

From region to world: geographical analysis of China's global presence

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Executive summary

The Elcano Global Presence Index confirms China's sustained rise within the international system over recent decades. The advance has been driven primarily by the economic dimension, which constitutes the core of its external projection, although in the past decade its military presence has grown significantly as well. The resulting pattern reflects a comprehensive expansion strategy, grounded on a robust economic base and an increasingly visible security component.

The geographical distribution of this projection reveals two central features. First is the priority granted to its immediate neighbourhood, particularly in Asia-Pacific, where China has consolidated its position as a dominant actor. The second is a risk reduction strategy based on diversifying partners and markets, aimed at mitigating vulnerabilities stemming from tensions with the main Western powers.

In this context, China has reduced its relative exposure to the US, the EU and Japan, while strengthening ties with the so-called Global South. However, the reorientation is not uniform. Its presence is firmly consolidated in Asia Pacific, followed by Latin America, while developments in Africa and the Middle East have been more moderate and uneven.

Looking ahead, the outlook is uncertain. The year 2024 marks the first instance of a decline in China's global presence, both in absolute and relative terms. The shift may signal a turning point in China's expansionary trajectory or, alternatively, a cyclical correction within a longer-term process.

This Policy Paper raises relevant questions regarding China's international trajectory, as well as the global or regional character of its power. It is hoped that it will provide robust data and evidence on the evolution of globalisation and multipolarity.

1. Introduction

It is well known that the process of globalisation over recent decades cannot be understood without the rise of Asia, particularly China, and the gradual shift of the centre of gravity of the world economy towards the Pacific. The rise has been underpinned by an export-oriented development strategy and rapid technological advancement that, through an active role of the state, has profoundly transformed China's productive structure. From its initial strategies aimed at attracting offshoring industrial processes in segments of lower value-added, China has progressively consolidated its productive capacities through learning and technological development, combined with an active industrial policy that has enabled it to move into higher value-added activities and even to attain leadership in more advanced technologies, challenging the traditional primacy of the US, the EU and Japan.

China's political and economic model also shapes its conception of the international order, which is markedly state-centric and post-Westphalian. Within this framework, sovereignty and political control occupy a central position, in contrast to the neoliberal paradigm that accords greater primacy to markets and private actors and, consequently, a more diffuse role to the state (Esteban, 2025). China's trade surplus provided it with growing capacity for external financing, partly directed towards the US debt market, thereby strengthening a trade and financial interdependence between the two that until recently was understood as a mechanism of international security. However, as this interdependence deepened, and China moved up the more technologically advanced segments of global production chains, the logic has evolved from predominantly cooperative, into direct rivalry with the US, with implications for the EU, and towards the development of strategic autonomy (Esteban & Otero, 2025).

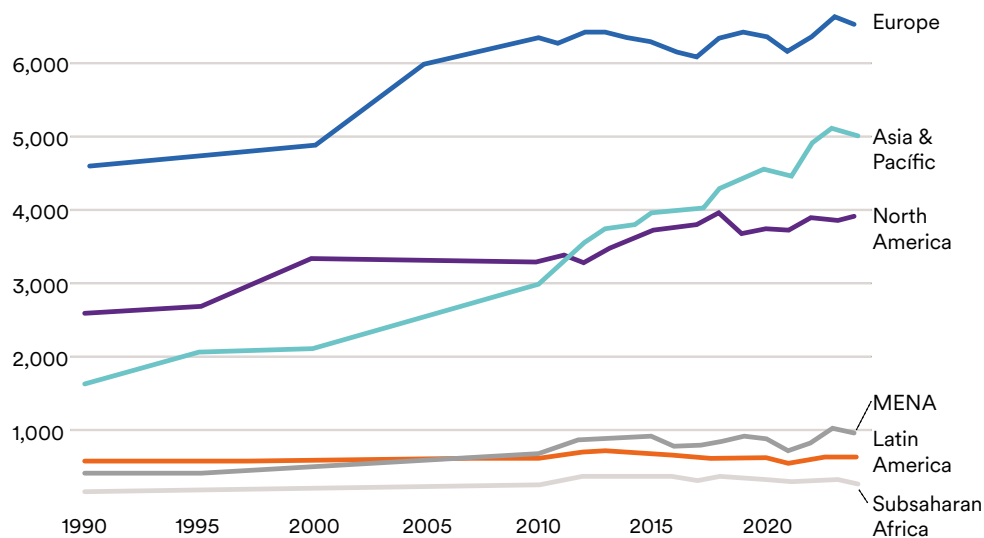
Contemporary globalisation is therefore characterised by increasing fragmentation and geostrategic rivalry (Gracia & González, 2025). Rather than a homogeneous global space, the world economy is increasingly structured around distinct regional integration areas that, in addition, were already the centripetal forces of globalisation as previously understood, alongside a form of governance extended to their respective spheres of influence.

The gap between countries' actual external projection and the interest-driven narratives surrounding their expansion and influence is one of the key elements for understanding the new international order. Against this backdrop, this paper examines the evolution of China in the Elcano Global Presence Index, providing geographically disaggregated data with the aim of identifying with precision how China articulates its relations with different world regions and how these outcomes align with the priorities declared in its foreign policy strategy. From this perspective, it is pertinent to ask to what extent China is truly a global power (as opposed to a regional one), whether it has increased its projection in a homogeneous manner in all regions, and whether this projection follows similar patterns across the globe. This paper builds on previous exercises focusing on the US (Olivié & Gracia, 2024) and the EU (Olivié & Gracia, 2020), thereby completing a geographical analysis of how the main protagonists of the globalisation process over recent decades have articulated their global presence.

2. The rise of China

The geographical shift of the globalisation process is clearly reflected in the results of the Elcano Global Presence Index. By observing the evolution of aggregated global presence by region (Figure 1) one can see a configuration centred primarily around Europe, North America and Asia-Pacific. Not coincidentally, these regions host the countries with the highest levels of development and the most ambitious processes of regional integration. While Europe continues to occupy first place in this regional ranking, it has shown a marked slowdown since before 2010 and even lost global presence in specific years. By contrast, Asia-Pacific is the region registering the largest aggregate increase, with a clear acceleration from 2010 onwards that has enabled it to overtake North America, whose growth has been more modest and increasingly sluggish in recent decades.

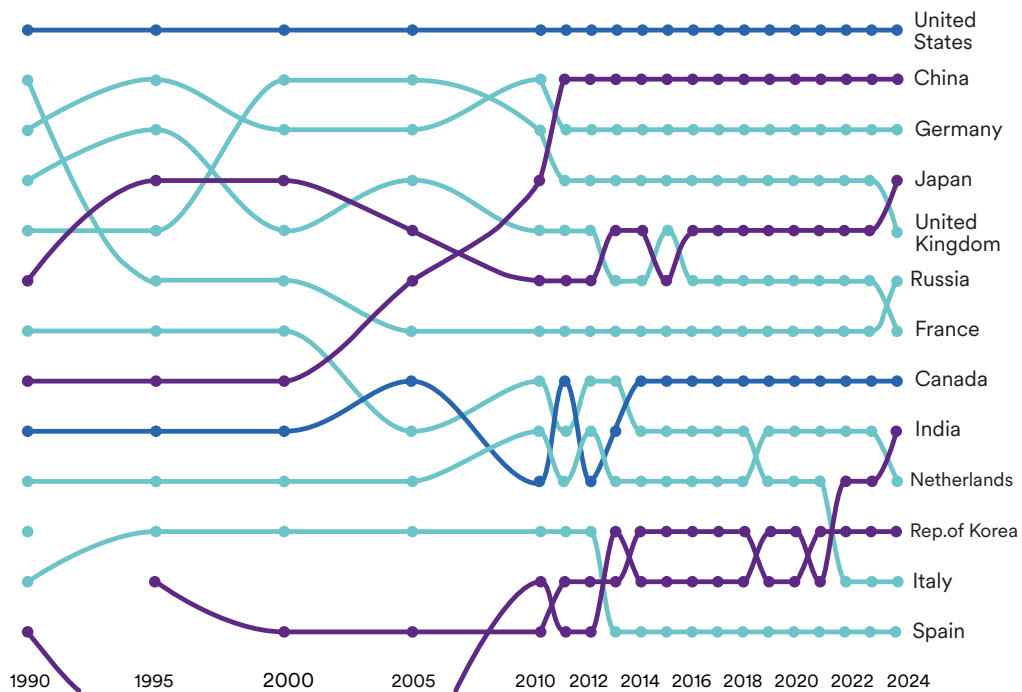
Figure 1.
Global presence by world regions, absolute value, 1990-2025



The unequal intensity of growth across regions is reflected in the evolution of global presence shares, that is, their relative weight in the world aggregate. While Europe's share of global presence declined from 45% in 1990 to 37% in 2024, and North America's from 26% to 22%, Asia-Pacific's share rose from 16.5% to 28.8% over the same period. It is also true that, although all countries in the region follow an upward trajectory, this evolution is highly heterogeneous. China, and to a lesser extent Japan, South Korea and India, are the main drivers of this dynamism due to their economic size and population. Of these 28 percentual points, 11 correspond to China, five to Japan, and around 2.5 each to India and South Korea.

Figure 2.

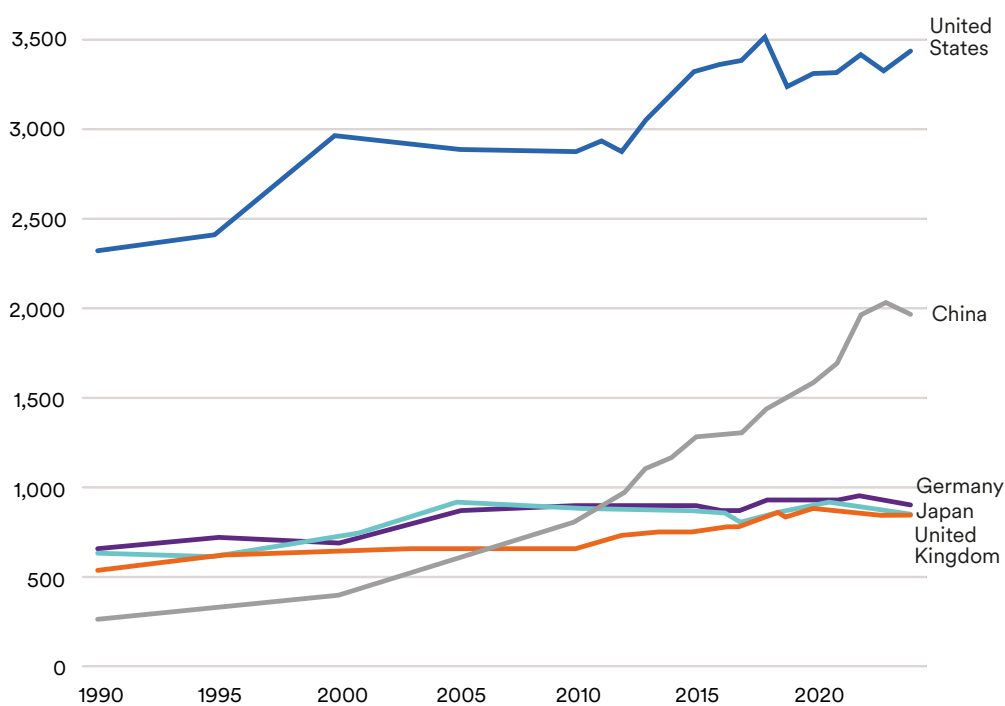
Main positions in the global presence ranking, 1990-2024



Source: Elcano Royal Institute.

The increase in the global presence share of Asian countries has been accompanied by their rise in the ranking (see Figure 2). Since 2010 China has occupied second place, overtaking traditional powers such as Germany, France and the UK, thereby consolidating its regional leadership vis à vis Japan. The latter, for its part, has managed to halt its decline after decades of losses and has recently regained fourth place, a position it already held in the 1990s. More recent is India's ascent. Until 2010 India did not feature among the top 13 countries in the ranking, yet by 2024 it had reached ninth place, reflecting a late but accelerated incorporation into the core circuits of globalisation. South Korea has likewise consolidated its 11th position, surpassing European economies such as Italy and Spain.

Figure 3.
Evolution of the five countries with the highest global presence, 1990-2025

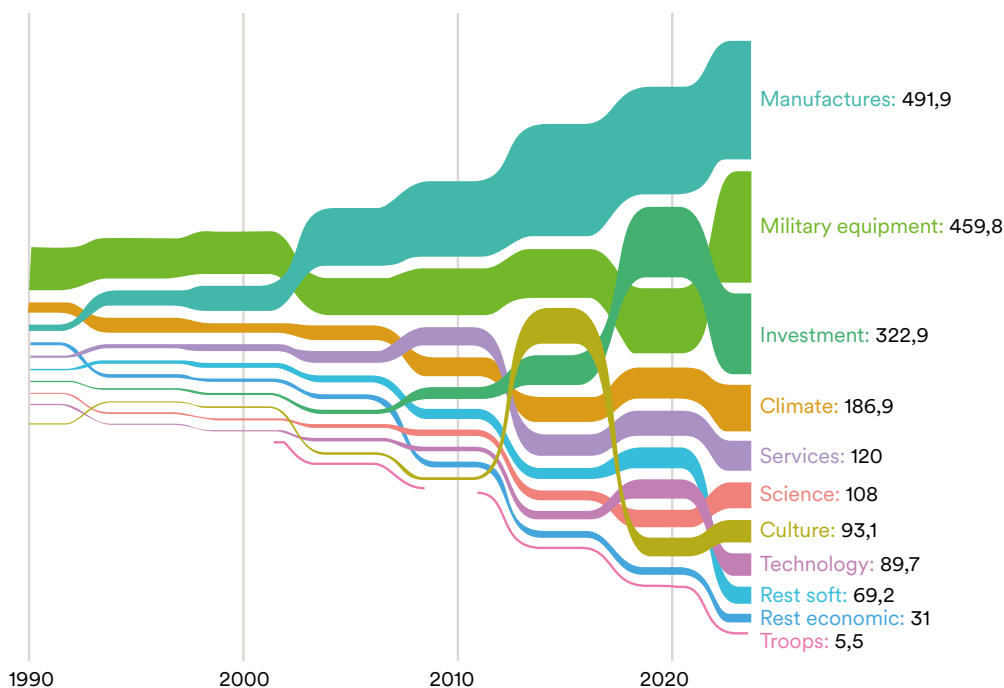


Source: Elcano Royal Institute.

China's strong rise highlights the intense process of convergence with the US, fuelling the idea of a new bipolarity in the international order. However, in terms of global presence, the gap between the two remains significant (see Figure 3), as does the gap with the EU, shown in other analyses. Admittedly, the distance has narrowed substantially: in 2024 the value of US global presence was 1.7 times that of China, compared with 3.5 times in 2010 and 8.2 times in 1990. Nonetheless, future trends remain uncertain, as 2024 marks the first year in the series in which China registers a decline in global presence, both in absolute terms and as a share of the world total.

China's presence has not only displayed greater dynamism than that of other powers but has also undergone a transformation in its nature over the past decade, as reflected in the changing relative weight of its different components (see Figure 4). The economic dimension remains the central pillar, accounting for 49% of its global presence in 2024. However, the relative weight of the economy has declined by seven points compared with 2014, mainly in favour of the military dimension and, to a lesser extent, the soft dimension.

Figure 4.
Evolution of the absolute value of China's global presence by indicators, 1990-2025



Source: Elcano Royal Institute.

In the economic dimension China has increased its share of global presence from 1.2% in 1990 to 10% in 2024, with manufactured exports still constituting the most significant indicator. In recent years, however, the most dynamic component has been Chinese outward investment, which accelerated sharply from 2014 onwards, followed more recently by exports of services. This trajectory is consistent with the transformation of China's role in the main global value chains, shifting from a primarily export-oriented position towards a growing weight as an external investor. At the same time, the expansion of services reflects a deeper international fragmentation of production and a more complex insertion into global value chains, not only as a manufacturing platform but also as a provider of services and higher value-added activities.

China's military presence has also experienced significant growth in recent years, in the context of increasing remilitarisation in the region. The value of the military equipment indicator, which consists mainly of naval units, rose from 196.7 in 2015 to 458.8 in 2024. This accounts for more than 40% of the total military projection in Asia-Pacific and is the second most relevant indicator of China's overall projection. The pattern, however, does not extend to troops deployed abroad, which remains consistent with China's policy of non-intervention and its low profile in overseas missions. This contrasts with other countries in the region, such as India, Indonesia and Malaysia, where

deployed troops and participation in international missions play a more prominent role. Such a model of military insertion, characterised by high naval deployment capabilities but a low volume of troops abroad, is shared with Japan and South Korea. Together, the three countries account for 70% of the region’s military equipment and 13% of deployed troops.

Figure 5.
Evolution of the value recorded by China in each indicator, 1990, 2010 & 2024



Source: Elcano Royal Institute.

With regards to soft presence, China has an asymmetric profile. On the one hand, values in this dimension remain generally lower than those of economic and military presence (see Figure 5). On the other, several of its traditional indicators have stagnated or even declined, such as migration, tourism, development cooperation or education. This points to a limited skill for persuasion and what is generally understood as soft presence. By contrast, growth is concentrated in a small set of indicators closely linked to China’s position in global technological chains, such as technology, science and information, as well as in the field of climate change.

Overall, the evolution of China’s global presence reveals an internal rearranging of its most relevant indicators. The economic dimension remains the key factor, underpinned by manufactured exports, while outward investment and service exports linked to the increasing complexity of global value chains have grown steadily. This dynamic is also reflected in the expansion of soft indicators closely associated with these processes, such as science, technology and climate, while China’s military presence has increased

primarily through greater equipment. As a result, in 2024 the economic dimension accounted for 49% of China's global presence, compared with 56% in 2010, while the military and soft dimensions rose to 24% and 28%, respectively.

3. The priorities of Chinese foreign policy

China's foreign policy is oriented towards preserving regime security, an objective clearly reflected in the National Security White Paper published in May 2025. The document depicts a threatening international environment and places national security as the absolute priority, adopting a holistic conception in which the security of the Chinese Communist Party occupies the highest position.

Accordingly, China seeks to strengthen its internal capabilities and reduce dependencies on countries with which it maintains geopolitical tensions, while simultaneously reinforcing its external projection in order to shape a global order more favourable to its interests. In his report to the Twentieth Congress of the Chinese Communist Party, Xi Jinping stressed the need to elevate China's international standing and to play a more prominent role in global governance, setting out concrete objectives such as strengthening soft power, supporting economic globalisation and allocating greater resources to development cooperation.

With regard to priorities, relations with major powers and with China's immediate neighbourhood occupy a central place in its foreign policy, given their importance for ensuring security and sustaining development. In parallel, China attaches a growing importance to its ties with the Global South, through which it seeks to diversify economic relations and reduce dependencies. More broadly, the orientation of Chinese foreign policy pursues four fundamental objectives: (a) balancing relations with the US and dividing its allies; (b) supporting and sheltering behind Russia; (c) leading its neighbourhood; and (d) diversifying and forging coalitions with the Global South.

3.1. Balancing relations with the US and dividing its allies

Relations with the US are the most decisive for China, which makes maintaining balanced and functional ties with Washington a key priority. At the ceremony marking the 45th anniversary of the establishment of diplomatic relations, Wang Yi described the link as the 'most important and complex bilateral relationship in the world'. Since the beginning of his tenure, Xi Jinping has advocated a 'new model of major power relations' to guide relations with the US, based on equality and mutual respect for core national interests, which China considers a prerequisite for safeguarding its sovereignty, territorial integrity and security (Esteban, 2017).

At the same time, China is aware of the more aggressive shift towards a policy of containment by the US since the first Trump Administration. The volatility of the bilateral relationship appears repeatedly in the National Security White Paper, which highlights growing external pressure from Western forces seeking to contain, suppress and restrain China. The situation has led China to double down on strengthening its technological and industrial capabilities and to mitigate its dependencies on the US, with the aim of reducing Washington's leverage and limiting any potential for external destabilisation of the regime (Esteban, 2022).

More broadly, China seeks to divide US allies and weaken Washington's influence through a combination of enhanced offers of cooperation and pressures designed to discourage alignment with US policy towards China. The approach is also evident in its relationship with Europe, which is increasingly shaped by geopolitical dynamics and marked by a more defensive tone, despite Beijing having devoted two policy documents to strengthening relations with the EU, in 2003 and 2014. The latter sought to outline a five-to-10-year cooperation plan focused on strengthening political dialogue and the global agenda, economic and financial cooperation, cooperation in industry, transport and science, as well as social and legal issues.

3.2. Supporting and sheltering behind Russia

Russia is a key partner for China, both because of mutual support in multilateral forums and due to the strategic convenience of maintaining a like-minded regime that constrains the capacity of the US to exert pressure. Chinese authorities, including Xi Jinping, frequently refer to relations with Russia as a 'fundamental priority' and emphasise the resilience of the relationship, as well as the complementarity of their economies and their

visions of the international order. This is made explicit in the White Paper presenting the link with Moscow as a model of cooperation between neighbouring countries, underpinned by the resilience and strategic value of bilateral relations. Joint documents in recent years have placed an increasing emphasis on political coordination with Moscow, particularly on security matters, alongside a steady deepening of their economic ties.

3.3. Leading its neighbourhood

Given the complexity of its land and maritime borders, China identifies its neighbourhood as a key space for national development, prosperity and security. As a result, the neighbourhood constitutes a priority for Chinese diplomacy, as evidenced by the meeting held in April 2025 of a leading group chaired by Xi to discuss the issue.

China aspires to lead its neighbourhood, particularly through economic integration, while seeking to counterbalance Washington's influence. The National Security White Paper underscores the importance of the Asia-Pacific region in the context of rising global geopolitical tensions. Accordingly, China promotes a holistic relationship with its neighbours that integrates trade, security and soft power, with the objective of reinforcing regional stability and reducing dependence on more distant actors or those aligned with the US. This approach was reflected in Xi's speeches marking the 30th anniversary of relations with ASEAN in 2021 and with Central Asia in 2022, where he emphasised five shared commitments: political dialogue; traditional and non-traditional security; economic cooperation and connectivity; sustainability; and social and cultural exchanges.

3.4. Diversifying and forging coalitions with the Global South

China has intensified its diplomatic engagement with the Global South, encompassing Africa, Latin America and the Middle East, which it considers a natural and key partner for advancing the reform of global governance, expanding its diplomatic support base and reducing economic dependencies. In the National Security White Paper, China identifies the Global South as an essential anchor for forging unity, strengthening its role in international governance and acting as a stabilising factor. Similarly, in its 2021 White Paper on Development Cooperation, China presented itself as a responsible power committed to increasing its support for developing countries, both through the Belt and Road Initiative and through regional cooperation mechanisms, with an emphasis on global health, the Sustainable Development Goals and capacity building.

A significant share of cooperation with these regions is channelled through multilateral initiatives and regional platforms such as the Forum on China-Africa Cooperation (FOCAC), the China-CELAC Forum and dialogue mechanisms with Arab States and the Gulf Cooperation Council. China's declared priorities follow a common pattern centred on deepening political relations, economic and development cooperation, and strengthening social and cultural exchanges, albeit with regional variations.

In the Middle East, China emphasises security, technological innovation and energy cooperation, and also positions itself as a security actor through concrete initiatives and proposals aimed at redesigning the region's collective security architecture. In his speech at the ceremony marking the 10th anniversary of the ministerial conference of the China Arab States Cooperation Forum, Xi proposed five frameworks for cooperation: (a) one focused on innovation to promote joint technological development; (b) one on investment and finance to strengthen financial ties; (c) an energy framework combining traditional cooperation with the promotion of renewable energy; (d) an economic and trade framework aimed at advancing free trade agreements; and (e) a framework for exchanges between societies, intended to reinforce cultural, educational and social cooperation.

With regards to Africa, China's discourse within FOCAC focuses on industrial development, infrastructure connectivity, trade facilitation, green development, capacity building and connectivity, healthcare, educational exchanges, and peace and security. According to the regional action plan, China has committed to implementing 10 initiatives over the next three years, covering trade and industrial cooperation, connectivity, development cooperation, healthcare, rural revitalisation and wellbeing, people-to-people exchanges, green development and common security.

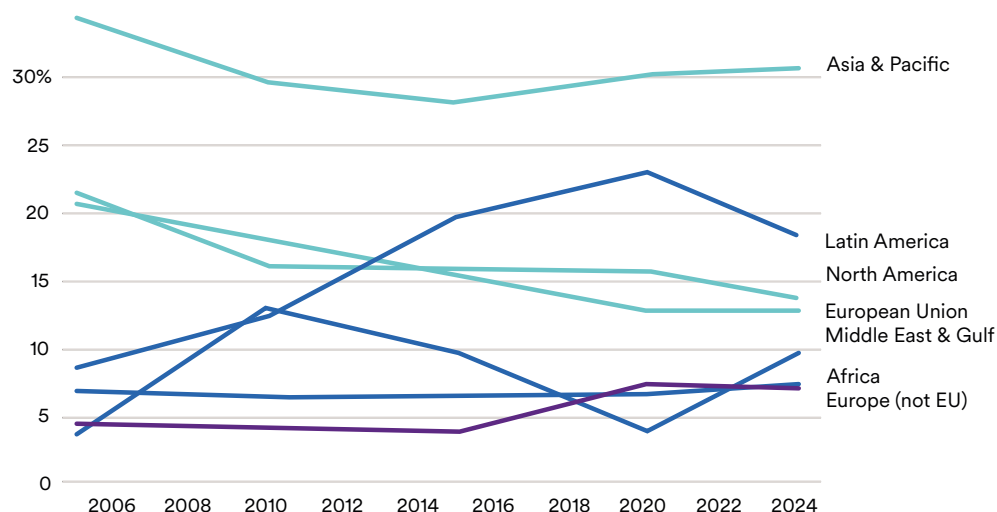
In his address at the most recent China CELAC Forum, Xi Jinping structured cooperation with Latin America around five programmes: (a) a solidarity programme focused on exchanges on international affairs; (b) a development programme centred on trade, infrastructure, agriculture, food, energy and minerals; (c) a civilisation programme devoted to cultural cooperation; (d) a security programme oriented towards stability and issues such as cybersecurity, anti-corruption and the fight against illicit trafficking; and (e) finally, a people-to-people connectivity programme aimed at strengthening social and human exchanges. Taken together, these five programmes outline a comprehensive strategy through which China seeks to consolidate a multidimensional and long-term relationship with Latin America.

As shown above, China's global presence has grown markedly over recent decades. However, this does not necessarily imply that such growth has been homogeneous across all regions or countries. In the previous section,

4. The geographical distribution of China's global presence

the priorities of China's foreign policy and the differentiated ties it seeks to maintain or establish with each region were outlined. This section geographically disaggregates the results of the Elcano Global Presence Index in order to analyse how China projects itself across different regions and the extent to which its projection aligns with the objectives declared in its foreign policy documents.

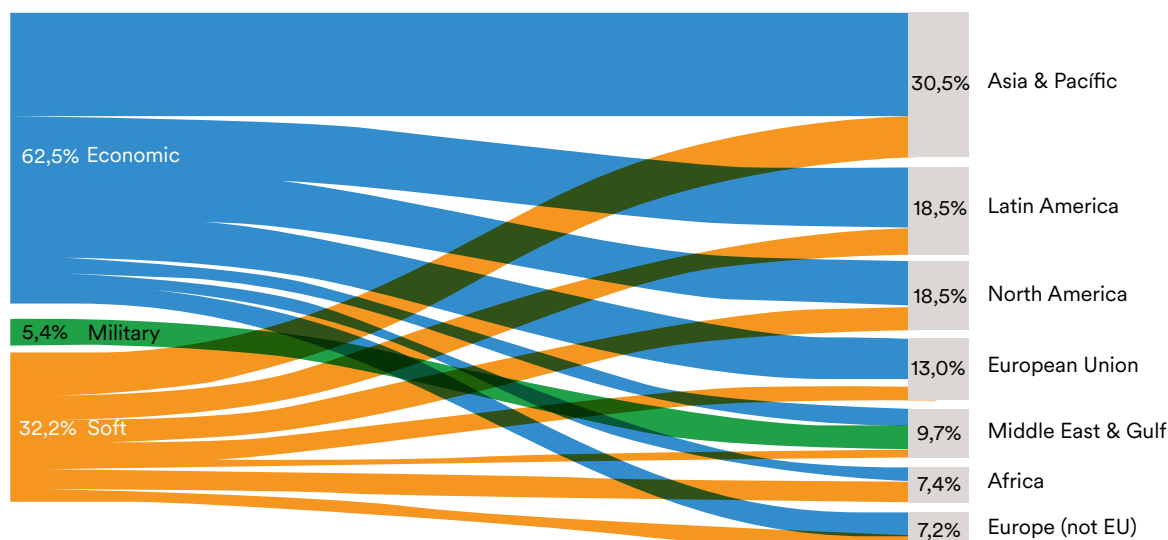
Figure 6.
Evolution of China's global presence by region, 2005-24, share of total (%)



Source: Elcano Royal Institute.

First, as shown in Figure 6, China's global presence is highly concentrated in its own region, Asia-Pacific, which accounted for 30.5% of its global presence in 2024. China is therefore, above all, a regional power. This finding is consistent with recent debates on the geographical dimension of globalisation (O'Neil, 2022) and with results obtained for the US (Olivié & Gracia, 2024) and the EU (Olivié & Gracia, 2020). Secondly, the weight of transpacific relations is also significant, both with North America, at 13.8%, and especially with Latin America, at 18.5%, a region where China's presence has intensified notably in recent years. The EU emerges as the third most relevant region, accounting for 13% in 2024, at levels similar to those of North America and likewise showing a relative loss of weight compared with the strengthening of ties with the rest of Europe, which includes countries such as Russia, Turkey and the UK. It should be noted that, in absolute terms, China's presence increases in all regions, but at unequal rates. This uneven growth reshapes relative weights and increases China's geographical diversification, with a greater role for Latin America, the Middle East and Africa, to the detriment of North America and the EU..

Figure 7.
Breakdown of China's global presence by region and dimension, 2024 (%)

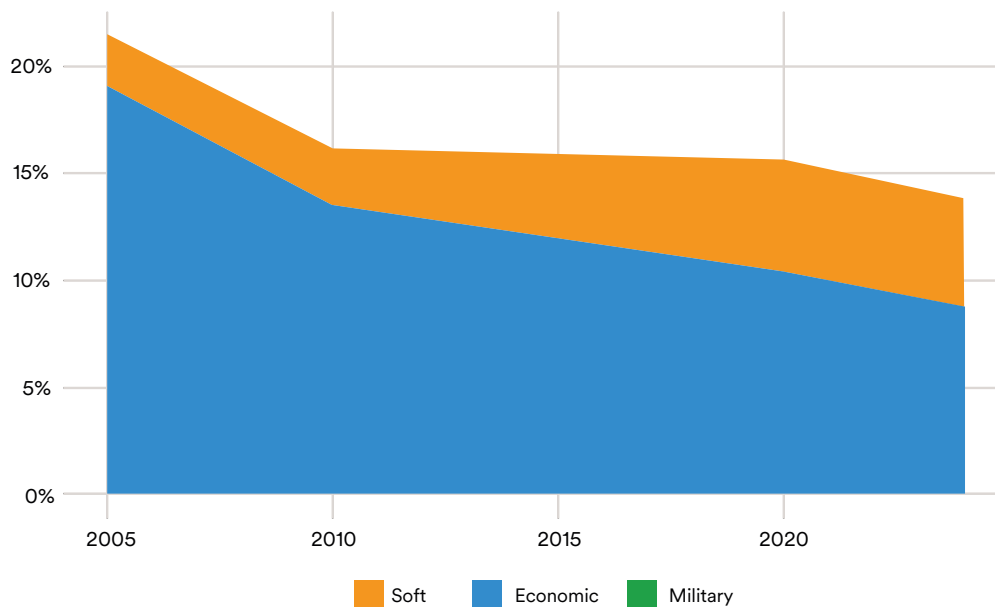


Source: Elcano Royal Institute.

Figure 7 details the geographical distribution of China's presence in 2024 by dimension. As shown, economic projection is dominant in all regions except the Middle East, where the military dimension prevails, and Africa, where the soft dimension is more prominent. In economic terms, China's presence is strongest in Asia, followed by Latin America and North America. The EU ranks fourth as a destination for China's economic presence, but not for its soft presence, where ties with the African continent are stronger.

Figure 8.

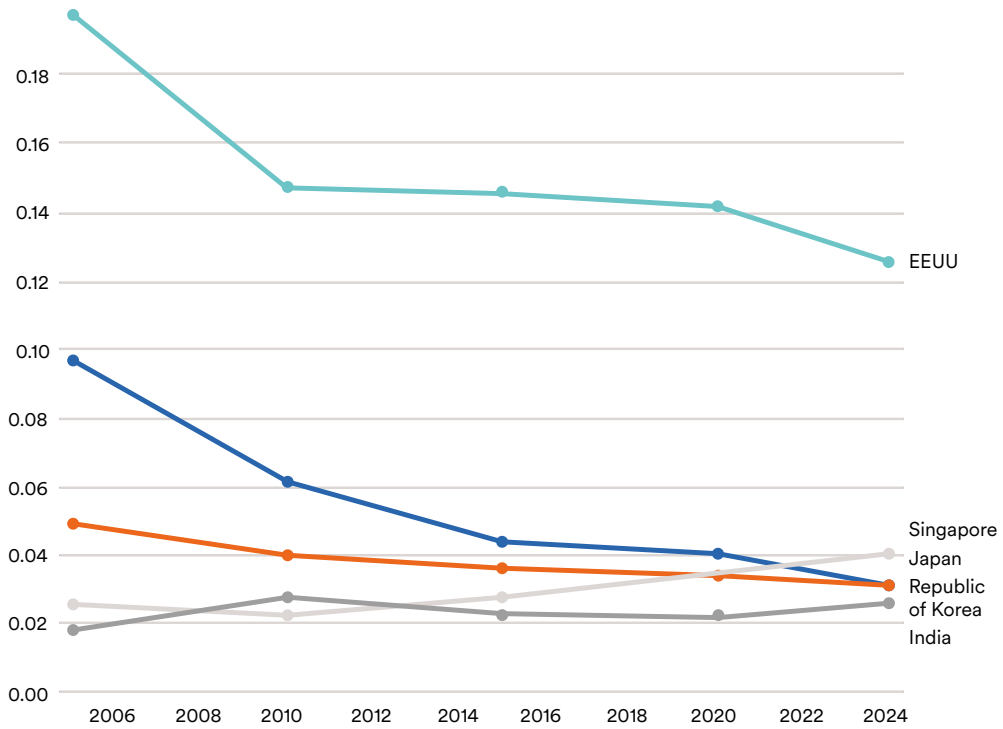
Evolution of China's global presence in North America, 2005-25, share of total (%)



Source: Elcano Royal Institute.

North America's share of China's global presence declined from 25% in 2005 to less than 15% in 2024 (see Figure 8). The trend is explained by the diffusion of China's economic presence, mainly due to faster growth in exports and investment towards other world regions. By contrast, soft ties have increased, but only in three specific indicators: culture, science and technology. Even so, the US remains the single most important country in China's external projection (see Figure 9), by a wide margin over the following positions, occupied by Asian countries.

Figure 9.
Evolution of China's global presence with its main partners, 2005-24, share of total (%)

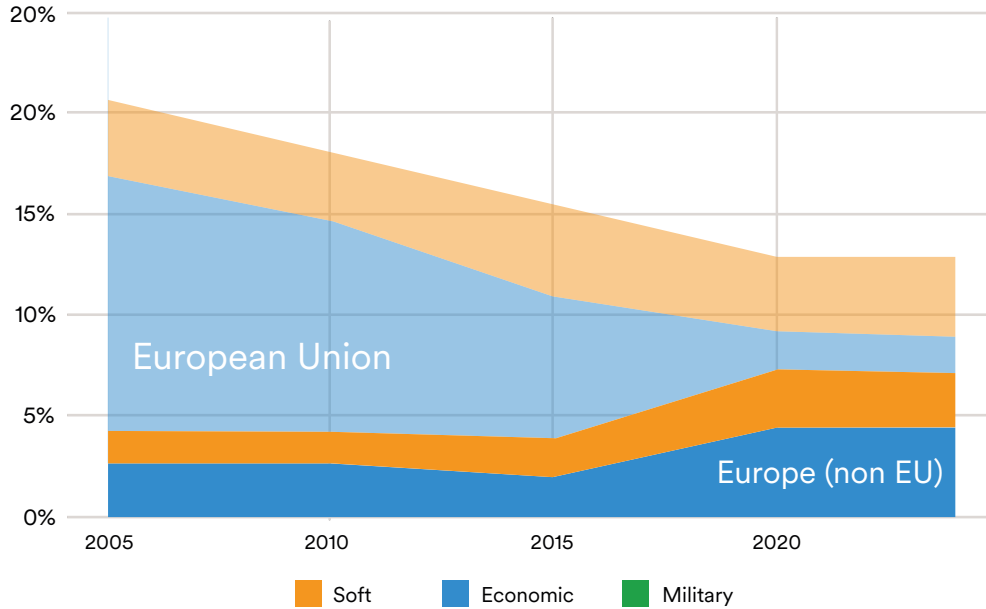


Source: Elcano Royal Institute.

Accordingly, and in line with its declared objectives, the US remains China's most important partner. At the same time, a clear trend towards reducing interdependence has consolidated, driven by the diversification of ties towards other regions of the world. A similar pattern can be observed in China's projection towards the EU, which follows a trajectory comparable to that described for the US, but markedly different from that recorded for the rest of Europe, that is, non-EU countries (see Figure 10).

Figure 10.

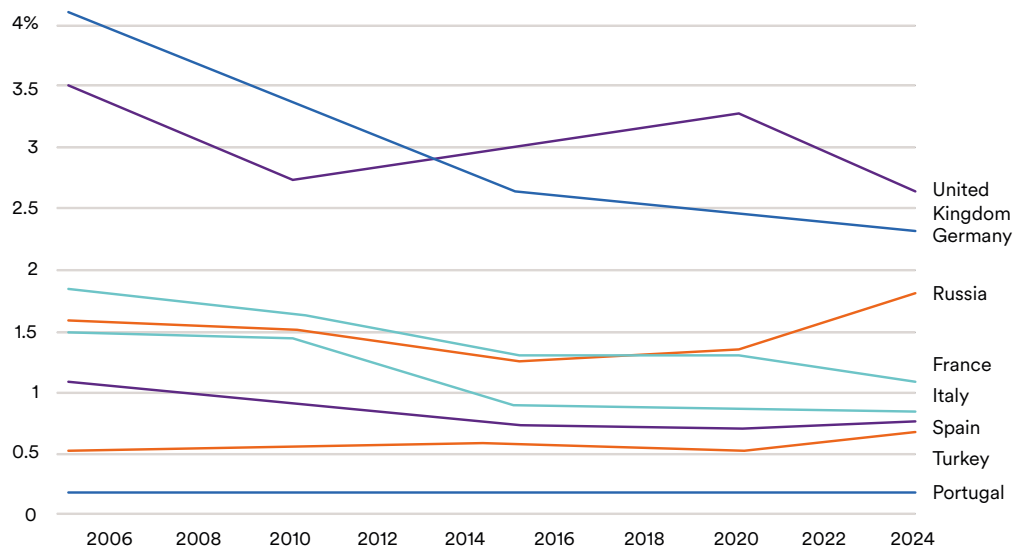
Evolution of China's global presence in Europe, 2005-25, share of total (%)



Source: Elcano Royal Institute.

China's presence in Europe therefore displays differentiated trends. While ties with the EU remain more significant, there is a relative loss of weight explained primarily by the economic dimension, in line with the pattern observed in relation to the US. By contrast, European countries outside the EU gain relative importance. Part of the increase observed from 2020 onwards is related to the UK's exit from the EU and its consequent reclassification, as well as to the growing relevance of relations with Russia and Turkey, while ties with the main EU member states lose relative weight (Figure 11).

Figure 11.
Evolution of China's global presence in the main European countries, 2005-24, share of total (%)

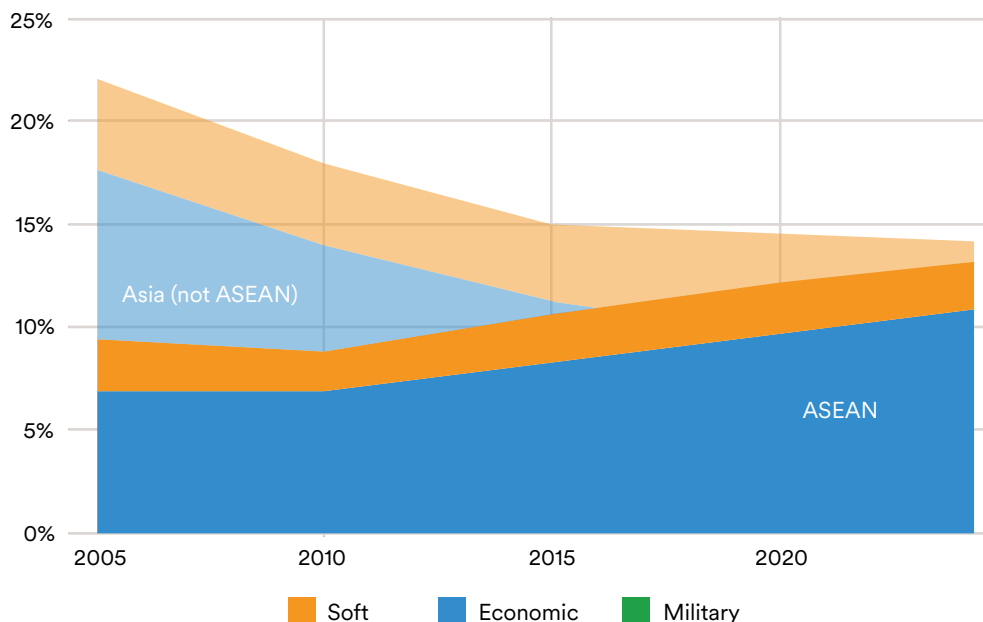


Source: Elcano Royal Institute.

Within the Asia Pacific region, differentiated trends can also be identified depending on the subregion considered (see Figure 12). On the one hand, the absolute volume of China's presence is greater in countries that are not members of ASEAN, but their relative weight declines, again mainly due to the economic dimension. This is an expected outcome given the size and level of development of the countries involved, including India, Japan and South Korea, and a trend strongly shaped by the reduction of ties with Japan, as shown in Figure 9. By contrast, China's presence in ASEAN has grown steadily, reflecting its strategy of regional leadership and geographical diversification, and reinforcing productive and commercial linkages around regional value chains.

Figure 12.

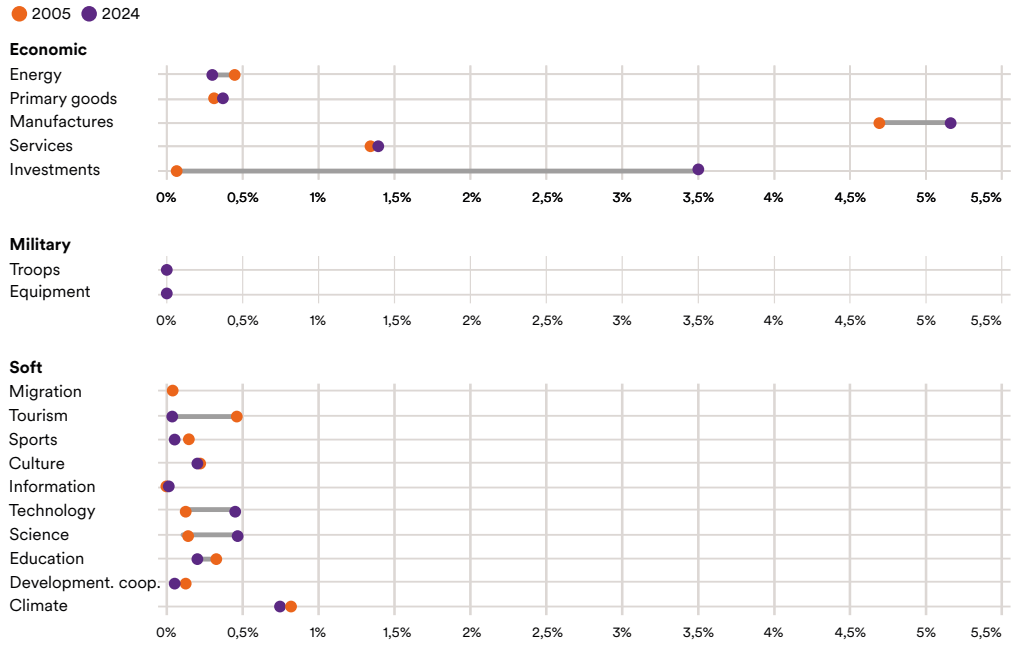
Evolution of China's global presence in Asia, 2005-25, share of total (%)



Source: Elcano Royal Institute.

This tendency towards a stronger regional consolidation is not new, but all indications suggest that it will accelerate in the coming years due to the combination of structural and cyclical factors that are reshaping global value chains. First, the economic development of both China and the region, and therefore the expansion of their domestic markets, favours deeper productive and commercial relations among them. Secondly, there is a strengthening trend of industrial relocation from China to other countries in the region, driven largely by rising tariffs and other protectionist measures, but also by increasing labour costs and the resulting incentive to relocate labour-intensive production. As a result, regional economic ties have consolidated, driven by manufacturing indicators and especially by Chinese outward investment (see Figure 13).

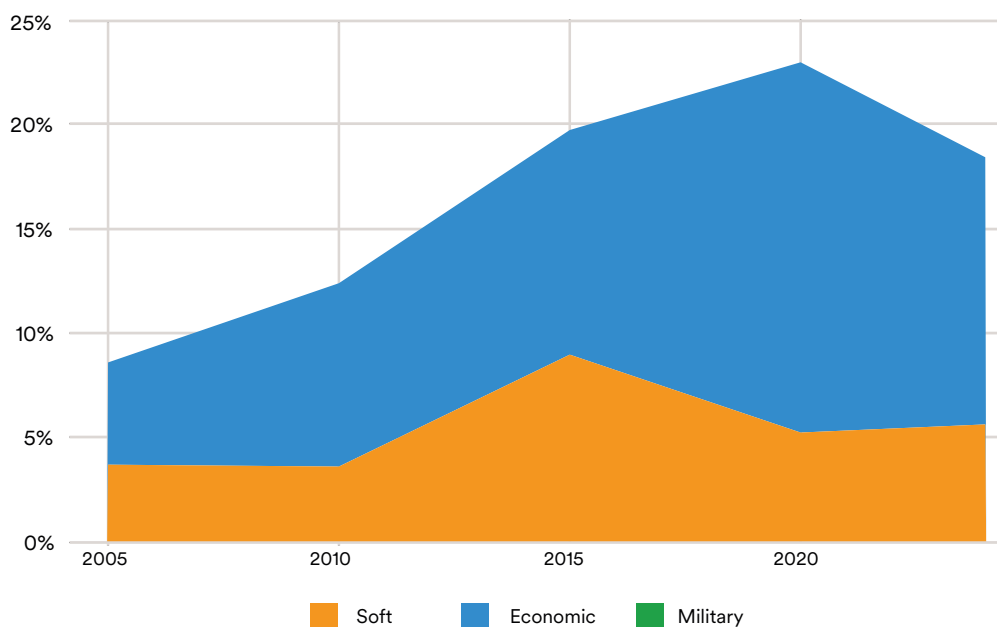
Figure 13.
Percentage of China's global presence projected on ASEAN, 2005 & 2024



Source: Elcano Royal Institute.

Overall, the evolution of China's global presence reveals a reduction in the relative weight of traditional powers, namely the US, the EU and also Japan, alongside a strengthening of regional ties, which China seeks to extend to the so-called Global South. However, within this heterogeneous group, differentiated trends are also evident. While Latin America has consolidated its position as the second most important region in China's external projection, as shown in Figure 6, growth has been much more modest in Africa and the Middle East and is driven by different indicators.

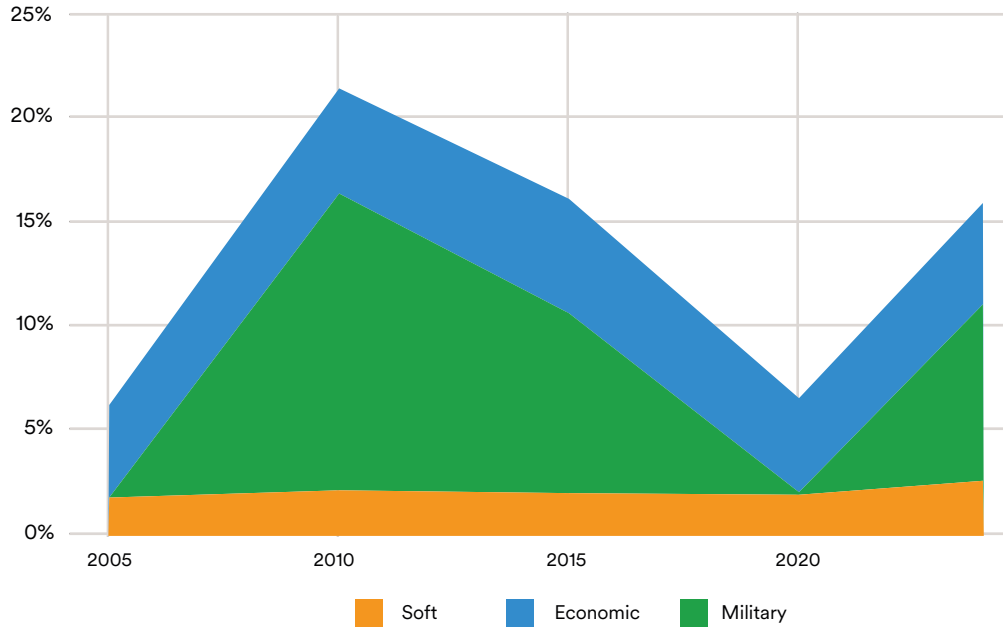
Figure 14.
**Evolution of China's global presence in Latin America, 2005-25,
 share of total (%)**



Source: Elcano Royal Institute.

As shown in Figure 14, the importance of Latin America in China's external projection has increased steadily, particularly since 2015, driven by the economic and soft dimensions. Within the economic dimension, the evolution of Chinese investment plays a central role, particularly towards Caribbean countries. Specifically, investment directed to these countries accounts for 9% of China's total external presence, of which only 0.08% corresponds to investment in Mexico. This suggests, on the one hand, that a significant share of this foreign direct investment may be driven more by its function as a financial asset or a mechanism for tax avoidance than by the expansion of productive capacities in the region. On the other hand, with regard to trade and investment with Mexico, its growing weight appears to be more closely linked to Mexico's membership in the North American integration space under the USMCA than to a logic of deeper integration with Latin America as a whole. This differentiated evolution within the region is also visible in the soft dimension, where Mexico accounts for 0.3% of the 5.9% projected to the region. Although this is a small share, it still exceeds that of countries such as Brazil, at 0.2%, or Argentina and Chile, both at 0.1%.

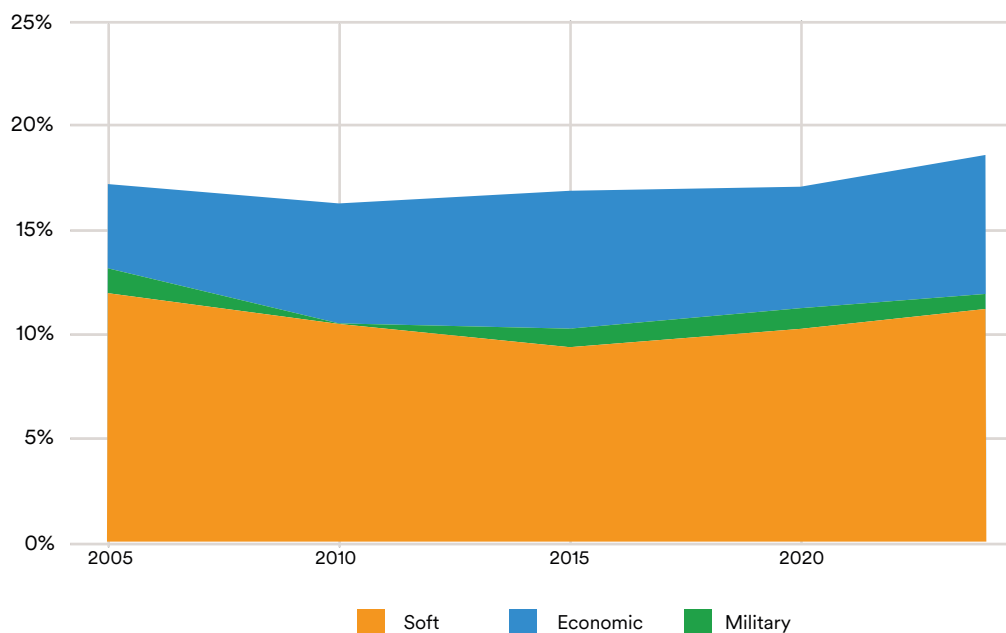
Figure 15.
Evolution of China's global presence in the Middle East, 2005-25, share of total (%)



Source: Elcano Royal Institute.

With regard to the Middle East, China's projection is largely shaped by its military presence (see Figure 15), in particular by military deployment in the Gulf of Aden. When it comes to the soft dimension, the Middle East and Gulf is the region with the weakest soft ties to China. By contrast, China's presence on the African continent (see Figure 16), although smaller in overall volume, has followed a more sustained growth trajectory, driven mainly by the soft dimension, particularly indicators related to climate, science and development cooperation, and to a lesser extent by the economic dimension. In addition, within the continent, China's projection towards Sub-Saharan Africa is more significant than towards North Africa, accounting for 6.7% and 0.7% of its global presence in 2024, respectively.

Figure 16.
Evolution of China's global presence in Africa, 2005-25, share of total (%)



Source: Elcano Royal Institute.

Overall, the reorientation towards the so-called Global South appears far less clear cut when focusing on regions outside China's immediate neighbourhood and is further shaped by specific characteristics that generate differentiated patterns of external projection.

Conclusions

Based on the geographical analysis of China's global presence provided by the Elcano Global Presence Index, several relevant conclusions can be drawn regarding the nature, scope and limits of China's international projection today.

First, the rise of China's international presence over recent decades is indisputable and has been accompanied by a gradual process of geographical diversification. China has consolidated its position as the second power in terms of global presence, significantly narrowing the gap that once separated it from traditional powers. However, this convergence remains incomplete. The gap with both the US and the EU continues to be substantial, and 2024 marks a turning point, as it is the first year in which China's global presence declines both in absolute and relative terms. This introduces an element of uncertainty regarding the future trajectory of its external projection, in an international context characterised by economic fragmentation and geopolitical rivalry.

Secondly, recent developments clearly point to a deliberate risk reduction strategy on the part of China. Beijing is reducing its relative exposure to traditional powers, namely the US, the EU and Japan, precisely where geopolitical frictions have intensified. The loss of relative weight of the US and the EU in China's external projection reflects less an absolute retreat than a more dynamic growth of ties with other regions. Taken together, China's presence in the US and the EU accounts for less than 27% of its global projection, illustrating a gradual diffusion consistent with its objective of limiting external vulnerabilities.

Third, the data confirm that China is, above all, a regional power. More than 30% of its international presence is concentrated in the Asia-Pacific region, a higher proportion than in any other. This regional predominance is consistent with China's priorities in terms of security, development and leadership in its immediate neighbourhood, as well as with the growing regionalisation of value chains. The strengthening of ties with ASEAN and with other Asian countries points towards an increasingly regionalised form of globalisation, in which China seeks to play a central role.

Finally, although official discourse emphasises a reorientation towards the so-called Global South, the shift is far less homogeneous than prevailing narratives suggest. Outside Asia-Pacific, China's projection follows highly differentiated patterns across regions. In this regard, Latin America stands out most clearly, particularly due to the growth of Chinese investment in the region's core economies. Latin America has thus consolidated its position as the second most important region in China's external presence, accounting for 18.5%, more than Africa and the Middle East combined. The expansion contrasts with the more moderate evolution observed in the latter regions and highlights that China's strategy towards the Global South is not uniform, but rather selective and shaped by specific economic, financial and geopolitical interests.

Methodological note

In this exercise on the geographical disaggregation of China's global presence, the general structure of the Elcano Global Presence Index is maintained, with a bilateral, country by country breakdown of each of its constituent indicators. For further details on the overall methodology of the Index, see Olivie & Gracia (2023). In general, the criteria and variables of the Index are preserved, with three qualifications. First, certain variables had to be modified due to limitations in data availability or granularity. Secondly, military presence in the equipment variable has been calculated on the basis of an estimate of Chinese equipment actually deployed abroad, which is evidently not equivalent to the total equipment available to China. Finally, given the geographical and territorial particularities of the People's Republic of China, it was necessary to aggregate data for Hong Kong, Macao and mainland China. While some databases already provide this distinction, in other cases it was necessary to resort to complementary sources or variables in order to obtain information for all three territorial entities.

The variables that have been modified due to data availability or conceptual or methodological considerations are the following. In the case of Sports, given the lack of publicly available data on television audiences for sporting events, a proxy variable was used, namely the percentage of households with a television in each country, drawn from the International Telecommunication Union. For the Information indicator, a proxy was also employed: the percentage of households with Internet access by country, from the same source, combined with the volume of press coverage in each country that mentions China. In the case of the Science indicator, the Elcano Global Presence Index methodology considers the number of articles, notes and reviews published in the fields of Arts and Humanities, Social Sciences and Sciences. To disaggregate this variable externally, the number of publications co-authored with at least one author of another nationality is used.

The Development cooperation indicator is also distinctive in the case of China, a country known for its lack of transparency in the field of development assistance. The AidData database has been used, which provides information on underreported flows of Chinese Official Development Assistance up to 2017. Finally, for the Climate variable, the criterion applied in previous publications has been maintained, using the ND GAIN Climate Vulnerability Index from the University of Notre Dame as the basis for geographical allocation. The logic of this indicator suggests that the more a country suffers from the effects of climate change, the greater the climate presence of other countries within it.

With regard to the disaggregation of military presence, data from the IISS have been used both to measure the troops China has deployed abroad and the equipment employed in each international mission. However, in the general methodology of the Index, the total military equipment available to a country is considered, regardless of whether it is deployed abroad. By contrast, in the exercises of geographical disaggregation, only the specific equipment actually deployed is accounted for, as otherwise the projection would be overstated. As a result, there is a portion of military presence that cannot be geographically disaggregated, namely that corresponding to non-deployed equipment. Consequently, a share of the value of China's global presence remains undistributed, as detailed in Figure 17.

Figure 17.

Percentage of military equipment deployed by China each year and the corresponding value in the global presence index, 2005-24

	2005	2010	2015	2020	2024
Value of deployed military equipment	0.0	487.5	487.5	0.0	650.0
Value of total military equipment	1,212.2	1,594.5	1,639.4	2,268.7	3,832.1
% of non-distributed global presence (%)	24.0%	16.2%	10.7%	17.1%	19.3%

Source: the authors.

Finally, with regard to Hong Kong and Macao, wherever possible China's exports have been calculated as a single entity, by aggregating mainland China with the two territories and subtracting the flows within the three.

Figure 18.

Variables and data sources for the disaggregation of China's global presence

Variable	Indicator	Source
Economic presence		
Energy	Energy product (SITC 3) exports by commercial partner.	UNCTAD
Primary goods	Primary goods (SITC 0 + 1 + 2 + 4 + 68 + 667 + 971) exports by commercial partner.	
Manufactures	Manufactures (SITC 5 + 6 + 7 + 8, excluding 667 & 68) exports by commercial partner.	
Services	Service exports (transport, construction, insurance, financial services, IT, media, intellectual property, personal, cultural and recreational services, & public services by commercial partner.	OCDE
Investments	Outward foreign direct investment stock (not Foreign Securities Holding Company) by country of destination.	UNCTAD (by demand)
Military presence		
Troops	Chinese troops deployed abroad.	IISS
Military equipment	Chinese naval equipment deployed abroad.	
Soft presence		
Migration	Foreign population by nationality and sex.	UN Population Division
Tourism	Arrivals at tourist accommodation, by country of origin.	World Tourism Organisation
Sports	Number of people with television per country.	ITU
Culture	Exports of cultural goods by commercial partner.	UNCTAD
	Exports of cultural services by commercial partner.	OECD
Information	Number of people with access to Internet.	ITU
	Mentions of China in international press (excluding Xinhua).	Factiva
Technology	Income received for intellectual property services by country of origin.	OECD
	Number of foreign-directed Chinese patent requests by country of registering office.	WIPO

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Science	Number of articles, notes and reviews published by a Chinese author in collaboration with a foreign co-author, by country of affiliation.	FECYT, data InCites from WOS.
Education	Number of foreign students in tertiary education by country of origin.	Institute of International Education
Development cooperation	Flows of Official Development Assistance, by country of destination.	AidData
Climate	Notre Dame Climate Vulnerability Index.	Notre Dame University

Source: the authors.

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