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Al-Qaeda's continued core strategy and disquieting leader-led trajectory

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Las relaciones empresariales de España con la China de la reforma: la evolución de un modelo

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Enrique Fanjul

Do Spaniards emigrate?

Only 2% of Spanish citizens living outside Spain are natives who have left the country due to the crisis, a total of around 40,000 people. This figure in no way supports the alarm stirred up by the media with regard to this phenomenon.

Carmen González Enríquez

Merkel's safe pair of hands now carry a heavy burden

Angela Merkel has emerged as the undisputed winner of the German elections, an achievement not to be underrated. Her alliance between the CDU (Christian Democratic Union) and the CSU (Bavaria's Social Christian Union) has gained the best election results since 1990.

Miguel Otero-Iglesias

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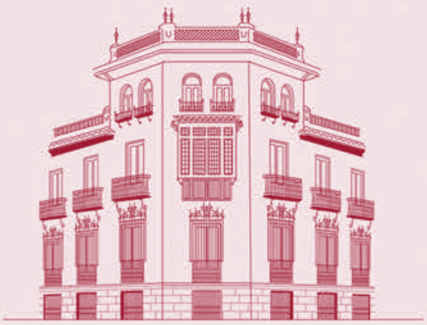

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Bruce Hoffman & Fernando Reinares

Theme

Al-Qaeda has withstood arguably the greatest international onslaught directed against a terrorist organisation in history, but it has survived for nearly a quarter of a century and continues to pursue a core strategy. The ongoing unrest in the Middle East could potentially resuscitate al-Qaeda's waning fortunes and it may assume unpredicted forms. Its final elimination may take years, if not decades, more to achieve.

Summary

Al-Qaeda's core strategy aims at distracting and exhausting adversaries, creating divisions between counter-terrorism allies, forging close ties and assisting local affiliates, planning major international or global attacks and monitoring our Western security and defence systems. Despite vast inroads made against Core al-Qaeda in recent years, its command structure has proved capable of adapting and adjusting to even the most consequential countermeasures directed against it. The repercussions of the Arab Spring, and ongoing unrest and protracted civil war in Syria have endowed the al-Qaeda brand and, by extension, the core organisation, with new relevance and status. Al-Qaeda's obituary has been written many times since the September 11 2001 attacks, only to be proved to be prematurely wishful thinking. In coming years, this organisation, turned into a global terrorism structure, may assume new and different forms that have not been anticipated.

Analysis

In the years following September 11 2001, it was no longer possible to equate the global terrorism threat solely with the challenge posed by Core al-Qaeda. As it evolved into a polymorphous phenomenon, the global terrorism threat diversified both geographically and organisationally. Acts of jihadist terrorism became very frequent in a variety of countries in South Asia and the Middle East such as Afghanistan, Pakistan and Iraq, a somewhat frequent reality in North and East-African countries such as Algeria and Somalia, and more sporadic in places as diverse as Kenya, Turkey, Saudi Arabia, Morocco, Spain and the UK. Organisations including the Islamic Emirate of Afghanistan (IEA), TTP and AQI have presented the most serious and sustained threats in the countries in which they operated, often in alliance with other terrorist or insurgent groups active in those same operational venues.

At the same time, though, it is clear that even as al-Qaeda evolved into a different organisational entity than existed on September 11, it continued to pursue a core strategy that embraced six key –core– elements.

Key elements of al-Qaeda's continued strategy

First, al-Qaeda sought to overwhelm, distract and exhaust its adversaries, especially at a time of growing global economic travail. Al-Qaeda asserts that its ultimate victory will not be achieved militarily, with the use of physical weapons and arms, but rather by undermining the economies of its opponents, exhausting their finances and wearing out their militaries. The notion of this strategy of attrition has been tightly woven into the al-Qaeda narrative. In a bin Laden videotape message, released just days before the US presidential election in 2004, he claimed credit for having spent the comparatively modest sum of half a million dollars to implement the September 11 attacks. By comparison, bin Laden argued, the US had had to spend trillions of dollars on domestic security arrangements and foreign military expeditions. He therefore claimed credit for America's economic travails and the fiscal developments that led to the fall of the US financial juggernaut. Such assertions were of course completely divorced from reality. However, propaganda does not have to be true to be believed, it just has to be effectively communicated so that it is believed. Al-Qaeda's message in this respect acquired greater resonance than ever in light of the US and the West's very real and continuing economic troubles.

Secondly, throughout this period al-Qaeda actively sought to create, foster and encourage fissures and divisions within the global alliance arrayed against it. This accounted for its focus on either encouraging or itself mounting attacks within the territory of close US allies in Western Europe, such as the UK, Spain, the Netherlands and Germany, for instance. This entailed the selective targeting of coalition partners in the American-led war on terrorism both in the actual theatres of these operations (eg, attacks directed specifically against perceived 'weaker' NATO partners committed to the International Security Assistance Force in Afghanistan such as the British, Canadian, Dutch, German and Italian contingents) and at home –through attacks on mass transit and other 'soft' targets in the national capitals and major cities of European countries allied with the US (eg, the 2004 Madrid and 2005 London bombings and the terrorist plots with links back to Pakistan foiled in 2007 in Germany and in 2008 in Spain).

Third, al-Qaeda continued to prosecute local campaigns of subversion and destabilisation where failed or failing states provided new opportunities for the movement to extend its reach and consolidate its presence and/or forge close relations with local jihadist organisations. Countries and regions such as Afghanistan, Pakistan, Somalia and other areas of East Africa, North Africa and, especially, Yemen fell within this category.

Fourth, al-Qaeda also actively continued to provide guidance, assistance and other help to local affiliates and associated terrorist movements. This support enhanced local and regional terrorist attack capabilities and strengthened the resilience of these groups, thus presenting more formidable challenges to national and local police, military forces and intelligence agencies. Al-Qaeda thus actively worked behind the scenes in these theatres as a 'force multiplier' of indigenous terrorist capacity both in terms of kinetic as well as essential non-kinetic operations –including information operations, propaganda and psychological warfare–.

Despite al-Qaeda's transformation it has continued to pursue a core strategy

Fifth, al-Qaeda continued to seek out citizens or legal permanent residents of enemy countries, especially converts to Islam, who possessed 'clean' passports that could deploy for attacks in Western countries without necessarily arousing suspicion. In other words, persons whose birth names remained in their passports rather than their adopted religious name, were intended to provide al-Qaeda with the ultimate fifth column –individuals whose appearance and names would not arouse the same scrutiny from immigration officials, border security officers, national police and security and intelligence services that persons from Muslim countries with distinctly Muslim names might–.

Finally, al-Qaeda remained as opportunistic as it was instrumental. In this respect, while its leaders planned and encouraged international terrorist attacks, they also continued to monitor al-Qaeda's enemies' defences, identifying gaps and vulnerabilities that could be transformed into opportunities and quickly exploited for attack.

Al-Qaeda's disquieting leader-led trajectory

Osama bin Laden, al-Qaeda's co-founder and leader, is dead. Key lieutenants have similarly been eliminated. The fourfold increase in targeted assassinations undertaken since 2009 by the Obama Administration has killed some three dozen key al-Qaeda leaders in Pakistan, as well as over 200 fighters, thus setting the core organisation –in the words of a 2011 US State Department analysis– 'on a path of decline that will be difficult to reverse'.

All attempts to write off al-Qaeda have proved to be premature

Although one cannot deny the vast inroads made against Core al-Qaeda in recent years because of the developments described above, the al-Qaeda brand and ideology have proved themselves as resilient as they are attractive to hardcore militants and Salafist extremists around the globe. For more than a decade, too, the Core al-Qaeda command structure has consistently shown itself capable of adapting and adjusting to even the most consequential countermeasures directed against it, having, despite all the odds, survived for nearly a quarter of a century. In this respect, weakened though it currently is, the Core al-Qaeda organisation has astonishingly withstood arguably the greatest international onslaught directed against a terrorist organisation in history. The al-Qaeda organisation has thus lasted longer than the overwhelming majority of contemporary terrorist movements, thus suggesting that its final elimination may take years, if not decades, more to achieve.

The repercussions of the Arab Spring and the ongoing unrest and protracted civil war in Syria at the time of writing, have also endowed the al-Qaeda brand and, by extension, the core organisation, with a new relevance and status that, depending on the future course of events in both that country and the surrounding region, could potentially resuscitate its waning fortunes. The fact that the remnants of Core al-Qaeda remain entrenched in South Asia coupled with the planned withdrawal of US forces and ISAF troops from Afghanistan, further suggests that it may well regain the breathing space and cross-border physical sanctuary needed to promote and perhaps even ensure its continued existence.

Throughout its history, the oxygen that al-Qaeda ineluctably depended upon has been its possession of, or access to, physical sanctuaries and havens. In the turbulent wake of the Arab Spring and the political upheavals and instability that followed, al-Qaeda has the potential to transform the toeholds that it has established over the past few years in the Levant and perhaps in the Sinai and in North and West Africa into footholds –thus complementing its established outposts in Pakistan, Afghanistan, Yemen and Somalia–.

Al-Qaeda's obituary has been written many times since the September 11 attacks, only to be proved to be premature. At the time, these views fit neatly with the prevailing consensus among government officials, academicians and pundits alike that al-Qaeda had ceased to exist as an organisational entity and had become nothing more than a hollow shell –an ideology without a command structure or the leadership to advance it– a leaderless entity of disparate individuals unconnected to any central authority. Bin Laden was also believed to be completely estranged from the movement he created, isolated from his fighters, sympathizers and supporters, and unable to exercise any meaningful role in the movement's operations and future trajectory. The threat, it was argued, had therefore become primarily a bottom-up and not a top down affair –to the extent that terrorist organisations themselves were regarded as anachronistic and the command and control functions that they had traditionally exercised were said to no longer matter–. Instead, it was argued, the real threat now came from self-radicalised, self-selected lone wolves or groups and not from actual, existing identifiable terrorist organisations.

Then, just to focus on the US case, the 2009 plot to stage simultaneous suicide attacks on the New York City subway system, to coincide with the eighth anniversary of the September 11 2001 attacks, came to light. The ringleader, an Afghan-born Green Card holder who lived in Queens named Najibullah Zazi, testified that both he and two fellow conspirators had been trained at an al-Qaeda camp in Pakistan. Three senior Core al-Qaeda commanders –the late Rashid Rauf and Saleh al Somali, who were respectively killed in US drone strikes in 2008 and 2009, together with Adnan al Shukrijumah– had overseen and directed the plot, which was also linked to two other ambitious sets of attacks planned for April 2009 in Manchester, England, and July 2010 in Scandinavia. Hence, the profoundly simplistic notions both that al-Qaeda had ceased to exist as an operational entity and the myth that the only terrorist threat that any longer mattered was that posed by self-radicalised, self-selected individuals were effectively shattered.

Osama bin Laden left behind a resilient movement

The Core al-Qaeda has stubbornly survived despite predictions or the conventional wisdom to the contrary and has persisted not only in providing ideological justification and guidance to the broader jihadist movement but also in the actual direction and implementation of terrorist operations. Indeed, given that virtually every major terrorist attack or plot, for instance, against either the US or the UK, during the period between September 11 2001 and bin Laden's killing was known either to have emanated from Core al-Qaeda or from close allies and associates often acting on its behalf –at a time when it was claimed that Core al-Qaeda had ceased to exist– calls into question many of the assumptions and arguments that gained currency throughout that long decade.

In this respect, while bin Laden's death inflicted a crushing blow on al-Qaeda, it is still unclear that it has been a lethal one. He left behind a resilient movement with an ideology that remains compelling and a brand that is still attractive even if the organisation behind both has seriously weakened. Despite its systematic attrition as a result of the US drone campaign, for instance, al-Qaeda has nonetheless been expanding and consolidating its presence in new and far-flung locales, including North and West Africa and the Levant and Iraq in particular. Al-Qaeda has thus been able to demonstrate a remarkable ability to continue to replenish its ranks with new recruits and adherents, project a message that still finds an audience in disparate parts of the globe, however modest that audience may perhaps be, and articulate a strategy that continues to inform both the movement's and the core's operations and activities and that today is championed by bin Laden's successor, Al Zawahiri.

Since 2002 al-Qaeda has followed a path that has enabled it to survive by becoming a de-centralised global structure within a networked, transnational movement rather than the single monolithic entity that it once was. In the midst of the group's expulsion from, and defeat in, Afghanistan, Al Zawahiri charted a way forward –at a moment, it is worth recalling, and when everyone else believed it was on the brink of annihilation–. His treatise, published in the London-based Arabic language newspaper *al Sharq al Aswat* in December 2001, and titled *Knights Under the Prophet's Banner*, explained how 'small groups could frighten the Americans' and their allies. It equally presciently described how '[t]he jihad movement must patiently build its structure until it is well established. It must pool enough resources and supporters and devise enough plans to fight the battle at the time and arena that it chooses'. At the heart of this approach remained al-Qaeda's enduring strategy of conceptualising its struggle in terms of 'far' and 'near' enemies. The US, as well as other Western liberal democracies, of course, were the 'far enemy', whose defeat was a prerequisite to the elimination of the 'near enemy' –the corrupt, reprobate and authoritarian anti-Islamic regimes in the Middle East, Central Asia, South Asia and South-East Asia that could not otherwise remain in power without American and other Western support–. In light of the Arab Spring, that strategy has now assumed almost a hybrid character, whereby the movement by necessity has focused almost entirely on the 'near enemy', local struggles, while remaining characteristically poised to take advantage of any opportunity to attack the 'far enemy' that presents itself.

Conclusions

Today the conventional wisdom argues that, much like bin Laden's killing, the Arab Spring has sounded al-Qaeda's death knell. However, while the mostly non-violent, mass protests of the Arab Spring were successful in overturning hated despots and thus appeared to discredit al-Qaeda's longstanding message that only violence and jihad could achieve the same ends, in the years since these dramatic developments commenced, evidence has repeatedly come to light of al-Qaeda's ability to take advantage of the instability and upheaval across these two regions to re-assert its relevance and thereby attempt to revive its waning fortunes.

The final chapter of al-Qaeda's long and bloody history has yet to be written. Since the September 11 attacks to the killing of bin Laden in 2011, it has proved to be a highly resilient organisation capable of adaptation and adjustment that, despite grievous leadership losses and diminished resources, was still able to harness the energy of its constituent parts and marshal the powerful narrative and ideology that sustains the collective movement, to carry on the struggle proclaimed by bin Laden in 1988. These characteristics ensure both that the final battle against al-Qaeda has not yet been fought and in coming years the movement may assume new and different forms that could not have previously been anticipated or predicted and that therefore will require an entirely different approach and means to finally eliminate it.

Al-Qaeda has proved to be remarkably resilient and adaptable

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Las relaciones empresariales de España con la China de la reforma: la evolución de un modelo

En 2013 se cumplen 40 años de relaciones diplomáticas entre España y la República Popular China. En el presente ARI se estudia cómo ha evolucionado y se ha transformado el modelo de relaciones empresariales España-China en este período.

Enrique Fanjul

Tema

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Resumen

La presencia de la empresa española en China en las últimas décadas ha pasado por dos grandes etapas. En la primera, que se inicia a principios de los años 80, el rasgo más determinante fue el liderazgo de la Administración. La Administración española "arrastró" a las empresas a un mercado atractivo pero desconocido y difícil como era el chino, estableciendo mecanismos de apoyo que fueron decisivos. No existe una frontera bien definida con la siguiente etapa. Pero es a lo largo de la década de los años 2000 cuando se consolida un nuevo modelo, basado en una presencia más sofisticada y variada del sector empresarial privado, reflejo tanto de los cambios y el crecimiento de la economía china como de los avances en el proceso de internacionalización de las empresas españolas. La Administración, aunque ha seguido desempeñando un papel, ha perdido el protagonismo que tuvo anteriormente, un protagonismo que ha pasado a otros agentes económicos, como el sector privado chino, un abanico crecientemente variado de empresas españolas, las empresas chinas que invierten en el exterior, las multinacionales españolas, la emergencia de nuevos sectores de población chinos de alta capacidad de consumo, etc.

Resumen

La justificación de las políticas de internacionalización se halla en la existencia de una serie de fallos de mercado que dificultan la actividad internacional de las empresas.[1] En el caso de la empresa española y la China de los años 80 del siglo pasado, que se había embarcado unos años antes en la nueva era de la reforma, existían unas barreras de entrada formidables. Por un lado, existía en China un gran desconocimiento acerca de la capacidad de las empresas españolas, así como una competencia muy fuerte de otros países industrializados. En el lado español, existía también desconocimiento sobre China: era un mercado lejano, geográfica y culturalmente, y las empresas españolas carecían de profesionales con los conocimientos adecuados para abordarlo.

La Administración española tomó, sin embargo, la decisión de que en China se estaban abriendo, con la reforma, grandes posibilidades económicas y comerciales y que la empresa española debía estar presente en este mercado. Se decidió utilizar con decisión las políticas de internacionalización para vencer las barreras de entrada a las que se ha hecho referencia en el párrafo anterior.

La política de la Administración se articuló en torno a cuatro ejes: apoyo político-institucional, apoyo financiero, promoción comercial y apoyo directo (organizativo y logístico) a las actividades de las empresas.

La visita a China del presidente del Gobierno Felipe González en 1985 marcó el comienzo de una política decidida de apoyo político-institucional a las empresas españolas. El proyecto que "abrió" el mercado chino a la empresa española fue la planta de materias primas para detergentes de Fushun (provincia de Liaoning), cuyo contrato firmó en 1988 Técnicas Reunidas. Era un proyecto importante por su tamaño, con un componente tecnológico destacado y que avalaba la capacidad de España, y que abrió el camino a la firma de una importante serie de contratos por parte de empresas españolas para realizar proyectos industriales. La eficaz coordinación entre la Administración y las empresas españolas fue un factor clave en los éxitos obtenidos en esta etapa.

En paralelo al apoyo institucional, el liderazgo de la Administración española se tradujo en un fuerte apoyo financiero mediante los créditos FAD (Fondo de Ayuda al Desarrollo). Estos fueron imprescindibles para situarse en línea de competitividad. La nueva China de la reforma era un mercado muy atractivo desde el punto de vista comercial, lo cual se traducía, entre otras cosas, en la disponibilidad de una oferta financiera ventajosa, con un elevado volumen de créditos concesionales, por parte de los principales países occidentales. Sin los créditos FAD, las empresas chinas, que conocían muy poco acerca de la capacidad industrial de España, no hubieran tomado en consideración a las empresas españolas como potenciales suministradores de interés. Los créditos FAD cumplieron en China con gran eficacia sus objetivos: apoyar la internacionalización de la empresa española, por un lado, y favorecer el desarrollo económico de China, por otro.

[1] Sobre las políticas de internacionalización puede verse Enrique Fanjul (2012), "Políticas de internacionalización de la economía y la empresa: un instrumento para promover el crecimiento y el empleo", ARI nº 35/2012, Real Instituto Elcano, Madrid, 8/V/2012.

La otra gran vertiente de lo que hemos llamado el “liderazgo de la Administración” era el apoyo político-institucional. Por las características institucionales de China, por tratarse de una economía altamente centralizada, con un peso dominante en la industria del sector estatal, el componente oficial en las relaciones económicas ha sido muy relevante.

Las relaciones institucionales se apoyaron en un constante flujo de visitas oficiales entre uno y otro país, que contribuyeron a crear ese marco de apoyo político-institucional al que nos estamos refiriendo. Este flujo de visitas institucionales se mantendría a lo largo de los años, aunque con constancia variable, sobre todo por parte española.

Las otras dos líneas de actuación de la Administración fueron líneas tradicionales de actuación, que lleva a cabo en todos los mercados que tienen un interés económico. Por un lado, la promoción comercial, mediante la organización de ferias, misiones comerciales, etc. Y, por otro, el apoyo logístico a las actividades de las empresas, un apoyo que en el caso de China tuvo una gran importancia, y que va desde asistir a los empresarios españoles en sus visitas hasta asesorarles en sus negociaciones y en su actuación en el mercado chino. El apoyo se ha prestado fundamentalmente desde las Oficinas Comerciales de España: en un principio, Pekín, a la que se fueron añadiendo posteriormente Hong Kong, Shanghai y Cantón.

Desde la etapa inicial de los años 80 hasta nuestros días un tema clave para la actuación empresarial ha sido estudiar bien las condiciones del mercado. Esto, que se aplica a todos los mercados, ha presentado mayores dificultades en China, por el alejamiento geográfico, las barreras culturales, el tamaño del país y los cambios que se producían con frecuencia en la política económica. Es frecuente escuchar comentarios acerca de que China es un mercado muy difícil y muy especial. Pero el elemento determinante, antes y ahora, ha sido prepararse adecuadamente y estudiar correctamente el mercado.

En esta etapa, una de las claves en la actuación de España en China fue la política mantenida por nuestro país tras los sucesos de Tiananmen de 1989, una política moderada que se opuso a sanciones duras que tuvieran como consecuencia aislar a China. Esta visión partía de la idea de que la mejor forma de favorecer la democracia y los derechos humanos en China no era a través de sanciones económicas, sino a través de su integración, en todos los aspectos, en la comunidad internacional. A raíz de la crisis de Tiananmen, España mantuvo, y defendió en el seno de la UE, una política moderada, que procuraba evitar el aislamiento de China. Gracias a ello España mejoró su imagen en China. Uno de los gestos más significativos, y simbólicos, de la actitud española fue la visita que realizó a China, a fines de 1990, el ministro español de Asuntos Exteriores, Francisco Fernández Ordóñez: fue la primera visita que un ministro de Asuntos Exteriores de la UE efectuaba a China tras los sucesos de Tiananmen.

Hacia un nuevo modelo

En los años 80 y 90 del siglo pasado, el modelo de presencia empresarial español, como señalamos anteriormente, se basó en el liderazgo de la Administración, la financiación concesional, el protagonismo de proyectos grandes y medianos, el esfuerzo por promover la imagen y el conocimiento de España, y escasas inversiones por parte de España.

En paralelo a los anteriores desarrollos se registraba un flujo comercial, relativamente modesto, de productos de diverso tipo, entre los que destacaban, en la exportación española, los productos siderúrgicos, químicos y farmacéuticos, con una creciente importancia de la maquinaria y la tecnología asociadas al desarrollo de proyectos. Por el lado de la importación, ya desde los años 80 se inicia la senda ascendente de las importaciones de productos chinos, mayoritariamente de lo que podríamos denominar industria ligera, como textiles, juguetes, zapatos, electrónica y regalos.

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El ascenso de la importación de productos chinos ha sido constante y espectacular. En 2012 las importaciones españolas de productos chinos han llegado a los 17.631 millones de euros, mientras que las exportaciones fueron de 3.765 millones. El déficit en el comercio bilateral has ido por tanto de 13.866 millones: una cifra que representaba un 45% del total del déficit comercial español. Esto significa que si bien China representa un porcentaje relativamente pequeño del comercio exterior de España, tiene en cambio un peso enorme en el déficit, siendo responsable de cerca de la mitad del total del déficit comercial español.

El modelo de relación empresarial que hemos esbozado más arriba empieza a modificarse aproximadamente a partir de la primera década de este siglo. Los cambios que se van a registrar van a ser muy profundos, aunque paulatinos, y son consecuencia de los cambios experimentados tanto en la economía china como en el proceso de internacionalización de la empresa española.

En la economía china, el trasfondo de los cambios se encuentra en el fuerte y constante crecimiento económico. Hay cuatro aspectos clave en este proceso de transformación y expansión de la economía china:

(1) El crecimiento económico ha dado a lugar a un aumento del nivel de vida y la emergencia de una potente clase media/alta con elevados niveles de consumo. China se ha convertido así en un importante mercado de bienes de lujo. En 2012 China ya se había convertido en el segundo mercado del mundo para bienes de lujo, detrás de Japón. Las estimaciones son que en pocos años se convertirá en el primer mercado.

(2) El sector privado ha venido creciendo con fuerza desde hace años, y está adquiriendo un creciente papel en la economía. Este hecho, sin embargo, debe ser contemplado con matizaciones. Las fronteras entre el sector privado y el gobierno no son en China tan nítidas como en otros países, particularmente en las grandes empresas. Las grandes empresas privadas chinas tienen un grado de dependencia "real" relativamente alto respecto al gobierno. En general, en China las autoridades ejercen una influencia sobre el funcionamiento económico que trasciende las distinciones formales entre empresa pública y privada.

(3) La creciente internacionalización de las empresas chinas. En la última década las inversiones chinas en el exterior han crecido con gran fuerza. Ha surgido un número cada vez mayor de empresas multinacionales chinas que operan con una perspectiva global. Si en un principio las inversiones chinas en el exterior se orientaban hacia el aseguramiento de suministro de materias primas, los sectores y la orientación de las empresas chinas se están diversificando. En el Fortune 500 de 2012 aparecen 78 empresas chinas, tres de ellas entre las 10 primeras.

(4) El aumento de las reservas de divisas chinas y la transformación de China en fuente de financiación al exterior. Gracias a sus saneadas cuentas exteriores, y en particular al elevado superávit en su balanza comercial, China había acumulado en 2012 alrededor de 3 billones de dólares en reservas de divisas. El país que antes era un país pobre, al que había que ofrecer créditos concesionales para poder optar a la adjudicación de proyectos, se ha convertido en una fuente de financiación atractiva. Las empresas chinas invierten y compran participaciones en empresas en numerosos países, tanto ricos como en vías de desarrollo. China se ha convertido en un destacado prestamista.

Por parte de la economía española, el principal condicionante va a ser su proceso de internacionalización, que va a dar un salto cualitativo con la emergencia de las grandes multinacionales españolas, una serie de empresas, sobre todo de servicios, que han salido a los mercados internacionales y han adquirido un peso destacado en diversos sectores y países.

Otro cambio en el interior de la economía española, que afecta directamente a las relaciones con China, es el nuevo papel que ha cobrado la comunidad china. Esta, inicialmente concentrada en la actividad de restaurantes, ha diversificado y sofisticado su actividad profesional, apoyada en parte por la entrada en acción de una segunda generación, que ha crecido y estudiado en España, que conoce mucho mejor que sus padres las costumbres y la lengua españolas. La comunidad china ha diversificado su actividad hacia el comercio minorista y también, con el paso del tiempo, hacia el comercio mayorista. Ha surgido un sector de profesionales chinos en España, de alto nivel profesional, cuya expresión más destacada es el China Club, que están desarrollando un papel de creciente importancia en las relaciones empresariales entre China y España.

Como consecuencia de estos cambios, se ha pasado paulatinamente a un modelo de relaciones empresariales más diversificado y sofisticado, en el que destacaríamos las siguientes características:

(1) La entrada en China, como inversores, de varias multinacionales españolas, a partir de la década del año 2000. En los años 80 y 90 del siglo pasado las empresas españolas de gran tamaño que actuaban en China lo hacían sobre todo en el lado de la exportación, realizando grandes proyectos. Las empresas que invertían en China eran fundamentalmente pequeñas y medianas.

El año 2005 es un hito decisivo con la entrada de Telefónica en el capital de China Netcom, y en 2006 BBVA entra en el capital del China Citic Bank, así como en una empresa financiera del grupo CITIC en Hong Kong. Son las dos primeras grandes multinacionales españolas que entran en el mercado chino, aunque con participaciones relativamente pequeñas en empresas locales, no con su propia marca como han hecho en otros mercados.

(2) Desde el punto de vista sectorial, ha habido una notable diversificación. El aumento del nivel de vida en China ha repercutido de forma directa en la presencia empresarial española. Frente al predominio de tecnología, maquinaria y productos industriales en los años ochenta y noventa, han adquirido una creciente presencia, tanto en inversión como en exportación, los bienes de consumo, dirigidos a las nuevas capas de consumidores chinos con alta capacidad adquisitiva. Desde las cadenas de ropa y calzado hasta fabricantes de alimentos y bebida de alta gama, pasando por fabricantes de joyas, empresas españolas de muy diverso tipo se han implantado en el mercado chino.

(3) Surge y se desarrolla el turismo chino hacia España. La última década ha contemplado un *boom* del turismo emisor chino, que probablemente se convertirá en el primero del mundo en tamaño en unos pocos años. España también ha recibido un creciente número de turistas chinos, aunque quizá en menor medida de lo que hubiera sido posible y proporcionado en relación con la importancia que España tiene en el turismo mundial.

(4) La internacionalización de las empresas chinas trae también a España a una serie de multinacionales del país asiático, como Lenovo, Haier y, de forma destacada, Huawei, que se convierte en un importante suministrador de equipos de comunicaciones.

(5) En lo que constituye uno de los cambios que más pone de relieve la transformación del modelo de relaciones empresariales, China empieza a convertirse en una fuente de financiación para la economía y las empresas españolas. El ejemplo más destacado de este nuevo papel ha sido la alianza de Repsol con la petrolera china Sinopec para explotar conjuntamente campos de petróleo en Brasil. El presidente de Repsol valoró justamente en su momento la entrada de la empresa china Sinopec en la filial brasileña de la empresa española, con una inversión de 7.100 millones de dólares, como "un antes y un después" en las relaciones económicas de España con China.

(6) La comunidad china establecida en España, que en los años 80 y 90 había tenido un papel relativamente pequeño en la actividad de las empresas españolas en China, ha adquirido un papel mucho más relevante. Estos ciudadanos de origen chino, como ha ocurrido antes en otros países, se han convertido en asesores e intermediarios y actúan en diversos flujos económicos: por supuesto en la importación de productos chinos en España, pero también como elementos de apoyo a las operaciones de empresas españolas en China, utilizando sus contactos y conocimientos en sus lugares de origen en China, en cuya cultura, como es bien sabido, las relaciones personales desempeñan un papel clave.

Balance y futuro

Las tendencias que hemos mencionado en los párrafos anteriores se mantendrán y reforzarán previsiblemente en el futuro. Además, en los comienzos de la presente década se han empezado a perfilar otras tendencias que van a influir en la relación empresarial de España con China. Mencionamos a continuación algunas de las más significativas.

Con la crisis económica y el aumento del desempleo en España se ha puesto en marcha un proceso de emigración al extranjero de profesionales españoles. Este proceso ha afectado también a China, una economía que ofrece oportunidades de empleo por su gran tamaño y sus fuertes tasas de crecimiento. La afluencia de profesionales españoles a China podrá favorecer en el futuro las relaciones económicas entre los dos países. En primer lugar, la experiencia de trabajo en China contribuirá a mejorar la formación y el conocimiento de estos profesionales del mercado chino. Asentados en China pero con conocimientos y contactos en España, estos profesionales están inmejorablemente situados

Medidas como la concesión de residencia para los ciudadanos extranjeros que adquieran propiedades en España podrían dar un gran impulso a las inversiones chinas en el sector inmobiliario español para ayudar a empresas chinas que quieran desarrollar su actividad en España, o para ayudar a empresas españolas que quieran desarrollar negocios en China. En resumen, podrán ser un instrumento para reforzar los vínculos económicos entre los dos países.

Por otra parte, en los últimos años la economía china ha empezado a perder atractivo como destino para la deslocalización de actividades industriales. Varios factores se encuentran detrás de este hecho. Por un lado, con el desarrollo económico los costes de producción en China han aumentado, en particular los costes laborales. En muchos países industrializados la crisis económica ha producido una contención o reducción de costes. Esto no significa en absoluto que se vayan a contraer las inversiones españolas en China. En la China de la reforma ha habido dos grandes motivaciones para las inversiones de las empresas extranjeras: para aprovechar sus bajos de costes de producción, o para vender en el mercado doméstico. Los cambios en curso en la economía china –el aumento del nivel de vida de la población, el favorecimiento del consumo como motor económico y el aumento de los costes de producción, en especial los laborales– harán que la primera motivación pierda importancia y que se refuerce la segunda.

Cabe anticipar igualmente que crecerá el número de empresas chinas que invertirán en España. Hay un sector en el que se abren amplias oportunidades para la inversión china en España: el inmobiliario, debido a la caída de precios inmobiliarios registrada en España y la creciente capacidad de compra de los ciudadanos chinos. Medidas como la concesión de residencia para los ciudadanos extranjeros que adquieran propiedades en España podrían dar un gran impulso a las inversiones chinas en el sector inmobiliario español.

Conclusión

Creo que la experiencia de la empresa española en China es una experiencia de éxito razonable.

Un buen indicador a este respecto es el número de empresas españolas implantadas en China, de una u otra forma. En China hay más empresas españolas implantadas que en todo el resto del continente asiático, y me atrevería a decir que con una gran diferencia.

En China se ha recorrido un camino, que estuvo marcado en una primera etapa por un liderazgo de la Administración que sirvió para colocar a China en el mapa de un número creciente de empresas españolas, y que fue decisiva para que los agentes chinos consideraran la oferta española y se pudieran conseguir contratos de proyectos y tecnología, así como para favorecer un aumento del conocimiento mutuo.

Con el paso del tiempo, el crecimiento de la economía china y la mayor internacionalización de la empresa española han ido configurando un panorama de relaciones caracterizado por una mayor diversidad sectorial, un creciente papel del sector privado chino, la entrada en China de algunas de la grandes multinacionales españolas, el despegue de las inversiones chinas en España, el papel cada vez más relevante de los profesionales españoles instalados en China y de los profesionales de origen chino en España, y ese cambio tan radical que ha supuesto la transformación de China, de ser un receptor de financiación concesional española a convertirse en una fuente de financiación para empresas españolas. Esas tendencias apuntan el camino hacia el futuro.

Enrique Fanjul

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Do Spaniards emigrate?

Contrary to what numerous media reports seem to suggest, current Spanish emigration is very slight.

Carmen González Enríquez

Theme

Contrary to what numerous media reports seem to suggest, current Spanish emigration is very slight.

Summary

Only 2% of Spanish citizens living outside Spain are natives who have left the country due to the crisis, a total of around 40,000 people. This figure in no way supports the alarm stirred up by the media with regard to this phenomenon.

Analysis

Over the past couple of years the alarm has been raised in Spain and abroad about the rise in Spanish emigration. Furthermore, those voices consider this emigration to be, in itself, yet another of the evils that are afflicting Spanish society; a waste of the resources invested in education and a threat to the future of Spain's population.

The alarm, however, is unjustified in view of the figures. At present there are 1,900,000 Spaniards living abroad –data from January 2013–, but very few of these have emigrated recently. In the group there are four distinct types of people:

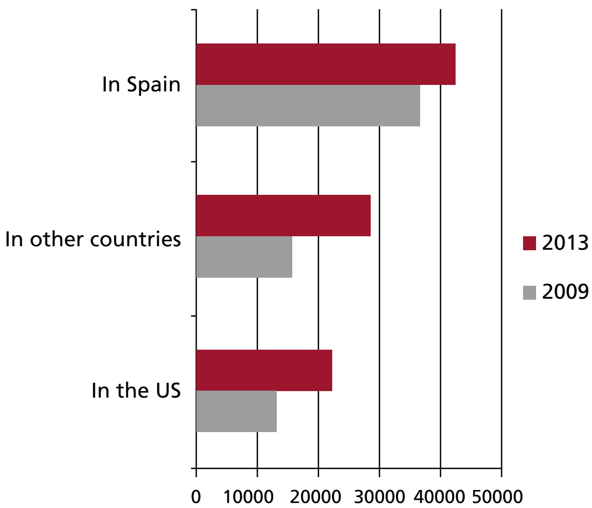
(1) Spanish emigrants who in the 1960s went to central and northern European countries, many of them settling there permanently. Around 2 million people emigrated to Europe between 1959 and 1973. Even though many returned after the oil crisis and, above all, due to Spain's economic growth brought on by its entry to the EU, a large number of Spaniards settled permanently in Germany, Switzerland, France, Belgium and other countries. At the dawn of the new century, in 2002, right in the middle of Spain's economic boom, the electoral roll of residents abroad came to 488,000 Spaniards who were over the age of 18 and lived in another European country, most of them in France, Germany and Switzerland. That same census now, in 2013, shows 541,000 Spaniards who are over 18 and live in another European country, which implies a small increase of 53,000, or slightly over 10%. An alternative source, the RSRA (Register of Spaniards Resident Abroad, PERE in Spanish), which was started in 2009, shows the evolution of emigration since the crisis began to have an effect on the international mobility of Spaniards: according to its figures, at the beginning of 2013, in Europe there were 20,204 more Spaniards born in Spain than in 2009 (349,653 versus 329,449).

(2) The Spanish emigrants, along with their children and grandchildren, who left Spain throughout the 19th and 20th centuries –particularly during the Civil War and the post-war period– to move to a number of Latin American countries, mainly Argentina and Venezuela. In 2002 the electoral roll showed 483,000 Spaniards over the age of 18 living in Latin America. A great number of the earlier emigrants, however, had lost their Spanish nationality and the so-called Historical Memory Act, approved in 2007, offered them the chance to reclaim it. In application of this Act, 503,000 requests for Spanish nationality have been received, 90% of them from Latin America, and close to 300,000 have been favourably settled, thereby increasing the number of Spanish nationals in Latin America whose presence there has nothing to do with the economic crisis in Spain.

(3) Spanish emigrants in any other part of the world, especially the US, Canada and Australia. In 2002 they totalled 79,000 according to the electoral roll, and that figure has now doubled to 167,000 according to the PERE of January 2013. However, only a part of this growth is due to Spaniards born in Spain, the bulk of them being those not born in Spain or in their country of residence, that is to say, they are not the children of previous emigrants. The case of the US, the main destination of Spanish migration after Europe and Latin America, clearly shows that the number of Spaniards that has increased the most is those who were not born in Spain or the US, but in other countries. They are, therefore, people who have acquired Spanish nationality, mostly Latin Americans who emigrated to Spain and then to the US. On the whole, fewer than half of the Spanish citizens living in the US in 2013 had been born in Spain.

(4) Latin Americans who migrated to Spain, obtained Spanish nationality and, as a result of the economic crisis, left the country and returned to their countries of origin or moved to another. Statistics record them as being Spaniards living abroad but, in most cases, they cannot be considered emigrants since they live in their country of origin.

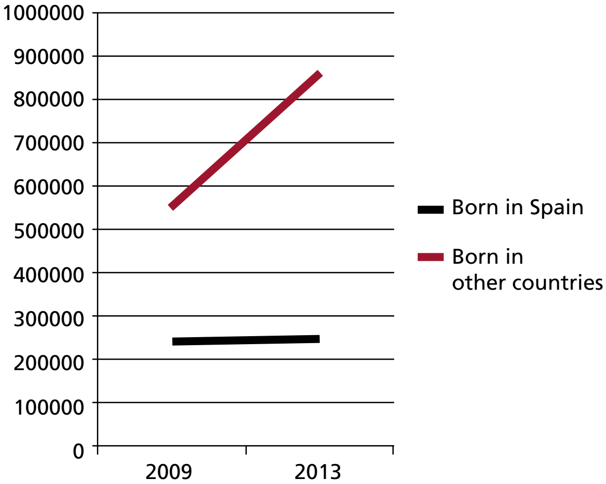
Figure 1.
Spanish citizens resident in the US, by country of birth



Source: Register of Spaniards Resident Abroad (PERE).

In the figure for Spaniards currently residing in Latin America, 1,107,000 according to the PERE in January 2013, earlier Spanish emigrants are included, as well as two further types of false emigrants: those who have never lived in Spain but are descended from earlier Spanish emigrants, and those who were born in Latin America, emigrated to Spain, acquired Spanish nationality and then returned to their country of origin. These people cannot be considered emigrants either since they live in the country in which they were born. Both groups are indistinguishable in statistical terms. Less than a quarter of the Spanish citizens living in Latin America were born in Spain. They come to a total of 245,000, amongst whom there are a large number of earlier emigrants. Comparing these data to previous results, that allow residents living abroad to be differentiated by country of birth –those of 2009– it can be seen that the number of Spaniards born in Spain and living in Latin America has hardly varied over the past five years. In 2009 they were 238,000, which means the number has grown by 3% (7,000 people).

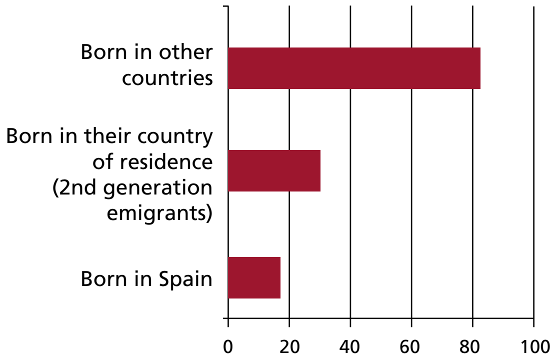
Figure 2. Spanish citizens resident in Latin America, by country of birth



Source: Register of Spaniards Resident Abroad (PERE).

The presence of emigrants from Latin America and other countries of origin (mainly Moroccans) who obtained Spanish nationality and later moved to other countries is also noticeable in Europe, where they constitute the group that has grown the most due to the crisis: 83%.

Figure 3.
Percentage growth in the number of Spaniards in other European countries, 2009-13



Source: Register of Spaniards Resident Abroad (PERE).

How many Spaniards have emigrated due to the crisis?

From the figures above it can be deduced that recent Spanish emigrants, those who left the country in the wake of the 2008 economic crisis and because of reduced job opportunities, form a very small group in comparison with the total number of individuals with Spanish nationality who live abroad. According to the PERE, the number of Spaniards born in Spain and living abroad only rose by 6% –40,000 people– between January 2009 and January 2013, this is to say, the years of crisis. These 40,000 people represent less than 0.1% of Spain's total population.

But it could be the case that the real figure of emigrants is actually larger than that recorded in Spanish statistics because many, especially the more recent cases, do not register in the corresponding consulate and are, therefore, statistically invisible as emigrants. To evaluate the possible under-representation of Spaniards in the country's emigration statistics it is useful to compare the Spanish data with the statistical offices of some of the main destinations countries: Germany, the UK, France and Switzerland. These four countries make up 76% of the total Spanish emigration to other European countries. According to this comparison, the PERE's Spanish figures are at times substantially higher than those recorded in the country of destination (in the case of France and Switzerland) and in others they are very close, if not practically identical (the UK and Germany).

[2] Data from Office for National Statistics (United Kingdom) y de la Statistisches Bundesamt (Germany) and recorded by OCDE in the International Migration Outlook de 2013.

Figure 4. Comparison between the number of emigrants according to the PERE and the statistical office of the country of destination

	According to the PERE	According to the statistical office of the country of destination
Germany	111,731 (1/I/2012)	110,193 (31/XII/2011)
UK	64,317 (January 2011)	71,000 (2011)
France	169,473 (over 14 years old, January 2011)	100,588 (over 16 years old, Labour Force Survey 2011)
Switzerland	99,539 (1/I/2013)	69,400 (31/XII/2012)

Sources: INE (Spain); Office for National Statistics (UK); Statistisches Bundesamt (Germany); Institute national de la statistique et des études économiques (France); and Office Federal de la Statistique Suisse (Switzerland).

The comparison shows that Spanish statistical sources do not underestimate the number of Spaniards living abroad. Nevertheless, many Spaniards may be, for a short time, trying their luck in other countries and not actually settling there, in other words, not living there long enough to register in their institutions. What could also be happening is that the 'stock' figures could be hiding heavy movement, that is to say, that many Spanish emigrants could have left the destination country and been replaced by others. This is what the data regarding Germany and the UK seem to suggest: the inflow of Spaniards seems to rise but the number of residents is not proportionally altered, which implies the outflow of many others. The outflow of foreigners from Germany accounted for two thirds of foreign arrivals in 2011, and half in the case of the UK.[2] In fact, Spanish emigrants in some European countries are fewer today than some years ago. In Switzerland, for instance, the number of Spaniards fell from 77,800 in 2003 to 69,400 in December 2012 (*Office Federal de la Statistique Suisse*). In France, the population *recensement* of 2008 recorded 257,315 Spaniards, as opposed to 248,315 in 2010. Most of them are inactive population –retirees– (*Institute national de la statistique et des études économiques*, France).

Very few of the 1,900,000 Spanish citizens living abroad are recent emigrants

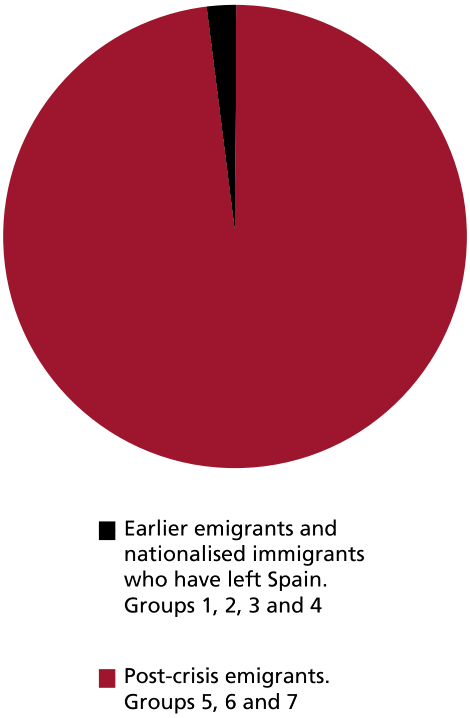
In short, Spanish citizens living abroad can be classified as follows based on the PERE's figures:

(1) Earlier Spanish emigrants, and their descendants, who moved to Latin America throughout the 20th century, and Latin Americans who immigrated to Spain, acquired Spanish nationality and later on returned to their country of origin: 1,075,000.
(2) Earlier Spanish emigrants in other European countries and their descendants: 606,000.
(3) Earlier Spanish emigrants and their descendants in other countries (the US and the rest of the world): 97,000.
(4) Immigrants who obtained Spanish nationality in Spain and then emigrated to a country different to their country of origin: 105,000.
(5) Spaniards born in Spain and who emigrated to other European countries after 2009: 20,000.
(6) Spaniards born in Spain and who emigrated to Latin America after 2009: 7,000.
(7) Spaniards born in Spain and who emigrated to other countries (the US and the rest of the world) after 2009: 13,000.

On the whole, this means that Spaniards born in Spain only account for 2% of the total number of Spanish citizens living abroad.

Only a small number of Spaniards have emigrated as a result of the economic crisis and reduced job opportunities

Figure 5. Breakdown of Spanish citizens living abroad



Conclusion

Spanish society has been exceptionally immobile over the past few decades, since the mid 1970s, when the oil crisis put an end to the wave of migration that began in the 1960s. Compared to the populations of other countries, Spaniards have hardly left their own and even internal mobility, from one province to another, has been very slight since the 1980s, as often reported by those who analyse the Spanish labour market. It is, in short, a locally-rooted society, in which remaining close to family and friends has been a priority for most people. In fact, one of the obstacles to the internationalisation of Spanish companies has been the strong employee resistance against moving to another country. Even the State's foreign service has come up against the reluctance to move of its own civil servants.

Only this sedentary nature can explain the current alarm, which is hard to understand on the basis of actual figures. According to the latter –and they seem reliable– the number of Spaniards who were born in Spain and who currently reside abroad has only risen by 40,000 since the beginning of the crisis, the equivalent to 0.1% of the total Spanish population. It is true that the figures do not include those who leave the country in search of work and not finding what they were looking for return within a few months, but, by definition, only those who reside outside their country of birth can be accounted as emigrants. On the other hand, it is also true that Spain's immigrant population has dropped by a total of 152,000 since 2009, which is a mere 2% of those who were born in a foreign country and lived in Spain in 2009. However, the number of immigrants still in Spain (6,466,000) more than trebles that of Spanish citizens living abroad. Even amongst the main destinations of the more recent post-crisis Spanish emigration –Germany and the UK, for example– the number of working-age Spaniards residing there is substantially lower than the number of working-age Germans or Britons in Spain. There are 320,000 Germans and Britons between the ages of 15 and 64 in Spain, as opposed to 132,000 Spaniards of those very same ages living in Germany and the UK (INE). To summarise, the inordinate amount of attention the phenomenon is attracting in Spain can only be explained by the fact that it is being looked at from a decidedly local perspective, which is determined to see each job-seeking departure from Spain as something dramatic. Perhaps it would be necessary to change the perspective and ask why it is that a great many more people do not take the step of seeking better working or living conditions abroad.

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Merkel's safe pair of hands now carry a heavy burden

Angela Merkel has emerged as the undisputed winner of the German elections, an achievement not to be underrated. Her alliance between the CDU (Christian Democratic Union) and the CSU (Bavaria's Social Christian Union) has gained the best election results since 1990.

Miguel Otero-Iglesias

Angela Merkel has emerged as the undisputed winner of the German elections, an achievement not to be underrated. Her alliance between the CDU (Christian Democratic Union) and the CSU (Bavaria's Social Christian Union) has gained the best election results since 1990, when a large number of Germans thanked Helmut Kohl via the ballot box for his efforts to unify the country. Merkel's victory has been so overwhelming that she was close to an absolute majority, something the German public had not seen since Konrad Adenauer's landslide victory in 1957. Thus, with results such as these in her third elections Merkel is on the way to joining both Kohl and Adenauer as one of the greatest chancellors in post-war German history.

Despite being subjected to intense criticism from abroad, the results show the enormous support for Merkel's leadership style in managing the Eurozone crisis. Many Germans identify with her frugal, cautious and pragmatic approach. Her election campaign has been a success. In a context of uncertainty and crisis, most Germans have decided to put their faith in Merkel's safe pair of hands. For the first time they see a German leader fighting fiercely for German interests without coming across as hostile and arrogant. This hard-won trust should give Merkel ample elbow room to achieve her political objective, which is none other than to consolidate Germany's role as the anchor of economic and political stability in the heart of Europe.

However, what seems at first glance a propitious environment might turn out to be a daunting task. The truth is that the German electorate has dropped a heavy burden in Angela Merkel's hands. For a start, she will have to find a coalition partner, which will not be easy. The SPD (Social Democratic Party) was severely mauled after having been the CDU/CSU's junior partner in the Grand Coalition of 2005-09 and will therefore try to obtain major concessions before it agrees to repeating the experience. Demands are likely to range from the introduction of a minimum wage to ask for the removal of the heavy-weight Wolfgang Schäuble as Minister of Finance.

It also remains to be seen how Merkel will deal with the absence of a liberal party in the Bundestag for the first time in the Federal Republic's history. Indeed, apart from the CDU/CSU, all the other parties have a more left-leaning programme, which is certain to have an impact on the Bundestag's agenda and debates. This leaves Merkel with a greater exposure to possible blackmailing strategies by the SPD, vexing her party's more conservative elements.

To avoid this, she could go it alone with a minority government, relying on ad hoc coalitions. However, it is unlikely for two reasons: (1) it goes against the German tradition of creating stable coalitions; and (2) there is still the possibility of the SPD, Greens and *Die Linke* ganging-up against her at certain moments. The SPD and the Greens have both clearly said that they will not become partners with *Die Linke*, but this does not mean that they cannot join forces on particular policies. The chance at some point to finally erode Merkel's power might just be too tempting.

Furthermore, even if Merkel were to find ad hoc support from the Greens, it would be insufficient because the SPD has a majority in the upper house, the Bundesrat. For the same reason, it is highly for Merkel to opt for a permanent coalition with the Greens. In other words, her only option is a Grand Coalition with the SPD, for which she will have to pay a heavy price.

She will also have to confront other obstacles that will come her way. She is now at the zenith of her popularity, but is unlikely to maintain such levels of support throughout her third mandate. As with other long-lasting leaders –Kohl and Thatcher, for instance–, at some point the Germans will want to see a new hand at the helm. There are also doubts about whether the German economy can continue riding on the growth generated by the emerging markets. The latter's growth levels, especially China's, might decline and thereby harm the German export industry.

And then, of course, there is the complex and endless task of solving the Eurozone crisis. Considering that Greece, Ireland and Portugal are not yet out of the woods, over the next four years it is very likely for the German taxpayer to see the first bills coming his way, in the guise of public sector involvement in debt restructuring. This is sure to be picked up by the Euro-sceptic AFD (*Alternative für Deutschland*), which has not made it into the Bundestag but which is crammed with Economics professors who will be keen to explain these technical operations to the German public in simple terms.

In conclusion, Merkel is likely to have some difficult years ahead and she will have a heavy burden to carry. But, nevertheless, it would be a mistake to underestimate her capacity to overcome obstacles. Even her fiercest critics now recognise her political cunning. She could be prepared to pay a high price to have the SPD as a junior partner and then slowly, as she has done before, take up some of the SPD's programme and weaken it without pushing it completely out of the coalition.

Now that the FDP is gone, and with it the active advocacy of liberal economic policies, Merkel will probably be willing to accept more social policies at home and a softer fiscal consolidation in the Eurozone periphery so as to be better protected from a possible drop in demand from the emerging markets. There is an increasing trend in the CDU to believe that the three years of austerity were necessary to streamline public spending and increase competitiveness in the south, but that it is now the moment to underpin the current recovery with targeted fiscal stimuli. It would therefore be no surprise for Merkel to come under pressure from the SPD, with the support of the French socialists, to be more flexible regarding growth-enhancing policies and to then come out with François Hollande in favour of the same policies, selling them to the German public as a necessary compromise between France and Germany.

Merkel could even be bolder. Now that she has the trust of the German voters, she could use the overwhelming support to devote her efforts over the next four years to build the banking, fiscal and political union that are needed to consolidate the single currency. If she builds a solid coalition with the SPD she would even have the two-thirds majority needed in the Bundestag to change the German Constitution. Hence, if she were to be bold enough, she could follow in the footsteps of her mentor Helmut Kohl and go down in history as one of the great leaders of European integration. However, the option is unlikely and the other Eurozone member states would do well not to raise their expectations too high. The most probable outcome is for Merkel to err on the side of caution and confront each obstacle as it arises, with a cool head and in a piecemeal fashion. This is indeed what most Germans have voted for.

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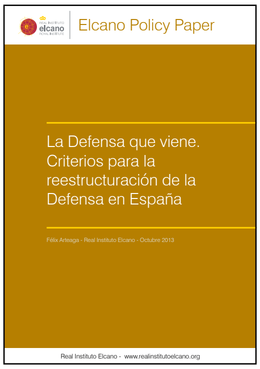

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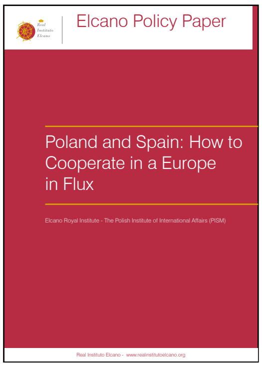

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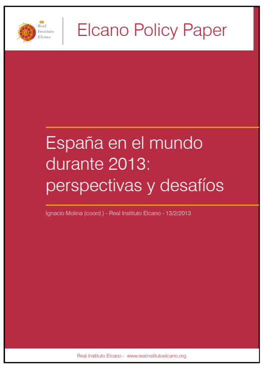

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Editado por: Real Instituto Elcano
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Elementos para el posicionamiento de España en la construcción de la agenda de desarrollo global
Iliana Olivié y Rafael Domínguez
Número 14 www. realinstitutoelcano.org Mayo 2013

Elementos para el posicionamiento de España en la construcción de la agenda de desarrollo global
Iliana Olivié y Rafael Domínguez
Editado por: Real Instituto Elcano
2013
Se centra en analizar el posicionamiento internacional de España en la configuración de la agenda post-2015, que remplazará los actuales Objetivos de Desarrollo del Milenio, y propone la posibilidad de asumir ciertas características y preferencias reveladas de la cooperación española como los ejes a partir de los cuales articular una estrategia general que permita guiar dicho posicionamiento.

Especiales y secciones web

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Estrategia Global Europea
Secciones: Cuatro think-tanks europeos han sido seleccionados para elaborar un informe que contendrá los aspectos fundamentales y los posibles elementos de una Estrategia Global Europea (EGE).
http://www.realinstitutoelcano.org/wps/portal/rielcano/EstrategiaGlobalEuropea

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Secciones: Componentes e indicadores, Estudio Elcano 2 (metodología), Resultados 2011.
http://www.realinstitutoelcano.org/wps/portal/rielcano/IndiceElcanoPresenciaGlobal

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Euro Crisis
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http://www.realinstitutoelcano.org/wps/portal/EspecialesElcano/Eurocrisis

01-02/10/2013
En el marco de las I Jornadas Euromediterráneas, organizadas por la Universidad de Lleida, **Gonzalo Escribano**, director del Programa de Energía, intervino en la mesa "Las relaciones euromediterráneas: hacia la superación de la parálisis actual?"

03-04/10/2013
Haizam Amirah Fernández, investigador principal del Mediterráneo y Mundo Árabe, acude en representación del Real Instituto Elcano a la Conferencia Anual de la red EuroMeSCo celebrada en París, titulada "A Transforming Arab World: Between Continuity and Change". En la misma presentó la ponencia en la sesión titulada "Beyond elections: deep democracy and state reforms in transition countries. The cases of Egypt and Tunisia".

09/10/2013
Emilio Lamo de Espinosa, presidente, participó en la IV edición del programa de Becas Fundación Botín para el Fortalecimiento de la Función Pública en América Latina.

11/10/2013
Charles Powell, director, participó en el Senates President's Forum organizado por la Universidad CEU San Pablo, que contó con la asistencia de los presidentes de los Senados de Estados Unidos.

17/10/2013
Haizam Amirah Fernández presentó la ponencia sobre "Las fuerzas armadas de Túnez" en la mesa redonda titulada "Las Fuerzas Armadas en las revueltas árabes: Actores de cambio o de continuidad" organizada por el Instituto Universitario General Gutiérrez Mellado.

17-18/10/2013
Dentro del IX Encuentro Empresarial Iberoamericano, organizado por el Consejo Empresarial de América Latina (CEAL) y celebrado en Panamá, **Emilio Lamo de Espinosa** moderó el panel titulado "La Alianza del Pacífico y el impacto en Latinoamérica".

20-23/10/2013
En el marco del VI Congreso Internacional de la Lengua Española *El español en el libro: del Atlántico al Mar del Sur*, organizado por el Instituto Cervantes y la Real Academia Española, **Emilio Lamo de Espinosa** intervino en el panel "El libro y la educación en la sociedad de la información".

21/10/2013
Haizam Amirah Fernández intervino en las jornadas sobre "La mujer en las primaveras árabes" organizadas por el Campus Mare Nostrum en la Universidad de Murcia.

22/10/2013
Dentro del seminario "Política de Vecindad, cambio social y sociedad civil en el Norte de África", celebrado en el Centro Cultural La Corrala (UAM), **Haizam Amirah Fernández** presentó la ponencia "La respuesta de la Unión Europea a las primaveras árabes"

23/10/2013
En el marco de las dentro XVI Jornadas de Derecho, Política y Defensa, organizadas por la Universidad de Burgos, **Haizam Amirah Fernández** presentó la ponencia titulada "¿Primavera árabe? Perspectivas de democratización y efectos sobre la seguridad europea",

29-31/10/2013
Haizam Amirah Fernández participó en calidad de profesor del módulo "Resolución de conflictos internacionales en el espacio euromediterráneo", en el Máster universitario "Relaciones euromediterráneas: la dimensión hispano-marroquí", organizado por la Universidad Internacional de Andalucía e impartido en la Universidad Abdelmalek Essaadi de Tánger (Marruecos).

06/09/2013
Debate "Siria: entre el ataque y la no intervención", con las intervenciones de varios investigadores de Elcano.

16/09/2013
Reunión del Grupo Asesor para el Informe Elcano "Elementos para una Estrategia Española de Acción Exterior".

17/09/2013
Reunión del Grupo de Trabajo "Estrecho amplio. Mediterráneo y Mundo Árabe".

17/09/2013
Almuerzo con Ioannis Kasoulides, ministro de Asuntos Exteriores de Chipre, que habló sobre "Cyprus and the Eastern Mediterranean".

17/09/2013
Reunión del Grupo de Trabajo sobre "Elementos para una Estrategia Española de Acción Exterior".

18/09/2013
Reunión del Grupo de Trabajo de Economía Internacional que contó con la intervención de Miguel Otero Iglesias, de la London School of Economics, sobre "¿Dónde estamos en la crisis del euro?".

20/09/2013
Reunión con Antonio G. Rodiles, director de "Estado de SATS", que habló sobre "Reformas y política en Cuba".

24/09/2013
Debate en torno al último libro de William Chislett, "Spain. What Everyone Needs to Know", con las intervenciones de Emilio Lamo de Espinosa, Fernando Gutiérrez Junquera y de Antonio Muñoz Molina, además del autor.

26/09/2013
Desayuno de Trabajo con el Ichiro Fujisaki, exembajador de Japón en EE.UU., que habló sobre "El futuro de Asia-Pacífico y Japón".

Patronato

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