2017 there were already 39 language centres in 24 countries (Sputnik, 2017). The foreign broadcaster RT also offers Russian courses online (<http://learnrussian.rt.com/>).

People's Republic of China: The 27 China Cultural Centres offer language courses and above all the approximately 500 Confucius Institutes and 1,000 Confucius classrooms are responsible for language promotion abroad. In 2015, approximately 1.4 million participants were registered in the courses at the Confucius Institutes and another 500,000 for the courses online. In the same year, about 6 million people took part in the various language tests offered in the institutes and classrooms (Hanban, 2016, p. 3). Both the television station CCTV and the radio station CRI support language promotion with online services (<http://english.cntv.cn/learnchinese;> <http://english.cri.cn/o8chinese/index.htm>).

Turkey: Turkish cultural centres also double as language-learning locations. The YEE currently has 58 locations and its stated aim is to "provide services abroad to people who want to have education in the fields of Turkish language, culture and art, to improve the friendship between Turkey and other countries and increase cultural exchange". It aims to reach 100 locations by 2023, and has been noted by the European Commission as 'instrumentalising' the Turkish language. Total programme participants now exceeds 100,000 since 2009, with 2131 taking exams in 2017 (Yunus Emre Institute, 2017, p. 105). Turkish language is also taught abroad in local school with coordination

from the embassies and consulates, as is the case in Germany. YEE also offers online Turkish learning materials free of charge (<https://turkce.yee.org.tr/>).

Qatar: Through the Qatar Foundation International, Qatar primarily promotes Arabic language teaching in schools in North and South America as well as in Great Britain. The foundation itself does not offer any courses, but supports the schools in offering language courses (see below under Education). The Foundation also promotes exchange programmes and provides teaching materials for teachers on the website "Al Masdar" (the source) (QFI, 2017a). Al Jazeera also promotes the dissemination of Arabic through offers on its website (<http://learning.aljazeera.net/arabic>).

Table 1. Annual Number of Language Students at Cultural/Language Institutes

Country	Institute	Participants 2018	Participants 2015
China	Confucius Institute	2,100,000	1,400,000
France	Alliance Francaise+Institut Francais	2,300,000	2,270,000
Germany	Goethe Institut	272,000	272,000
Turkey	Yunus Emre Institute	11,000	-
United Kingdom	British Council	13,200,000	11,000,000
United States	American Spaces	44,189,000	31,000,000

3 Educational Policy in International Comparison

An international comparison shows that many of the cultural and educational measures abroad are aimed at young people. While in the last millennium the exchange of elites was often a declared goal of cultural work abroad, the strategies of many countries today target children and young people as key demographic groups. By promoting schools abroad and in particular the teaching of the respective language at a young age, the countries examined here hope to support a positive connection at an early stage. This link is to be maintained through other measures in the fields of science, vocational training and culture as far as possible throughout life (educational biographies). In addition, the state-sponsored schools serve as reference points for expat communities and represent the educational ideals of the respective country.

In the field of education, the countries surveyed here are particularly active at two levels. Primarily, schools abroad that follow the curricula of the respective country are supported. This support includes a wide range of measures, from direct management by a central agency, to the secondment of teachers, to the recognition of degree equivalence. In most cases, the schools are not only intended for the education of expatriate children, but are also designed to be places of intercultural dialogue and to provide children from the host country and other third countries a high-

quality school education. On the other hand, most cultural institutions support language teaching and the taking of language examinations at foreign schools. The provision of teaching materials and the further training of teachers are also frequently-chosen instruments.

3.1 Key National Instruments and Actors in International Educational Policy:

Germany: The Zentralstelle für das Auslandsschulwesen (ZfA) (Central Office for Schools Abroad) supervises 140 German schools abroad in 72 countries (Bundesverwaltungsamt, 2018, p. 24). ZfA also supports over 1,100 language diploma schools in 95 countries (Ibid.). In 2018, around 390,000 pupils took part in German lessons in these schools and around 74,000 of these took the DSD examinations (Ibid., p. 39). Both the German schools abroad and the language diploma schools belong to the PASCH school network together with almost 600 Fit schools, which are supervised by the Goethe-Institut. In total, the network comprises more than 1,800 PASCH schools in over 120 countries (PASCH, 2017). The Goethe-Institut, ZfA and the Pedagogical Exchange Service of the Secretariat of the Conference of Ministers of Education and Cultural Affairs (PAD) also support the placement and further training of teachers; the PAD places student teachers abroad.

France: France maintains the largest international school network in the world, which follow the French national curriculum. The Agency for French Schools Abroad (AEFE) is responsible for the pedagogical, human resources and financial management of nearly 500 French educational establishments in 137 countries. The schools have different management models: 74 schools are under the direct management of the AEFE, 156 schools run the AEFE and party organisations jointly and 264 schools run the partner organisations independently (AEFE, 2018). In addition, the Institut français supports French teaching abroad, for example by providing resources for teachers, promoting bilingual teaching or offering language exams.

Great Britain: About 3,700 independent schools worldwide call themselves "British schools" and follow a British curriculum, but not all of these are officially designated. The Department for Education (DfE) offers voluntary inspections for these schools. If they meet the quality control standards, they are allowed to carry the official title "British Schools Overseas" (BSO). As of August 2019, 166 schools in 53 countries were officially accredited as BSOs. In addition to the official accreditation by the Ministry of Education, there are other associations that support British schools abroad and ensure their quality (AoBSO, 2019). The British Council also offers teaching materials for teachers, supports study trips and gives teachers the opportunity to establish school partnerships through an online platform.

United States: In the US, the promotion of private American schools abroad is not part of public diplomacy. Instead, it is seen primarily as a service for American families abroad whose children do not attend schools at military bases. The Office of Overseas Schools therefore does not belong to the Bureau of Educational and Cultural Affairs discussed here, but is part of the Bureau of Administration, within the Department of State. In total, the office supports 193 private schools attended by 137,000 students. In particular, the quality of teaching and the safety of schools are supported financially (US Department of State, 2019). The Office of English Language Programs also provides resources for English teachers on the American English Web site and supports partner organizations in conducting language programs for youth.

Russian Federation: The Russian Federation does not have its own school network abroad, but supports Russian-speaking schools in its neighbourhood and Russian language teaching worldwide. In addition to the Ministry of Education and Science, the Rossotrudnichestvo promotion agency, which is represented in 80 countries in 20 embassies and over 70 Russian business and cultural centres, is mainly responsible for this promotion (British Council, 2018a, p. 26). For example, Rossotrudnichestvo supplied teaching materials to over 7,000 schools to support Russian language teaching (Smits, 2014c, p. 10). Training courses for Russian teachers are also offered.

People's Republic of China: In the school sector, China is primarily active in the form of the approximately 1,200 Confucius classrooms in 154 countries (*China Daily*, 2018). The headquarters of the Confucius Institutes in Beijing (Hanban) promotes classrooms in schools, provides teachers and teaching materials and supports the respective schools in cultural events (Hanban, 2015, p. 3). The China Education Association for International Exchange (CEAIE), founded in 1981, is also committed to the internationalisation of the Chinese education sector. On behalf of the Ministry of Education, it organizes, among other things, the exchange of Chinese and international students and teachers (CEAIE, 2016, p. 13).

Turkey: Like other aspects of Turkish ECP, the ruling AKP has taken increased control of education abroad. Many 'Gülenist' schools have been taken over by Maarif Foundation, which was established after the failed 2016 coup. The Foundation is now active in 52 countries, but does not have active schools in all of them. Maarif claims that it has 30,000 students in 270 schools in 35 countries (Stockholm Center for Freedom, 2019). The Turkic council also organises a number of educational initiatives with the other Turkish speaking countries in Central Asia. Many of these are in the pilot phase but are planned to grow rapidly.

Qatar: The Qatar Foundation International (QFI) is responsible for promoting the Arabic language and culture in schools. The flagship programme "Arabic Language and Arab Culture" (ALAC) is designed to support schools in the USA, Brazil, Canada, Great Britain and Qatar in offering Arabic lessons. In 2014, programmes were conducted at roughly 30 schools with around 3700 participants (Qatar Foundation, 2018). In the field of development cooperation, the Education Above All Foundation is active in the school and university sector. Together with international and local partners, it promotes, among other things, the training and further education of teaching staff and the establishment and reconstruction of schools and universities (EAA, 2017).

Table 2. Statistics on selected foreign school programmes (2018)

	Name	Schools Abroad	Students
DE	PASCH	1800	17,550 (2016)
FR	Agence pour l'enseignement français à l'étranger	496	356,000

UK	British Schools Abroad, including Council of British International Schools (COBIS)	171 official, 270 COBIS, 3700 affiliated,	167,000 (COBIS)
TUR	Maarif Foundation	270	33,000

2 Science and Higher Education Policy in Competition

A comparison of the countries surveyed shows that the internationalisation of science is without exception part of their research and development strategies. An "interplay of cooperation and competition" can be observed (Schütte, 2015, p. 146). On the one hand, it is becoming increasingly clear that the so-called "Grand Challenges", such as climate change or the fight against infectious diseases, cannot be solved on their own. A profound cooperation is therefore inevitable. On the other hand, the various actors are competing to be among the top scientific nations.

The mobility of students and researchers is therefore supported in both directions: On the one hand, highly qualified scientists and excellent students from all over the world are to be brought to the respective country. This "competition for the best minds" is intended to increase the internationalisation of universities and the innovative strength of research institutions, but also to attract qualified specialists either to their own country or at least to establish close ties with future decision-makers abroad. On the other hand, people of their own nationality should have the opportunity to learn and do research abroad. The aim is for the next generation of managers to develop important professional and intercultural skills in order to survive in a globalised world. The link with development policy and humanitarian objectives should not be underestimated. Many of the countries surveyed support scientific exchange and research cooperation with people from developing and emerging countries and crisis regions.

4.1 Key National Institutions and Actors in International Science and Higher Education Policy

Germany: The German Academic Exchange Service (DAAD) has a global network of 15 branch offices and 57 information centres in a total of 60 countries (DAAD, 2018, p. 14), in addition to its head office in Bonn and its capital city office with an associated artists' programme in Berlin. In 2018, over 145,000 students, graduates and scientists, including more than 50,000 foreigners, were funded by the DAAD (Ibid., 13). The Alexander von Humboldt Foundation combines the individual promotion of around 2,400 scientists each year with the expansion of a worldwide network of around 28,000 scientists from over 140 countries (Alexander von Humboldt-Stiftung, 2018, p. 38). The Foundation itself has no branches abroad.

France: Campus France has the mission "to internationally promote the French scientific model and France as a scientific location, to initiate international scientific cooperation and to promote the mobility of students, teachers and researchers" (cf. Schneider, 2015, p. 363). The

international network comprises 256 locations in 136 countries (Campus France, 2017, p. 46). The Institut français also offers university programmes, particularly in Africa. The Agency for French Schools Abroad (AEFE) supports graduates of French schools abroad in their studies in France.

Great Britain: With its scholarship programmes, the British government is particularly committed to promoting talented graduates in developing countries. In addition to some smaller programmes, the British government supports three large scholarship programmes: Chevening, Marshall (USA only) and Commonwealth Scholarships. In the academic year 2017-18, around 1,750 Chevening Scholarships (Chevening Scholarships, 2018, p. 5) and around 800 (down from 1600 two years prior) Commonwealth Scholarships were awarded (Commonwealth Scholarships, 2018, p. 20). In addition, the British Council supports internationalisation in the higher education sector, for example through the management of the Erasmus+ programme and the information page "Study UK". The UK higher education system has become increasingly reliant on foreign fees in recent years.

United States: The Office of Global Education Programs supports the EducationUSA network. This consists of 425 centres in over 175 countries, which offer advice on studying in the USA in embassies and consulates, as well as partner institutions (EducationUSA, 2018). In 2017, over 4.5 million young people and young adults took advantage of EducationUSA (U.S. Advisory Commission on Public Diplomacy, 2016a, p. 123). The best known initiative of American foreign policy is the Fulbright programs.

Russian Federation: The Russian government aims to massively increase the competitiveness of Russian universities and place them in international rankings. One example is the Russian Academic Excellence 'Project 5-100' to place 5 Russian universities in the global top 100 (Ministry of Education and Science, 2017). Despite significant expenditures, the University World News finds that Putin's plan has "failed badly" (University World News, 2018). Aside from this, both the cultural promotion agency Rossotrudnichestvo and the Foundation Russkij Mir, are active in foreign science policy. In cooperation with foreign universities, libraries and other educational institutions, the foundation, which is close to the state, promotes over 170 Russian centres (British Council 2018b). The Rossotrudnichestvo agency manages the "www.russia.study" website, which awards 15,000 scholarships annually to students from all over the world at 400 Russian universities (Rossotrudnichestvo, 2017).

People's Republic of China: The China Scholarship Council enables Chinese students to study abroad and international students to come to China through scholarships (Hartig, 2014, p.67). In 2018, around 63,000 foreign students were supported (*China Daily*, 2018). By 2020, the Council wants to enable 500,000 international students to study in China each year (d'Hooghe, 2015, p. 173). The China Education Association for International Exchange (CEAIE) also organises the exchange of Chinese and international students and professors on behalf of the Ministry of Education (CEAIE, 2016, p. 13). The Confucius Institutes of the Hanban are usually docked at universities in order to support the Sinology Department and offer language courses. At beginning of 2019, there were 548 institutes in 154 countries (Huang, 2018). China had planned to have 1,000 locations worldwide by 2020, but some locations in prestigious Western universities have been shut down recently due to fears of Chinese influence (Inter-Study, 2019); Smits, 2014b, p. 7).

Turkey: At the university level, the Council of Higher Education (YÖK) was established 1981 and designed to coordinate all higher education activities centrally, consisting of 207 universities throughout Turkey. The Türkiye Scholarship serves as Turkey's flagship programme to attract foreign students, and advertises in 20 languages and had over 145,000 applicants in 2019 (YTB, 2019). Under the auspices of the Turkic Council, The Orkhun Exchange Program (currently in the pilot phase) accepted 43 students of member universities from the politics and IR departments utilised the programme during 2017/18. It is planned to 'increase substantially' this year (Yükseköğretim Kurulu, 2019).

Qatar: One of the most important initiatives to promote scientific exchange with the world is the construction of Education City, a 14 km² educational city on the outskirts of Doha. Today, branches of six American universities as well as a French and a British university are located there. Foreign universities receive generous financial support from Qatar: according to American sources, the six US institutions alone received around 320 million US dollars in funding in 2014 (*The Washington Post*, 2015). Despite the large financial incentives, some universities have had difficulty recruiting professors and so often have to rely on short-term teaching (Lewin, 2008).

Table 3. Foreign University Student Enrolment

	2012	2013	2014	2015	2016	2017
China	327659	355629	352872	396531	442431	489172
France	271399	228639	235123	239409	245349	323933
Germany	282201	301350	321569	340305	358895	358900
Qatar	7154	8509	10078	10509	10788	11034
Russia	173627	174000	213347	226431	243752	296176
Turkey	38590	54387	48183	72178	87903	125000
United Kingdom	427686	416693	428724	430687	432001	501045
United States	740482	784427	842384	907251	971417	1078822

Figure 2. Foreign University Student Enrolment

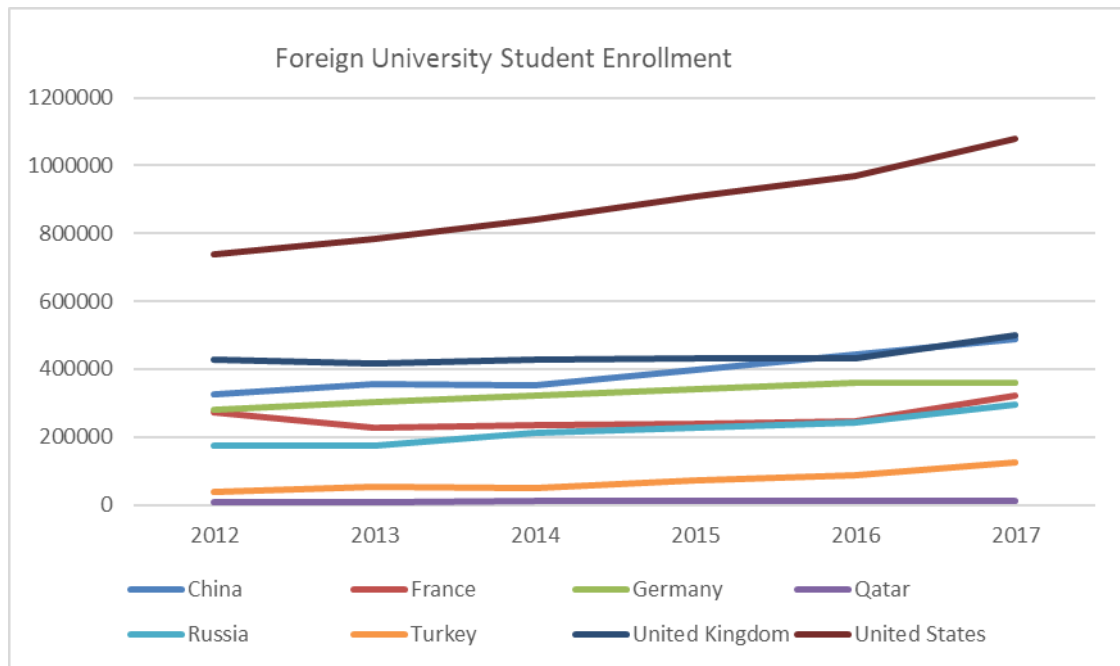


Table 4. Foreign Students as a Proportion of Total University Students

	2012	2014	2017
China	0.010055	0.008417	0.011085
France	0.118189	0.0984	0.124126
Germany	0.106491	0.1104	0.11794
Qatar	0.41434	0.39905	0.352783
Russia	0.021749	0.0305	0.056859
Turkey	0.008864	0.008787	0.016667
United Kingdom	0.171364	0.182	0.211439
United States	0.035271	0.0428	0.054874

Figure 3. International Students as a Share of Total Enrolment

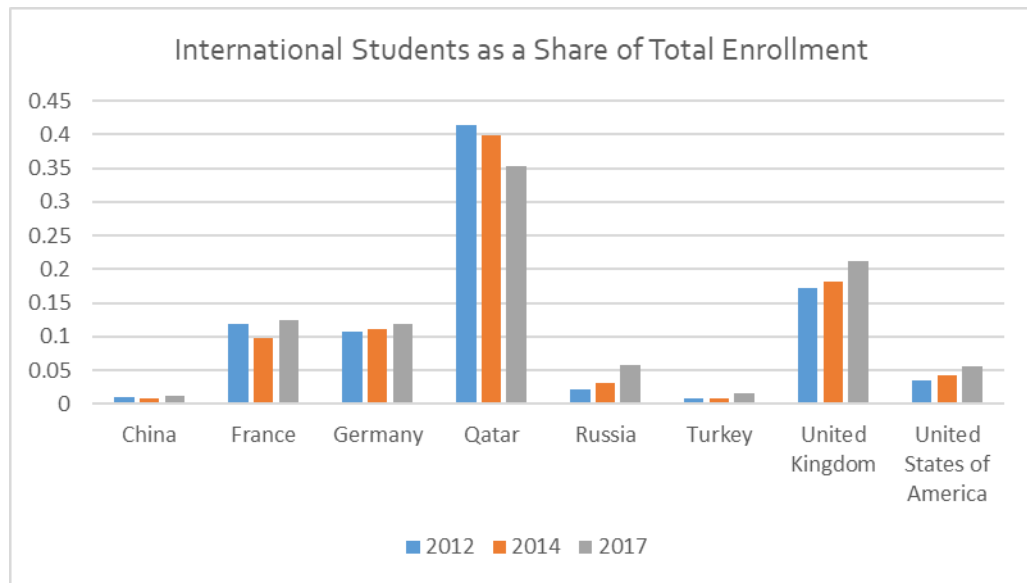


Table 5. Statistics on International Education Promotional Programmes

Programme	Countries Active--2015	Countries Active--2017	Participants 2015	Participants 2017
Alexander von Humboldt Stiftung (DE)	140	140	899	861
Deutscher Akademischer Austauschdienst (DAAD) (DE)	181	200	127,039	139,758
Campus France (FR)	121	136	33,773	29,766
Chevening Scholarship (UK)	150	160	1800	1750
Commonwealth Scholarship (UK)	43	43	1641	824
Fulbright Scholarship (USA)	165	180	8769	7585
China Scholarship Council (CH)	109	180	-	-
Rossotrudnichestvo (russia.study) (RU)	-	-	15,000	15,000
Turkiye Burslari (TU)	-	167	40,000	-
Qatar Foundation (QT)	3	5	2520	3700

5 Media and Communication in Comparison

Over the past two decades, competition between foreign media has intensified more than in any other area of external cultural policy. At the beginning of the 2000s, for example, there were only three foreign television stations in English ten years later, more than 30 stations from various countries were already courting an international audience (Maaß, 2013, p. 13). The Russian and Chinese governments in particular have been investing massively in the expansion of foreign media since the mid-2000s, also to respond to the dominance of Anglo-American media worldwide. This includes the promotion of their respective news agencies. However, an international comparison shows that all foreign broadcasters are intensifying their activities primarily in crisis and conflict regions. Today, the foreign media are far more than just mediators of a national perspective; they are

actors in a global dialogue of values and competitors in a competition for international interpretative sovereignty. Deutsche Welle even calls this competition a "war of opinions" (DW, 2017b).

This competition is also increasingly being conducted online. Not only do the foreign media presented here play a major role; private news companies and individual Internet users can also share information, but also false reports or conspiracy theories, globally with a single click - in some cases with dramatic consequences. And although the term "fake news" has only dominated political and social debate since the controversial 2016 American election campaign, it is basically part of an old phenomenon—propaganda. Through social media and mobile devices, however, this reaches a previously unknown range (cf. 10.7). This has become particularly clear with the publication of the Mueller Report on Russian interference in the 2016 elections, which detailed an elaborate influence campaign on the US election using digital media.

News agencies are also an important component of foreign media. As one analyst describes, "news agencies are rarely in the public eye. Yet they are one of the most influential and at the same time one of the least known media types. They are key institutions of substantial importance to any media system. They are the invisible nerve centre that connects all parts of this system" (Segbers 2007, p.10). For this reason, news agencies are a new addition to this 2019 report. Paralleling general analysis of 'soft power', the most significant news agencies are located in influential countries (AP in the US, AFP, in France, Reuters in the UK, and dpa in Germany). These are widely considered the most reliable agencies, and tend to be independent or only loosely affiliated with the state. However, rising powers are also focussing on their own alternative news agencies to spread information. While some have grown, they also face accusations of bias and perceived instrumentalization that can harm their credibility.

Table 6. Key Figures regarding Foreign Media²

News Outlet	Languages 2015	Languages 2017	TV audience 2015 (mil.)	TV audience 2017 (mil.)	Radio audience 2015 (mil.)	Radio audience 2017 (mil.)	Budget 2015 (mil. EUR)	Budget 2017 (mil. EUR)	Employees 2015	Employees 2017
CGTN	6	7	-	-	-	-	1840	2000	-	-
France Media Monde	14	15	41	120	42	120	242	266	1700	1700
DW	30	30	66	85	40	36	287	326	3000	2900
Al Jazeera	6	6	-	-	-	-	500	-	4000	3000
RT	6	6	70	95	-	-	231	293	1000	-
TRT	3	4	-	-	-	-	51	-	-	-
BBC World	29	40	91	95	148	160	350	300	1500	1514
Voice of America	45	45	236.6*	275.2*	-	-	189	51	1087	1867

*combined TV and radio audience

Sources: China: DW, 2017; Others: own data of each publication's websites

² 2017 is used as the comparison year due to the fact that it is the most recent year for which data is most available.

5.1 Key National Institutions and Actors in Foreign Media

Germany: Deutsche Welle (DW) uses television, radio and online services to reach an international audience. The foreign broadcaster is active in German and 29 other languages. A 24-hour TV programme is available in English, German, Spanish and Arabic. Around 1,500 permanent employees and 1,600 freelancers from 60 nations work at the DW head office in Bonn and at the Berlin location (Deutsche Welle, 2018). In 2017, Deutsche Welle received around 338 million euros in state funding (including DW Academy and project funding) and had expenditures of around 355 million euros (British Council, 2018a p. 21). As of 2019, DW's various services attracted 197 million weekly user contacts. Online, the most important platforms are Facebook, YouTube, and Twitter. DW has grown particularly strongly in the digital Arab world. In addition to the DW-Arabic channel, special programmes such as ShababTalk, the Albasheer Show and Sulta5 are the main channels with which DW reaches a wide audience. The German news agency dpa is one of the most significant worldwide. Originally founded in 1949, it currently has 1000 journalists worldwide, 54 offices, and nearly 140 million euros in revenue (dpa, 2019). It operates in 4 languages, and transmits roughly 600 stories and 1200 images per day.

France: France Médias Monde brings together the France 24 television channel and the two radio stations Radio France Internationale (RFI) and Monte Carlo Doualiya (MCD) under one roof. France 24 is a 24-hour news channel that broadcasts its programme on three channels in French, English and Arabic (Delcambre, 2016). RFI can be received in French and 13 other languages (RFI, 2017). MCD is broadcast in Arabic in the Middle East and parts of Africa. France Médias Monde received government funding of around EUR 266.5 million in 2015 and has a weekly reach of around 120 million TV and radio users. The websites of France Médias Monde had around 35 million visitors in 2017, an increase of over 35 percent compared to 2014. The number of subscribers to Facebook and Twitter has grown to more than 60 million subscribers (France Médias Monde, 2019). France also supports the international channel TV5Monde. The programme is broadcast in French and offers subtitles in 14 languages. Every week, TV5Monde reaches around 60 million viewers (TV5Monde, 2019). Founded in 1835, the French news agency AFP is the world's oldest news agency and the only non-Anglophone member of the "big three" news agencies (the other two of which are the US' Associated Press and Britain's Reuters). It has bureaus in 151 countries in 201 locations, with regional headquarters in Nicosia, Montevideo, Hong Kong, and Washington, D.C. AFP transmits stories, videos, photos, graphics in French, English, Arabic, Portuguese, Spanish, and German (AFP, 2019). It has over 1700 journalists across its offices and transmits 3200 stories and 3000 images per day.

Great Britain: BBC World Service's radio, television and online services are available in 29 languages. As of 2018, the station's radio, television and online services were available in a total of 40 languages (BBC, 2017). According to the station's own figures, its weekly audience has risen from 166 million (2011) to 372 million (2017) over the last five years, with the largest markets being in Nigeria and India (BBC, 2018, p. 8). The offices of the BBC World Service are located at the BBC headquarters, the Broadcasting House in London. Around 65 percent of the more than 1,500 BBC World Service employees work there, while around 35 percent support the station in its field offices (BBC, 2016a, p. 5). In fiscal year 2017/18, the BBC World Service had a budget of around 300 million euros, down from 350 million two years prior (BBC, 2018). In the broadcasting sector, around 95 million TV viewers and around 160 million radio listeners were reached each week in 2017/18. The online offerings are used

by around 42 million people (BBC, 2018, p. 56.). The international news agency Reuters is a private company, originally founded in 1851, and incorporated into Thompson Reuters in 2008. It distributes news in 12 languages, including English, French, German, Italian, Spanish, Portuguese, Russian, Urdu, Arabic, Japanese, Korean, and Chinese. Reuters has over 2500 journalists spread across its 200 worldwide offices. It distributes 5480 million stories, 2110 images, and 320 videos per day (Reuters, 2019).

United States: The U.S. Agency for Global Media (USAGM) (Formerly The Broadcasting Board of Governors or BBG) is the supervisory authority for five American media organisations: The Voice of America (VOA) offers online services, radio and television broadcasts in a total 45 languages (US Advisory Commission on Public Diplomacy, 2018: 146). The Middle East Broadcasting Network (MBN) consists of Alhurra Television and Alhurra Iraq Television, Radio Sawa and Afia Darfur as well as several online platforms. Radio Free Europe/Radio Liberty (RFE/RL) can be received in 25 languages across the continent. Radio Free Asia (RFA) broadcasts in 9 languages in 8 Asian countries. The Office of Cuba Broadcasting (OCB) offers online services, radio and television broadcasts in Cuba. The BBG broadcasts in 100 countries and 59 languages, reaching an audience of 278 million people (Bonazzo, 2019). At the end of 2016, the "National Defense Authorization Act for Fiscal Year 2017" was passed, which dissolved the BBG's supervisory body (Elliott, 2016). President Trump recently appointed Michael Pack to head the agency, arousing fears that it may become "Trump TV" (Ibid.). In terms of news agencies, the Associated Press (AP) is one of the world's largest, with 250 locations and over 3200 employees (Associated Press, 2019). The private, not-for-profit cooperative was founded in 1846 and took over a dominant position in the US market when its main competitor, United Press International, implemented significant budget cuts in 1993. More than 15,000 clients use its multimedia services and its website claims that "more than half the world's population sees our content every day" (Ibid.). It creates content in only three languages (English, Spanish, and Arabic), but still is among the world's largest producers of news, with an average of 2000 stories, 2740 images, and 190 videos distributed per day.

Russian Federation: The television station RT (formerly Russia Today) broadcasts 24-hour news channels in English, Spanish and Arabic, RT America from Washington, RT UK from London and two documentary channels in Russian and English. RT plans to launch a French offshoot in December 2017 and a German TV channel in 2018. In addition, online platforms are offered in English, Russian, French, Spanish and German. Reliable figures on RT expenditure and reach are not available. RT states on its website that it will spend around 293 million euros (17 billion roubles) in 2017 (RT, 2016). According to its own figures, RT reaches around 95 million TV viewers worldwide every week. With around tens of millions of website visitors and billions of YouTube views, RT is the largest non-Anglo-Saxon media network (RT, 2017). Sputnik News is the online news agency and radio station of the news agency Rossija Sewodnja. According to its own figures, 130 editorial offices in 34 countries produce 800 broadcasting hours per day in 32 languages. The editorial offices in Washington, Cairo, Beijing and Montevideo operate 24-hour news tickers (Tota, 2015; Deutsche Welle, 2017, p. 16). The news agency TASS is Russia's oldest and most prominent. It was originally founded in 1904 and existed throughout the Soviet period with affiliated agencies in all other members of the USSR. It was renamed Information the 'Telegraph Agency of Russia' (ITAR-TASS) in 1992, but reverted to its old name in 2014. It has 1,500 employees with 70 regional centers and offices in Russia, and 68 foreign bureaus in 63 countries. It is entirely owned by the Russian government. It operates in both English and Russian and distributes over 100 images and news items per day (TASS, 2019).

People's Republic of China: CCTV offers channels in French, Spanish, Arabic and Russian in addition to the Chinese channels (Zhang, 2011, p. 59). In 2012, CCTV America was established to produce program specifically for North and South America (Shambaugh, 2015, p. 103). In January 2017, the new global media platform China Global Television Network (CGTV) went live. By 2018, it was funded with nearly 2 billion euros per year, and is active in 171 countries (CCTV, 2019). It includes 6 TV channels, 3 overseas sub-stations, 1 video news agency and 'new media clusters' (Xinhua, 2019). China Radio International is available online in over 60 different languages from 70 overseas locations (Feng, 2018). The Chinese government plans to create a media behemoth by merging CCTV, CGTN, and CRI (Ibid.). The English-language newspaper *China Daily* has been publishing an American, a European, a Latin American and an African edition since 2009 and now reaches a combined print, online and mobile readership of 150 million (Hefele et al., 2015, p. 69; China Daily, 2019). The monthly publication *China Watch* is available in Europe and the USA as a newspaper supplement in *The Washington Post* and *The Daily Telegraph*. The *China Daily* homepage and printed copies of the newspaper reach 45 million readers (China Daily, 2016). Xinhua news agency is China's largest, creating content in 8 languages (Chinese, English, Spanish, French, Russian, Portuguese, Arabic, and Japanese). Originally founded in 1931 as the 'Red China News Agency', it currently employs about 3,000 journalists, 400 of them abroad in 100 countries (Shambaugh, 2015, p. 102). The agency plans to maintain 180 offices worldwide by 2020 and serve around 80,000 customers with more than 1,000 foreign correspondents (Hefele et al., 2015, p. 69). In 2018, it was required by the United States Department of State to register as a foreign agent.

Turkey: Turkish media suffers from a perceived lack of credibility, which is largely due to outlets being closely tied to the political and business elite. As the Open Society Foundation writes, "because television [in Turkey] is not usually a sustainable business, media outlets are either backed by political circles or are part of larger companies, the owners of which have invested in other sectors and use the media only as a tool with which to pursue their business interests (Dragomir, 2005). For example, Turkish Radio and Television Corporation (TRT), which operates 14 TV channels and 19 radio stations in Turkish, English, Arabic, Azeri and Kurdish, is legally required to pursue the national interest. Anadolu news agency, Turkey's largest, was founded in 1920 and is a member of The European Alliance of News Agencies. It publishes in 13 languages (Turkish, English, Arabic, Russian, Bosnian-Croatian-Serbian, French, the Kurdish dialects of Kurmanji and Sorani, Albanian, Macedonian, and Persian, Indonesian and Spanish). It produces roughly 1650 stories, 2330 images, and 400 videos per day. Anadolu receives heavy subsidies from the Turkish state, and has now been officially acquired by the government.

Qatar: The media group Al Jazeera Media Network (AJMN) includes numerous television stations that broadcast news, documentaries and sports coverage in Arabic, English and in the Balkans in Bosnian, Serbian and Croatian. In the online sector, AJMN is primarily active with the AJ+ channel, which is aimed primarily at a younger audience through an innovative format and a high level of interactivity. AJMN also maintains several Internet platforms, a training centre (Al Jazeera Media Institute) and a think tank (Al Jazeera Centre for Studies). AJMN has around 3,000 employees worldwide and, according to its own figures, had expenses of around 500 million euros in 2016 (Al Jazeera, 2019). According to its own figures, Al Jazeera has potential reach of "more than 310 million households in more than 100 countries" (Ibid.). In 2017 it was forced to close several locations after the political crisis with Saudi Arabia. Qatar News Agency is the primary news agency of Qatar. It was first established in 1975 by royal decree and writes in both English and Arabic. QNA has 500 employees

and is a member of the Federal of Arab News Agencies. It was the victim of a major hacking in 2017, which the Qatari government accused the United Arab Emirates of perpetrating (*Gulf Times*, 2017). It only returned to Twitter earlier in mid-2018 and currently has 22,800 followers.

Table 7. Comparison of International News Agencies

Country	News Agency Name	Offices	Journalists	Stories per day	Languages
China	Xinhua	180	1000	_ ³	8
France	AFP	201	1700	3200	6
Germany	dpa	54	1000	600	4
Russia	TASS	138	1500	100	_ ²
Turkey	Anadolu	108	3000	1650	13
United Kingdom	Reuters	200	2500	5480	12
United States	AP	250	3200	2000	3

6 New Media in International Comparison

Foreign and cultural ministries – and many intermediary organisations – are developing strategies which prominently feature the role of new technologies and media platforms. Information can be shared instantaneously, directly, and cost-effectively with target groups. Interactive formats enable the participation of previously-known and new target groups. In an international comparison, it is clear that organisations use social media to set up and maintain expert and alumni networks internationally. Especially at a time when the sustainability of cultural and educational initiatives is being questioned, contacts abroad can be maintained through these means.

Foreign broadcasters are also active on social media platforms such as YouTube, Facebook, Twitter and their own websites. While these figures can be compared, it is extremely difficult to determine ranges of coverage and budget data in a comparable way. For reasons of comparability, only one channel was examined for each of the foreign broadcasters examined, which was operated under the name of the media broadcaster. The rapid expansion of the Russian provider RT is particularly noticeable here. In the field of communication and media, Russian ECP places a clear emphasis on this distribution channel and thus advertises offensively ("Most watched news network on YouTube"). These figures are also achieved through relatively high output. Many of these articles do not seem to have been researched journalistically. Many of the particularly popular videos are amateur videos, some of which are also taken from other sources (Ortung, Nelson und Livshen, 2015). Unlike the BBC, for example, RT is not required by law to delete content after a certain period of time. In addition, unlike Deutsche Welle, for example, RT regularly places advertisements on its

³ Data unavailable.

YouTube channels, placing videos from RT at the top of search queries. The quantitative range comparison should therefore be viewed with caution. Nevertheless, with this strategy RT aims to maximise attention to its political and opinion-forming content.

6.1 Key Actors and Instruments in New Media

Germany: The BMWi's 2017 digital agenda stressed the importance of digital communication in culture, pointing out that "Education, research, science, culture and media are central fields in the application of new digital technologies" (Bundesministerium für Wirtschaft und Energie, 2019). But even before the agenda was published, the Federal Foreign Office and many of its missions abroad used social media such as Facebook, Twitter, YouTube, Instagram and blogs (Keppler, 2014, p. 7-8). The same applies to intermediary organisations, which often promote other offers in addition to a detailed Internet presence that are intended to facilitate digital participation through interactive applications. In an internal digitisation strategy in 2013, the Goethe-Institut emphasised that "digital means an opportunity, not a threat to the mission of mediation" (ibid., p. 12). In the area of flight and migration in particular, intermediary organisations are making use of the opportunities offered by the new media - not least because they can reach many refugees directly via smartphones and tablets (Lehmann, 2016, p. 24).

France: As part of the "diplomatie numérique" (digital diplomacy), the Ministry of Foreign Affairs has been continuously expanding its online presence since 1995. Every month, 1.5 million users visit the site France Diplomatie (Ministère de l'Europe et des Affaires étrangères, 2019). Since 2009, the best-known social media, including Facebook and Twitter, have also been used. There, not only the offers of the ministry and its partner organisations are promoted, but also foreign policy issues are discussed publicly. French diplomats have therefore been receiving social media training as part of their training since 2011 (MAEDI, 2016). France published a new digital strategy in December 2017 that advocates the "promotion of human rights, democratic values and the French language in the digital world" and "strengthening the influence and attractiveness of French digital players" (Ministère de l'Europe et des Affaires étrangères, 2017).

Great Britain: The British Foreign Office is trying to act as a "global authority in the theory and practice" of digital diplomacy. Digital diplomacy is defined as the possibility of "solving foreign policy problems through the Internet". [...] it is conventional diplomacy through another medium" (Pamment, 2013, p. 21). In recent years, the Ministry of Foreign Affairs has developed the "Digital by default" strategy with the aim of making as much information and services as possible available online. In order to save personnel costs and increase the efficiency of the embassies, personal contact with officials of the Ministry should be reserved for individual cases (Pamment, 2016, p. 203). Former FCO Communications Director Hugh Elliott stated in 2017 that "today, to be known, you must be digital" (Elliott, 2017).

United States of America: Like public diplomacy as a whole, the expansion of online services following the attacks of September 11 became the new priority of American policy (Cull, 2013, p. 129). Later, the international popularity of President Barack Obama was used to advertise America on the social media (ibid., p. 133). Many of the Foreign Ministry's offices have developed a "digital first"

strategy. And the Center for Global Engagement, formerly known as the Center for Strategic Counterterrorism Communications, is another example of the use of the Internet as part of public diplomacy. The Center is responsible for uncovering and preventing the spread of Islamist propaganda on the Internet. The discussed merger between the Bureau of International Information Programs and the Bureau of Public Affairs is due to the lack of distinction between domestic and foreign audiences in the digital age. "The distinction doesn't really make sense in a world where there's no digital borders," said Shawn Powers, a former head of the Advisory Commission on Public Diplomacy (Gramer, 2018).

Russian Federation: The Russian state is increasingly using social media to influence public opinion at home and abroad. Since the early 2010s, the websites of the state media, but also YouTube and Facebook, have been used much more for external communication. At the same time, pro-Russian blogs are actively supported and special pages are used specifically for external communication (Aro, 2016, p. 125). The use of "trolls" abroad is viewed particularly critically. According to insider reports, up to 1000 Russians are supposed to work in the Internet Research Agency, a so-called "troll factory" in St. Petersburg (Chen, 2015).⁴ This gained particular notoriety due to the efforts in the 2016 US Presidential elections, which were widely documented in the Mueller Investigation.

People's Republic of China: The Internet is described in China as the "fourth front" for access to a Western mass audience (Ohlberg, 2014, p. 337). International platforms such as Facebook, Twitter and YouTube are mainly used by the Chinese foreign media such as China Daily and CCTV. The Twitter presence of China Daily (4.1 million) and Xinhua (27 million) show China's efforts to reach an international audience (Twitter, 2019). Since Western social media are consistently blocked in China, the Foreign Ministry has no official Twitter or Facebook account, although specific missions, such as those to the UN or EU, do (Ohlberg, 2014, p. 435-436; Twitter, 2019). Many Chinese organizations abroad, such as Confucius Institutes and Chinese cultural centres, are present on the platforms. Private actors also play a greater role in China's external image as a result of the new technologies (d'Hooghe, 2011, p. 23).

Turkey: The Turkish government has made efforts to incorporate digital tools into its diplomatic efforts. The efficient e-visa programme is particularly notable, social media usage from consulates and embassies is also rising, and roughly 5 million people visit the MFA webpage (Rep. of Turkey Ministry of Foreign Affairs, 2016). Use of new media is particularly important in mid-size countries like Turkey, for which "the effective usage of digital diplomacy" is the most efficient way to spread influence (Aslan & Göksu, 2016). Domestically, the Turkish government has cracked down in dissenting opinions and online 'influencers' (Osterlund, 2019). Smaller digital-born brands continue to operate freely, and provide alternative perspectives. OdaTV, T24, Diken, Duvar, Bianet, Medyascope TV, Ahval News, which is funded by Al Arab Publishing, Journo, and ArtıTV. However, these are all largely domestic-oriented institutions and are not significant players in ECP.

⁴ Through provocative online comments, the so-called trolls are intended to influence public discussion, disseminate false information and intimidate and silence critics with negative, aggressive comments (Aro, 2016, p. 121).

Qatar: As with other international media, Al Jazeera is also extremely present on the Internet, with 5.4 million Twitter followers (Twitter, 2019). But Qatar also uses new media in other areas of its external cultural policy. The QFI launched the online campaign "I Speak Arabic" to make Arab culture and language comprehensible. The focus is on people who have learned Arabic as a foreign language. Under the hashtag #ISpeakArabic these YouTube videos can be uploaded and tell from a personal perspective what language means for their lives and careers. On the website www.ispeakarabic.com, the Foundation also provides resources to help people promote Arabic teaching in their personal environment (QFI, 2017b).

Table 8. Social Media following of Foreign Media (English)⁵

Country	News Outlet	Twitter Followers	YouTube Subscribers	Facebook Likes
China	CGTN	14,300,000	904,937	89,300,000
France	France24+RFI	5,300,000	949,086	13,300,000
Germany	Deutsche Welle (News+Documentary)	272,800	1,573,000	2,200,000
Qatar	Al Jazeera	5,400,000	3,795,801	12,100,000
Russia	RT	2,900,000	3,642,194	1,500,000 ⁶
Turkey	TRT World	196,600	480,496	-
United Kingdom	BBC World	27,500,000	5,069,815	6,200,000
United States	Voice of America	1,600,000	515,611	11,100,000
United States	CNN International	8,800,000	7,430,978	17,600,000

⁵ Current as of September 2019.

⁶ RT UK and America combined.

7 Conclusions of the Report

The geopolitical conditions, priorities and instruments used in external cultural policy vary substantially from country to country. The patchy data situation makes comparisons even more difficult, and even if comprehensive data were available, many scholars observe that 'soft power' is a necessarily nebulous and difficult-to-quantify term (Portland, 2018). Table 7 gives an overview of which aspects of ECP should be of top concern for German policymakers. The following observations can be made:

- Germany is well positioned in all areas of ECP. Science and education are strong, but not yet world-leading. The Goethe-Institut's long-term strategy is also paying off in the area of culture and language.
- Like Germany, France is also committed to continuity in its policies. Both countries operate with more or less constant state budgets, which allow them to be well positioned in the more traditional areas of ECP (language, cultural exchange, science). The 'new players' – in particular China, Russia, and Turkey – have rapidly expanded their ECP sectors, but thus far have not had a discernible influence on the strategy of the Europeans.
- The UK retains significant cultural assets with entities such as the British Council, but the future is uncertain. Following the decision to leave the EU in June 2016, the British Council is committed to a further opening of the UK and close cooperation with European educational and cultural institutions. It remains to be seen how cultural links will be affected, especially in the advent of a disruptive 'no-deal' Brexit.
- The US, which had withdrawn strongly from traditional ECP since the end of the Cold War, is trying to find more flexible formats through programs such as American Spaces, but as far as the State Department is concerned it has been in a situation of uncertainty since the beginning of the Trump administration. The reorganizations of foreign media in particular demonstrate possible shifts.
- Turkey has shown some regional influence in ECP, but is plagued by perceptions of increased government control and domestic dysfunction. Erdoğan firmly believes in ECP continues to exert control over culture, education, and media. Still, the private cultural sphere exists in a 'parallel universe' to the public sphere.
- Qatar could once be regarded as a rapidly-rising newcomer on the global ECP stage. However, the country is under high foreign policy pressure, has drawn international criticism recently, and relies excessively on financial incentives to draw substantial Western cultural institutions to its territory. It is unclear if it can establish a self-sustaining cultural sector.
- Russia and China show that the ECP as a foreign policy instrument is developing a new dynamic in the age of globalisation. Both are consistently building up their ECP and using it in the sense of an offensive geopolitical positioning. They are taking new "budget-friendly" paths: China, for example, by "docking" the Confucius Institutes to universities abroad, Russia by expanding online distribution channels for their media presence abroad. In recent years, both have experienced significant backlash from the US in particular. RT has been labelled a 'foreign agent' and several prominent Confucius Institutes have been closed by host institutions.

- In the field of communication and media, the environment continues to develop dynamically. The sheer number of comparatively new providers and their growth strategies presents Germany with new challenges. In contrast to other foreign broadcasters, which did not emerge until this millennium, Deutsche Welle can draw on decades of expertise. This applies in particular to the provision of high-quality content – a factor that should not be underestimated. In order to remain competitive in the digital arena as well, investments in existing and innovative technologies need to be extensive. Still, this should not come at the expense of other 'tried-and-true' diplomatic measures.

What are the opportunities for increasing the influence of German ECP of the future? The 'Take away' column of Table 7 provides an overview of the factors that Germany should take into account when developing its foreign cultural and educational policies.

- ECP has only grown in importance due to globalisation and digitalisation. In line with the multipolar world situation, we are witnessing competition between an increasing number of global actors.
- Every country examined utilises very different strategies, based on a unique array of instruments. What many have in common, however, is that all are continuing efforts to expand the reach and influence of their ECP – there are few signs of retreat in any country. The general development suggests that ECP is by no means regarded solely as a "soft" policy area. On the contrary – particularly in times of increasing crises and conflicts – it seems to be seen as an important component of foreign policy instruments.
- Numerous quotations from heads of government and ministers worldwide further demonstrate the importance of ECP in the mind of policymakers. From Erdoğan to Macron, world leaders recognise the importance of external cultural policy and are making vigorous efforts to increase their international influence through it.
- This is particularly true in the area of communication and media, where digital distribution channels allow for much more dynamic changes than is conceivable in the traditional ECP areas.
- The ECP as a component of foreign policy is a nationally dominated field. Cross-border cooperation has no tradition here and seems to be a marginal phenomenon so far. A unified European external cultural policy may be a promising tool in the future, but remains mostly unrealised.
- If Germany wants to maintain its good positioning, it must increase its funding and expand its activities in the geopolitically "contested" regions in particular. New methods can also be explored. One possibility would be European cooperation, in which the ECP - not least because of the promotion of the respective national language as a core objective - has so far played only a subordinate role. One option for pooling expertise is cooperation in the media sector. One example is the news platform InfoMigrants, on which France Médias Monde, Deutsche Welle and the Italian press agency ANSA jointly inform about the flight to Europe (<http://www.infomigrants.net/en/>).

Comparison Table 2. Key Features and Challenges

Country	Central Features	Challenges	"Take away" for Germany
Germany	Normative use of ECP to emphasize values, time honoured institutions (GI, DW, etc) strong acknowledgement of ECP as a crucial 'third pillar' of Germany foreign policy	Increasingly contested space of ECP from Russia, China Turkey, old alliances (US, US) no longer as assured as in the past, instability in neighbouring regions	Can reflect positively on its strengths, but fading alliances and resurgent geopolitical and normative challenges demand reemphasis on ECP worldwide
France	Strong presence in Europe and Near and Middle East, Africa; Francophonie; French as an official language of international organisations	Long-term reduction of state financing; Find new partners; English as lingua franca; loss of importance of French; decline of French teaching in schools; digital change	Close ties between cultural institutes and the diplomatic network; Involvement of the independent association Alliance Française for a nationwide offer Focus on selected target regions
Great Britain	English as <i>lingua franca</i> ; high demand for English courses; Cooperation with the British cultural and creative sector; High proportion of self-financing	Imposition of savings; Pressure to justify by government (evaluation / impact); Focus on business; Brexit consequences difficult to predict; regionalisation	Strong "brand" in cultural exchange; Language courses as cultural capital for economic use; Investment in new formats, e.g. mass online course to prepare for language tests
United States	Great attraction (culture, universities); English as <i>lingua franca</i> ; reorganisation of important agencies under Trump; Cooperation and co-financing as a basic model; Social media platforms almost exclusively American	Political uncertainty of the Trump era; weakening of the State Department; uncertainty in financing; coordination of private partners and quality assurance	Innovations in cultural exchange; language promotion through private partners; Fulbright programme as an international role model; Strong focus on geopolitical core regions
Russia	Instrumentalization of power politics; Targeted cooperation with sympathizers abroad; Focus on media; Massive investments in digitization	Allegation of influence and targeted disinformation; loss of Russian significance; hardly any exchange with Russian students; Credibility of the media doubted; credibility / criticism in Western countries	Broad audience through high online presence; clout of online campaigns; dissemination of information by individuals
China	Largest cultural network in the world; joint venture model; high demand for language courses; high	accusation of state influence and instrumentalization of culture; reach and influence controversial; 'Great Firewall	Rapid expansion through cooperation with partner institutions (including schools and universities);

	investments; broad expansion of digital communication as well	of China' makes exchange difficult	language teaching as a joint venture
Turkey	Strong ties and influence over Turkic countries; governmental control of many cultural institutions; 'lack of vision' and incoherence in ECP	Loss of prestige and appeal due to authoritarian turn; budget constraints with slowing economic growth; backlash abroad—particularly Europe	Contested normative values in Germany's 'neighbourhood'; influence over diaspora population within Germany's borders; potential continued cooperation in cultural initiatives with Istanbul
Qatar	High investments in culture and art; major events; Continued high media coverage; financing by the royal family; Digital infrastructure development	Establishment of a cultural industry by combining Western models with Arab traditions; Anti-Muslim climate and prejudices against Arabic; Loss of credibility; negative reporting	International dialogue through cultural centres and major events within country; cooperation with international partners; Potential for International Branch Campuses; online branding; overreliance on financial incentives

The study revealed a number of aspects which, in addition to increasing competition in the field of ECP, are gaining in importance and appear to be of considerable importance for further policy decisions:

- While the focus of this study is mainly on competition in 'analogue' space and the various forms of presence of cultural, educational and media institutions, ECP is increasingly taking place in less tangible spaces. Key issues here are digital 'echo chambers', government and corporate censorship as well as the targeted use of propaganda media such as the 'troll factories'.
- The advance of digitization can be observed in all areas of external cultural policy. Especially with regard to new social media and digital offers such as WeChat, new questions arise. The 'Great Firewall' in China and restrictive laws in other countries are at the same time examples of attempts to regulate and control the Internet – often under the guise of national security.
- ECP's intensive use by authoritarian states has prompted some observers to speak of a "hijacking of soft power" (Walker, 2017). Countries like Russia and China, but also Venezuela and Saudi Arabia, offer alternative narratives to the 'liberal-democratic' values of the West.
- The promotion of national culture continues to play a central role in European cooperation. Initiatives such as the European Cultural Diplomacy Platform or the European Union National Institutes for Culture (EUNIC) build on the commitment of national cultural institutions. Despite successful cooperation projects between individual cultural institutions, few activities are carried out at EU level and only a very limited common strategy is developed.
- The future role of the United States, which will have a decisive influence on the overall constellation of the West and thus on the strategy of Europe and Germany, can hardly be taken for granted. The concept of "soft power" may give way to a "soft vacuum".

- Civil society is treated very different depending on the country. It is oppressed by the state in some countries, instrumentalised in others, and even supported by arm's-length institutions in some cases. In many cases, hybrid arrangement can be observed: To the extent that civil society actors such as artists and creators of culture support the goals of the government, they enjoy a correspondingly high degree of freedom, while in other cases they suffer from extreme restrictions.

The last point demonstrates a very important desideratum in the research: the growing influence of regional and local actors (federal states, regions and cities) was not explicitly addressed. This also applies to many NGOs and foundations, cultural institutions, artists and cultural workers as well as to international organisations and agreements. The development of an internationally comparable evidence base for the ECP appears even more urgent than the expansion of the actors to be considered.

Despite the problems with data comparability and acquisition, the broad lines of comparative ECP can still be confirmed. Germany faces a strongly contested space in external cultural policy, but brings important elements to the competition. France retains strong and consistent presence in ECP, while the US and UK retain the global appeal of their culture and language despite political realignments. At the same time, the fast-rising powers of Russia, China, Qatar, and Turkey have shown a remarkable ability to expand their influence in ECP. However, they may face a backlash to their rise and are exposed to the risk of financial non-sustainability. This leaves Germany at a critical juncture in its investments in ECP. As core democratic tenets are being challenged throughout the world, and long-term partners withdraw from the international stage, Germany can increase its influence and spread its values through strategic and innovative investments in external cultural policy.

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Country reports

Egypt

Kenya

Serbia

The case of Egypt

List of Tables and Figures

Tables

Comparison Table 1	48
--------------------------	----

Figures

Figure 1. French Education Involvement in Egypt	50
Figure 2. Foreign Research Institutions and Think-tanks in Egypt	51
Figure 3. The UK Investment in Egypt	52
Figure 4. Proportion of language learners in cultural institutes	52
Figure 5. Scholarships for Higher Education	53
Figure 6. Number of Cultural Offices in Egypt	55

Egypt

Egypt's post 2013 government outlined a number of policy ambitions in Egypt 2030 Strategy. The primary goals of the cultural and educational policies are: restructuring the public education system, expanding access to tertiary education, and engagement in collaborative research projects. Such policies reflect the underlying goal of developing the "the knowledge infrastructure" through investment in education and science. Despite ambitious plans, some observers have noted that the spending allocations do not match the level of ambition laid out in the strategies. At the same time, there is a lack of emphasis on culture. The investment in culture remains nominal⁷ and the government does not seem to follow an integrated strategy. Other aspects of cultural policy have been largely determined by reactionary policies. Within both the media and cultural realm, the government has been cutting down on spaces for resistance through increased centralisation and, to a certain extent, surveillance. Three laws reflect this most: Law No. 70 of 2017 (NGO law), Law No. 180 of 2018 (the media law), and Law No. 175 of 2018 (the cyber-security law). Such regulations have at times been used as pretexts to facilitate censorship and repression.

The case study on Egypt shows that partner and competitor countries use different discourses to frame their external cultural and educational policy (ECP). While Western partners use the language of democratisation and development, countries like China and Russia engage in rhetoric which implies equal partnership and respect for Egypt's sovereignty. In this regard, China's approach is framed around the limitation of Western engagement in the country. For example, China adopts the language of "ancient civilisations" as a clear antithesis to the perceived approach of the West which implies "cultural hegemony" (Haddad-Fonda 2017a; Jianfeng 2018). Such eye-level approach is perceived positively by the Egyptian authorities. Other countries have followed suit with a strategic approach by aligning themselves with the objectives of the Egyptian government, usually in a mutually-beneficial arrangement. While Russia and China support Egypt in its development goals, the UK has found its role in supporting Egypt execute its large-scale education reform, and expanding of the UK's TNE education. France is involved in the administrative education reform (ENA). Although partner countries have a strong historical and cultural footprint in Egypt, a common dilemma is balancing their own cultural and educational goals, the relationship with the Egyptian government, and shrinking spaces for engagement while promoting Western liberal values. Thus far, this has sometimes meant reduced engagement with civil society or friction with the government.

⁷ The budget for youth, culture, and religion equals only to 2 percent of the total government expenditure (total budget 35.3 billion EGP) planned for 2018/19 (Egyptian Ministry of Finance 2018).

Comparison Table 1.

Country	Central Features	Challenges	"Take away" for Germany
Germany	<ul style="list-style-type: none"> - Decentralised approach and a variety of cultural organisations - Large scope of engagement in arts, cultural heritage, civil society, education, and research - Increased demand for German education and language (linked to migration) - Services linked to fairness and quality 	<ul style="list-style-type: none"> - Sensitive political landscape in the country 	<ul style="list-style-type: none"> - Reframe the narrative around cultural cooperation to promote open exchange - Reflect on engagement with civil society and expand cooperation on education - Expand engagement beyond urban centres and educated elites
France	<ul style="list-style-type: none"> - Long historical, economic, and cultural relationship - Culture as the main focus, policies implemented through IF - Francophonie - An extensive network of French educational institutions - strategic cooperation with government 	<ul style="list-style-type: none"> - Backlash from the rights groups following the increased France-Egypt military cooperation 	<ul style="list-style-type: none"> - Focused effort to link the language education to improved exchange in education and science
United Kingdom	<ul style="list-style-type: none"> - Strong historical ties - English as the most spoken language - Focus on income-generating activities and strategic cooperation (examinations and TNE) 	<ul style="list-style-type: none"> - Difficulties in framing its relationship with the current Egyptian regime 	<ul style="list-style-type: none"> - Invest in opportunities that are of importance to the Egyptian government
United States	<ul style="list-style-type: none"> - Provision of exchange programmes - Strong focus on programmes supporting higher education and scientific cooperation - Support to civil society (more limited now) - Concentrated media efforts (the Middle East Broadcasting Network) 	<ul style="list-style-type: none"> - US involvement closely tied to its foreign policy in the region - Negative perceptions of 'foreign meddling' and 'democratisation' efforts 	<ul style="list-style-type: none"> - Provide a more comprehensive and nuanced image of Egypt - Approach carefully 'democratisation' activities
Russia	<ul style="list-style-type: none"> - Relationship rooted in military and economic interests - Cultural cooperation is seen limited but strategic (often based on old Soviet ties) - Media engagement used as the primary instrument used 	<ul style="list-style-type: none"> - Low demand for language and decreased interest in educational exchange 	<ul style="list-style-type: none"> - Strategic approach - Calculated media strategy - An emphasis on the new media and social media
China	<ul style="list-style-type: none"> - A rapid expansion of cultural activities (linked to improved economic relations) - Focus on wider audiences and beyond the urban elites - A carefully crafted narrative and strategic approach to promote partnership and cultural proximity 	<ul style="list-style-type: none"> - The interest in Chinese language and culture is still limited 	<ul style="list-style-type: none"> - Expand access beyond urban centres and the elites - Expand exchange
Turkey	<ul style="list-style-type: none"> - Short-lived Neo-Ottomanist foreign policy after 2011 - the Yunus Emre Institute (YEE) remains the only cultural actor - Active promotion of the Turkish language but limited capacities (YEE) 	<ul style="list-style-type: none"> - Unstable political relationship between two countries - Fall of the Turkish influence after 2013 - hostile political landscape 	
Qatar	<ul style="list-style-type: none"> - Al Jazeera as the main instrument of Qatar's soft power 	<ul style="list-style-type: none"> - Qatar's ECP in Egypt is almost non-existent on the ground 	

1 Germany

ECP RECAP. German ECP is carried out by a number of arm's length institutions which are active across all elements of cultural policy. The main actor implementing Germany's cultural policy in Egypt is the Goethe Institut. Its focus is on the arts, civil society, and education. Another key actor is the historic German Archaeological Institute (DAI) which concentrates on research and restoration of cultural heritage sites. German language promotion is carried out through the German schools in Egypt, the Goethe Institut, the German University in Cairo (GUC) and German language departments at universities. The most important development is the increased interest for German schools and the demand growth in the Goethe Institut's language courses (from 3,500 to 20,000 students annually between 2015 and 2019). German education is perceived as high-quality and financially accessible compared to other international schools. In addition, the increased demand is linked to future education and employment opportunities in Germany. In the field of science and academia, Germany implements programmes in higher education and science by providing research, scholarships, and exchange opportunities through the German Egyptian Research Fund (GERF), German Egyptian Mobility Programme for Scientific Exchange and Excellence Development (GE-SEED), and the Transformation partnership programme. German foundations are also active in Egypt, but one closed down after NGO Case 173. Germany and Egypt have since signed an updated cultural agreement to include special provisions for German political foundations so that they can operate freely. Lastly, Germany's media presence comes in the form of DW Arabic. In general, Germany's educational and scientific engagement is well-received. However, the country has faced numerous challenges in its engagement with civil society and media.

- **10,000 students enrolled at German University in Cairo** (German University in Cairo 2019)
- **Deutsche Welle Arabic reaches 30% of weekly TV audience in Egypt** (Deutsche Welle 2017)
- **20,000 enrolled language learners at Goethe Institut** (Goethe Institut 2015; GR 2019), **3,561** issued language certificates in 2018 (German Federal Foreign Office 2019)
- **251,467 German language learners in the country** (German Federal Foreign Office 2019)

2 France

ECP RECAP. France has an expansive network of education and cultural institutions in the country, especially schools and universities. French stands out as the third most spoken language. Currently, the increased defence cooperation puts France in a strategic position of close proximity to the Egyptian government. Such position of influence may be utilized to promote French interests in other areas. One of the most interesting recent engagement is the support of the establishment of an administrative school for bureaucrats, ENAE, following the French ENA model, and supporting Egypt administrative reform. Most of the cultural work is done through Alliance Française and Institut Français which focus on (state). France is very present in science and academia with 5 research institutions and 3 bilateral cooperation programmes. On the media landscape, French presence is not as strong. France24 has a low visibility at the moment, but based on recent cooperation with local actors, a possible change of focus to Egyptian / Arabic audiences may be expected.

AN ESTABLISHED NETWORK OF EDUCATION INSTITUTIONS

Figure 1. French Education Involvement in Egypt

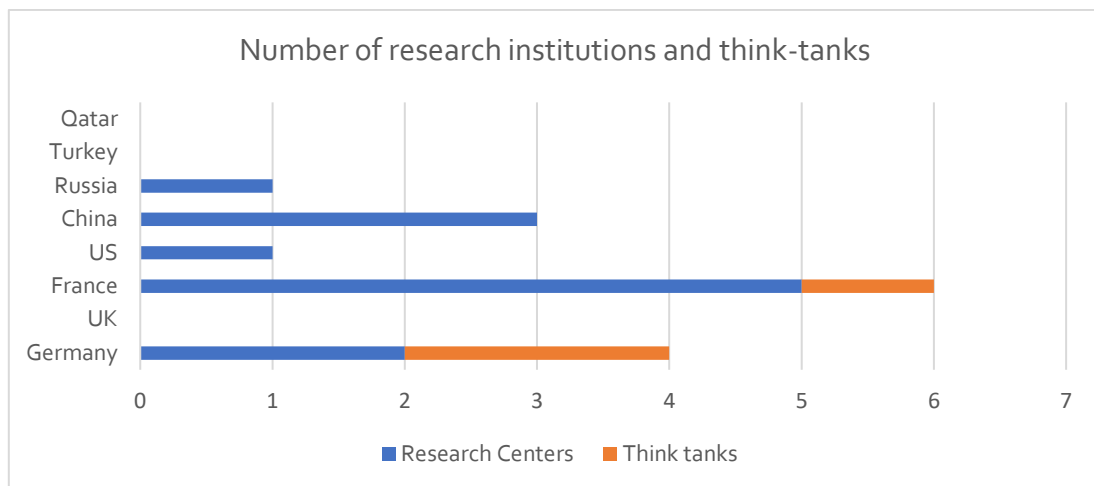
France has a very large education network in the country. Egypt is placed at the 8th position on French education worldwide. To illustrate: 13 schools offered French curriculum to 7,560 students in 2016. 50 bilingual schools have French as the main language of instruction for 37,000 students (see Figure 1) (Institut Français 2019b, 2019d). Another cooperation upgrade is the French support for the establishment of the Egyptian National School of Administration (ENAE). This comes in the context of the national capital project to modernise the Egyptian administration.

FRANCE: EDUCATION in EGYPT	
Pre-university	Tertiary
▶ 13 French schools 7,560 students	▶ 2 French universities, 12 FR-EG cooperation programmes 2,500 students
▶ 50 bilingual schools 37,000 students	2 Campus France scholarships
	2,000 outgoing Egyptian students (2015/16)

STRONG PRESENCE IN SCIENCE AND ACADEMIA

France has the greatest number of research institutions in the country (see Figure 2). These are mostly working on areas of historical relevance between Egypt and France, i.e. archaeology, law, and humanities. Additionally, France supports three bilateral cooperation programmes for Egyptian postgraduates and scientists.

Figure 2. Foreign Research Institutions and Think-tanks in Egypt

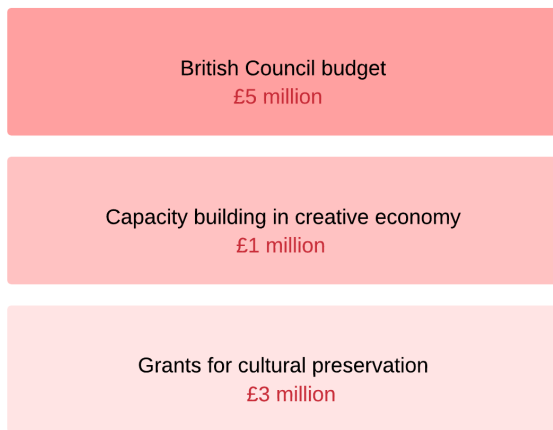


3 United Kingdom

ECP RECAP. Egypt is considered a priority country in British FCEP heavily with a heavy emphasis on education. The UK's involvement is strategic: it aligns with its own interests, while supporting the Egyptian government in their ambitions. The British Council supports examination to the wide network of private schools in Egypt. Moreover, expansion of TNE education in Egypt is one of the most important developments in education cooperation with the dual effect of supporting the expansion of British Education, while expanding access to higher education (a cornerstone of the new 2030 strategy). The UK can use education as a business model and directly benefit from UK universities going to Egypt. The UK's cultural influence is supported by the widespread use of the English which is the most spoken foreign language and mandated within public school curriculums. English proficiency can be a great advantage in the local job market and the link between the two is often emphasised by the British Council who offer a wide variety of English courses to meet tailored demands. The UK has aligned its FCEP with the strategic issues of importance to the Egyptian government, primarily in education. Two important projects stand out: the Newton-Mosharafa Programme with £50 million pledged over a 7-year period, and the UK-UNICEF education reform programme, worth over £13 million. Lastly, the UK has continued to strengthen its dynamics and profile as a creative economy forerunner. £1 million GBP went towards capacity building schemes in the creative economy sector in Egypt.

EGYPT IS A PRIORITY COUNTRY

Figure 3. The UK Investment in Egypt

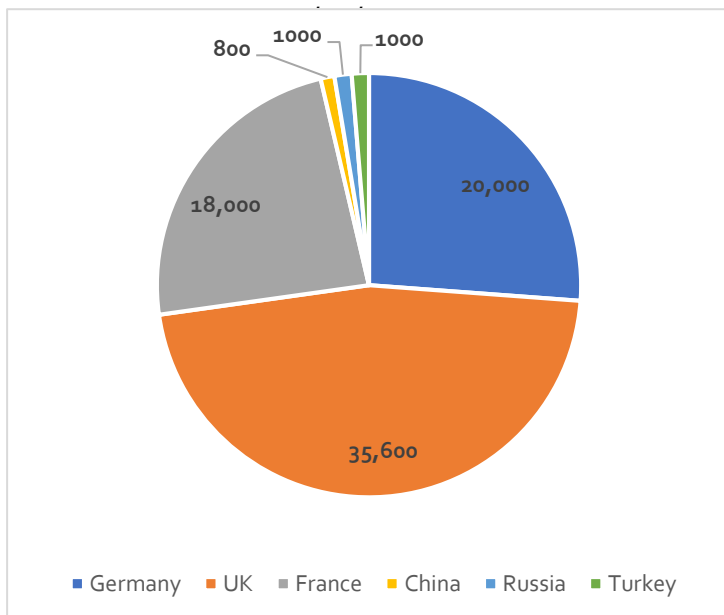


The many actors include the British Council (BC), the British Schools Overseas, The British University (BUE) in Egypt, Chevening scholarships, and the BBC World Service. The British Council regards Egypt a priority country. This is clearly signified by its annual budget, as well as allocated grants (see Figure 3). The UK actively supports the creative economy in Egypt and is running many capacity building programmes. Additionally, Egypt receives grants for the conservation of cultural heritage.

INCREASED ENGAGEMENT IN EDUCATION

The UK has adapted its ECP to answer the strategic objectives identified by the government of Egypt, education in particular. These include: 1) primary education reform through the UNICEF program, 2) tertiary education through expansions of TNE and 3) Science and Research through the Newton-Mosharafa Programme. Another important aspect is the provision of examinations through the Council which is highly profitable (IGCSE, etc). The education-as-business formula works quite well: Egypt ranks as the fifth-largest host country worldwide for UK transnational education (TNE) with over 19,800 students. Thus, much of the UK’s involvement in the country is profit-oriented.

Figure 4. Proportion of language learners in cultural



ENGLISH AS THE MOST SPOKEN FOREIGN LANGUAGE

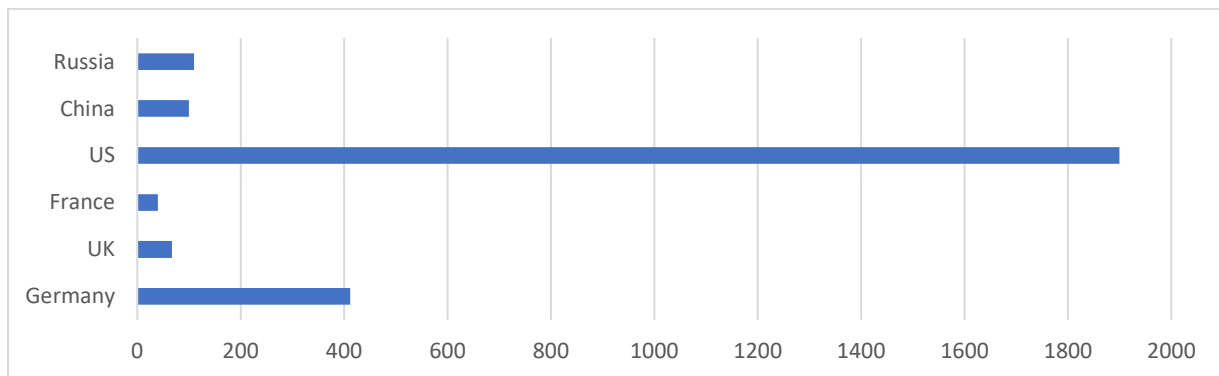
English proficiency is increasingly crucial for employability and the Council is actively promoting this link (Erling 2016). Half of all BC students are young learners. The institute gathers a high following (1.86 million) on social media (Facebook). The Council capitalises on this opportunity (60 per cent of the British Council's global income is acquired through courses and exams (GBR 2019)).

4 United States

ECP RECAP. The US engagement in Egypt is mainly conducted through provision of exchange opportunities. With regards to culture, this translates into globally designed programmes rolled out in Egypt with limited adaptation. The separation between the US's cultural policy and development cooperation is often blurred with the USAID playing a central role. In this regard, despite a limited public diplomacy budget of \$3,291,543 in 2016 and \$3,291,368 in 2017 in Egypt (U.S. Advisory Committee on Public Diplomacy 2018), the USAID provides high budget support in the field of education. The most important is the US Higher Education Initiative – currently the largest programme on tertiary education with an investment of \$250 million. Meanwhile, the US government's work in academia is conducted through the American Research Centre in Egypt (ARCE) and the US-Egypt Joint Science and Technology Fund. The two countries have agreed to strengthen scientific and technological cooperation under a joint fund. At the same time, the US' engagement in civil society is more controversial. Perceptions of US funding to civil society are often plagued with perceptions of foreign meddling and framed by generally unfavourable perceptions of past US policies towards the region. Since 2013 and the NGO case, the role of American think tanks in the country came under direct scrutiny which led to a trial and the eventual closure of the U.S.-based International Republican Institute (IRI), National Democratic Institute (NDI), and Freedom House. Since then, American think tanks report on Egypt from the US with limited presence in Egypt. The US media presence is visible through the Alhurra channel which is branded to directly appeal to Middle Eastern audiences using Arabic branding and local journalists. The channel was recently revamped and rebranded for more effective messaging.

STRONG EMPHASIS ON HIGHER EDUCATION AND SCIENTIFIC COOPERATION

Figure 5. Scholarships for Higher Education



The main focus of US engagement are programmes supporting higher education and scientific cooperation. The US-Egypt Higher Education Initiative is the largest programme (\$250 million) on tertiary education implemented by any partner or competitor country in Egypt. In terms of student mobility, the US surpasses other countries by offering the highest number of scholarships to Egyptians, reaching 1,900 students annually (see Figure 5). The American University in Cairo (AUC) remains one of the most important universities in Egypt.

NEGATIVE ATTITUDES TOWARDS US POLICY

Based on Gallup polls, more than half of respondents (62%) continues to disapprove of US leadership (Pew Research Centre 2013; Younis 2016). The image of the US is political in nature. However, the

anti-American sentiment does not extend onto the US in general as it remains a popular study destination for Egyptians. A major change is the withdrawal of American think-tanks from Egypt after the enforcement of the NGO law. The anti-US attitudes are likely to affect the US' future approach to supporting civil society in Egypt.

MEDIA TRANSFORMATION

The Middle East Broadcasting Network (MBN), an Arabic-language news organisation, has recently announced a major transformation to improve its programming (US Agency for Global Media 2018). In Egypt, the network is represented through Alhurra TV channel and RadioSawa. Alhurra is primarily news and information programming. The network hosts a number of discussion programmes that examine political and social issues of interest to the audience in the Middle East. Alhurra TV channel was the fourth most watched channel with 33% share of Egyptian audience (US Agency for Global Media 2018). Under the new transformation plan, the TV network should upgrade its programming and improve overall competitiveness.

5 Russian Federation

ECP RECAP. Old soviet ties are often at the center of cultural engagement between the two countries. Many of Egypt's cultural institutions, such as the music conservatory, the ballet institute, the institute of cinematography and the national dance company, were built with the support of soviet experts. Today, much of the cooperation is built around such historical ties. Unlike the Western countries, Russian culture strategy has been to engage with public associations, possibly helping them stay close to centres of power. Russia's engagement in Egypt is strategic, especially in science, technology, and media. By supporting strategic projects in science and technology (e.g. supporting Egypt's space agency and building nuclear facilities) which are important national objectives, Russia establishes itself as an important partner. However, the level of engagement and support to science and technology in the traditional sense is limited when compared to the West (exchange programs, joint research and etc.) Russian ECP is above anything else concentrated on the media. Partnerships with local media outlets, targeting of youth population, and strong social media presence resulted in Russian media's soaring popularity. RT is among the top 3 watched news channels in 6 Arabic countries.

INCREASED MEDIA PRESENCE

The most important element of Russia's cultural policy in Egypt is media. Through media, Russia is able to disseminate its ideas effectively and establish itself as the Western antidote, publishing the stories which Western media ignores. RT's popularity in the region is increasing quickly and some studies estimate that it is one of the most viewed channels gaining special traction through new media. At the same time, Sputnik and Egypt's Al-Ahram newspaper have entered into a partnership. Since then Russian news articles appear on the website more than any other contributor. Content on both sources discusses politics, but also report on positive developments in the Egypt, as well as a number of local stories. In this regard, Russian media sources try to show Western negative bias to

the region, playing on existing sentiment while generating traction to Al-Ahram's website. At the same time, it promotes Russia's ideas over the brand of its media agency.

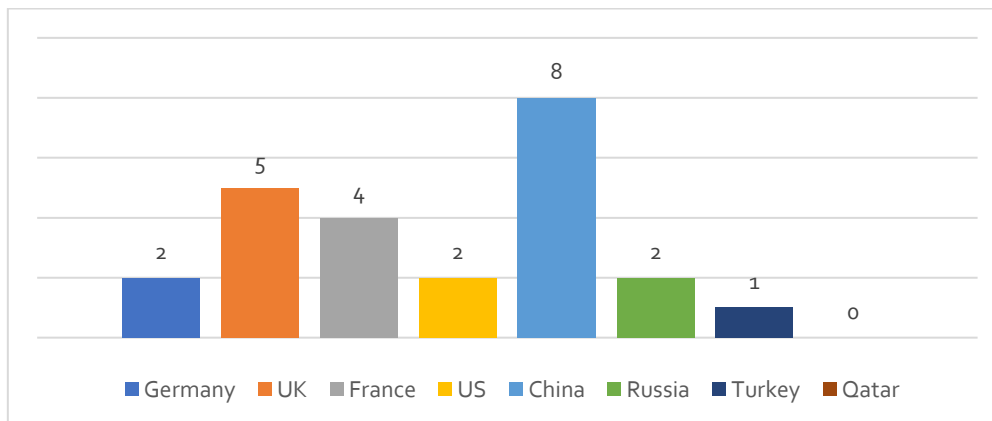
CULTURAL COOPERATION

The main actor is the Russian Centre for Science and Culture (RCSC) in Cairo which addresses the majority of the areas known to cultural cooperation and more. The Centre promotes Russian culture through arts exchange programmes, but also provides a breadth of competitively priced trainings on a breadth of topics, from Ballet to HR. One distinctive feature in implementing its activities with civil society or with the Centre partners and targets centres of power. In this regard, the Public Diplomacy Unit works with Associations of Artists and the Syndicate of Journalist enabling close proximity to public institutions and in line with soviet legacy. They also invest in maintain strong Alumni networks.

6 People's Republic of China

ECP RECAP. China has adopted an approach by which it distinguishes itself from that of the West. This is done by trying to engage in eye level cooperation and using suitable rhetoric, notably the narrative of "old civilisations". The expansion of Chinese cultural activities often closely traces its economic engagement and interest. The most important development has been the explosion of Confucius Institutes far beyond the urban centres using public universities as their forum for growth (such Pharos University in Alexandria province, Benha University in Qalyoubiya province and Fayoum University in Fayoum province (ChinaNews 2016)). The CEP activities are targeting the general public beyond the urban elites. Secondly, Chinese FCEP puts strong emphasis on cultural promotion to improve understanding of Chinese culture. The publicization of global events like the Chinese New Year and direct sponsorship of culture initiatives by the Chinese government confirm this. Moreover, additional channels like tourism and sponsored adaptations of Chinese television programmes work towards the same goal. The Chinese media engagement still remains limited. The CCTV has low viewership in Egypt. However, China has increasingly sought to partner with public media agencies. An example of this would be dubbing of Chinese shows but also through engaging the local media outlets in "the dialogue of civilisations".

Figure 6. Number of Cultural Offices in Egypt



CULTURAL PROMOTION TO IMPROVE UNDERSTANDING OF CHINESE CULTURE

In terms of presence of cultural institutes, China comes out at top with one Chinese Cultural Centre (CCC) and seven Confucius Institutes (CI) (see Figure 6). CIs, usually joint ventures with local institutions, can spread rapidly across the country, and more importantly far beyond the urban centres. To reach wider audiences, China collaborates with local public institutions. It has, for example, established two Chinese-Egyptian public schools and made them affordable to the general public. Mass culture events are the linchpin of the Chinese government's strategy to improve understanding and knowledge of Chinese culture: e.g. the promotion of global events like the Confucius Day or Chinese New Year, and many other events (102 activities in 2016). Moreover, the focus is on tourism to advance cultural exchange with Egypt (increase in the number of Chinese tourists from 160,000 in 2016 to over 300,000 in 2017). Other initiatives include sponsored adaptations of Chinese mass entertainment like TV shows.

NARRATIVE OF CULTURAL PROXIMITY AND EQUAL PARTNERSHIP

China frames relations with Egypt using language which alludes to eye-level cooperation and appeals to cultural/historical commonalities through portraying their relationship as a partnership between the oldest civilisations (Braude 2014; Haddad-Fonda 2017a). For example, Chinese CGTN inaugurated the first TV forum on "Dialogue of Civilizations" in Beijing in 2018 between China, Egypt, Greece and India aiming to replace the rhetoric of "clash of civilizations" promoting communication and understanding instead (Jianfeng 2018). Soap operas featured on Egyptian televisions highlight common traditional values and investment in Egypt's economy stress support for Egypt's development plans and respect for national sovereignty.

7 Turkey

ECP RECAP. Turkey's involvement with Egypt was limited until the AKP party adopted a new foreign policy of "strategic depth". Thereby, Turkey has recognized the Middle East as essential to expanding its influence. The brief honeymoon phase was followed by an abrupt deterioration in bilateral relations in 2013. Consequently, the positive public perception of Turkey (84% in 2012) plummeted to only 38% in 2013, according to the Turkish research group TESEV. Since then, Turkey's presence has been greatly limited and centred around its support for the Muslim Brotherhood. Cultural cooperation has further diminished (e.g. the withdrawal of the cultural centre from Alexandria). The YEE is the main cultural actor but with limited capacities to expand its activities. The language institute is mainly providing Turkish language classes at full capacity.

ABRUPT DETERIORATION IN BILATERAL RELATIONS

With the arrival of the Justice and Development Party to power in 2002, Turkey adopted a new foreign policy. The neo-Ottomanist ideology behind it called for a refocus on the Arab and Muslim neighbourhood (Hasselbach 2016; Jabbour 2016). The brief Turko-Egyptian alliance ended before it even began. In 2013, with the ouster of former President Morsi, the diplomatic relations came to a

halt. While 86% of Egyptians had positive views of Turkey in 2011, only 38% were of the same opinion in 2013. Since then the Turkey's cultural engagement has been very limited and centred around the work of the YEE in Cairo. The Centre offers a full programme of cultural events and language classes but operates with limited capacities. The YEE in Alexandria closed down.

8 Qatar

ECP RECAP. Similar to Turkey, Qatar's cultural and educational policy towards Egypt is minimal. Media remains the main instrument of Qatar's soft power. For example, AJA is one of the most watched news channels in the region (46% of the weekly audience in Egypt in 2017, (Deutsche Welle 2017)). Al Jazeera is considered the most viewed international broadcaster on TV and social media, but inconsistent data fails to prove that. The Qatari media's credibility has suffered greatly. Also, it remains unclear whether Al Jazeera is only popular because of its extensive and localized coverage of the region. Qatar actively supports the Muslim Brotherhood, by for example offering asylum for Egyptian exiles. The bilateral relations ended in deadlock since Egyptian authorities are effectively boycotting Qatar.

QATAR'S CULTURAL AND EDUCATIONAL POLICY TOWARDS EGYPT IS MINIMAL

Apart from the presence of Qatari state-funded outlet Al Jazeera, Qatar's involvement in Egypt is limited. Qatar offers active support for the Muslim Brotherhood by granting asylums to Egyptian migrants (World Bank data: 166,840 Egyptian migrants in 2018). Al Jazeera Arabic (AJA), Al Jazeera Mubasher Misr (AJMM) are now perceived as a platform for the Muslim Brotherhood (e.g. airing a number of documentaries critical of the Sisi government). AJA is one of the most watched news channels in the region (in 2017 capturing 46 % of the weekly audience in Egypt), but its credibility has greatly suffered.

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The case of Kenya

List of Tables and Figures

Tables

Comparison Table 1	66
Table 1. DAAD individual funding for Kenyans to Germany (Data from DAAD Annual Reports)	67
Table 2. Comparing Kenyan undergraduates and graduate students in Germany (DAAD), the U.S. and the UK.....	70
Table 3. U.S. Spending on education.....	72
Table 4. Comparing German, French, and Chinese language education.....	74

Figures

Figure 1. French Embassy budget allocations.....	68
Figure 2. Number of weekly users for DW Kiswahili language and BBC News	70
Figure 3. U.S. spending on public diplomacy in Kenya from 2014 – 2017	71
Figure 4. Approximate budget by cultural institution	71
Figure 5. Kenyan students studying abroad	72
Figure 6. Number of Kenyan students in Russia and China.....	73
Figure 7. Comparing media staff in Kenya.....	75
Figure 8. Number of Kenyan students studying abroad	76
Box 1. French in Kenya	69

Kenya

Kenya has experienced many changes in the last two decades. As a result, its partnerships have evolved. A fragile political framework—heavily influenced by ethnic differences—produced a policy vacuum in many social areas, including culture and education. The two policy areas suffered due to neglect, corruption and structural issues. Despite the challenges, the government has been attempting to remedy these problems in the last ten years with Vision 2030. The vision, implemented in 2008, is designed to streamline the government’s work to transform Kenya (GoK, 2008).

Foreign actors in Kenya have adjusted their policies in response to these ambitious internal strategies and the shifting global political climate. Germany and France’s policies in the last few years have been shaped by Africa-specific strategic plans. Germany and Kenya are strengthening relationships in education and training and science and academia. France is leveraging its strong cultural and linguistic presence in Kenya to deepen its ties in other key areas. The UK, active in Kenya due to colonial ties, is driven by Brexit as it looks to strengthen its relationships with non-EU partners. Russia, previously engaged and influential as the USSR during the cold war, is reasserting itself after almost three decades to counter Western and Chinese influence on the African continent. China’s presence has been most impressive. It opened its first Confucius Institute in Nairobi in 2005. In just 15 years, there are now a total of four Confucius Institutes, thousands of Kenyans have learned and speak Chinese, and China is active in almost all areas i.e. media, education, science and academia, culture, and language. Finally, Turkey and Qatar have a marginal presence in Kenya.

Comparison Table 1.

Country	Central Features	Challenges	"Take away" for Germany
Germany	Long and established partnership with Kenya; Positively viewed due to popular German brands and Germany's economic strength; Reliable partner; Strong TVET and educational support; Careful about maintaining fragile spaces and dialogue	Stereotypical perceptions of Germany still prevalent; Connection with population is lacking due to limited presence/influence; Perceived to be aloof	Many competing foreign interests with strong presence eclipsing Germany: Needs to redefine brand and purpose in Kenya
France	Strong cultural and linguistic presence and large financial investments in both; Increasing presence of French interests in Kenya; Focused on countering Chinese influence	Ability to pivot influence from culture and language to other areas; Capacity to compete with Chinese influence	Strong and streamlined branding strategy; Diversity in cultural programming and ability to engage different demographic groups; Invests in training local language teachers; Close cooperation with education partners to promote the French language
United Kingdom	English as <i>lingua franca</i> ; Past colonial history influences relationship; Reengaging due to Brexit; Strong media presence through the BBC; Youth-focused approach; Invested in supporting the creative economy	Managing negative perceptions associated with colonization; Changing course of relationship after years of detachment; Discriminatory visa policies against Africans undermines cultural and educational programming	Youth-focused branding is prominent and well-articulated
United States	Wide recognition of American cultural symbols and icons; U.S. still highly favoured as destination for studies and other opportunities; Reduced funding in all areas; Not as active in traditional cultural and educational policy but recognized for leadership and entrepreneurship	Diminished reputation of the U.S. under President Trump; Expensive and inaccessible	Invests in developing and maintaining interpersonal relationships; Influential and has wide reach; Implements programs with mass appeal
Russia	Marginal presence but rebuilding reputation; Determined to offset Western and Chinese influence; Has strong and obvious business interests; Unlikely to gain influence through ECP; Developing a militaristic reputation in Africa	Lack of interest in Russian language and culture; Stiff competition that will require larger investments	Consistent engagement for Germany is key; aversion towards colonial tendencies in local population
China	Active in almost all areas of ECP; Quickly adapts to local conditions; Strong cultural, media, and linguistic presence; Receptive population; Apolitical; Focuses on business; Impact is highly visible but Chinese poorly integrated in Kenyan society; Engagement characterized by high-level state-to-state relations	Needs to defend against neo-colonialist reputation; Maintains positive relations amidst charges of racism and discrimination; Accused of a lack of transparency in state-to-state dealings	Diversity in areas of engagement with local population; Mass appeal of cultural and linguistic programs; Able to scale concepts within short timeframes; High penetration and large number of points of contact with Kenyans
Turkey	Marginal engagement in Kenya; No organized ECP programming	No strategic focus on Kenya	-
Qatar	Marginal engagement in Kenya; Signed MOUs but no visible follow-through	No close ties even with local Muslim population	-

1 Germany

ECP RECAP: Though not the most active, Germany is still very engaged in several different areas of ECP. **Culture, the Arts, and Language:** The Goethe Institut Kenia is the main German culture and language institution in Kenya. It offers different levels of language courses and language certification exams. Culturally, it connects artists and provides a platform for intellectual engagement on targeted issues varying from gender and LGBTQI dialogue to postcolonialism (ca. 60 cultural activities annually). The German Mission simultaneously engages in cultural and arts activities in Kenya, though at a smaller scale. In the last few years, the cultural department at the mission has renovated key heritage sites as well. **Education and Training:** The DAAD's regional office in Nairobi sponsors hundreds of Kenyan students each year (see Table 1). Germany, through the DAAD, has signed an agreement with the Kenyan government to establish a University of Applied Sciences that specializes in science, engineering, entrepreneurship, and TVET teacher training. Two Centres of Excellence in Kenya (one in education and one in mining and engineering) have benefitted from the DAAD's assistance as well (KGCEN, 2019). Both the German public and private sectors are collaborating with the Kenyan government to strengthen TVET education in Kenya. There is 1 German School Abroad and 2 PASCH network schools. **Science & Academia:** Kenyan researchers can apply to the DAAD or the Alexander von Humboldt Foundation to get their research funded. Additionally, Germany indirectly supports a number of research institutions that operate in Kenya. Moreover, a number of universities and research institutions have independently developed exchange research partnerships. **Media:** Both DW and DW Akademie are active in Kenya. The Akademie holds trainings and workshops for TV, radio, and print journalists. DW Akademie supports independent media in rural Kenya through training "to combat hate speech, and promote accurate and independent reporting." DW broadcasts in English and Kiswahili. The Kiswahili language service "is among the top 5 performing languages in the DW portfolio," (personal communication, August 7, 2019).

Table 1. DAAD individual funding for Kenyans to Germany (Data from DAAD Annual Reports)

Annual Report	2017	2016	2015	2014	2013	2012
Bachelor	18	18	22	19	20	21
Master	170	127	295	267	252	243
PhD	244	237	184	164	151	119
Academics/Lecturers	8	5	1	3	8	6
TOTAL	440	387	502	453	431	389

Note: Data is from the 2012 – 2017 Annual Reports.

2 France

ECP RECAP: President Macron's visit to Kenya in 2019, the first by a French PM, left a big impression on the country. Out of that visit, eight agreements were signed: many in the areas of education, science, and academia **Culture, the Arts & Language:** Compared to other partners, France has the most active cultural institutions in Kenya. Alliance Française is very popular due to the variety of programs it offers. French is the most taught and learned foreign language in the country (personal communication, August 16, 2019; see Box 1). Alliance Française shares Francophonie programs at large to help facilitate cultural exchanges and bridge the connection between Kenyan French speakers and the greater Francophonie world. The French Embassy's cultural department works closely with Alliance Française but concurrently runs its own programs. **Education and Training:** Despite the large number of French learners, only around 150 students went to France for their studies this year (Ministry for Foreign and European Affairs, 2019). France is looking to change this by leveraging its cultural and linguistic influence in the country. Similar to Germany, France is invested in improving TVET education in Kenya. **Science & Academia:** There are three French research institutions in Kenya. All have partnerships with Kenyan institutions and universities and promote collaborative work between French and Kenyan researchers. There is also the Partenaire Hubert Curien PAMOJA partnership that funds select research projects. Kenya and France have adopted a "Roadmap on University, Innovation, Research, and Professional Training Partnerships" aimed to increase scientific cooperation. **Media:** France supports different media in Kenya. The Embassy works closely with many media stakeholders and various government institutions. Last year, France 24 launched an English version of the French international news channel in Kenya. French radio *rfi* (in French) is also accessible in certain parts of Kenya.

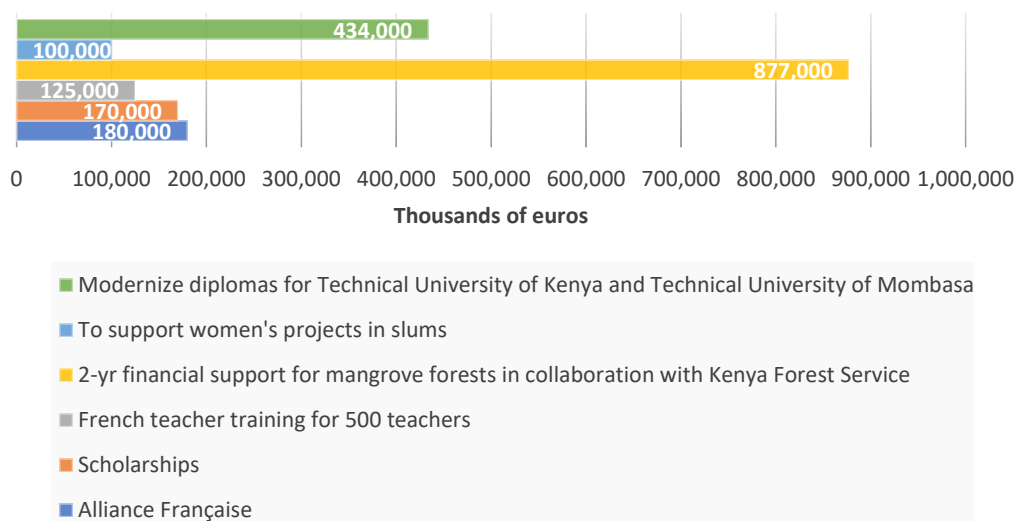


Figure 1. French Embassy budget allocations.

Note: These numbers of the different budget allocations in the last few years were provided by the French Embassy in Nairobi. This is not exhaustive of all of the embassy's activities but what was given is provided here for reference.

FRANCE INVESTS A CONSIDERABLE AMOUNT OF FUNDS IN LANGUAGE TRAINING

Not only does Alliance Française have a million euro budget, there are an additional 22 French language resource centers around the country and the French Embassy works closely with local education partners to strengthen teaching capacity and promote the French language (personal communication, August 16, 2019).

HIGH NUMBER OF LANGUAGE STUDENTS IN THE COUNTRY BUT NO UPTREND IN NUMBER OF OUTGOING KENYAN STUDENTS

Despite a high number of language learners, this year only 150 students went to France to study (Ministry of Foreign and European Affairs, 2019). In the last few years, France has more aggressively marketed itself as a destination for students and researchers. It has for example launched a “Welcome to France” platform in July of 2019 to help students familiarize themselves with France and its opportunities. Though most of its activities are in Nairobi, France’s strategy has been to forge partnerships with institutions all over the country. With this new dedication to promoting higher education, there should be an increase in exchange students to France.

Box 1. French in Kenya

FRENCH IN KENYA, A SNAPSHOT

48000 Learners **1756** Language Certificates **400** French language

teachers

Box 1: Data on the number of learners and language teachers is from the Ministère de l'Europe et des Affaires Etrangères Kenya webpage, and the number of issued language certificates in 2018 is from the French Embassy.

3 United Kingdom

ECP RECAP: Culture, the Arts & Language: Since Kenya is an Anglophone country, the British Council and British High Commission’s programs are limited to culture and the arts. The Council does not offer language courses on-site.⁸ A connecting theme across the British Council’s programming is the heavy emphasis on mobility and connections. The British Council’s strategic focus is in empowering arts and culture practitioners in the creative economy and in nurturing and enabling UK/East African culture and arts connections and partnerships. **Education and Training:** The UK’s education policy in Kenya is targeted towards vulnerable communities, offering alternative funding for needy students, and providing pedagogical and digital education resources to help support the struggling higher education sector in Kenya. UKAid (DFID) implements most of the UK’s programs in Kenya. Many students study in the UK by progressing through IGSC/IB programs or by passing the IELTS English language test. Kenyans interested in studying in the UK take the required language exams at the British Council. **Science & Academia:** The UK’s main bilateral

⁸ The British Council promotes digital language courses and resources through its official Kenya website (<https://www.britishcouncil.co.ke/>).

agreement with Kenya on ST&I is the Newton-Utafiti Fund. There is one British research institution in Kenya, the British Institute in Eastern Africa, which specializes in humanities and social sciences. The UK is also funding research on affordable housing in Kenya, aligning its support with President Kenyatta’s goal of building affordable housing. **Media:** Kenya is home to the largest BBC bureau outside of the UK. The number of Kenyans listening to BBC News has jumped significantly in the last year (BBC, 2019). BBC Africa has also gained recognition for its locally centered content. BBC Radio is available in both Kiswahili and English as well in Nairobi, Kisumu and Mombasa.

MANY KENYAN STUDENTS STILL OPT TO PURSUE THEIR STUDIES IN THE UK

The UK is still a favoured study destination (see Table 2). However, recently the UK has come under fire for discriminating against Africans and rejecting more African than other foreign visa applicants.

Table 2. Comparing Kenyan undergraduates and graduate students in Germany (DAAD), the U.S. and the UK

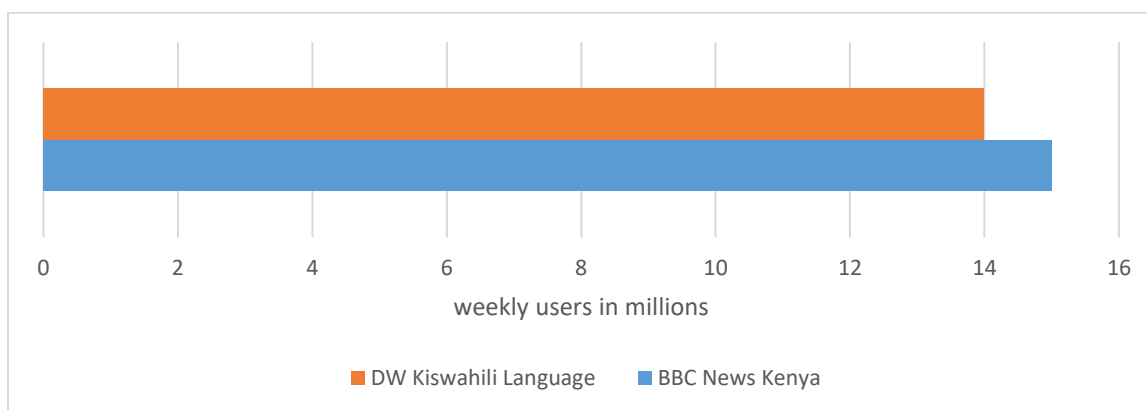
	Germany 2016/2017	U.S. 2016/2017	UK 2017/2018
Undergraduate	41	1805	1405
Graduate	418	869	785

Note: This Germany data is from the 2017 DAAD Annual Report (2018), the data on the U.S. is from the Institute of International Education (2019) and the UK data is from the Higher Education Statistics Agency (2019).

BBC’S MOVE TO OPEN UP ITS AFRICA BUREAU IN NAIROBI PAID OFF

Kenya is one of the countries where the BBC has seen the most amount of growth in viewers/listeners in the world. The latest number reported for BBC News is 15 million (see Figure 2).

Figure 2. Number of weekly users for DW Kiswahili language and BBC News



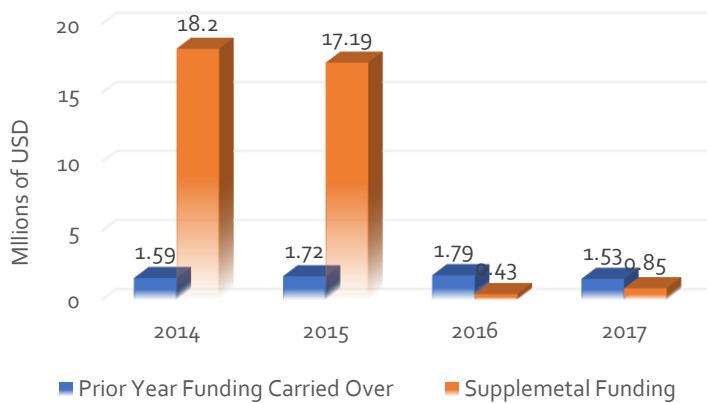
Note: DW data is from an informational document shared by DW via email. BBC data is from the BBC Media Centre (2019).

4 United States

ECP RECAP: There are total of five American Centres and Spaces in Kenya that function mostly as Q&A resource centres. The U.S. does not provide language resources. There is no indication that the US directly supports ST&I in Kenya. Non-traditional education initiatives like the Young African Leadership Initiative (YALI) are popular among young Kenyans. In terms of media engagement, Voice of America airs in Kenya in both Kiswahili and English. The US also supports free media in Kenya.

Figure 3. U.S. spending on public diplomacy in Kenya from 2014 – 2017

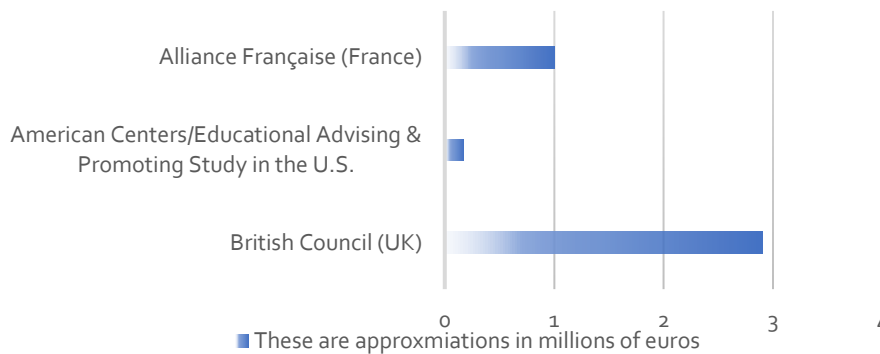
DECREASED PUBLIC DIPLOMACY FUNDING OVER THE YEARS



The decreased public diplomacy spending (see Figure 3) reflects lower level of engagement. For example, compared to other countries, the U.S. does not allocate a lot of its funding for its American Spaces in Kenya (see Figure 4).






Note: Data is from the latest U.S. Advisory Commission on Public Diplomacy comprehensive annual report.

Figure 4. Approximate budget by cultural institution



Note: Budget for Alliance Française is from the interview at the French Embassy. Data on the British Council is from the UK online development tracker. And data on the U.S. is from the latest U.S. Advisory Commission

Table 3. U.S. Spending on education

Year	Amount	Changes
2020	Total: \$5.5 M	
	Higher Education: \$1.5 M (27%) ⁹	
	Basic Education: \$4 M (73%)	
2019	Total: \$9.5 M	
	Higher Education: \$4 M (42%)	
	Basic Education: \$5.5 M (58%)	
2018	Total: \$13 M	
	Higher Education: \$5 M (38%)	
	Basic Education: \$8 M (62%)	
2017	Total: \$11.02 M	
	Higher Education: \$1.25 M (11%)	
	Basic Education: \$9.77 M (89%)	
2016	Total: \$11.02 M	
	Higher Education: \$1.25 M (11%)	
	Basic Education: \$9.77 M (89%)	

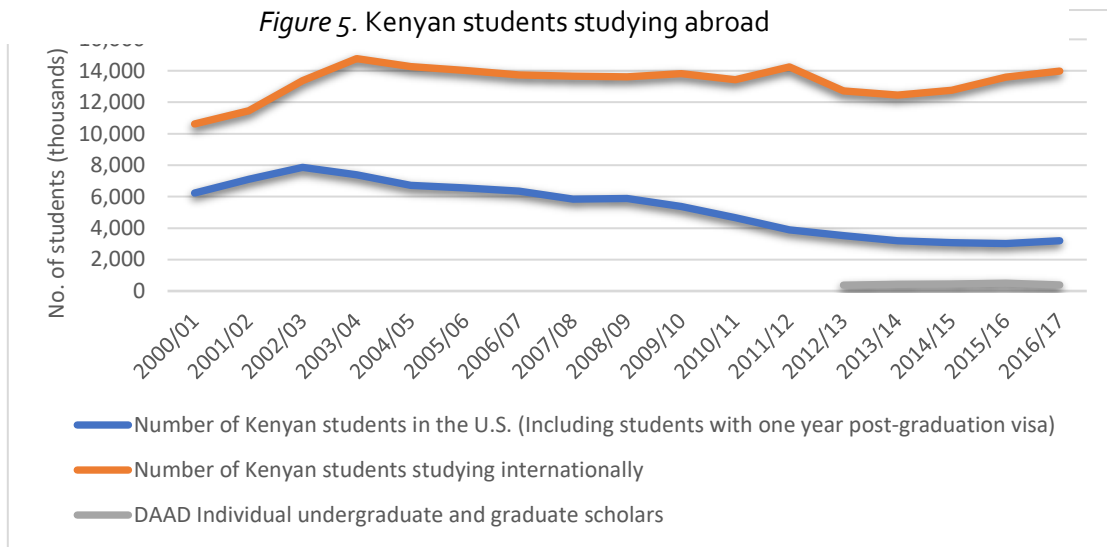
DECREASED SPENDING IN THE AREA OF EDUCATION

U.S. education assistance in Kenya has been halved for 2020 (see Table 3). Out of all the foreign assistance the US gives to Kenya, only a fraction is for education (has been 2% of total and is down to 1%).¹⁰

LOWER NUMBER OF KENYAN STUDENTS GOING TO THE U.S.

Fewer and fewer Kenyan students are studying in the U.S. The number today is half of what it was in the 2000s (see Figure 5). This is due to restricted visas, high expenses, and the increase in the number of local/regional universities.

Note: Data from U.S. Dept. of State database



Note: Data on the total number of Kenyan students studying abroad over time is from UIS (2019), data on the number of Kenyan students studying in the U.S. is from the Institute of International Education (2019), and the DAAD data is from DAAD annual reports (2013, 2014, 2015, 2016, 2017a, 2018).

9 Based on published data (foreignassistance.gov) on foreign assistance by the U.S. government.

10 Each are a percentage of the total foreign assistance.

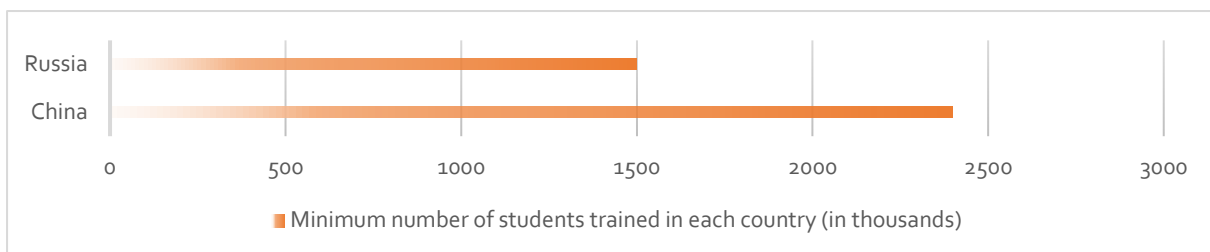
5 Russian Federation

ECP RECAP: The Soviet Union had close ties with Kenya. Many students studied there until its collapse in 1991 (Orieny, 2019). Kenyan students have continued to study in Russia (see Figure 6), albeit in lower numbers—some with the help of joint Russia-Kenya scholarships.¹¹ According to Russian state media, one in ten Kenyan doctors has studied in Russia/the former USSR (TASS, 2019). As Russia rekindles its relationship with African countries, after decades, it is determined to increase the number of opportunities for Kenyan students though the demand for Russian language and cultural studies in Kenya is very low.¹²

RUSSIA'S ECP ACTIVITIES IN KENYA ARE LIMITED

Relative to countries such as Angola, Russia's investments in Kenya thus far are scant. 1,120 Angolans were enrolled in Russian universities just this year compared to 37 Kenyan who were sent on fully-funded scholarships by the Russian Embassy in Kenya (Kariuki, 2019; Orieny, 2019). At the recent Russia-Africa summit in Sochi (which took place on October 23 – 24), Russia and Kenya signed some MOUs in cultural, scientific and technological cooperation. Additionally, Russia expressed its intent to provide media support.

Figure 6. Number of Kenyan students in Russia and China



Note: Approximate number of Kenyan students who have been educated in Russia and China (in the last few decades). Number for Russia is from the Embassy of the Russian Federation in the Republic of Kenya (2019), for China is from a China Daily article, "China-Kenya cultural exchanges" (2018).

6 People's Republic of China

ECP RECAP: Culture & Language: There are four Confucius Institutes in Kenya. In addition to language courses, Chinese language certificates, and diplomas, students studying at the institutes are immersed in Chinese culture through a variety of programs and activities. Many Kenyans are encouraged to learn Chinese to improve their prospects of finding employment. Kenya has added Mandarin to the list of foreign languages offered in the new education curriculum alongside Arabic, German, and French. **Education and Training:** China sponsored over 200 Kenyan students this year (Maema, 2019). With many Kenyans learning the Chinese language, it is likely that more Kenyans will choose to study in China. In addition, Chinese

¹¹ Governance challenges in Kenya have negatively impacted these exchanges in the past. Students endured funding delays and program cancellations. According to one article, the joint funding program was stopped in 2011. Whether it has resumed is unclear.

¹² It is unclear whether the Russky Mir Cabinet, which opened in Nairobi in 2011, is still open, but Russian is not taught at most, if not all, of the major universities.

companies are training many workers in Kenya, boosting local technical and vocational training (Quartz News, 2019). **Science & Academia:** China is playing a more active role in science and academia. Its most prominent research institution is the Sino-African Joint Research Centre (SAJOREC), which has its headquarters at the Jomo Kenyatta University of Agriculture and Technology (JKUAT). In addition, China has a Crop and Molecular Biology Lab attached to the Confucius Institute at Egerton University. **Media:** When Kenyan media houses had to switch from analogue to digital a few years ago, there was an immediate need for the appropriate infrastructure and technology to meet the transition deadline. Chinese company StarTimes, described as “one of Beijing’s most powerful soft power tools in Africa,” helped Kenya make the transition (Marsh, 2019). However, StarTimes is not just an operator; it has the responsibility of providing affordable/free satellite TV services to poor Kenyan households as part of President Xi’s 10,000 Villages Project. Other state-owned Chinese media companies are active in Kenya as well. Xinhua, China Daily, CGTN, and China Radio all have offices in Nairobi. China is using media to create a positive image of China abroad, hence the large media concentration in Kenya; however, Kenyan perceptions of Chinese interests in Kenya remain mixed and are not entirely positive.

CHINESE IS VERY POPULAR IN KENYA AND IS TIED TO EMPLOYABILITY

The popularity and demand for Chinese classes is remarkable given China’s strong presence is hardly two decades old (see Table 4). Kenyans have become increasingly enthusiastic about the Chinese language and culture. For many students, mastery of the Chinese language and cultural training factors into their employability and creates opportunities. The Chinese language will become more widespread once Kenya implements it into the education system in 2020.

Table 4. Comparing German, French, and Chinese language education

	German	French	Chinese
No. of estimated learners	>9000 5939 (according to the German Foreign Office in 2018)	40000 - 48000 ¹³	3000 + (counting only 1 of 4 Confucius Institutes) ¹⁴
No. of language certificates issued	1033 (in 2018) 312 (according to the German Foreign Office in 2018)	1756 (In 2018)	1526 (since 2008, at only 1 of 4 Confucius Institutes)
No. of language teachers	140	400-500	Unknown, uses volunteers in addition to regular teachers
Main cultural institutions	Goethe Institut (2500 students, 25 teachers)	Alliance Française (3000-3500 students, 30 teachers)	4 Confucius Institutes
Other facilities	-	20 language teachers resource centres	1 Chinese Confucius Classroom at Rusinga Schools

¹³ Numbers are general estimates and may not include the number of students learning languages at primary school. For example, the number given for France only includes secondary and university learners as provided by the French government.

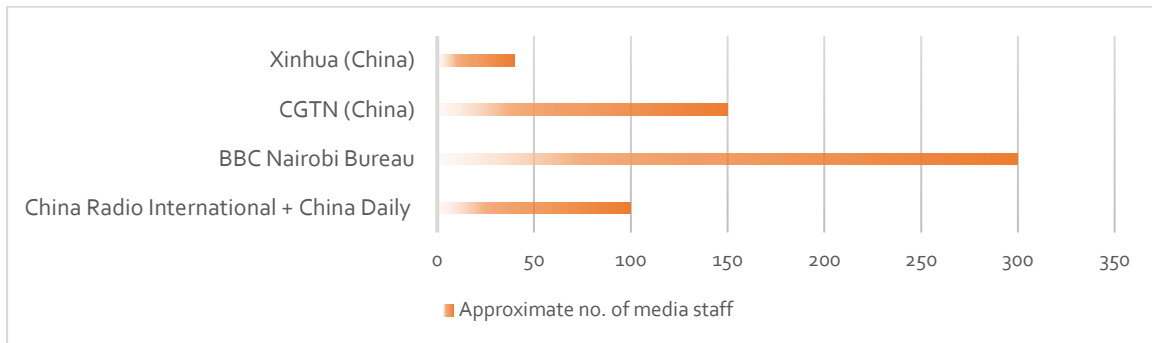
¹⁴ There are students studying Chinese at non-Confucius institutions as well e.g. primary schools, independent language schools etc.

Note: German data is from the German Mission and the Kenya page on the German Federal Foreign Service website. The French data is from the French Embassy in Kenya and the bilateral relations page on the French Ministry for Foreign and European Affairs website (Ministère de l'Europe et des Affaires Etrangères, 2019).

CHINESE MEDIA PENETRATION IN KENYA IS HIGH

Figure 7. Comparing media staff in Kenya.

Note: Data used is from a Quartz article (Sui, 2019)



Major Chinese media houses have already established or are in the process of establishing a base in Nairobi (see Figure 7). The emphasis is also on localization (e.g. many scouted journalists are Kenyan). StarTimes invests in local content, making it more popular among Kenyans, and tunes its services to suit Kenyan tastes (Marsh, 2019). Moreover, modern platforms and new media are increasingly important. According to Sui (2019), “novel news platforms developed by Chinese companies are having more success in penetrating African societies” than traditional media.

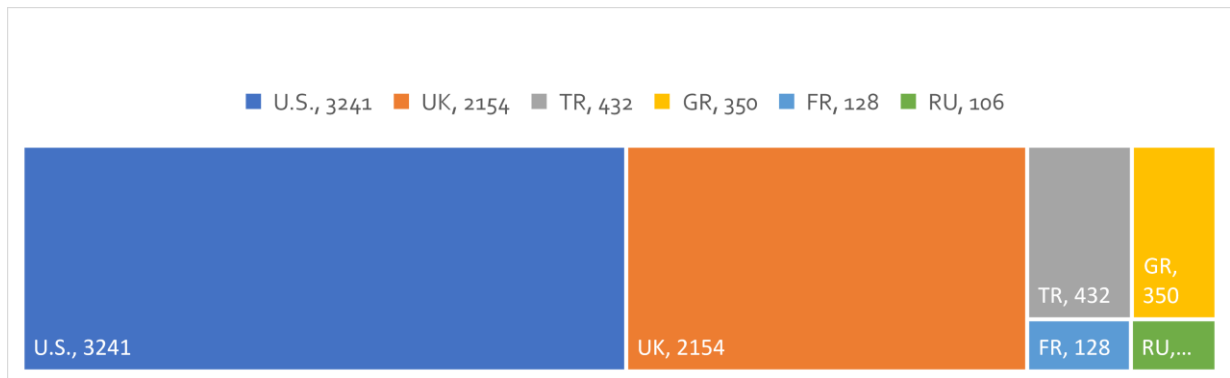
7 Turkey

TURKEY’S MARGINAL ECP ENGAGEMENT

Although Turkey and Kenya enjoy a good relationship, Turkish cultural and educational engagement is limited relative to the other partners. The Turkish government awards scholarships annually to a few Kenyan students to study in Turkey. According to the Turkish Ministry of Foreign Affairs, 41 Kenyan students received scholarships to study in Turkey in 2018 (Republic of Turkey Ministry of Foreign Affairs, 2018). In addition to this, TIKA has implemented small-scale education projects, for example, providing school equipment and launching an Islamic Studies curriculum in 50 religious schools to counter extremist teachings. Despite the limited engagement, hundreds of Turkish students study in Turkey every year (see Figure 8).

Figure 8. Number of Kenyan students studying abroad¹⁵

Note: Data is from the UNESCO Institute for Statistics (2019)



8 Qatar

In the last three years, Qatar and Kenya have signed cultural and education agreements. However, research could not confirm whether these agreements have been implemented. Qatar's Al Jazeera network is quite popular in Kenya and it has a few journalists based in Kenya. The network had previously planned to open an Al-Jazeera Swahili bureau in 2012, but seems to have abandoned that idea. Both Al-Jazeera and its social media only platform, AJ+, produce content touching on local issues, which has gained a lot of attention locally.

¹⁵ 1063 Kenyans studying in Germany in 2018 according to the German Foreign Office.

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The case of Serbia

List of Tables and Figures

Tables

Comparison Table 1.	81
Table 1. Participants of US programmes in Serbia.....	88
Table 2. The Activities of CI Belgrade.....	91

Figures

Figure 1. Institut Français stands out as the most active institute.....	83
Figure 2. IF secures the largest share of language learners at cultural institutes.....	84
Figure 3. 21 st Schools project.....	86
Figure 4. US public diplomacy expenditure in Serbia.....	87
Figure 5. US' ECP expenditure in Serbia by activity	88
Figure 6. Sputnik Serbia website	90
Figure 7. Influx of Chinese tourists.....	91
Figure 8. Development of TIKa's activities in Serbia	93
Figure 9. TIKa's activities by field.....	93
Box 1. German Language Education at GI Serbia	82

Serbia

Serbia is undergoing many structural and democratic changes at the moment. Since 2012 when the country was granted a candidate status, EU membership has been the foremost priority. However, the present is not very bright. The authoritarian drift of the country's government and the growing disenchantment with the EU open spaces for other external actors like China, Russia, Turkey, and the Gulf States to expand their influence. In such circumstances the external cultural and educational policy (ECP) often plays a crucial role.

Owing to its geopolitical position and rich historical and cultural background, many actors are present in Serbia. The involvement of Western countries (Germany, France, the UK, the US) is associated with the prospect of EU integration. At the same time, and due to a number of factors, a part of population has become somewhat anti-Western. Actors like Russia and China have utilised such local specificities to their advantage. China has persistently emphasised its neutral position, especially focusing on the vocabulary of partnership and friendship. Based on its considerable economic clout in the country, China has intensified activities at all levels. Russia has capitalised on the local anti-Westernism by presenting itself as an alternative model and defender of traditional values and Eastern Orthodoxy. Turkey has engaged in its own religious diplomacy by presenting itself as the protector of Muslim kinfolk in the former Ottoman space (Sandžak region). In their ECP involvement in the country, many actors had to show flexibility in operating across diversified local conditions.

Comparison Table 1.

Country	Signature	Challenges	Opportunities	Takeaway
France	<ul style="list-style-type: none"> - Arts - Local community development - Work with youth - Human development goals 	<ul style="list-style-type: none"> - Anti-Western sentiment - Historical antagonism 	<ul style="list-style-type: none"> - 'Special attachment' between two countries - Francophilia 	<ul style="list-style-type: none"> - Close cooperation between all French representatives (IF, AFD, AUF, French Embassy, etc) - Local impact
UK	<ul style="list-style-type: none"> - New technologies in education - Creative industries - Capacity building programmes - Brand organisations (BBC, British Council) - Western-Balkans approach 	<ul style="list-style-type: none"> - Limited budget and descaled activities - Regional approach (frail inter-ethnic relationships, culturally complex region) - anti-Westernism 	<ul style="list-style-type: none"> - English as <i>lingua franca</i> - UK as a role model in creative economy 	<ul style="list-style-type: none"> - Engagement with local and regional culture eco-systems - A win-win approach based on capacity building schemes that at the same time promote UK-based know-how
USA	<ul style="list-style-type: none"> - Assistance-style projects - Strengthening the local community and CSOs 	<ul style="list-style-type: none"> - No bilateral cultural cooperation - Limited budgets - Strong anti-US attitude with parts of population 	<ul style="list-style-type: none"> - Foster the traditional alliance between two countries - American culture very popular - People-to-people exchange 	<ul style="list-style-type: none"> - Devise a country-specific strategy - Focus on civic education
Russia	<ul style="list-style-type: none"> - Focus on traditional values - Russian grand culture - Alternative to the Western model - Religious diplomacy 	<ul style="list-style-type: none"> - the West remains the prime reference point 	<ul style="list-style-type: none"> - Similarities (Slavic languages, Cyrillic script, Orthodox religion) - High popularity in the public sphere 	<ul style="list-style-type: none"> - Strategic approach and cost-effective planning - Cross-linked, fluid network of many organisations and actors
China	<ul style="list-style-type: none"> - Rapid expansion - Considerable economic clout - Multi-functional and regional approach - Fostering friendships and bilateral exchange 	<ul style="list-style-type: none"> - China seen as a 'distant' country - Economy more important than culture 	<ul style="list-style-type: none"> - China as a 'newcomer' - Appeal of Chinese largesse 	<ul style="list-style-type: none"> - Joint ventures with local institutions - Multi-layered approach (BRI)
Turkey	<ul style="list-style-type: none"> - Regional, WB-approach - Neo-Ottomanism - Development projects through TIKA (restoration of Ottoman sites, education, healthcare) - Religious authority (Diyamet) 	<ul style="list-style-type: none"> - Only a part of population (region Sandžak) responds to Turkey's religious diplomacy 	<ul style="list-style-type: none"> - Muslim-populated regions in the Balkans - Economic appeal - Shared cultural and historical characteristics 	<ul style="list-style-type: none"> - Flexibility to country-specific circumstances - Bottom-up approach (e.g. TIKA's assistance)
Qatar	<ul style="list-style-type: none"> - Interested in European giants in culture (France, Italy, etc), not so much Serbia - Bring local expertise to Qatar (e.g. sports medicine experts and coaches from Serbia) 	<ul style="list-style-type: none"> - Cooperation with the Gulf Countries still a novelty - Difficulties in establishing cultural exchange 	<ul style="list-style-type: none"> - Appeal of new investments coming from the Gulf 	<ul style="list-style-type: none"> - Importance of business and private sector

1 Germany

ECP RECAP: Germany is Serbia's key partner. The two countries are linked together by shared histories and people-to-people connections. Cultural exchange between Serbia and Germany is one of the strongest pillars of bilateral relations. A number of German institutions are directly or indirectly present: Goethe Institut (GI), DAAD, ZfA, ifa, Deutsche Welle, as well as all six political foundations. Goethe Institut is the main cultural actor focusing on language education and cultural activities. As a foreign language, German is the second most popular language after English. There is a steady increasing demand for German both at GI and the public school system. The primary reasons for this demand are studying and migration to work or reunite with family in a German-speaking country. Because of its limited capacities, GI cannot respond to the increased demand. ZfA oversees the introduction of German as the first foreign language at secondary schools. Currently 5 schools offer DSD II level diploma. The German School in Belgrade is also part of this PASCH network. In addition to this, there are 27 Länderprojekt schools offering DSD I exams. Apart from the PASCH school network, the German development agency, GIZ, has implemented two important programmes in education. Germany is closely involved in the reform of vocational education in Serbia. Higher education is very well-developed with 59 university partnerships. Germany is a very popular study destination, especially since Serbian students have direct access after obtaining their *Matura*. Apart from individuals, the German Academic Exchange Service – DAAD offers project funding. The Alexander von Humboldt programme is available to Serbian students. Serbian and German institutions further cooperate through EU mechanisms like Erasmus+ and Horizon2020. German media is directly present through Deutsche Welle Serbian digital service, but Serbia is not a priority country in DW's broadcasting (DE011)¹⁶. Additionally, the DW Akademie implements capacity-building projects for media associations and youth NGOs.

A VERY HIGH DEMAND IN GERMAN LANGUAGE EDUCATION

Language education is the strongest asset of Germany's cultural diplomacy towards Serbia. Research suggests that there is an immense potential to grow in this field. Goethe Institut could easily expand its language operation, but its capacities are limited (see Box 1 and Figure 2).

Box 1. German Language Education at GI Serbia

GERMAN IN SERBIA: A SNAPSHOT

2,500-3,000 language learners annually

139,067 total language learners in the country

3490 Language Certificates (2018), **5,085** language certificates in total according to the German Foreign Office in 2018 (December 2019 update).

Box 1: Data on the number of learners and issued language certificates is based on locally-sourced GI data. The 2019 update possibly includes the PASCH school certificates. The number of total learners was sourced from the Foreign Office.

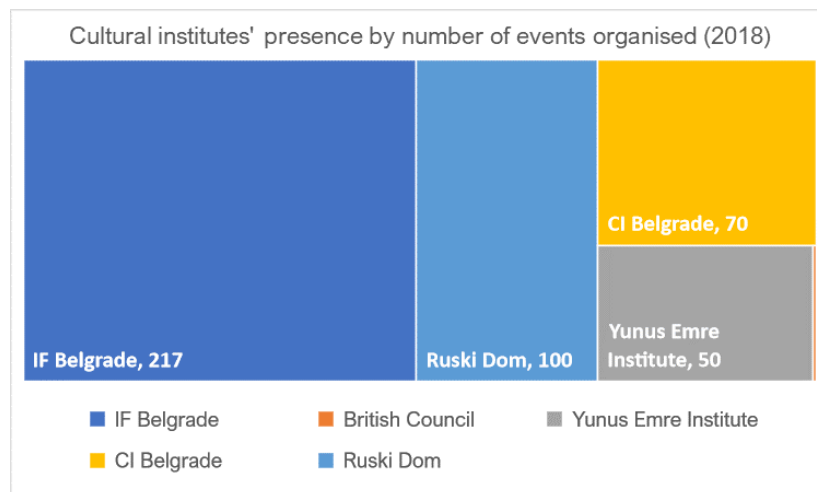
¹⁶ For the complete interview coding list, please refer to the Annex II of the longer Serbia report.

2 France

ECP RECAP. French cultural diplomacy towards Serbia is based on the narrative of ‘traditional friendship’ between two countries, dating back to their alliance from the World War I. President Macron made a visit to Serbia in 2019, during which 22 inter-state agreements were signed. Many francophone organisations are active in Serbia: the French Embassy, the Francophone University agency (AUF), Institut Français (IF) with 3 local offices. Since 1973, Paris hosts the Cultural Centre of Serbia. Culture and the arts are probably the most important aspect of ECP (RS002). Since the Paris Climate Agreement (2016), French diplomacy has expanded its mandate. Institut Français in Serbia is increasingly involved in societal issues. The activities are more integrated with the goals of gender equality, climate change awareness, and human development. The emphasis is on activism and leaving an impact on smaller communities. France is also active within regional initiatives like RYCO. French is the third foreign language by number of students in Serbia. The French language education takes shape in institutional cooperation (8 bilingual schools) and the language school model (IF). The French School Belgrade, recognised by AEFÉ, offers pre-university education. Moreover, since 2013, together with the Ministry of Youth, Institut Français supports the promotion of talents through the Dositeja scholarship. In terms of student mobility, France is in the top 5 countries to study abroad for Serbians (FR002). There are 2 joint MA degrees between Serbian and French tertiary institutions. The scientific cooperation is further facilitated through EU programmes like Erasmus+ and Horizon2020. Of special significance is the bilateral science programme “PHC Pavle Savić”. The French development agency (AFD) has started operating in Serbia. The only field where France is minimally engaged is the media. The RFI local branch was shut down in 2009.

IF HAS INCREASED THE SCOPE OF ITS ACTIVITIES WHICH ARE NOW INTEGRATED WITH THE DEVELOPMENT GOALS

Figure 1. Institut Français stands out as the most active institute

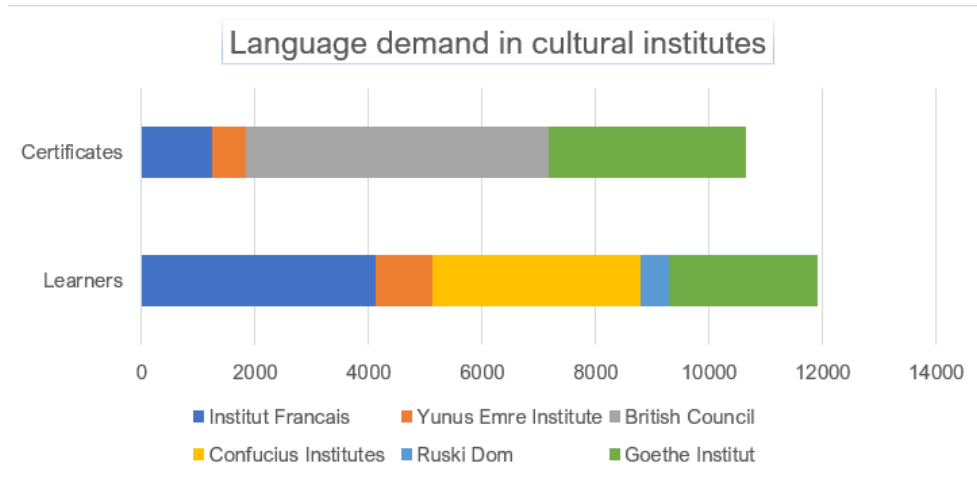


Institut Français operating on a budget of €1 million (FR002) and with an already established presence (see Figure 1), has increased its mandate in the last four years. The activities are now integrated with the goals of gender equality, climate change awareness, and societal development. Increasingly, the focus is on activism and smaller communities.

FRENCH REMAINS THE THIRD MOST POPULAR FOREIGN LANGUAGE

Around 110,000 students are learning French in Serbian schools. Through its 3 offices, IF gathers annually around 4,000 learners which also makes the largest share of enrolled language students in all institutes (see Figure 2).

Figure 2. IF secures the largest share of language learners at cultural institutes



3 United Kingdom

ECP RECAP: The UK exercises its foreign cultural policy towards Serbia mainly through the British Embassy, the British Council, and the reactivated BBC Serbian desk. The UK is eager to demonstrate its continued commitment to the Western Balkans region, even after Brexit (e.g. assistance through the Good Governance Programme to reach £80 million by 2020/21). However, because there are limited ties between the British and Serbian peoples, there is danger that the UK will withdraw and concentrate its efforts elsewhere. Therefore, the UK has opted for a long-term, cost-effective approach. British 'brand' organisations like BBC and the British Council have recently made their comeback in Serbia. Special focus is on capacity building programmes for individuals, institutions, and the Serbian government. While this helps strengthen the local capacities, it also promotes the UK-based expertise. The United Kingdom has been recognised as a forerunner in the creative industries. UK agencies have provided consultancy services to the Serbian government on multiple occasions and most importantly to help devise policies on creative industries. A Serbian Cultural Centre abroad is planned to be opened in London soon. The British Council Serbia has undergone a major transformation and now functions as one central Western-Balkans operation. The focus is on capacity building and providing Balkan youth with skills for the future. The Chevening Scholarship scheme is available in Serbia. Overall, however, the number of outgoing students to the UK is modest. The most important aspect in the higher education cooperation are joint degrees between Serbian and British institutions. No official agreement on scientific cooperation exists. With regards to the media, BBC News Serbian digital service launched in 2018. The desk greatly relies on the wider audience from the region and partnerships with local media outlets.

BRITISH INSTITUTIONS ARE VERY ACTIVE IN CAPACITY BUILDING PROGRAMMES

The work of the British Council involves support to the government with its reform agenda, support institutions on capacity building, and capacity building for youth. Its Visual Arts programme included capacity building schemes for local museums and curators. More important, however, is the ambitious project on new technologies in education, “**21st century schools**” (see Figure 3), implemented together with the Serbian Ministry of Education. The mission of the programme is to equip 1 million youth across the Western Balkans with core and digital skills. While all these initiatives help strengthen the local community, they also promote the United Kingdom as the partner of choice.

THE UK AS A FORERUNNER IN THE CREATIVE ECONOMY SECTOR

The Serbian government has on several occasions commissioned UK consultants to advise on a number of policies since 2015 (Emma Graham-Harrison, 2015). One of results was a special directorate created within the PM’s Office in 2018 – The Council for Creative Industries. Moreover, the Serbian Ministry of Culture announced the opening of another cultural centre abroad in London to serve as a contact point in the development of creative economy.

BRITISH INSTITUTIONS HAVE FAVOURED A REGIONAL WB6¹⁷ ENGAGEMENT

The regional Western Balkans approach has changed the nature of engagement. The British Council has severely scaled down its activities in Serbia. Field research suggests that the organisation operates on a reduced budget and that it has lost much of its visibility locally (RS009, RS011, RS002). BBC News Serbian made a comeback in 2018 and targets a regional audience (up to 80% of readership from the WB6). The service also relies on various partner websites in the region to host its content.

¹⁷ WB6 refers to the six Balkan countries outside the EU: Serbia, Bosnia & Herzegovina, Montenegro, N. Macedonia, Albania, and Kosovo.

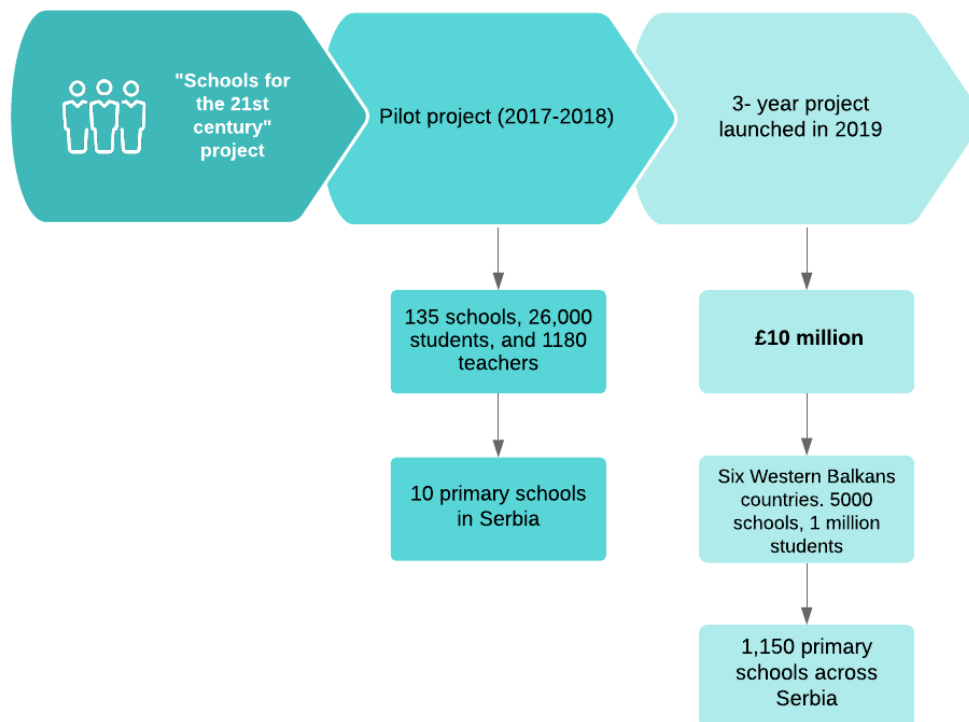


Figure 3. 21st Schools project

4 United States

ECP RECAP: The main relevant actor is the US Embassy in Serbia, Public Affairs Sector (PAS). There are 8 American Corners across the country. The Regional English Language Office (RELO) supports English language trainings. The US mostly focuses on assistance-style projects aimed at strengthening the rule of law, good governance, and support for cultural preservation and infrastructure. One of the overarching US goals is help Serbia making progress towards EU accession. PAS also provides grants to local NGOs (e.g. Democracy Commission Small Grants, up to \$25,000) and individuals (Alumni Small Grants). Moreover, PAS concentrates on the provision of a number of cultural and educational exchanges. In terms of overall spending, the US has increased its public diplomacy efforts in Serbia almost threefold in the last four years (U.S. Advisory Commission on Public Diplomacy, 2018). However, the commitment has so far not yielded visible results in the country. The image of the US is highly political in nature (1999 NATO campaign, Kosovo issue) and opinion polls often register negative public perception. (Note, the anti-US sentiment is at times exaggerated, since it remains a popular study destination). By extension, US-based or sponsored organisations and media often come under attack. The two American media outlets (Voice of America, Radio Free Europe / Radio Liberty) aim to establish themselves as sources of accurate reporting and try to counter potential Russian disinformation campaigns and influence. The US' involvement in the media extends through other programmes in capacity building and support to reform efforts. The private N1 cable news channel has become known for its professional journalism but also for attacks coming from the Serbian officials and corrupted elite. There is no bilateral science cooperation. Apart from a couple of discontinued exchange programmes, the PAS reports no major changes in its ECP. However, based on recent cultural events and extensive campaigns, the US seems keen to improve its tarnished public image.

INCREASED EXPENDITURE ON PUBLIC DIPLOMACY EFFORTS IN SERBIA

Serbia ranks currently 24th according to country-specific expenditures on US public diplomacy¹⁸. This represents an intensification in comparison to 2015 (see Figure 4). It should be however noted that US foreign assistance allocations have been almost halved under the new administration, as in 2018 only \$12.1 million was requested¹⁹ (Vincent L. Morelli, 2018, p. 14). Also, according to local experts, and considering how much has been invested so far, the US soft power is very weak in the country (US003).

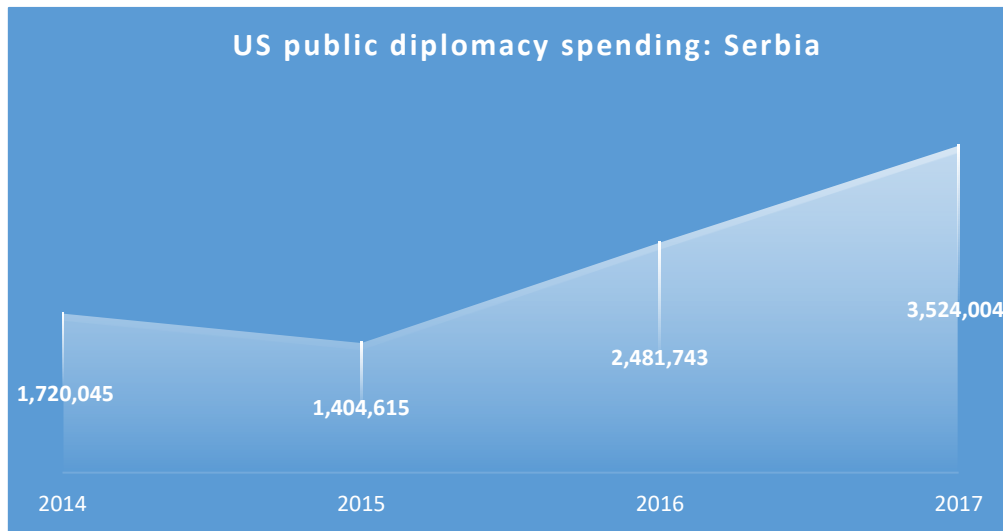


Figure 4. US public diplomacy expenditure in Serbia. Source: (U.S. Advisory Commission on Public Diplomacy, 2018, p. 34)

FOCUS ON THE PROVISION OF ACADEMIC AND CULTURAL EXCHANGES

Apart from assistance-style projects, a large share of the programming is focused on a number of cultural and educational programmes and activities (see Figure 5 and Table 1). So far, over 2,500 Serbians have taken part in US-supported exchange programmes (US002).

18 Based on field research however, the US Embassy did report a temporary freeze in its funding.

19 The Obama Administration requested approximately \$23 million in assistance for 2017 (ibid.).

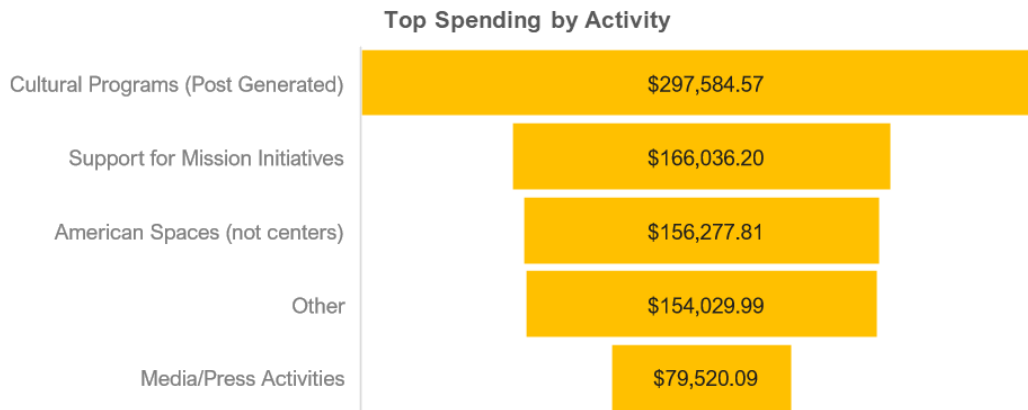


Figure 5. US' ECP expenditure in Serbia by activity

Source: (Addendum U.S. Advisory Commission on Public Diplomacy, 2018, p. 58)

Table 1. Participants of US programmes in Serbia

Source: US Embassy Serbia (US002)

<u>Academic exchanges</u>	
Fulbright programme	138
Future Leaders Exchange Programme (FLEX)	685
Benjamin Franklin Transatlantic Fellowship	15
Global Undergraduate Exchange Programme (UGRAD)	250
<u>Professional exchanges</u>	
International Visitor Leadership Programme (IVLP)	505
Open World Leadership Programme (OWLP)	440
Hubert H. Humphrey Fellowship	36
Total number of alumni of all US programmes (since 2001)	2,500

5 Russian Federation

ECP RECAP. Apart from the Russian support for non-recognition of Kosovo's independence, other main instruments of Russian influence are dependency on Russian energy supplies and common Slavic culture and Orthodox religion. Russia's presence is particularly strong in the public sphere. Polls show that up to two thirds of population see Russia as a friendly power (BCSP, 2017). However, the general appeal of the country is peripheral when compared to the West (IPSOS, 2016). The surveys of public opinion also show that the pro-Russian sentiment often rests on a lack of comprehension. Nevertheless, Russia has utilized such

circumstances by presenting itself as the protector of all Slavs and Orthodox believers. Russia and Serbia have well developed cultural, historical, and religious ties, but the proximity between two countries tends to be exaggerated. The main actors of Russia's ECP towards Serbia are the Russian Centre of Science and Culture (Ruski Dom), the Russian Embassy, and the Russkiy Mir Foundation with two centres. The interest in learning Russian is marginal compared to dominant foreign languages (English, German, French). The Russian cultural centre attracts mostly adult learners (ca. 500). The first international Russian school abroad, opened in Belgrade in 2017. In tertiary education, the Federal education programme reserves 130 scholarships for Serbian students. Other Russian organisations and think-tanks (e.g. the Alexander Gorchakov Fund, the Russian Institute of Strategic Research) are present. Russia additionally relies on a vast and fluid network of smaller local organisations that have all promoted Russian interests through various activities. Russian media penetration is not extensive, with only Sputnik Serbia news site as an established presence. However, Russia has the most cost-effective influence on the local media. It greatly relies on the mainstream media close to the government, especially political tabloids. Sputnik's output is small with a focus on impact and not quantity. Lastly, Russia increasingly uses religious diplomacy as an element of its soft power. The Russian Orthodox Church often acts in unison with other Russian public diplomacy bodies. Although the Russian and Serbian Orthodox churches enjoy a good relationship, the Serbian Orthodox Church remains primarily loyal to the Ecumenical Patriarchate (the Greek Orthodox Church).

A HIGHLY FLUID NETWORK OF PRO-RUSSIAN AND RUSSIAN ORGANISATIONS AND ACTIVITIES

Although these are not always Russian state-led activities, the Kremlin strengthens its position through a network of local proxies. These include media outlets, political parties, civic organisations, anti-NATO/EU movements, etc (109 organisations and media according to CEAS (2016)). In addition to that, a network of Russian institutions spans two branches of Russkiy Mir, the Alexander Gorchakov fund, many foundations, think-tanks. The Russian and Serbian orthodox churches maintain a close relationship. The activities of all these organisations are highly non-transparent.

RUSSIAN MEDIA PENETRATION IS NOT EXTENSIVE, BUT RUSSIA EXERTS THE MOST COST-EFFECTIVE INFLUENCE ON THE LOCAL MEDIA

Russia has the most cost-effective influence on the local media. It greatly relies on the Serbian mainstream media that are under the control of the ruling party. Also, pro-Russian narratives are created and disseminated by the local political tabloids. One research has shown that Serbian dailies had more positive texts about Russia than *Sputnik* itself (Velebit, 2019). *Sputnik*, launched in 2015, does not reach a large audience (see Figure 6). Instead, it relies on the local media. Reportedly up to 300 outlets publish its content daily – the focus is on impact and not quantity (RU002).

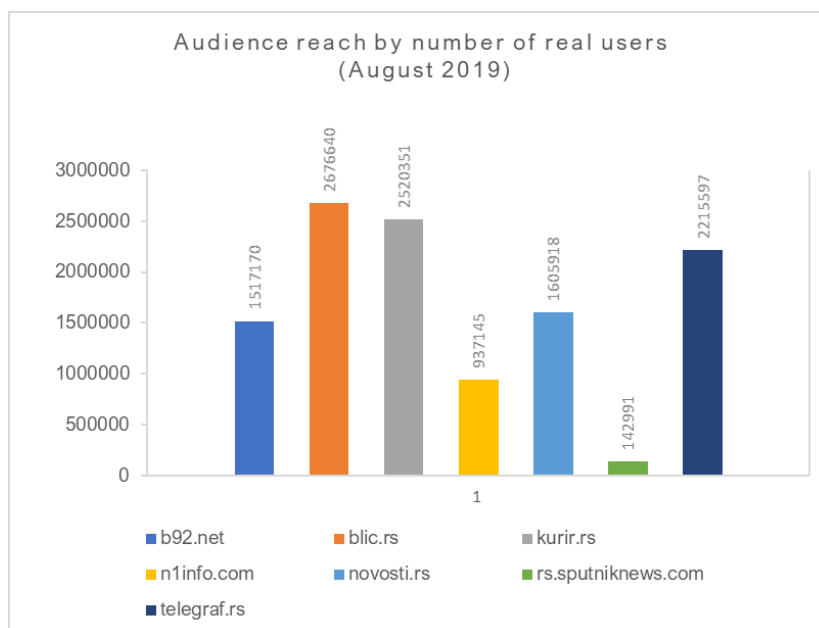


Figure 6. Sputnik Serbia website: Number of real users in August 2019, compared to that of other popular news sites in Serbia. Source: Gemius²⁰ (Last update: September 2019)

6 People's Republic of China

ECP RECAP. There are two Confucius Institutes, 1 Chinese 'Corner' and six Confucius Classrooms in Serbia. The first Chinese Cultural Centre is under construction in Belgrade and Serbia's second cultural centre abroad opened in Beijing. Chinese economic presence has grown rapidly in Serbia and intensification of diplomatic activity followed. Particularly important are culture and people-to-people exchanges. Chinese strategy is to "make friends" through Confucius institutes, Friendship Associations, BRI think-tanks and other programmes. China is increasingly present in various cultural contexts. In a very short period, it has positioned itself as the most important bilateral partner in the field of culture. With regards to language education, the Confucius Institutes have increased the scope of teaching activities by establishing cooperation with local institutions. In addition to that, two private universities have Chinese language courses integrated in their programmes. In 2011, the Serbian and Chinese ministries of education started a pilot project for learning Chinese in Serbian primary and secondary schools covering initially 2,462 students (RTS, 2012). Much of the science and higher education cooperation has been taking place within the CEEC cooperation mechanism. Chinese companies like Huawei are especially active in the ICT sector. China is stepping up its influencing efforts in civil society, academia, and think-tanks. One such high-level interaction mechanism is the 16 + 1 Think Tanks network launched in 2015 (Vangeli, 2018). Several Serbian think tanks are involved with the BRI project (e.g. CIRSD, COREC, etc). So far, there is no direct Chinese investment in the media, only cooperation agreements exist with local media outlets. China Radio International Serbian service has a very limited audience reach.

²⁰ Source: Gemius Audience. Available at <https://rating.gemius.com/rs/>.

INTENSIFIED DIPLOMATIC AND ECONOMIC ACTIVITY IS FOLLOWED BY INCREASED CULTURAL COOPERATION

Serbia has a very prominent role in the 16+1 group, since it is an important link in China's Belt & Road Initiative (BRI). The value of past and future Chinese investments in Serbia reaches \$10 billion (Politika, 2019). Serbian Ministry of Culture now regards China as the most important bilateral partner in the field of culture (RS002). Apart from the government level, people-to-people exchange has become a very important aspect, tourism especially. There has been a steady influx of Chinese tourists, 15 times more in 2018 than in 2011 (see Figure 7).

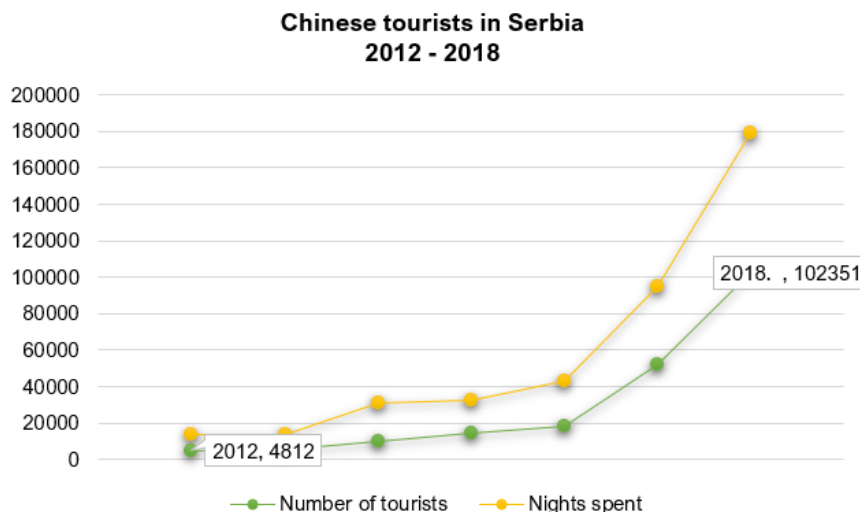


Figure 7. Influx of Chinese tourists

Source: Tourist Organisation of Serbia, April 2019

CONCENTRATED EFFORTS TOWARDS POPULARISING CHINESE LANGUAGE AND CULTURE

Table 2. The Activities of CI Belgrade. Source: The Confucius Institute in Belgrade Almanac (2017, 2018)

The Confucius Institute in Belgrade: Activities		
	2017	2018 (until October)
Number of cultural events	71	more than 60
Number of participants	39,000 (+5% increase to 2016)	ca. 30,000
Language education	2017	2018
Number of language courses		106
Number of language learners	1611 (+30%)	1658

According to polls, China still remains distant to the general public in Serbia (Igor Novakovic, 2013). Chinese institutions have therefore stepped up their efforts to promote the understanding of Chinese language and culture. For example, CI Belgrade reports slight increase in the number of visitors and language learners. The institute has further expanded the scope of its teaching activities by establishing cooperation with 20 institutions, including primary and secondary schools, cultural institutions and companies. CI activities support the BRI efforts. Mass cultural events are now organised on a regular basis (e.g the Chinese New Year, the Global Confucius Institute Day, Chinese Film Week, etc.).

7 Turkey

ECP RECAP. Under the ruling Justice and Development Party (AKP), Turkey assumed two approaches towards Serbia, a “neo-Ottoman turn”, and more recently a pragmatic shift towards good economic relations (Aydıntaşbaş, 2019, p. 7). Turkey shares strong historical ties with the Balkans that date back to the 14th century. However, unlike the Balkan Muslim communities, Serbs remember the Ottoman times as a period of enslavement. The exception is Sandžak, a region heavily populated by Muslim Bosniaks. Turkey has been active in the realisation of many investments and the protection of (Ottoman) cultural and historical heritage. Also, special attention is paid to cultural, academic and religious cooperation. The Yunus Emre Institute (YEE) has an expansive network across the Western Balkans, including one office in Belgrade. The institute oversees the language education and showcases Turkish history and culture, often in forms relevant for the Balkans. YEE Belgrade reports slight increase in language demand but has no capacities to respond to it. Another important actor is the Turkish development agency – TIKa. In Serbia, it works predominantly in education, healthcare, agriculture, and cultural heritage protection. Turkish secondary schools are operating in Sandžak. The Hizmet movement is linked to several cultural and educational institutions in Serbia. Serbian students and researchers can apply for the Turkish government scholarships (*Türkiye Bursları*). In terms of media engagement, Turkey’s state broadcaster TRT is available in all languages in the Balkans, including Serbian. However, compared to TRT Bosnian, the Serbian service is almost non-existent in terms of audience reach. Moreover, Turkey exercises its ECP through religious diplomacy, mainly through the Directorate of Religious Affairs – Diyanet. Other circumstances have influenced the rising popularity of Turkey: good bilateral relations and trade, tourism, and private mass entertainment industry (Turkish drama series).

TIKA HAS INCREASED ITS VISIBILITY

TIKA’s popularity has risen. One of the reasons has been the good relationship between two political leaderships. Also, TIKa awards its grants based on local project applications that it receives. Since 2010, TIKa has completed over 250 projects in Serbia, with the total cost exceeding \$40 million (TU002). The most important subsectors of TIKa’s work are education, healthcare, agriculture, and cultural heritage protection. Over 60 projects have been implemented in the area of education which makes it by far the most important sector (see Figures 8 and 9).

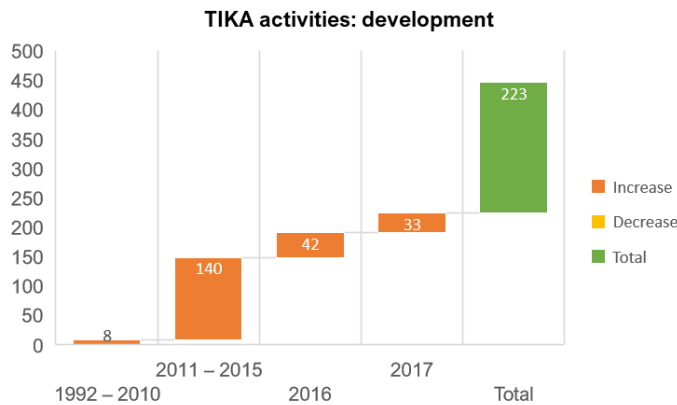


Figure 8. Development of TIKa's activities in Serbia



Figure 9. TIKa's activities by field

8 Qatar

ECP RECAP. The presence of the Gulf States has become more visible in Serbia over the last years, especially Saudi Arabia and UAE. However, no evidence of strong Qatari involvement in foreign cultural diplomacy was found. There are no cultural institutions in Serbia that promote Qatar's language, culture and traditions. Cultural events are reduced to singular activities. The only instrument of Qatar's soft power is Al Jazeera Balkans (AJB) regional network headquartered in Sarajevo, Bosnia and Herzegovina, and with smaller studios in Belgrade, Skopje and Zagreb. AJB is considered a very modern media outlet. Although its arrival was first questioned, now it is considered a more 'objective' source of information compared with so many local media with hidden political and nationalistic agendas (Bashota et al., 2019). AJB has a visible social media presence. Its channel was among the top-watched regional media on YouTube (AJB, 2019), (YT: 150,000 subscribers; last data update: 31/07/2019).

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21 For the complete list of references and sources, please consult the full Serbia report.