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## Regional or global player? The EU's international profile

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Iliana Olivie & Manuel Gracia – April 2020



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# Elcano Policy Paper

## Regional or global player? The EU's international profile

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### Abstract

The upcoming 'Geopolitical Commission' has the task of re-thinking several aspects of the EU's foreign policy and global role. This reflection will necessarily build on the current global strategy, published in 2016, which insists on the need for the EU to upscale its military capacities and to focus on its nearest and extended neighbourhood.

By means of the Elcano Global Presence Index, this policy paper aims to depict the EU's international profile while tracking to what extent its features and the objectives of the EU's global strategy are aligned with the volume, nature and geographical allocation of the Union's external projection.

As stated in the EU's global strategy, there is a significant gap between the EU's presence and its international influence. In that same line, and unlike other major international players, its soft profile still needs to be balanced with stronger military capacities. However, despite what the strategic document claims, the EU external projection is strongly concentrated in few facets and member states. This is also linked to its geographical allocation, with a decreasing importance of the near and extended neighbourhood (including candidate countries) with respect non-EU West Europe, Asia, North America and, to a lesser extent, Latin America. Moreover, the exact consequences of Brexit on the EU's global presence remain unknown.

### Introduction<sup>1</sup>

The EU renewed its strategic document for foreign policy and security in 2016. The current strategy (*Shared Vision, Common Action: A Stronger Europe. A Global Strategy for the European Union's Foreign and Security Policy* – henceforth EUGS) (EC, 2016) has been assessed by academic literature from different perspectives. These assessments can prove to be particularly useful, as the upcoming 'Geopolitical Commission' has the task of re-assessing the Union's foreign policy and strategic role (Biscop, 2019).

Some authors focus on the relevance and implementation of its key principles such as, for instance, resilience (Tocci, 2019; Wagner & Anholt, 2016), politicisation (Barbé & Morillas, 2019) and differentiation, co-ownership and flexibility in the EU's relation with its Eastern neighbours (Rodríguez Prieto, 2018). Although according to several assessments the strategy is a realistic guide for the EU's foreign and security policy in the near future (Davis Cross, 2016; Grevi, 2016; Juncos, 2017; K. E. Smith, 2017), it is also seriously challenged by the Brexit process (Biscop, 2016; Sidiropoulos, 2016; K. E. Smith, 2017). Moreover, it has also been claimed that this strategic document might be failing to address the current transitional order (Howorth, 2016; Newman, 2018).

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<sup>1</sup> The authors are grateful to Davide Rognini for his invaluable research assistance.

From a geographical perspective, the strategy focuses on the EU's immediate borders and extended neighbourhood, adopting a regional rather than global approach (Dijkstra, 2016; Grevi, 2016; Juncos, 2017; Winn, 2019).<sup>2</sup> In this vein, neighbouring countries such as those included in the European Neighbourhood Partnership (ENP) (Johansson-Nogués, 2018), the MENA region (Harders, Jünemann, & Khatib, 2017) and Russia (Korosteleva, 2019) are now depicted as a source of challenges and this is also reflected in the approach to specific external actions or policies, such as migration (Ceccorulli & Lucarelli, 2017) and security (Legrand, 2016).

This policy paper aims to contribute to the debate by exploring the EUGS –both its claims on the nature of the EU's external projection and its objectives regarding foreign action– from the perspective of the Elcano Global Presence Index. First, it details the gap between the EU's global presence and its level of international power; secondly, it looks at the nature of its presence (soft, hard, technological...); third, it focuses on the domestic construction of the Union's projection; and, finally, it looks at its geographical composition by destination.

Regarding the domestic grounds of the EU's global presence, the Union is here defined including the UK, in accordance with the EU as defined in the EUGS and taking into consideration that although Brexit has recently come to pass, a transition period will follow until the end of 2020. Moreover, as detailed below, the exact consequences of Brexit for the Union's external projection remain unknown.

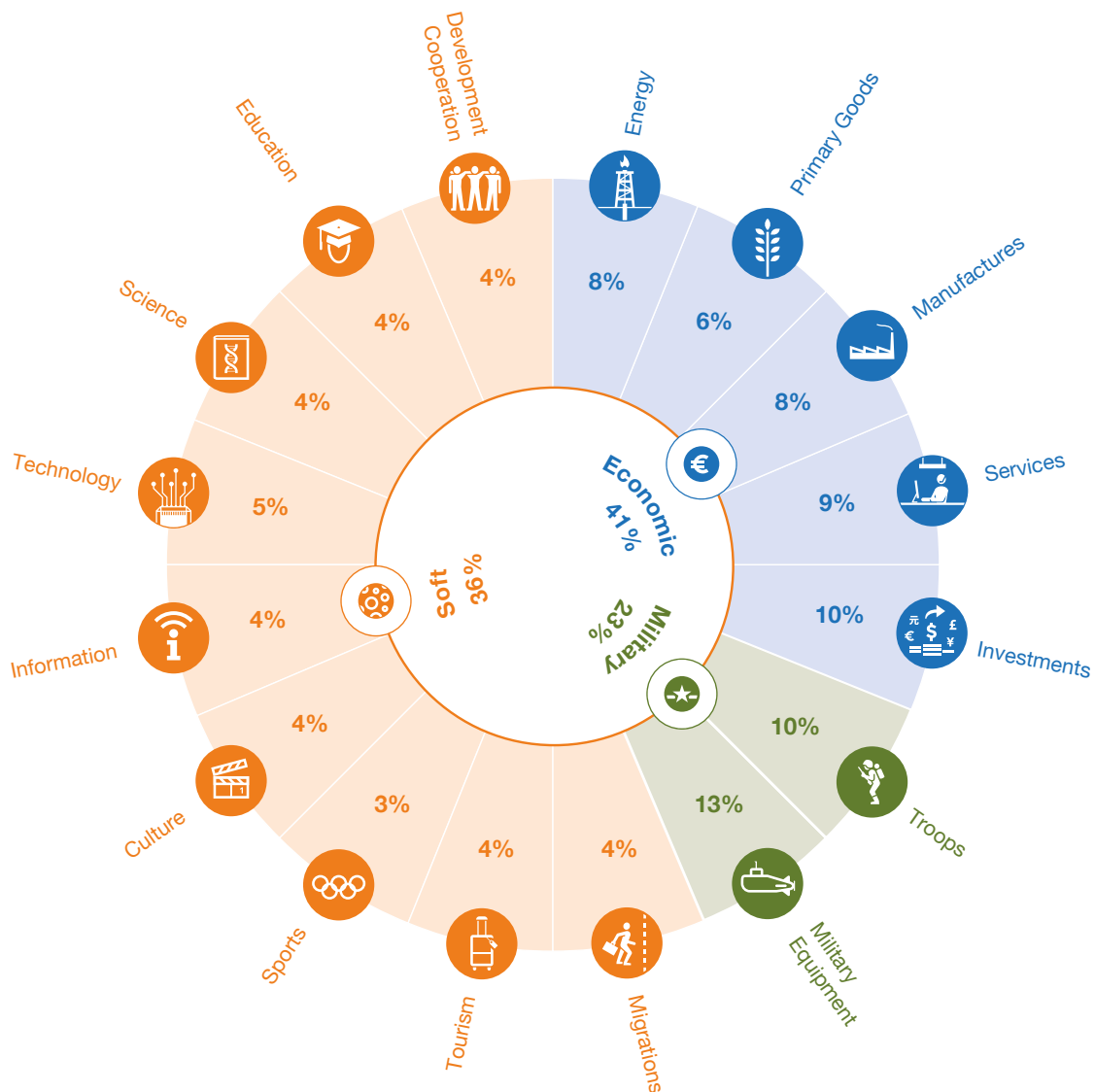
The Elcano Global Presence Index aims to reflect to what extent (and on what grounds) countries or groups of countries project themselves beyond their borders on the basis of three dimensions –economic, military and soft– that comprise 16 variables –from primary goods to military capacities and development cooperation–. The Index's objective is twofold. On the one hand, it hopes to contribute to the debate on conceptualising and measuring the globalisation process. On the other, it assesses the foreign policy of the countries included in the calculation, for instance, by comparing efforts and means versus the actual level of international presence, by defining sectoral presence profiles and by establishing a relation between presence and influence. Consequently, its second object is to provide a tool for foreign policy making (see Figure 1).

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<sup>2</sup> To this, (M. E. Smith, 2016) argues that, much to the contrary, the geographical approach of the EUGS is still too broad and not sufficiently focused on the European neighbourhood.



Figure 1. The Elcano Global Presence Index



Source: Elcano Royal Institute, Elcano Global Presence Index.

Since the first publication of the Index in 2011 (Olivé & Molina, 2011), and on a regular basis, it has calculated the projection of an increasing number of countries (up to 120 in the latest edition). To these, the EU (as a single entity) was added in the 2012 edition. Roughly, this is achieved by adding the EU member states' global presence and deducting intra-European international exchanges.<sup>3</sup> This also allows the EU to be calibrated as an international player, leads to an understanding of the different contributions of the 28

<sup>3</sup> For further details on this methodology, see (Olivé & Gracia, 2018b).

member states in different dimensions (eg, the economic, military and soft) and specific variables (from troop deployments to international aid) and helps determine the Union's softer or harder projections (Olivíe & Gracia, 2018c).

Although all these data and analyses have proved to be a useful tool for understanding key aspects of the EU's global role, significant questions remain that are addressed in the EUGS. These refer to the geographical breakdown of the EU's global presence, such as, for instance, the magnitude of its transatlantic links and its bonds with its immediate and enlarged neighbourhood (which is, as mentioned above, one of the EUGS's key geographical concepts). Answering these questions poses an important methodological challenge as it requires conceptualising the geographical distribution of certain indicators (such as military capacity and science) and combining the Index database and sources with additional official national and/or European data sources.<sup>4</sup> The results, however, provide a good basis for analysing the geographical pattern of external relations outlined in the EUGS.

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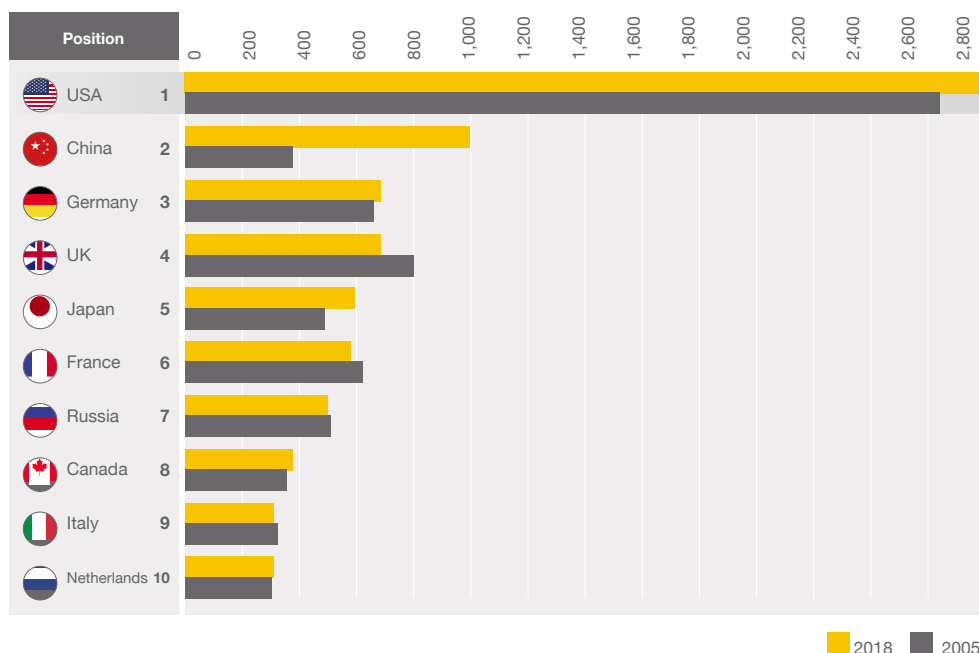
<sup>4</sup> A similar disaggregation was also carried out for the pilot case on one member state, Spain. Details on the methodology and results can be found in (Olivíe, Gracia, & Gomariz, 2017).

# 1 Presence, not power

As the EUGS says, ‘the purpose, even existence, of our Union is being questioned. Yet, our citizens and the world need a strong European Union like never before. [...] Our diplomatic network runs wide and deep in all corners of the globe. Economically, we are in the world’s G3. We are the first trading partner and the first foreign investor for almost every country in the globe. Together we invest more in development cooperation than the rest of the world combined. It is also clear, though, that we are not making full use of this potential yet’ (EC, 2016, p. 3).

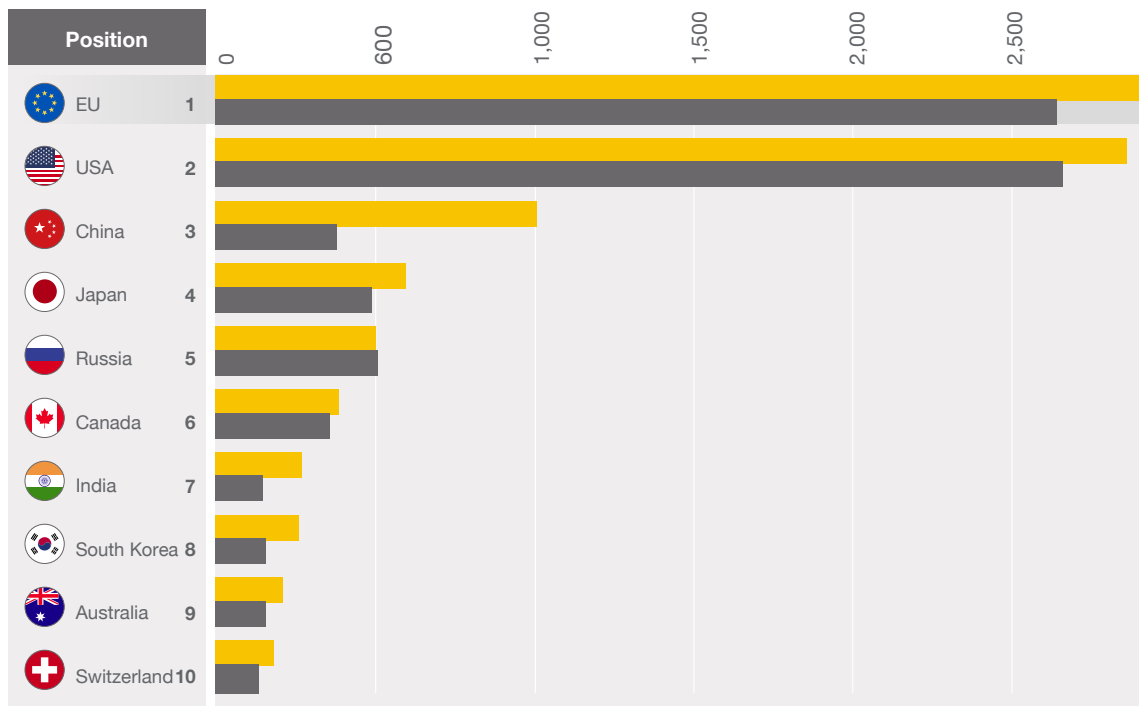
The EU does, indeed, project a high volume of global presence, compared with other countries or country groupings. Five EU member states appear among the top-10 positions in the Elcano Global Presence Index (see Figure 2). These are Germany, which ranks third, followed by the UK (fourth), France (sixth), Italy (ninth) and the Netherlands (10th). Two additional member states (Spain and Belgium) are among the top-20 positions and four others (Sweden, Ireland, Austria and Denmark) are among the top 30, out of 120. Moreover, if we calculate the global presence of the Union as if it were a single country, the EU tops the ranking, followed closely by the US (see Figure 3). In other words, the intensity of the international exchanges, indicated by the EUGS, in trade, investment and development cooperation, added to the volumes of projection in the military field, migration, tourism, sports, culture, information, technology, science and education, define the EU as a major global player, at least potentially.

Figure 2. Top 10 positions in the Elcano Global Presence Index (index value, 2018)



Source: Elcano Royal Institute, Elcano Global Presence Index.

Figure 3. Top-10 positions in Elcano Global Presence Index, including the EU (index value, 2018)



■ 2018 ■ 2005

Source: Elcano Royal Institute, Elcano Global Presence Index.

A 'strong European Union like never before' (EC, 2016, p. 3) would require transforming such a presence into power or influence. Actually, the gap between the EU's presence and power at the global level is somehow pointed out in the EUGS. It is possible to assess the gap when comparing global presence values with those of a power measurement. There are several proposals for defining and measuring international power (Olivié, Gracia, & García-Calvo, 2014). Some of them focus on particular geographical spaces such as cities (the Global Power City Index) or regions (Soft Power in Asia, Asia Power Index). Other indexes assess power in one particular domain of international relations, such as soft (Soft Power 30) or military power (Global Fire Power).

Power is one of the sub-indexes of the Best Countries ranking, published yearly by US News, which aims to classify countries according to how they are perceived in terms of adventure, citizenship, cultural influence, entrepreneurship, heritage, movers, open for business, power and quality of life. Country assessments are made by a selection of over 20,000 individuals from all over the world (McPhillips, 2019).

The comparison of this power ranking position with that held in the global presence ranking can show which countries are punching above or below their weight. Countries with a high global presence (above the average) but low levels of power (below the average) punch below their weight as they do not transform their volume of international projection into the exertion of influence. Conversely, nations with high levels of power (above the average) and relatively low levels of global presence (below the average) are able to transform a fairly scarce global or regional presence into power.

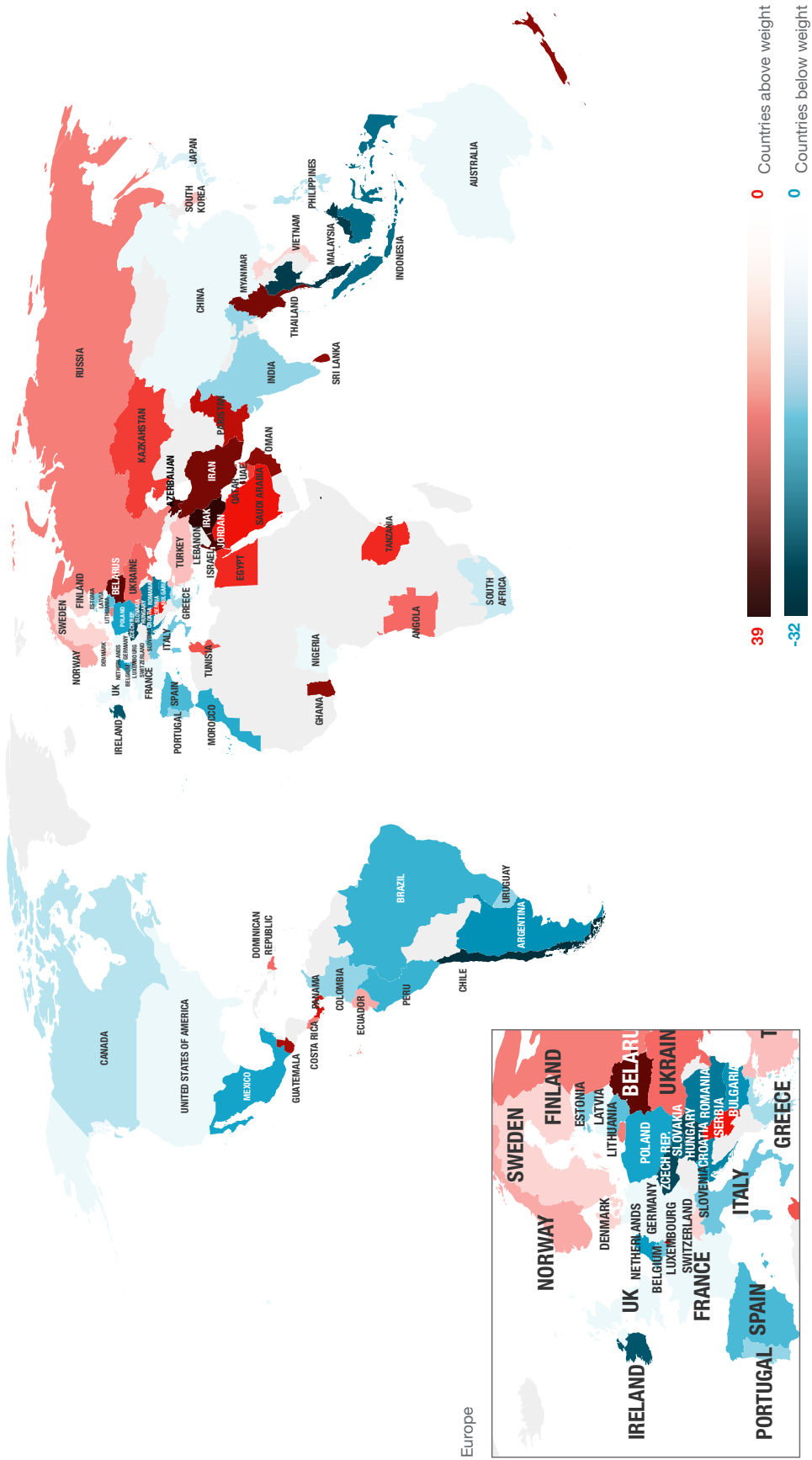
Such a comparison shows that EU countries are, in general terms, fairly mediocre boxers, in line with previous studies (Olivié, 2018; Olivié *et al.*, 2014). Nineteen out of 25 EU member states ranked in both categories project a global presence above the average while exerting power below the average,<sup>5</sup> two hold the same position in both lists (France and Latvia) and only four punch above their weight (Denmark, Finland, Luxembourg and Sweden) (see Figure 4). Meanwhile, several emerging countries, as well as key geopolitical spots like Israel and Saudi Arabia, tend to exert high doses of influence despite a comparatively low level of international projection. This includes key EU partners, as outlined in the EUGS, such as Belarus, Iran and Iraq.

Moreover, the EU diplomatic network really does 'run wide and deep in all corners of the globe'. Lowy's Institute Global Diplomacy Index ranks 61 countries (including 21 EU member states) according to their diplomatic effort in terms of embassies and high commissions, consulates-general and consulates, delegations of multilateral organisations and alternative representative offices to formal diplomatic delegations. According to the index, four EU member states are ranked among the top 10: France is third, Germany seventh, Spain ninth and Italy 10th. Four additional members are ranked between positions 20 and 30: the UK is 11th, the Netherlands 16th, Poland 19th and Greece 20th.

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<sup>5</sup> Belgium, Bulgaria, Croatia, the Czech Republic, Estonia, Germany, Greece, Hungary, Ireland, Italy, Lithuania, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and the UK.

Figure 4. Global presence vs. power (2019 power ranking, 2018 global presence ranking position)



Source: the authors, Elcano Royal Institute, Elcano Global Presence Index and USNews, Best Countries Ranking.

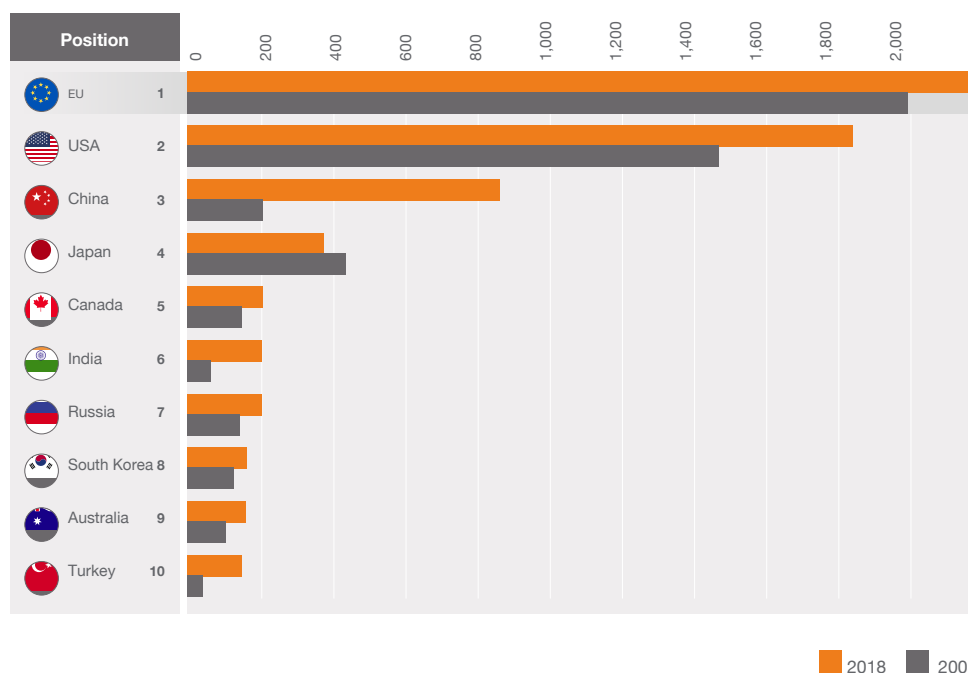
## 2 Not only soft presence

'The European Union has always prided itself on its soft power – and it will keep doing so, because we are the best in this field. However, the idea that Europe is an exclusively “civilian power” does not do justice to an evolving reality' (EC, 2016, p. 4).

International relations literature has extensively dealt with the conceptualisation and measurement of soft power, introduced by Nye (1990) in the early 90s. Probably, the most comprehensive proposal for sizing up this dimension of international influence is Soft Power 30.<sup>6</sup> However, a different approach to soft international relations, limited to countries' presence, can be assessed through the soft dimension of the Elcano Global Presence Index.

Global presence data back this EUGS statement. On the one hand, the EU has been topping the soft presence ranking since 2005, which is the first observation year in this series, therefore allowing for pre- and post-crisis comparisons (Figure 5). There is a substantial gap between the EU's index value (of slightly more than 2,200 points) and that of the US, in the second position with a soft index value of 1,840 points. These are followed by China (860 points) and Japan (373).

Figure 5. Top-10 positions in Elcano Global Presence Index, soft dimension, including the EU (index value, 2005-18)

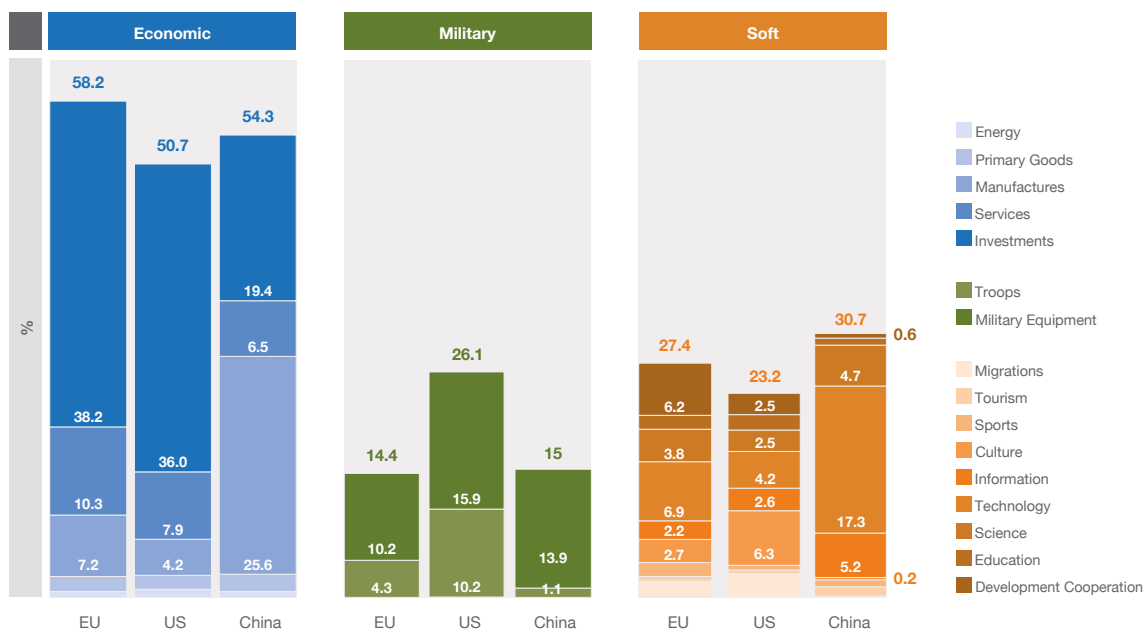


Source: Elcano Royal Institute, Elcano Global Presence Index

<sup>6</sup> See <https://softpower30.com/>.

Moreover, the relative contributions of different variables and dimensions to the EU's global presence show that the Union's external projection is defined, to a greater extent than the US's, by soft drivers. The soft dimension contributes 27.4% to the EU's global presence, while for the US the contribution falls to 23.2% (Figure 6).

Figure 6. Contributions of dimensions and variables to global presence, EU and US (% of total global presence, 2018)

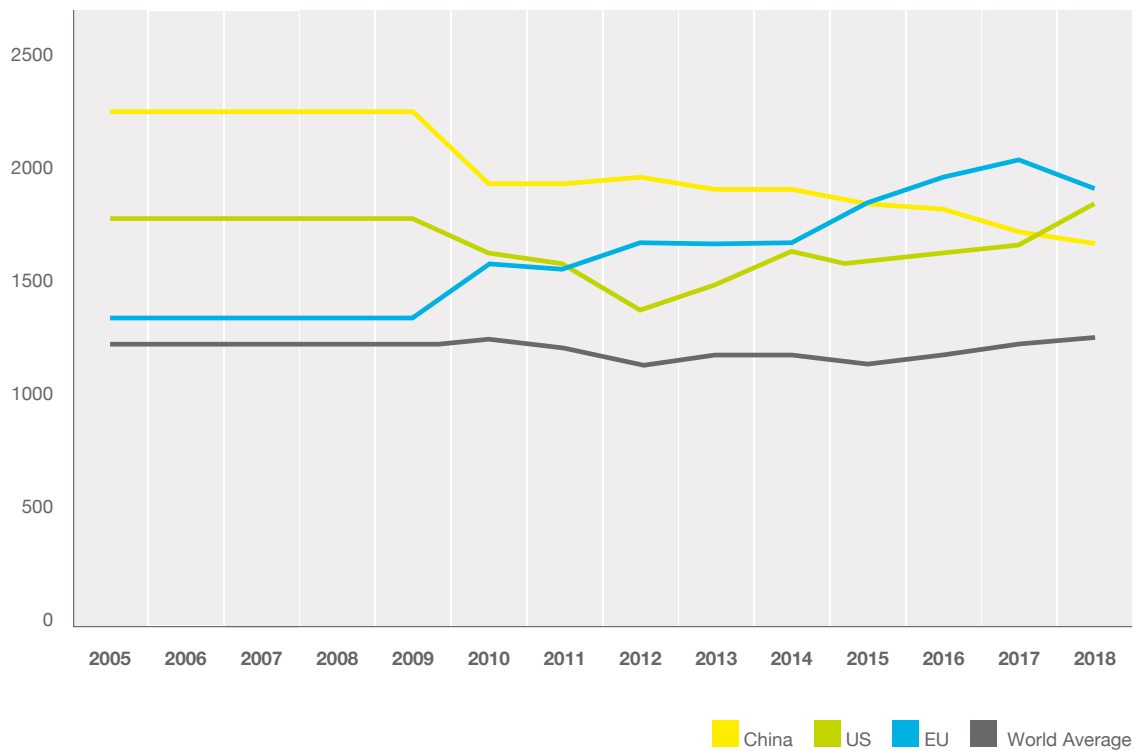


Source: Elcano Royal Institute, Elcano Global Presence Index

The comparison with China also shows interesting results. Perhaps counterintuitively, China's global presence is softer than the EU's, as this dimension's contribution to its global presence stands at over 30% (Figure 7). This is mainly explained by the prevalence of technology in Chinese international relations: the variable contributes to over half of China's soft international projection.



Figure 7. Global presence concentration: the EU, US, China and world average (HHI value points based on 2005-18 data)



Source: Elcano Royal Institute, Elcano Global Presence Index.

“However, the idea that Europe is an exclusively ‘civilian power’ does not do justice to an evolving reality” (EC, 2016, p. 4). As mentioned above, the EUGS emphasises the security dimension in the Union’s external action as well as the diversity of driving factors in the EU’s presence in the world.

This leads to the question of whether the EU is, indeed, a ‘diversified’ international player, with an active role in all types of economic, military and soft fields. In general terms, the Elcano Global Presence Index shows that countries at the top of the global presence ranking are those with a significant presence in a wide variety of international relations. However, this degree of concentration or diversification of forms of presence can evolve and vary from one big player to another. This can be done by applying a concentration index, such as the Herfindahl-Hirschman index (HHI),<sup>7</sup> to global presence data.

7 The Herfindahl-Hirschman index (HHI) is a statistical measure of concentration that accounts for the relative size of all firms in a market. Here it is applied by squaring and aggregating the share of global presence of all countries (si). It can range from 0 to 10,000. An increase shows concentration.  $HHI = \sum_{i=1}^N [S_i^2]$ .

Figure 7 shows that the EU's global presence is more concentrated in variables and dimensions (1,866 points in 2018) than in the case of China (1,626 points) and that Europe's degree of concentration is similar to the US (1,825 points). Moreover, there has been a significant evolution since the beginning of the period in 2005. In 2005 the EU's global presence was more diversified than that of the US and China (1,349 points versus 1,750 and 2,195, respectively). With an increase in the HHI value from 1,350 points in 2005 to a maximum of 2,013 in 2017, the EU has tended to concentrate its global presence in fewer variables and dimensions, with an increasingly stronger contribution of the investment variable and a shrinking military contribution. Nevertheless, the evolution in the last year, with a drop to 1,866 points, could be pointing to a change in pattern.

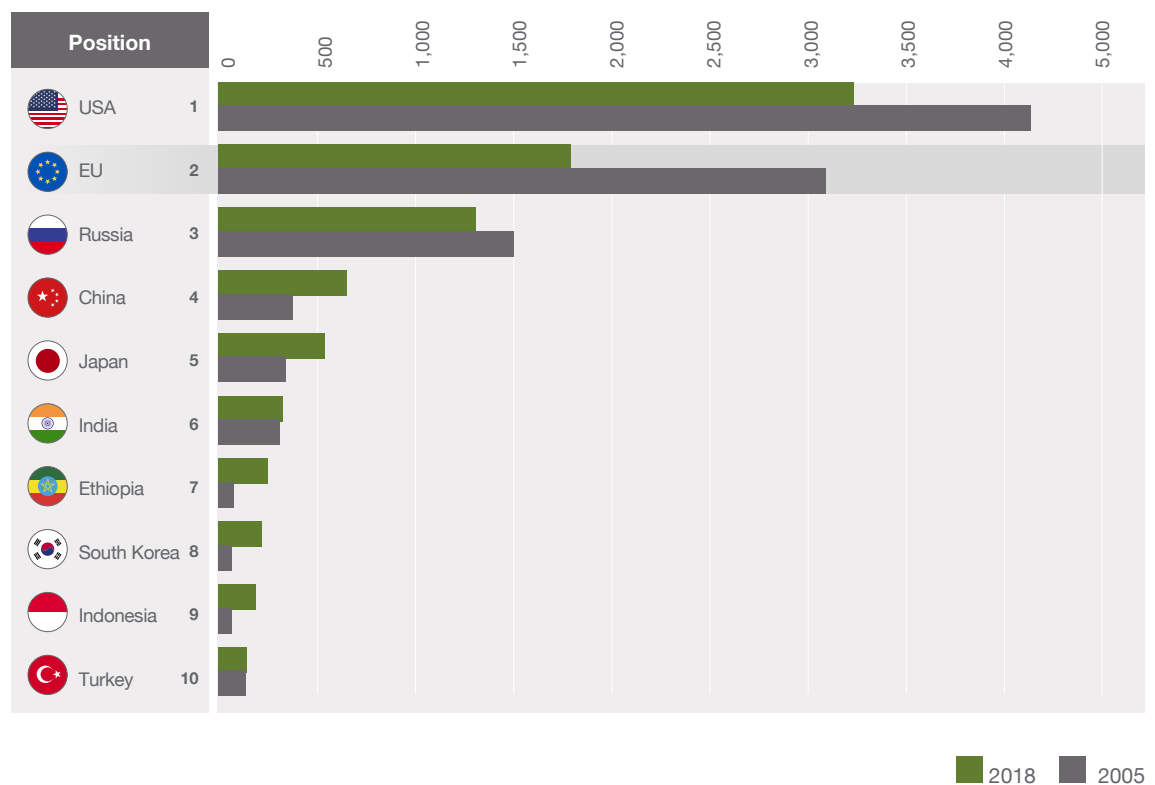
The US global presence was increasingly diversified during the 2005-12 period and then increasingly concentrated. Conversely, China has been steadily diversifying its external projection since the beginning of the period, coinciding with a period of rapid increase in its global presence.

### 3 Towards technology and security

'A more credible European defence is essential also for the sake of a healthy transatlantic partnership with the United States. Member states need the technological and industrial means to acquire and sustain those capabilities which underpin their ability to act autonomously' (EC, 2016, p. 20).

The EU ranks second in military presence, although the military presence index value has massively decreased between 2005 and 2018 (see Figure 8). This is the result of decreased efforts both in relation to internationally deployed troops (Figure 9) and to military capacities (Figure 10).

Figure 8. Top 10 positions in Elcano Global Presence Index, military dimension, including the EU (index value, 2005-18)



Source: the authors, Elcano Royal Institute, Elcano Global Presence Index.

Therefore, the shrinking relevance of the military dimension in defining Europe's external projection has its reflection in the EU's position in the global military sphere. The EU's military presence is currently at 1,811 points, down from 3,100 in 2005. Other 'old powers' record

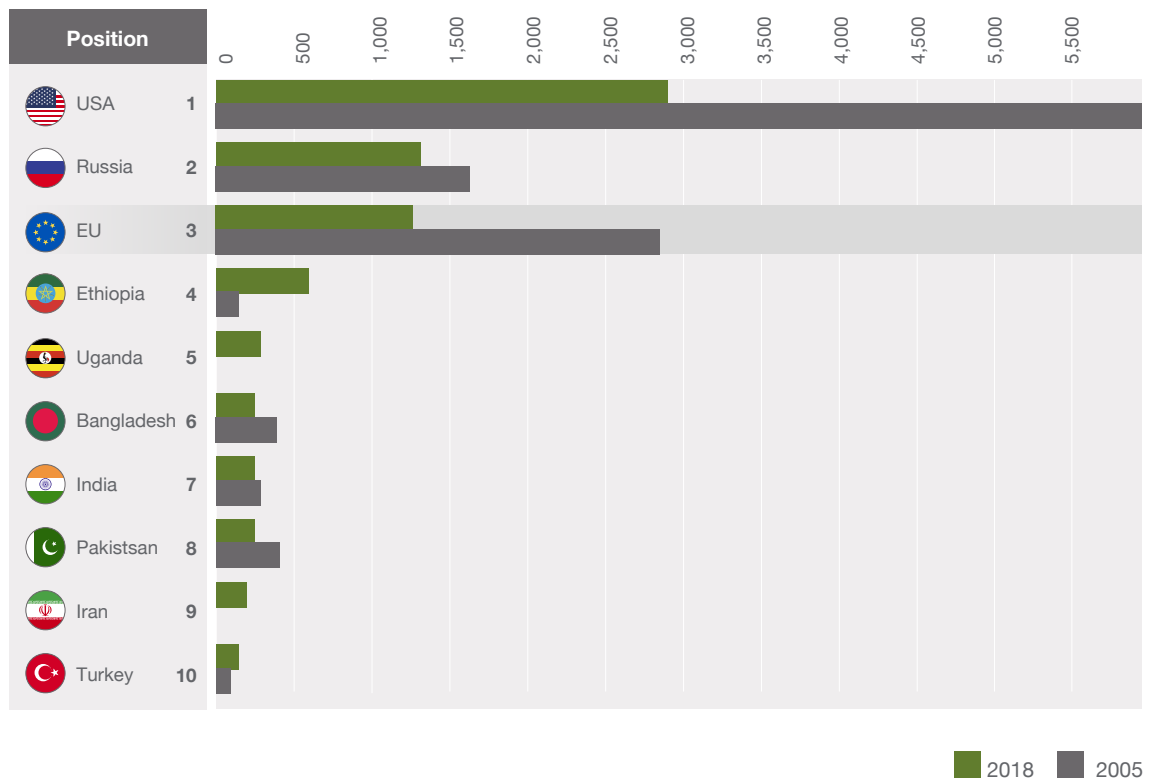
a similar trend: the US military presence has decreased by 906 points since 2005, and that of Russia by 190 during that same period. Old and new Asian global players record the opposite trend, in the framework of the 'military normalisation' of the region at world standards: China holds the fourth position with a 272 point increase in 13 years. Japan is fifth (+ 209 points), India sixth (+42), South Korea eighth (+139), and Indonesia ninth (+121).

While China's military presence has been increasing steadily over this period and the US has been slowly recovering from a deep decrease in the late 2000s, the military presence of the EU recorded decreases in all sub-periods, and, particularly, in the first half of this decade, with a 6.5% decline (figure 11).

The EU's participation is particularly low regarding troops deployed. In this area, the Union falls to the third position, with 1,229 index value points, down from 2,857 in 2005, when it occupied the second position. The US and Russia top the ranking. However, both record the same pattern, with decreasing troops deployed since the mid-2000s. It should be noted, however, that this variable strongly correlates with the incidence of international conflicts and the deployment of UN peacekeeping missions. In this respect, the year of reference, 2005, was marked by the conflict and post-conflict in the Balkans and, particularly, in Kosovo, Bosnia and Serbia.

The decline in US troops deployed abroad is particularly sharp in the second half of the 2000s and the first half the current decade, with declines of up to 7.9% on an annual average. However, there is a slight recovery in the last period (2015-18). It should be noted that, compared with the EU and China, the US has an important number of military bases overseas. Therefore, in this case, variations in troops deployed are necessarily lower as the number of troops deployed in bases overseas records lower variations than those deployed in international conflicts or peace missions. The EU's evolution is in parallel, with decreases of up to 11.8% on average in 2010-15 and a 2.3% increase in 2015-18. China is very different: starting from a 19% annual decrease in 2005-10, it increased its troops deployed at an annual average of over 1,000% in 2010-15 (Figure 12).

Figure 9. Top 10 positions in the Elcano Global Presence Index, troops variable including the EU (index value, 2015-18)



Source: Elcano Royal Institute, Elcano Global Presence Index

The methodology for calculating a country’s military capacity as part of the Elcano Global Presence Index implies that capacities assigned to different countries depend not only on their individual performance but also on that of the rest of the 119 countries (Olivie & Gracia, 2018b). In this respect, the decrease in EU capacities as shown in Figure 10 is also explained by a stronger performance on the part of other global international players.

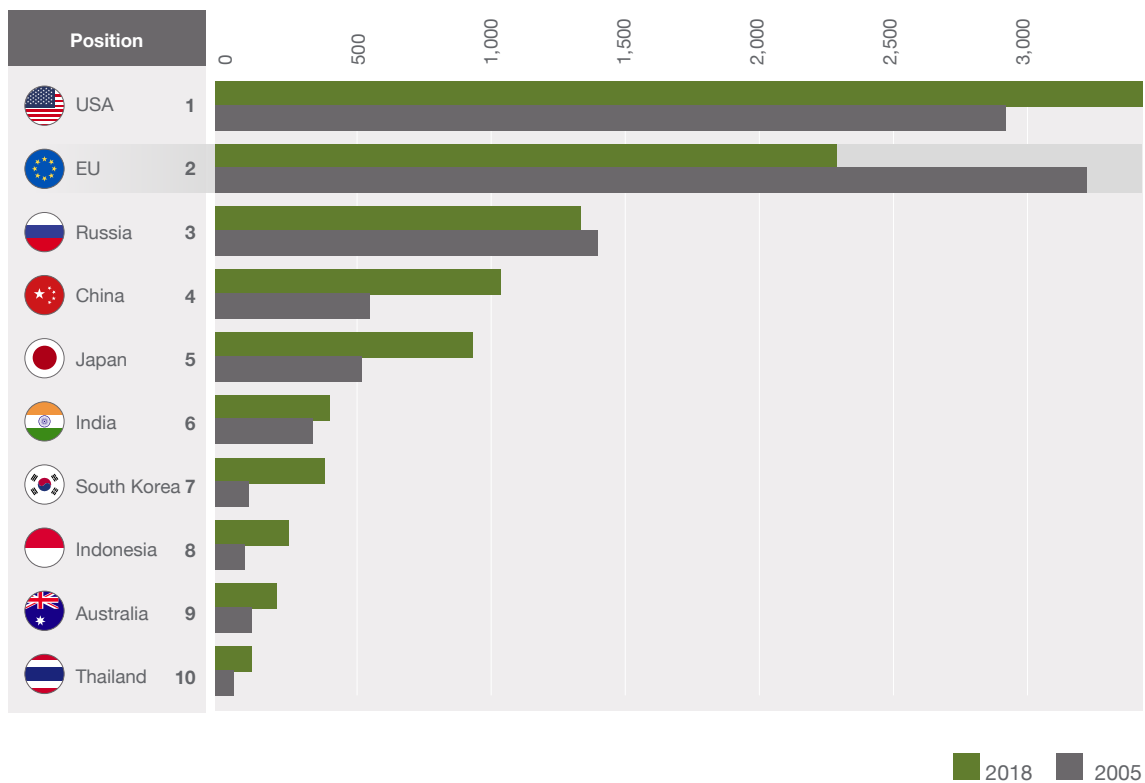
While the EU shows the same trend as in the troop variable, with a 1,028 point decrease since 2005, other global players show the opposite. The US (which tops the ranking), China, Japan, India, South Korea, Indonesia, Australia and Thailand have all increased their military equipment. With the exception of a mild decrease in the case of Russia, the EU is the only global actor with decreasing military capacities among the top-10 positions. Therefore, global presence data back the gap identified by the EUGS when it comes to military capacities.

Unlike China and the US, the EU has been decreasing its military equipment in all sub-periods since 2005. The sharpest decline was recorded in 2015-18, when equipment fell by 3.3% (Figure 11).

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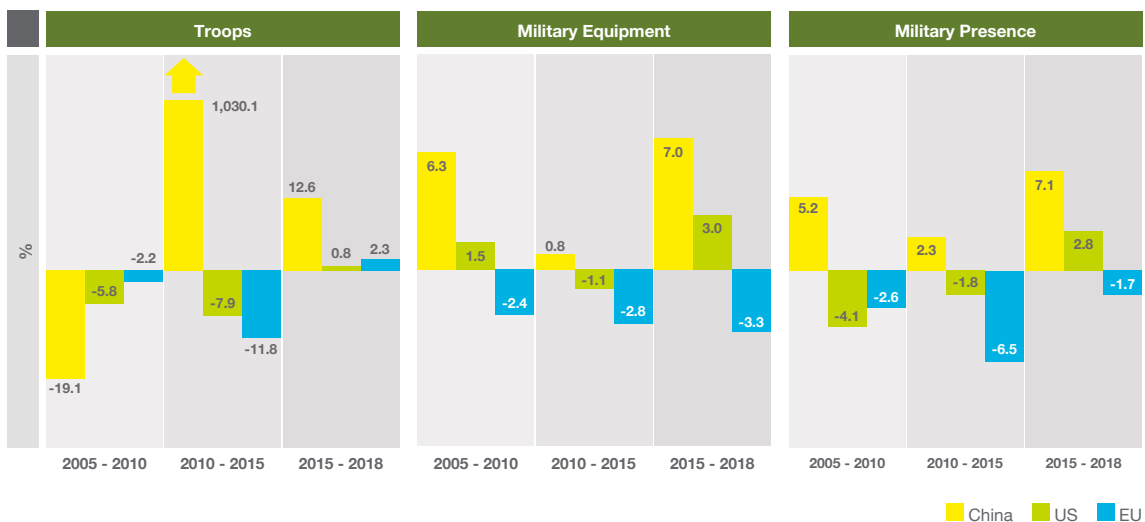
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Figure 10. Top 10 positions in Elcano Global Presence Index, military equipment variable, including the EU (index value, 2005-18)



Source: Elcano Royal Institute, Elcano Global Presence Index

Figure 11. Changes in military presence, EU, US and China, 2005-18 (average annual variation rates, in %)



Source: Elcano Royal Institute, Elcano Global Presence Index.

## 4 The EU's diversity

'Joining all our cultures together to achieve our shared goals and serve our common interests is a daily challenge, but it is also our greatest strength: diversity is what makes us strong' (EC, 2016, p. 4).

One way to observe this diversity is to break down the EU's global presence by geographical origin. The EU's global presence data allows recording the different contributions of the 28 member states. The disaggregation by member state was first calculated in a previous report on the Index results (Olivié *et al.*, 2015), with the aim of providing an input for understanding the construction of the EU's role as a global player.

This claim about the EU's diversity does not really show in the Union's external projection. The EU's global presence is strongly concentrated in a few member states, in line with the increasing concentration by dimensions and variables pointed out above. The top four contributors (the Netherlands, the UK, Germany and France) account for almost 60% of the region's external projection. Twenty-one member states account, each of them, for less than 3% of the aggregate (Figure 12).

The situation in 2005 was roughly the same. The same four countries topped the ranking (although in a different order) and their aggregate contribution was at 66%. It should be noted that the significant increases in the Dutch (10.3 pp) and Luxembourg (7.7 pp) contributions can be explained by their relevance in international investments and the increasing financialisation of this variable (partly due to methodological changes in the source, as detailed in the methodological annex).

With the materialisation of Brexit, the ranking of contributions will obviously be affected, as will be the aggregate global presence of the EU. In this respect, the UK has topped the ranking of member states' contributions in several years due to the strong extra-EU orientation of its global presence when compared with, for instance, Germany, which has a stronger intra-European focus (Olivié & Gracia, 2018c). It is difficult to predict the exact consequences of Brexit on the EU's global presence. On the one hand, it should fall by 15.9%, which is the UK's contribution to the EU's external projection. However, on the other, the aggregate volume of the other 27 member states' external projection directed towards the UK most probably exceeds that contribution. Global presence that has so far been recorded as intra-European will now become extra-European and therefore part of the EU's global presence. In short, the Brexit process will probably result in increasing levels of EU global presence. However, the exact level and evolution of the 27 member states' global presence in the UK will of course depend on the results of the negotiations of the post-Brexit deal.

Brexit will also have an impact on the nature of the EU's global presence. Not all member states contribute to the same extent and through the same variables to the Union's aggregate projection. Although the UK is not a major contributor in the variables of primary goods, manufactures and tourism, it is third in the EU's projection in investments, military equipment and migrations; second in energy, troops, technology and development cooperation; and first in services, sports, culture, information, science and education.

Figure 12. Contributions to the EU's global presence by member state, 2005-18 (in %, variations in percentage points)

Country	2018	2005	Var. 2005-2018 (pp)
Netherlands	18.0%	7.8%	10.3
UK	15.9%	25.1%	-9.2
Germany	14.2%	16.3%	-2.1
France	12.1%	17.8%	-5.7
Luxembourg	8.2%	0.5%	7.7
Italy	6.7%	7.3%	-0.6
Spain	5.1%	6.3%	-1.2
Ireland	2.6%	1.4%	1.2
Sweden	2.4%	2.6%	-0.2
Belgium	2.1%	3.2%	-1.1
Denmark	1.7%	1.9%	-0.2
Austria	1.5%	1.6%	-0.1
Poland	1.4%	0.9%	0.4
Hungary	1.3%	1.0%	0.3
Greece	1.1%	1.9%	-0.8
Cyprus	1.0%	0.1%	0.8
Czech Rep.	0.7%	0.5%	0.2
Finland	0.7%	1.0%	-0.3



<b>Portugal</b>	0.7%	0.8%	-0.1
<b>Romania</b>	0.5%	0.5%	-
<b>Bulgaria</b>	0.5%	0.2%	0.3
<b>Malta</b>	0.3%	0.2%	0.2
<b>Slovakia</b>	0.3%	0.3%	-
<b>Croatia</b>	0.3%	0.2%	-
<b>Slovenia</b>	0.2%	0.2%	-
<b>Lithuania</b>	0.2%	0.1%	-
<b>Estonia</b>	0.1%	0.1%	-
<b>Latvia</b>	0.1%	0.1%	-

Source: the authors, Elcano Royal Institute, Elcano Global Presence Index.

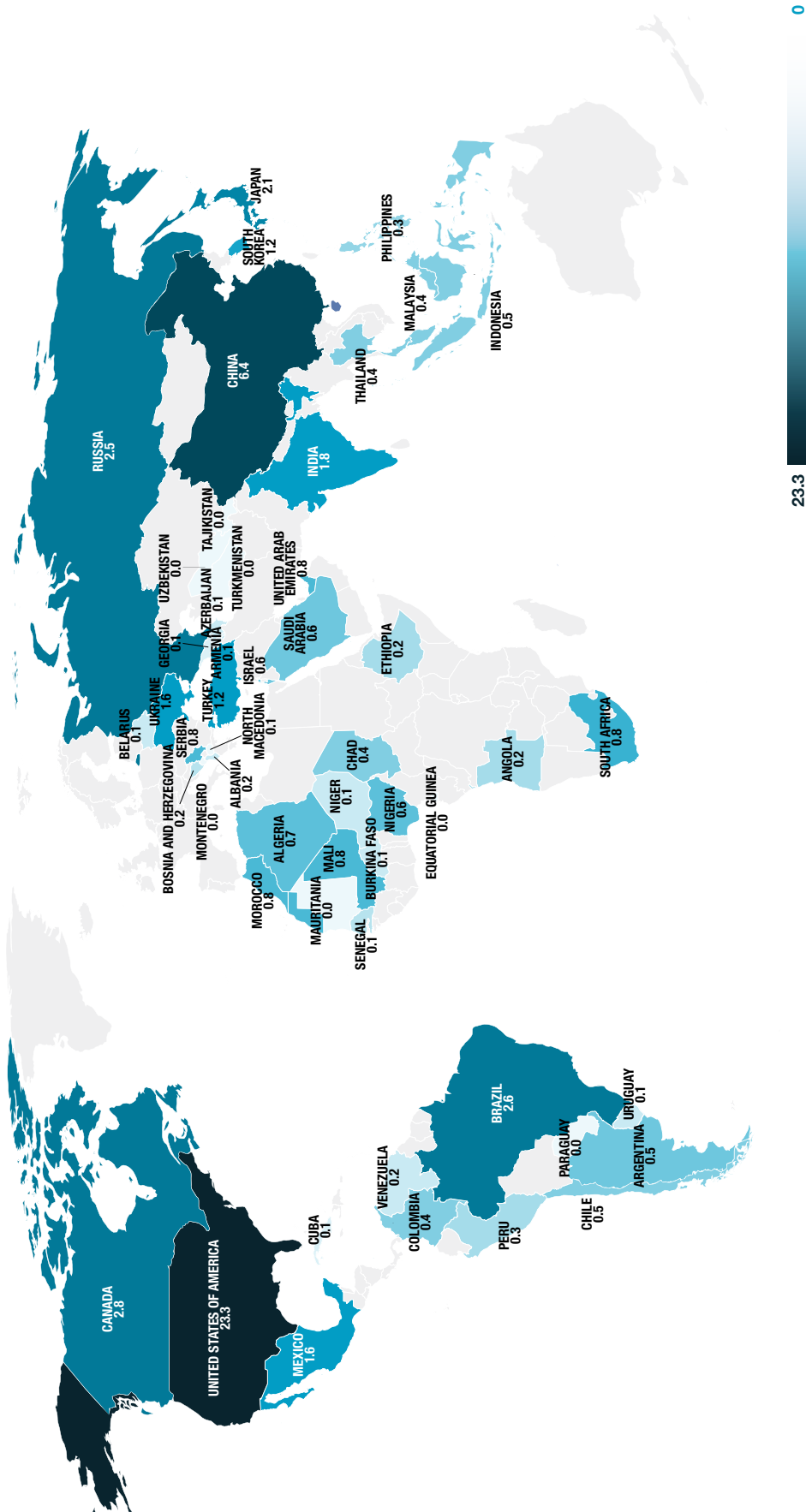


## 5 A closer Atlantic

‘We will keep deepening the transatlantic bond. [...] With the US, the EU will strive for a Transatlantic Trade and Investment Partnership (TTIP). Like the Comprehensive Economic and Trade Agreement (CETA) with Canada, TTIP demonstrates the transatlantic commitment to shared values and signals our willingness to pursue an ambitious rules-based trade agenda’ (EC, 2016, p. 4).

Indeed, the US is the EU’s most important partner and Canada ranks third (see Figure 13). Together, the two countries absorb over a quarter of the Union’s total external projection. Moreover, this ‘transatlantic bond’ has deepened over the past decade: the external projection to the US has increased by 119 index value points or 2.3 percentage points, up to 23.3% of the EU’s total global presence in 2018, up from 21% in 2005. As for Canada, its importance to the EU’s external relations has increased from 2.7% in 2005 to 2.8% in 2018 (that is, 9.7 index value points, see Figure 14). The high degree of concentration of the EU’s global presence in the US is also evident in the significant gap in the global presence share between the US, which is the first destination, and China, which is second. While the US absorbed 23.3% of Europe’s global presence in 2018, China’s share was at 6.4% that same year (see Figure 13).

Figure 13. International distribution of EU's global presence (2018, in % of total global presence)



Source: the authors, Elcano Royal Institute, Elcano Global Presence Index.

Figure 14. The EU’s global presence in the US and Canada, 2015-18 (in % of total global presence, index value points and percentage points)

Country	Global presence (index value)			Share of global presence (%)			2005-18 Variation (index value and pp)	
	2005	2010	2018	2005	2010	2018	Index value	Share (pp)
United States	555.0	608.7	674.0	21.0	21.4	23.3	119.0	2.3
Canada	71.8	86.6	81.4	2.7	3.1	2.8	9.7	0.1

Source: the authors, Elcano Royal Institute, Elcano Global Presence Index.

As mentioned above, the EUGS underlines the economic nature of these transatlantic relations. Global presence data back this statement: 19.7% of the EU’s total global presence is defined by economic ties with the US. For historic reasons, there is no European military projection in North America (although there are US troops deployed in Europe) while soft links with this country account for 3.6% of the EU’s total global presence. Although the latter share is of great importance –higher than the aggregate share of European presence in significant partners such as Japan, India or the entire Mercosur–, it also shows that the nature of European links with the US is essentially economic (see Figure 15).

The EU’s global presence in Canada shares the same features: strongly economic (2.2%), with no military ties and a much lower share of soft links (0.7%) (see Figure 15).

Moreover, the importance of the economy has increased over the past 13 years as shown in the share of economic presence in both countries, which is now higher than in the mid-2000s (by 2.9 percentage points in the case of the US and by 0.3 percentage points for Canada). In both cases, the share of soft presence has decreased in parallel (0.5 percentage points in the US and 0.1 in Canada) (see Figure 15).

Figure 15. The EU’s global presence in the US and Canada by dimensions, 2015-18 (in % of total global presence and percentage points)

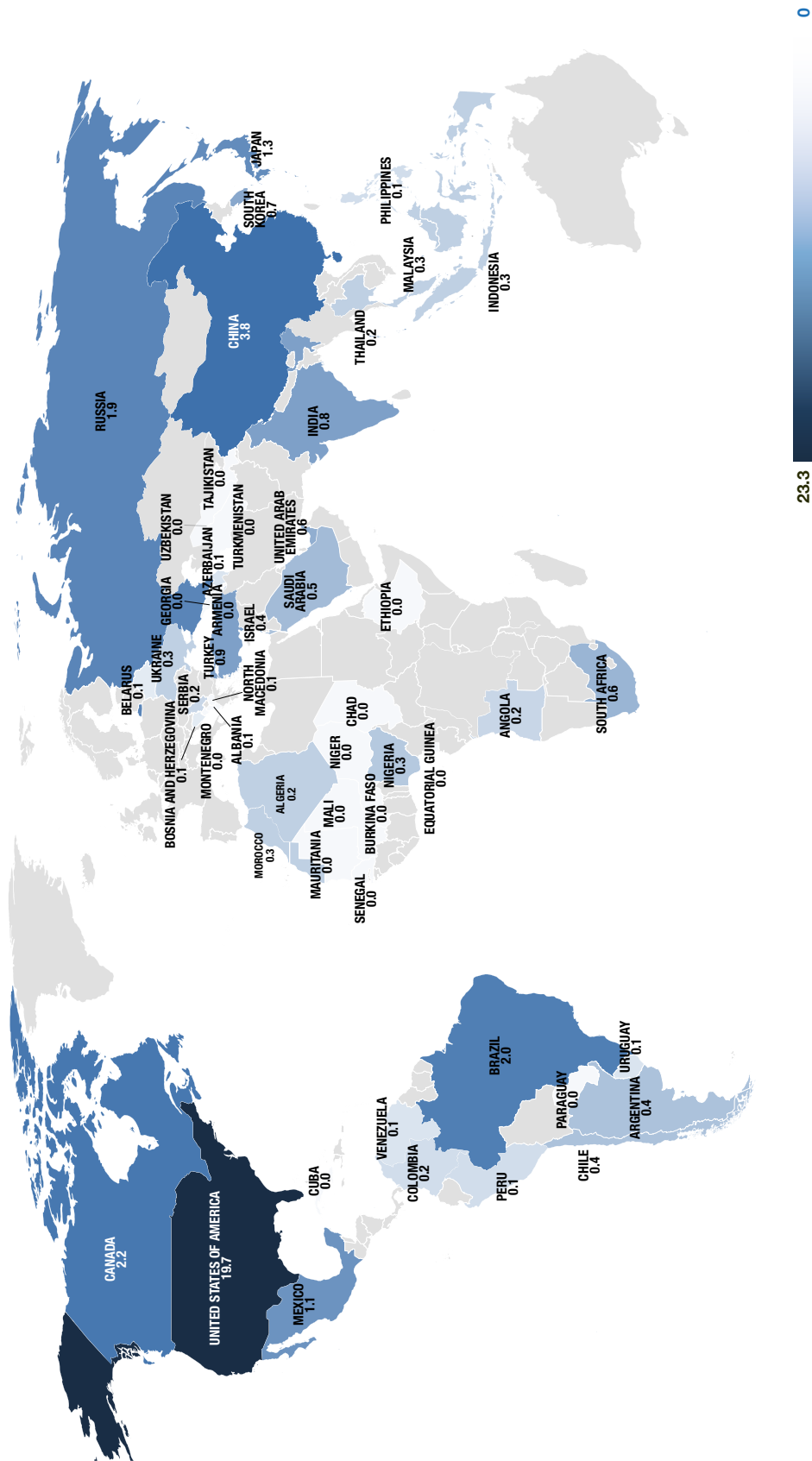
Country	2018 Global presence composition by dimension (%)			2005 Global presence composition by dimension (%)		
	Economic	Military	Soft	Economic	Military	Soft
United States	19.7	0	3.6	16.8	0	4.1
Canada	2.2	0	0.7	1.9	0	0.8

Source: the authors, Elcano Royal Institute, Elcano Global Presence Index.

These EU-US economic ties are mostly driven by the investments variable, which accounts for 15% of the EU's total global presence in 2018, very much in line with the general features of the EU's external projection (see Figure 6). Such a distribution is due to a variety of factors, including geographical reasons (the fact that the Atlantic Ocean favours direct investments for access to providers and consumers, versus trade links) and the magnitude of the US economy (with a massive domestic market with strong consumption capacities).

The economic bias in the EU's relations with the US is also evident in the gap between the share of economic presence with the US (19.7% of the EU's total global presence) and that with other important partners such as China (3.8), Brazil and Russia (2%) (see Figure 16).

Figure 16. International distribution of the EU's economic presence (2018, in % of total global presence)



Source: the authors; Elcano Royal Institute, Elcano Global Presence Index.





## 6 Our neighbours

'We have learnt the lesson: my neighbour's and my partner's weaknesses are my own weaknesses [...] It is in the interests of our citizens to invest in the resilience of states and societies to the east stretching into Central Asia, and south down to Central Africa' (EC, 2016, p. 4).

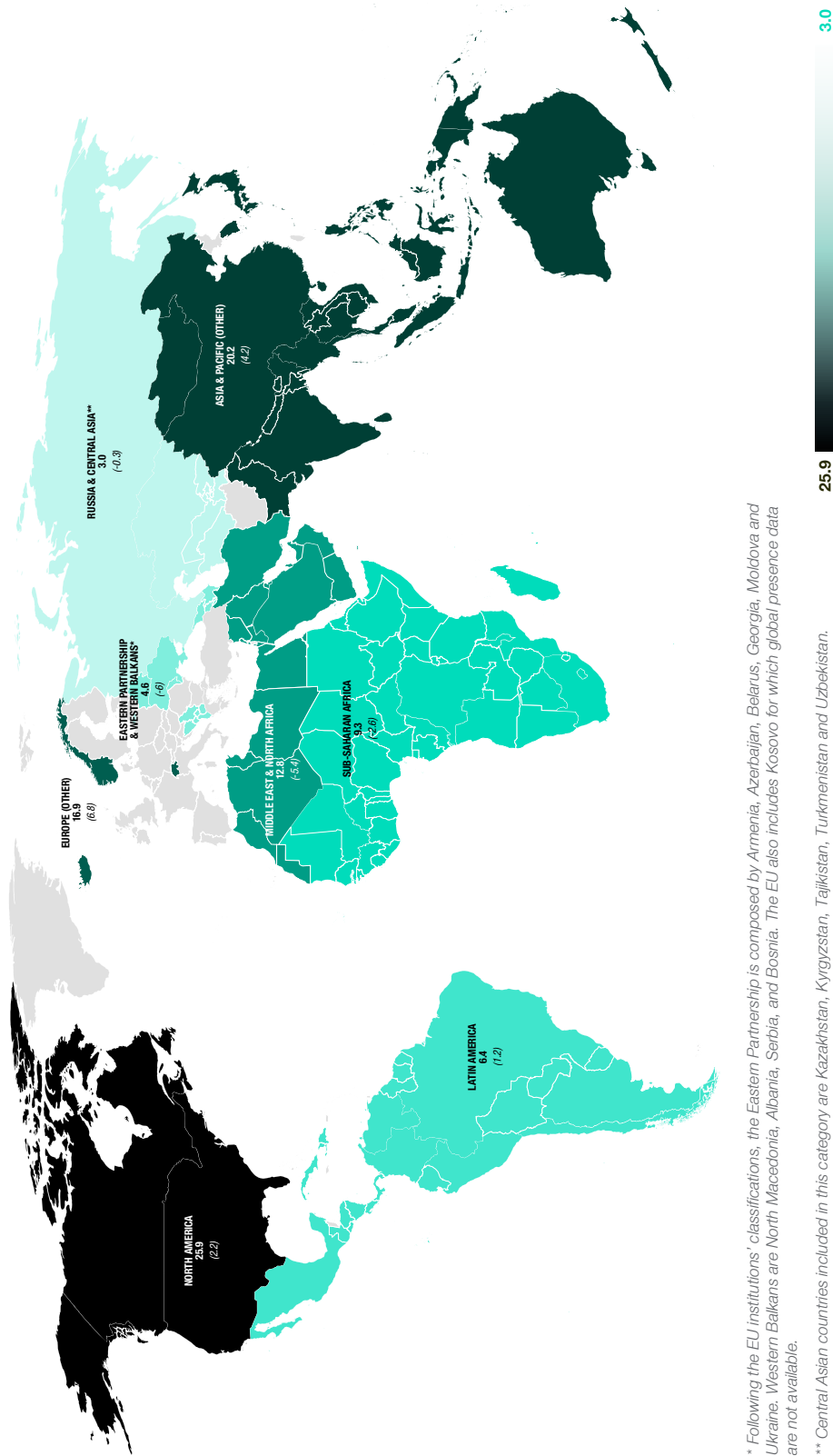
According to several studies, the strategy takes a more regional (rather than global) approach to the Union's external relations. The neighbourhood is re-conceptualised in two distinct categories, with the closest neighbours (North Africa, the Middle East and Eastern Europe) and an extended neighbourhood that includes the neighbours' neighbours (Sub-Saharan Africa and Central Asia). The EU's global presence can be broken down following this regional re-conceptualisation in order to track the relative importance of these first and second 'belts' (see Figure 17).

Despite what the strategy assumes, as well as several of its assessments, the EU's nearest neighbourhood is not the region where the greatest share of the Union's global presence is projected. This category accounts for 17.4% of the EU's external presence, less than the share channelled to North America (which comprises only two countries). Adding the 'farther' neighbourhood increases the share to 29.7%. This group is the first destination of the EU's external action. However, it must be noted that this very broad category includes a very large number of countries, populations and economies, substantially higher than the number of countries included in any other region included in Figure 17.

Moreover, the EU's external projection in the 'enlarged neighbourhood' has decreased by 14.4 percentage points (over 274 index value points) in only 13 years.

It could be argued that this result is biased by the definition of the period, as in 2005 the EU was strongly involved in its neighbourhood due to the conflict in the Balkans. Indeed, external projection to this sub-region has decreased by over 7 percentage points, mostly due to a retrenchment in the military dimension, as we shall see in the following section. However, although to a lesser extent, the rest of the neighbourhood shows a similar trend. While Central Asia and the Eastern Partnership capture roughly the same share of the EU's global presence as at the beginning of the period (mostly due to an increased share in Ukraine), its global presence in the Middle East and North Africa and in Sub-Saharan Africa is down by 5.4 and 2.6 percentage points, respectively. It should be noted, however, that the EU's projection in Sub-Saharan Africa rose from 8.6% in 2010 to 9.3% in 2018. Therefore, after a sharp decrease in the second half of the 2010s, there has been a recovery that might lead to a change of trend, in line with the EU's stated priorities towards the region.

Figure 17. EU global presence by regions, 2005-18 (in % of total global presence, index value points and percentage points)



\* Following the EU institutions' classifications, the Eastern Partnership is composed by Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine. Western Balkans are North Macedonia, Albania, Serbia, and Bosnia. The EU also includes Kosovo for which global presence data are not available.

\*\* Central Asian countries included in this category are Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan.

Source: the authors, Elcano Royal Institute, Elcano Global Presence Index.

## 7 Enlargement

‘Within the scope of the current enlargement policy, the challenges of migration, energy security, terrorism and organised crime are shared between the EU, the Western Balkans and Turkey. They can only be addressed together’ (EC, 2016, p. 24).

Figure 18. EU global presence in candidate countries, 2005-18 (in % of total global presence, index value points and percentage points)

Country	Global presence (index value)			Share of global presence (%)			2005-18 Variation (index value and pp)	
	2005	2010	2018	2005	2010	2018	Index value	Share (pp)
Albania	6.7	5.0	4.5	0.3	0.2	0.2	-2.3	-0.1
Bosnia	11.1	6.4	6.3	1.5	0.4	0.2	-4.8	-1.2
Montenegro *	0.0	1.1	0.8	0.0	0.0	0.0	0.8	0.0
North Macedonia	3.0	2.2	2.8	0.1	0.1	0.1	-0.2	0.0
Serbia	88.1	51.3	22.0	3.3	1.8	0.8	-66.1	-2.6
Turkey	34.7	38.0	36.0	1.3	1.3	1.2	1.2	-0.1
<b>Enlargement</b>	<b>144.2</b>	<b>104.0</b>	<b>72.4</b>	<b>6.2</b>	<b>3.8</b>	<b>2.5</b>	<b>-71.2</b>	<b>-7.2</b>

(1) Following the EU institutions’ classifications, the Eastern Partnership comprises Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine. The Western Balkans comprise North Macedonia, Albania, Serbia and Bosnia. The EU also includes Kosovo, for which global presence data are not available.

(2) The Central Asian countries included in this category are Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan. Source: the authors, Elcano Royal Institute, Elcano Global Presence Index.

The candidates to enter the EU are Albania, Bosnia-Herzegovina, Montenegro, North Macedonia, Serbia and Turkey. As mentioned in the previous section, external projection in these countries has substantially retrenched since the mid-2000s from 6.2% of the EU’s total global presence to only 2.5% in 2018 (see Figures 18 and 19). While Turkey has maintained its share of the EU’s global presence projection at around 1.2%, the Union’s presence in Serbia has dropped by 2.6 percentage points over the same period. Something similar has happened with Bosnia, with a 1.2 percentage point drop, while the EU’s presence in Albania, Montenegro and North Macedonia was and still is almost non-existent (see Figure 18).

Figure 19. EU global presence in candidate countries by dimensions, 2005-18 (in % of total global presence and percentage points)

Country	2018 Global presence composition by dimension (%)			2005 Global presence composition by dimension (%)		
	Economic	Military	Soft	Economic	Military	Soft
Albania	0.1	0.0	0.1	0.0	0.1	0.1
Bosnia	0.1	0.1	0.1	0.1	1.3	0.1
Montenegro *	0.0	0.0	0.0	0.0	3.2	0.0
North Macedonia	0.1	0.0	0.0	0.0	0.0	0.0
Serbia	0.2	0.4	0.2	0.0	3.2	0.1
Turkey	0.9	0.0	0.4	0.9	0.0	0.4

(1) Following the criterion applied in similar cases, records for Montenegro are null in 2005, when the country did not exist. Eventual projection in Montenegro's territory is recorded in Serbia for this year.  
Source: the authors, Elcano Royal Institute, Elcano Global Presence Index.

As expected, the sharp decrease in the EU's global presence in the Balkans has to do with the contraction of the military dimension. The latter has dropped from 3.2% of the EU's total global presence in 2005 both in Montenegro and Serbia to only 0% and 0.4%, respectively, in 2018. Moreover, the contraction of the military presence has not given way to other economic and/or soft forms of external projection. As for Turkey, the nature of the EU's ties with the country has remained constant over the past 13 years (see Figure 20).

## 8 Latin America: the wider Atlantic space

'In the wider Atlantic space, the Union will expand cooperation and build stronger partnerships with Latin America and the Caribbean, grounded on shared values and interests. [...] We will [...] build on the Political Dialogue and Cooperation Agreement with Cuba, and invest in deeper socio-economic connections with Latin American and Caribbean countries through visa facilitation, student exchanges, twinning, research cooperation and technical projects. We will also actively support the negotiation and implementation of peace agreements in the region, as we are doing in Colombia' (EC, 2016, p. 37).

Previous analyses on global presence results for Latin America show that the region is lagging behind as a global actor (Olivie & Gracia, 2018a). Its weight in the international scenario is well above that of other regions such as North America, Europe and Asia. Moreover, contrary to what is occurring in other developing regions, its share of added global presence is steadily decreasing.

Figure 20. EU global presence in selected Latin American counties, 2005-18 (in % of total global presence, index value points and percentage points)

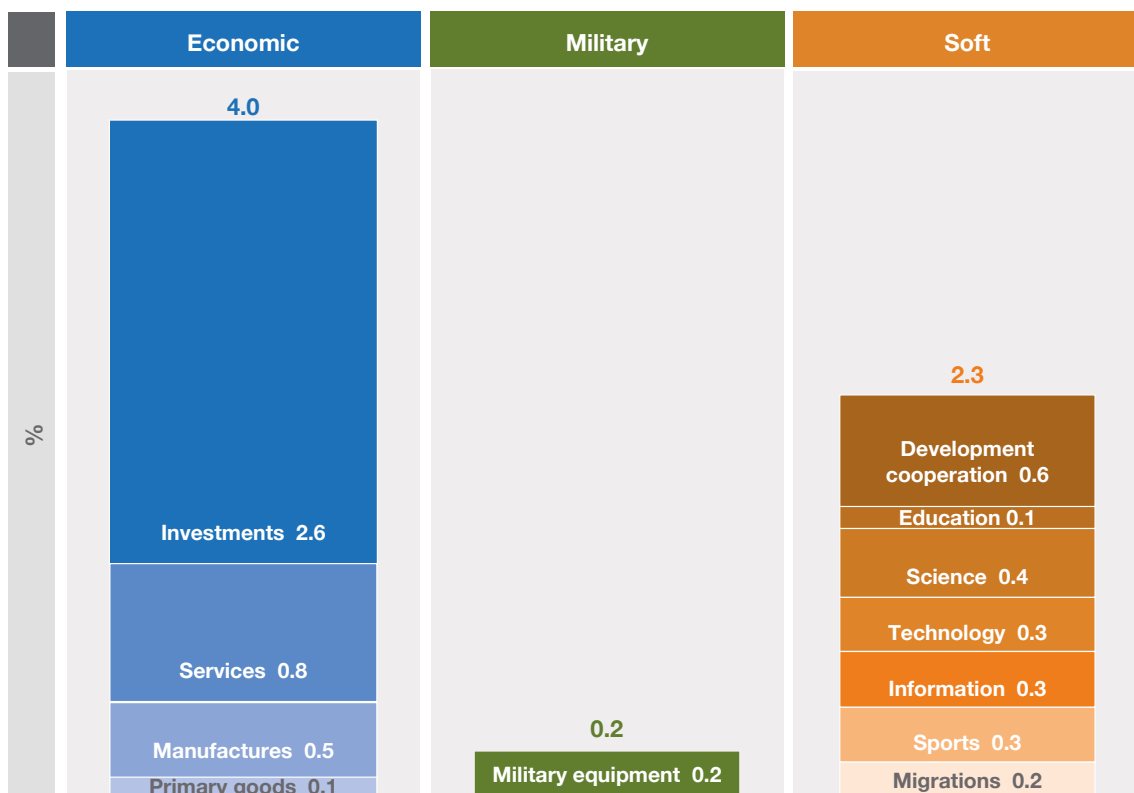
Country	Global presence (index value)			Share of global presence (%)			2005-18 Variation (index value and pp)	
	2005	2010	2018	2005	2010	2018	Index value	Share (pp)
Chile	8.8	14.6	14.6	0.3	0.5	0.5	5.8	0.2
Colombia	7.0	10.6	10.6	0.3	0.4	0.4	3.6	0.1
Cuba	1.4	2.6	2.6	0.1	0.1	0.1	1.2	0.0
Mexico	32.1	46.7	46.7	1.2	1.6	1.6	14.5	0.4
Venezuela	5.0	4.4	4.4	0.2	0.2	0.2	-0.6	0.0

Source: the authors, Elcano Royal Institute, Elcano Global Presence Index.

Despite the region's decreasing importance in the international sphere and that it absorbs a marginal share of the EU's global presence (6.4% in 2018), and contrary to what occurs with the extended neighbourhood and the stated priorities of the EUGS, the share of the EU's external projection in the region has mildly increased by 1.2 percentage points over the past 13 years (see Figure 17).

The share of the EU's global presence in the two priority countries highlighted in the strategic document (Colombia and Cuba) is very low (at 0.4 and 0.1% of the EU's total global presence, respectively) (see Figure 20). The share has barely changed since 2005.

Figure 21. EU global presence in Latin America by dimensions and variables (2018, in % of total global presence)



Source: the authors, Elcano Royal Institute, Elcano Global Presence Index.

The EU's global presence in Latin America is mostly economic (4.0 out of 6.4 percentage points –see Figure 21–) and strongly based on European direct investments in the region. However, as mentioned above, it is the soft dimension (which currently accounts for only 2.3 percentage points) that the EUGS aims to emphasise. Education, migration, tourism, science and technology, that are all directly or indirectly pointed out in the EUGS, together account for 1% of EU global presence (see Figure 21).

## 9 A connected Asia

'The EU will deepen trade and investment with China, seeking a level playing field, intellectual property rights protection, greater cooperation on high-end technology, dialogue on economic reform, human rights and climate action. [...] In parallel, the EU will deepen its economic diplomacy in the region, working towards ambitious free trade agreements with strategic partners such as Japan and India, as well as ASEAN member states' (EC, 2016, p. 38).

Asia and the Pacific (excluding Central Asia, which is part of the extended neighbourhood) account for over 20% of the EU's global presence (see Figure 17), well above Latin America's share. Moreover, the share has increased by 4.2 percentage points since 2005. This increase is only comparable to that of non-EU Europe (excluding European countries that are part of the extended neighbourhood) and strongly contrasts with the diminishing importance of the extended neighbourhood for the EU's global presence. In other words, between 2005 and 2018, the EU's global presence has shifted from the extended neighbourhood to other non-EU European countries, Asia and the Pacific, North America and Latin America.

A great deal of the EU's external projection in Asia is concentrated in China (6.4 out of 20.2 percentage points) and, to a lesser extent, Japan, India and Indonesia. It is also worth noting that, within the region, the EU's global presence has shifted from Japan (which has lost 1.2 percentage points in 13 years) to China (which has gained 1.6 percentage points) but also to other countries such as India (+0.3 pp) and Indonesia (+0.1) (see Figure 22).

Figure 22. EU global presence in selected Asian countries, 2005-18 (in % of total global presence, index value points and percentage points)

Country	Global presence (index value)			Share of global presence (%)			2005-18 Variation (index value and pp)	
	2005	2010	2018	2005	2010	2018	Index value	Share (pp)
China	127.8	157.3	185.2	4.8	5.5	6.4	57.4	1.6
India	38.6	44.6	50.8	1.5	1.6	1.8	12.1	0.3
Indonesia	10.4	13.4	14.3	0.4	0.5	0.5	3.9	0.1
Japan	87.2	71.0	61.5	3.3	2.5	2.1	-25.6	-1.2
Malaysia	8.9	10.5	10.8	0.3	0.4	0.4	1.9	0.0
South Korea	28.7	29.0	34.7	1.1	1.0	1.2	6.0	0.1
Thailand	7.4	9.1	10.4	0.3	0.3	0.4	3.0	0.1

Source: the authors, Elcano Royal Institute, Elcano Global Presence Index.

The economic dimension is an important part of the EU's ties with major Asian partners: 3.8 percentage points out of 6.4 with China, and 1.3 out of 2.1 with Japan. However, soft ties are of great importance. In the case of India, it is the most important dimension (almost one percentage point out of 1.8). Moreover, this has been a dynamic dimension in EU-Asian relations over the past 13 years, with a 0.6 percentage point increase in European relations with China (see Figure 23). These results are in line with the general trend towards a softer nature of the globalisation process (Olivie & Gracia, 2020).

Figure 23. : EU global presence in selected Asian countries by dimensions (2005-18, in % of total global presence and percentage points)

Country	2018 Global presence composition by dimension (%)			2005 Global presence composition by dimension (%)		
	Economic	Military	Soft	Economic	Military	Soft
China	3.8	0.0	2.6	2.8	0.0	2.0
India	0.8	0.0	0.9	0.6	0.0	0.9
Japan	1.3	0.0	0.9	1.8	0.0	1.5

Source: the authors, Elcano Royal Institute, Elcano Global Presence Index.



## 10 Conclusions

According to the Elcano Global Presence Index, the EU is a major international player. However, as acknowledged by the EUGS, its presence does not necessarily transform into power. Moreover, and contrary to the EUGS, its external projection is not exactly the result of very diverse inputs by all member states, as only a few of them are responsible for most of the EU's global presence beyond its borders. Its presence is, moreover, focused on fewer forms of internationalisation and shows a decreasing role in the military sphere.

The EU is a regional player as almost half its external projection is directed towards other non-EU European countries and its extended neighbourhood. However, its external projection shows signs of regionalisation and globalisation in parallel. On the one hand, there has been a significant increase in the economic and soft ties with other European countries over the past 13 years but, on the other, there has been a significant shift in external presence from the extended neighbourhood towards Asia and the Pacific, North America and Latin America. The retrenchment of the share of the EU's global presence in the nearest and extended neighbourhoods (including candidate countries) strongly challenges the regional approach of the EUGS and also the African shift that the new 'Geopolitical Commission' has set as a priority.

It should be noted that variations in the shares of external projection are determined by a number of factors. On the one hand, the policies, objectives and features of both the agents projecting their presence (in the case of this study, the EU), but also those of the countries and regions at which the global presence is directed. For instance, investments are more likely to be directed at mature and dynamic economies, with a relatively high consumption capacity. Also, some specific variables of global presence are more likely to increase if previous levels of projection are recorded. In that respect, economic ties (such as the transatlantic bond) might be more likely to grow on the basis of previous exchanges than military variables.

The aim of this study is to provide a precise map of the EU's presence as an international player as an input for the debate on the Union's strategic priorities, in parallel with the design of a new strategy for foreign affairs and security. The EU's stated priorities can obviously remain in the nearest and extended neighbourhood. However, in that case, it is important to acknowledge that current policy instruments, the priorities of the various member states and the international activity of non-state actors show a different trend, towards a concentration in Western Europe and a global action beyond the neighbourhood. Also, the new Commission will necessarily need to take into account the Brexit process when re-assessing the Union's foreign policy. The UK will no longer be a relevant actor moulding the EU's external strategy. Furthermore, the strategy will need to take stock of the new situation regarding the UK and turn the former member state into a key partner outside the EU space. Moreover, the EU institutions and member states will necessarily need to reassess the geopolitical map and its own priorities after the current world health crisis.



## Annex: methodology

For the disaggregation of the EU's global presence we have maintained the structure and relation between indicators of the Global Presence Index detailed in the methodological annex of the Global Presence Report 2018 (Olivié & Gracia, 2018b) and in previous publications (Olivié & Gracia, 2013; Olivié & Molina, 2011), however, adding country-to-country bilateral data. To the extent possible, we have tried to use the same data sources as those used in the general calculation of the Index. In some cases, the bilateral breakdowns of the variables included in the original methodology of the Elcano Global Presence Index presented methodological challenges, obliging us to rely on alternative variables that allow an approximation of this bilateral information. In other cases, there was no availability of disaggregated data for the complete 2005-19 series, having to estimate results for these cases with the geographic distribution of the closest years. For all indicators, data were calculated considering the existing EU in each year, that is, the EU25 for 2005, the EU27 for 2010-13 and the EU28 since 2014.

The indicators of the economic dimension can be broken down relatively easily by destination, showing the EU's bilateral exports to each destination, and also by origin in each EU member, in the merchandise and service categories. In the case of investment, data are only available since 2009 so we have used the geographical distribution of the EU's stock of investment in that year to estimate the value for 2005. For the disaggregation of investments by member state, we use the Balance of Payments statistics and the BPM5 methodology for 2005 and BPM6 for the rest, which leads to problems in the annual comparison of results.

Data on military presence were disaggregated based on information from the IISS –The Military Balance Report–. We consider conflict, patrol and training missions involving EU member countries, both individually and in joint missions of either the EU or NATO, differentiating, on the one hand, the troops deployed and, on the other, the type of military equipment deployed. We have differentiated naval and air equipment and applied the average coefficient for each group of equipment included in the Elcano Global Presence methodology. We do not include drones or anti-aircraft batteries. Overseas missions have been assigned to the most appropriate region according to the objective. The EU and NATO missions in the Mediterranean Sea have been attributed to the North Africa region, the NATO mission in the Black Sea to Europe, the missions in the Indian Ocean or Arabian Sea to the Middle East and the missions in the Gulf of Guinea to Sub-Saharan Africa.

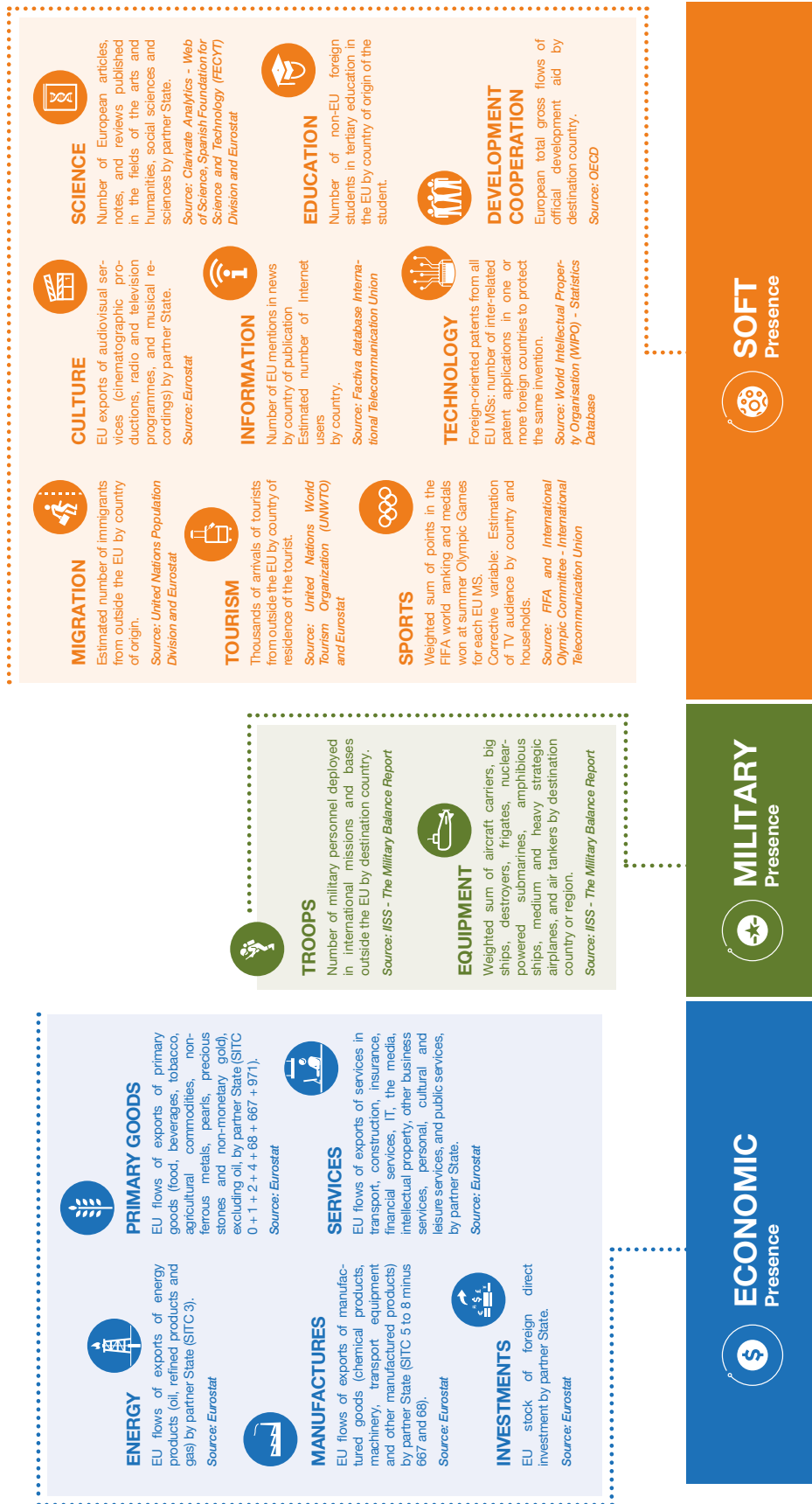
In the case of the soft dimension, some variables can be 'bilateralised' by relying on alternative sources (like migration, tourism, culture, technology or development aid) but others present conceptual or methodological challenges. In the case of sports –measured in the Index's original methodology on the basis of the FIFA points of national football teams and the number of Olympic medals–, for a breakdown by destination we have relied on television audience data. In the first case, we have taken World Cup audiences by country, based on data provided by FIFA. However, we have not been able to obtain similar information for the Olympic Games. Therefore, it has been necessary to rely on an alternative measure. We have acquired information on the number of households with televisions in each country to

yield an approximate measure of the potential audience for the Opening Ceremony of the Olympic Games.

The geographical breakdown of the information indicator also presented some challenges because of the way it is conceptualised in the Index's original methodology, with as measurement based on the number of mentions in the main news agencies (Associated Press, Reuters, AFP, DPA, ITAR-TASS, EFE, ANSA and Xinhua) retrieved from Factiva, and the Internet bandwidth in each country. For the press mentions, we have relied on the same database (Factiva), obtaining the number of wires referring to the EU and/or its member states in all principal agencies, considering all spoken languages in each country. With respect to the Internet indicator, given the impossibility of a geographical breakdown of the variable included in the original methodology, we have relied on the number of households with access to Internet in each country as an alternative variable, based on information provided by the International Telecommunication Union.

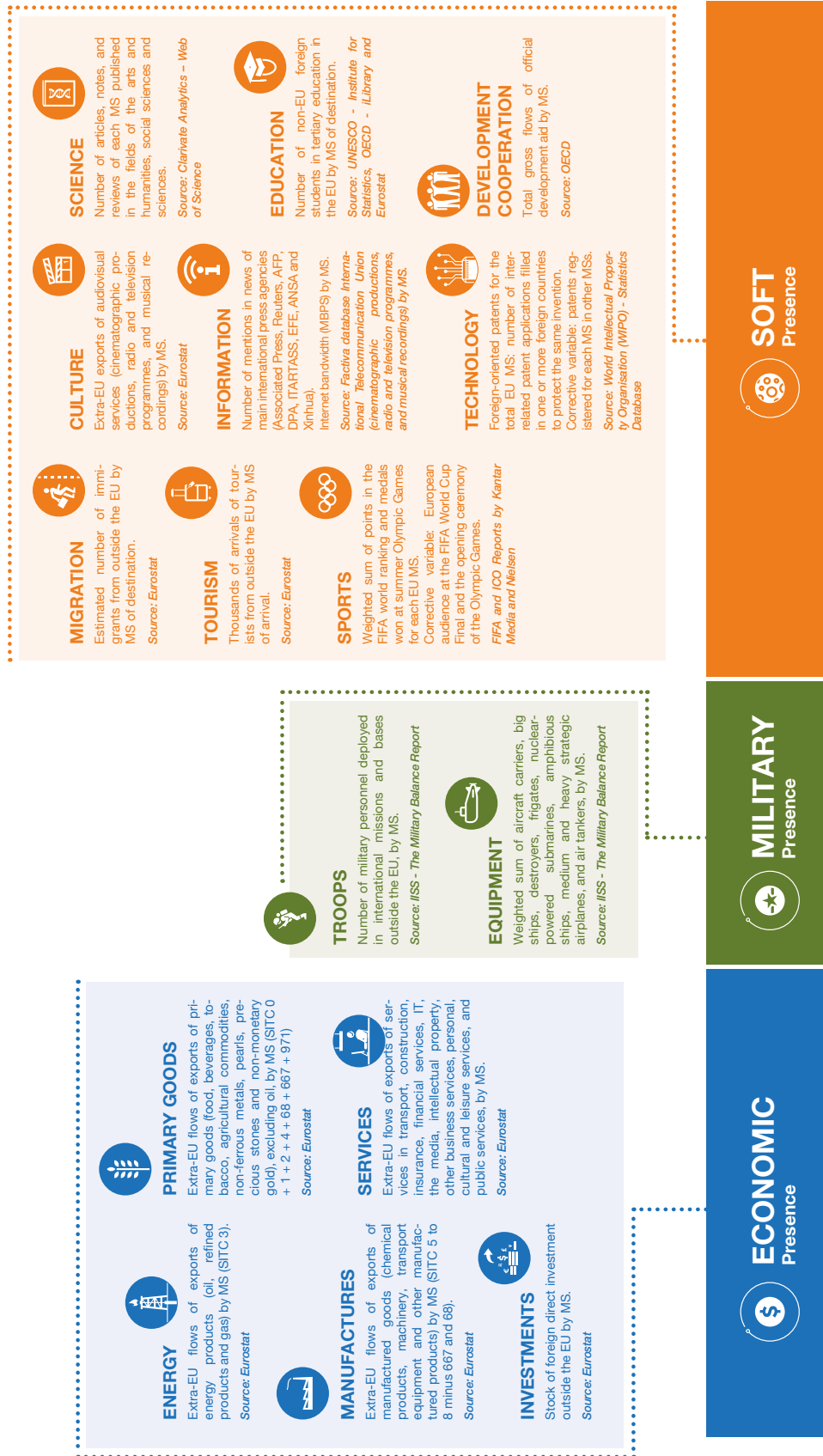
Finally, the science indicator is measured in the Index's original methodology on the basis of the number of scientific publications according to Clarivate Analytics' Web of Science indexing service. For a breakdown by geographical destination of the EU's scientific presence we have taken into consideration the articles co-published by a European author with authors of other non-EU countries of origin, based on information from the Web of Science Core Collection of Clarivate Analytics. We are grateful for the cooperation of the Spanish Foundation for Science and Technology (FECYT) in securing this information.

Figure 24. The EU's global presence: geographical breakdown



Source: the authors.

Figure 25. The EU's global presence by member states



Source: the authors.

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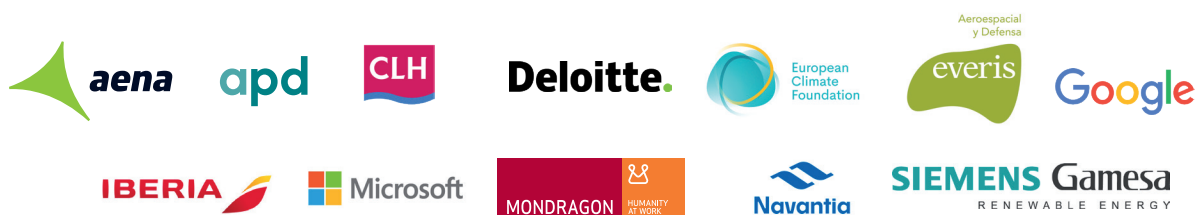
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