

ELCANO GLOBAL PRESENCE REPORT



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ELCANO GLOBAL PRESENCE REPORT 2016

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Executive summary

China jumps to second position while Europe stagnates

China has climbed 2 positions in only one year. It is now, after the United States, the 2nd-ranked country with the highest global presence in index value terms. Following an exceptional up-scaling last year, the United Kingdom falls to the 4th position, behind Germany which is now 3rd. In general terms, European countries continue to lose pace and, as a result, this year's global presence for the European Union has decreased (from 1,261 points in 2014 to 1,255 in 2015).

Resource-rich countries (like Brazil) and, particularly, energy-rich economies are affected by the collapse of commodities prices. As a result, Russia, Libya, the Netherlands, Norway and the United Arab Emirates all lose at least 6 positions in the 2015 global presence ranking with respect to the previous year.

Does this mean the world is de-globalizing?

The added value of global presence of all 90 countries for which this Index is calculated represents what might be described as the foreign policy space. After decades of rapid growth (at an annual average of 10% between 1990 and 2012), growth of this space has slowed down (2.7% between 2012 and 2015) and now seems to have stagnated (after an almost negligible increase of 0.4% between 2014 and 2015).

This slowing down is mainly the result of a stagnating economic dimension and, surprisingly, of emerging countries losing global presence in absolute terms (with the exceptions of China and India).

As a consequence, after years of increasingly disperse global presence, we are now seeing a re-concentration of external projection. The quintile of countries with the highest value of global presence (18 countries) has slightly increased its quota from 66% in 2013 to 67% in 2015, after a dramatic fall from 78% in 1990.

Re-weighting the foreign policy space

The Elcano Global Presence Index is the result of adding together 16 variables of external projection. These are aggregated according to the criteria of experts in international relations, consulted in 2011 and again in 2012. In 2015, experts were consulted anew. The results of this survey show the extent to which foreign policy specialists have changed their worldview. The world now looks 'harder' than it did in 2012, with an increase of 5.9 percentage points in the weight assigned to the economic dimension, and 8.3 additional points for military presence.

Table 0. Frequently asked questions about the Elcano Global Presence Index

What does the Elcano Global Presence Index measure?	The Index measures global presence. By global presence we understand the effective positioning, in absolute terms, of the different countries (products sold, tourists welcomed, victories in international sports competitions...)
Does the Elcano Global Presence Index measure power?	No. A country may have strong international projection and weak regional or global influence (or vice-versa). The relationship between presence and power depends on the foreign policy of each country or on the limiting factors of the exercise of influence depending, for instance, on the presence of another regional leader.
Does it reflect the effort of countries attempting to achieve greater internationalization?	No. This Index measures the results of internationalization, not its means. For example, a country may have deployed a significant number of troops abroad with a defence expenditure that is relatively smaller than that of another country with smaller military presence.
Does it measure the openness of countries?	No. The Elcano Global Presence Index considers the external projection of the different countries more than the way in which they absorb the external action of other countries within their national territory. That is why the Index considers the exports of manufactured goods but disregards the imports. It does not measure world interdependence, though it may help to analyse such.
Is it calculated with objective or subjective data?	Objective. Its purpose is not to ascertain how a country is perceived by certain elites or by the public opinion as a whole. This Index is calculated to discover the effective external projection of the different countries, regardless of their reputation or image.
Does it measure merely the 'quantity' of a country's presence or also its nature?	Both. The Elcano Global Presence Index is composed of three dimensions (economic, military, and soft presence), which in turn are composed of variables of differing nature (ranging from energy to development cooperation, to troops deployed or to tourism). It is therefore useful in revealing not only how present countries are in the global order, but also, the nature of said presence.
How are the variables of the Elcano Global Presence Index selected?	First, presence is reflected in a single direction, what could be deemed its unidirectionality. Second, the results of presence are measured but not the means to achieve them. 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; 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 variables or indicators possible. Finally, hard data on presence are taken, and not data based on judgments or opinions.

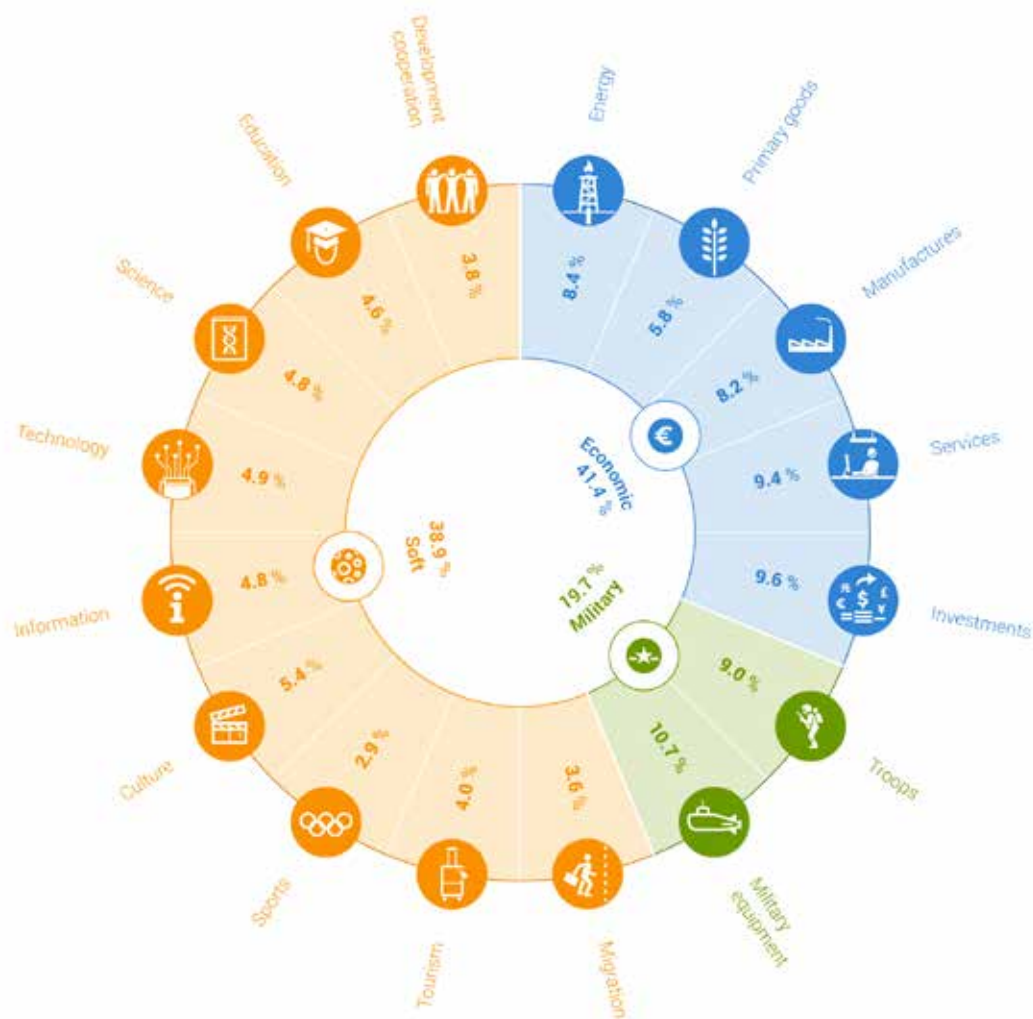
Table 0. Frequently asked questions about the Elcano Global Presence Index

How are variables combined into a synthetic index?	Weights assigned to variables and dimensions are based on experts' criteria. Two surveys were conducted in 2012 and 2015: questionnaires were sent to specialists in international relations, and answers were combined to determine the weights of variables and dimensions.
What about missing cases? How are they estimated?	These are 'hot deck' imputations. A total of 1,640 data items have been estimated from more than 31,200 observations. The number of estimations represents 5.3 % of the base.
For what years has the Index been calculated?	For 1990, 1995, 2000, 2005, and annually since 2010.
Why those years?	To reveal transformations in the world order since the Cold War ended.
For what countries?	The Elcano Global Presence Index is calculated for 90 countries: the first 85 world economies and 5 countries not listed in these positions that are nonetheless members of the OECD or the European Union.
Can the presence of different countries be combined to reveal joint presence for a chosen group or region?	Not exactly. Presence of different countries can be combined, showing regional trends of global presence. Moreover, as new editions include an increasing number of countries, for some regions (i.e. Latin America or East Asia) the number of countries selected for the Index is high enough to consider the aggregated index value as a fair reflection of the external projection of the whole region. However, it is important to note that, in these cases, the total index value is recording the relative presence of some countries within others of the same group or region (i.e. the global presence index value of Latin America includes the relative presence of Argentina in Brazil). Thus, the adding together of global presences should not be considered a metric of a given region's external projection outside its collective boundaries.
Can the presence of European countries be combined, and can it be assumed that this is the presence of the European Union?	No, for the aforementioned reason. We must bear in mind that the global presence of the member states is partially reflected in other member states of the Union. In order to apply the Index to the European Union, intra-European presence must be deducted. The intra-European presence of the member states is precisely what the Elcano European Presence Index measures.

Introduction

The Elcano Global Presence Index measures global presence. By global presence, we understand the effective positioning, in absolute terms, of the different countries. This positioning is the result of countries' records in 16 different variables. Those can be grouped in three dimensions: economic (energy, primary goods, manufactures, services, investments), military (troops, military equipment), and soft (migrations, tourism, sports, culture, information, technology, science, education, and development cooperation) (Graph 0).

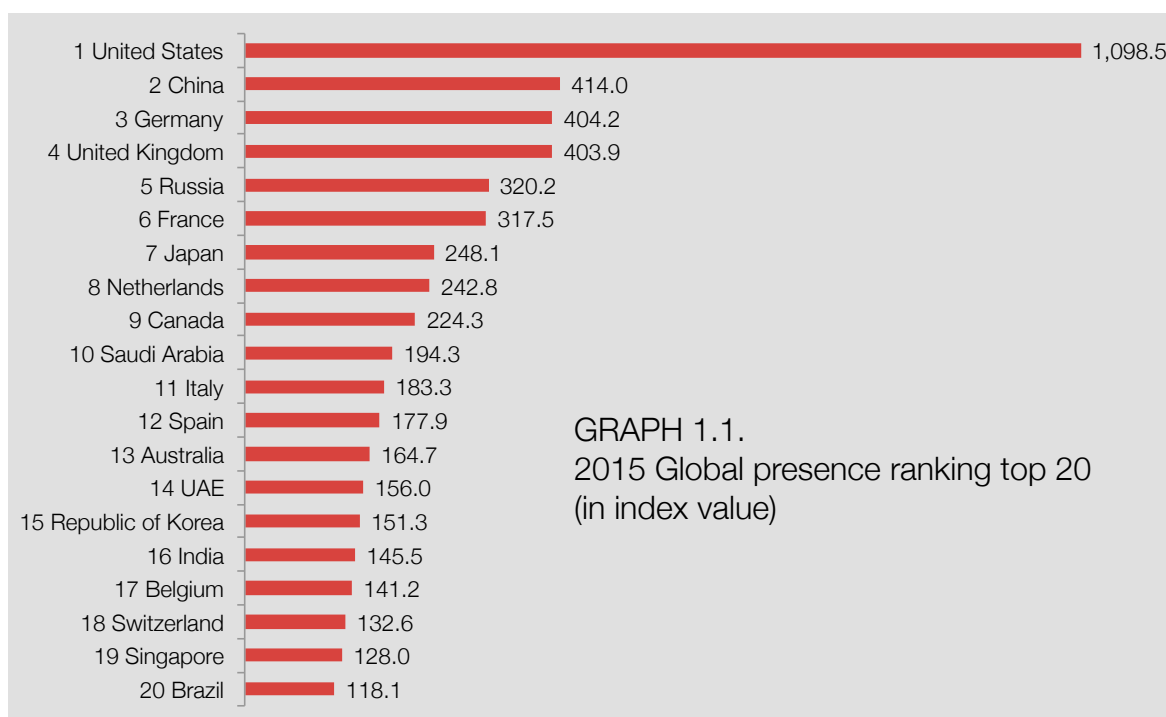
Graph 0. Structure of Elcano Global Presence Index



1. China rises, Europe stagnates

China climbs to second position

After climbing 2 positions in only one year, China is now, after the United States, the 2nd-ranked country with the highest global presence in index value terms. This is the result of the combination of an increase of almost 7% (from 387 value points in 2014 to 414 points in 2015), surpassing that of Germany (2.5%), and a 2.4% decrease of British presence. It is worth noting that Germany is one of the very few mature European economies recording, for yet another year, a sustained growth in global presence, a fact that reinforces the case for a 'Chermamy' type of external projection¹.



The United Kingdom's downscaling represents a 'back to normal' situation as last year's increase that put this country in the 2nd position (in the 2014 edition of this Index) was the result of an exceptional sale of gold to Switzerland². As a gold hub, Switzerland buys gold mainly from the United Kingdom and re-exports it to Asian markets, mostly to India and

¹ Otero-Iglesias, Miguel (2015), "Europe's Global Economic Presence vis-à-vis the Emerging Markets" in Olivé *et al.* (coords.), *Elcano Global Presence Report 2015*, Chap 3: 36-48, Elcano Royal Institute.

² See Olivé, Iliana, Manuel Gracia and Carola García-Calvo (coords.) (2015), *Elcano Global Presence Report 2015*, Elcano Royal Institute.

China (via Hong Kong)³. This is why Switzerland is up-scaling 2 positions in this year's edition (Graph 1.1).

TABLE 1.1.
Emerging countries' global presence variations (in index value)

Country	2005-2010	2010-2014	2014-2015
China	83.4	131.9	26.8
Iran	8.0	2.7	5.7
Saudi Arabia	7.2	89.7	5.7
Vietnam	3.8	13.4	4.1
Korea	23.4	47.3	3.3
Malaysia	14.8	26.3	1.2
Philippines	1.4	13.0	1.1
Singapore	21.9	49.0	1.0
Mexico	2.7	29.9	1.0
Chile	6.3	11.0	0.1
South Africa	5.4	13.5	-1.6
Algeria	1.1	10.7	-2.0
Angola	7.5	12.4	-2.3
Colombia	5.5	22.7	-2.3
Thailand	12.7	28.4	-2.4
Iraq	0.1	24.4	-2.5
Qatar	9.4	42.0	-2.7
Argentina	5.9	11.2	-2.9
Brazil	24.0	46.6	-3.1
India	29.5	61.0	-3.1
Indonesia	10.8	23.9	-3.2
Nigeria	7.2	20.2	-4.1
Kuwait	4.4	25.5	-5.0
United Arab Emirates	18.7	94.3	-6.1
Russia	21.2	129.4	-12.4

As for the United States, it still holds the 1st position of this global presence ranking in 2015, as it has in every year of the series since 1990. Despite a mild increase (6 points, in contrast with the 27 point increase of Chinese presence), it remains without question the only titan in

³ See, for instance, Bloomberg's Brief (2015), *The rise and fall of the gold*, Commodities Special Edition, May; World Gold Council Report (2014), *Understanding China's gold market*, July; Tsutsui, Hisashi (2015), "Where are All Those Imports from Switzerland Going?", *Nikkei Asian Review*, March 11; Flood, Stephen (2015), "Gold Flows East – China, India Import Massive Quantities of Gold from Switzerland", *GoldCore*, April 27.

global presence: with over 1,098 index points, its external projection almost trebles that of China.

Some mature economies continue to lose global presence, following the same trend as in previous editions⁴. This is the case of Belgium (6 points), Japan (4) and Australia (3).

The steady increase in the global presence of commodity-rich emerging countries seems to have stopped, due to a dramatic fall in primary goods prices. For instance, Brazil loses 3 points. However, more precisely, it is the energy-rich countries that are most affected, and this is due to the huge drop in oil and gas prices: Russia loses 12 points, Libya and the Netherlands 10 each, Norway and United Arab Emirates 6 each. Surprisingly, despite its heavy reliance on energy resources, Saudi Arabia manages to increase its global presence volume by 6 points, and this is due to its shift to 'beyond petroleum' forms of external action such as development cooperation, which is responsible for most of this increase (Table 1.1).

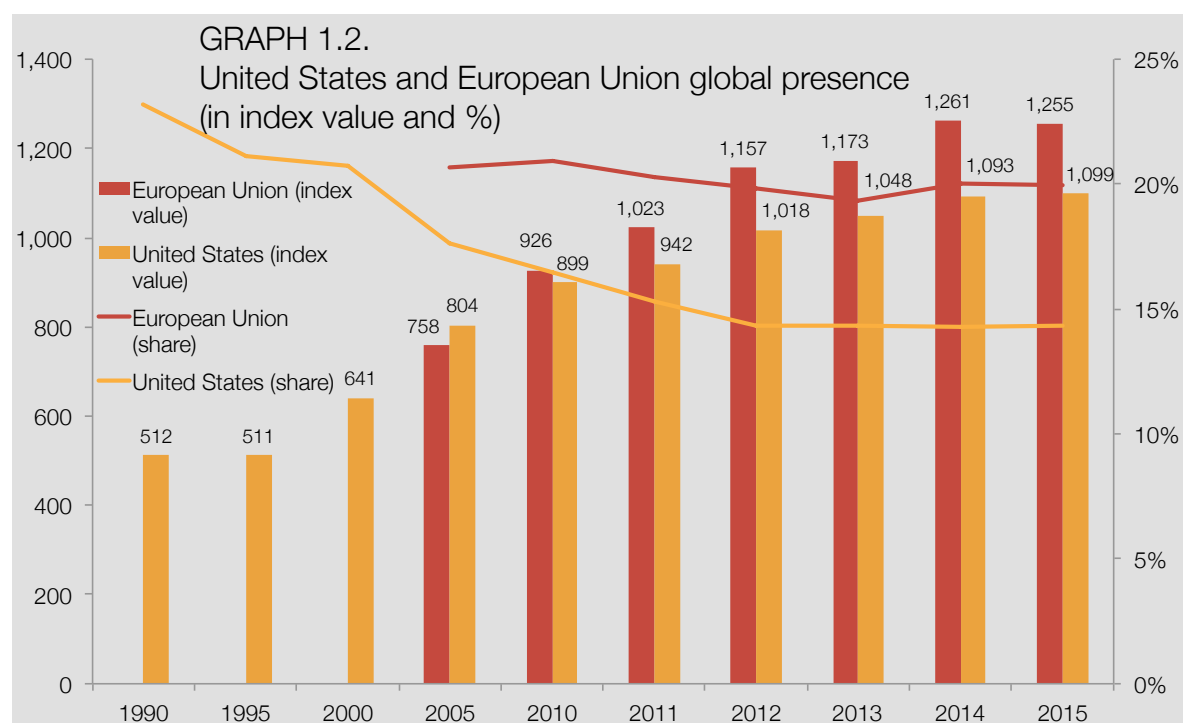
Europe's sustained decay

If the European Union acted as a single political global stakeholder, its total global presence would surpass that of the United States. Nevertheless, the European Union's global presence has decreased from almost 1,261 points in 2014 to 1,255 in 2015 (Graph 1.2). Therefore, the external projection gap between these two global actors has decreased from 169 in 2014 to 157 in 2015. Both are losing global presence quota (the share of aggregated global presence held by one single country or group of countries) as a result of the 'rise of the rest' (see section 2 of this report), although this is more pronounced in the case of the United States, which has lost half its share in the last 25 years. Note that in the case of the European Union, the small variations in global presence quotas and the increases in global presence absolute values partly reflect the expansion of the Union, through the accession of several new member states (Romania, Bulgaria and Croatia).

As was pointed out in a previous report⁵, contributions of member states to the external projection of the European Union have not varied dramatically over the last 10 years. The European Union's major economies hold about half of this projection outside the Union's borders. However, there has been some timid de-concentration, as the United Kingdom, Germany and France accounted for almost 54% of this external projection, while this figure decreased to 50% in 2015 (as a result, mainly, of lower contributions by Germany and France). For the rest of the countries, all variations in contributions to the European Union's external projection are smaller than one percentage point across an entire decade (Table 1.2).

⁴ Olivié *et al.* (coords.) (2015), *Ibid.*

⁵ Olivié *et al.* (coords.) (2015), *Ibid.*



* Index values of global presence in absolute terms plotted along the left axis; global presence quotas in percentage along the right axis.

TABLE 1.2.

European Union 2015 global presence by member state (in %)

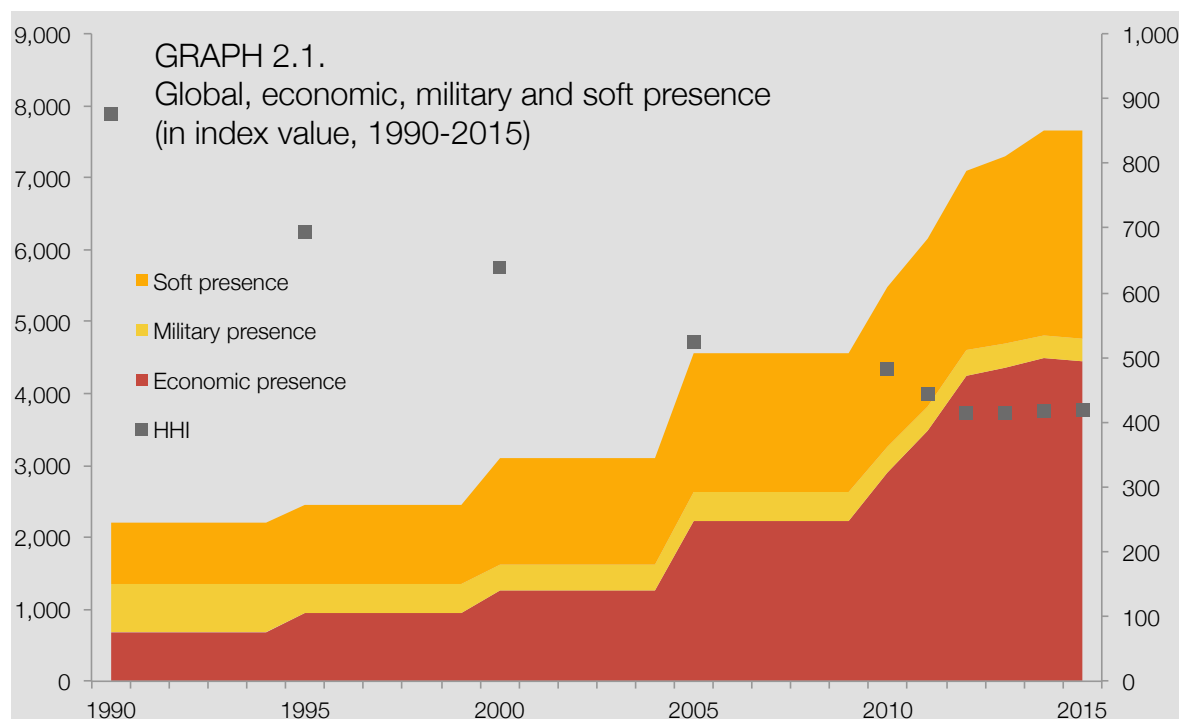
Country	2005	2015	Variation
United Kingdom	19.8	19.6	-0.2
Germany	18.5	16.5	-2.0
France	15.6	13.8	-1.8
Italy	8.2	7.8	-0.4
Netherlands	6.8	7.5	0.7
Spain	6.1	6.6	0.5
Belgium	3.7	3.8	0.1
Sweden	3.4	3.6	0.2
Denmark	2.3	2.5	0.2
Ireland	1.7	2.3	0.6
Austria	2.1	1.9	-0.2
Poland	1.5	1.8	0.4
Greece	1.9	1.7	-0.2
Finland	1.5	1.4	-0.2
Hungary	1.4	1.3	-0.2
Portugal	1.1	1.2	0.2
Luxembourg	0.5	1.1	0.6
Czech Republic	1.0	1.1	0.1
Romania	n.a.	1.0	-
Bulgaria	n.a.	0.6	-
Croatia	n.a.	0.5	-
Lithuania	0.3	0.5	0.1
Slovenia	0.4	0.4	0.0
Slovakia	0.4	0.4	-0.1
Latvia	0.7	0.4	-0.4
Malta	0.2	0.3	0.1
Cyprus	0.2	0.3	0.0
Estonia	0.3	0.2	0.0

2. Is the world de-globalizing?

The foreign policy space is stagnating

The aggregated value of global presence for all countries rated by this Index could be described as the foreign policy space. As pointed out in the two previous editions of the Elcano Global Presence Report, after a period of rapid growth starting in the mid-2000s, since 2012, the rate of growth of such space has slowed down dramatically.

Aggregate global presence has increased by 3.5 times between 1990 and 2015 (from 2,204 index value points to 7,658), though at very different speeds over that period. Between 1990 and 2012, the average rate of growth was over 10%, but this fell to less than 2.7% for the 2012-2015 period. Moreover, it could be said that this foreign policy space almost stagnated in 2014 and that it only increased by 11 points in the last year (a 0.14% increase between 2014 and 2015 (Graph 2.1)).



* Values of global presence plotted along the left axis; results of Herfindhal-Hirschman Index along the right axis.

Different dimensions have contributed to this trend to different extents. Economic presence has been the main driver of the expansion of total foreign policy space for these two and a half decades. The added value of economic presence of all countries was 6.5 times higher in 2015 compared to 1990; while in the case of soft presence it was just over 3 times higher,

military presence has been cut by half. During the 1990-2012 period of rapid global presence growth, the economic dimension increased at an annual average rate of 23.7%; much faster than soft presence (8.6%) and coinciding with a decrease of aggregate military presence (-2.7%). In short, globalisation has been mainly, but not only, an economic process.

However, this has been displaying a different pattern during the more recent period of slower growth or even stagnation. In the 2012-2015 period, soft presence was the driver of total global presence. It further increased at an average annual rate of almost 5.4%. Meanwhile, economic presence slowed down (1.5% annual increase) and military presence further decreased (-3.1%). Lastly, between 2014 and 2015, global presence growth has been due to soft presence, with an average annual rate of growth of over 2%. In parallel, both economic and military dimensions registered a fall (at annual growth rates of -0.9% and -2.1% respectively). In the case of economic presence, this was the first drop recorded in our series.

TABLE 2.1.
Variations of aggregate values of global presence, by variables
(in index value, 2012-2015)

Variable	2012-2015	2014-2015
Energy	-97.3	-232.6
Primary goods	20.1	-10.6
Manufactures	125.8	59.6
Services	249.7	97.1
Investments	165.6	-12.6
Troops	-169.2	-44.9
Military equipment	7.8	11.6
Migrations	60.1	21.5
Tourism	145.6	42.1
Sports	7.7	7.7
Culture	64	17.5
Information	550.9	-3.7
Technology	0.0	0.0
Science	128.3	41.0
Education	26.8	5.1
Development cooperation	62.7	24.1

In other words, it is mainly the military and, to a lesser extent, the economic foreign projection of countries that are having an impact on the slowing down of the aggregated foreign policy space since 2012. This can also be analysed by specific variables of global presence. Global presence decreased both through troop deployment and energy (169 and

97 global presence points, respectively) between 2012 and 2015. Major increases were meanwhile registered in information (551 points), services (250) and investments (166). Moreover, variations from the previous year include decreases in economic presence variables such as primary goods (-10.6) and investments (-12.6), as the oil crisis has deepened (Table 2.1).

This change of pattern can also be seen from a geographical point of view. Previous reports on global presence reveal a certain 'catching-up' process by emerging and developing countries with regard to traditional powers in global presence terms. A slowing down might thus lead to a repolarisation of global presence. Alternatively, stagnation of the foreign policy space could be attributed to a sudden decline in the external projection of OECD countries, while developing and emerging continue to pursue the globalization process.

Table 2.2 shows that those countries gaining weight (in absolute terms) in the foreign policy space are mostly mature economies. All of them are OECD countries (the United States and 7 European countries) with the exception of 2 huge emerging economies, China and India. This is due, on the one hand, to the fact that the initial gap in global presence between developed and developing countries is enormous. Therefore, timid rates of growth of global presence for old powers are resulting in significant increases in absolute terms. On the other hand, these results also show the strong correlation between the size of countries and the magnitude of their global presence. As noted before, China's entry into the global presence top 10 is partly due to its rapid economic growth, combined with an outward-oriented development model. However, the fact that India is recording the 7th highest increase of global presence in absolute terms (among 90 countries), based on significant growth but with an inward-looking development strategy, proves the extent to which global presence is a game for big players like the United States, China, India, Russia or even the European Union (if taken as a single stakeholder in the international arena).

In actual fact, a developed-emerging divide cannot be discerned when it comes to gains and losses of global presence during the period of slower growth in external projection. China and India are showing gains while other emerging countries such as Brazil or Nigeria lose presence in absolute terms. However, results show that among the 10 countries declining more significantly in absolute terms, several are energy-rich: Algeria, Indonesia, Kuwait, Venezuela, Norway, Nigeria, and Libya (although, in this latter case, decreases in absolute global presence are probably more closely linked with the current conflict). This coincides with a period of low prices in commodities markets and, more specifically, in the price of energy products such as oil and gas.

This trend becomes even more obvious when we observe variations in absolute terms of global presence by regions. Despite Europe's decline (underlined in previous reports on global presence⁶), it remains the region showing the greatest increase during the period of stagnation. Countries in this region manifested a cumulative increase of 272 points between 2012 and 2015 (Table 2.3). A great deal of this external presence is intra-European, although the Union managed to increase its global presence beyond its borders by almost 98 points in the period of global presence stagnation and slow economic growth. Meanwhile, the

⁶ See, for instance, Olivé, Iliana, Manuel Gracia and Carola García-Calvo (2014), *Elcano Global Presence Report 2014*, Elcano Royal Institute.

increase of North America's global presence was below that of the European Union (95.5 points), while Asia and Pacific gained global presence by over 140 points. This figure is outstanding, particularly when compared to those same figures for the Maghreb and Middle East (56 points) and for Latin America (15). Moreover, the Sub-Saharan countries for which we calculate global presence have lost external projection during this period of slower globalization (-14 points). These results reinforce previous analyses that pointed out that, when it comes to global presence, the 'rise of the rest' may well be limited to the rise of Asia⁷.

TABLE 2.2.
Main variations of aggregated values of global presence, by country
(in index value, 2012-2015)

Country	2012-2015	2010-2012	2012-2014	2014-2015
United States	50.8	118.6	74.6	6.0
China	49.0	85.1	46.8	26.8
United Kingdom	40.8	64.8	76.3	-9.8
Germany	32.5	61.5	16.0	9.7
Switzerland	28.0	18.8	7.9	23.3
France	16.4	28.9	13.2	1.5
India	15.2	42.4	18.6	-3.1
Netherlands	14.1	62.2	21.3	-9.5
Luxembourg	11.9	17.1	13.7	5.1
Spain	11.6	22.1	3.6	2.3
Brazil	-3.2	39.6	7.0	-3.1
Egypt	-3.3	2.7	-2.1	0.4
Ukraine	-3.4	5.8	16.1	-15.6
Algeria	-4.5	12.9	-2.2	-2.0
Indonesia	-5.7	30.3	-6.4	-3.2
Kuwait	-7.4	20.4	5.1	-5.0
Venezuela	-7.8	17.6	0.5	-3.7
Norway	-7.8	21.9	0.7	-6.2
Nigeria	-8.0	28.3	-8.1	-4.1
Libya	-17.6	-7.4	10.8	-9.9

⁷ Oliví, Iliana (2014), "¿El auge del resto? Apuntes sobre la presencia global de América Latina, Asia, el Magreb y Oriente Medio" *ARI* 3/2014, Elcano Royal Institute, January; Esteban, Mario (2014), "El ascenso de China y Asia: ¿qué nos dice el Índice Elcano de Presencia Global?", *ARI* 14/2014, Elcano Royal Institute, March.

TABLE 2.3.

Main variations of aggregated values of global presence, by country
(in index value, 2012-2015)

Region	2012 - 2015	2010-2012	2012-2014	2014-2015
Europe	272.1	605.4	265.1	7.0
European Union	97.8	231.6	104.3	-6.5
Asia and Pacific	140.5	409.9	116.3	24.2
North America	95.5	167.5	86.1	9.3
Maghreb and Middle East	56.1	246.0	69.0	-13.0
Latin America	14.7	136.0	26.2	-11.5
Sub-Saharan Africa	-14.3	59.3	-9.1	-5.2

Stagnation leads to re-concentration

In short, after a period of significant growth of the foreign policy space (from 1990 to 2012) came a period of slower growth (2012-2014) or near-stagnation (2014-2015). Moreover, this slower growth has been mainly driven by mature economies and East Asian and Pacific countries (particularly China and India).

Therefore, the trend towards de-concentration that accompanies booming aggregate global presence (as analysed in previous reports⁸) may reverse when that global presence tends to stagnate. And this is what different indicators of concentration show.

As regards the Herfindhal-Hirschman Index (HHI)⁹, after falling from 877 points in 1990 to a minimum of 414 in 2013 (indicating a process of de-concentration), this figure increased slightly to 417 points in 2014, and to 420 in 2015 (showing timid re-concentration of global presence in fewer countries) (Graph 2.1). The entropy index¹⁰ (which may be considered the reverse of the HHI), applied to the whole series of global presence values for all 90 countries during the 1990-2015 period, also reveals a steady increase from 1.396 points in 1990 to a peak of 1.633 in 2013, followed by a decrease in the next two years (1.629 in 2014 and 1.627 in 2015).

⁸ Olivé, Iliana, Manuel Gracia and Carola García-Calvo (2014), *Elcano Global Presence Report 2014*, Elcano Royal Institute.

⁹ The Herfindhal-Hirschman index (HHI) is a statistical measure of concentration that accounts for the relative size of all firms in a market. It is here applied by squaring and aggregating the share of global presence of all countries. It can range from 0 to 10,000. An increase shows concentration.

$$HHI = \sum_{i=1}^N S_i^2$$

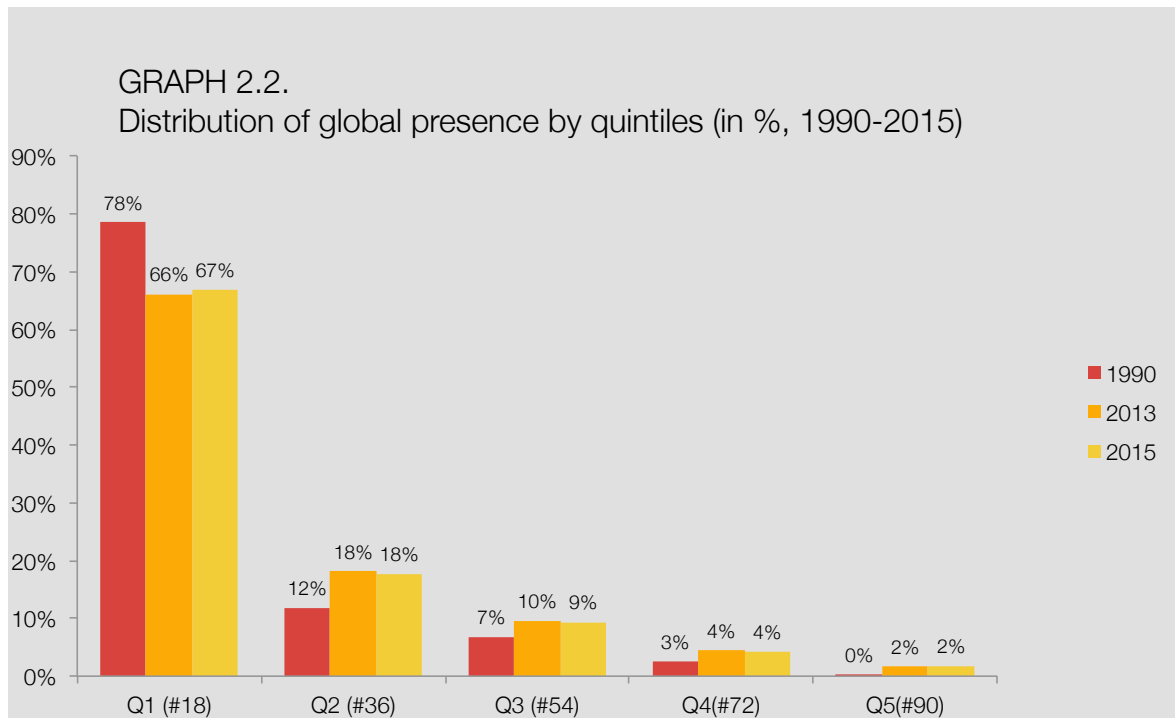
¹⁰ The entropy index is the result of adding competitors' shares of the market multiplied by their log values. It records a 0 value in the case of a perfectly monopolistic system.

$$R_e = \sum_{i=1}^N S_i \log \left(\frac{1}{S_i} \right)$$

Beyond this general pattern of de- and then re-concentration, the question that arises is how these phenomena are distributed across the whole selection of 90 countries. In other words, are the same countries losing and then winning back shares of global presence during this period? Is de-concentration affecting all countries to the same extent?

In order to answer these questions, we can observe the results of two additional equity indexes. The concentration ratio¹¹ outcomes are in line with the results of the HHI and the entropy index. Firstly, global presence shows a significant degree of concentration: in 1990, the 5 countries recording the highest value of global presence in 2015 (CR5; that is, United States, China, Germany, the United Kingdom and Russia) accounted for 49.1% of total aggregated foreign policy space. Note that these are not the same group of 5 countries recording the highest global presence in 1990 (which includes France and excludes China, while Russia is replaced by the Soviet Union). This value steadily decreased to 33.8% in 2013 and then started to increase anew, reaching its present value of 34.5% in 2015. This process of de-concentration at the top is even stronger if China is removed from the group. CR5 without China projected 47.6% of total global presence in 1990 and 28.7% in 2012 (and then 29.1% in 2015). CR10 follows a parallel trend (from 66.2% in 1990 to 49.9% in 2013, and 50.5% in 2015) as does CR15 (73.7% in 1990, 60.9% in 2013, and 61.4% in 2015) as well as CR20 (79.2%, 69.2% and 70.1%). In other words, the top 5, 10, 15 and 20 countries have been losing quotas in the foreign policy space throughout this period. Even if this trend of de-concentration has been reversed in the past 3 years, the levels of concentration are well below those recorded after the fall of the Berlin Wall.

¹¹ This concentration ratio is a measure of the total output produced in an industry (global presence) by a given number of firms (countries) in the industry. CR_n is the market share (global presence share) of the *n* largest firms (countries). Concentration ratios are generally used to show the extent of the market control of the largest firms in an industry, and to illustrate the degree to which an industry is oligopolistic.



As for the distribution of global presence by quintiles, results show that the de-concentration process between 1990 and 2013 affects the entire selection of countries: while quintile 1 (composed by the 18 countries recording the highest global presence index value each year of the series) loses share of global presence (12.3 percentage points), all other 4 quintiles gain weight. However, these increases are not evenly distributed across the selected countries. Q2 increases its presence by 6.3 percentage points, while Q3, Q4 and Q5 gain 2.8, 1.9 and 1.3 points. Conversely, during the re-concentration period (since 2013), Q1 has represented the group of countries gaining the greatest quota of aggregate global presence (0.7 percentage points), followed by Q5 (0.1), while the rest of the quintiles have lost share (-0.3 in the case of Q2 and -0.2 for both Q3 and Q4) (Graph 2.2). The net result is a significant de-concentration of global presence during the last two and half decades: the 18 countries recording more global presence (Q1) have lost almost 12 percentage points of aggregate foreign policy space. Half of this has been transferred to Q2 and the rest has been distributed among the remaining 54 countries. In general terms, although there has been a catching-up process in the foreign policy space, some countries have been catching up more than others.

Does this mean that the world is de-globalizing?

Several factors explain a downward revision of global growth expectations in a context of deflationary pressures. These factors include a slowing growth of demand in Western countries, falling oil prices, and the sudden drop in emerging countries. As we already

witnessed in the late 1920s, a debate on the possibility of a secular stagnation of the world economy is taking hold¹².

Connected to this debate in various ways is a revamping of studies on globalization: the worldwide economic slowdown is leading several analysts to wonder about an eventual reversal of the globalization process. Some of these studies deal with the potential consequences of de-globalization¹³, or else focus on the financial aspect of globalization and its relation with the international financial crisis¹⁴. Fewer studies have tried to measure globalization (and therefore de-globalization) and/or attempted to assess the magnitude of these processes. However, these authors reach similar conclusions to those following the evolution of the foreign policy space (defined by the aggregation of global presence of all 90 countries for which it is calculated). This is indeed the case when applying an entropy index to data on GDP (both global and per capita) and employment (per capita and hours worked) as a measure of globalization¹⁵; or, from a more holistic viewpoint, when aggregating the KOF index of globalization of all countries¹⁶.

Other very simple measures of the magnitude and trend of the globalization process, at least in the economic sphere, include the volume of trade or foreign investment as a proportion of world GDP. The latest available data from the World Trade Organization (WTO) show that, despite the rapid recovery following a sudden halt in 2009, the rate of trade in goods and commercial services as a proportion of GDP is currently at about 30% of world output, more than a full percentage point below its level prior to the outbreak of the crisis. Something similar occurs in terms of direct investment. According to UNCTAD, despite its resilience, particularly when compared to other international financial transactions, total flows of foreign direct investment have decreased from 3.4% of world GDP in 2007 to only 1.7% in 2014.

However, there might be other global phenomena, non-economic in nature, which may be deepening the globalization process despite the crisis. These might not be easy to capture through this type of indexes for several reasons, including their transnational nature (being non-attributable to the presence, projection, power or openness of specific countries) as well as their qualitative features. To mention just one example, this is the case with the strengthening of several multinational non-governmental organizations (NGOs) since the eruption of the world crisis.

Notwithstanding the above, economic magnitudes measured in annual variations of flows are directly affected by the slowdown of global demand, or the poor prospects of financial markets, as well as by nominal depreciations, without this necessarily implying the onset of a

¹² See for instance, Hansen, Alvin (1939) "Economic Progress and Declining Population Growth", *American Economic Review*, 29(1): 1-15; March Baldwin, Richard and Coen Teulings (eds.) (2014), *Secular Stagnation: Facts, Causes, and Cures* CEPR Press, London; Taylor, John (2014) "The Economic Hokum of Secular Stagnation", *Wall Street Journal*, January 1st; Summers, Larry (2015), "Global Economy: The Case for Expansion", *Financial Times*, October 7; Otero-Iglesias, Miguel (2016), "Radiografía (y primera resonancia) de la economía mundial: ¿estancamiento secular o shock tecnológico deflacionario?", *ARI* 11/2016, Elcano Royal Institute, January.

¹³ Bello, Walden (2004), *Deglobalization: Ideas for a New World Economy*, Zed Books; Hillebrand, Evan E. (2010), "Deglobalization Scenarios: Who Wins? Who Loses?", *Global Economy Journal* 10(2):1-21.

¹⁴ Van Rijckeghem, Caroline and Beatrice Weder di Mauro (2014), "Financial Deglobalization: Is the World Getting Smaller?", *Discussion Paper DP10139*, Centre for Economic Policy Research, September.

¹⁵ Miskiewicz, Janusz and Marcel Auloos (2010), "Has the World Economy Reached its Globalization Limit?", *Physica A: Statistical Mechanics and its Applications*, 389(4): 797-806.

¹⁶ ETH Zürich (2014), "KOF Index of Globalization 2014: Switzerland No Longer Among the Top Ten", *Press Release*, Zürich, 16 April.

path towards dis-integration. This could be the case, for example, with the deceleration in exports of manufactures, which could be compatible with a productive sphere that has become increasingly fragmented and interconnected between countries.

Whether we are witnessing a de-globalization process, a mere slowing down of international economic relations (compensated for by increasing global relations in other dimensions), or a stagnating policy space, the change of trend is consistent with processes detected in previous editions of this report.

3. Re-weighting the foreign policy space

In previous editions of the Index, global presence indicators were aggregated following experts' criteria resulting from a survey conducted in early 2012. An international panel was built on the basis of a report on think tanks prepared annually by the University of Pennsylvania, which enabled us to select 150 institutions involved in the study of international relations. This selection had the same geographical distribution as the overall universe of think tanks, according to that same source. Accordingly, 30% of the panel was based in North America (45 institutions), 27% in Europe (40), 18% in Asia (27), 11% in Latin America and the Caribbean (17), 8% in Africa (12), 5% in the Middle East and North Africa (8), and 1% in Australasia (3). For all regions, and in accordance to this distribution, top regional centres were surveyed. In addition to these centres, the members of the Scientific Council of the Elcano Royal Institute were also interviewed.

The experts consulted received a questionnaire with the object of assigning a specific weight to each indicator integrating the Elcano Global Presence Index. Questionnaires were submitted to each institution's head of research, to its highest-ranking specialist or, ultimately, to the institution itself.

In addition to changing randomly the order of appearance of the indicators (to avoid ipsative problems), two types of questionnaires were designed. In one type, interviewees were asked to assign weights both to specific dimensions (economic, military, soft) and by variable (manufactures, troops, migration, etc.). In the second questionnaire, weights were assigned only at the variable level¹⁷.

This questionnaire was also conducted internationally for the second edition of the Elcano Global Presence Index (2011 data), because the results of a strictly national panel (consulted for the first edition) produced apparently biased results. In the first edition of the Index (2010 data), variables were combined following the criteria of a Spanish group of experts formed both by members of Elcano's Scientific Council and the research staff of the Institute. The results of that preliminary survey attributed larger weights to indicators preeminent in the Spanish profile of external projection, such as, in that particular period, development cooperation. There appeared to be a geographical bias that, eventually, a larger selection of multinational experts might allow us to correct.

Results can be 'location-sensitive' and maybe therefore 'time-sensitive'. This is the reason we decided to conduct a new international survey in mid-2015. As a result of a new survey, in a different global juncture, new weights would be obtained and, when combined with previous international results, they would help to make the weighting system of the Index more robust, by removing particular time-related (e.g. commodity price booms or busts, triggering of financial crises) and geographical biases.

¹⁷ Oliu, Iliana and Ignacio Molina (2012) (eds.), "Measuring the International Presence of Countries: the Elcano Institute's IEPG Index Methodology Revisited", *Working Paper* 9/2012, Elcano Royal Institute, July.

New global challenges, new weights in international relations

A new survey was launched in June 2015. Experts were selected among think tanks assessed by the latest edition of the report published by the University of Pennsylvania¹⁸. In order to increase the absolute number of answers, the selection of centres almost doubled with respect to the 2012 selection. Also, this report offers a slightly different geographical distribution of the universe of think tanks. This was taken into account when selecting the 259 institutions consulted. The members of the Scientific Council of Elcano Royal Institute were again surveyed, adding 29 answers to the questionnaire.

The answer rate of this survey is 16.9%, distributed unevenly among regions. While a large number of think tanks from Europe and Oceania provided updated weights of different dimensions of the external projection of countries, Asian, Latin American, Sub-Saharan, Middle East and North African and, particularly, North American institutions were not that responsive; inevitably, this has had an impact on the geographical distribution of answers with regards to the selection (Table 3.1). Therefore, although the panel providing weights to the various indicators of global presence is international in essence, it should be kept in mind that the final results include an over-representation of European experts and Spanish specialists, which exerts an influence on the relative weight of different variables.

TABLE 3.1.
2015 experts' survey

Regions	Selection (%)	Answers (%)	Difference (percent. points)	Selection (#)	Answers (#)
North America	30.1	18.2	-11.9	75	8
Europe	27.5	47.7	20.2	66	21
Asia	16.7	13.6	-3.1	40	6
Latin America and the Caribbean	10.2	6.8	-3.4	25	3
Sub-Saharan Africa	7.1	6.8	-0.3	17	3
Middle East and North Africa	7.9	4.5	-3.3	18	2
Oceania	0.6	2.3	1.7	2	1
Total				243	44

In this second global survey, experts were asked to give their views on the basis of a single questionnaire that included the weighting of global presence by dimensions (economic, military and soft) and by variables within each of those dimensions.

A comparison of the 2012 and 2015 experts' criteria shows a changing perception of the relative importance of different facets of international relations. Overall, it could be said that, to experts in international relations, the world in 2015 looks 'harder' (more economic and,

¹⁸ McGann, James G. (2015), "2014 Global Go To Think Tank Index Report", TTCSP Global Go To Think Tank Index Reports, University of Pennsylvania.

particularly, more military) than it looked in 2012. Answers provided in 2015 give more weight to the economic (5.9 additional percentage points) and military (8.3 points) dimensions of global presence, while the soft dimension loses weight (-14.2 points) (Table 3.2). By individual variables, the greatest variations are those recorded by military equipment (6.3 points), energy (3.0), culture (-3.1) and information (-2.3) (Table 3.2).

TABLE 3.2.
Weights by dimension and variable – 2012 and 2015 surveys

Dimension	Variable	2012 weights (in %)		2015 weights (in %)		2012-2015 differences (in percentage points)	
Economic presence	Energy	38.50	6.95	44.4	9.9	5.9	3.0
	Primary goods		5.13		6.5		1.4
	Manufactures		7.44		8.9		1.4
	Services		8.88		10.0		1.1
	Investments		10.10		9.1		-1.0
Military presence	Troops	15.52	7.95	23.8	10.0	8.3	2.0
	Military equipment		7.57		13.8		6.3
Soft presence	Migration	45.98	4.11	31.7	3.0	-14.2	-1.1
	Tourism		4.10		3.9		-0.2
	Sports		3.42		2.4		-1.1
	Culture		6.98		3.9		-3.1
	Information		5.99		3.7		-2.3
	Technology		5.82		4.0		-1.8
	Science		5.71		3.9		-1.8
	Education		5.45		3.8		-1.7
	Development cooperation		4.40		3.2		-1.2

Moreover, we can observe that same trend towards a ‘harder’ vision of the world when comparing the different weights assigned by the few (5) individual experts that happened to participate in both editions of the survey (2012 and 2015). Economic and military presence gain weight (2.2 and 3.2 additional percentage points, respectively) while the soft dimension loses importance (-5.4 points). By individual indicators, there are major differences in the variables relating to energy (2.9 additional points) and military equipment (5.1).

The increase of the weight assigned to the energy variable might come as a surprise, given that commodity prices were considerably higher in 2012 than in 2015. Therefore, the expectation would be that experts might assign less importance to that facet in the latest survey. But the contrary proved true, and the decreasing importance assigned to the

investments variable seems more coherent with the current global juncture, given that more time has passed since the outbreak of the global financial crisis. Something similar seems to inform increases of shares given to both troops and military equipment. In this case, the recent events in Ukraine and conflicts in the Middle East and North Africa are certainly influencing respondents, where Europeans (and therefore neighbours of these conflicts) are over-represented (Table 3.4).

In order to smooth this 'time-bias', 2015 results were combined with 2012 answers (50% for each set of answers) and applied retrospectively to the whole global presence series (see Table 3.3 and the methodological annex for further details).

TABLE 3.3.
New weights by dimension and variable (in %)

Dimension	Variable	New weights	
Economic presence	Energy	41.5	8.4
	Primary goods		5.8
	Manufactures		8.2
	Services		9.5
	Investments		9.6
Military presence	Troops	19.7	9.0
	Military equipment		10.7
Soft presence	Migration	38.9	3.6
	Tourism		4.0
	Sports		2.9
	Culture		5.4
	Information		4.8
	Technology		4.9
	Science		4.8
	Education		4.6
	Development cooperation		3.8

Different regions, different views of global relations

TABLE 3.4.

Weights by dimension and variable, respondents grouped by geographical origin – 2015 survey (in %)

	North America	Europe	Asia and Oceania	Latin America and the Caribbean	Sub-Saharan Africa	Middle East and North Africa
Economic presence	40.0	45.4	38.6	40.8	50.0*	40.0
Energy	7.6	10.4	9.7	8.6	5.8	12.0
Primary goods	8.0	7.0	6.9	5.1	15.0	6.0
Manufactures	7.6	8.7	8.3	8.2	10.0	5.0
Services	8.4	9.9	8.2	9.2	10.8	7.0
Investments	8.4	9.6	5.5	9.7	8.3	10.0
Military presence	30.0	26.5	27.1	15.8	5.0	35.0
Troops	15.0	11.5	12.8	6.9	3.0	14.0
Military equipment	15.0	15.0	14.3	8.9	2.0	21.0
Soft presence	30.0	28.1	34.3	43.3	45.0	25.0
Migration	2.3	3.0	4.6	4.7	3.8	4.2
Tourism	3.1	2.9	4.0	7.3	11.4	5.4
Sports	2.5	2.1	2.4	3.3	3.1	1.8
Culture	4.2	2.7	4.1	4.7	7.6	3.6
Information	4.3	3.5	4.0	4.0	4.6	2.4
Technology	4.4	3.5	3.5	3.3	3.8	1.2
Science	4.0	3.7	3.9	4.7	3.1	1.2
Education	3.0	3.3	5.0	6.2	5.3	3.0
Development cooperation	2.2	3.3	2.9	5.1	2.3	2.4

* Figures in red refer to the maximum value attributed to the variable by a regional group of experts.

Answers provided by respondents can be grouped according to the geographical origin of the think tanks consulted (Table 3.4). This breakdown shows interesting results, which suggest that answers are not only ‘time-sensitive’ but also ‘location-sensitive’. For instance, from the point of view of Sub-Saharan centres, military presence is not a key dimension of international relations. The average weight assigned is 5%, which is very low when compared to the 35% attributed by centres from the Middle East and North Africa. On the other hand, Sub-Saharans give great importance to the economic dimension (50%) while,

surprisingly (given the economic emergence of the region), this is not such an important facet of international relations for Asian and Oceanic respondents (38.6%). For Sub-Saharan, too, soft relations are of great importance (45%), a view that they share with Latin Americans (43.3%). For their part, respondents from the Middle East and North Africa do not consider that soft presence shapes the global presence of countries significantly (25%) (Table 3.4).

Quite coherently, centres in the Middle East and North Africa are those assigning more weight than other centres to the energy (12%) and military equipment (21%) variables. Something similar can be said of Sub-Saharan think tanks with regard to primary goods (15%), tourism (11.4%), and culture (7.6%). Respondents from North America were those assigning the greatest weight to troops (15%) and technology (4.4%). As for Latin American and Caribbean experts, they assigned more importance to education (6.2%), science (4.7%) and development cooperation (5.1%) (Table 3.4). It may be that the importance attributed to development cooperation is related to the fact that several traditional donors have been scaling down their presence in Latin America in the last few years, perhaps keeping this facet of international relations at the core of the debate (and in the minds of the respondents). Something similar seems to have occurred regarding the military dimension for Asian interviewees, and with the energy variable for Europeans (given the significant energy dependence of most European countries).

TABLE 3.5.

Global presence top 10 according to different weighting distributions by geographical origin of respondents

#	North America	Europe	Asia and Oceania	Latin America and the Caribbean	Sub-Saharan Africa	Middle East and North Africa
1	United States	United States	United States	United States	United States	United States
2	China	China	China	China	China	Russia
3	Germany	Germany	Germany	United Kingdom	Germany	United Kingdom
4	United Kingdom	United Kingdom	United Kingdom	Germany	United Kingdom	China
5	Russia	Russia	Russia	France	France	Germany
6	France	France	France	Russia	Netherlands	France
7	Netherlands	Netherlands	Netherlands	Japan	Russia	Saudi Arabia
8	Japan	Japan	Japan	Netherlands	Canada	Netherlands
9	Canada	Canada	Canada	Canada	Spain	Canada
10	Italy	Saudi Arabia	Italy	Saudi Arabia	Japan	United Arab Emirates

Obviously, different weights assigned to different dimensions and variables result in different country rankings according to their final global presence value. For instance, Spain would be 9th if global presence indicators were aggregated according to Sub-Saharan experts, but it would not appear among the top 10 countries according to the rest of respondents. Similarly, Russia would be 2nd and United Arab Emirates 10th if sector priorities were ranked by think tanks from the Middle East and North Africa (Table 3.5).

However, in general terms, and despite the differences in the weights assigned by interviewees with different cultural, economic and political backgrounds, there are no major differences among these 6 versions of the top 10 countries according to their global presence index value. The United States always ranks 1st, and China 2nd (except according to Middle East and North African experts), while Germany and the United Kingdom occupy the 3rd or 4th places (again, for all respondents except those from MENA). In other words, there are no major differences among respondents as to what dimensions of global relations are the most important; hence, the values recorded by countries in the components (e.g. huge manufacture exports from China) determines the different positions of countries far more decisively than the weight given to those indicators.

Methodological annex

The methodology of this 2015 edition of the Elcano Global Presence Index mainly replicates that of the previous edition¹⁹, which was itself the result of a process of methodological discussions initiated in 2008.

However, in this edition two main methodological changes have been incorporated. The first is the revision of the weight attributed to variables and dimensions in the Index's formula. The second is a new indicator on information.

New survey for weighting criteria

As explained in section 3 of this report, in previous editions, global presence indicators were aggregated following experts' criteria resulting from a survey conducted in early 2012. An international panel was built on the basis of a report on think tanks prepared annually by the University of Pennsylvania, which enabled us to select 150 institutions involved in the study of international relations. Because the results of that survey appeared to be both 'location-sensitive' and 'time-sensitive', a new international survey was conducted in mid-2015. Through this new survey, conducted in a different global context, new weights would be obtained. When combined with previous international results, these would help to increase the robustness of the weighting system of the Index, removing particular time and geographical biases. The new weights are the result of the combination of the 2012 and 2015 surveys. These have been applied retroactively, affecting the whole 1990-2015 time series.

New indicator on presence through information

The second main methodological change in this edition concerns the information indicator. The rationale for this new methodology is further developed in the 2015 report. When the Index was first designed, we 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, and even its citizens within an 'Internet 2.0' environment. Since then, we have revisited the information dimension to reconsider the best way to reflect the global presence of every country as studied from a 'soft' (content-oriented) point of view. We found the possibility of measuring the explicit references to a given country and its citizens in news disseminated by media around the world, particularly global news agencies. 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' agencies (AP, AFP, Reuters), we decided to include the Chinese (Xinhua) and Russian (ITAR-TASS) national agencies, and to complete the survey with EFE, ANSA, and

¹⁹ Olivié, Iliana, Manuel Gracia and Carola García-Calvo (coords.) (2015), *Elcano Global Presence Report 2015*, Elcano Royal Institute.

DPA to guarantee a diversity of sources and to reduce the influence of Reuters/AFP in the sample generated by the volume of items published.

We 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.
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 abovementioned agencies, with the exception of the agency's country of origin (thus, Spain was excluded from the EFE search, the United Kingdom from the Reuters search, the United States from the AP search, etc.).

This fifth criterion was relevant in order to avoid the overrepresentation of each country in its own agency, due to the historical origin and function of the news agencies²⁰. This also applies to the European Union's presence in information: since our objective is to obtain the European Union's presence outside the European Union's borders, European agencies are excluded when measuring this variable. In this particular case, wires are limited to those generated by AP, Xinhua and ITAR-TASS.

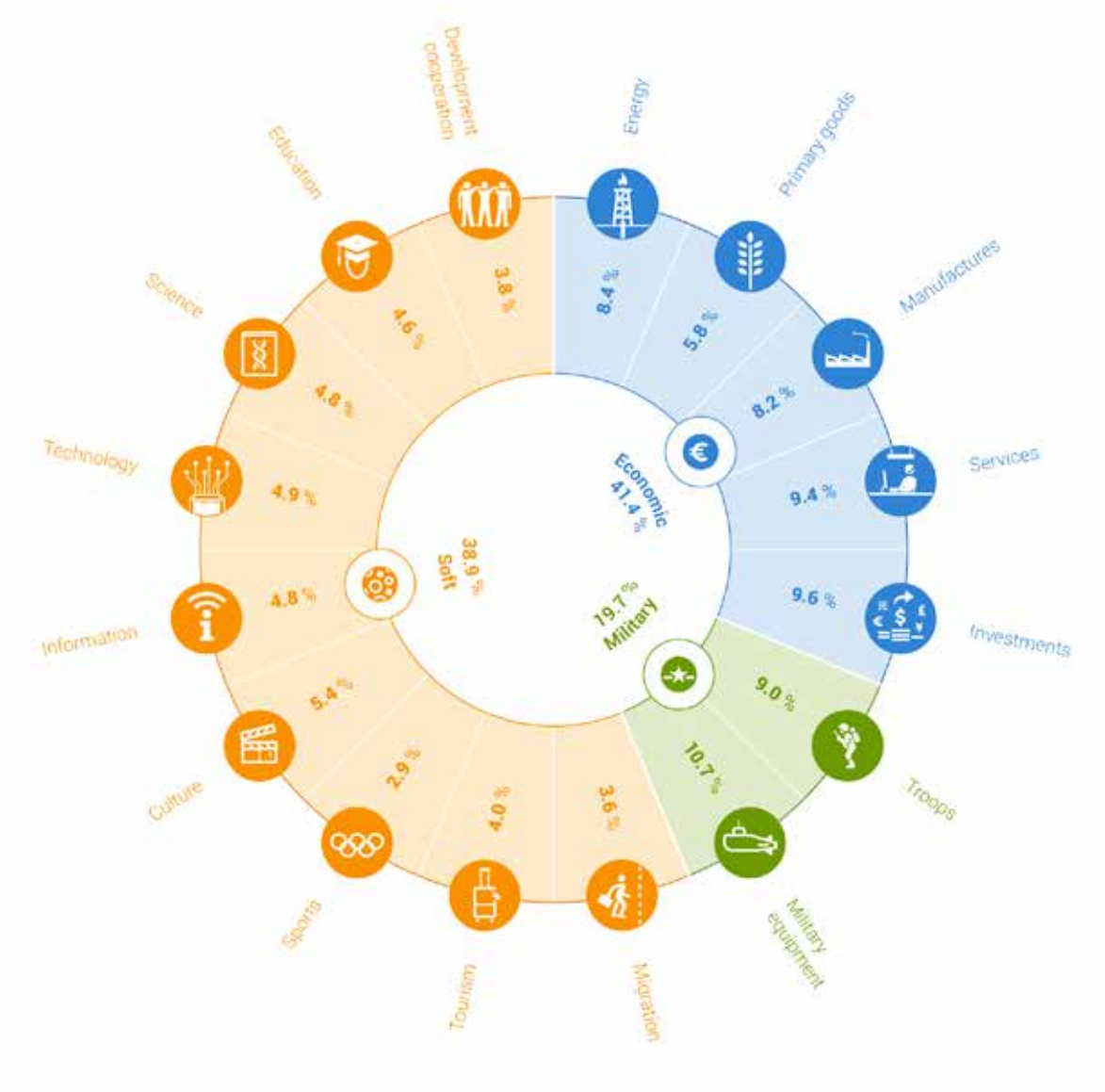
Conversely, when calculating the European Presence Index, the objective is to measure the presence of member states inside the European Union's borders. Therefore, it includes the number of news items on each member state generated by European news agencies (Reuters, AFP, EFE, DPA, ANSA), though excluding the country's own agency in order to avoid overrepresentation.

It could be argued that the inclusion of this new variable gives a more robust measurement of information's role in the external presence of a country, as the infrastructure approach used in previous editions might merely reflect a potential that may or may not be effectively transformed into presence. Yet, at the same time, the complete substitution of one variable by the other would imply the exclusion of the Internet, a crucial dimension of contemporary presence. To keep both dimensions, Internet and news agencies, on the same basis for defining actual presence in the information domain, was our main methodological goal. A workshop with experts (including academics and business people) was held to discuss the technical possibilities of obtaining a measurement of the real presence of countries on the Internet. The workshop was attended by Natalia Basterrechea (Facebook Spain), Dr. Trinidad García Leyva (Carlos III University of Madrid), Francisco Ruiz Antón (Google Spain) and Ángel Badillo (Senior Analyst at Elcano Royal Institute). The ensuing debate revealed the difficulty of obtaining such a measurement (e.g. countries' presence via Facebook, Twitter or Google), mainly due to the unavailability of key data.

²⁰ For more information see Badillo, Ángel and Manuel Gracia (2015), "Measuring soft presence through news wire services" in Olivé, Iliana *et al.* (coords.), *Elcano Global Presence Report 2015*, Chap 6: 66-75, Elcano Royal Institute, Madrid.

At the same time, however, we considered it to be of the utmost importance that the Internet dimension be maintained as a measurement of global presence. Consequently, the new information indicator is the sum of countries' presence in two dimensions: news agencies' wires and Internet, assessed with our pre-existing variable of band-width. Each dimension weighs 50% within the information's variable.

Graph A.1. Structure of Elcano Global Presence Index



Brief history of the project

The first version of the Index, published in 2011, ranked 54 countries according to their 2010 global presence²¹. That edition and, therefore, the design of the Index itself, was coordinated by Ignacio Molina and Iliana Olivé (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), Émerson 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 Arahetes (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 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 Arahetes, 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 (including its 2015 meeting and the 2015 experts' survey). We have also received useful comments and suggestions over the years, as a result of numerous meetings convened 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), members of the Central Bank of Spain (2014), and both professors and students at different universities (Saint-Louis University of Madrid in 2015, Rey Juan Carlos University in 2014 and 2015, Deusto University in 2016). The Index has also been presented to the general public (once a year) and 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).

²¹ Olivé, Iliana and Ignacio Molina (2011), "Elcano Global Presence Index", *Estudio Elcano 2*, Elcano Royal Institute.

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, as well as to those who have participated in the weighting survey: Ángel Aguado (EFE, Spain), Hayden Allen (Accord, South Africa), Alejandro Anaya (Center for Research and Teaching in Economics, Mexico), Barbara d'Ándrea (World Trade Organization), Nisha Arunatilake (Institute of Policy Studies of Sri Lanka), Bruno Ayllón (Complutense University of Madrid, Spain), D Shyam Babu (Centre for Policy Research, India), John Blaxland (ANU Strategic & Defence Studies Centre, Australia), Amelia Branczik (Crisis Group, Belgium), Gordan Bosanac (Centar za mirovne studije, Croatia), Chiao-Ling Chien (UNESCO), Alba Çela (Albanian Institute for International Studies), Alistair D. B. Cook (Institute of Defence and Strategic Studies, Singapore), José Miguel Cortés (Spanish Ministry of Economy), Marie Cross (Institute of International and European Affairs, Ireland), Jean-François Daguzan (Foundation for Strategic Research, France), Rafael Domínguez (University of Cantabria, Spain), Jorge Gómez Arismendi (Fundación para el Progreso, Chile), Christine Ma. Grace R. Salinas (Philippine Institute for Development Studies), Charles Jebuni (Institute of Economic Affairs, Ghana), Katie Jost (GAD), Gape Kaboyakgosi (Botswana Institute for Development Policy Analysis), Guillermo Kessler (Spanish Ministry of Economy), Changsu Kim (Korea Institute for Defense Analyses, Republic of Korea), Anna Koós (Centre for Strategic and Defence Studies, Hungary), Carlos Latorre (Spanish Agency for International Development Cooperation), José María Lladós (Argentine Council for International Relations), Luis Martí (Spanish Ministry of Economy), Pauline Massart (Security & Global Europe, Belgium), 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), Said Moufti (Royal Institute for Strategic Studies, Morocco), Franklin Oduro (Ghana Center for Democratic Development), Anna Orlonek (demosEUROPA, Poland), Eleni Panagiotarea (Hellenic Foundation for European & Foreign Policy, Greece), Roderick Parkes (Swedish Institute of International Affairs, Sweden), Rodrigo Perera (Borde Político, Mexico), Moisés Pérez (Spanish Ministry of Economy), Juan Pita (Spanish Agency for International Development Cooperation), Henry Plater-Zyberk (Prague Security Studies Institute, Czech Republic), Anton du Plessis (Institute for Security Studies, South Africa), Rosario Pons (EFE), Arantxa Prieto (World Trade Organization), Philip Purnell and Sébastien Velley (Thomson Reuters), Charles P. Ries (Rand, United States), Robert Robinson (Universidad Pontificia de Comillas, Spain), Ventura Rodríguez (Spanish Agency for International Development Cooperation), Pep Ruiz (BBVA Research, Spain), Verónica Samper (Spanish Ministry of Economy), Manuel Sánchez (Spanish Ministry of Economy), Patrick Sandoval (Spanish Ministry of Foreign Affairs and Cooperation), Paul Saunders (Center For the National Interest, United States), Katarzyna Sidlo (Center for Social and Economic Research, Poland), Pedro Sosa (Spanish Ministry of Foreign Affairs and Cooperation), Gabriele Schwarz (Spanish Ministry of Economy), David J. Theroux, (The Independent Institute, United States), José Tregón (Spanish Ministry of Economy), Yan Vaslavsky (MGIMO-Moscow State Institute of International Relations, Russia), Antonio Villafranca (Italian Institute for International Political Studies), Marija Vuksanovic (Centre for Democracy and Human Rights, Montenegro), Bibian Zamora (Spanish Ministry of Foreign Affairs and Cooperation), María Pilar Zaragüeta (EFE, Spain), Mario Abou Zeid (Carnegie Institute, Lebanon) and Ann Zimmerman (OECD).

Main elements of the Elcano Global Presence Index

This year's edition covers the global presence of a selection of 90 countries. The selection includes the first 85 world economies according to World Bank data (nations with the highest GDP in current US dollars in 2014) 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 2015 edition, 10 new countries have been added to the selection. These are Costa Rica, Dominican Republic, Ethiopia, Guatemala, Kenya, Myanmar, Tanzania, Turkmenistan, Uruguay and Uzbekistan.

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

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

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, Turkmenistan, Ukraine and Uzbekistan as part of the Soviet Union, Slovakia as part of Czechoslovakia, and Croatia and Slovenia as part of Yugoslavia.

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

Variable	Indicator	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	Number of mentions in news of main international press agencies (Associated Press, Reuters, AFP, DPA, ITAR-TASS, EFE, ANSA, Xinhua) Internet bandwidth (Mbps)	Factiva database 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 and official national sources

The variables, indicators, and sources for this 2015 Elcano Global Presence Index are the same as for the previous edition, with mentioned changes made in the measurement of information presence (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 opinions²².

In this 2015 edition, 1,640 cases have been estimated. Thus the proportion of missing and estimated cases represents only 5.3% of a database of more than 31,200 observations. Again, the 'hot deck' method has been used for these estimations. These observations allowed us to obtain over 47,600 results, which are all available for download in the data section of our website (www.globalpresence.realinstitutoelcano.org).

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 2015 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 the past few years (including 2010) have changed, thus modifying the maximum value that is referenced in the 0-1000 scaling. Moreover, the inclusion of new countries systematically affects 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 90 countries. Changes caused by updates in original sources or by the enlargement of our selection of countries are added to changes resulting from the methodological improvement applied in this 2015 edition which, as previously noted, affects the weights of all indicators, especially in the way we calculate presence through information. Therefore, new results may not match those of previous editions of the Index.

The inclusion of the European Union in Elcano Global Presence Index

One of the features of the 2012 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. 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 since 2013.

To measure the European Union's presence in the world, we draw upon the components of the Elcano Global Presence Index. For each of these components and for every member, the

²² For more details on the debates and criteria that guided this selection, see Olivié, Iliana and Ignacio Molina (2011), "Elcano Global Presence Index", *Estudio Elcano 2*, Elcano Royal Institute.

intra-European and extra-European flows must be differentiated, since a mere totalling of their results would be recording their projection in other member states (e.g. consider the intra- and extra-European trade in German goods). This distinction between flows has been made feasible by the use of additional sources of data, and especially Eurostat (Table A.4).

As for the 2014 edition, we have again calculated 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 explained above, information is now composed of two elements, Internet bandwidth and mentions by press agencies. The distinction between European and extra-European is not complicated in terms of the press agencies, as we can differentiate between European and non-European agencies. On the Internet bandwidth side, given the indivisibility of the variable, we have assigned the highest value recorded by a European country for the calculation of the Union's global presence. 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, allowing it to be easily transformed into a share (Table A.3). This is the case for troops, military equipment, science, and development cooperation.

Since the 2012 edition, we calculate 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, 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. This 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 by comparing the position of the member states in global and European 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 has been respected as far as possible, although some slight modifications have occasionally proved essential (Table A.4). 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). For that reason three variables compute a 0 value, as they are not part of European countries' projection inside the European Union: troops, military equipment and development cooperation. Moreover, given the indivisibility of some variables, there was no possibility of distinguishing the extra- from the intra-European component, so we adhere to the values of global presence and re-scale them considering only the European countries. This is the case with sports, science and information (in terms of its Internet component).

Eurostat makes up most of the source data, just as in the calculation of the global presence of the European Union. Obviously, the change in scale also reduces the scaling: the value of 1000 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 taken to be the Union as composed in different moments of time, variations being the result of the enlargement process.

Table A.3. Variables, indicators, and sources of the Elcano Global Presence Index calculated for the European Union

Variable	Indicator	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		
Troops	Number of military personnel deployed in international missions and bases outside the EU	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 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	Number of mentions in news of main international press agencies (Associated Press, ITAR-TASS, Xinhua) Internet bandwidth (Mbps)	Factiva database 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

Table A.4. Variables, indicators, and sources of the Elcano European Presence Index

Variable	Indicator	Source
Economic presence		
Energy	Intra-EU flows of exports of energy products (oil, refined products and gas) (SITC 333, 334, 343)	Eurostat
Primary goods	Intra-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	Intra-EU flows of manufactured goods (chemical products, machinery, transport equipment, other manufactured products) (SITC 5 to 8 minus 667 and 68).	
Services	Intra-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 in the EU	
Military presence		
Troops	Value 0 for all countries and years	
Military equipment	Value 0 for all countries and years	
Soft presence		
Migration	Estimated number of immigrants from within the EU	Eurostat
Tourism	Thousands of arrivals of tourists from within the EU	Eurostat
Sport	Weighted sum of points in the FIFA world ranking and medals won at the summer Olympic Games	FIFA and IOC
Culture	Intra-EU exports of audiovisual services (cinematographic productions, radio and television programmes, and musical recordings)	Eurostat and national sources
Information	Number of mentions in news of main European press agencies (AFP, ANSA, DPA, and EFE) Internet bandwidth (Mbps)	Factiva database International Telecommunication Union
Technology	Number of patents registered at the European Patent Office (EPO)	Eurostat
Science	Number of articles published in the fields of the arts and humanities, social sciences and sciences	Thomson Reuters – Web of Knowledge
Education	Number of EU foreign students in tertiary education	Eurostat
Development cooperation	Value 0 for all countries and years	

Statistical annex

TABLE B.1.
Elcano Global Presence Index 2015

Country	Index value	Position	Position by dimension		
			Economic	Military	Soft
Algeria	34.5	51	39	35	71
Angola	29.7	54	40	64	89
Argentina	42.7	43	47	26	32
Australia	164.7	13	15	16	11
Austria	68.3	28	33	53	23
Azerbaijan	19.2	60	57	78	67
Bangladesh	8.8	77	78	18	82
Belarus	18.8	62	62	79	58
Belgium	141.2	17	12	49	21
Brazil	118.1	20	20	11	16
Bulgaria	17.2	64	65	47	55
Canada	224.3	9	8	22	10
Chile	40.2	45	41	29	48
China	414.0	2	2	3	5
Colombia	40.0	46	46	43	40
Costa Rica	7.2	81	84	88	73
Croatia	17.2	65	70	76	49
Cuba	14.3	68	77	81	50
Cyprus	7.0	84	79	85	77
Czech Republic	43.5	42	45	71	34
Denmark	59.6	32	34	34	30
Dominican Republic	9.3	76	80	86	66
Ecuador	15.9	66	63	58	70
Egypt	27.6	56	61	27	42
Estonia	8.1	80	72	83	75
Ethiopia	9.5	75	89	13	74

TABLE B.1.
Elcano Global Presence Index 2015 (cont.)

Country	Index value	Position	Position by dimension		
			Economic	Military	Soft
Finland	35.1	50	49	68	43
France	317.5	6	7	4	4
Germany	404.2	3	3	12	3
Greece	49.2	37	51	25	26
Guatemala	6.1	86	82	72	83
Hungary	37.5	47	52	62	36
Iceland	5.2	87	85	89	85
India	145.5	16	13	7	18
Indonesia	64.8	30	26	10	51
Iran	51.7	34	37	45	35
Iraq	44.6	41	32	59	64
Ireland	69.0	27	25	67	41
Israel	35.3	49	50	42	44
Italy	183.3	11	16	8	9
Japan	248.1	7	11	6	6
Kazakhstan	42.2	44	36	80	53
Kenya	11.5	71	86	31	61
Kuwait	51.1	35	30	60	57
Latvia	7.0	83	76	82	80
Libya	13.3	69	64	66	79
Lithuania	12.5	70	66	74	72
Luxembourg	56.1	33	44	84	22
Malaysia	84.1	24	23	30	29
Malta	6.8	85	75	87	81
Mexico	98.4	21	22	41	20
Morocco	18.5	63	68	28	52
Myanmar	7.1	82	74	52	84
Netherlands	242.8	8	5	23	12
New Zealand	29.3	55	54	56	45
Nigeria	51.0	36	29	33	62
Norway	84.4	23	21	36	33
Oman	23.9	58	48	54	78

TABLE B.1.
Elcano Global Presence Index 2015 (cont.)

Country	Index value	Position	Position by dimension		
			Economic	Military	Soft
Pakistan	15.3	67	71	15	63
Peru	20.9	59	58	24	65
Philippines	26.2	57	55	57	47
Poland	68.0	29	31	48	27
Portugal	36.0	48	53	44	37
Qatar	62.9	31	24	73	59
Republic of Korea	151.3	15	18	9	13
Romania	31.0	53	59	37	39
Russia	320.2	5	4	2	7
Saudi Arabia	194.3	10	9	21	14
Singapore	128.0	19	14	17	28
Slovakia	19.2	61	60	65	60
Slovenia	11.2	72	69	69	69
South Africa	46.4	39	42	32	38
Spain	177.9	12	19	14	8
Sri Lanka	5.2	88	83	50	87
Sudan	4.2	90	88	70	86
Sweden	87.2	22	27	61	17
Switzerland	132.6	18	17	75	19
Syria	10.5	73	90	77	54
Tanzania	4.4	89	87	40	88
Thailand	71.8	26	28	20	31
Turkey	83.9	25	38	19	15
Turkmenistan	8.2	79	67	90	90
Ukraine	45.2	40	56	46	24
UAE	156.0	14	10	55	25
United Kingdom	403.9	4	6	5	2
United States	1,098.5	1	1	1	1
Uruguay	9.6	74	81	39	68
Uzbekistan	8.2	78	73	51	76
Venezuela	47.2	38	35	38	46
Vietnam	34.4	52	43	63	56

TABLE B.2.
Global presence share (selected years, in %)

Country	1990	2000	2010	2015
Algeria	0.3	0.4	0.5	0.5
Angola	0.1	0.2	0.4	0.4
Argentina	0.6	0.6	0.6	0.6
Australia	1.4	2.0	2.3	2.2
Austria	1.1	1.0	1.0	0.9
Azerbaijan	-	0.1	0.2	0.3
Bangladesh	0.1	0.1	0.1	0.1
Belarus	-	0.2	0.3	0.2
Belgium	1.7	1.8	2.1	1.8
Brazil	0.8	1.0	1.4	1.5
Bulgaria	0.5	0.2	0.2	0.2
Canada	2.8	3.4	2.9	2.9
Chile	0.3	0.4	0.5	0.5
China	1.5	2.7	4.7	5.4
Colombia	0.2	0.3	0.4	0.5
Costa Rica	0.1	0.1	0.1	0.1
Croatia	-	0.2	0.3	0.2
Cuba	0.1	0.3	0.3	0.2
Cyprus	0.1	0.1	0.1	0.1
Czech Republic	0.4	0.4	0.6	0.6
Denmark	0.7	0.8	0.9	0.8
Dominican Republic	0.1	0.1	0.1	0.1
Ecuador	0.1	0.1	0.2	0.2
Egypt	0.3	0.4	0.5	0.4
Estonia	-	0.1	0.1	0.1
Ethiopia	0.1	0.1	0.1	0.1
Finland	0.4	0.6	0.5	0.5
France	6.2	5.6	5.0	4.1
Germany	6.5	5.8	5.8	5.3
Greece	0.6	0.8	0.7	0.6
Guatemala	0.0	0.1	0.1	0.1
Hungary	0.8	0.4	0.5	0.5
Iceland	0.1	0.1	0.1	0.1

TABLE B.2.

Global presence share (selected years, in %) (cont.)

Country	1990	2000	2010	2015
India	0.9	1.1	1.6	1.9
Indonesia	0.5	0.8	0.8	0.8
Iran	0.7	0.7	0.8	0.7
Iraq	0.4	0.5	0.4	0.6
Ireland	0.4	0.7	0.9	0.9
Israel	0.4	0.7	0.5	0.5
Italy	3.0	3.1	2.7	2.4
Japan	4.3	4.9	3.7	3.2
Kazakhstan	-	0.3	0.5	0.6
Kenya	0.1	0.1	0.2	0.1
Kuwait	0.4	0.4	0.6	0.7
Latvia	-	0.1	0.1	0.1
Libya	0.3	0.3	0.4	0.2
Lithuania	-	0.1	0.2	0.2
Luxembourg	0.4	0.2	0.4	0.7
Malaysia	0.6	0.9	1.0	1.1
Malta	0.0	0.1	0.1	0.1
Mexico	0.9	1.6	1.2	1.3
Morocco	0.3	0.2	0.2	0.2
Myanmar	0.0	0.1	0.1	0.1
Netherlands	2.2	2.6	3.0	3.2
New Zealand	0.4	0.4	0.4	0.4
Nigeria	0.4	0.5	0.6	0.7
Norway	0.9	1.2	1.2	1.1
Oman	0.1	0.2	0.2	0.3
Pakistan	0.4	0.3	0.3	0.2
Peru	0.3	0.2	0.3	0.3
Philippines	0.2	0.3	0.2	0.3
Poland	0.5	0.8	0.8	0.9
Portugal	0.5	0.5	0.5	0.5
Qatar	0.3	0.2	0.4	0.8
Republic of Korea	0.9	1.5	1.8	2.0

TABLE B.2.
Global presence share (selected years, in %) (cont.)

Country	1990	2000	2010	2015
Romania	0.4	0.4	0.4	0.4
Russia	12.6	3.7	3.7	4.2
Saudi Arabia	1.5	1.5	1.8	2.5
Singapore	0.7	1.1	1.4	1.7
Slovakia	-	0.2	0.3	0.3
Slovenia	-	0.1	0.2	0.1
South Africa	0.5	0.7	0.6	0.6
Spain	2.0	2.5	2.7	2.3
Sri Lanka	0.1	0.1	0.1	0.1
Sudan	0.1	0.1	0.1	0.1
Sweden	0.9	1.2	1.1	1.1
Switzerland	1.3	1.3	1.5	1.7
Syria	0.7	0.4	0.2	0.1
Thailand	0.4	0.8	0.8	0.9
Turkey	0.5	0.8	1.0	1.1
Turkmenistan	-	0.1	0.0	0.1
Ukraine	-	0.6	0.7	0.6
UAE	0.3	0.8	1.2	2.0
United Kingdom	5.3	5.5	5.0	5.3
Tanzania	0.1	0.1	0.1	0.1
United States	23.2	20.7	16.5	14.3
Uruguay	0.1	0.1	0.1	0.1
Uzbekistan	-	0.1	0.2	0.1
Venezuela	0.5	0.6	0.6	0.6
Vietnam	0.3	0.2	0.3	0.4

TABLE B.3.

Global presence contribution by dimension (2015, in %)

Country	Economic	Military	Soft
Algeria	81.9	2.5	15.6
Angola	94.9	0.4	4.6
Argentina	46.9	3.6	49.5
Australia	58.4	1.9	39.7
Austria	52.9	0.5	46.6
Azerbaijan	68.2	0.2	31.6
Bangladesh	37.6	28.9	33.5
Belarus	53.7	0.1	46.1
Belgium	76.5	0.3	23.2
Brazil	59.1	3.2	37.7
Bulgaria	45.1	2.6	52.3
Canada	63.6	0.9	35.5
Chile	66.1	3.6	30.3
China	65.1	3.1	31.8
Colombia	55.0	1.5	43.5
Costa Rica	38.7	0.0	61.3
Croatia	29.7	0.3	70.0
Cuba	23.5	0.2	76.4
Cyprus	46.0	0.0	54.0
Czech Republic	53.3	0.2	46.5
Denmark	56.7	1.5	41.8
Dominican Republic	34.4	0.0	65.6
Ecuador	63.2	1.4	35.4
Egypt	38.3	5.5	56.2
Estonia	52.0	0.1	47.9
Ethiopia	20.2	35.7	44.1
Finland	55.8	0.3	44.0
France	47.1	3.8	49.1
Germany	59.6	0.9	39.6
Greece	37.6	3.3	59.2
Guatemala	50.5	1.4	48.2
Hungary	47.4	0.4	52.2
Iceland	46.5	0.0	53.5

TABLE B.3.
Global presence contribution by dimension (2015, in %) (cont.)

Country	Economic	Military	Soft
India	67.4	5.9	26.7
Indonesia	77.7	6.1	16.2
Iran	60.2	1.0	38.8
Iraq	84.3	0.4	15.3
Ireland	75.0	0.2	24.9
Israel	55.1	1.7	43.1
Italy	51.6	4.0	44.4
Japan	47.6	4.2	48.2
Kazakhstan	77.1	0.1	22.9
Kenya	20.5	10.7	68.8
Kuwait	82.7	0.4	17.0
Latvia	48.6	0.3	51.2
Libya	71.4	0.9	27.7
Lithuania	61.7	0.5	37.8
Luxembourg	42.7	0.0	57.3
Malaysia	66.5	1.5	32.0
Malta	55.7	0.0	44.3
Mexico	62.8	0.6	36.6
Morocco	37.9	7.9	54.2
Myanmar	55.5	4.7	39.8
Netherlands	76.5	0.8	22.7
New Zealand	48.7	0.8	50.5
Nigeria	83.5	1.7	14.8
Norway	74.9	0.9	24.1
Oman	83.2	1.3	15.5
Pakistan	29.8	21.1	49.1
Peru	62.7	7.9	29.3
Philippines	51.3	0.9	47.9
Poland	57.5	0.6	41.9
Portugal	45.3	1.5	53.2
Qatar	86.4	0.1	13.5
Republic of Korea	61.4	3.8	34.8
Romania	41.3	2.2	56.5

TABLE B.3.

Global presence contribution by dimension (2015, in %) (cont.)

Country	Economic	Military	Soft
Russian Federation	62.6	9.7	27.7
Saudi Arabia	72.2	1.1	26.7
Singapore	75.6	2.2	22.2
Slovakia	57.3	0.7	42.0
Slovenia	46.9	0.9	52.3
South Africa	57.2	2.1	40.6
Spain	49.0	1.8	49.2
Sri Lanka	55.3	6.9	37.8
Sudan	47.5	2.2	50.3
Sweden	52.0	0.2	47.8
Switzerland	70.8	0.0	29.1
Syria	9.4	0.4	90.2
Thailand	62.6	3.1	34.3
Turkey	36.7	2.9	60.4
Turkmenistan	90.9	0.0	9.1
Ukraine	29.7	1.0	69.3
UAE	80.5	0.2	19.3
United Kingdom	44.2	2.9	52.9
Tanzania	45.7	14.7	39.6
United States	46.0	13.0	41.0
Uruguay	32.0	7.1	60.9
Uzbekistan	48.8	4.2	47.0
Venezuela	70.4	1.5	28.1
Vietnam	74.1	0.4	25.5

TABLE B.4.
Elcano European Presence Index 2015

Country	Index value	Position	Position by dimension	
			Economic	Soft
Austria	162.1	11	10	9
Belgium	321.5	7	5	8
Bulgaria	24.1	23	24	22
Croatia	36.0	21	23	20
Cyprus	12.7	26	27	25
Czech Republic	96.3	14	14	15
Denmark	114.3	13	13	14
Estonia	15.9	25	25	26
Finland	68.8	18	16	19
France	575.2	3	3	3
Germany	731.0	1	1	2
Greece	81.0	16	18	12
Hungary	95.8	15	15	11
Ireland	162.9	10	8	17
Italy	323.2	6	7	5
Latvia	12.5	27	26	27
Lithuania	22.3	24	21	24
Luxembourg	182.7	8	12	6
Malta	8.4	28	28	28
Netherlands	520.5	4	2	7
Poland	128.1	12	11	13
Portugal	76.2	17	17	16
Romania	53.0	19	20	18
Slovakia	39.9	20	19	21
Slovenia	25.6	22	22	23
Spain	355.5	5	6	4
Sweden	168.1	9	9	10
United Kingdom	655.3	2	4	1

TABLE B.5.
European presence share (selected years, in %)

Country	2005	2010	2015
Austria	3.4	3.3	3.2
Belgium	6.9	6.2	6.3
Bulgaria	-	0.6	0.5
Croatia	-	-	0.7
Cyprus	0.3	0.3	0.3
Czech Republic	1.5	1.7	1.9
Denmark	2.7	2.5	2.3
Estonia	0.3	0.3	0.3
Finland	1.3	1.3	1.4
France	12.3	12.0	11.3
Germany	17.1	15.9	14.4
Greece	1.6	2.1	1.6
Hungary	1.9	1.7	1.9
Ireland	2.7	2.9	3.2
Italy	7.7	7.1	6.4
Latvia	0.3	0.3	0.2
Lithuania	0.4	0.4	0.4
Luxembourg	1.4	2.3	3.6
Malta	0.1	0.1	0.2
Netherlands	10.0	9.5	10.3
Poland	1.9	2.1	2.5
Portugal	1.4	1.5	1.5
Romania	-	0.8	1.0
Slovakia	0.7	0.8	0.8
Slovenia	0.4	0.5	0.5
Spain	7.4	7.9	7.0
Sweden	3.3	3.1	3.3
United Kingdom	13.0	13.1	12.9

TABLE B.6.
European presence contribution by dimension (2015, in %)

Country	Economic	Soft
Austria	54.3	45.7
Belgium	74.1	25.9
Bulgaria	48.5	51.5
Croatia	33.4	66.6
Cyprus	39.6	60.4
Czech Republic	52.7	47.3
Denmark	59.7	40.3
Estonia	55.7	44.3
Finland	62.1	37.9
France	57.2	42.8
Germany	57.2	42.8
Greece	38.0	62.0
Hungary	47.1	52.9
Ireland	77.8	22.2
Italy	49.4	50.6
Latvia	52.6	47.4
Lithuania	63.1	36.9
Luxembourg	37.3	62.7
Malta	37.2	62.8
Netherlands	78.5	21.5
Poland	63.4	36.6
Portugal	49.8	50.2
Romania	47.8	52.2
Slovakia	66.0	34.0
Slovenia	52.2	47.8
Spain	49.9	50.1
Sweden	58.7	41.3
United Kingdom	47.5	52.5

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