ELCANO GLOBAL PRESENCE REPORT

REAL INSTITUTO elcano ROYAL INSTITUTE

C/ Príncipe de Vergara, 51
28006 Madrid
www.realinstitutoelcano.org

ISSN: 2255-5293
Depósito Legal: M-36047-2013

ELCANO GLOBAL PRESENCE REPORT 2015

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Executive summary

United Kingdom up one position, Germany down one

This year's edition of the Elcano Global Presence Index ranks 80 countries according to the extent to which they are currently 'out there', participating in and shaping the process of globalization. Given that this index reflects mainly structural trends rather than short-term events, it comes as no surprise that there are virtually no changes within the top 10 positions of the 2014 ranking in relation to the previous year. The only relevant change is that the United Kingdom climbs one position to claim 2nd place, leaving Germany in 3rd. As a result, the new top 5 starts with the United States (leading the ranking since 1990), followed by the United Kingdom, Germany, China, and France. It should be noted, however, that the up-scaling of the British position responds in large part to a massive sale of gold to Switzerland in 2013; probably a one-time event, and one that might be insufficient for holding the country at its current position in future editions of the index.

From global to local – domestic weaknesses and strengths and their impact on a country's global presence

If we consider the European Union as a single global actor –adding together the global presence of its 28 members while subtracting their intra-European projection– this region would top the global presence ranking. At 1,214.9 points, the combined figure for the entire Union represents the result of relative contributions from all the member states to the aggregate global presence. The United Kingdom is the top contributor (at 19.8%), followed by Germany (16.9%) and France (14.7%), meaning that these three countries alone account for over half of total global presence by the European Union. These strong showings are the result of various national specializations and strengths: British investments, exports of services and primary goods, and development cooperation; German manufactures and services; and French investments outside the Union's boundaries. These profiles of presence can also be disaggregated at the country level. In the case of Spain, the country's external projection is to a great extent the result of international tourism in Catalonia, the Baleares, the Canary Islands, and Andalusia, alongside outward investments channelled through Madrid and export activities from Catalonia.

'Chermany', rather than Europe's Big 5 versus the BRICS

As mentioned in previous editions, the index illustrates the upward trend toward a greater presence by emerging countries in the global arena, in parallel to a decline by Western (particularly European) powers. A closer look at these two groups (the European Big 5 and the emerging BRICS) shows a significant level of concentration, in both groups, into a small number of countries. In that respect, we might instead speak of the rise of 'Chermany', where Germany and China (leaders in their regions) may have been feeding one another's global presence over the years. Such an analysis also reveals the differences between the global presence profiles of these two groups of countries: Europe is still dominant in services and investments, despite the spectacular rise of the BRICS, while the latter –mainly China– is dominant in manufactures exports.

Asia, much more than just China and the economy

The pre-eminence of China on the global scene and especially in the economic dimension doesn't mean that this is the only emerging or Asian country with consistent participation in the globalization process, or that the internationalization of the Asian countries is limited to only the economic sphere. Data for the overall region show an upward trend in both the military and soft dimensions of presence. While increasing external presence in Asia's military domain responds mostly to the figures recorded by Japan and China, Asian soft presence is scattered among various countries, with South Korea, Singapore, Thailand, and Malaysia all exhibiting increasing shares of soft presence over the 1990-2014 period.

Foreign policy and the global presence of Australia and South Africa

The Elcano Global Presence Index is also useful as a tool for assessing a county's foreign policy. Are a country's current foreign policies coping with weaknesses in that nation's external projection? Are countries fully exploiting their potential? In the case of Australia, the connection is evident: the shift toward an international economic profile with a liberal accent, in a region that has become the epicentre of global economic activity, explains to some degree the fact that the economic dimension has become the dominant aspect of that country's global presence. As for South Africa, its main strength and basis for exerting regional (or even global) influence has been the relative diversification of its global presence around different economic and soft variables; but that might be now challenged by the increasing presence of Nigeria, a country basing its global presence on exports of energy.

From an input to an output approach to the measurement of countries' presence in terms of information

The current methodology of the index calculates the countries' presence in the area of information using an input approach – recording the installed internet bandwidth. A new methodology could focus instead on the output: to what extent are countries present in the international media? This figure can be calculated taking into account the relative presence of all countries under study among items published through the main wire services, these being an important source of content for the rest of the communication sector. If we applied this criteria, selecting a small number of 'big' but diverse agencies –Agence France Presse, ANSA, Associated Press, Reuters, Deutsche Presse-Agentur, EFE, ITAR-TASS, and Xinhua– we would arrive at a different 2013 information ranking, with the top 5 positions held by the United States, Spain, Germany, China, and the United Kingdom.

1. Slower globalization and a re-concentration of global presence

Iliana Olivié / Manuel Gracia[1]

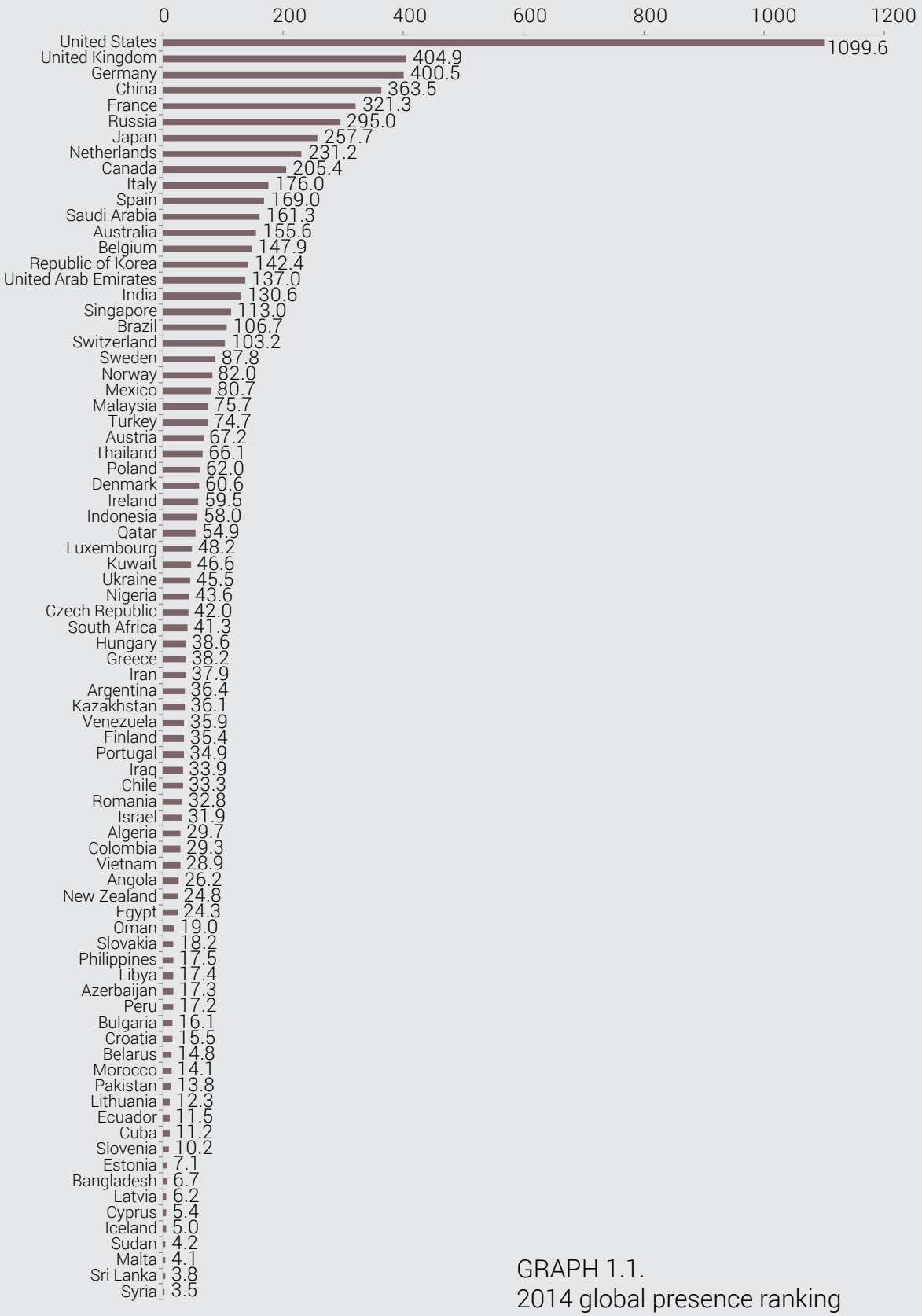
This year's edition of the Elcano Global Presence Index ranks 80 countries according to their external projection. Once again, the United States tops the ranking with an index value of 1,099.6 points. This is followed by the United Kingdom (404.9), Germany (400.5), China (363.5), and France (321.3). Spain ranks 11th , between Italy and Saudi Arabia, with a global presence value of 169.0 (graph 1.1).

Unlike in the previous edition, variations have emerged in the positions held by the top 10 countries. The United Kingdom has climbed one position (from 3rd place to 2nd), and Germany has dropped accordingly (from 2nd in 2013 to 3rd in 2014). While both countries have gained global presence —the United Kingdom rising by 31.8 points, and Germany by 14.3— the United Kingdom's increase in both relative and absolute terms has been higher than that of Germany (table 1.1).

Although there have been no major changes in the positions held by most countries, mild variations might show a change of trend as, in general terms, European countries are strengthening their positions while emerging countries are recording a certain setback. Note, for instance, that Belgium, Poland, Denmark, Ireland, Finland, Romania, Bulgaria, and Croatia gain one position each, Portugal gains two, Greece and Slovakia climb three, Luxembourg 4, and Hungary 5. On the other hand, South Korea, Turkey, Kuwait, and Chile lose one position, Nigeria two, Indonesia and Peru three, Venezuela 4, and Iran 5 (table 1.1).

These results might be surprising, given that previous editions of this report highlight the emergence of the East and the decay of the West in terms of global presence – see, for instance, Olivié and Gracia (2013)[2]. This change of trend responds to different factors. In the first place, European countries record, in general terms, a recovery in the economic variables of external presence, particularly in the fields of manufactures and services. This might mean that, for several cases, the external demand is gaining weight in relation to the domestic market. In parallel, oil-exporting countries are losing global presence in the energy variable; mainly due to the recent evolution of energy prices. This causes a drop of global presence in both absolute and relative terms for Indonesia, Nigeria, Kuwait, or Venezuela. As for Peru and Chile, the lower global presence of these two Latin American countries in 2014 is due to lower levels in the primary goods variable — again, partly as the result of the evolution of commodity prices (table 1.1).

1 Iliana Olivié, senior analyst and Manuel Gracia, research assistant at Elcano Royal Institute.
2 Olivié, Iliana and Manuel Gracia (2013), *Elcano Global Presence Index 2012*, Elcano Royal Institute.



GRAPH 1.1.
2014 global presence ranking

As we will see in chapter 2, the global presence of the European Union in 2014 decreases with respect to 2013. This decrease concentrates in the economic dimension and responds to the lowered value of the euro in relation to the US dollar in December 2013 (with respect to late 2012). If European countries and member states have increased their global presence in 2013-2014 while the European Union as a whole lost global projection outside its boundaries, this may well indicate that member states have increased the intra-Union orientation of their global presence in that same period, leading to an intensification of the European integration process. This should result in an increase of most member states' European presence index, which takes into account their external projection within the perimeter of the Union. And indeed, it does. Table 1.2 shows that most countries record mild increases in European presence. In the case of Germany, this increase is significant – almost 20 points.

Two important exceptions to this general trend are the United Kingdom and the Netherlands. The fact the Germany is increasingly Europe-oriented whereas the United Kingdom is deepening its extra- Union relations might partially explain the latter's climb to 2nd position in the global ranking, and Germany's decline to 3rd. Still, Germany has recovered its 2012 level of global presence — its total external projection was 391.8 in 2012 and 400.5 in 2014.

TABLE 1.1.
2014 global presence ranking and variations since 2013

#	Country	2014 global presence	2013 global presence	Index value variation	Position variation
1	United States	1099.6	1060.1	39.5	=
2	United Kingdom	404.9	373.1	31.8	+1
3	Germany	400.5	386.2	14.3	-1
4	China	363.5	341.4	22.1	=
5	France	321.3	315.2	6.1	=
6	Russia	295.0	290.0	4.9	=
7	Japan	257.7	256.7	1.0	=
8	Netherlands	231.2	213.1	18.0	=
9	Canada	205.4	205.2	0.2	=
10	Italy	176.0	171.8	4.3	=
11	Spain	169.0	164.2	4.8	=
12	Saudi Arabia	161.3	158.3	3.0	=
13	Australia	155.6	157.7	-2.1	=
14	Belgium	147.9	134.3	13.6	+1

#	Country	2014 global presence	2013 global presence	Index value variation	Position variation
15	Republic of Korea	142.4	140.4	1.9	-1
16	United Arab Emirates	137.0	121.2	15.7	=
17	India	130.6	117.0	13.6	=
18	Singapore	113.0	112.5	0.5	=
19	Brazil	106.7	107.2	-0.5	=
20	Switzerland	103.2	100.4	2.9	=
21	Sweden	87.8	86.3	1.5	=
22	Norway	82.0	84.0	-2.0	=
23	Mexico	80.7	79.7	0.9	=
24	Malaysia	75.7	73.5	2.2	+1
25	Turkey	74.7	73.6	1.1	-1
26	Austria	67.2	63.4	3.8	=
27	Thailand	66.1	63.3	2.8	=
28	Poland	62.0	59.4	2.5	+1
29	Denmark	60.6	58.4	2.3	+1
30	Ireland	59.5	55.0	4.5	+1
31	Indonesia	58.0	60.3	-2.3	-3
32	Qatar	54.9	52.9	2.0	=
33	Luxembourg	48.2	44.5	3.7	+4
34	Kuwait	46.6	48.2	-1.7	-1
35	Ukraine	45.5	45.2	0.3	=
36	Nigeria	43.6	47.5	-3.9	-2
37	Czech Republic	42.0	41.3	0.7	-2
38	South Africa	41.3	42.2	-0.9	=
39	Hungary	38.6	36.7	1.9	+5
40	Greece	38.2	36.8	1.4	+3
41	Iran	37.9	44.7	-6.7	-5
42	Argentina	36.4	36.9	-0.5	=
43	Kazakhstan	36.1	38.1	-2.0	-2
44	Venezuela	35.9	39.1	-3.2	-4
45	Finland	35.4	34.1	1.3	+1
46	Portugal	34.9	33.1	1.9	+2
47	Iraq	33.9	35.6	-1.7	-2
48	Chile	33.3	33.3	0.0	-1
49	Romania	32.8	30.7	2.1	+1
50	Israel	31.9	30.3	1.6	+1
51	Algeria	29.7	31.8	-2.1	-2
52	Colombia	29.3	28.6	0.7	=
53	Vietnam	28.9	25.2	3.6	+2

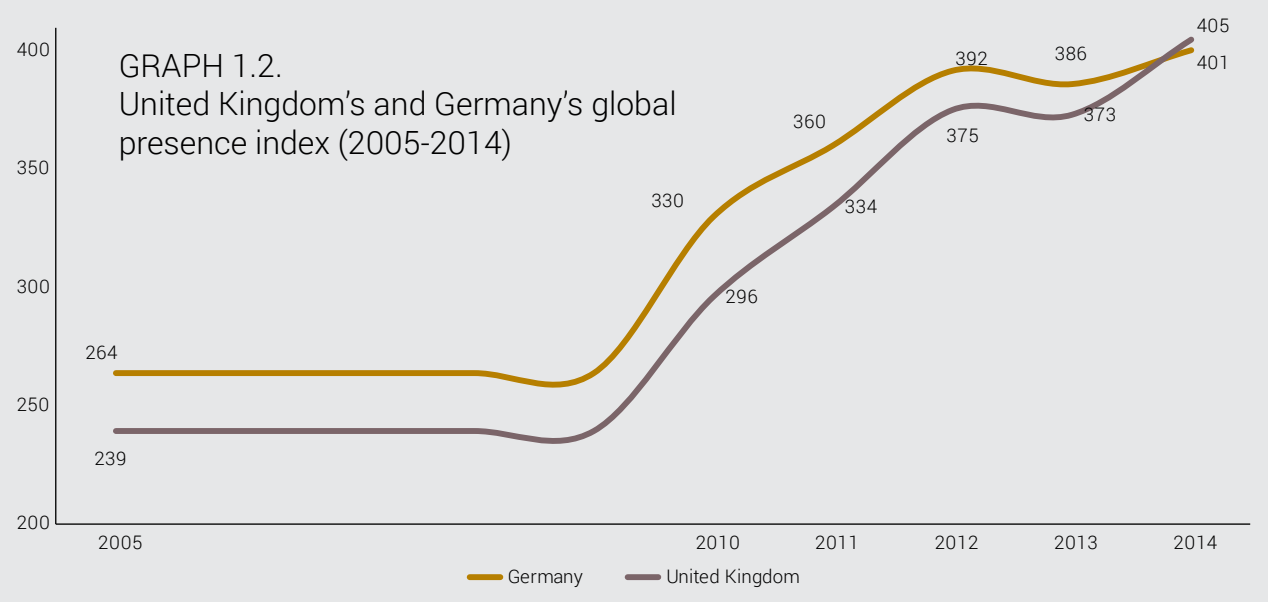
#	Country	2014 global presence	2013 global presence	Index value variation	Position variation
54	Angola	26.2	26.8	-0.6	=
55	New Zealand	24.8	24.3	0.5	+1
56	Egypt	24.3	26.9	-2.7	-3
57	Oman	19.0	18.6	0.4	+1
58	Slovakia	18.2	17.3	0.9	+3
59	Philippines	17.5	16.3	1.2	+4
60	Libya	17.4	23.8	-6.4	-3
61	Azerbaijan	17.3	17.7	-0.4	-1
62	Peru	17.2	18.1	-0.9	-3
63	Bulgaria	16.1	15.4	0.7	+1
64	Croatia	15.5	15.1	0.4	+1
65	Belarus	14.8	16.5	-1.7	-3
66	Morocco	14.1	13.7	0.4	+1
67	Pakistan	13.8	13.9	-0.1	-1
68	Lithuania	12.3	11.6	0.7	=
69	Ecuador	11.5	10.9	0.6	+1
70	Cuba	11.2	11.4	-0.2	-1
71	Slovenia	10.2	10.1	0.1	=
72	Estonia	7.1	6.9	0.1	=
73	Bangladesh	6.7	6.2	0.4	=
74	Latvia	6.2	5.9	0.3	=
75	Cyprus	5.4	5.2	0.2	=
76	Iceland	5.0	4.6	0.4	=
77	Sudan	4.2	3.0	1.2	+3
78	Malta	4.1	4.2	-0.1	-1
79	Sri Lanka	3.8	3.4	0.4	=
80	Syria	3.5	4.0	-0.5	-2

The loss recorded by that country between 2012 and 2013 in economic variables —primary goods, manufactures, services— has recovered, as well as other soft elements such as development cooperation. As for the United Kingdom, the significant 2013-2014 increase of 31.8 points comes due to the strengthening of its relations outside the European Union. The most important contribution to this increase is that of primary goods, which rises by 116%, followed by development cooperation (28.5%), tourism (12%), and investments (over 8%) (graph 1.2). The significant increase of primary goods exports corresponds to the United Kingdom's exports of gold, mainly to Switzerland, in 2013[3]. As this is probably a short-term phenomenon, this upward trend might not continue in future editions of the global presence index.

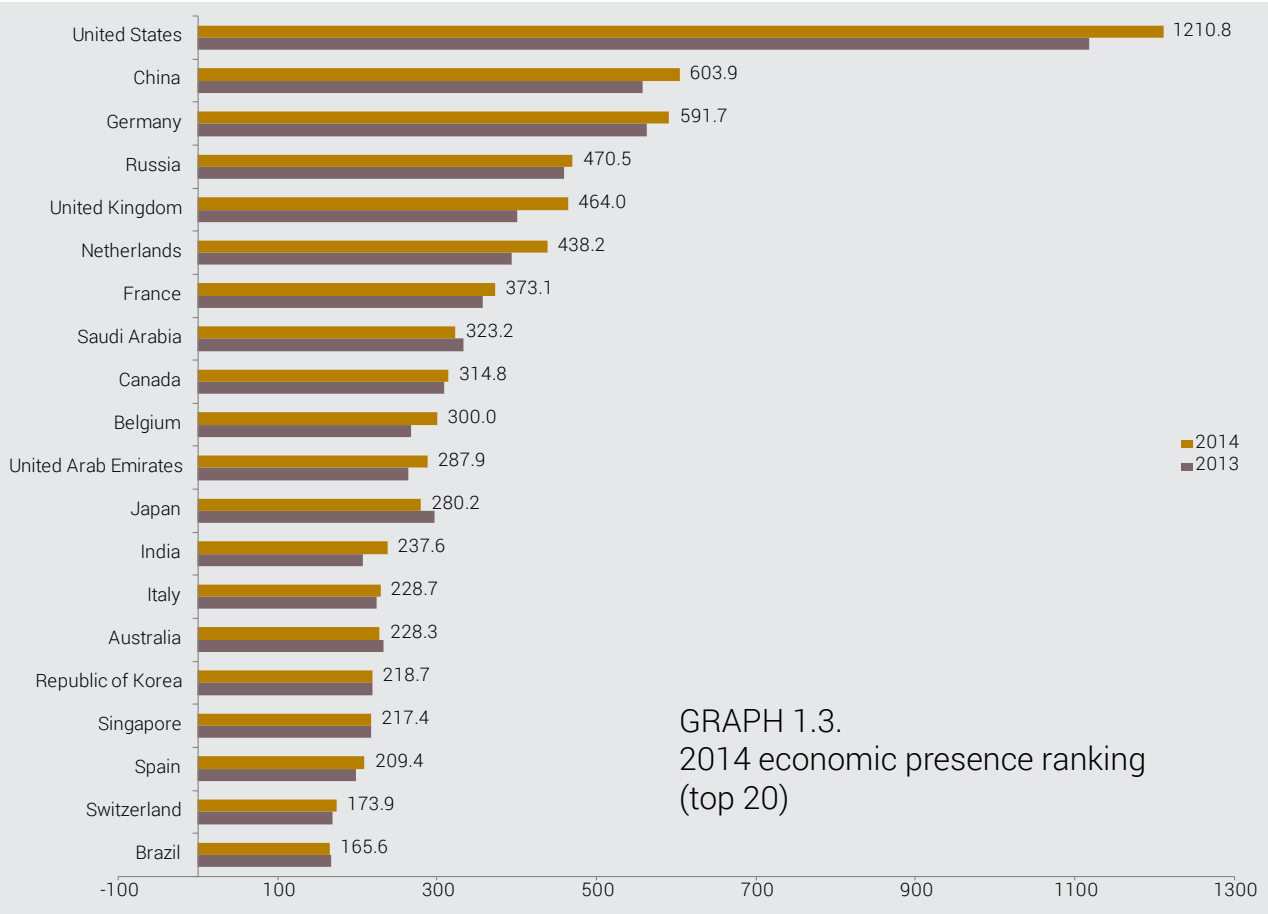
3 'UK gold exports surge tenfold this year', Financial Times, August 19th, 2013
http://www.ft.com/intl/cms/s/0/876af37c-08dd-11e3-ad07-00144feabdc0.html#axzz3RH9dCjPR

TABLE 1.2.
2014 European presence ranking and variations since 2013

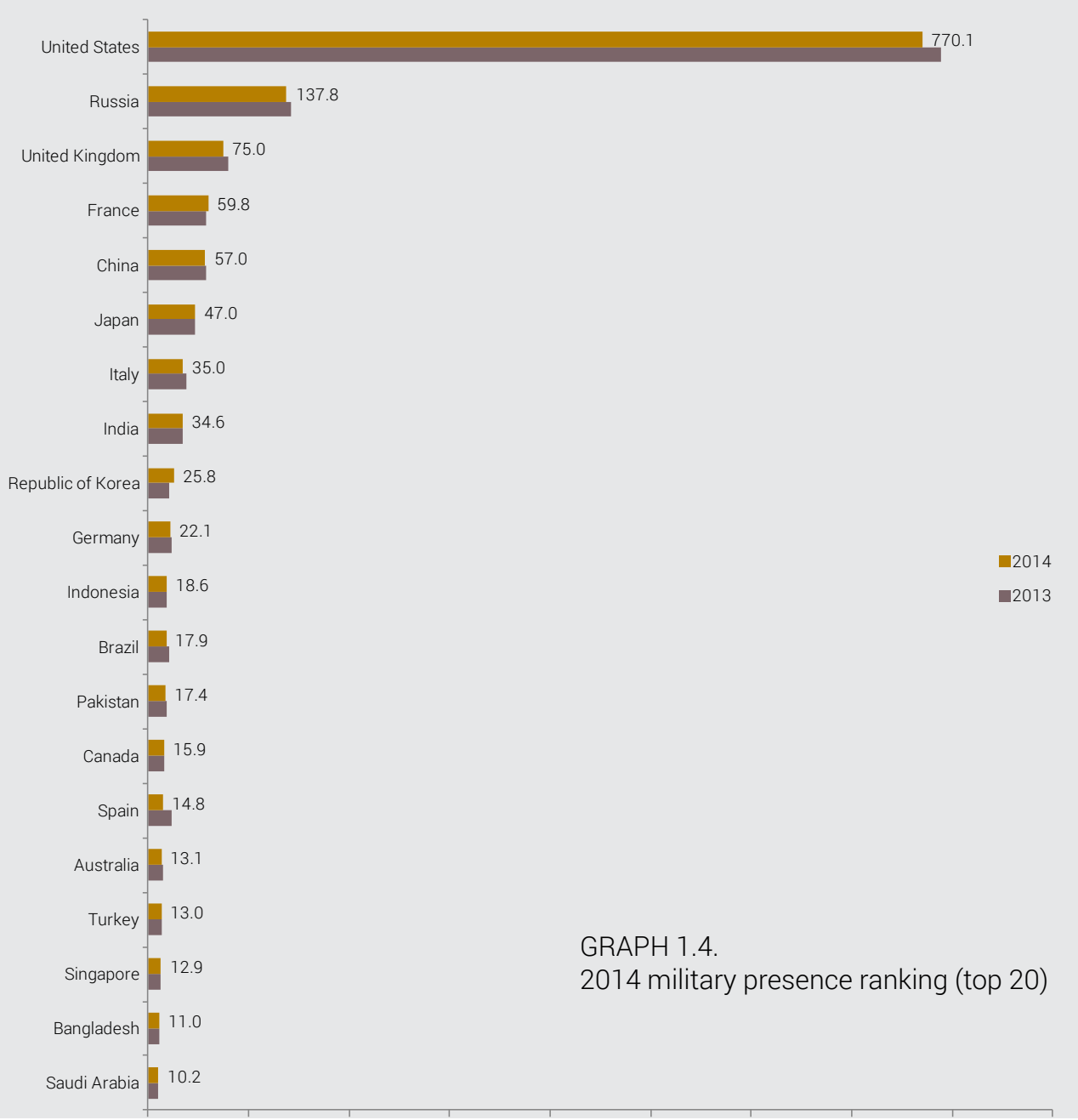
#	Country	2014 european presence	2013 european presence	Index value variation
1	Germany	754.9	735.2	19.7
2	United Kingdom	688.5	700.1	-11.5
3	France	552.3	545.9	6.4
4	Netherlands	467.9	479.8	-11.8
5	Spain	344.9	340.6	4.4
6	Italy	309.3	311.3	-2.1
7	Belgium	302.7	295.1	7.6
8	Luxembourg	187.8	184.8	3.0
9	Sweden	160.7	161.1	-0.4
10	Austria	155.3	152.8	2.5
11	Ireland	125.2	125.0	0.2
12	Poland	120.1	115.0	5.2
13	Denmark	113.7	113.4	0.3
14	Czech Republic	91.7	91.8	-0.1
15	Hungary	86.5	86.9	-0.4
16	Greece	72.9	70.6	2.3
17	Portugal	69.6	65.7	3.9
18	Finland	68.1	64.5	3.6
19	Romania	47.6	42.9	4.7
20	Slovakia	37.0	36.2	0.8
21	Croatia	34.6	31.5	3.0
22	Slovenia	23.5	23.3	0.2
23	Bulgaria	23.0	22.5	0.5
24	Lithuania	21.7	22.1	-0.4
25	Estonia	14.1	13.8	0.3
26	Cyprus	10.9	10.7	0.2
27	Latvia	10.7	10.0	0.7
28	Malta	7.6	7.6	0.0



By dimensions, the top 20 ranking for economic presence in 2014 shows important variations with respect to 2013. India surpasses Singapore, and Italy leaves Australia behind, as does Belgium with Japan; China climbs one position to be ranked 2nd, leaving Germany in the 3rd position (graph 1.3).

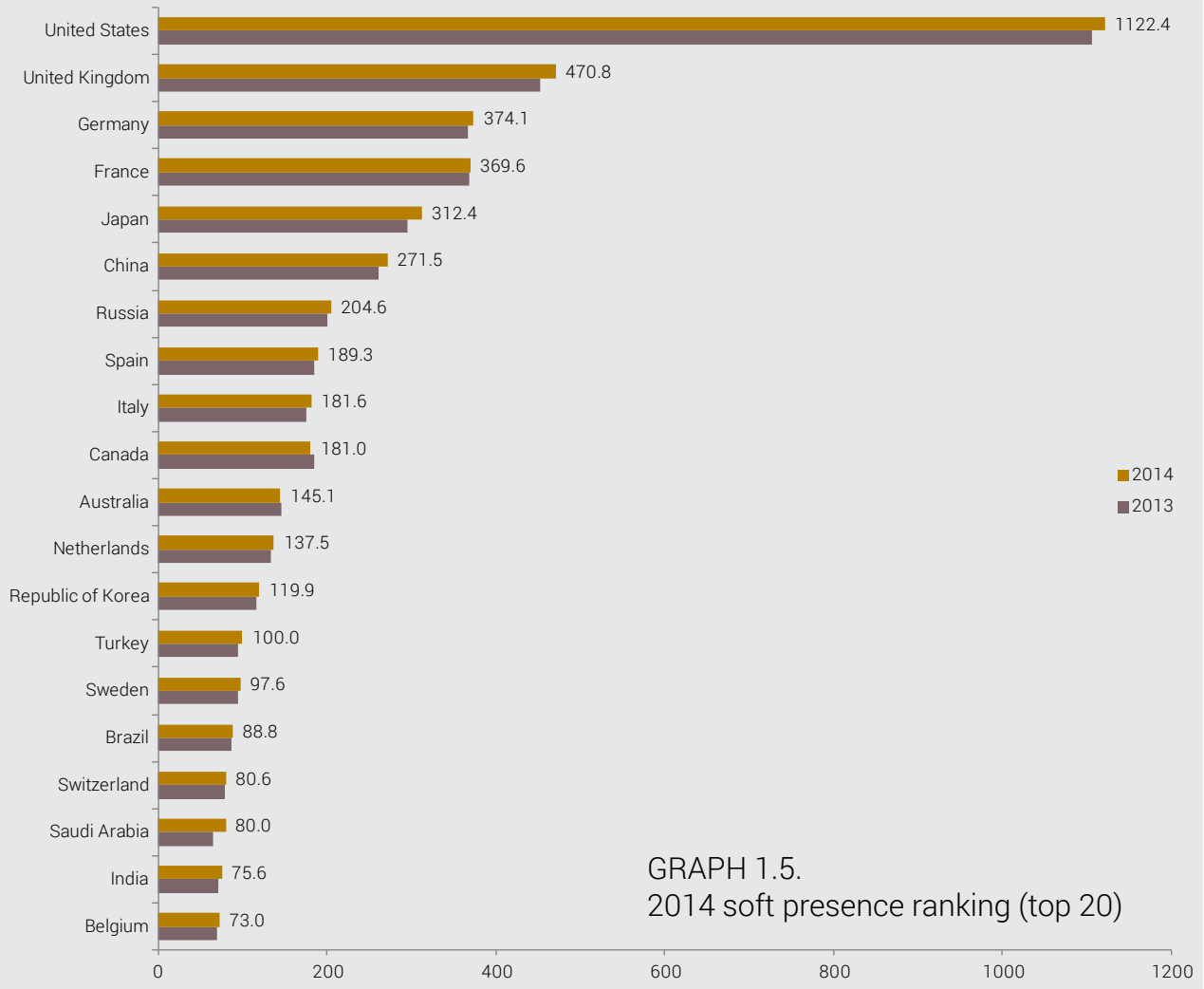


The most significant change in the top 20 ranking of military presence is the drawback of Spain, which falls from the 9th position in 2013 to 15th in 2014. At the same time, Brazil falls one position while South Korea and Indonesia climb by three and two, respectively — a result that might confirm the militarization process of certain East Asian countries (graph 1.4).



GRAPH 1.4.
2014 military presence ranking (top 20)

Finally, in terms of the soft dimension, it should be noted that Germany, Spain, Italy, and Turkey all climb one position and Saudi Arabia two within the top 20 ranking by index value, while France, Belgium, and India lose one rank and Canada two (graph 1.5).

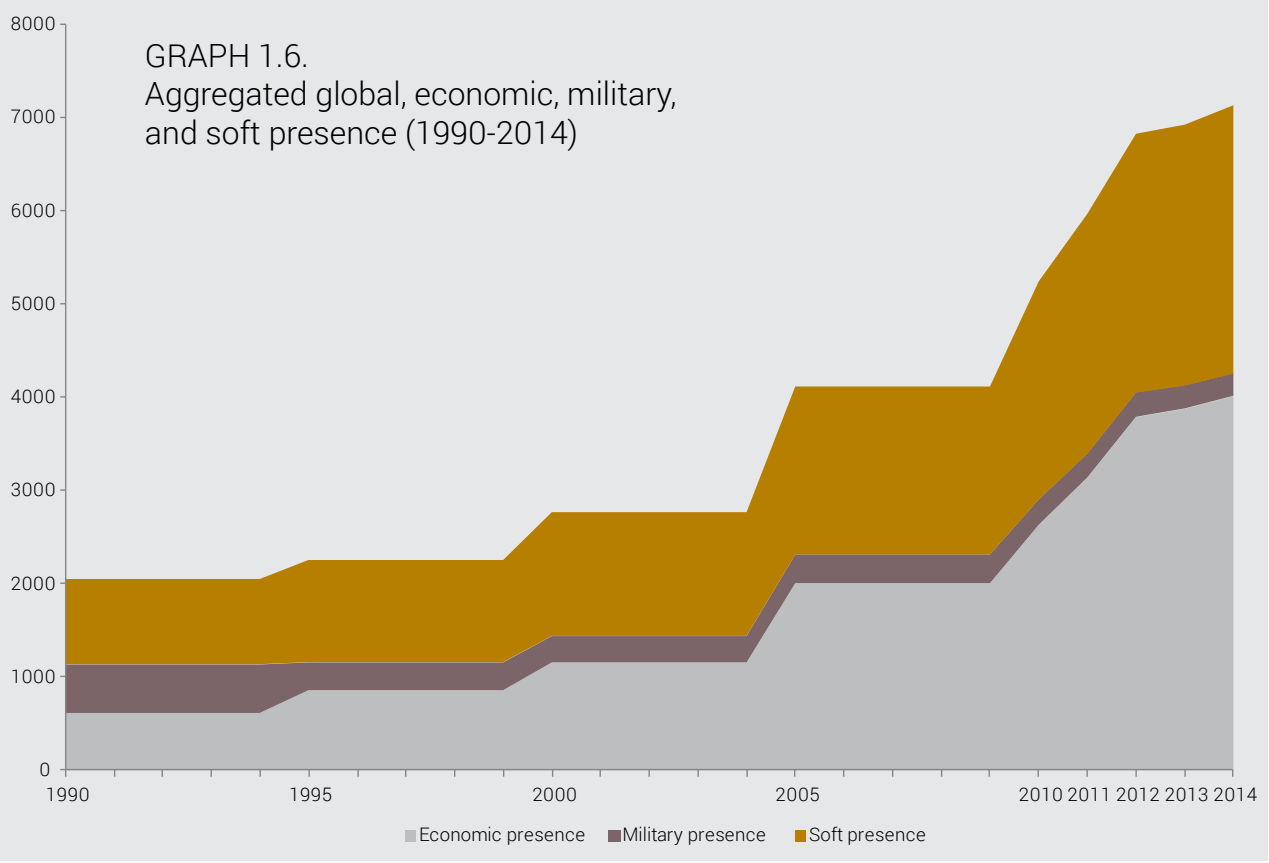


GRAPH 1.5.
2014 soft presence ranking (top 20)

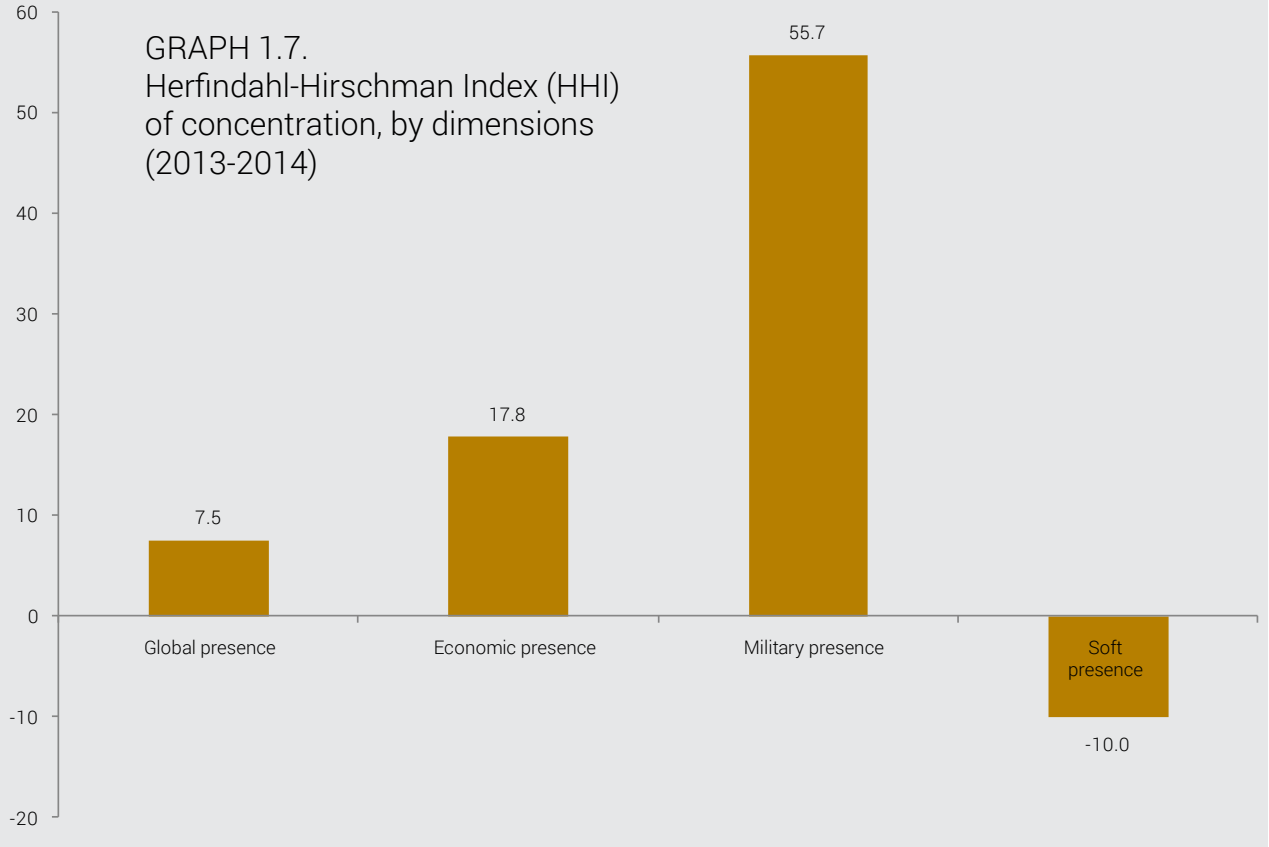
Last year's edition showed a deceleration of the globalization process (Olivié *et al.*, 2014)[3]. Although 2014 data point to a mild recovery, the increase of the aggregated global presence of all 80 countries remains significantly lower than the growth rates recorded in previous periods (graph 1.6). Likewise, the stagnation of the globalization process might relate to a re-concentration of global presence (and of some of its dimensions) into a smaller number of countries. In fact, the re-concentration between 2013 and 2014 is stronger than that of the 2012-2013 period, as it affects not only economic presence but also military presence[4] and, as a result, total projection. This is shown by the Herfindahl-Hirschman Index (HHI) of concentration which increases to 7.5 for global presence in the last period. Currently, the only dimension continuing to trend toward de-concentration is soft presence, with an HHI score of -10 (graph 1.7). Despite these recent results, and given the intense degree of de-concentration seen in the early part of this decade, there appears to be, on average, a wider dispersion of both the economic and soft dimensions in the 2010-2014 period, although in the case of the economic presence this dispersion is much less intense than in previous periods (graph 1.8).

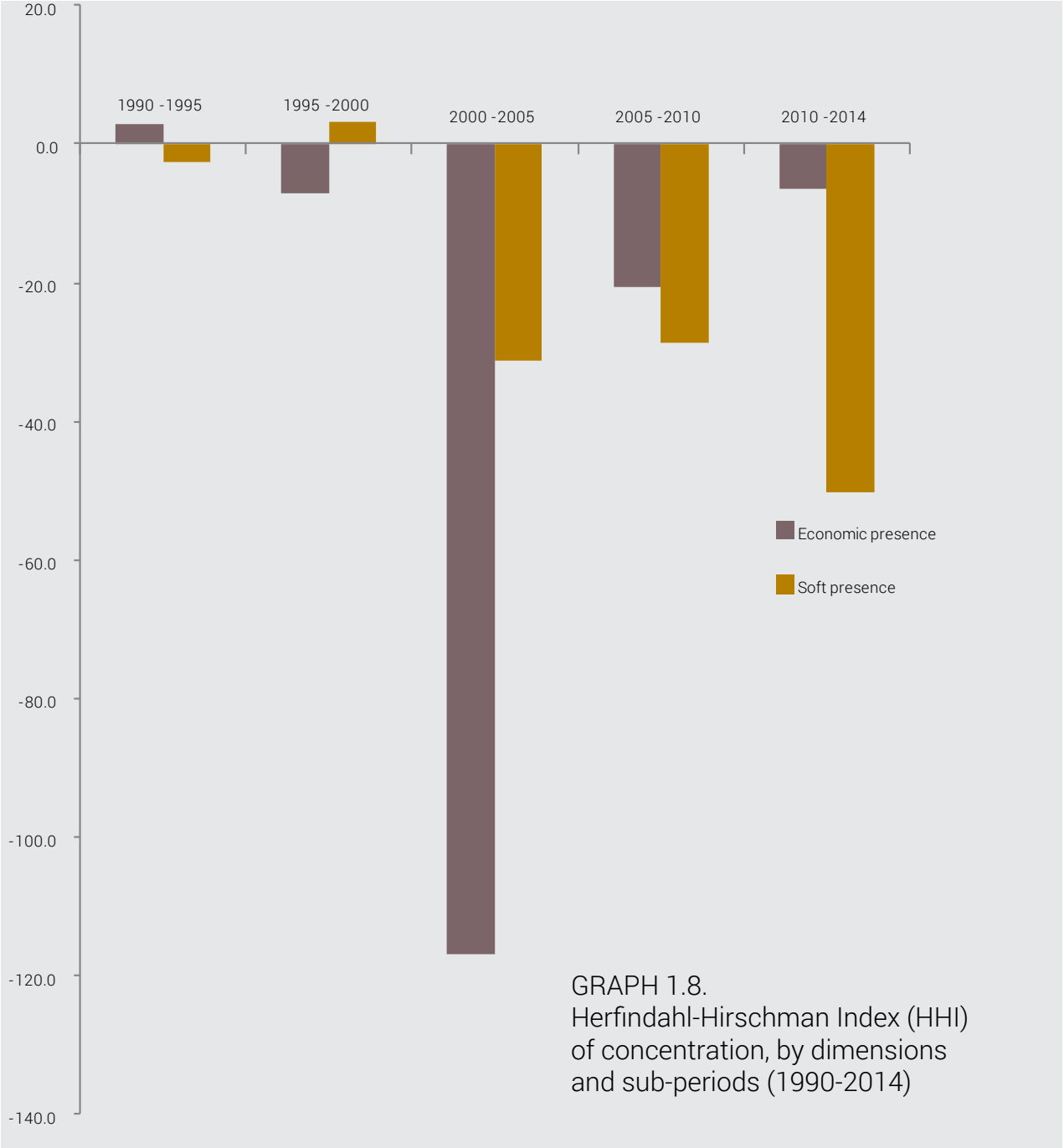
3 Olivié, Iliana; Manuel Gracia and Carola García-Calvo (2014), *Elcano Global Presence Report 2014,* Elcano Royal Institute.
4 It should be noted that a de-concentration of military presence occurred last year. This change of trend comes mainly due to the fact that many countries have followed the United States in the repatriation of troops, leading to a recovery of the United States' historically high share of military presence.

GRAPH 1.6.
Aggregated global, economic, military, and soft presence (1990-2014)



GRAPH 1.7.
Herfindahl-Hirschman Index (HHI) of concentration, by dimensions (2013-2014)





GRAPH 1.8.
Herfindahl-Hirschman Index (HHI) of concentration, by dimensions and sub-periods (1990-2014)

2. From global to local: the architecture of the European Union's external projection

Iliana Olivié / Manuel Gracia[1]

Previous analyses by Elcano Royal Institute (Molina (coord.) 2014)[2] emphasize the link between the domestic sphere of a country's economic, political, and social systems and its international projection, as well as the relationship between internal and foreign policies.

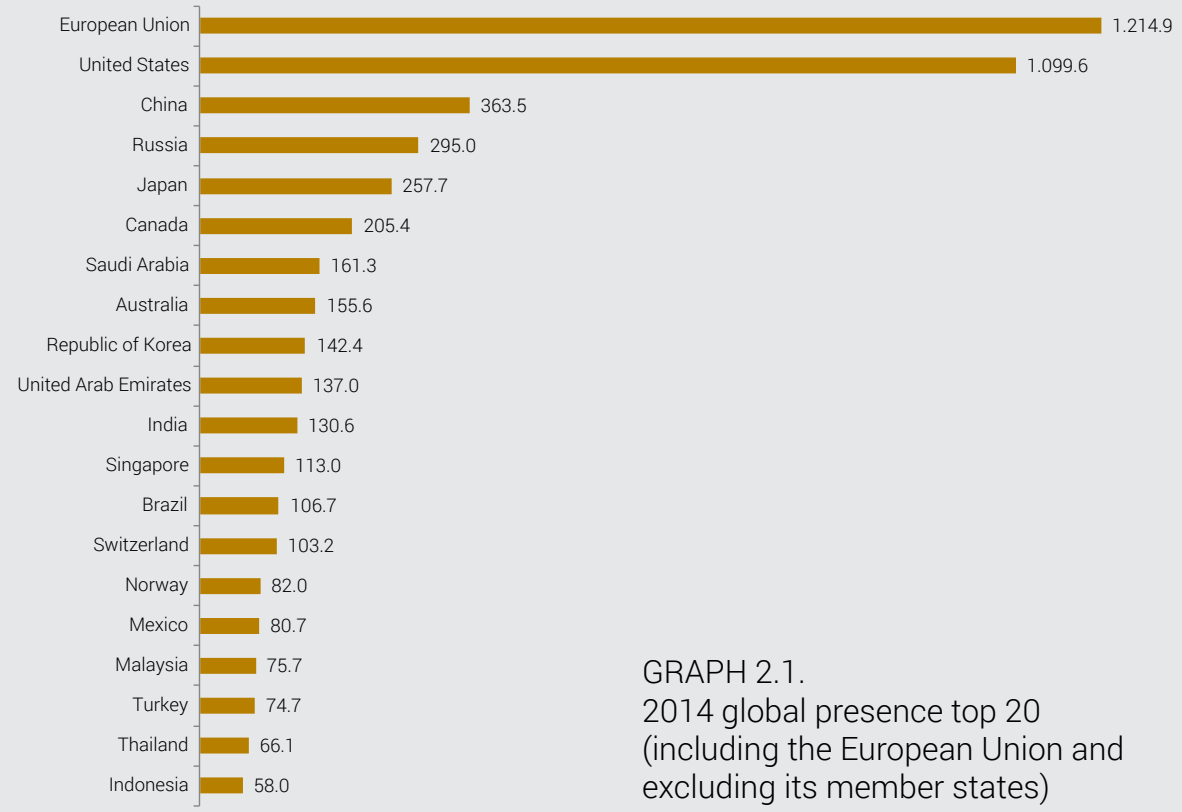
One way to assess the extent and shape of this complex link is by means of the Elcano Global Presence Index. This is true because synthetic indexes, such as the global presence index of the European Union overall, can be disaggregated, both from a sector approach (analysing the relative contribution of economic, military, or soft dimensions and variables) and with a geographical focus (taking into account the relative contribution of each member state to the Union's total projection). As for each member state, both their own global and European presence and their contribution to the global presence of the European Union come as the result of the external projection of their regions and communities.

The aim of this section is to understand the global-local nexus, exemplified in the case of the European Union; the relative contribution of member states to the Union's global presence; and the geographical and sector composition of one particular European country, namely Spain.

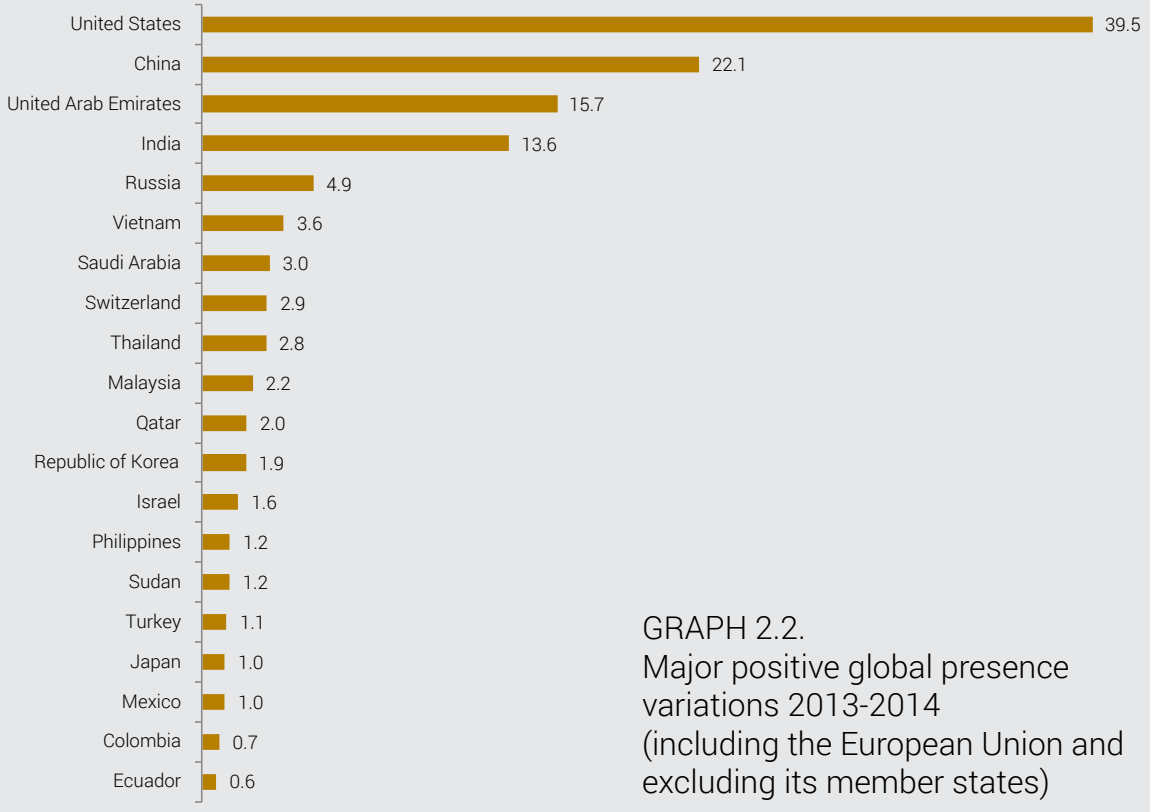
The European Union leads the global presence ranking (for now)

In this edition as in previous, the European Union remains the political unit with the highest global presence. The total external projection of European Union member states outside the Union's boundaries amounts to 1,214.9 in 2014 (graph 2.1). By this measure, the European Union has recorded a decrease (of 4.9 points) in global presence over the last year, as its global presence index amounted to 1,219.8 in 2013. This 0.4% decrease might not seem especially important, but it is in fact the 3rd sharpest drop recorded by any country or territory during the past year. Iran tops this particular ranking with a decrease of 6.7 points, followed by Libya, which records a drop of 6.4 points (graph 2.3).

1 Iliana Olivié, senior analyst and Manuel Gracia, research assistant at Elcano Royal Institute
2 Molina, Ignacio (coord.) (2014), 'Hacia una renovación estratégica de la política exterior española', *Informes Elcano 15*, Elcano Royal Institute.

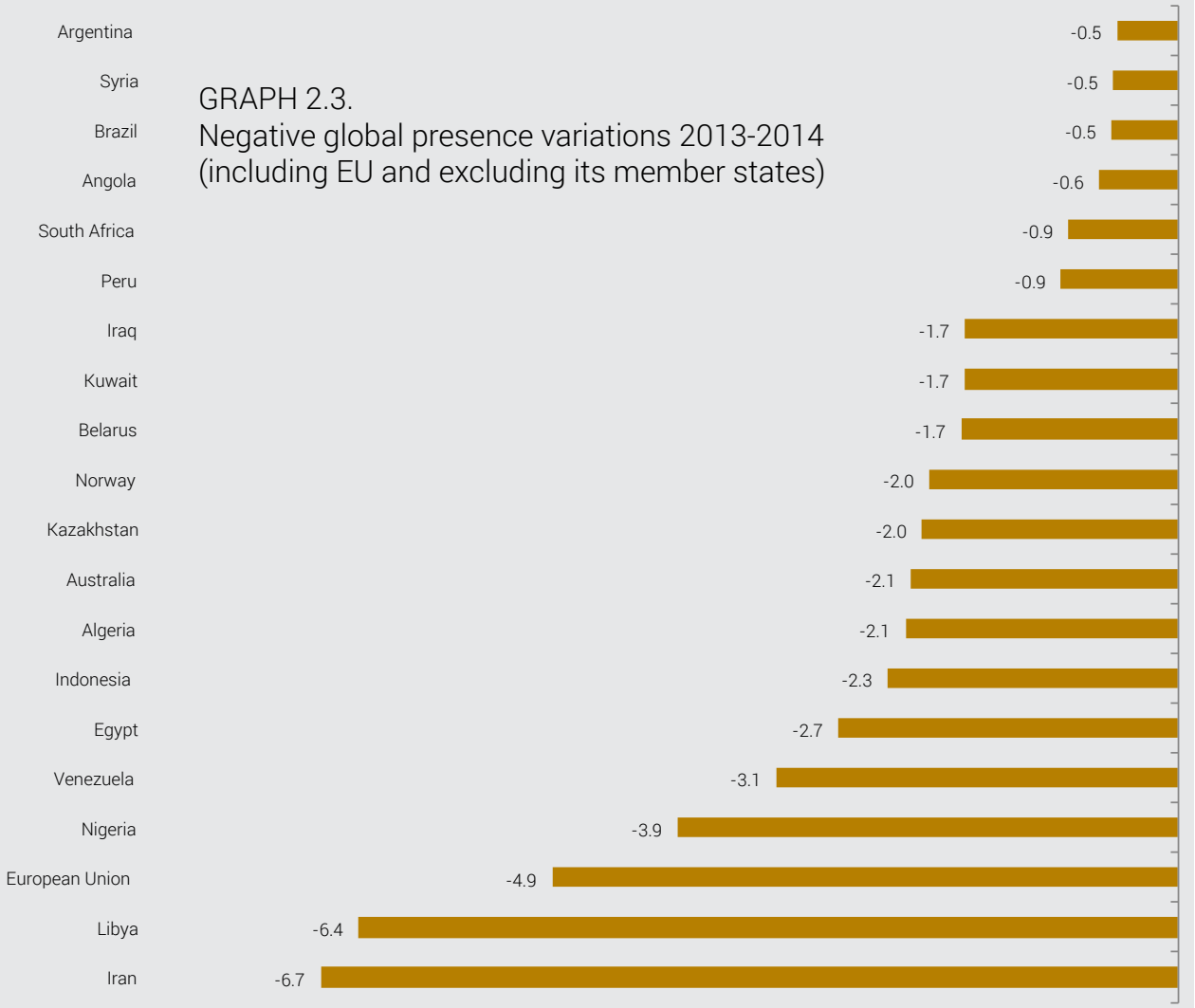


GRAPH 2.1.
2014 global presence top 20 (including the European Union and excluding its member states)

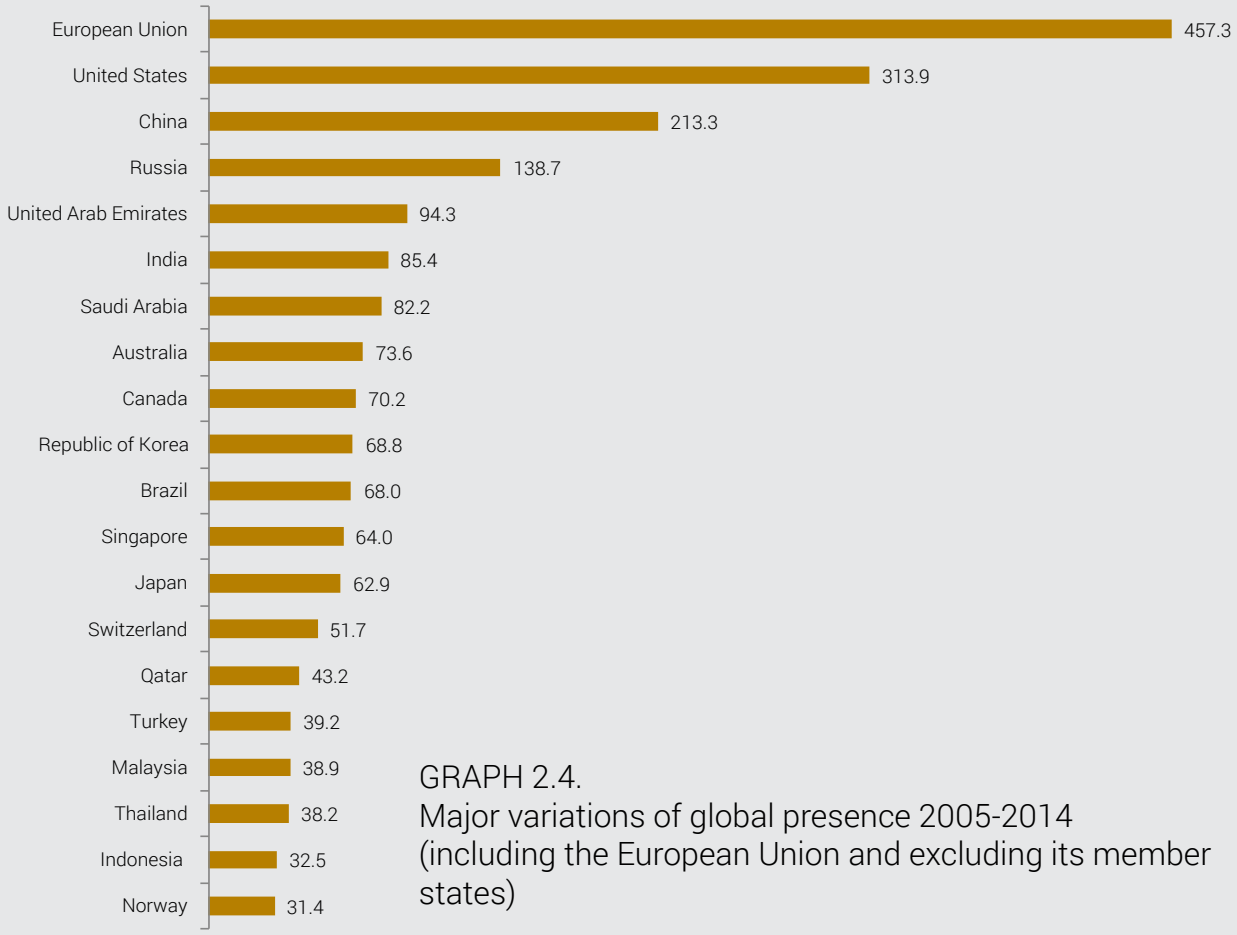


GRAPH 2.2.
Major positive global presence variations 2013-2014 (including the European Union and excluding its member states)

GRAPH 2.3.
Negative global presence variations 2013-2014
(including EU and excluding its member states)



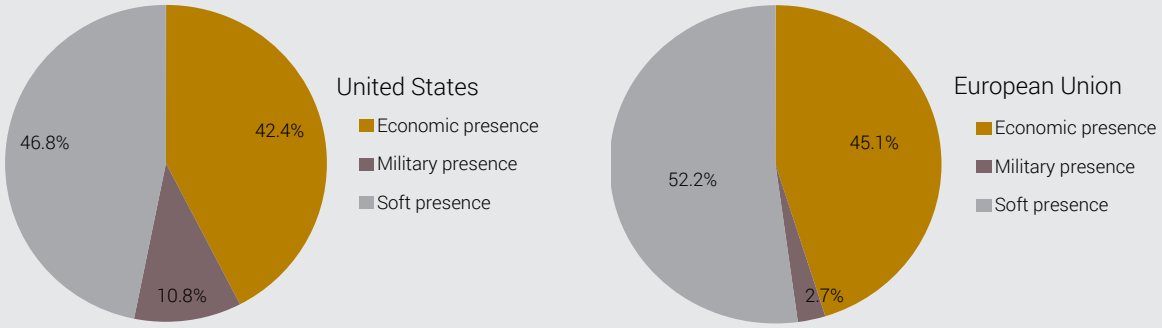
This trend contrasts with that of other countries, including the United States (whose global presence increased by 39.5 points between 2013 and 2014), China (rising 22.1 points), and other emerging economies and middle or regional powers such as United Arab Emirates (15.7 points), India (13.6), Russia (4.9), Vietnam (3.6), or Saudi Arabia (3.0) (graph 2.2). The global presence gap between the European Union and the United States has decreased from 159.7 points in 2013 to 115.0. This is due to a large extent to dollar-euro exchange rate variations, with the euro recording a lower value in 2013 with respect to 2012. This movement has a negative impact on Eurozone countries as well as on countries with national currencies pegged to the euro. However, it should be noted that the European Union is the territory that has recorded the highest increase of total global presence since 2005, the first year for which we calculate European external projection. During the 2005-2014 period, the European Union's global presence has increased by 457 points, compared to 314 points in the case of the United States and 213 for China (graph 2.4).



GRAPH 2.4.
Major variations of global presence 2005-2014 (including the European Union and excluding its member states)

As for the features of the European Union's global presence, as pointed out previously (Olivié *et al.*, 2014)[3], it is mostly based on the soft dimension (which account for 52% of total global presence) and economic variables (45%). Military presence accounts for less than 3% of European external projection. These figures contrast with the United States' global presence composition; despite the decrease in military variables in the 2012-2013 period, this dimension still represents over 10% of the country's total presence. As with the European Union, the most significant dimension for the United States is soft presence, followed by economic (graph 2.5).

GRAPH 2.5.
United States and European Union 2014 global presence by dimension



3 Olivié Iliana, Manuel Gracia and Carola García-Calvo (2014), *Elcano Global Presence Report 2014*, Elcano Royal Institute.

How is that presence built? The relative contribution of member states to the Union's external projection

Besides its sector composition, the European Union's global presence can be analysed geographically. It is possible to calculate to what extent each of the 28 member states contribute to total external projection of the whole territory. Data for 2014 show that the United Kingdom is the main contributor to European global projection, followed by Germany, France, Italy, the Netherlands, and Spain. The three top countries account for over 51% of European global presence (table 2.1). This ranking has not recorded major changes over the last decade. Actually, the top 9 spots in 2014 continue to be held by the same countries –in the same positions– as in 2005.

TABLE 2.1.
European Union 2014 global presence by member state (in %)

#	Country	Contribution	#	Country	Contribution
1	United Kingdom	19.8%	15	Finland	1.4%
2	Germany	16.9%	16	Portugal	1.2%
3	France	14.7%	17	Romania	1.2%
4	Italy	7.5%	18	Czech Republic	1.1%
5	Netherlands	6.9%	19	Luxembourg	0.7%
6	Spain	6.6%	20	Croatia	0.6%
7	Belgium	3.5%	21	Bulgaria	0.6%
8	Sweden	3.5%	22	Slovakia	0.5%
9	Denmark	2.5%	23	Lithuania	0.5%
10	Poland	2.2%	24	Slovenia	0.4%
11	Ireland	2.2%	25	Latvia	0.4%
12	Austria	1.8%	26	Estonia	0.3%
13	Greece	1.4%	27	Cyprus	0.2%
14	Hungary	1.4%	28	Malta	0.2%

Although the United Kingdom has been strengthening its position since 2005, with an increase of 0.7 points in its contribution to the European Union's global presence, other major member states record the opposite trend. Noteworthy are the two countries whose contribution decreased most in the 2005-2014 period: Germany (by 1.9 points) and France (1.2) (table 2.2).[4]

The ranking of economic contributions of member states to the European Union's global presence shows a similar picture. Five big economies top the ranking: the United Kingdom (9.3% of global presence), Germany (7.8%), France (5.4%), the Netherlands (4.2%), and Italy (3.2%) (table 2.3). Moreover, the first three contributors account for approximately half of the aggregated economic contribution to global presence. This might also reflect their capacity to reorient their exports outside the European Union in a period of financial and economic crisis.

4 It should be noted that the significant increases recorded by Romania, Bulgaria, and Croatia are due to the fact that these countries were not part of the European Union in 2005. Therefore, starting from 0 in 2005, the increase equals the index value in 2014.

TABLE 2.2.
Variations in contributions to the European Union's global presence by member states (2005-2014, percentual points)

#	Country	Contribution	#	Country	Contribution
1	Romania	1.2%	15	Netherlands	0.0%
2	United Kingdom	0.7%	16	Estonia	0.0%
3	Croatia	0.6%	17	Malta	0.0%
4	Bulgaria	0.6%	18	Sweden	0.0%
5	Ireland	0.6%	19	Slovakia	0.0%
6	Poland	0.4%	20	Belgium	-0.1%
7	Spain	0.4%	21	Finland	-0.2%
8	Luxembourg	0.3%	22	Latvia	-0.2%
9	Portugal	0.2%	23	Italy	-0.2%
10	Lithuania	0.1%	24	Hungary	-0.2%
11	Czech Republic	0.1%	25	Austria	-0.3%
12	Cyprus	0.0%	26	Greece	-0.5%
13	Denmark	0.0%	27	France	-1.2%
14	Slovenia	0.0%	28	Germany	-1.9%

TABLE 2.3.
Economic contributions of member states to the European Union's 2014 global presence (in %)

#	Country	Contribution	#	Country	Contribution
1	United Kingdom	9.3%	15	Luxembourg	0.4%
2	Germany	7.8%	16	Portugal	0.4%
3	France	5.4%	17	Hungary	0.3%
4	Netherlands	4.2%	18	Romania	0.3%
5	Italy	3.2%	19	Czech Republic	0.3%
6	Spain	2.9%	20	Bulgaria	0.2%
7	Belgium	2.3%	21	Lithuania	0.2%
8	Sweden	1.5%	22	Croatia	0.1%
9	Ireland	1.5%	23	Slovenia	0.1%
10	Denmark	1.2%	24	Slovakia	0.1%
11	Austria	0.8%	25	Latvia	0.1%
12	Greece	0.7%	26	Estonia	0.1%
13	Poland	0.6%	27	Cyprus	0.1%
14	Finland	0.6%	28	Malta	0.0%

However, the evolution of economic contributions to global presence has been different from that of global contributions. Firstly, most countries have increased their economic contribution to global presence –meaning an increased importance of the economic dimension in the external projection of the European Union. In fact, all member states but Finland have increased their contribution in the 2005-2014 period (table 2.4). Secondly, the most important variations are those of bigger –economically, demographically– member states. The United Kingdom, Spain, Germany, the Netherlands, and Ireland top that ranking (table 2.4).

Military contributions reflect a similar picture. France (with a military contribution of 0.7% of the European Union's global presence), the United Kingdom (0.6%), Italy (0.4%), Germany (0.3%), and Spain (0.2%) top the ranking. As usual, the military dimension shows a higher degree of concentration in a few member states. France, the United Kingdom, and Italy account for 1.7% of the aggregated 2.7% military contribution by all 28 member states to the European Union's total external projection (table 2.5).

TABLE 2.4.
Variations in economic contributions by member states to the European Union's global presence (2005-2014, percentual points)

#	Country	Contribution	#	Country	Contribution
1	United Kingdom	1.4	15	Greece	0.1
2	Spain	1.0	16	Lithuania	0.1
3	Germany	0.9	17	Austria	0.1
4	Netherlands	0.9	18	Sweden	0.1
5	Ireland	0.6	19	Latvia	0.0
6	France	0.5	20	Czech Republic	0.0
7	Italy	0.4	21	Hungary	0.0
8	Romania	0.3	22	Estonia	0.0
9	Bulgaria	0.2	23	Slovakia	0.0
10	Poland	0.2	24	Malta	0.0
11	Denmark	0.2	25	Cyprus	0.0
12	Portugal	0.1	26	Belgium	0.0
13	Luxembourg	0.1	27	Slovenia	0.0
14	Croatia	0.1	28	Finland	-0.1

TABLE 2.5.
Military contributions of member states to the European Union's 2014 global presence (in %)

#	Country	Contribution	#	Country	Contribution
1	France	0.7%	15	Austria	0.0%
2	United Kingdom	0.6%	16	Ireland	0.0%
3	Italy	0.4%	17	Sweden	0.0%
4	Germany	0.3%	18	Slovenia	0.0%
5	Spain	0.2%	19	Slovakia	0.0%
6	Netherlands	0.1%	20	Finland	0.0%
7	Latvia	0.1%	21	Hungary	0.0%
8	Greece	0.1%	22	Lithuania	0.0%
9	Rumania	0.1%	23	Luxembourg	0.0%
10	Poland	0.0%	24	Croatia	0.0%
11	Denmark	0.0%	25	Estonia	0.0%
12	Portugal	0.0%	26	Czech Republic	0.0%
13	Bulgaria	0.0%	27	Malta	0.0%
14	Belgium	0.0%	28	Cyprus	0.0%

Again, the soft dimension ranking holds a strong parallelism with both global and economic contributions to the European Union's global presence. The top 4 countries are the same. The United Kingdom's soft dimension accounts for 9.9% of total European Union external projection. Germany is in 2nd place (8.8%), followed by France (8.5%), and Italy (3.9%). Spain holds the 5th position. It should be noted that Spain is the 8th global contributor to the European Union's global presence index (table 2.1), reflecting the soft profile of the country – a feature that has been highlighted in previous reports (Olivié *et al.*, 2013 and 2014). Again, the top three countries account for over half the contributions of all member states (table 2.6).

As a result, 49.7% of European Union global presence can be ascribed to British, German, and French economic and soft projection outside the European boundaries. Therefore, those three countries are key to the European Union's role as a global actor. The importance of these three countries is also evident in graph 2.6, which plots major contributions to the European Union's global presence by variables and by country.

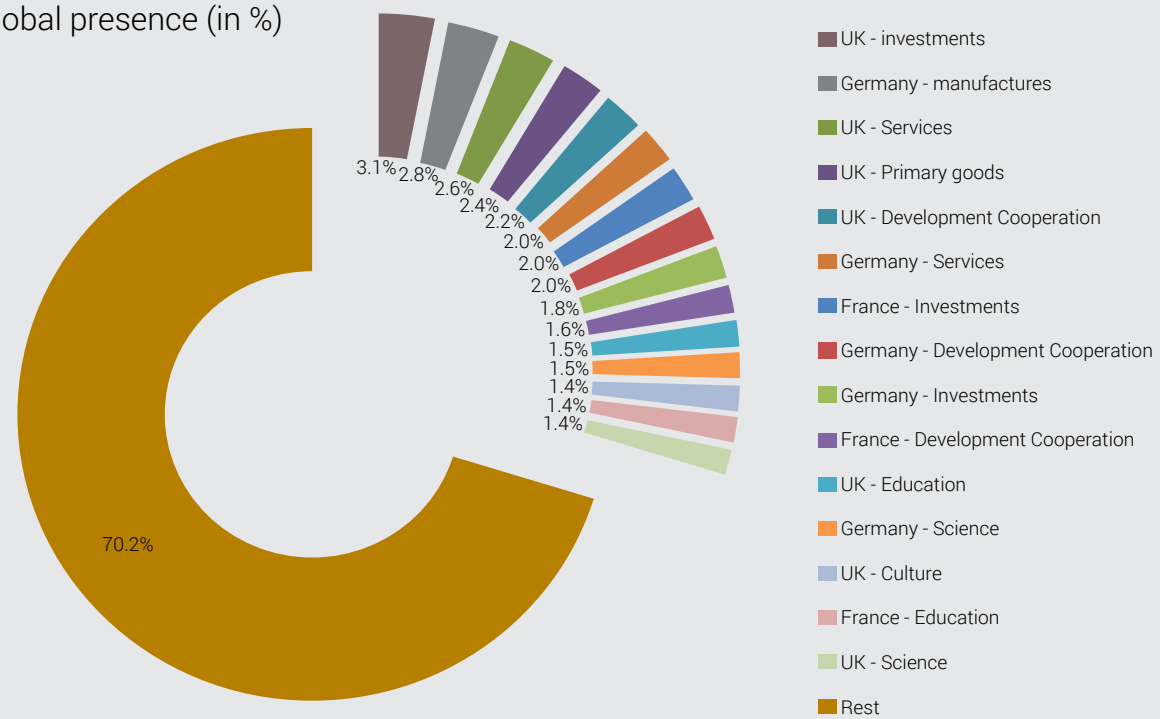
TABLE 2.6.
Soft contributions of member states to the European Union's 2014 global presence (in %)

#	Country	Contribution		Country	Contribution
1	United Kingdom	9.9%	15	Finland	0.8%
2	Germany	8.8%	16	Portugal	0.7%
3	France	8.5%	17	Greece	0.7%
4	Italy	3.9%	18	Ireland	0.6%
5	Spain	3.5%	19	Croatia	0.5%
6	Netherlands	2.6%	20	Slovakia	0.4%
7	Sweden	1.9%	21	Bulgaria	0.3%
8	Poland	1.5%	22	Luxembourg	0.3%
9	Denmark	1.2%	23	Slovenia	0.3%
10	Belgium	1.2%	24	Lithuania	0.3%
11	Hungary	1.1%	25	Estonia	0.2%
12	Austria	1.0%	26	Latvia	0.2%
13	Czech Republic	0.8%	27	Malta	0.2%
14	Romania	0.8%	28	Cyprus	0.2%

TABLE 2.7.
Variations in soft contributions by member states to the European Union's global presence (2005-2014, percentual points)

#	Country	Contribution		Country	Contribution
1	Romania	0.8%	15	Malta	-0.1%
2	United Kingdom	0.5%	16	Slovakia	-0.1%
3	Croatia	0.5%	17	Finland	-0.1%
4	Bulgaria	0.3%	18	Sweden	-0.1%
5	Poland	0.2%	19	Latvia	-0.1%
6	Luxembourg	0.1%	20	Denmark	-0.2%
7	Czech Republic	0.1%	21	Hungary	-0.2%
8	Portugal	0.1%	22	Spain	-0.4%
9	Ireland	0.0%	23	Austria	-0.4%
10	Lithuania	0.0%	24	Greece	-0.5%
11	Cyprus	0.0%	25	Italy	-0.6%
12	Slovenia	0.0%	26	Netherlands	-0.8%
13	Belgium	0.0%	27	France	-0.9%
14	Estonia	-0.1%	28	Germany	-2.6%

GRAPH 2.6.
Contributions by member states and variables to the European Union's 2014 global presence (in %)



Europe by regions. The contribution of autonomous communities to Spain's global presence

For countries with regionally disaggregated statistical information –such as Germany, the United States, the United Kingdom, or Spain– it is possible to calculate the contribution of sub-national regions (autonomous communities in the case of Spain) to the aggregate global presence of the country in question.

As shown in previous analyses (Olivié and Gracia, 2014)[4], since 1990, Spain's global presence has recorded a rapid increase in relative terms, well above that of other countries such as the United States or Portugal. However, a detailed analysis shows weaknesses and disequilibria in the features of this projection – concentration in tourism or sports, and lower contributions of technology or education to aggregated presence. In analysing Spain's global presence with a geographical approach, we may arrive at a regional profile of these strengths and weaknesses.

The autonomous community that contributes most to Spain's global presence is Catalonia, with a share of almost 22% of Spanish global presence. This is followed by Madrid, Andalusia, Valencia, and the Basque country. Those 5 communities account for almost 70% of Spain's total presence. At the other extreme, the 5 communities that contribute the least are the non-contiguous cities of Melilla and Ceuta as well as la Rioja, Extremadura, and Navarre (table 2.8).

4 Olivié, Iliana and Manuel Gracia (2014), 'La inserción exterior de España requiere una redefinición estratégica' *Estrategia Exterior Española* 1/2014, February.

As with the global presence of countries, there seems to be a strong correlation between the size of a territory (autonomous community, country, group of countries) in geographic, demographic, and/or economic terms and its capacity to project itself outside its boundaries. In general terms, the contribution of each autonomous community to Spain's global presence is aligned with its contribution to total GDP (table 2.8).

TABLE 2.8.
Ranking of contributions by autonomous communities to Spain's 2014 global presence (in %)

Autonomous community	% Spain's global presence	% GDP
Catalonia	21.59%	18.9%
Madrid	19.50%	18.0%
Andalusia	12.87%	13.5%
Valencia	8.95%	9.5%
Basque Country	5.95%	6.2%
Canaries	5.70%	3.8%
Galicia	4.92%	5.4%
Baleares	4.70%	2.6%
Castille and Leon	2.99%	5.2%
Murcia	2.86%	2.6%
Aragon	1.95%	3.2%
Cantabria	1.85%	1.2%
Castille-La Mancha	1.79%	3.5%
Asturias	1.65%	2.1%
Navarre	1.35%	1.7%
Extremadura	0.86%	1.6%
Rioja	0.43%	0.8%
Melilla	0.04%	0.1%
Ceuta	0.04%	0.1%

However, some communities are more outward-oriented, as their contribution to national global presence is higher than their share of national GDP. This is the case for Catalonia, Madrid, the Canary islands, the Balearic islands, Murcia, and Cantabria. In some cases, like the Basque country, the share of global presence is only slightly higher than the share of GDP. In others, the participation in the country's global presence almost doubles its contribution to the size of the economy. This is the case for the Canaries and Baleares – two important destinations for international tourism.

Moreover, there is a strong concentration of Spain's global presence into just two autonomous communities, Catalonia and Madrid. These two account for over 41% of Spanish global presence – slightly over their participation in national GDP, which amounts to just under 38%.

TABLE 2.9.
Variations of contributions by autonomous communities to Spain's global presence (2005-2014)

Autonomous community	2014	2005	2005-2014 var.
Andalusia	12.87%	12.83%	0.03
Aragon	1.95%	2.19%	-0.24
Asturias	1.65%	1.48%	0.17
Baleares	4.70%	6.17%	-1.47
Canaries	5.70%	6.46%	-0.76
Cantabria	1.85%	1.60%	0.25
Castile and Leon	2.99%	3.24%	-0.25
Castile-La Mancha	1.79%	1.48%	0.32
Catalonia	21.59%	22.44%	-0.85
Ceuta	0.04%	0.02%	0.02
Valencia	8.95%	9.29%	-0.33
Extremadura	0.86%	0.82%	0.04
Galicia	4.92%	4.42%	0.50
Madrid	19.50%	18.87%	0.63
Melilla	0.04%	0.02%	0.02
Murcia	2.86%	1.98%	0.89
Navarre	1.35%	1.19%	0.16
Basque country	5.95%	5.05%	0.90
Rioja	0.43%	0.47%	-0.04

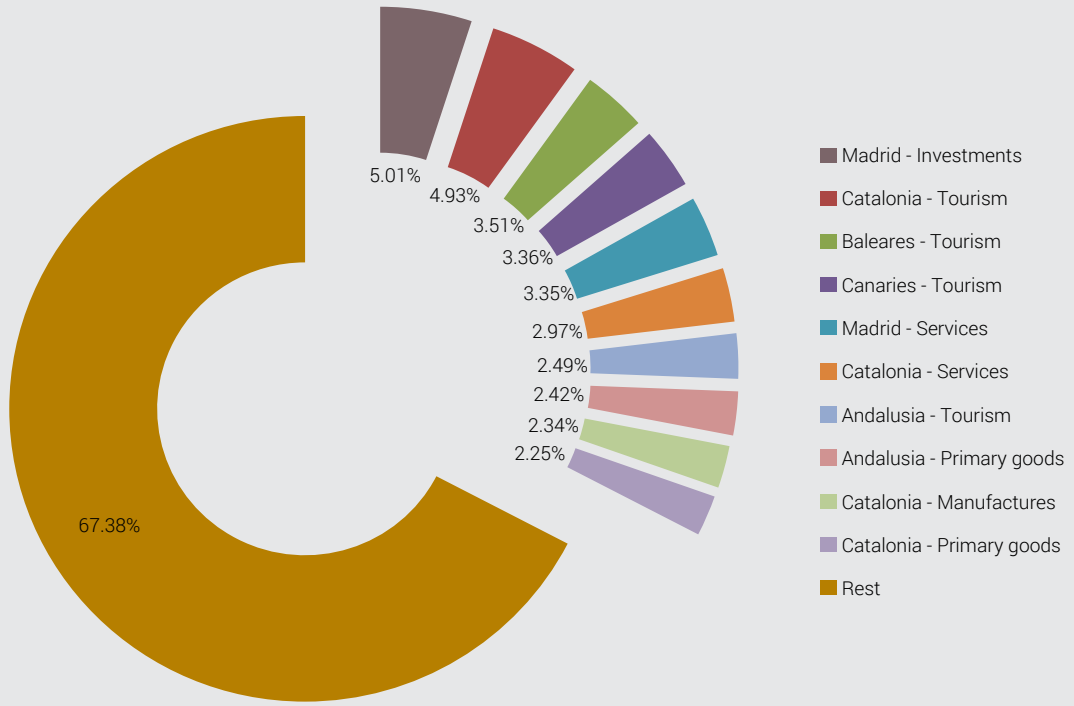
As pointed out in previous studies, the global presence index aims at reflecting structural trends. In this sense, short-term elements scarcely have an impact on global presence values. This is probably why there have been no significant variations in the contributions of each autonomous community to Spain's global presence over the 2005-2013 period (table 2.9). Catalonia records a small decrease (of 0.85 points) in its contribution, and Madrid a mild increase (0.63 points). Some communities have recorded more significant variations, like Baleares (whose contribution decreases by 1.22 points) or Murcia and the Basque country (recording an opposite trend, up by 1.03 and 1.19 points, respectively).

The strengths of Spanish global presence are the country's exports of primary goods and its capacity to attract international tourists. This being the case, we should expect that the autonomous communities that contribute most to the country's external projection are agricultural producers and tourist destinations. Apart from very important contributions by Catalonia and Madrid, other poles of international tourism such as Andalusia or the Balearic and Canary islands boast important participation in the country's global presence. Similarly, Murcia contributes a higher proportion to global presence than to Spain's GDP as a result of its significant production and export of primary goods (table 2.8).

The distribution of Spain's global presence in terms of both variables and autonomous communities gives evidence to the low added value of the country's external projection. Outward direct investment channelled through Madrid explains just over 5% of aggregated presence, and the fact that the capital is located here, along with a large share of corporate

headquarters, helps to explain this phenomenon. As for Catalonia, its exports of manufactures account for 2.2% of Spanish global presence. However, the bulk of major contributions by variable and community –those that represent at least 2% of aggregate global presence– are of lower added value. Tourism to Catalonia, the Baleares, the Canaries, and Andalusia account for 14% of global presence. Exports of primary goods from Andalusia and Catalonia represent 4.6% of Spain's external projection. As for exports of services (including different levels of technological complexity) from Madrid and Catalonia, these contribute to 6.1% of total global presence (graph 2.7).

GRAPH 2.7.
Contributions by autonomous communities and variables to Spain's 2014 global presence (in %)



3. Europe's global economic presence *vis-à-vis* the emerging markets

Miguel Otero-Iglesias[1]

In the aftermath of the global financial and economic crisis (2007-09), and the subsequent European debt crisis (2009-ongoing), many scholars and pundits have claimed that Europe is inexorably in decline, and that economic and, consequently, political power is shifting from the West, especially from Europe, to the East, primarily to China.[2] Others, however, have contested this analysis, pointing to the fact that Europe is still one of the most wealthy trading and investment blocs, and hence arguing that its apparent decline is overstated.[3] In this chapter I will try to provide some empirical evidence to that debate.

By using the Big 5 European economies (Germany, United Kingdom, France, Italy, and Spain, henceforth EB5) as a proxy for European global economic presence, I have employed the empirical data from the Elcano Global Presence Index from 1990 until 2014 to compare their performance with what are generally the groupings most cited when describing the increased global presence of emerging markets: the BRICS (Brazil, Russia, India, China, and South Africa) and the Next 11 (Bangladesh, Egypt, Indonesia, Iran, South Korea, Mexico, Nigeria, Pakistan, Philippines, Turkey, and Vietnam, henceforth N11).[4]

The data show that the Big 5 European economies have lost considerable ground in their share of world economic presence. Nonetheless, when we desegregate the data, we discover a number of peculiarities. The BRICS have closed the gap with the EB5 much more than the N11 have done, making the BRICS more interesting to analyse. Furthermore, within the BRICS, the out-performer (and hence outlier) is China; thus it could be argued that the rise of the rest might be better described as the rise of China. Interestingly, in recent years India has also performed well, and it could potentially become the new star of the BRICS. Russia, by contrast, has reached a plateau and might even reverse its gains.

1 Senior analyst at the Elcano Royal Institute. I would like to express my gratitude to Manuel Gracia for helping me with the graphs in this chapter.
2 Mahbubani, Kishore (2008), *The New Asian Hemisphere: The Irresistible Power Shift to the East,* New York, Public Affairs. Quah, Danny (2011), 'The Global Economy´s Shifting Centre of Gravity', *Global Policy* 2(3), 3-9. For a review of the literature see Cox, Michael (2012) 'Power Shifts, Economic Change and the Decline of the West', *International Relations* 26(4), 369-388.
3 Moravcsik, Andrew (2013), 'Why Europe is the other Superpower in the 21st Century (and China is Not)', paper presented at Johns Hopkins School of Advanced International Studies, Baltimore, September 6.
4 Both concepts, the BRIC and the N11, were coined by Jim O'Neill, the chief economist of Goldman Sachs, in 2001 and 2005, respectively.

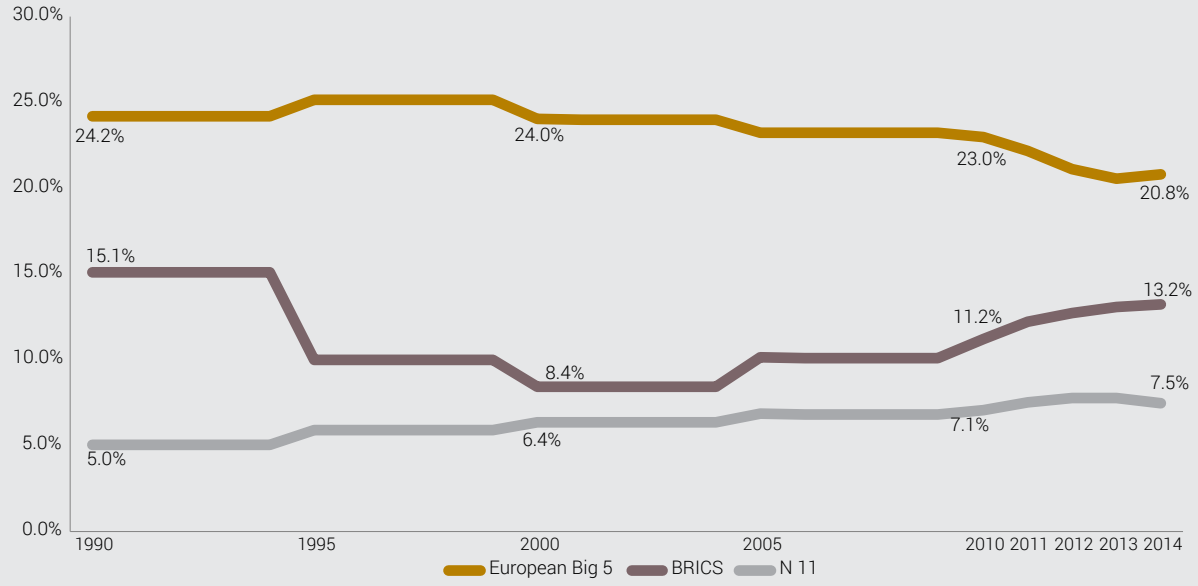
Differences also exist within the EB5. Here the out-performer is without a doubt Germany. In this regard, the analysis presented here shows that over the past 25 years, the two champions of global economic presence within the EB5 and the BRICS are Germany and China, respectively. The complementarities of their economies have certainly helped to enhance their performance, which explains why their political leaders have recently invested so much political capital in strengthening their bilateral relationship.[5] China and Germany feed each other in economic presence.

Within the EB5, the United Kingdom has also shown considerable dynamism over recent years, and it is (after Germany) the 2nd best performer in the group. Despite being generally described as stagnant, France has not done too badly — certainly better than Italy and Spain, which have recently been overtaken by India. Within the BRICS, the laggards are Brazil and South Africa, and especially the latter, which has barely increased its global economic presence over the past quarter of a century.

Europe down, BRICS up, and N11 square

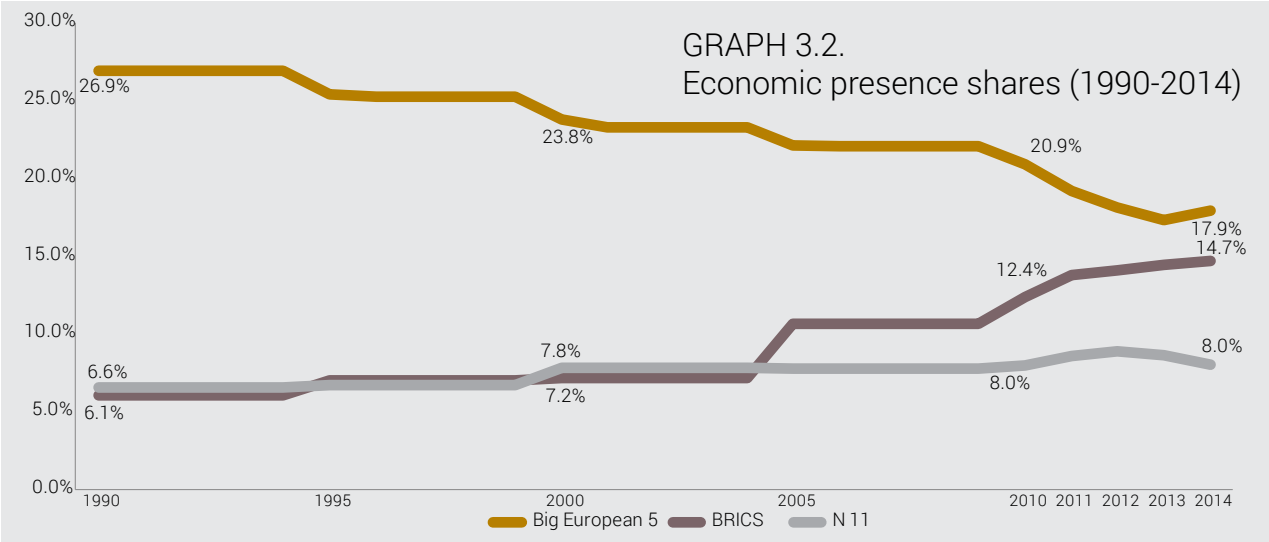
When observing graphs 3.1 and 3.2, one can see that the EB5 have lost ground both in general global presence and, specifically, in global economic presence. Not surprisingly, this loss of share has been more pronounced in the economic field, where both the BRICS and the N11 are strongest, since roughly 60% of their global presence relies on this indicator (see graph 3.3 on the contribution of economic presence in overall presence). While in 1990 the share of general global presence of the EB5 was 24.2%, by 2014 it had decreased to 20.8%. This drop was even starker in economic presence, with the share falling 9 points from 26.9 to 17.9%.

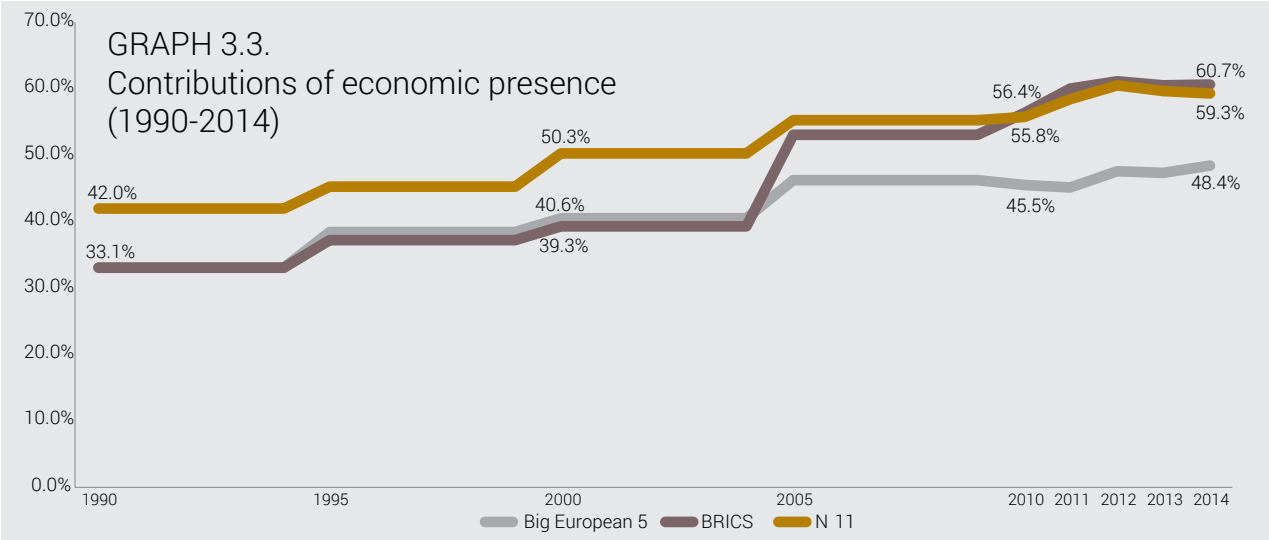
GRAPH 3.1.
Global presence shares (1990-2014)



5 Kundnani, Hans and Jonas Parello-Plesner (2012), 'China and Germany: Why the Emerging Special Relationship Matters for Europe', *Policy Brief* ECFR 55, ECFR, May.

Graph 3.2 also shows that the BRICS have over the past few years caught up much more forcefully with the EB5 than has the N11. While the BRICS went from a share of 6.1% in 1990 to 14.7% in 2014, the N11 increased only from 6.6% (a higher share than the BRICS at that time) to 8%. This may explain why since the term was coined, the concept of the N11 has drawn much less attention than that of the BRICS. Table 3.1, which shows changes in position within the economic presence ranking, helps us to understand this circumstance. Here one can see how, of the N11 countries, only South Korea and Turkey have moved up the ranks, with the former doing considerably better than anyone else in the grouping. This comes as no surprise. Over the past 25 years, South Korea has moved from a low-middle income to a high income country, with a highly competitive and globalized economy.[6] By contrast, countries such as Iran, Egypt, Pakistan, and even the Philippines have disappointed in this field. Finally, countries with large populations and therefore with enormous potential, such as Nigeria and Mexico, have merely maintained their positions (despite the former being a big energy exporter and the latter a manufacturing powerhouse).





6 Hyun, Oh-Seok (2012), 'South Korea miracle sets shining example', *The National,* June 14.

TABLE 3.1.
Economic presence ranking (1990-2014)

	1990	2000	2014	1990 -2014 Variation
European Big 5				
United Kingdom	4	2	5	-1
Germany	2	3	3	-1
France	3	4	7	-3
Italy	8	9	14	-6
Spain	13	13	18	-5
BRICS				
China	17	10	2	+15
Russia	12	11	4	+8
India	39	31	13	+26
Brazil	23	25	20	+3
South Africa	29	35	43	-14
N 11				
Bangladesh	68	75	73	-5
Republic of Korea	21	14	16	+5
Egypt	51	55	62	-11
Philippines	52	48	59	-7
Indonesia	24	23	25	-1
Iran	28	30	41	-13
Mexico	22	15	22	=
Nigeria	30	34	30	=
Pakistan	61	67	70	-9
Turkey	38	40	47	+1

The EB5 economies have all lost positions, although some more than others. Germany and the United Kingdom have only lost one position each, showing that their economies are still resilient to the competition coming from the global south and east. Still, it must be highlighted that Germany is doing better than the United Kingdom; in 2000 the United Kingdom was the 2nd global economic actor, and now it is the 5th, while Germany has maintained its 3rd position[7]. France, for its part, has not lost as much ground as one might expect (it has lost three positions), demonstrating that it remains economically powerful. Certainly more so than Italy or Spain, which have lost 6 and 5 positions, respectively.

The data therefore show that the EB5 are in decline, but that the United Kingdom and Germany are holding their ground vis-à-vis the BRICS. More worrisome is the performance of Italy and Spain, which need to undertake considerable reforms (reindustrialization, further internationalization, and more investment in education and high tech sectors) if they want to retain both their relatively high living standards and their global economic presence. To achieve this, they will need to resist the increasing competition coming from the best performers within the BRICS group, above all from China, which has climbed 15 positions since 1990 and is now the 2nd performer in terms of global economic presence after the

7 Despite the fact that the United Kingdom has surpassed Germany in global presence, as shown in chapter 1.

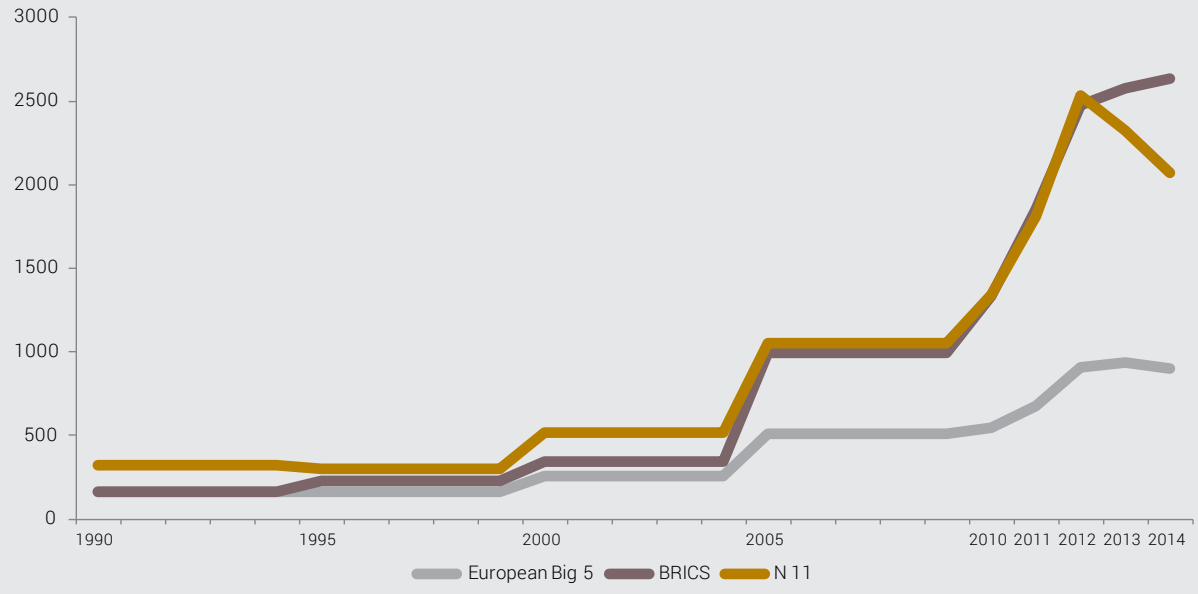
United States. Interestingly, despite its outstanding performance, China has climbed fewer positions than India, which has moved all the way from rank 39 to 13. This is significant because by focusing on China, we often forget India's tremendous achievements.

EB5 still dominant in services and investments

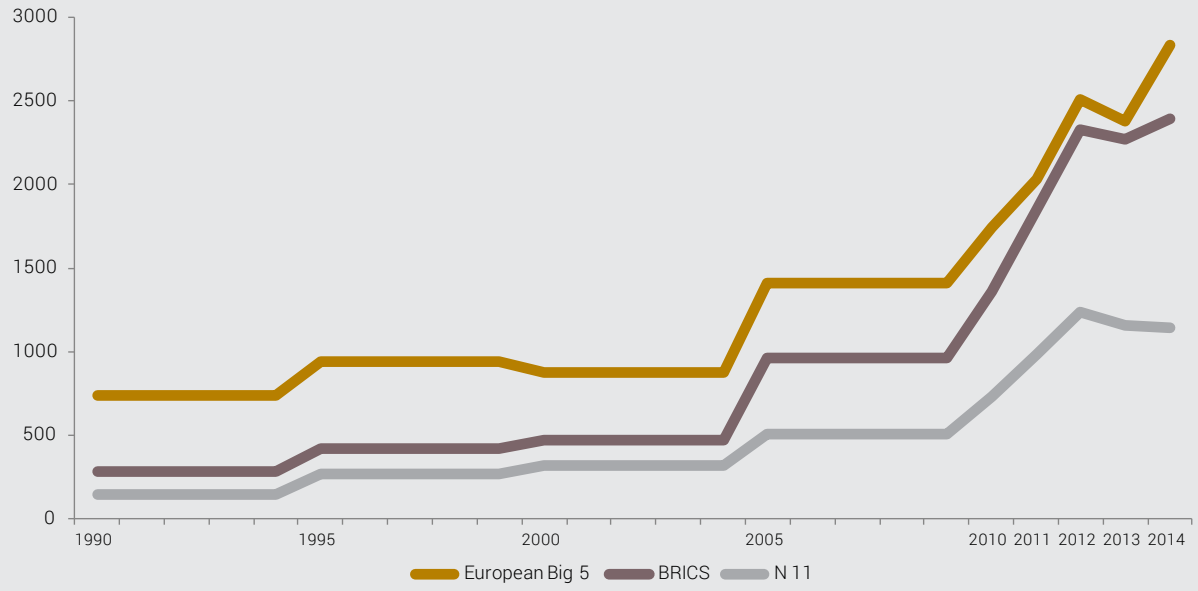
Since our data divide the global economic presence of the different countries and groupings into 5 sectors (energy, primary goods, manufactures, services, and investments), the next step is to undertake analysis in those sectors in which the BRICS and the N11 gain more ground (see graphs 3.4 to 3.8). Here the empirical evidence reinforces the general trend explained above. The N11 grouping has under-performed compared to the BRICS in all 5 economic indicators. So for now, the real competitors for the EB5 remain the countries that comprise the BRICS.

Concretely, where the BRICS (and also the N11) do outperform the EB5 is in the field of energy. This is a structural factor that will be difficult to change in the short term, although the focus on renewable energy and shale gas might bring some changes in the long term. Energy is also a field that is highly volatile and dependent on the price of oil and gas. In this regard, the recent fall in the price of oil might reduce the global economic presence of the BRICS, especially considering that energy represents the highest single contribution (19%) to their total global presence.

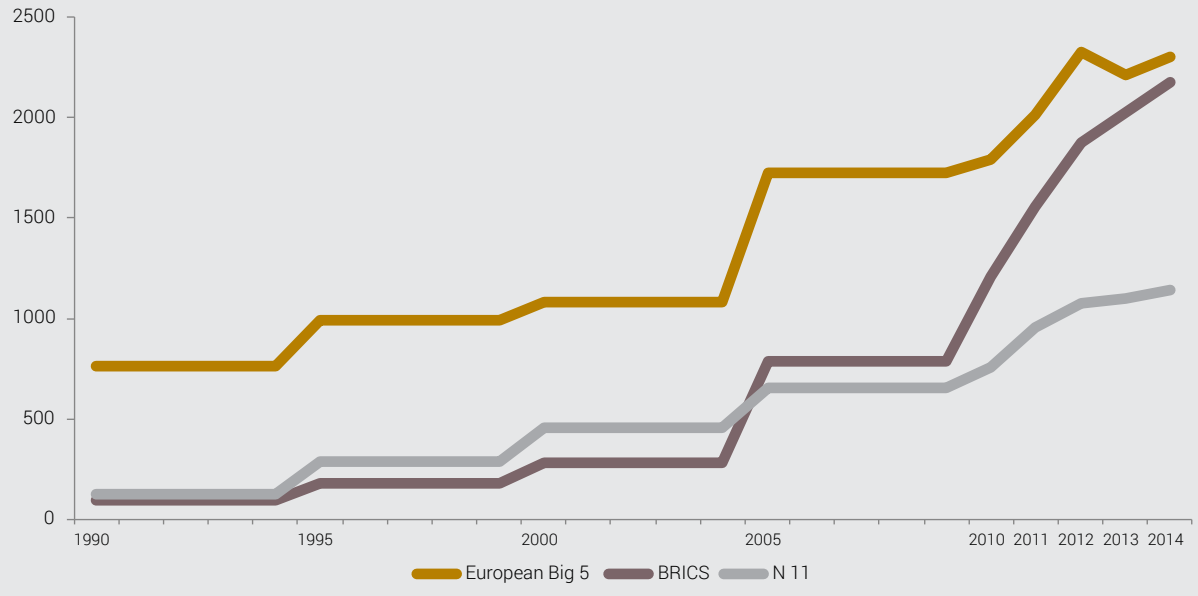
GRAPH 3.4.
Energy presence (1990-2014, in index value)



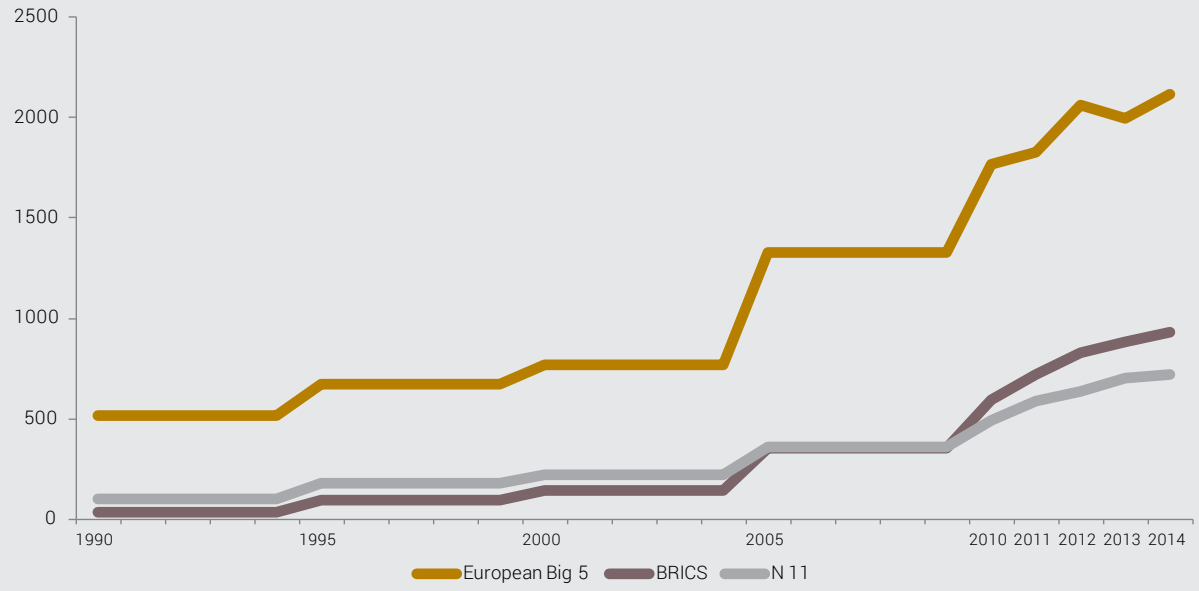
GRAPH 3.5.
Primary goods presence (1990-2014, in index value)



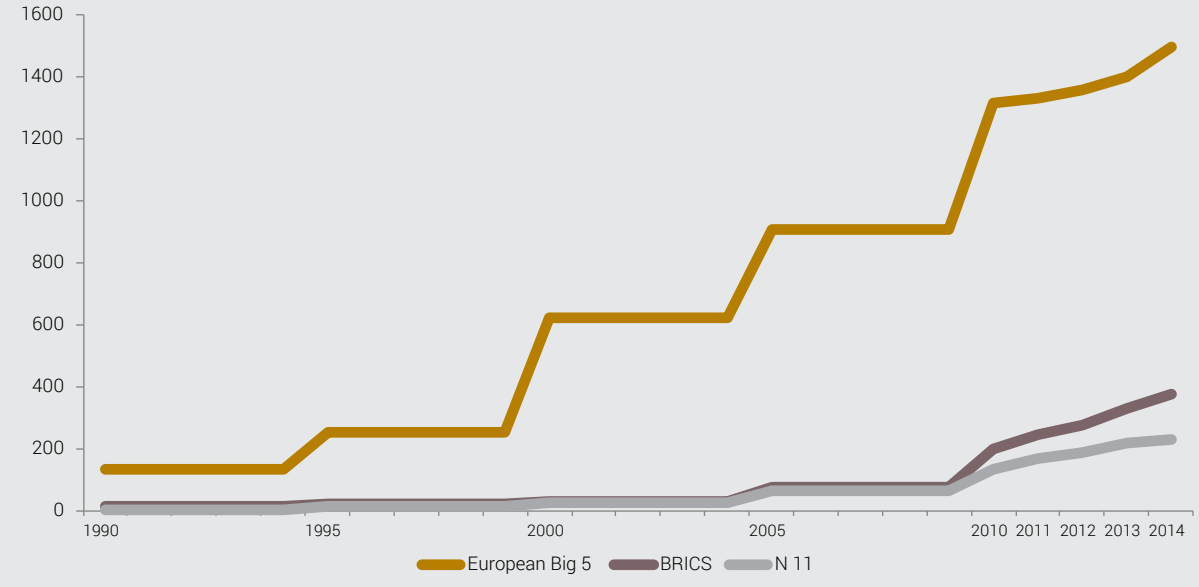
GRAPH 3.6.
Manufactures presence (1990-2014, in index value)



GRAPH 3.7.
Services presence (1990-2014, in index value)



GRAPH 3.8.
Investments presence (1990-2014, in index value)



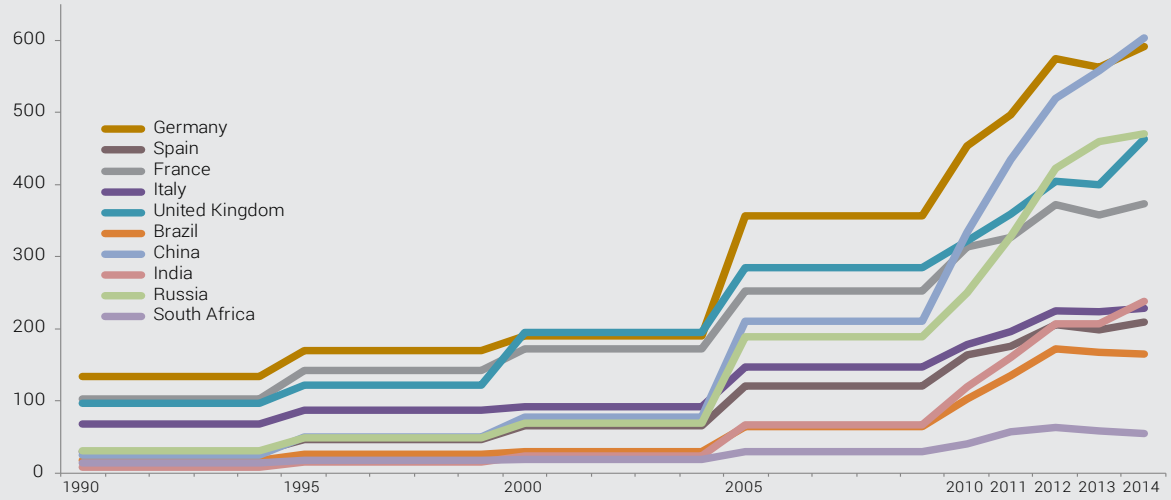
When it comes to primary goods and manufactures, the EB5 remains on top of the three groupings, holding its ground in primary goods while gradually losing the race in manufactures. If the trend continues, it is very likely that in future years the BRICS will surpass the EB5 in manufacturing presence, despite all the rhetoric in Europe about reindustrializing the economy. Leaders in the United Kingdom, France, Italy, and Spain have lately argued that one of their priorities is to revamp their manufacturing sectors, following the German example, but so far the effects have been minor.

Where the EB5 countries remain strong is in services and foreign investment. In these fields, not only have they not lost ground against the BRICS and the N11, they have expanded it, especially in the area of investments. Given that these sectors are larger in monetary volume and more attractive as regards added-value, and therefore offer higher margins, the decline of the EB5 *vis-à-vis* the BRICS might be less than commonly assumed. Europe remains a giant in services and investment. Of course, this does mean that a lot of European investment flows out of the continent, which explains why investment levels in Europe have dropped so much in recent times.

'Chermany' on the rise

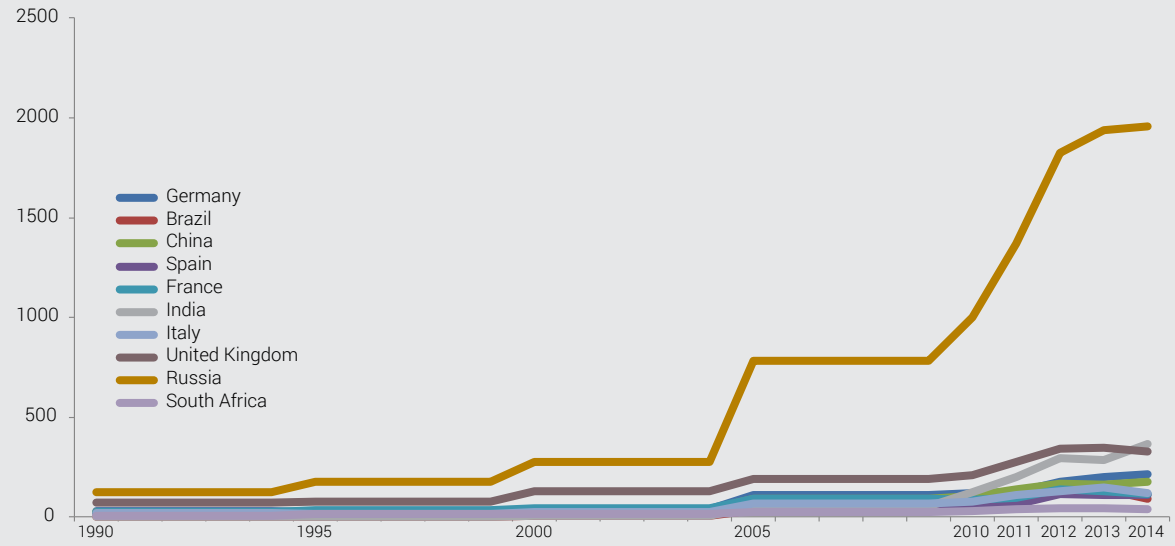
However, looking just at the EB5 and the BRICS as groupings can be deceiving, because there might be considerable differences among the countries forming one or both of the groups, or even between countries across the two groups. To understand the trends in greater detail it is therefore necessary to analyse the performance of every single country – first overall in the global economic presence index, and then in each of the 5 economic sectors presented above. This is shown in graphs 3.9 to 3.14 for the 5 countries that form the EB5 and the BRICS. The same could also be done for the N11, but due to space constraints such analysis will not be done in the present report.

GRAPH 3.9.
Economic presence (1990-2014, in index value)

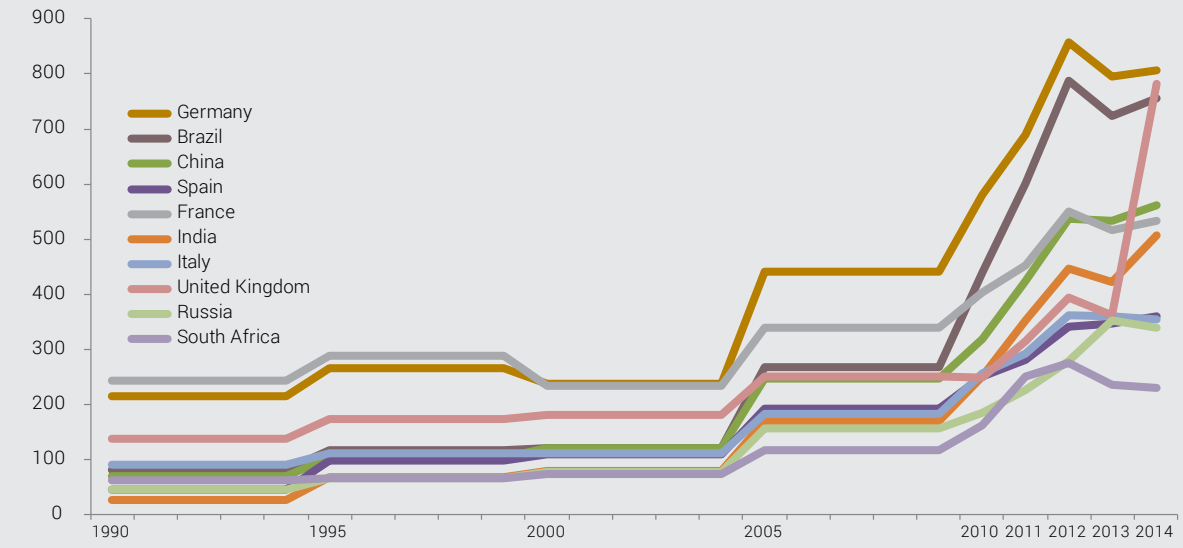


Graph 3.9 is perhaps the most illustrative because it shows how the two biggest world exporters are Germany and China; in other words, 'Chermany'[8] have out-performed everyone else. This is a joint success because they have each fed the other's economies over the years. Germany is the European country that has invested most in China, thus helping it to develop rapidly. This has made China a manufacturing powerhouse (see graph 3.12) on the basis of German engineering. Especially during the global and European financial crises, Germany has benefited greatly from the growth of China. German machines are used not only for manufacturing, but are also essential to China's real estate and infrastructure sectors.

GRAPH 3.10.
Energy presence (1990-2014, in index value)

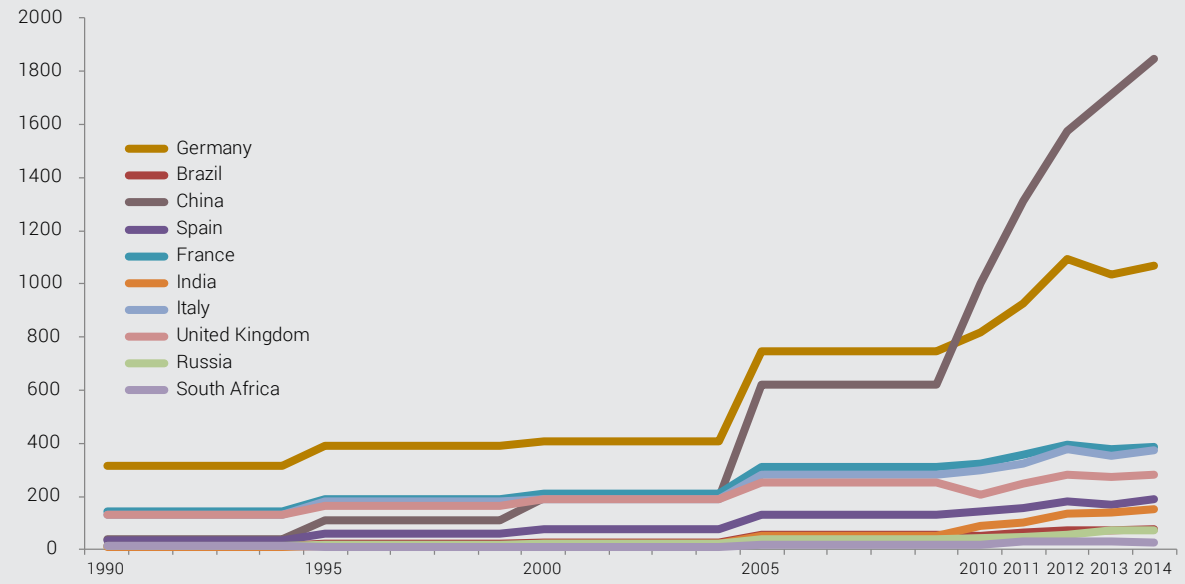


GRAPH 3.11.
Primary goods presence (1990-2014, in index value)

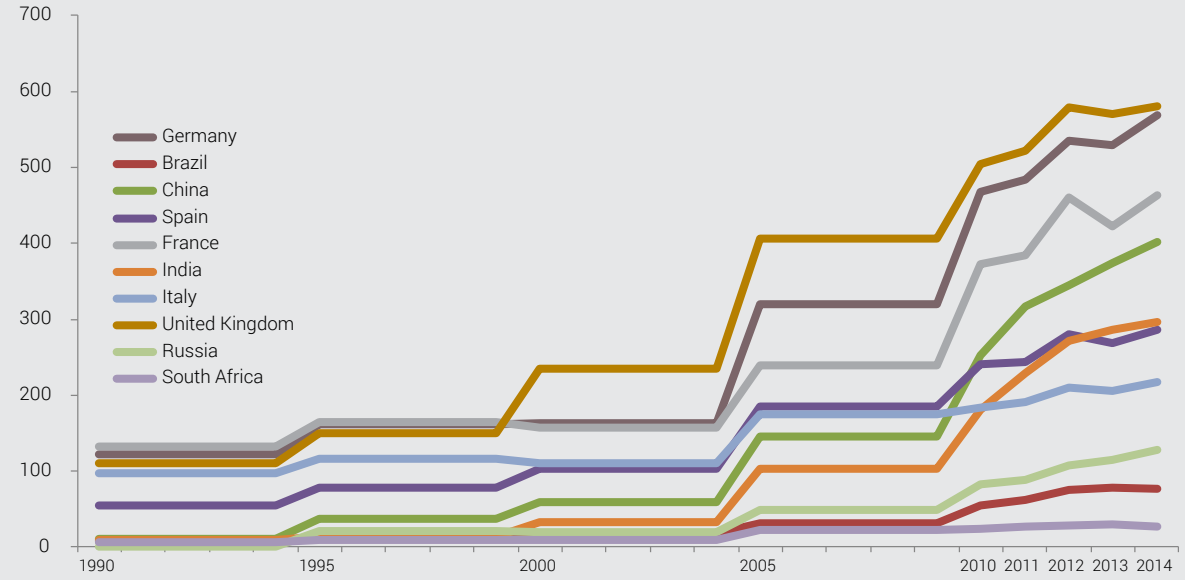


8 Wolf, Martin (2010), 'China and Germany unite to impose global deflation', *Financial Times,* March 16.

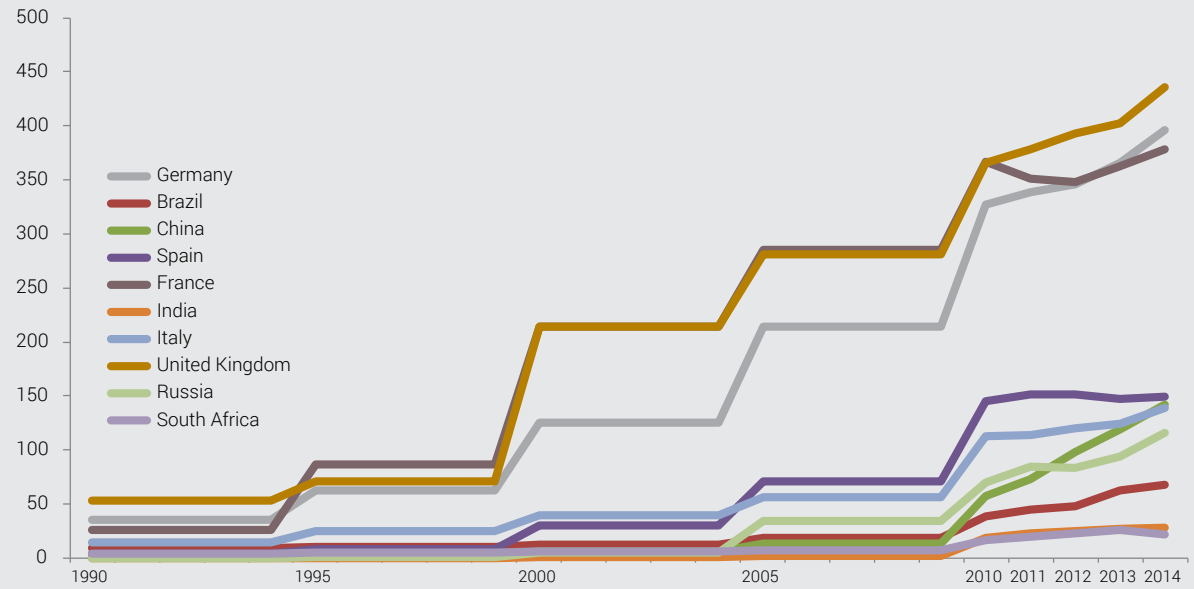
GRAPH 3.12.
Manufactures presence (1990-2014, in index value)



GRAPH 3.13.
Services presence (1990-2014, in index value)



GRAPH 3.14.
Investments presence (1990-2014, in index value)



On top of this, the newly emerging middle classes of China are particularly keen on German luxury cars, sales of which have skyrocketed over the past few years. On the other hand, Germany has also benefitted from cheap manufactured products from China, which have kept the purchasing power of the German population high. Thus, the interdependence between China and Germany is extremely strong. It remains to be seen whether this trend will continue. What is clear is that on the basis of this robust economic relationship, Berlin and Beijing have strengthened their political partnership to such an extent that the German chancellor visits the capital of China at least once a year.[9]

After China and Germany, the next countries with the greatest economic presence are Russia and the United Kingdom, followed by France. As can be seen in graph 3.10, Russia draws most of its strength from the energy sector, which means that the recent fall in oil prices will hit that country twice in the coming years. Falling prices will reduce Russia's global economic presence in energy as well as in other variables, such as investments. If one wants to see the positive side, the fall in oil and gas prices might conceivably force the Kremlin to diversify its economy, which could increase Russia´s manufacturing sector; but so far this is merely a hope, rather than a well planned-out strategy.

The United Kingdom retains a lot of its presence thanks to services and investments (see graphs 3.13 and 3.14), where it outperforms everyone else. The City of London, of course, remains an important asset with a tremendous global footprint. Where the United Kingdom has remained stagnant is in manufacturing — but so has everyone else, with the exception of the 'Chermany' tandem (see graph 3.12). The United Kingdom experienced a notable jump in the export of primary goods from 2013 to 2014 (see graph 3.11), but this appears

9 Kundnani, Hans (2015), *The Paradox of German Power,* Oxford, Oxford University Press.

to be mainly due to a one-off trend. Recently, a lot of gold stock has been shipped from the United Kingdom (especially from London) to Asia (particularly to India and China) via Switzerland, which has great refining capacity (see chapter 1). In the primary goods sector, Brazil performs particularly well due to its agricultural products, but so does Germany, which exports far more primary goods than is normally assumed (especially copper and aluminium items such as tubes, but also processed food).

Italy and Spain sliding down

These data also show in more detail the weaknesses of Italy and Spain, which in recent years have been overtaken not only by the 1st two BRICS (China and Russia) but also by a 3rd: India (see graph 3.8). The rise of the other big Asian giant, with more than 1 billion people, can be explained by its minor advances in the export of energy and especially by its progress in the export of primary products and services (graphs 3.12 and 3.13). It is well known that India excels in information technology, but it is also strong in various consultancy and advisory sectors, from call centres to medical treatments to educational support. Brazil, on the other hand, has very little to show in the way of services, and its manufacturing sector has declined. This might relate to the fact that Brazil has in recent years undergone a deindustrialization phase, not least because of fierce competition from China.

The weaknesses of Italy and Spain can be located in the loss of market share in primary goods. In this regard, competition from Brazil is clearly hurting them in global presence terms. Also significant is their stagnant performances in manufacturing (although here Italy retains a higher level than Spain, explaining its greater economic presence overall) and in services (where Spain, though stronger than Italy, has just been overtaken by India). Finally, in terms of investments, Spain has reached a plateau, while Italy is about to be overtaken by China — which only 10 years ago was relatively absent from this field, behind even Brazil. Overall, Italy and Spain are performing worse than France, which is losing some ground in all sectors (except investments), but very gradually.

The conclusion to be reached here is that all three countries —France, Italy, and Spain— need to introduce a number of reforms (for example, reindustrialization and more investments in value-added services) if they want to retain their fair share of global economic presence. It is logical that big countries such as China, India, or even Brazil should someday overtake the European countries, but this does not justify some of the stagnation that these countries have experienced in certain fields. Both the United Kingdom and Germany have demonstrated that Europe can continue to be highly competitive and productive, and thus retain a good deal of market share in manufacturing, primary goods, services, and investments.

Nonetheless, even if the EB5 countries were to enhance productivity, increase their dynamism, and accelerate their growth rates, the structural trend shows that global economic presence is gradually moving eastward[10]. India and China have closed the gap over the past 25 years, and it is very likely that they will continue to do so. This, of course, means that if the EB5 countries want to continue to shape the norms and rules in the field of global economic

10 As pointed out in Olivié, Iliana and Manuel Gracia (2013), *Elcano Global Presence Index 2012,* Elcano Royal Institute.

governance, they will have to coordinate their positions much more and act in unison within the European Union structures.

In this regard, it is worrying to hear an ever-greater number of voices from the best performing countries (the United Kingdom and Germany, but also France), calling for a renationalization of their economies; in the United Kingdom there is even talk of leaving the European Union (the so-called Brexit). Although these three countries still have a lot of global economic presence, and global presence overall (including military and soft), they will become mid-sized economies unable to compete with the United States, China, or India unless they join efforts. If they do not, their global economic footprint will only diminish faster.

4. The role of Asia in globalization: much more than just China and economics

Mario Esteban[1]

As discussed in the previous chapter, Asia and especially China have gained considerably from economic globalization since the end of the Cold War. And economic gain is without a doubt the best known facet of the process of internationalization currently being experienced by most Asian countries.[2] In this chapter, we will explore other dimensions, military and soft, where the specific weight of Asia has also grown significantly, demonstrating that Asia is not merely China, and that the growing international presence of this region is not limited to the economic sphere.

When analyzing the evolution since 1990 of shares of global presence by region, one notes both the decline of the traditional powers, Europe and North America, as well as the emergence of Asia (table 4.1). In fact, the increase in the Asian weight of presence is greater than the sum of the increased shares of all other regions that experienced expansion in that period. These developments point toward Asia soon overtaking America as the region with the second-largest share of global presence. In 2010, the American share of 20.5% was four points higher than Asia's, at 16.5%. Four years later, this gap has narrowed to just four tenths of a percent: 18.4% versus 18.0%.

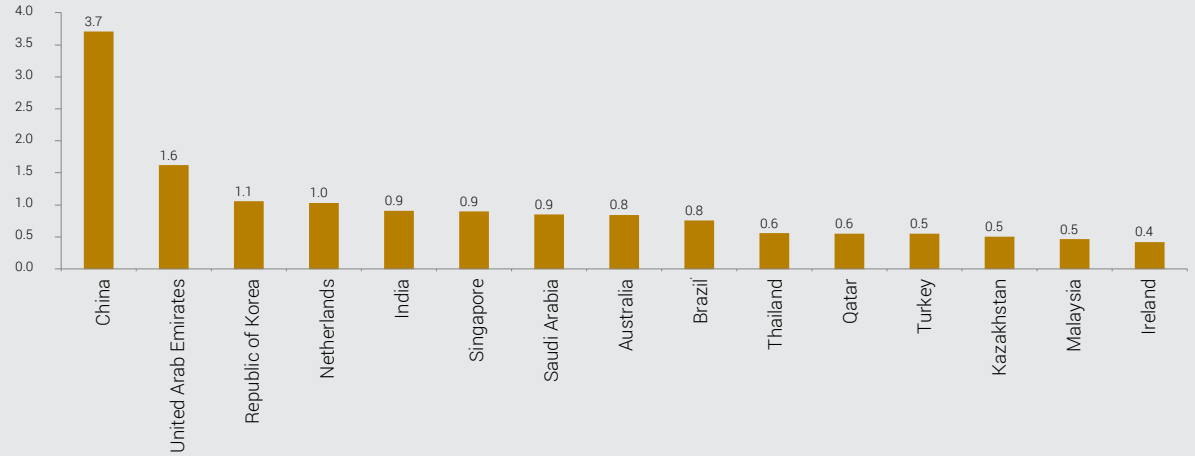
TABLE 4.1.
Shares of global presence by region, and variations (1990-2014, in percentual points)

	1990	1995	2000	2005	2010	2014	1990-2014 Variation
Asia	11.3%	14.5%	14.5%	15.6%	16.5%	18.0%	6.8
Europe	50.8%	48.1%	45.4%	46.7%	47.3%	45.6%	-5.2
Latin America	3.6%	4.1%	4.3%	4.4%	4.7%	5.1%	1.5
Maghreb & Middle East	5.5%	4.9%	6.2%	7.0%	6.9%	8.6%	3.1
North America	26.1%	24.9%	25.9%	22.5%	20.5%	18.4%	-7.7
Oceania	1.7%	2.3%	2.4%	2.4%	2.6%	2.5%	0.8
Sub-Saharan Africa	0.9%	1.2%	1.3%	1.4%	1.5%	1.6%	0.7

1 Senior analyst at Elcano Royal Institute.
2 This phenomenon has been recently addressed using data from previous editions of the Elcano Global Presence Index. See Esteban, Mario (2014), 'The Rise of China and Asia: What the Elcano Global Presence Index Tells Us', *ARI* 21/2014; and Esteban, Mario (2014), 'Globalization in Asia according to the Elcano Global Presence Index ', *Comentario Elcano* 34/2014.

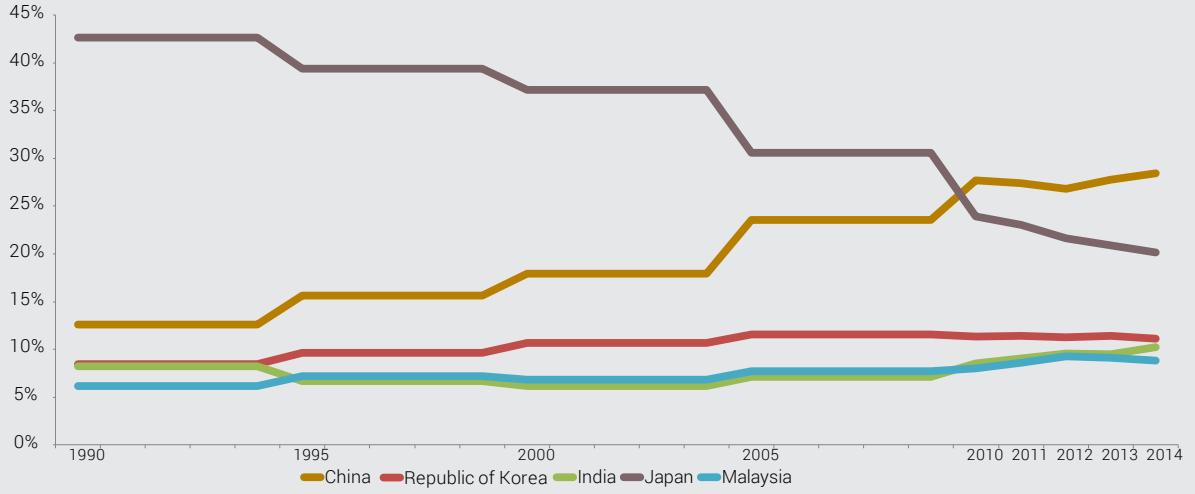
If we observe the ranking of countries that have increased their global presence since 1990, we confirm the notion that China is principally responsible for dramatic increases in the share of Asian presence (graph 4.1). Not surprisingly, China is the country whose share of global presence has grown most over the past quarter century. The Asian giant has increased its share by 3.7 points, equivalent to the sum of the current shares of global presence of Japan and Iceland.

GRAPH 4.1.
Variations in share of presence, 1990 and 2014 (in percentual points)



The significant growth in China's global presence currently represents 28.5% of the overall Asian share, versus just 12.6% in 1990. This increase in the specific weight of China's share of Asian global presence has come largely at the expense of declining Japanese presence (graph 4.2). Nevertheless, China remains far from garnering the percentage share of Asian presence commanded by Japan in 1990, at about 42.7%.

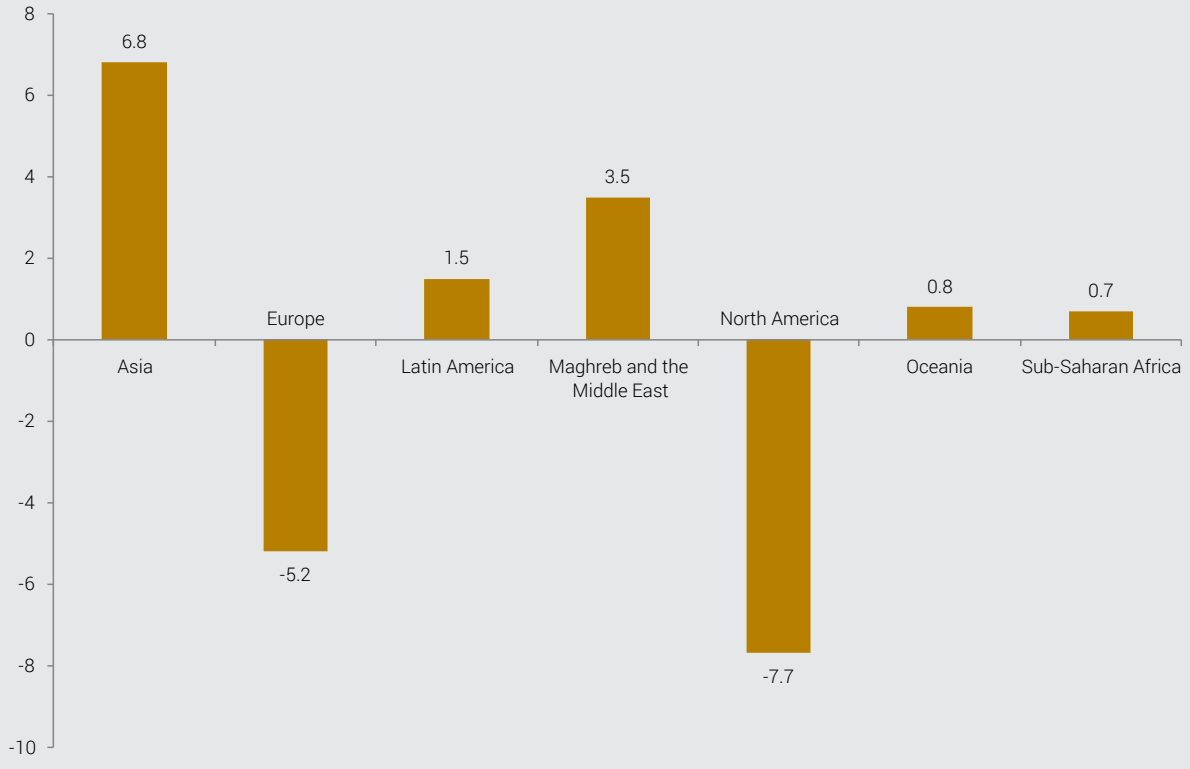
GRAPH 4.2.
Weight by Asian country of global presence (in %)



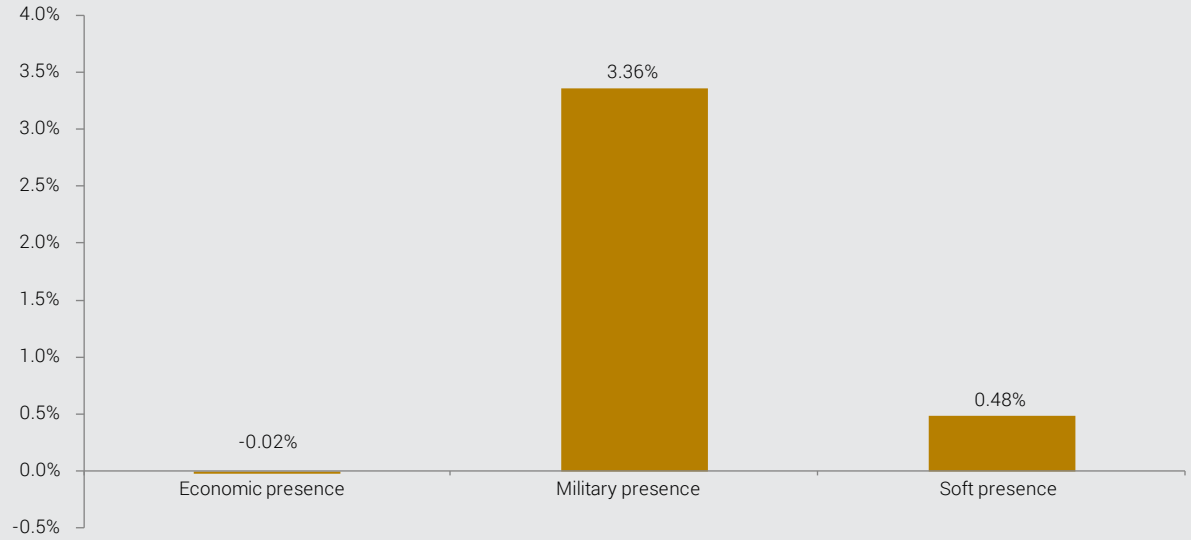
However, this should not blind us to the meaningful advances made by other Asian countries. Indeed, China accounts for less than 50% of the positive gains in presence experienced in the region. Among the 10 countries that have raised their share of global presence, excluding China, four are Asian: South Korea, India, Singapore, and Thailand. If we expand that range to the top 15, Malaysia also appears. If we combine the increased share in presence of those 5 Asian countries, we get a rise of 4.0 percentage points, three tenths of a percent above China's 3.7 points. As for those Asian countries that have lost shares of global presence since 1990, they are only two, Japan and Pakistan. The case of Japan corresponds to a traditional pattern experienced by post-industrial powers, mitigated by its rise in military presence. As for Pakistan, the main factor since the 1990s has been the decline in this country of the number of international migrants, mainly Afghan refugees.

In analyzing the evolution of the shares of Asian global presence (graph 4.3), the first thing that stands out is that this is the region that has most increased its share in the economic as well as in the military and soft dimensions. Furthermore, one notes that it has been the military and not economic dimension that has gained most (10.9 versus 5.9 points, respectively). Moreover, since 2011, shares of Asian military and soft presence, at 3.3 and 0.5 points, respectively, have been outpacing the region's share of economic presence, which has remained stagnant (graph 4.4). That is to say, the share of Asian global presence is currently growing thanks to the military and soft dimensions, which have not been restrained by concurrent the slowdown in Asia's economic internationalization.

GRAPH 4.3.
Variations in share of global presence 1990-2014 (in percentual points)

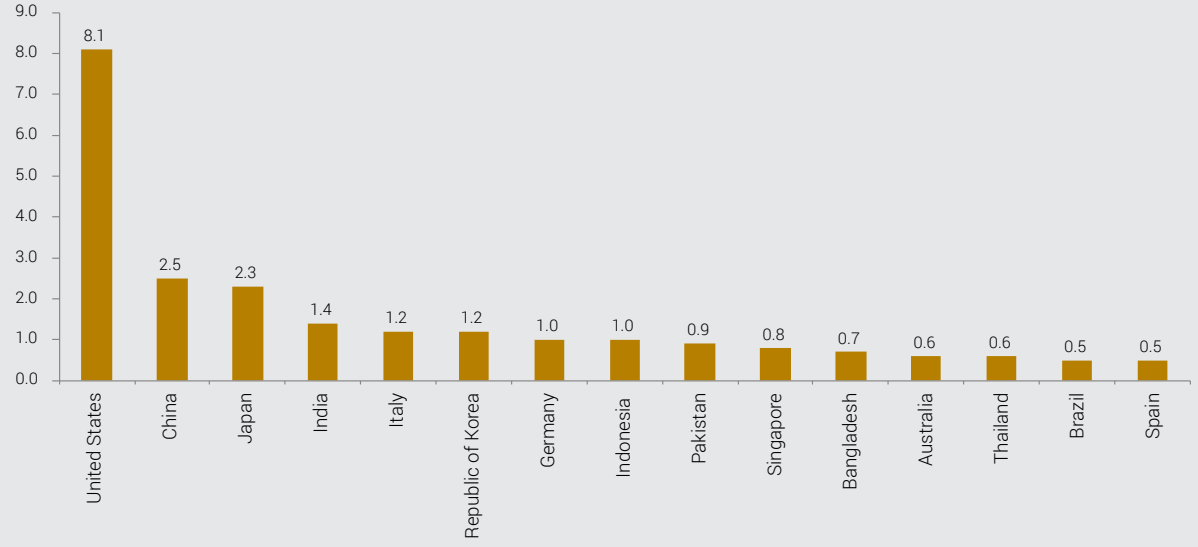


GRAPH 4.4.
Variations between 2011 and 2014 in Asian presence, by dimension (in percentual points)



The rise of Asia's military presence is striking. Considering the rankings of those 15 countries that have increased their military presence since 1990 (graph 4.5), we find three Asian nations within the top 4 (China, Japan, and India), 7 in the top 10 (adding Korea, Indonesia, Pakistan, and Singapore), and at positions 11 and 13 two more Asian countries, Bangladesh and Thailand. Moreover, occupying the 1st and 12th positions are the United States and Australia; not Asian, but very closely involved in security dynamics throughout the region.[3]

GRAPH 4.5.
Major variations in shares of military presence between 1990 and 2014
(in percentual points)



3 For more on Australia's external presence, see chapter 5.

If we compare how Asian states are positioned within different rankings of presence (table 4.2), there appears to be tendency by these countries to project themselves into the military sphere. Of the 13 Asian countries under analysis, 6 have a ranking of military presence much higher than might be expected based on their levels of global presence: Bangladesh, Pakistan, Sri Lanka, Indonesia, the Philippines, and India. Meanwhile, the military presence ranking of two others, South Korea and Thailand, is moderately above their rankings of global presence, while three show a relative balance between military presence and other dimensions (China, Japan, Singapore). Only two Asian countries (Malaysia and Vietnam) exhibit levels of military presence moderately below their global presence ranking.

TABLE 4.2.
Position in 2014 ranking of global presence overall, and by dimensions

	Global presence	Economic presence	Military presence	Soft presence
Bangladesh	73	73	19	75
China	4	2	5	6
India	17	13	8	19
Indonesia	31	25	11	46
Japan	7	12	6	5
Republic of Korea	15	16	9	13
Malaysia	24	24	29	28
Pakistan	67	70	13	57
Philippines	59	59	47	58
Singapore	18	17	18	25
Sri Lanka	79	76	45	78
Thailand	27	28	21	31
Vietnam	53	42	56	53

The data from this latest edition of the Elcano Global Presence Index confirm the continuation of this trend in which Asian countries augment military presence; of the three dimensions of presence, this is the only area in which no Asian country has lost ground in its ranking from the prior year (table 4.3). Indeed, of the 13 Asian countries included in the index this year, 7 have gained position in the military presence ranking: Malaysia, South Korea, Indonesia, Sri Lanka, Bangladesh, Pakistan, and the Philippines. Of the 15 countries that have most increased military presence in 2013-2014, 4 were Asian: South Korea, India, Singapore, and Sri Lanka.

TABLE 4.3.
Variations in ranking between 2013 and 2014

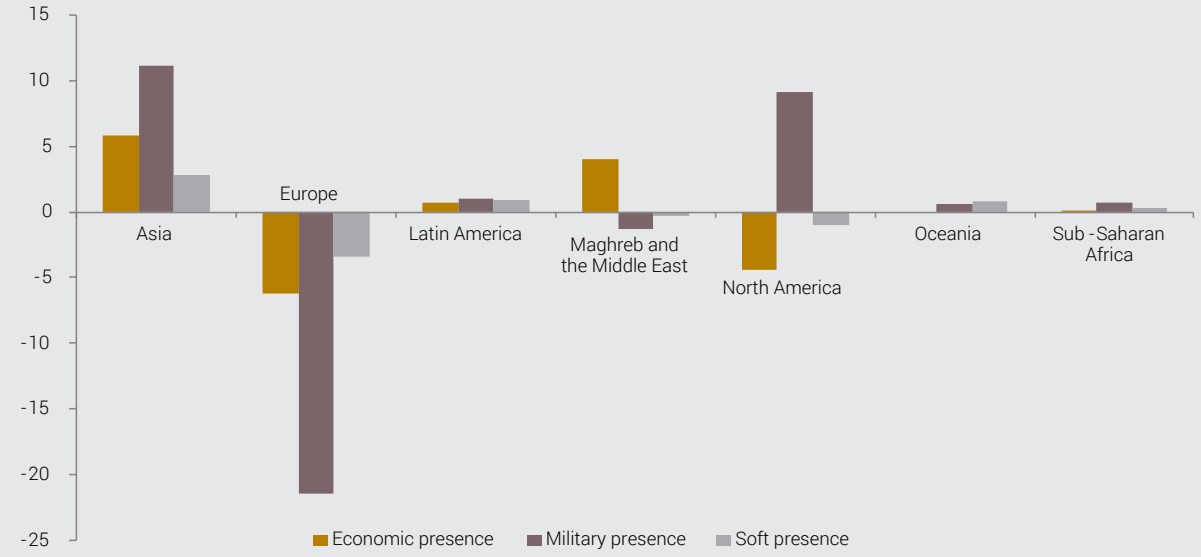
	Global presence	Economic presence	Military presence	Soft presence
Bangladesh	=	+1	+1	=
China	=	+1	=	=
India	=	+4	=	-1
Indonesia	-3	-2	+2	=
Japan	=	-2	=	=
Repubic of Korea	-1	-1	+3	=
Malaysia	+1	+1	+1	-1
Pakistan	-1	=	+1	=
Philippines	+4	+3	+1	=
Singapore	=	-1	=	-1
Sri Lanka	=	=	+2	+1
Thailand	=	-1	=	+3
Vietnam	+2	+7	-1	+3

There are two interrelated processes that explain most of the increased military presence in Asia: the normalization of the Japan Self-Defense Forces, and the modernization of the People's Liberation Army in China. As a result of Japan's defeat in World War II, the country's armed forces have undergone major constraints in their abilities to project force and to deploy troops outside Japanese territory. These limitations have been gradually softening since the early 1990s, and the current government is expected to move with greater urgency in the years to come, as indicated by the National Security Strategy adopted in December 2013. This process has led Japan to become the nation that has most increased its military presence in absolute terms between 1990 and 2014, and the trend has accelerated very noticeably in recent years, in response to the modernization of the Chinese army. China, in turn, is the 2nd-ranked country in terms of increased military presence in absolute terms since 1990, and this rise has triggered reactions similar to the Japanese in China's other neighboring countries. Such measures are understandable, since Asia is a region with numerous open international conflicts while at the same time lacking effective security solutions; still, one has to wonder at the future implications of this phenomenon.

In considering Asia's growing international military presence, we find two competing interpretations. Some call it an arms race, a dangerous process of competition that could result in a militaristic spiral of uncertain outcome. Others posit a more benign interpretation and consider the increase in Asian military presence a sign of greater commitment (by several of the region's countries) to the maintenance of international peace, whether in the interests of advanced economic internationalization or out of a desire to enhance their status within the international community. The data collected by the Elcano Global Presence Index for the period 1990-2014 suggest an ambivalent interpretation. At one extreme we find Bangladesh, India, and Pakistan, which have dramatically increased their contribution of troops to UN peacekeeping missions while reducing or only slightly increasing their means of military projection. China and Indonesia, meanwhile, are countries that currently contribute many more international peacekeeping forces than in the past, but which have also significantly

increased their capability for military projection (especially China). Elsewhere, South Korea and Japan have both increased their contributions to UN peacekeeping missions, but not nearly as much as they have augmented their means of force projection. Finally, Singapore contributes no peacekeeping troops at all, and Thailand very few, for UN missions, despite having strongly increased their means of military projection throughout this period. In other words, with few exceptions, the expansion and modernization of the means of military projection in Asia have ranked above the commitment of these countries to participate in international peace missions.

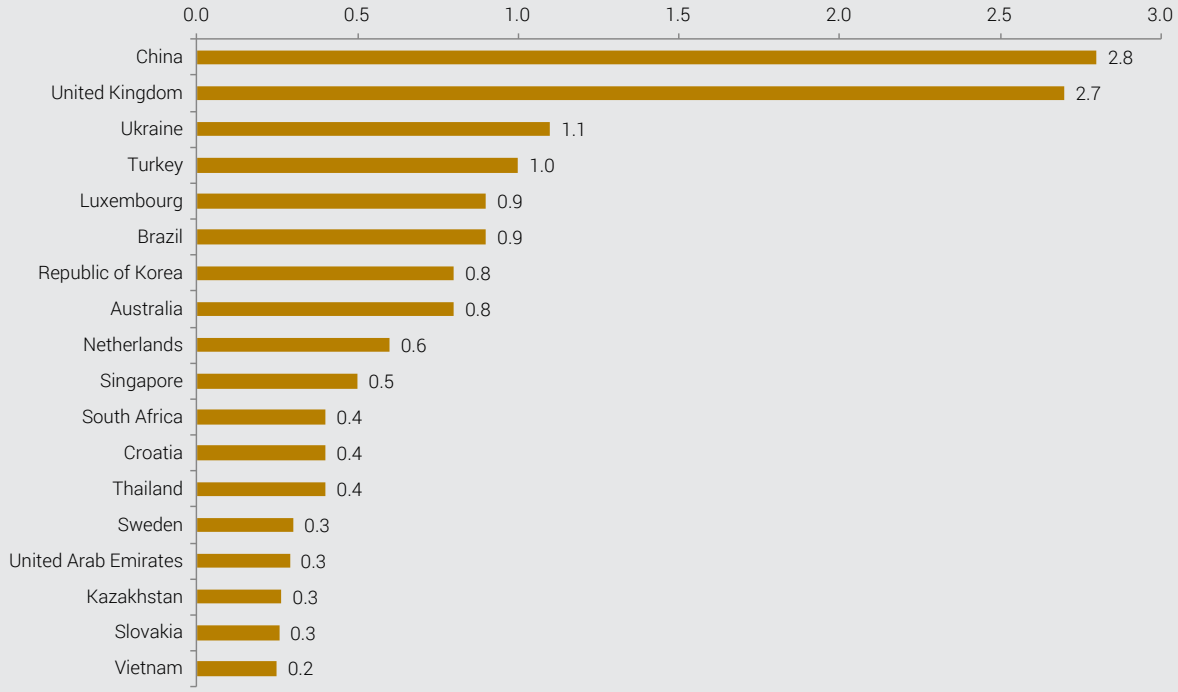
GRAPH 4.6.
Variations in share by dimension and by regional grouping (1990 and 2014, in percentual points)



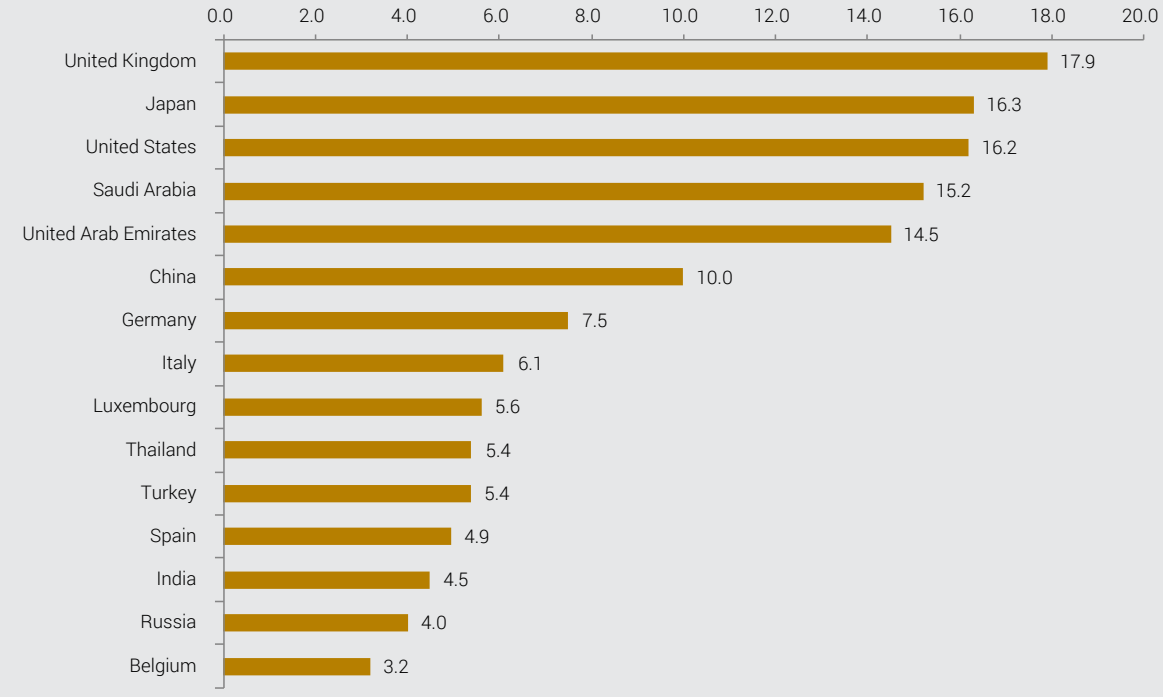
As regards soft presence, the evolution of share by region (graph 4.6) has been much milder than in the cases of economic and military presence. Hence, although Asia has increased its share of soft presence overall, it accounts for only 2.8 points. The country that has most increased its share of soft presence worldwide between 1990 and 2014 is China, with 2.8 points; South Korea ranks 7th place with 0.8 points; and three other Asian countries fall within the first 18 positions: Singapore, Thailand, and Vietnam (graph 4.7).

Observing the absolute variations of soft presence for the past year (graph 4.8), we find three Asian countries among the top 10: Japan, China, and Thailand, with Japan and Thailand increasing their shares over the previous year by one tenth of a percent. China and Thailand were both ranked in this group by the previous edition of Elcano Global Presence Index. Japan, due to sharp cuts to its international cooperation budget, was the only Asian country to show an absolute decline in international soft presence between 2012 and 2013; but this trend has been reversed, and it is precisely the strengthening of development cooperation that explains most of the country's subsequent growth in soft presence between 2013 and 2014.

GRAPH 4.7.
Major variations in shares of soft presence (1990-2014, in percentual points)



GRAPH 4.8.
Principal absolute variations in soft presence, 2013 and 2014



By identifying the variables behind the rise of the soft presence of Asian countries, one finds that tourism appears as a near-constant in those countries that have increased their share. Moreover, the Southeast Asian countries (excepting Singapore and Malaysia) can be said to be almost exclusively responsible for the advance in the continent's overall soft presence. In countries such as China, South Korea, and India, plus the above mentioned Singapore and Malaysia, tourism is not especially impactful or its soft presence is complemented by other variables including science, culture, and education. Also striking is that, with the exception of India, South Asia generally displays a stagnant or declining share of soft presence, because these countries have not boosted tourism like their Southeast Asian neighbors, and because they exhibit considerably lower levels of socioeconomic development, which hampers the positive development of other variables.

In conclusion, it is clear that the growing internationalization of Asia goes beyond China and the economic sphere, the manifestations of the boom in Asian presence with which we are most familiar. However, while China does account for an increasing percentage of Asian global presence, the share of Asian economic presence has stalled since 2011, helping the military and soft dimensions to become the two main sources of Asia's growing share of global presence.

5. A comparative analysis of foreign-policy strategies and global presence: the cases of Australia and South Africa

Carola García-Calvo[1]

Across the four corners of the world, many are the nations that have had to reflect on their current role in the complex international scenario defined by globalization, identifying both risks and opportunities while addressing their own national interests. Some countries have risen to this challenge by collecting into strategic documents or white papers a series of actions and goals to be achieved, in order to optimize their position on the global stage. Such exercises in planning can help not only to better understand the continuous transformations at play in the international arena, but can also contribute to a more transparent, inclusive, and predictable foreign-policy[2].

The Elcano Global Presence Index is not merely a useful tool for decoding the globalization process, its evolution and its tendencies; the index is also an effective, significant foreign-policy instrument. By determining the global presence of the 80 countries examined in the index using the three broad dimensions and the multiple variables on which they are based we can verify how a country (or group of countries) is managing to conform its external projection, whether via soft dimension variables (science, development cooperation, tourism) or via hard dimensions (economic or military, including energy, investments, military equipment, etc.). The profiles for global presence are like X-ray photos, allowing us to capture the nature of a nation's external projection, its strengths and weaknesses, detailing the different ways that countries regard globalization and their potential role in it, their methods of maximizing the opportunities it represents in order to gain international influence or to fulfill their own national agendas.

Are national foreign-policy strategies effectively defining the national interest in countries far from their own borders? Do the objectives sketched out in national strategic documents evolve in accordance with these foreign-policy profiles? To answer these and other questions, we shall analyze the external projection (as it relates to documents of strategic reference) of two countries confronting globalization in different ways: Australia, a middle power; and the Republic of South Africa, an emerging country.

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2 Molina, (Coord.) (2014), 'Hacia una renovación estratégica de la política exterior española', *Informe Elcano* 15. Both Executive Summary and Conclusions are available in English at: *http://www.realinstitutoelcano.org/wps/portal/web/rielcano_en/contenido?WCM_GLOBAL_CONTEXT=/elcano/elcano_in/zonas_in/spanishforeignpolicy/eee0-2014-molina-towards-strategic-renewal-spain-foreign-policy#.VN-hD0v6Jow*

Towards a prosperous Australia: the 'competitive liberalization' of the markets

The philosophical as well as practical principles guiding the strategy for Australian Foreign Policy and Trade were collected for the first time in 1997, in a document entitled 'In the National Interest'.[3] This document was revised once in 2003 and re-published under the title of 'Advancing the National Interest: Australia's Foreign and Trade Policy White Paper'; and though a great number of strategic documents have been published since then, these deal mostly in sectorial terms and provide a much less panoramic view.

In the White Paper, the country defines itself as a medium-sized power operating within globalization, a phenomenon that Australia regards in unquestioningly optimistic terms as an opportunity in 'times of uncertainty' which can yield substantial profits to all countries. The document goes on to define Australia as a 'liberal democracy proud of its commitment to the values of political and economic liberty' — values which have strengthened the nation's international position. As a country with a multicultural society, whose origin and history have been based in immigration, Australia is accustomed to looking beyond its own borders. At the same time, being located in the Asia-Pacific region, Australia is an insular and Western state with strong social, economic, and cultural links to the United States and Europe. The country's national interest is summarized as 'the security and prosperity of Australia and Australians'.

The strategic goals of Australia's international insertion are essentially conducted through economic integration. Hence the cited document proposes an ambitious commercial agenda of 'competitive liberalization' of the markets, using 'bilateral and multilateral channels' to face the competitiveness embodied by expanding markets and emerging economies, and dealing not only in terms of agricultural products and textiles but also the increasing availability of manufactured goods. Consequently, Australia has planned for genuine economic integration via exports of primary goods (agricultural, mining, wine), manufactures and services (for example, related to its nascent automobile sector), and energy, along with financial investments.[4]

Within the soft dimension, the vast potential of the country's multicultural society is emphasized for encouraging 'the interpersonal relationships contributing to our international status'[5], another principal strategic goal. In this sense, in addition to Australian citizens living within the country, one considers also those born or living abroad, as well as the considerable number of foreign students living in Australia, plus of course tourism. The intention here is to project an image of a successful and sophisticated country grounded on scientific and technological knowledge and sports achievements. Australian development aid is also part of the soft agenda given the 'moral duty to eradicate poverty', although such aid primarily focuses on good governance in the region.

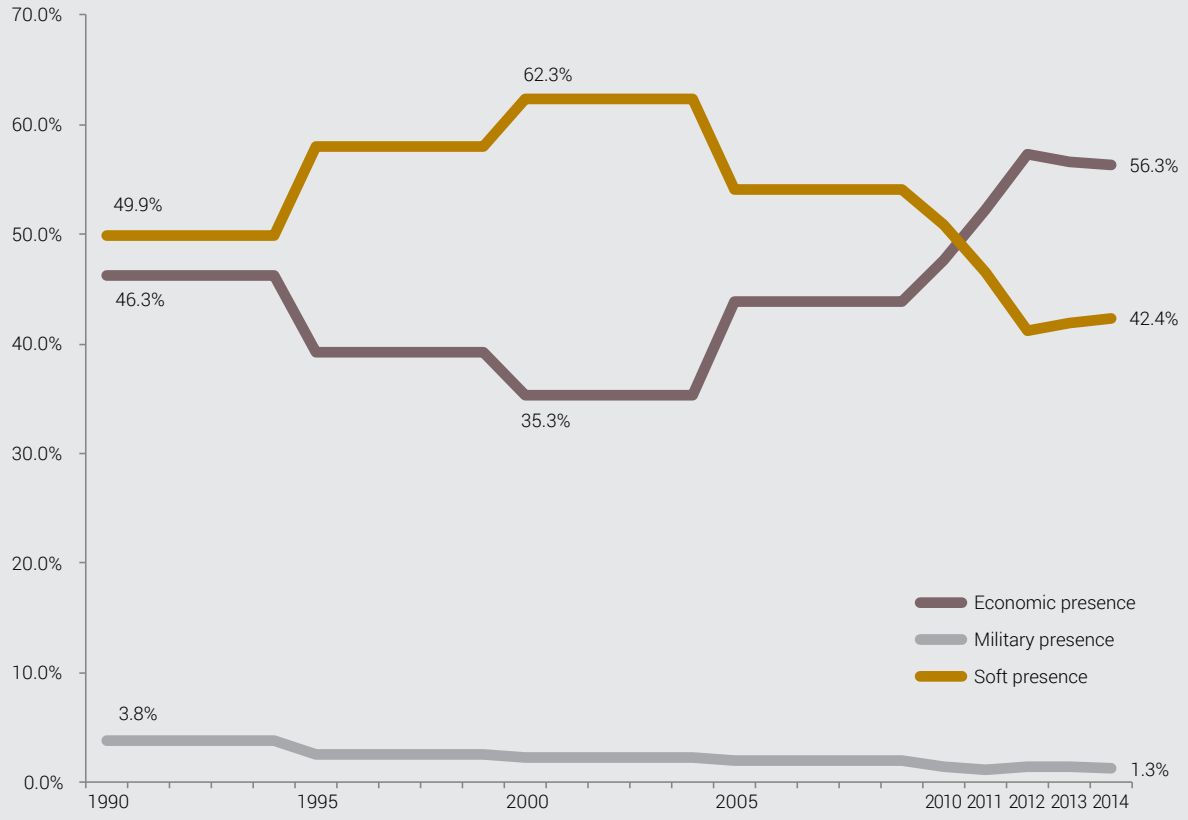
Concerning security, Australia presents in its Strategic Plan a solid commitment to the war against terrorism encouraged by the United States following the 9/11 attacks in New York and Washington D.C.[6]

3 Commonwealth of Australia (2003), 'Advancing the National Interest: Australia's Foreign Policy and Trade White Paper'. Available at: http://australianpolitics.com/foreign/elements/whitepaper.pdf
4 Advancing the National Interest, 25-30
5 Advancing the national Interest, 13.
6 Advancing the national Interest, 13.

Has the nature of Australian external projection progressed according to these strategic positions?

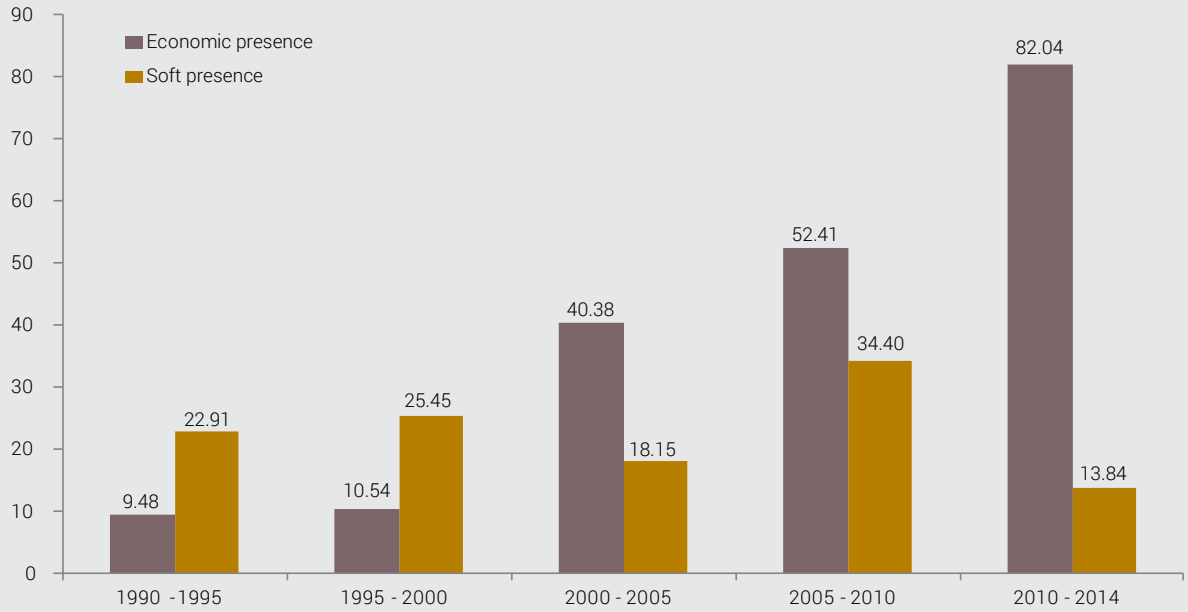
In 2005, two years after the approval of its White Paper, Australia was ranked 12th among the 80 countries now included in the Elcano Global Presence Index. Its profile was at that time built upon the soft dimension (representing a 54.1% of its total global presence), followed by economic (43.9%) and military presence (2%). Five years later, in 2010, Australia maintained the same position, although the economic dimension increased its weight by 3.7 percentage points at the expense of the soft variables and the military, which fell by 3.2 and 0.5 points, respectively. In the latest index (2014), the country drops one position to 13th, reinforcing an observed tendency toward an economy-based external projection profile (graph 5.1). For the first time, Australia's economic dimension exceeded its soft dimension, rising to represent more than half of all the nation's global presence (at 56.3%, to be precise). The contributions related to the military presence continued to decrease, indicating that Australian involvement in the war against global terrorism is not reflected in terms of global presence.

GRAPH 5.1.
Australia's global presence contribution by dimension, 2014 (in %)



This turn toward the economic is also evident when analyzing the index value (graph 5.2). Departing from similar values in 2005 (economic and soft presence indexed at 93.9 and 96.9 points, respectively), the advance in the economic area is remarkable throughout the next 10 years, and by 2014 it has risen to over 228.3, gaining 134.4 points while the soft variable gains only 48.2). The largest expansion of economic variables occurred during the 5-year period 2010-2014, when it outpaced the soft variables set by 68.5 points.

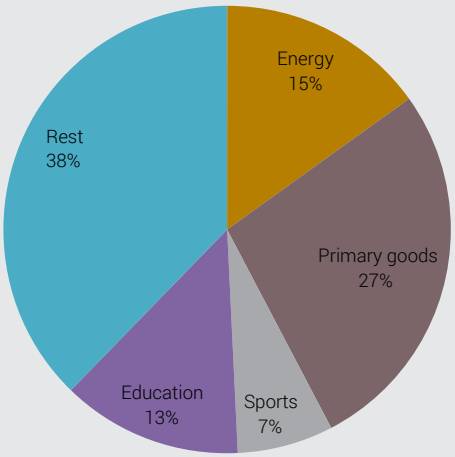
GRAPH 5.2.
Simple variation of economic and soft presence between periods (in index value)



Finally, in terms of Australia's presence within the global scenario, which is to say in direct competition with the other 79 countries included in this index, the share of Australian economic presence increased from 2.0% to 2.3% between 2005 and 2010. This in a context of general expansion of globalization, where emerging economies managed to seize positions previously occupied by the traditional, post-industrial powers (the model here being the case of China).

Regarding those variables that most define the Australian profile beyond its borders, they were in 2005 basically four: education (with a 17.4% contribution), primary goods (17.3%), sports (15.3%), and energy (11.9%). All of these factors became increasingly relevant between 2005 and 2014, although their individual evolutions were distinct. In 2010, the soft dimension variables experienced a slight increase (education to 17.7%) or decrease (sports to 12.6%), while both economic dimensions were enlarged: primary goods rising to 18.8% and energy to 13.9%. This tendency continued into 2014, when primary goods was consolidated as the leading variable with a relative weight of 27% (graph 5.3). Immediately behind this were energy resource exports (at 15%) and, with a drop of 4.5 percentage points since 2005, education (at 13%). Among the variables included in the 'Other' category, the most outstanding were portions of the service sector, practically constant through the 10-year period, and aid cooperation, increasing by a total of 1.6 points.

GRAPH 5.3.
Leading variables contributing to Australia's global presence, 2014 (in %)



In summary, in-depth variable analysis shows an external insertion based on primary goods exports (essentially agricultural products, a strategic sector for this continent/country) and energy resources (also key to Australia's relationships within the Asia-Pacific, its primary area of influence). Attracting more international students to Australia, as a way of establishing bonds with foreign countries, also counts among the country's greatest strengths. In this regard, although Australia's weight in global presence terms of education has lately descended, one must bear in mind its exceptional 'starting point' in 2005, along with the outstanding rise of other economic variables supporting the national strategic goals identified by the White Paper.

Thus our analysis of the index variables on Australian global presence and their evolution since 2005 leads us to conclude that the country has indeed continued on the path laid out by its own strategic foreign-policy document of 2003, joining the dual aspirations of strong international projection and a more prosperous and secure nation.

The South African case: can regional leadership lead to a stronger global influence?

The year 2005 was a turning point for the Republic of South Africa, marking 'the beginning of a second decade under democracy, coinciding with the 50th Anniversary of the proclamation of the Freedom Charter by the People's Congress', as stated in the country's strategic foreign-policy plan for 2005-2008[7] addressing the national vision and goals for the medium term. Revealing a strong inclination to place South Africa in a regional leadership position, with a commitment to the African continent, the country's foreign-policy strategy was assembled around the 'building of a new Africa in which peace and security will endure, moving deeper into democracy and prosperity so the quality of life for African people will keep continuously improving'[8].

7 Department of Foreign Affairs, Republic of South Africa, (2005), 'South Africa Foreign Policy Strategic Plan: 2005-2008', available at: http://www.dfa.gov.za/department/stratplan05-08.pdf
8 South Africa Foreign Policy Strategic Plan: 2005-2008.

When in 2009 the Ministry of Foreign Affairs changed its name to the Department of International Relations and Cooperation (DIRC), this was a strategic move, largely intended to connect the country's national project with what was currently happening in the region around South Africa. A period of reconsideration began, culminating with the composition of a reference document regarding external action: a White Paper under the title of 'Building a Better World: The Diplomacy of Ubuntu'[9], approved by the cabinet and now under parliamentary consideration.

This document reaffirms the basic principles guiding the South African spirit which were expressed in 2005, focusing on respect for other nations, people, and cultures ('the Diplomacy of Ubuntu') and on South-South cooperation, in contrast to colonialism. South Africa's ultimate goal was none other than to prepare the country 'to become a winning nation in the coming decades of the 21st century'[10]. Consequently, the national interest was closely related to the 'stability, unity and prosperity of Africa', specifying that 'South Africa's future global and continental standing will be determined by how South Africa remains true to its enduring values, economic success, and the continued leadership role on the continent'[11]. Clearly, such regional leadership is defined as a mayor strategic goal from which to achieve stronger influence within the global order.

South Africa's self-image was in 2005 that of an influential country within the African continental context, but with an international scope, supported broadly by its principles and values and a competitive, sustainable global economy[12]. Therefore the country's economic diplomacy should lead the government and other agents for external action to try and bring down trade barriers for South African products, to identify and open new markets, and to attract investments and tourism. All this, of course, further implies improvements in the competitiveness of national goods and services, while at the same time the South African reputation as a responsible and stable supplier must remain as ever before. In order to accomplish these targets, some strategic movements have been established which could be roughly summarized as integration (and diversification) in global markets, supporting the country's exports of natural resources, the creation of a more productive business setting, innovation toward facing new market opportunities, and the implementation of measures to attract tourism[13].

9 At http://www.gov.za/documents/white-paper-south-african-foreign-policy-building-better-world-diplomacy-ubuntu
10 Building a Better World, 3
11 Building a Better World, 26.
12 Building a Better World, 18
13 Building a Better World, 26

South African regional leadership in terms of global presence?

South Africa considers its own regional leadership as a solid base for becoming a global influence. However, in considering the global presence rankings, we find that the better-positioned country within the Sub-Saharan African region (including Angola and Sudan) is not South Africa but Nigeria, which has climbed 13 positions to number 36 (since the first index , estimated for 1990). For its part, South Africa now finds itself ranked two positions below Nigeria, in 38th place (table 5.1), while its improvement within the index has been well below Nigeria's, having ascended only 4 positions since 1990. Angola and Sudan appear much further down the list, in the second half of the table, positioned at numbers 54 and 77, respectively.

Considering the presence by dimensions of these two regional leaders in the context of the index, South Africa tops the soft presence ranking, but it is surpassed by Nigeria in both the economic and military dimensions. Still, regardless of whether Nigeria has changed its position in the economic rank, South Africa has fallen 14 positions in this area since 1990. Meanwhile, the opposite has occurred in terms of the soft dimension: South Africa has climbed 10 positions, while Nigeria fell by 11 in the ranking. As for military presence, both African countries have shown an improvement in their positions since the early 1990s.

TABLE 5.1.
Global presence ranking by dimensions for Sub-Saharan Africa, 2014

	Global presence		Economic presence		Military presence		Soft presence	
	Pos. 2014	1990-2014 Variation	Pos. 2014	1990-2014 Variation	Pos. 2014	1990-2014 Variation	Pos. 2014	1990-2014 Variation
Nigeria	36	+12	30	=	26	+29	60	-11
South Africa	38	+3	43	-14	31	+25	36	+10
Angola	54	+9	38	+15	69	-20	80	-10
Sudan	77	-11	75	-5	63	+6	76	-23

On the basis of these global presence rankings, Nigeria and not South Africa is currently in the regional leadership position. However, through in-depth analysis of the nature of the countries' external projection —of the global presence variables and dimensions and how they interrelate— we find grounds for a slightly different interpretation.

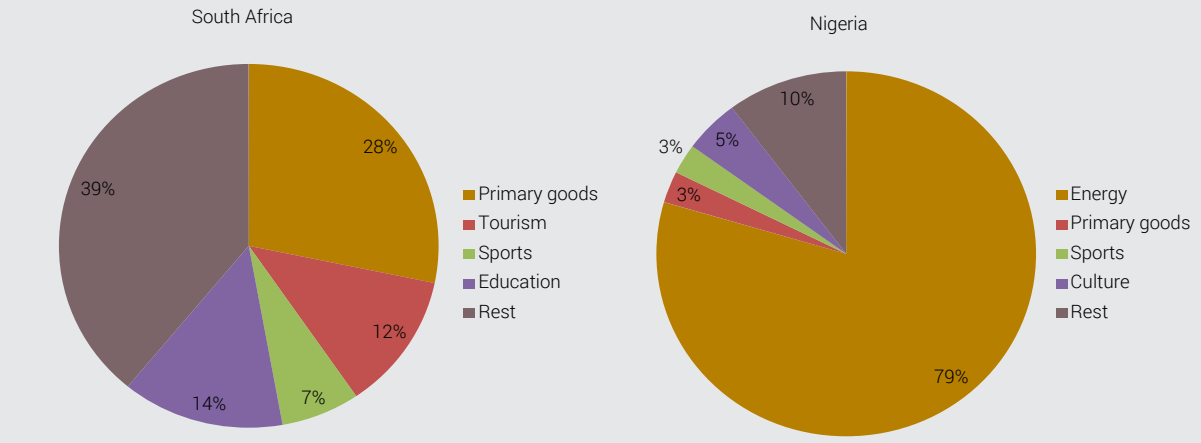
The external projection of the 4 countries of the Sub-Saharan area included in this index rest mainly upon the economic dimension (table 5.2): Angola (with an economic weight of 95.6% over its total global presence), Nigeria (at 84.1%), and Sudan (at 60.3%) are all well ahead of South Africa (51%) in this regard. In terms of the soft and military dimensions, South Africa's percentages are at 47.1% and 1.9%, respectively, compared with Nigeria's 13.3% (soft dimension) and 2.6% (military). Thus Nigerian global presence is very largely based on the economic dimension.

TABLE 5.2.
Sub-Saharan Africa's global presence contribution by dimension, (2014) in %

	Economic presence	Military presence	Soft presence
Nigeria	84.1%	2.6%	13.3%
Angola	95.6%	0.1%	4.3%
South Africa	51.0%	1.9%	47.1%
Sudan	60.3%	1.6%	38.2%

Furthermore, concerning the variables, the ranking shows that Nigeria's global presence (graph 5.4) relies overwhelmingly on energy resources (at 79% of total global presence), with the next most important variable being culture (at just 5%). On the other hand, in the case of South Africa, the variables supporting the nation's international projection are much more dispersed, being chiefly primary goods, education, and tourism but with another 13 variables together representing a significant total of 28%. Thus, the country's profile is much more diversified than Nigeria's, making South Africa not only less dependent on fluctuations in international energy prices but also recalling its stated national project vis-à-vis the global order. The country is placing emphasis on developing the different strategic sectors identified in its White Paper, from exports of primary goods to its ability to attract tourism, as the bases for regional and, in the end, global projection.

GRAPH 5.4.
Nigeria and South Africa's contribution to global presence by principal variables, (2014) in %



In conclusion, Nigeria stands out from the rest of Sub-Saharan Africa due to its improved global presence results. But a detailed analysis of the nature of the international projection of both Nigeria and South Africa, the two regional leaders, shows how South African influence, being based on diversity, constitutes a more solid and sustainable projection. Indeed, this is an international projection and a strategic incorporation firmly connected to the globalization process, not only through the economic dimension but also through other factors including the attraction of international students, tourism, and sports. All of these are soft variables, indicating a sophisticated pattern more suitable to the ever-growing complexity of the international relations scenario in effect since the end of the Cold War.

6. Measuring soft presence through news wire services

Ángel Badillo Matos / Manuel Gracia[1]

Information is one of the central aspects of soft and global presence for the world's countries, and making the right choice about how to assess this element within the Elcano Global Presence Index is a key methodological question. When the index was first designed, the team took a 'hard' (infrastructure) approach, considering installed bandwidth to be an adequate indicator of the ability of every country to produce and distribute the information produced by its media, institutions, or even its citizens within an 'internet 2.0' environment. Since then, we have revisited the information dimension to reconsider the optimal way to reflect the global presence of every country as studied from a 'soft' (content-oriented) point of view.

It is possible to take a systematic measure of explicit references to a given country and its citizens in news spread by media around the world. On the other hand, there is no viable way —and no commercial services available— to search radio or television scripts; but full-text databases offer the ability to elaborate complex search strings through the complete news supply published by newspapers, agencies, or web services. Determining a representative cluster of written media to be analysed in order to assess every country's presence would be extremely difficult. For this reason, we turned to some key information suppliers: global news agencies.

News wire services, or news agencies, are among the least known elements of media systems. First developed during the birth and growth of the popular press in Western countries in the 19th century, these are public or private companies that employ an exhaustive network of offices and journalists gathering information around the world, in order to produce news items (texts, graphics, videos, audio) to be published by newspapers, broadcasters, or digital media, compensating for the inability of most media outlets to afford their own networks of international correspondents. As the main suppliers of news for media companies, news agencies have been particularly relevant in setting international and national agendas and influencing newsrooms around the world; thus they have been perceived as extremely influential soft power institutions for almost two centuries, and among the most relevant actors in the globalization of information.

1 Ángel Badillo Matos, senior analyst and Manuel Gracia, research assistant at Elcano Royal Institute.

Why news agencies? News wires and the geopolitics of information

In the mid-19th century, the advent of the popular press in Europe and the United States and the expansion of telegraphic networks created the right context for the emergence of the first news wire services, providing 'raw material' for nascent newspapers around the globe. Thus was born the Charles-Louis Havas agency in France (1825), Bernard Wolff's agency in Germany (1848), Julius Reuter's financial service on the London Stock Exchange (1851), or Stefani's in Italy (1853), while American newspapers were organized into diverse cooperatives of news production and distribution, the biggest being the Associated Press (1892) and United Press Association (1907)[2].

At a time when most territories outside Europe and America were colonies or protectorates under European sway, three big services (Havas, Wolff, and Reuters) were in control of international news around the world, while new companies —emerging worldwide in response to increasing information demands— were forced to subscribe to collaboration agreements with the 'big three' in order to guarantee the adequate coverage of international events. Nevertheless, 'news agencies were the first electronic mass media organizations to begin operating globally in the first half of the nineteenth century'[3].

The Russian revolution —with the subsequent creation of TASS (1925)— the two world wars, and the Cold War reconfigured the presence and influence of the news wire services, with Reuters, United Press (merged with Hearst's INS in 1958), and Associated Press becoming hegemonic on the Western side (among American allied countries), and with TASS centralizing the information stream in the pro-Soviet countries. Additionally, France took public control of Havas after the war to create the Agence France Presse (AFP); in Civil War-era Spain, Franco merged three pre-existing companies (Fabra, Febus, and Faro) to put the state-controlled Agencia EFE at the centre of his propaganda system. Both had strong influence abroad: the French AFP mostly in Southeast Asia, and EFE in Latin America.

The growth of broadcasting media in the second half of the 20th century increased both the activity and the influence of the news wire agencies as providers of news for hundreds of new media outlets. In the 1960s, the emancipation of many former Western colonies revealed the strong ties of dependency to the central metropolis in terms of information, and many countries decided to launch their own national news agencies, 'translating into action their frustration with international news coverage. […] What they feel chagrined about is the lack of a third world perspective, as well as an appreciation of third world information needs, in the news disseminated by the Western agencies'[4]. These new services were conceived as instruments to disengage national agendas from the influence of international agencies and to set new agendas linked to the strategic interests of the 'non-aligned' third world countries. After an initial period of monopoly by European-based news services (1870-1917) and the rise of the American AP and UPI as strongly influential during the Cold War, this third period has been defined as the 'market domination of the big four', with AP, AFP, Reuters, and UPI as the principal global actors until the 1990s, while national agencies were flourishing

2 UNESCO (1953), *News Agencies: Their Structure and Operation,* UNESCO, Paris.
3 Rantanen, Tehri (2009), *When News Was New*, Wiley-Blackwell, Chichester, United Kingdom and Malden, MA, p. 42.
4 Rosenblum, Mort (1977), 'Reporting from the third world' *Foreign Affairs, July.*

everywhere[5] —promoted by UNESCO strategies for communication and development— to produce local and national news and to counter-balance the exclusive and centralized agenda established by international news wire services. Competition between AP and UPI in the American market ended with the downsizing of the latter and market concentration around the three big contemporary services: Reuters, AFP, and AP.

The last third of the century saw a proliferation of both state-owned and private, both generalist and thematic news wire services, in search of the most profitable markets: in Spain, for instance, the latest 'Media Address Book' (Agenda de la Comunicación) edited yearly by the Government shows the presence of 60 general news wire services. The spectacular transformation of the 'information era' and the universalization of the internet has heavily affected news agencies, although transformation has been slow.

At the beginning of the 21st century, big international news services coexist with smaller national agencies, either state-owned (85% of the total, as shown by Boyd-Barrett) or strongly supported by public funds[6]. In the digital landscape, lines between wholesalers (news wire services) and retailers (the media) are blurring; global concurrence is emerging and conflicts associated with intellectual rights now arise. Nevertheless, news wire services remain the centrepiece of world news circulation, providing raw data or already prepared news items for newspapers, radio, television, and websites worldwide. Even more, the increasing importance of information as a key resource for business has made the news agencies wholesalers of news for banks, merchants, or governmental institutions, beyond their traditional media customers. This explains why in a context of crisis for the traditional press, news wire services are growing and finding new business models and ways to reach new markets[7].

Surprisingly, not much research has been devoted to this particular field in media and information sciences since the debate about international information flows[8] in the 1970s. Only some vague and general data is available about the presence, market, property, or size of the main companies of news wire services. However, some agencies have been recognized as 'global news wire services' by prior studies: the American Associated Press (AP), the British Reuters, the French Agence France Presse (AFP), the Russian ITAR-TASS, the Chinese Xinhua, the Spanish EFE, and, to a lesser extent, the German DPA and the Italian ANSA — the latter three having particular relevance in certain geographic areas.

5 Boyd-Barrett, Oliver, and Rantanen, Tehri (2004), 'News Agencies as News Sources: A Re-evaluation' in Sreberny Annabelle and Chris Paterson (eds), *International News in the Twenty-first Century*, John Libbey Publishing for University of Luton Press, Eastleigh, United Kingdom, pp. 31-46.

6 Boyd-Barrett, Oliver (2010), 'News Agencies in the Turbulent Era of the Internet' in Boyd-Barrett, Oliver (ed.), *News Agencies in the Turbulent Era of the Internet*, Government of Catalonia, Presidential Department, pp. 16-44.

7 The Economist (2009), 'News Agencies: High Wires', *The Economist,* Feb 12th 2009.

8 International Commission for the Study of Communication Problems (1980), *Many Voices, One World: Communication and Society, Today and Tomorrow: Towards a New More Just and More Efficient World Information and Communication Order,* K. Page, London.

TABLE 6.1.
Main news wire services around the world (2014)

Agency	Country	Coverage	Property
Associated Press (AP)	United States	100 countries 280 bureaus	Cooperative (1,500 American newspapers)
Reuters	United Kingdom	131 countries 196 bureaus 2,400 journalists	Private (Thomson Reuters Corp.)
Agence France Presse (AFP)	France	150 countries 200 bureaus 2,260 journalists	State owned
ITAR-TASS	Russia	63 countries 68 bureaus 1,500 journalists	State owned
Xinhua	China	100 countries 106 bureaus	State owned
EFE	Spain	120 countries 181 bureaus 3,000 journalists	State owned
ANSA	Italy	74 countries 77 bureaus	Cooperative (34 Italian media companies)
Deutsche Presse-Agentur (DPA)	Germany	106 bureaus	Cooperative (190 German media companies)

Source: news agencies' corporate websites (2014)

This group of 'global news wire services' control the vast majority of information distributed worldwide in both volume and geographical distribution. Would it be possible to review the international news provided by some of these gathering services to determine the presence of those countries studied in the Elcano Global Presence Index within the most relevant mainstream media? This was the objective of research conducted during the final months of 2014, and some results and discussion are presented below.

Case study: world news through the agencies' eyes

To measure the possibilities of implementing news wire services as data sources for the global presence index, we first selected some of the most relevant to adequately reflect and balance their agendas. To obtain the complete record of the agencies' wires, we used the commercial news database Factiva (www.factiva.com). In addition to the 'big three' (AP, AFP, Reuters), we decided to include the Chinese and Russian national agencies (Xinhua, ITAR-TASS) and to complete the survey with EFE, ANSA, and DPA to guarantee a diversity of sources and to reduce the influence of Reuters/AFP over the sample generated by the volume of items published (table 6.2).

TABLE 6.2.
Proportion of yearly newswire items by service (2012-2014)

News Service	2012	2013	2014
Reuters	33.5%	29.2%	29.7%
AP	43.8%	44.4%	46.0%
AFP (English service)	5.5%	8.4%	6.6%
Xinhua (English service)	1.8%	1.5%	1.1%
ITAR-TASS (English service)	1.9%	2.0%	2.2%
EFE (English and Spanish services)	10.7%	8.9%	9.6%
DPA (International service)	1.2%	3.3%	2.9%
ANSA (English service)	1.7%	2.3%	2.0%

Source: Factiva

Methodologically, we have proposed a stable search string, common to all countries researched, built as follows:

1. The specific use of time period delimitation for each year of the global presence index coverage (January 1st to December 31st).
2. The use of each country's official name in Spanish and English, considering both to be global languages.[9]
3. The use of demonyms in English and Spanish.
4. The combination of all these terms with the boolean operator 'or', to broaden searches including any appearance of the terms.
5. The selection of all English and Spanish newswire services of the mentioned agencies, with the exception of the agency's country of origin (Spain was excluded from the EFE search, the United Kingdom from the Reuters search, the United States from the AP search, etc.).

Thus our analysis units are the news items published by the selected newswire agencies, including every topic and subject (sports, politics, social, etc.). Our research involved 26.8 million news items in total, covering the years 1990, 1995, 2000, 2005, 2010, 2011, 2012, 2013, and 2014 (the time series of the Elcano Global Presence Index).

Presence by countries

The number of news items recovered from newswire sources has evolved from 1.3 million in 1995 to 4.4 million in 2014 (here we exclude 1990, when only Reuters and AP had a digital service available through Factiva). The United States is the most mentioned country in the analysed items (11.4% of the total, and 12.1% of analysed items from the last 5 years, even excluding AP wires). Considering the 80 countries under study, the concentration of news around some is very strong: almost one third of the overall news reviewed refers to the first 6 countries, while 18 countries appear in two thirds of the items studied. Even taking into account repetitions (where one news piece mentions various countries), this concentration is a highly remarkable feature of the results.

9 Spanish is, after Chinese, the most used language in the world, with 414 million speakers living in 31 countries. English is the third most spoken language with 335 million speakers in 99 countries, according to Ethnologue 2014 data. Spanish and English are the most common languages for world news in the agencies studied: all the news wire agencies studied have English services, and only Xinhua and ITAR-TASS do not distribute news in Spanish. Main agencies also offer services in French, Portuguese, and Arabic.

TABLE 6.3.
The 10 countries most cited by news agencies

	Total news items	Total 2010-2014
United States	3,066,253 (excluding AP)	2,224,585 (excluding AP)
Germany	1,309,783 (excluding DPA)	879,006 (excluding DPA)
China	1,172,688 (excluding Xinhua)	860,402 (excluding Xinhua)
France	1,080,376 (excluding AFP)	737,606 (excluding AFP)
Spain	1,064,674 (excluding EFE)	823,049 (excluding EFE)
United Kingdom	1,048,008 (excluding Reuters)	741,248 (excluding Reuters)
Japan	974,240	598,361
Russia	971,005 (excl. ITAR-TASS)	675,130 (excluding Reuters)
India	865,326	614,823
Italy	838,601 (excl. ANSA)	591,270 (excl. ANSA)

Source: Factiva

Recent evolution of informational presence in the news is also relevant. Considering only the last 5 years, certain of the 80 countries reviewed have almost disappeared from international news: Saudi Arabia (-88% in mentions, comparing 2010 with 2014), Iceland (-71%), or the Netherlands (-66%). Meanwhile, others increase their presence dramatically: Iraq (+136%), Russia (+165%), and Ukraine (+665%) have grown exponentially.

TABLE 6.4.
Recent evolution of the presence of some countries in the news

	2010 vs. 2014	2010-2013 average vs. 2014
Saudi Arabia	-88%	-89%
Netherlands	-66%	-69%
Iceland	-71%	-49%
Iraq	+136%	+144%
Russia	+165% (excl. ITAR-TASS)	+122% (excl. ITAR-TASS)
Ukraine	+665%	+513%

Source: Factiva

Taking just the last few years of the time series, some clear overrepresentation can be seen as a consequence of contextual issues. As shown in graph 6.1, the Ukraine-Russia crisis has motivated an exceptional growth in mentions as distributed by news agencies (data for Russia excludes ITAR-TASS newswires).

GRAPH 6.1.
News items distributed by Agencies mentioning Russia and Ukraine (2013-2014)

Note: ITAR-TASS excluded from data for Russia
Source: Factiva

What then will be the influence of this methodological change to the results of the information indicator within the global presence index? Table 6.5 shows the countries' rankings based on the current 'hard' indicator (based on infrastructure) versus an alternative 'soft' information indicator based on news presence, for the first 20 cases. Two surprising cases emerge, as the presence of Spain would rise from 287.43 to 446.07, points whereas that of the European Union would decrease from 1474.43 to 297.70; but many other switches in position show the relevance of this methodological change.

TABLE 6.5.
Information presence rankings based on infrastructure and news

	2013 (existing indicator)		2013 (new indicator)
United States	1642.86	United States	1228.59
European Union	1474.43	Spain	446.07
United Kingdom	1214.29	Germany	442.95
Germany	728.57	China	437.04
France	564.00	United Kingdom	425.24
Netherlands	357.14	France	423.25
Brazil	354.29	Russia	339.04
Japan	334.19	Italy	338.71
Russia	319.06	Brazil	335.74
Italy	300.00	Japan	304.27
Sweden	300.00	India	298.68
Spain	287.43	European Union	297.70
Canada	285.71	Mexico	288.70
China	198.50	Canada	265.03
Singapore	180.87	Argentina	247.15
Romania	170.00	Australia	243.56
Belgium	157.14	United Kingdom	213.42
Switzerland	157.14	Switzerland	165.95
Luxembourg	151.43	South Africa	148.03
Turkey	150.31	Israel	147.08

Once balanced with the other elements considered in the global presence index, the result of a first implementation of an information indicator as described would be as shown in table 6.6 (for the top 20 cases).[10] The 4 positions that would change among these 20 have been marked with an asterisk; but many other changes would occur among positions 21 to 80 in the ranking.

10 The data used corresponds to Elcano Global Presence Index 2013

TABLE 6.6.
Effect of information indicator changes on the overall index

Global presence 2013			2013 new
United States	1041.7	United States	1016.9
Germany	386.1	Germany	368.9
United Kingdom*	367.8	China*	348.7
China*	334.4	United Kingdom*	320.5
France	308.2	France	299.8
Russia	281.0	Russia	282.2
Japan	241.7	Japan	254.4
Netherlands*	212.7	Canada*	202.4
Canada*	203.6	Netherlands*	199.8
Italy	172.4	Italy	174.7
Spain	164.4	Spain	173.9
Saudi Arabia*	158.4	Australia*	163.5
Australia*	156.6	Saudi Arabia*	157.8
Republic of Korea	137.6	Republic of Korea	138.6
Belgium	134.8	Belgium	131.0
India	113.9	India	125.0
United Arab Emirates	109.7	United Arab Emirates	111.2
Singapore*	109.4	Brazil*	104.9
Brazil*	106.0	Singapore*	104.8
Switzerland	100.4	Switzerland	100.9

The results show relevant and remarkable findings in terms of this indicator's impact on the global presence index, although some factors should be considered for the eventual substitution of the information variable.

a. The effect of the implementation of the new source is important, even if moderate, due to the complex and diverse corrections on the weight of each variable to calculate the index, and it produces changes amid even the first cohort of 20 countries. Further research should be devoted to determining the adequate balance between data on infrastructure (the old hard variable) and news presence (the new soft one) to build the information indicator of the index.

b. The lack of available data on the number, size, and total production of news items by international agencies should be considered a weak point of this experiment. The number and geographical distribution of customers of each news service should be also considered as a relevant variable to adequately determine the most influential institutions in terms of global presence over news outlets.

c. Are Western countries overly represented in the newswire items, but not in the media news that is finally delivered? There is no way to determine this without an exhaustive review of media content around the globe. The use of agency news is, therefore, strongly marked by the fact that we are measuring only the news supply delivered by wholesalers, and not the effective news pieces offered by information retailers to citizens. Also, the volume of information produced by Reuters and AP has to be taken into account. Probably only specific search strategies per country, per year, and per news agency could counteract the content inflation of the 'big three' agencies, by offering proportional data about the presence of each country in each news stream. Even excluding the country of origin of each company, the raw data offered in this first exploratory paper shows that an excessively 'Western perspective' could be part of the aggregate sum of news pieces provided by the agencies.

d. The volume of news items retrieved makes it less than viable to consider the possibility of a qualitative technique to ponder the presence of non-relevant news items. Some technical solutions should be evaluated to complement the quantitative analysis with some qualitative studies applied over the sample.

METHODOLOGICAL ANNEX

The methodology of this 2014 edition of the Elcano Global Presence Index mainly replicates that of the previous edition (Olivié *et al.*, 2014), which was itself the result of a process of methodological discussions initiated in 2008.

The first version of the Index, published in 2011, ranks 54 countries according to their 2010 global presence (Olivié and Molina, 2011)[1]. That edition and, therefore, the design of the Index itself, was coordinated by Ignacio Molina and Iliana Olivié –both senior analysts at the Elcano Royal Institute– and was the result of nearly three years of methodological discussions. These discussions were conducted in the framework of a working group composed by the above-mentioned coordinators of the Index, Narciso Michavila and Antonio Vargas (from GAD3), Émêrson Correa (Olympus Consulting), several Elcano senior analysts and other staff members (Félix Arteaga, Carola García-Calvo, Carmen González, Jaime Otero, Juan Antonio Sánchez, and Federico Steinberg), and external experts (Alfredo Arahuetes (Pontificia University of Comillas), Ángel Badillo (University of Salamanca, currently also senior analyst at Elcano Royal Institute), José Fernández Albertos (Spanish National Research Council – CSIC), and José Ignacio Torreblanca (ECFR Madrid)). We also received methodological suggestions from Philip Purnell (Thomson Reuters), Santiago de Mora-Figueroa, Marqués de Tamarón (Ambassador of Spain), Teresa G. del Valle Irala (University of the Basque Country), Ángel Vilariño (Complutense University of Madrid), Cristina Ortega, Cintia Castellano, and Amaia Bernara (from the FECYT of the Ministry of Science and Innovation).

The 2011 edition of the Index[2] included a re-designing of the military equipment variable. This methodological change, led by Félix Arteaga, was based on previous methodological discussions with several experts on that field: Francisco Asensi (Ministry of Defense), Alberto de Blas (Ministry of Defense), Amador Enseñat (Ministry of Defense), Dagmar de Mora-Figueroa (NATO), Pablo Murga (Ministry of Defense), Diego Ruiz Palmer (NATO), Andrés Sanz (Ministry of Defense), Steven R. Sturn (NATO), and Federico Yaniz (Ministry of Defense).

For the design of both the Elcano European Presence Index, an initiative led by Manuel Gracia, and the calculation of the European Union's global presence, several external experts were consulted anew: Alfredo Arahuetes, Marisa Figueroa (ECFR Madrid), Narciso Michavila, and José Molero (Complutense University of Madrid).

Moreover, the project and its methodology have been presented to and discussed with the Institute's Board of Trustees, the Executive Committee, the Media Committee, the Management Committee, and, on several occasions, the Institute's Scientific Council. We have also received useful comments and suggestions over the years, as a result of numerous meetings to present and discuss progress on the Index. At the national level, these discussions have taken place with members of the Spanish Parliament (2011), officials from the ministries of Foreign Affairs and Cooperation (2011) and of Economy (2011), analysts and officials from the Presidency of the Government (2011), experts from Accenture Spain (2013),

1 Olivié, Iliana and Ignacio Molina (2011), 'Elcano Global Presence Index', *Estudio Elcano* Nº 2, Elcano Royal Institute.
2 Olivié, Iliana and Ignacio Molina (coord.) (2012), 'Measuring the International Presence of Countries. The Elcano Institute's IEPG Index Methodology Revisited', *Working Paper WP* 9/2012, Elcano Royal Institute.

and members of the Central Bank of Spain (2014). The Index has also been presented to foreign diplomats based in Madrid (twice in 2014) and discussed at the Matías Romero Institute in Mexico (2011), and at the GIGA Institute in Hamburg (2011).

Lastly, throughout the life of the project, the final calculation of the Index has been made possible thanks to the generous aid provided in data-gathering by several people and institutions: Ángel Aguado (EFE), Barbara d'Ándrea (World Trade Organization), Bruno Ayllón (Complutense University of Madrid), Gordan Bosanac (Centar za mirovne studije, Croatia), Chiao-Ling Chien (UNESCO), José Miguel Cortés (Spanish Ministry of Economy), Rafael Domínguez (University of Cantabria), Katie Jost (GAD), Guillermo Kessler (Spanish Ministry of Economy), Carlos Latorre (Spanish Agency for International Development Cooperation), Luis Martí (Spanish Ministry of Economy), Salvador Maspoch (Spanish Ministry of Foreign Affairs and Cooperation), Fernando Mier (Spanish Ministry of Economy), Ramón Molina (Spanish Ministry of Foreign Affairs and Cooperation), Manuel Moreno (Spanish delegation to the United Nations and other international organizations based in Geneva), Moisés Pérez (Spanish Ministry of Economy), Arantxa Prieto (WTO), Juan Pita (Spanish Agency for International Development Cooperation), Rosario Pons (EFE), Philip Purnell and Sébastien Velley (Thomson Reuters), Robert Robinson (Universidad Pontificia de Comillas), Ventura Rodríguez (Spanish Agency for International Development Cooperation), Pep Ruiz (BBVA Research), Verónica Samper (Spanish Ministry of Economy), Manuel Sánchez (Spanish Ministry of Economy), Patrick Sandoval (Spanish Ministry of Foreign Affairs and Cooperation), Pedro Sosa (Spanish Ministry of Foreign Affairs and Cooperation), Gabriele Schwarz (Spanish Ministry of Economy), José Tregón (Spanish Ministry of Economy), Bibian Zamora (Spanish Ministry of Foreign Affairs and Cooperation), María Pilar Zaragüeta (EFE), and Ann Zimmerman (OECD).

Main elements of the Elcano Global Presence Index

This year's edition covers the global presence of a selection of 80 countries. The selection includes the first 75 world economies according to World Bank data (nations with the highest GDP in current US dollars in 2013) as well as countries that are smaller in their economic size but are members of the Organisation for Economic Cooperation and Development (OECD) and/or the European Union (table A.1). For this 2014 edition, 10 new countries have been added to the selection. These are Azerbaijan, Belarus, Cuba, Ecuador, Libya, Morocco, Oman, Sri Lanka, Sudan, and Syria.

Table A.1. Countries listed in the Elcano Global Presence Index

Algeria	Ecuador	Libya	Russia
Angola	Egypt	Lithuania	Saudi Arabia
Argentina	Estonia	Luxembourg	Singapore
Australia	Finland	Malaysia	Slovakia
Austria	France	Malta	Slovenia
Azerbaijan	Germany	Mexico	South Africa
Bangladesh	Greece	Morocco	Spain
Belarus	Hungary	Netherlands	Sri Lanka
Belgium	Iceland	New Zealand	Sudan
Brazil	India	Nigeria	Sweden
Bulgaria	Indonesia	Norway	Switzerland
Canada	Iran	Oman	Syria
Chile	Iraq	Pakistan	Thailand
China	Ireland	Peru	Turkey
Colombia	Israel	Philippines	Ukraine
Croatia	Italy	Poland	United Arab Emirates
Cuba	Japan	Portugal	United Kingdom
Cyprus	Kazakhstan	Qatar	United States
Czech Republic	Kuwait	Republic of Korea	Venezuela
Denmark	Latvia	Romania	Vietnam

Finally, in terms of country selection, bear in mind that by making calculations at time intervals that go back to 1990, the intention of the project is to show the 'two-bloc world', even if in decline. Thus, Russia's 1990 values refer to those of the Soviet Union, those of Germany to the German Federal Republic, those of the Czech Republic to Czechoslovakia. Moreover, East European countries that became independent after 1990 have no value assigned in that year. This is the case for Azerbaijan, Belarus, Estonia, Latvia, Lithuania, Kazakhstan, and Ukraine as part of the Soviet Union, Slovakia as part of Czechoslovakia, and Croatia and Slovenia as part of Yugoslavia.

The variables, indicators, and sources for this 2014 Elcano Global Presence Index are the same as for the previous edition (table A.2). Several criteria guided the selection of these variables. First, presence is reflected in a single direction, or what could be deemed its unidirectionality. Second, the results of presence are measured, and not the means or assets needed to achieve these results. In addition, all the variables have an explicitly external component, in the sense that they reflect cross-border presence. Presence is given in absolute and not relative terms; in other words, the indicators are not proportional to the demographic or economic size of the country. Likewise, as for any other index, the best explanatory capacity is sought with the fewest number of variables or indicators possible. Finally, hard data on presence are taken, and not data based on perceptions or opinions. For more details on the debates and criteria that guided this selection, see Olivié and Molina (2011 and 2012).

Obviously, the three dimensions –economic, military, and soft presence– do not contribute to the global presence of countries in the same way, but it is rather complicated to assign a specific weight to each of them, as well as to each indicator of the respective areas. That is why, in defining the weightings of each of the elements included in the index, we decided to

conduct a survey with a panel of experts in international relations. The panel was selected and consulted in early 2012, based on the think tanks report published annually by the University of Pennsylvania,[3] including a total of 150 centers involved in international relations. The details of this selection and of the design of the questionnaire are specified in previous editions of this report (see, for instance, Olivié *et al.*, 2014). The weighting factors obtained from this consultation are included in table A.3.

Table A.2. Variables, indicators, and sources of the Elcano Global Presence Index

Indicator	Description	Source
Economic presence		
Energy	Flow of exports of energy products (oil, refined products and gas) (SITC 333, 334, 343)	UNCTADStat
Primary goods	Flow of exports of primary goods (food, beverages, tobacco, agricultural commodities, non-ferrous metals, pearls, precious stones, and non-monetary gold), excluding oil (SITC 0 + 1 + 2 + 4 + 68 + 667+ 971)	
Manufactures	Flow of exports of manufactured goods (chemical products, machinery, transport equipment, other manufactured products) (SITC 5 to 8 minus 667 and 68)	
Services	Flow of exports of services in transport, construction, insurance, financial services, IT, the media, intellectual property, other business services, personal, cultural and leisure services, and public services	
Investments	Stock of foreign direct investment abroad	
Military presence		
Troops	Number of military personnel deployed in international missions and bases overseas	IISS – The Military Balance Report
Military equipment	Weighted sum of aircraft carriers, big ships, destroyers, frigates, nuclear-powered submarines, amphibious ships, medium and heavy strategic aeroplanes, and air tankers	
Soft presence		
Migration	Estimated number of international immigrants in the country at mid-year	United Nations Population Division and OECD
Tourism	Thousands of arrivals of non-resident tourists at borders	United Nations World Tourism Organization (UNWTO) – Statistics Database
Sports	Weighted sum of points in the FIFA world ranking and medals won at summer Olympic Games	FIFA and IOC
Culture	Exports of audiovisual services (cinematographic productions, radio and television programs, and musical recordings)	WTO – International Trade Statistics
Information	Internet bandwidth (Mbps)	International Telecommunication Union
Technology	Foreign-oriented patents: number of inter-related patent applications filed in one or more foreign countries to protect the same invention	World Intellectual Property Organization (WIPO) – Statistics Database
Science	Number of articles, notes, and reviews published in the fields of the arts and humanities, social sciences, and sciences	Thomson Reuters – Web of Knowledge
Education	Number of foreign students in tertiary education on national territory	UNESCO – Institute for Statistics, OECD – iLibrary
Development cooperation	Total gross flows of official development aid or comparable data	OECD – International Development Statistics and Development Co-operation Report 2010 (DAC countries), official national sources

3 James G. McGann (2012), 'The Global Go To Think Tanks Report 2011. The Leading Public Policy Research Organizations in the World', *Final United Nations University Edition,* January.

Table A.3. Weighting factors of the different areas and indicators

Dimension	Variable	Weighting factor (%)
Economic presence		**38.50**
	Energy	6.95
	Primary goods	5.13
	Manufactures	7.44
	Services	8.88
	Investments	10.10
Military presence		**15.52**
	Troops	7.95
	Military equipment	7.57
Soft presence		**45.98**
	Migrations	4.11
	Tourism	4.10
	Sports	3.42
	Culture	6.98
	Information	5.99
	Technology	5.82
	Science	5.71
	Education	5.45
	Development cooperation	4.40

In this 2014 edition, 1,393 cases have been estimated. Thus the proportion of missing and estimated cases represents only 4.9% of a database of more than 28,000 observations. Again, the hotdeck method has been used for these estimations.

This year, as for previous editions, the performance of the variables is assumed to be linear with the exception of the sports variable. Neither do the limits of the scales vary, minimum (theoretical null (0) presence) or maximum (maximum presence registered in the series in 2010). It should be noted that when adding data for this new 2014 edition, a review of figures corresponding to previous years was also conducted, on the basis of data availability in each source. As a result, some records for past few years (including 2010) have changed, thus modifying the maximum value that is referenced in the 0-1000 scaling. Furthermore, in this edition, we have incorporated estimations for the variable Migrations and for years 2010 to 2014. More precisely, we have calculated the annual variation of migrants according to OECD data (and for OECD member states) and applied this variation rate to original data by United Nations Population Division. This has allowed for some dynamism in the variable which is not possible with the data source (calculated once every 5 years) used in this variable.

Moreover, the inclusion of new countries systematically affects the index values for the variables that are built on the existing spatial sample. This is the case for sports and military equipment, where the addition of new countries to the index leads to a lower record for each of the 80 countries.

The inclusion of the European Union in the Elcano Global Presence Index

One of the new features of 2012's edition was the composite calculation for the 27 European Union member States. This was undertaken in order to try to quantify the global projection of the Union, as if it were a political and economic union with its own identity.

Foreign presence of the European Union is measured starting in 2005 and considering that the varying composition of the Union should be reflected in the index. Both the Union's global presence and the Union as the sphere of external projection calculated in the European Presence Index do change with every new enlargement, and this is a phenomenon that reflected by both indexes. As a consequence, the Union's presence corresponds to that of the 25 members in 2005, 27 members from 2010 to 2012, and 28 members in 2013 and 2014.

Moreover, to measure the European Union's presence in the world, the same variables used in the Elcano Global Presence Index calculations for the rest of the countries must always be maintained. For each of these variables and for each European country, the intra-European and extra-European flows must be differentiated, since a mere totaling of the results of each member state would also record their projection into other member states (e.g. consider the intra- and extra-European trade in German goods). This distinction between flows has been made feasible by using additional sources of data which differ from those used for the global presence index, and especially Eurostat (table A.4).

Table A.4. Variables, indicators, and sources of the Elcano Global Presence Index calculated for the European Union

Indicator	Description	Source
Economic presence		
Energy	Extra-EU flows of exports of energy products (oil, refined products, and gas) (SITC 333, 334, 343)	Eurostat
Primary goods	Extra-EU flows of exports of primary goods (food, beverages, tobacco, agricultural commodities, non-ferrous metals, pearls, precious stones, and non-monetary gold), excluding oil (SITC 0 + 1 + 2 + 4 + 68 + 667+ 971)	
Manufactures	Extra-EU flows of exports of manufactured goods (chemical products, machinery, transport equipment, other manufactured products) (SITC 5 to 8 minus 667 and 68).	
Services	Extra-EU flows of exports of services in transport, construction, insurance, financial services, IT, the media, intellectual property, other business services, personal, cultural and leisure services, and public services	
Investments	Stock of foreign direct investment outside the EU	
Military presence		IISS – The Military Balance Report
Troops	Number of military personnel deployed in international missions and bases outside the EU	
Military equipment	Weighted sum of aircraft carriers, big ships, destroyers, frigates, nuclear-powered submarines, amphibious ships, medium and heavy strategic aeroplanes, and air tankers	
Soft presence		
Migration	Estimated number of immigrants from outside the EU	United Nations Population Division and Eurostat
Tourism	Thousands of arrivals of tourists from outside the EU	Statistics database of the United Nations World Tourism Organization (UNWTO) and Eurostat
Sports	Weighted sum of points in the FIFA world ranking and medals won at summer Olympic Games for each EU member state Corrective variable: European audience at the World Cup Final and the opening ceremony of the Olympic Games	FIFA and ICO Reports by Kantar Media and Nielsen
Culture	Extra-EU exports of audiovisual services (cinematographic productions, radio and television programs, and musical recordings)	Eurostat
Information	Maximum internet bandwidth (Mbps) in the EU installed in a member state	International Telecommunication Union
Technology	Foreign-oriented patents for the total EU member States: number of inter-related patent applications filed in one or more foreign countries to protect the same invention Corrective variable: patents registered for each member state in other member States	World Intellectual Property Organization (WIPO) – Statistics Database
Science	Number of European articles, notes, and reviews published in the fields of the arts and humanities, social sciences, and sciences	Thomson Reuters – Web of Knowledge
Education	Number of non-EU foreign students in tertiary education in the EU	UNESCO – Institute for Statistics, OECD – iLibrary and Eurostat
Development cooperation	Total gross flows of official development aid for all member States	OECD – International Development Statistics and Development Co-operation Report 2010 (DAC countries)

Another new feature of 2012's edition was the incorporation of a measure of the presence of the individual member states within the Union itself: the Elcano European Presence Index. To some extent, methodologically, this indicator is the flip-side of the Global Presence Index for the European Union. In a similar way to the latter, it shows the cross-border presence of the member states, which in the case of the Elcano European Presence Index is limited to the European (and not global) space. It facilitates a comparative analysis of the current situation and recent evolution of the positioning of European countries within the Union. It can also provide relevant information on the position of the member states in the calculation of their European as well as their global presence. The Elcano European Presence Index aims to be an Elcano Global Presence Index on a European scale, so the structure and methodology of the latter index have been respected as far as possible, although some slight modifications have occasionally proved essential. Thus, in general terms, the calculation of European presence modifies the calculation of global presence by reducing the measures of presence on a global scale to the intra-European scale (for example, intra-European migration flows, exports to the rest of the European Union, or European foreign students). It almost always does so by using Eurostat data, just as for the calculation of the global presence of the European Union. Obviously, the change in scale also reduces the scaling: the value of 1,000 assigned to the maximum indicator of the 2010 series in the Elcano Global Presence Index is given, in the case of European presence, as the maximum value registered in 2010 by a member state and for the intra-European presence series. Finally, just as in the index for the European Union, the reference area for which European presence is measured is the Union as it has been composed in different moments of time, variations being the result of the enlargement process.

The contribution of each member to the European Union's Global Presence

For the first time, we have calculated in this edition the contribution of each member state to the European Union's global presence. This way, the Elcano Global Presence Index allows one to approach the presence of the European Union from three different perspectives: the European Union in relation to the world scene (the global presence index of the European Union), the projection of member States within the European Union (the European presence index) and, finally, linking local and global spheres, the contribution of these member states to the external projection of the European Union.

In methodological terms, this implies a breakdown by member state of each variable used for the calculation of the European Union's global presence, as well as taking into account the varying nature of this territory (25 countries in 2005, 27 in 2010-2012, and 28 since 2013). This breakdown means obtaining the relative weight or contribution of each country to every presence variable that defines the index.

In most cases this was easily done on the basis of Eurostat data, with the exception of the sports and information variables, given their global nature. In the case of sports, we have considered that the projection outside the communitarian space is 70% of total global projection. That same proportion is used for calculating the European Union's global presence in this variable, on the basis of audience records from the World Cup final and

the opening ceremony of the Olympic Games. As for information, given the indivisibility of the indicator, we have distributed the values of internet bandwidth according to another variable, the percentage of households with internet access in each country.

For several other variables, the contribution of each member state was assessed on the basis of the calculation of the European Union's external projection, so it was easily transformed into a share (table A.4). This is the case for troops, military equipment, science, and development cooperation.

The contribution of autonomous communities to Spain's global presence

In the same vein of connecting local and global dimensions of economic, social, and political projection, we have further calculated the relative contribution of each of the 17 autonomous communities, and the cities of Ceuta and Melilla, to Spain's global presence for the 2005-2013 period. As with the contribution of member states to the European Union's global presence, the methodology (structure and indicators) follows that of the Elcano Global Presence Index.

It was in this case necessary to rely on different sources from those used for either the global or the European presence index. More specifically, these contributions were calculated by building on official databases from Spain.

For many indicators, it was possible to calculate the value using exactly the same indicator used for the presence index. In these cases, the geographical distribution of Spanish presence was assessed strictly on the basis of those figures – and the methodology of national sources. In some other cases, disaggregated data by region were not available, or the variable did not easily admit a regional breakdown.

Economic presence

Data on exports of energy, primary goods, and manufactures by Spain's communities were obtained from Datacomex. The source for the investments variable is Datainvex. Both sources belong to the Secretariat of State for Trade, an organism of the Spanish Ministry of Economy and Competitiveness.

Surprisingly, despite the specialization of the country in the production and exports of services, information on exports of services by region is not available from official sources. Different institutions were consulted: the *Instituto Nacional de Estadística*, the Ministry of Economy and Competitiveness, the Finance Ministry, the central bank (Banco de España) and the research division of BBVA. But data could not be gathered. Some institutions provide data on exports of some services (tourism or transportation, for instance). Also, information on exports of goods by companies whose core business is located in different services sub-sectors is available from some sources. However, none of these figures reflect the projection of Spain by region in this dimension. Therefore, this variable was calculated with a proxy, which is the GDP of the services sector disaggregated by communities, according

to the *Instituto Nacional de Estadística.* Still, given that an important share of services might not be tradable, we have excluded certain categories that are more likely to be non-tradable. These are the categories classified in codes 84 to 98, following NACE classification, such as public administration and defense services, or education, health, and social work activities. Nonetheless, this methodological decision implies that we are assuming that all communities have the same export orientation in their services sectors – a flaw that could be corrected if official data on exports of services were available.

It should be noted that official sources assign exports and investments by region according to the fiscal identification code of companies. This results in an important 'headquarter effect' that assigns a great deal of economic activity to the biggest communities, where companies tend to establish their headquarters even if they export and/or invest from different parts of the country.

Military presence

From a conceptual point of view, the variables of troops and military equipment cannot be easily divided by regions. As for military equipment, this is obvious, as there is no specific contribution by different regions to, say, aircraft carriers or air tankers. In the case of the troops deployed, there is not necessarily any connection between the specific geographical origin of military personnel deployed outside Spain and the town or village where the quarter of origin is located. In other words, both the distribution of military quarters throughout the Spanish geography and the international deployment of troops from different quarters depend on the specific needs of the Ministry of Defence, and not on the place of origin of the personnel.

The intrinsic state dimension of military presence has led us to determine each region's contribution to this modality of presence on the basis of the extent to which every autonomous community finances the state as a whole. More specifically, we have considered that military presence can be broken down into different regions according to the share of national taxes collected by each of the autonomous communities. These shares were calculated on the basis of data from the *Agencia Estatal de Administración Tributaria.* Moreover, we have applied a two-year lag, considering that this could be considered the lapse of time required for new financing to be translated into new military capacities.

Soft dimension

Data on the flow of immigrants and on the arrivals of tourists to the autonomous communities are provided by the *Instituto Nacional de Estadística* (INE). In the case of tourism, these figures are originally provided by the *Instituto de Estudios Turísiticos* (IET), a branch of the Ministry of Industry, Energy and Tourism. As for patents, which we use to calculate the technology variable, disaggregated data are available from the *Oficina Española de Patentes y Marcas,* also located within the Ministry of Industry, Energy and Tourism; patents are assigned geographically to the community of origin of the first applicant. The source for science –the number of academic publications in indexed journals– is the Scopus database provided

by the *Fundación Española de Ciencia y Tecnología* (FECYT). In the case of the education variable, information on foreign students in tertiary education are provided by the Ministry of Education, Culture and Sports.

As for sports, the criterion for assigning Olympic medals and FIFA points to different communities was the athletes' place of birth. In consideration of collective sports modalities, we have assigned one medal to each member of the team (in the case of couples) when members do not belong to the same community. For teams of three or more people, the medal is recorded for the autonomous community that is the place of origin of the majority of members. If there is no clear origin within a specific community (if members are equally widespread across different communities), the medal is not assigned.

As culture is measured with the exports of audiovisual services, and given that statistics on services are not available by autonomous communities, we have had no choice but to rely on a proxy. In a similar vein to the variable for services, the proxy for culture is the number of film production companies within each of the autonomous communities, according to data provided by the *Instituto de Cinematografía y de las Artes Audiovisuales* of the Ministry of Education, Culture and Sports. We use this distribution as a proxy for weighting each community in the total Spanish presence on culture.

Regarding the information variable, as with the calculation of the European Union's global presence by member states, the indicator on international internet bandwidth has been replaced by the number of households with internet access, by autonomous community. These data were provided by a survey, the *Encuesta sobre Equipamiento y Uso de Tecnologías de la Información y la Comunciación de los Hogares*, conducted by the *INE*.

Finally, in the case of development cooperation, we have added the specific contributions of autonomous communities and towns to official development assistance (ODA) –known as decentralised cooperation– to the breakdown of ODA by the central administration, following the same criterion of contribution to general budget that we used for the military dimension. Regarding ODA channelled by towns, we have only taken into account the top 20 contributions by volume. The sources for ODA figures are different editions of the *Plan Anual de Cooperación Internacional* (PACI) published yearly by the Ministry of Foreign Affairs and Cooperation.

Table A.5. Variables, indicators, and sources for calculating Spain's global presence by autonomous communities

Indicator	Description	Source
Economic presence		
Energy	Flow of exports of energy products (oil, refined products, and gas) (SITC 333, 334, 343)	Datacomex, Ministry of Economy and Competitiveness
Primary goods	Flow of exports of primary goods (food, beverages, tobacco, agricultural commodities, non-ferrous metals, pearls, precious stones, and non-monetary gold), excluding oil (SITC 0 + 1 + 2 + 4 + 68 + 667+ 971)	
Manufactures	Flow of exports of manufactured goods (chemical products, machinery, transport equipment, other manufactured products) (SITC 5 to 8 minus 667 and 68)	
Services	Gross added value at market prices (NACE rev 2 45-63 and 64-82)	*Instituto Nacional de Estadística*
Investments	Stock of foreign direct investment abroad	DataInvex, Ministry of Economy and Competitiveness
Military presence		
Troops	Tax collected by the general government distributed by administrative agent	*Agencia Estatal de la Administración Tributaria* (AEAT)
Military equipment		
Soft presence		
Migration	Annual flow of foreign immigrants	*Instituto Nacional de Estadística*
Tourism	Thousands of arrivals of non-resident tourists at borders	*Instituto de Estudios Turísticos* (IET), Ministry of Industry, Energy and Tourism
Sports	Weighted sum of points in the FIFA world ranking and medals won at summer Olympic Games	FIFA and IOC
Culture	Number of film production companies	*Instituto de Cinematografía y de las Artes Audiovisuales,* Ministry of Education, Culture and Sports
Information	Number of households with internet access	*Instituto Nacional de Estadística*
Technology	Foreign-oriented patents: number of inter-related patent applications	*Oficina Española de Patentes y Marcas* (OEPM), Ministry of Industry, Energy and Tourism
Science	Number of articles published in the fields of the arts and humanities, social sciences, and sciences	Scopus, *Fundación Española de Ciencia y Tecnología* (FECYT)
Education	Number of foreign students in tertiary education	Ministry of Education, Culture and Sports
Development cooperation	Tax collected by the general government distributed by administrative agent and total gross flows of official development aid	*Agencia Estatal de la Administración Tributaria* (AEAT) Ministry of Foreign Affairs and Cooperation

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