

THE FALSE PROMISE OF INDIA'S SOFT POWER

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ABSTRACT. Since the early 2000s, in keeping with India's rise on the world stage, the scholarly and policy communities in India and abroad have witnessed a steady increase in writing on India's soft power. Many of these assessments are optimistic, placing faith in India's potential as a civilizational great power with considerable resources arising from its culture, domestic ideology and diplomacy. However, in terms of impact, Indian soft power has fallen far short of expectations. Significant sections of public opinion in the West and in Asia are still not favorable toward India. Moreover, one is hard pressed to identify a significant role played by soft power in India's diplomatic gains since the early 1990s. This paper argues that India's inability to capitalize on its soft power resources is the result of three factors. First, the over-estimation of these resources by analysts. Second, the lack of sufficient hard power to undergird India's soft power ambitions. And finally, unresolved elements of India's identity that tend to undermine its efforts at soft power projection through public diplomacy.

Keywords: India; foreign policy; soft power; public diplomacy

1. Introduction

The concept of soft power is an artifact of the post-Cold War world, as is the rise of India. Both have grown in prominence during the same period, and observers have increasingly drawn a link between the two. Writing in 2003, Indian foreign policy analyst C. Raja Mohan argued:

The spiritualism of India has attracted people from all over the world, and its Gurus have travelled around the world selling yoga and mysticism. Bollywood has done more for Indian influence abroad than the bureaucratic efforts of the Government. From classical and popular music to its cuisine, from the growing impact of its writers and intellectuals, India now has begun to acquire many levers of soft power.

The growing consensus in the literature is that India possesses considerable soft power resources arising from its universalist culture, democratic political institutions and tradition of leadership among developing nations. Consequently, in the new millennium, Delhi began a concerted effort to channel these resources – including those of Indians living abroad – into generating soft power that might produce beneficial foreign policy outcomes (Hall 2012).

However, for a country almost destined to provide significant moral leadership in the post-Cold War world, India's soft power resources have frequently proved not up to the task (Blarel 2012). Various surveys and impressionistic reviews of India's cultural capital among publics around the world have shown that world opinion is still nowhere near as favorable as it should be given expectations (Hymans 2009). This basic fact presents an empirical puzzle: how is it that a nation such as India with a history of moral authority and leadership among developing nations, a tradition of statesmen highly regarded by interlocutors in the international sphere, and considerable cultural and domestic political resources to attract other nations to its cause could have failed to successfully wield soft power in order to achieve a favorable political environment for its foreign policy goals? Nowhere is this shortcoming more glaring than in India's own neighborhood, where perceptions in almost every state range from ambiguous to openly hostile toward India's regional hegemony (Gateway House 2012).

In this paper, I argue that India's shortcomings are due to three factors. First, India's soft power resources have been over-estimated by analysts, who pay insufficient attention to the manner in which a state's soft power resources might conflict with each other and send mixed messages to international audiences. Second, although increased emphasis on India's soft power has accompanied its rise along traditional hard power dimensions, the latter have not developed to a level sufficient for the former to have a noticeable impact on India's foreign policy. Finally, as with any state, the credibility of India's soft power lies in the coherence of its national identity, and India has not yet resolved the many contradictions in its self-image in a manner that might lend to the successful utilization of its latent soft power resources.

In the next section, I discuss existing work in the area of soft power, and India's soft power in particular. Section III develops the empirical puzzle of Indian soft power more fully. Section IV contains the main argument of this paper, and Section V concludes.

2. Soft Power and India

Soft power is, in essence, the power of attraction. It is defined as the ability of a state to get what it wants through attraction rather than coercion or payments (Nye 2004). Soft power is not the power to command others to

obey one's orders, nor is it the power to bribe or buy the support of others through economic inducements. Therefore it grows neither out of military power nor economic weight in world affairs. Rather, it inheres in the attractiveness of a country's culture, political ideals and domestic and foreign policies. These assets are rightly called "intangible" (ibid.), to the extent that one cannot "hold" a nation's culture in one's hand as one might hold a gun or monetary instrument. What soft power does have in common with other power resources is that its effectiveness is increased when it is projected. In other words, public diplomacy is a key ingredient of soft power's potency. Public diplomacy is "The process by which direct relations with people in a country are pursued to advance the interests and extend the values of those being represented" (Sharp, cited in Melissen 2005, p. 8). Public diplomacy does not focus on specific policy issues (a task better suited to lobbying); neither is it ideological in its content (like propaganda). Rather, it focuses on "building long-term relationships that create an enabling environment for government policies" (Nye 2004, p. 107).

Arguably, India has considerable soft power resources, and since the early 2000s it has also been actively promoting its soft power credentials around the globe and to its own people (Suri 2011), who tend to mostly know and care little about their nation's foreign policy (Kapur 2009). Among the various commentators who have enumerated India's soft power resources, Tharoor (2008, p. 40) is perhaps the most enthusiastic. Analysts often cite his famous passage below:

When India's cricket team triumphs or its tennis players claim Grand Slams, when a Bhangra beat is infused into a western pop record or an Indian choreographer invents a fusion of Kathak and ballet, when Indian women sweep the Miss World and Miss Universe contests or when Monsoon Wedding wows the critics and Lagaan claims an Oscar nomination, when Indian writers win the Booker or Pulitzer prizes, India's soft power is enhanced.

Clearly, India's soft power resources are multi-faceted – they include sports, music, art, film, literature, and even beauty pageantry. To this list, others have added India's anti-colonial history, democratic institutions, free press, independent judiciary, vibrant civil society, multi-ethnic polity, secularism, pluralism, skilled English-speaking workers, food, handicrafts, yoga, India's status as a responsible nuclear power, the rapid growth of the information technology sector in places such as Bangalore, and the existence of a large Indian diaspora in certain western countries (Blarel 2012, Malone 2011, Purushothaman 2010, Hymans 2009, Mohan 2003). In similar fashion to studies of the soft power resources of countries as diverse as China (Cho and Jeong 2008, Garrison 2005), Russia (Hill 2006) and Japan (Lam 2007), scholarship on India has produced a laundry list of attributes, though perhaps on a greater scale than for other countries that are clearly undemocratic or

not multi-ethnic. It is therefore difficult to know what precisely one should look for in assessing the impact of India's soft power. Nonetheless, there is a general sense in which one can expect at least public opinion to view India favorably as a result of these factors.

The attributes listed above pertain largely to the first two sources of soft power as outlined by Nye (2003): culture and political ideals. The third factor, a state's domestic and foreign policies, is equally important. Nye (2004, p. 14) argues that "The values a government champions in its behavior at home (for example, democracy), in international institutions (working with others), and in foreign policy (promoting peace and human rights) strongly affect the preferences of others." Thus policies that are consensual, cooperative and peaceful can generally be viewed as being attractive to other states. Although this metric rests on some problematic assumptions about what other states might find attractive (Hymans 2009), in general one can accept its validity for the post-Cold War US-dominated world order, which is precisely the period in which Nye (2002) believes the exercise of soft power is most vital. In the Indian context, it is important to clarify that soft power is *not* to be found in India's trade, investment, or foreign aid policies, as some have claimed (Lum et al 2008, Mullen and Ganguly 2012). While it is true that economic prosperity breeds attraction (Huang and Ding 2006), economic diplomacy is more appropriately categorized as an instrument of hard power, particularly the use of negative and positive inducements to coerce and buy the support of others respectively.

While many analysts highlight the plentiful resources India has at its disposal, they are also quick to point out that India has not fully utilized its soft power toolkit, an assessment that one frequently hears of China as well (Gill and Huang 2006). Malone (2011, p. 39) highlights the trade-offs between a soft power strategy based on democracy promotion and the management of sensitive bilateral relationships with countries such as Iran and Myanmar. Hymans (2009, p. 234) argues that "India remains a minor soft power in the contemporary world" because it has abandoned the soft power ambitions of its founding generation of leaders, especially Gandhi and Nehru. On the role of India's free press, Baru (2009, p. 283) admits that "there is little proof as yet of Indian 'soft power' shaping 'foreign policy' of other countries towards India, or India's policy towards others." On the question of public opinion, Lee (2010, p. 11) correctly notes: "the fact that the general public in many countries like India (or does not fear its rise) does not necessarily translate into broad-based Indian 'soft power.'" Even Tharoor (2009, p. 41) – an ardent believer in India's soft power –concedes that "we [India] could pour far more resources and energies into our cultural diplomacy to promote the richness of our composite culture into lands which already had a predisposition for it." The record, therefore, is decidedly mixed and deserves more systematic scrutiny.

3. India's Soft Power Shortcomings

The central empirical puzzle of this paper, as discussed above, is the question of why a state such as India, in possession of considerable soft power resources, has been unable to wield them effectively. Measuring the impact of soft power, however, is an inherently fraught enterprise. Soft power – and public diplomacy, by extension – is not aimed at specific goals, individuals, or events. Rather, it is aimed at creating an *enabling political environment* for a country's foreign policy. In other words, it has “milieu goals” (Melissen 2005, p. 12). Although Nye (1990) refers to soft power as the “second aspect” of power – the first being hard power – it is closer to what Lukes (1974) calls the “third dimension” of power, whereby the power-holder's aim is to influence the preference formation process of another actor in such a way as to exclude the other's real interest from the political process altogether (as opposed to issuing a command or excluding the other's preferences from the agenda). This characteristic of soft power makes its impacts extremely difficult to measure – not only are soft power resources intangible, their impacts are also intangible in addition to being diffuse and long-term in nature. This is why many analysts rely on public opinion surveys or indicators that suggest the workings of soft power but cannot directly observe them.

Unfortunately for India, public opinion in other nations has not been as kind as Delhi would have hoped for. Hymans (2009, p. 256) notes studies that show that since the late 1970s, Americans have evinced moderately negative feelings toward India. In a 2006 survey by the Chicago Council on Global Affairs, they expressed slightly negative feelings – a score of 46 out of 100 (down from 49 in 1978), where 50 was a neutral score (ibid.). In the same survey, 42 percent of respondents said that the United Nations Security Council's membership should not be expanded to include India (a major goal of Indian foreign policy), while only 29 percent and 32 percent opposed Japan and Germany respectively. 71 percent of respondents opposed the highly publicized agreement on civilian nuclear cooperation between India and the US; 40 percent favored the use of US troops to maintain peace between India and Pakistan (a decidedly adverse outcome for Indian foreign policy); 47 percent said India practiced unfair trade with the US; 54 percent opposed a US-India free trade agreement; 66 percent opposed the purchase of a controlling interest by Indian firms in American companies; 69 percent viewed a future militarily powerful India as a negative development; and only 49 percent trusted India to act responsibly in world affairs. Within Asia, a Pew Global Attitudes survey in 2012 found both Chinese and Pakistani perceptions of India declining between 2006 and 2012, while Japan's perceptions improved (Fig. 1 in Appendix). In India's immediate neighborhood, a 2012 qualitative study highlighted considerable variance: analysts from Afghanistan and Bhutan concluded that their respective nations' perceptions

of India were positive, while those from Bangladesh and Sri Lanka complained of a “trust deficit” and those from Pakistan and Nepal criticized India’s “big brother” attitude toward their nations. Nonetheless, a number of these observers cited long-standing cultural relations between their nation and India (including the popularity of Bollywood films), which arguably has an ameliorative effect on otherwise problematic perceptions (Gateway House 2012).

Aside from opinion polls, one can also look at the impact of a country’s culture and domestic institutions by measuring the numbers of individuals who want to visit the country for education, immigration and tourism. In the case of foreign students in India (Fig. 2 in Appendix) the numbers have fluctuated over time, to the extent that there were more foreign students in India in 1986 than there were at any time between 1996 and 2003. The composition of foreign students in India also provides an indication of where India’s soft power may be having an impact. For the period from 2005 till 2008 (for which data are available) the countries of origin were overwhelmingly from the Middle East and South Asia, with a smattering of African countries (Fig. 3 in Appendix). This suggests that India’s allure does not expand much beyond Asia, a finding that is especially stark when one considers the countries to which Indian students most frequently go for higher education: America, England, Australia, New Zealand and Canada. The stock of international migrants in India presents a similar picture as above, with 98 percent of the 5.3 million migrants living in India in 2010 coming from neighboring countries (Fig. 4 in Appendix).

Tourism is a potential bright spot for India – for the years that data are available, we find a sizeable increase of arrivals in India of 24% between 2007 and 2011, with the bulk of tourists arriving from Europe, the Americas and East Asia. However, even in the realm of tourism, India does not score highly relative to other countries. In a 2012 ranking of country brands in tourism, India came in 23rd, behind China, Turkey and Russia (Table 1 in Appendix). This finding points to a larger challenge for India’s soft power – although the influx of international students, migrants, and tourists has been growing over time, it is still far short of the pull that other major powers exert on these international flows. A similar picture emerges when one looks at India’s relative attractiveness as a destination for investors, a metric that speaks to the quality of India’s domestic institutions, political culture, and business climate. In a ranking of country brands in the realm of Foreign Direct Investment (FDI), India came in 15th, after China, Brazil and Turkey (Table 2 in Appendix).

India’s overall image in the world suffers from similar problems. A 2012 ranking of country brands based on a composite index of a country’s governance, investment climate, human capital, growth, sustainability and influence put India in 42nd place out of 118 countries – an uncomfortable spot for an

aspiring great power with much vaunted soft power reserves. The same report also listed a set of fifteen countries that showed future promise on the metrics listed above. India came in 13th on this list, behind countries such as Colombia, Thailand, Malaysia and Chile (Table 3 in Appendix). And finally, in a 2011 study aimed at ranking the world's top 30 countries in terms of soft power (McClory 2011) – a composite index of the quality of government, culture, diplomacy, education, and business/innovation (based on objective measures and subjective assessments of an expert panel) – India ranked 27, slightly ahead of Russia and just behind Israel (Fig.5 in Appendix). It appears therefore that although India's soft power has had beneficial effects in absolute terms over time – as measured by the inflow of foreign students, tourists and migrants – its relative standing among nations as well as perceptions of India among the citizens of other countries still leave much to be desired.

4. Explaining India's Under-Performance

Historically, India was a rather adept wielder of soft power. The long struggle against British colonialism spearheaded by internationally renowned leaders such as Jawaharlal Nehru and Mahatma Gandhi had earned India much goodwill in the years following independence in 1947 (Hymans 2009). During the 1950s and 1960s, India was able to punch above its weight in international affairs – much as a state like Norway does today – by projecting itself as a champion of peaceful conflict resolution in forums such as the United Nations (Purushothaman 2010). Moreover, Nehru's leadership of the Non-Alignment Movement (NAM), which eschewed the hard power politics of the Cold War, won India many friends and admirers in the newly decolonized nations of Africa and Asia. India in turn leveraged this recognition into a leadership role and advocated for the rights of the Third World in multilateral settings throughout the Cold War (Mistry 2004). To the extent that soft power was a "strategy" adopted by Nehru and his compatriots, it was in this period a substitute for hard power as India undertook the strenuous task of building its economic reserves and military capabilities.

As the Cold War wore on, Nehru was succeeded eventually by his daughter Indira Gandhi, who continued to speak the language of non-alignment and anti-imperialism but pursued policies that were far more "realist" in substance. This had the effect of undermining some of India's international legitimacy, especially when India concluded a defense pact with the Soviet Union in 1971. The following two decades were also marked by increasing Indian interventionism in the affairs of neighboring countries, especially Sri Lanka, Nepal, and the Maldives. The end of the Cold War, according to one scholar, marked a transition from *realpolitik* back to softer forms of diplomatic in-

tercourse for India, largely due to the realization that hard power had failed to achieve beneficial objectives in the preceding two decades (Wagner 2005). While this might be true in terms of grand strategy, it was certainly not the case that any of the foreign policy gains made by India after 1990 were due to its use of soft power. Increases in investment from and trade with developed economies, rapprochement with the US in the mid-2000s, and improvements in bilateral relations with other South Asian states (including Pakistan, despite setbacks) can all be traced back to the end of the Cold War and India's economic liberalization and rapid growth since 1991. Soft power has been a very minor aspect – if at all – of Indian foreign policy during this period.

India's shortcomings on this front are due to three factors. First, its soft power resources are not as abundant as proponents of the idea might suggest. India's cultural influence abroad, while significant, pales in comparison to the cultures of the West already in circulation around the globe, and increasingly in comparison to Chinese culture in circulation in Asia and beyond. Official and semi-official Indian modes of cultural dissemination are also relatively few. For many decades, organizations such as the Peace Corps, Alliance Francaise, the British Council, the Goethe Institut and the Japan Foundation have been promulgating the respective cultures of the great powers around the world. They have most recently been joined by China's Confucius Institutes, which numbered 322 in 2011 (Na 2012). Although the Indian Council for Cultural Relations (ICCR) has been around since 1950 with the aim of conducting activities similar to the organizations already mentioned, as of January 2013 it did not have more than 35 centers in foreign countries (ICCR 2013). Moreover, it was only in 2004 that India established its Ministry of Overseas Indian Affairs to better leverage the presence of millions of Indians abroad, and only in 2006 that India's Ministry of External Affairs established a division dedicated to public diplomacy (Suri 2011). In the realm of non-governmental cultural dissemination, Bollywood has been a major force and yet despite producing more films than Hollywood annually, the size of the former remains considerably smaller than that of the latter: Hollywood's 2010 worldwide box office receipts alone were estimated at \$US 31.8 billion (Verrier 2011), whereas Bollywood's entire industry size in 2010 was estimated at \$US 1.8 billion (FICCI-KPMG 2011). Moreover, Bollywood's international diffusion is not as strong as many analysts argue – in 2011, overseas theatrical sales constituted only eight percent of total industry revenue (Fig. 6 in Appendix).

Although Indian culture, which is based largely on universalist and assimilationist Hindu principles, is a potent source of attraction, India's domestic institutions and foreign policy have mitigated this effect on the perceptions of outsiders. In the domestic realm, India has done a much poorer job of lifting its population out of poverty when compared to China. Although

growth has been impressive, India's per capita income leaves it in the ranks of countries such as Sudan, Ghana, the Solomon Islands, and Nigeria. Although the government has made major strides in liberalizing the economy, many sectors remain highly regulated. India's public institutions are rife with corruption, inefficiency, patronage and nepotism. In Transparency International's 2012 Corruption Perceptions Index, India ranked 94 out of 174 countries, tied with Benin, Colombia, Greece, Moldova, Mongolia, and Senegal (China ranked 80). In the words of one analyst (Malone 2011, p. 38), "no amount of cultural promotion can undo the damage internationally caused by spectacular corruption scandals" of the sort that India has recently been witness to, and that have given rise to an anti-state social movement that made international front page news in 2011. In the international realm, India has not pursued the types of cooperative and conciliatory policies required to garner soft power resources. Particularly in the realm of global governance, India has been accused of being a spoiler on issues as diverse as trade, nuclear non-proliferation, and humanitarian intervention. On trade, India was held responsible to a great extent for blocking the efforts of the great powers to rescue the Doha Round in 2009 (Blustein 2009). On nuclear non-proliferation and testing, India continues to be a non-signatory to the Non-Proliferation Treaty (NPT) and the Comprehensive Test Ban Treaty (CTBT), despite having received official recognition as a nuclear power via the 2008 agreement with the US on civilian nuclear cooperation. On humanitarian intervention, India's approach to crises in Libya and Syria during its recent term on the UN Security Council invited much criticism from the West (Kelemen 2011). As with China – which itself is struggling to increase its stock of soft power – Western observers are frequently heard asking if India can be a "responsible stakeholder" in the international system (Dormandy 2007). All these factors point to major obstacles in the way of India's soft power ambitions, obstacles that might have been irrelevant had India been more powerful.

Which leads to the second reason: India is not sufficiently far along in terms of hard power resources for its soft power to make a difference in its foreign policy. Although in earlier periods India had relied on soft power as a substitute for hard power, India's attractiveness following the end of the Cold War grew precisely because of its hard power resources, specifically economic growth, which made India a desirable international partner. It is no coincidence that references to India's soft power grew in frequency only after its economic gains were consolidated and the world could be optimistic about India's fortunes. In this sense, India's trajectory corroborates the argument of various analysts that soft power is most effective when backed by hard power (Tharoor 2008, Lee 2010, Blarel 2012). Soft power is therefore not only generated by hard power (all else being equal, other countries are drawn to success), it also facilitates the smoother exercise of hard power by influencing the preferences of those who are the targets of a state's foreign

policy. India, however, is not at the point yet where the precepts of Joseph Nye – which were meant largely for an American audience – might apply. Instead, India remains in a transitory phase where its hard power is yet to become preponderant even regionally to the point where it can meaningfully project its soft power in order to create a political environment conducive to its international goals. Although India is not in the position of China, which wields considerable hard power but lacks the required domestic legitimacy to successfully wield soft power, it does lack many of the ingredients that make soft power a useful tool for states such as the US and Western European countries that can rely on an astute mix of hard and soft power to effect outcomes in world politics. Indeed, as one scholar has argued (Hanson 2012, p. 13), India’s primary challenge lies in “gaining the attention, status, and recognition of a global power,” rather than in battling any negative perceptions that its rise may have created in other states (as is the case with China). This recognition is likely to come only when India addresses its internal problems and devises a more cooperative foreign policy within the existing global order.

The third and final cause of India’s underperformance with regard to soft power is the contested nature of India’s own identity. India’s ruling elites have yet to determine what kind of power their nation will be as it continues to rise, and this indecision contributes to a sense of incoherence in the portrayal of India’s image to the world. On the one hand, India is the second-largest contributor to the US-led UN Democracy Fund for the promotion of democracy around the world; on the other, it continually reiterates its unwillingness to become an exporter of democracy, i.e. to externalize its domestic political values. Consequently, states and peoples that look to India for leadership on democratization – such as Myanmar – are frequently frustrated by India’s unwillingness to commit to a coherent policy on democracy promotion. In a similar vein, on the one hand, India is increasingly a member of small groups of powerful states that determine the course of international bargaining over global issues such as trade, climate change, and international security; on the other, it clings to its identity as a developing and non-aligned country, remaining an active member of the Non-Aligned Movement and frequently arguing for special privileges due to its developing-nation status (e.g. on climate change). Consequently, poorer countries in international organizations – such as the African nations and small island states in the climate change negotiations – are often frustrated by what they perceive to be India’s pursuit of self-interest over the interests of developing nations, and rich countries decry India’s unwillingness to compromise on issues that might cede some ground to the developed world (e.g. in trade negotiations). At a more basic level, India’s multiple social and political identities – Hindu, Islamic, economically liberal, protectionist, conscientious objector to nuclear treaties, responsible nuclear power, staunch supporter of human rights, opponent of humanitarian intervention – continue to conflict with each other both within

Indian policymaking and in the messages and images that India portrays to the world. The end result is confusion at the receiving end, unpredictable policy shifts, and general distrust among India's interlocutors, none of which is conducive to the effective exercise of soft power.

All these factors taken together explain the limited success that India has had in exercising its soft power. Although India's cultural resources are great, its internal dynamics and foreign policy are not attractive enough for states to want what India wants. Moreover, India is not yet powerful enough in the conventional sense to attract followers in international affairs. And finally, India's confusion over its own identity as it negotiates its rise contributes to a fundamental incoherence in India's external image.

5. Conclusion

When introducing the concept of soft power, Nye (1990, p. 166) argued that "it is just as important to set the agenda and structure the situations in world politics as to get others to change in particular cases." Soft power can help a nation set the agenda and alter the preferences of other nations before they come to the bargaining table. Its main instrument – public diplomacy – aims for milieu goals, the creation of an enabling political environment for a state's foreign policy. However, as argued by Melissen (2005, p. 14), "public diplomacy cannot achieve its aims if it is inconsistent with a country's foreign policy or military actions." To foreign policy and military actions one must add domestic values, politics, and institutions. In order for soft power to succeed, a country's message to the world cannot be at odds with the way it conducts itself at home and abroad. India, unfortunately, does not at this stage possess a coherent message or image. While this is partly a facet of the chaotic nature of India's democratic politics and the path it has taken toward great power until now, if soft power is truly to serve its interests India must take steps to address its domestic challenges and identity contradictions. In some respects, the issue is a matter of time. However, soft power has the potential to multiply the efforts of Indian diplomacy, and in this regard should be pursued as an important objective. Until now, however, the Indian government's efforts have been incomplete, focusing more on image management than building long-term relationships (Hanson 2012). Moreover, due to the factors discussed in this paper, India's efforts at projecting soft power have met with limited success. India's ruling elite must recognize that world opinion punishes inconsistency between words and deeds, and no amount of cultural capital can overcome the drawbacks of India's domestic politics and current identity crisis. It remains to be seen whether decision makers in Delhi will be able to resolve the inconsistencies that are bound to exist in a diverse nation of more than a billion people.

NOTE

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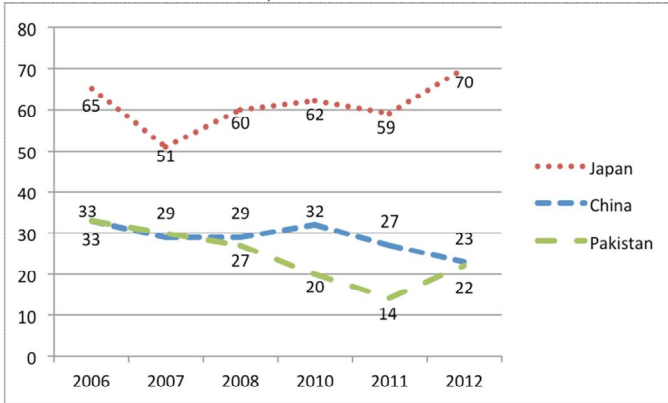
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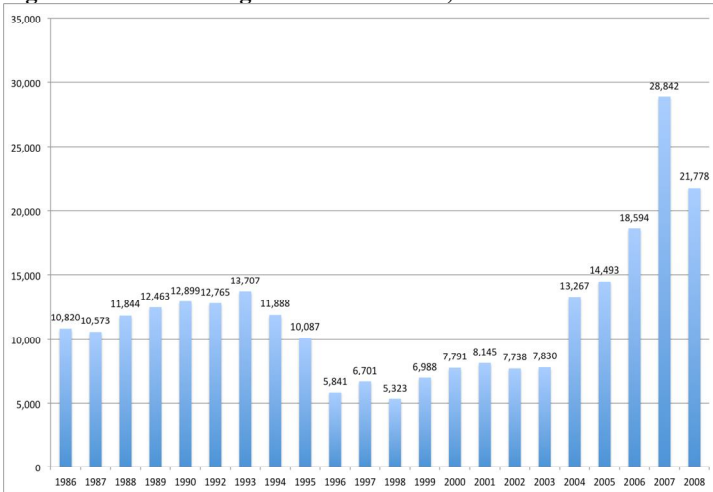
APPENDIX

Fig. 1 Favorable Perceptions of India in Japan, China and Pakistan, 2006–2012



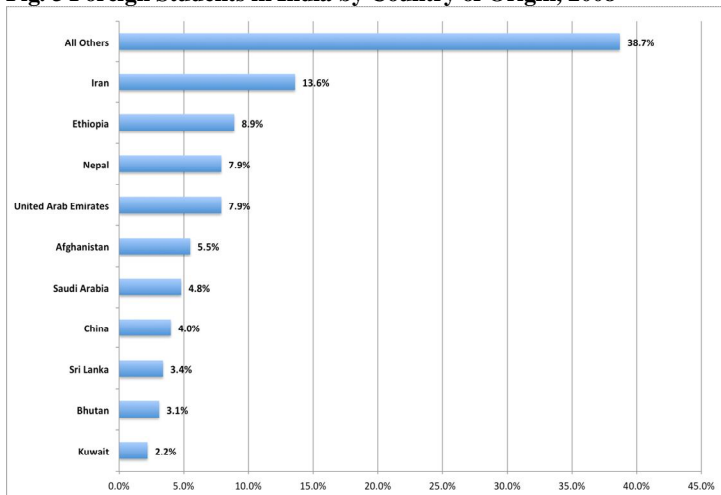
Source: Pew Global Attitudes Survey

Fig. 2 Number of Foreign Students in India, 1986–2008



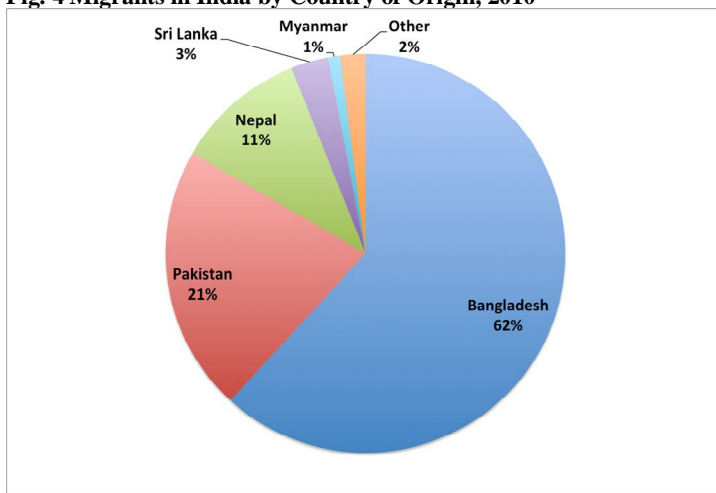
Source: www.indiastat.com, and the Association of Indian Universities

Fig. 3 Foreign Students in India by Country of Origin, 2008



Source: Institute for International Education, Project Atlas

Fig. 4 Migrants in India by Country of Origin, 2010



Source: The World Bank's bilateral migration matrix, 2010

Table 1 Country Brand Ranking in Tourism, 2012

RANK	COUNTRY	RATING
01	United States	Strong
02	Spain	Very Strong
03	France	Strong
04	China	Slightly Strong
05	Turkey	Very Strong
10	Australia	Very Good
15	Netherlands	Very Good
20	Russian Federation	Slightly Strong
23	India	Slightly Strong

Source: Bloom Consulting Country Brand Ranking: Tourism Edition 2012.

Note: Rankings reflect a composite index of historical (last five years) volume of tourist receipts, historical growth rate of tourism receipts, and rating, or degree of alignment with online tourist demand. A high rating with low ranking reflects a good brand with poor relative performance.

Table 2 Country Brand Ranking in Foreign Direct Investment (FDI), 2012

RANK	COUNTRY	RATING
01	United States	Very Good
02	Luxembourg	Strong
03	China	Very Good
04	United Kingdom	Slightly Strong
05	France	Very Strong
08	Canada	Very Good
11	Brazil	Very Good
14	Turkey	Very Strong
15	India	Good

Source: Bloom Consulting Country Brand Ranking: Trade Edition 2012.

Note: Rankings reflect a composite index of historical (last five years) volume of FDI, historical growth rate of FDI, and rating, or degree of alignment with online investor demand. A high rating with low ranking reflects a good brand with poor relative performance.

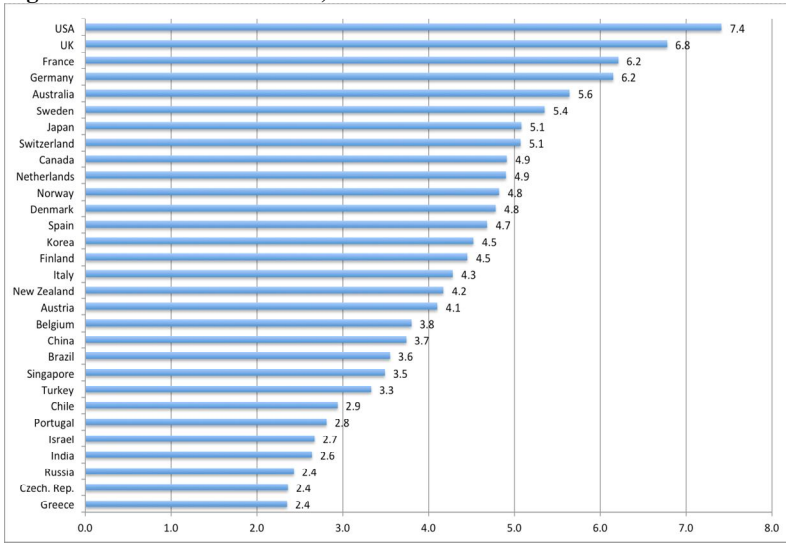
Table 3 Future Top 15 Country Brands in 2012

RANK AMONG FUTURE BRANDS	OVERALL RANK IN 2012	COUNTRY	MAIN DRIVER
01	23	United Arab Emirates	Growth
02	34	Chile	Human Capital
03	36	Malaysia	Human Capital
04	72	Qatar	Growth
05	56	Estonia	Governance/Investment
06	66	China	Influence
07	22	Iceland	Governance/Investment/Human Capital
08	51	Mexico	Growth
09	28	Brazil	Influence
10	45	Turkey	Influence
11	26	Thailand	Investment/Human Capital
12	85	Colombia	Growth/Influence
13	42	India	Influence
14	n/a	Kazakhstan	Sustainability
15	69	Vietnam	Growth

Source: FutureBrand Country Brand Index, 2012-13.

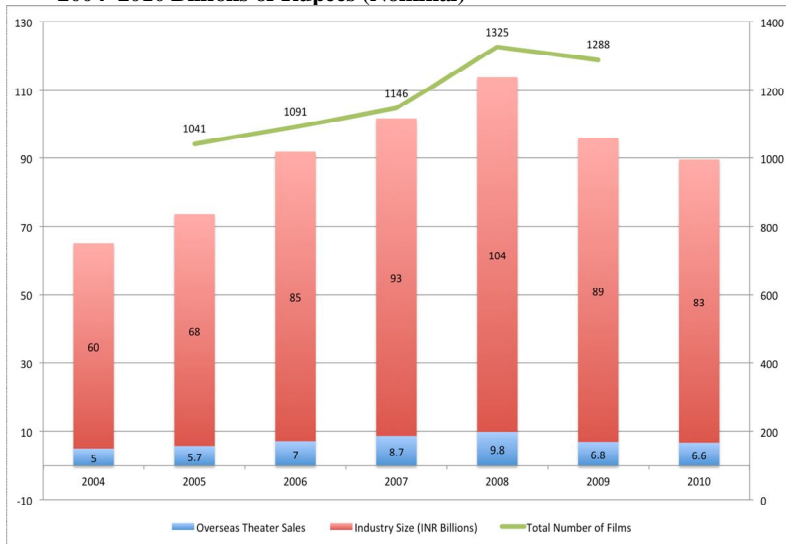
Note: Rankings reflect opinion-formers' and frequent travelers' assessments of the future potential of a country's value system, quality of life, business climate, and heritage and culture. These dimensions produce rankings of governance, investment, human capital, growth, sustainability and influence, which are aggregated into a composite index.

Fig. 5 Global Soft Power Index, 2011



Source: Jonathan McClory, *The New Persuaders II: A 2011 Global Ranking of Soft Power*.

Fig. 6 Bollywood’s Industry Size, Overseas Sales and Number of Films, 2004–2010 Billions of Rupees (Nominal)



Source: FICCI-KPMG Indian Media and Entertainment Industry Report 2011