

**LLYC  
IDEAS**

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# What are Europeans talking about?

ANALYSING THE PUBLIC CONVERSATION  
AHEAD OF THE EUROPEAN ELECTIONS



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## EXECUTIVE SUMMARY

This report, prepared by LLYC's Deep Learning and European Affairs teams, analyses the digital conversation on the social network X (formerly Twitter) over the last year in **9 Member States** (Spain, France, Germany, Italy, Portugal, Poland, Sweden, the Netherlands and Romania) and **10 languages** on the following six topics of European relevance: **foreign policy and defence, enlargement and neighbourhood, strategic autonomy, rule of law and populism, competitiveness and the fight against climate change.** In total, almost **one million profiles** and **more than 17 million messages** have been analysed.

Ahead of decisive European elections and as the EU faces increasing external challenges, our aim was **to identify which issues are of higher interest for EU citizens and which is the prevailing sentiment towards them.** In addition, the conversation at national level has been compared with that of the "Eurobubble" (the mostly Brussels-based community working and expressing opinions on European issues) in order to identify possible divergences between the two groups.

Despite its limitations (see methodological note at the end), an analysis such as this one allows us **to understand and anticipate in real time citizens' perceptions of the key issues at the core of the EU's strategic agenda and, in the short term, of the imminent electoral debate.** By comparing it with the conversation held by the most active pundits, analysts and politicians in the European ecosystem, it is possible to identify to what extent they are talking about the same thing or actually living in different bubbles - with likely consequences on citizen disaffection and European public opinion. **Ultimately, our aim is to help design public policy interventions that promote a more transparent, effective and productive conversation in the European public debate.**

We set out our main findings below:

## GENERAL

- **The European citizens' conversation is dominated by haters.** In all of the topics analysed, the predominant sentiment among citizens is negative. Sixty per cent of the mentions analysed in the conversations on strategic autonomy and enlargement are negative, a percentage that somewhat decreases for the topics of climate change and competitiveness (around 50 per cent of the total).
- **The Eurobubble is more positive than EU citizens in their conversation on key issues.** Specialist commentators consistently state more positive sentiments in their conversation on key issues. This is particularly noticeable in the case of the fight against climate change and competitiveness. A likely explanation could be that a more informed opinion protects the Eurobubble from purely emotional reactions.

## DEMOCRACY, RULE OF LAW AND MIGRATION

- **Shared concerns about the rise of illiberal populism.** Citizens and Eurobubble show high levels of concern about the rise of authoritarian options. Public conversation on the rule of law is particularly prominent in Poland (32% of the country's total, doubling the European average), highlighting Donald Tusk's role as a pro-European leader able to contain PiS-induced 'democratic deterioration'.

## CLIMATE CHANGE, COMPETITIVENESS AND GREEN DEAL BACKLASH

- **European citizens show little interest in the EU's competitiveness problems.** Despite increased relevance in the specialist conversation, EU citizens still show little interest in this topic. In fact, only 5% of the aggregate digital conversation is related to it. Only German and Spanish citizens seem somewhat more interested in this issue.

- **Citizens do not share experts' optimism on fighting climate change and boosting competitiveness.** In addition to showing less interest, citizens are much more hostile than the Eurobubble in their conversation on these issues. The Eurobubble has an ostensibly positive stance towards the EU's climate leadership, its push for renewable energies and the recent passage of the Net Zero Industry Act.
- **Spanish citizens are more interested in climate change and competitiveness than their European counterparts.** In Spain, the digital conversation on the fight against climate change (8% of the national total compared to a European average of 4%) and competitiveness (7% compared to an average of 4%) stands out significantly.

## FOREIGN POLICY AND ENLARGEMENT

- **Citizens and Eurobubble are particularly interested in the EU's role in the world.** With 40% and 24% of the total digital conversation, foreign policy and defence, and enlargement and neighbourhood, account for a large part of citizens' interest over the past year. This is similar in the Eurobubble, where these conversations account for 37% and 22% of the total respectively.
- **Citizens are sceptical of an autonomous EU in the world.** Citizens are particularly hostile to the EU's management of strategic autonomy, enlargement and neighbourhood policies. While they see a reduction of critical interdependencies as necessary, there is a prevailing concern that an enlarged and more autonomous Union could erode the decision-making capacity of the Member States themselves.
- **Defence and enlargement anger the old Europe.** German, Italian and French citizens show the highest levels of hostility in the social conversation on European key issues - with 56%, 51% and 47% net negative sentiment respectively. Topics such as foreign policy and defence, together with enlargement and neighbourhood, generate the most hostility among these citizens.



## INNOVATION AND DIGITALISATION

- **Citizens and Eurobubble agree on the need to boost digitalisation but disagree on the impact of regulation.** Both groups agree on the need to adopt new digital technologies to boost European competitiveness. However, they disagree in their assessment of certain key regulations such as the Digital Services Act.

## STRATEGIC AUTONOMY AND NATIONAL SOVEREIGNTY

- **Despite being high on the EU agenda, strategic autonomy is not a relevant topic either among EU citizens or in the Eurobubble.** Only France, with 17 percent of its citizens' conversation focused on the topic, stands out from the rest of the member states analysed. It is possible that difficulties in fully grasping such an elusive concept explains the limited interest on the part of European citizens.
- **Citizens and Eurobubble agree on the need to increase EU autonomy but have opposing views on its impact on national sovereignty.** Both groups agree on the need to diversify energy and critical raw material supplies and to accelerate reindustrialisation. However, citizens express their frustration with a possible loss of national sovereignty.



## INTRODUCTION

**Between 6 and 9 June the EU will hold its tenth European Parliament elections.** The elections, taking place in an increasingly unstable geopolitical context, are a new opportunity for European citizens to express their preferences on how the Union should tackle major global challenges. The ability to defend itself, coping with growing migratory pressure or striking a balance between the fight against climate change and the promotion of economic competitiveness are some of the debates that settled in one way or another will decide the future of the bloc in the coming decades.



**Over the years, the democratic character of the EU has become more and more established.** Direct election of MEPs since the 1979 elections, the existence of public consultation processes in the legislative procedures, the progressive increase in Parliament's powers in its work as co-legislator together with the Council or as supervisor of the Commission have made citizens' demands a relevant input in the design of EU public policies. Despite this, certain sectors of the population still perceive the EU as an entity distant **to citizens' feelings**. In the face of much **evidence to the contrary**, accusations of the **democratic deficit** and **technocratic nature** of European institutions have become commonplace.

The EU has undertaken a number of efforts to fight this perception. Actions such as the publication of the [White Paper on the future of Europe](#), the development of the [Conference on the future of Europe](#) between April 2021 and May 2022, the addition of many of the citizens' demands arising from this Conference into the Commission's work programme for 2023 and the presentation of the [Social Dialogue Package](#) in January of the same year all respond to this objective of making the citizens' voice one of the real driving forces behind European action.



**The ongoing data revolution presents risks but also opportunities to strengthen the relationship between citizens and institutions.** On the risks side, the rise of disinformation on social networks and the misuse of AI accentuates the radicalisation of positions in the public debate - emptying the public conversation of compromise positions underpinning truly resilient public policies. According to the latest [Eurobarometer on democracy](#), 40% of Europeans consider “false and/or misleading information circulating both online and offline” as the main threat to democracy. Moreover, the very dynamics of social media, often mere echo chambers, intensify divergences within the public debate and accentuate citizen disaffection. **Social media and digital technologies threaten to widen the gap both between citizens themselves (horizontal polarisation) and between citizens on the one hand and experts and decision-makers on the other (vertical polarisation).**

**But these new technologies also offer previously unthinkable possibilities.** In this study by our Deep Learning and European Affairs teams, we have analysed the digital conversation of millions of European citizens in nine Member States to identify their concerns in the current European context - on the eve of decisive European elections and with external threats becoming increasingly worrying. Such an analysis allows us to understand and anticipate in real time citizens’ perceptions on key issues. By comparing it with the conversation among the most active pundits, analysts and politicians in the European ecosystem, we can identify to what extent they are talking about the same thing or are actually living in different “bubbles”. **Ultimately, our aim is to help design public policy interventions that promote a more transparent, effective and productive conversation in the European public debate.**

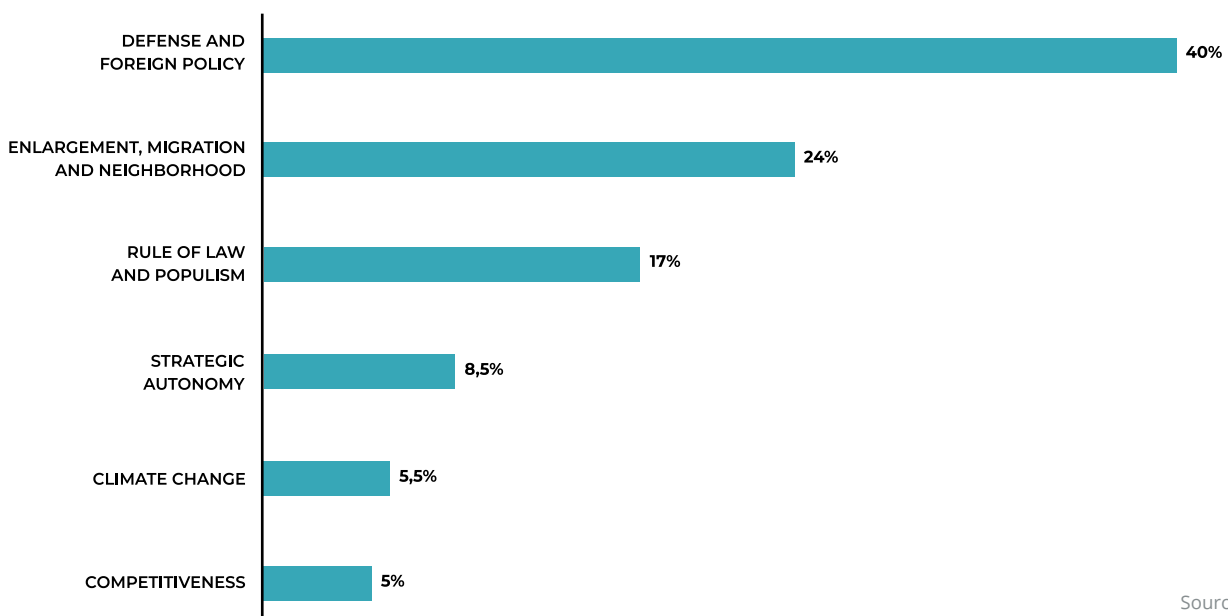
**At LLYC, we firmly believe in the positive power of technology to facilitate communication, increase trust and drive profound social change.** We believe that it is possible to use social media, data analytics and new AI tools to enhance ways for citizens to communicate and participate in the conversations that affect them most. And the European project, especially at this uncertain moment in history, is one of them. **We hope you find our research both interesting and useful.**

## WHAT ARE EUROPEANS TALKING ABOUT?

A preliminary analysis of the aggregate conversation across Member States suggests that an interest in the external dimension of the EU is a leading trend.

As the figure below shows, defence and foreign policy (with nearly half of all mentions identified) and enlargement and neighbourhood (with one in four) stand out very significantly as the most relevant topics of conversation. **With the ongoing Russian aggression over Ukraine as well as the start of Ukraine's and Moldova's EU accession processes, European citizens are increasingly interested in how the EU is dealing with these external challenges.**

Relative weight of each issue in the aggregate digital conversation (% of mentions out of total)



Source: LLYC.

The general conclusion hardly changes if we go down to the national level (see table below). Although the relative weight shows variations by country, these two conversations (defence and enlargement) continue to concentrate the attention of citizens in all the analysed Member States.

**The citizens of France and Poland exhibit the most distinctive conversation.** With Macron's emphasis on strengthening European sovereignty since his famous speech at La Sorbonne in 2017, it is no coincidence that French citizens talk the most about strategic autonomy.

Similarly, Poland, in the midst of an internal transition from the quasi-authoritarian regime of Law and Justice (PiS) to the new, more pro-European leadership of Donald Tusk, is remarkable for exhibiting a heightened interest in the rule of law and populism.

**The Spanish case also presents its own particularities.** Although defence, foreign policy and neighbourhood are also the topics that dominate there, their relative weight is lower than in other Member States. **Accordingly, it is also Spanish citizens who care the most about the fight against climate change and the promotion of competitiveness.**



**Relative weight of each issue in the digital conversation by Member State**  
(% of mentions out of total)

	ENLARGEMENT & NEIGHBORHOOD	STRATEGIC AUTONOMY	CLIMATE CHANGE	COMPETITIVENESS	DEFENCE AND FOREIGN POLICY	RULE OF LAW AND POPULISM
GERMANY	29%	4%	4%	6%	40%	17%
SPAIN	19%	5%	8%	7%	43%	19%
FRANCE	24%	17%	6%	4%	36%	13%
ITALY	27%	5%	4%	4%	45%	14%
NETHERLANDS	32%	4%	6%	3%	40%	15%
POLAND	17%	2%	2%	2%	44%	32%
PORTUGAL	26%	5%	4%	5%	48%	13%
ROMANIA	31%	4%	2%	4%	47%	12%
SWEDEN	28%	7%	3%	3%	47%	12%

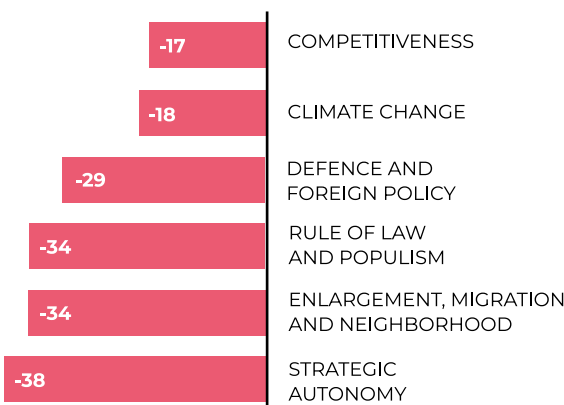


Source: LLYC.

In light of these data, it is clear that public conversation over the past year has focused on the EU's external dimension to the detriment of other issues such as competitiveness or the defence of the rule of law, which are seen as of a more internal nature. This is perhaps natural in a scenario in which threats from abroad have come to occupy a relevance hitherto unknown to the vast majority of EU citizens.

In line with previous studies, an analysis of the prevailing sentiment clearly shows that online conversation is dominated by a negative tone (see figure below). **In Europe, as elsewhere, the social conversation is ruled by haters.**

**Predominant sentiment in each territory at the aggregate level**  
(below zero predominantly negative, above zero predominantly positive)



Source: LLYC.

Topics where hostility is most evident are those focusing on strategic autonomy, enlargement and neighbourhood. **European citizens display their scepticism, if not outright hostility, towards a Union aiming to better defend itself against external threats.**

With regard to strategic autonomy, criticism of the **EU's dependence on critical technologies and raw materials** stands out, as does the fear that a push for European sovereignty could end up eroding **Member States' own decision-making capacity**. The French case is particularly representative of this hostile position, with much of the citizen conversation being sceptical of its own President's push for greater European sovereignty.

Regarding enlargement, citizens are sceptical about the **EU's ability to integrate new member states** that, like Ukraine, Moldova or Georgia, diverge significantly from the European average. A nationalist stance, concerned about how enlargement could impact on the position of current Member States, is also abundant in this conversation.

In any case, the intensity of hostility varies significantly by Member State. The following table allows us to qualify the general conclusions. Analysis at the country level suggests that some citizens within the EU are particularly hostile: this is the case for German, Italian and French citizens. **Old Europe is particularly angry with the EU.**

### Predominant sentiment in each issue per Member State

(below zero sentiment is predominantly negative, above zero predominantly positive).

	ENLARGEMENT & NEIGHBORHOOD	STRATEGIC AUTONOMY	CLIMATE CHANGE	COMPETITIVENESS	DEFENCE AND FOREIGN POLICY	RULE OF LAW AND POPULISM
GERMANY	-63	-54	-65	-57	-48	-51
SPAIN	-66	-57	40	26	-46	-54
FRANCE	-59	-34	-54	-45	-55	-45
ITALY	-38	-57	-41	-40	-52	-76
NETHERLANDS	9	-28	-8	-30	8	-15
POLAND	-43	-45	-40	-20	-8	-11
PORTUGAL	-38	-2	-8	26	-33	-29
ROMANIA	20	-21	18	11	0	1
SWEDEN	-31	-41	3	-33	-30	-27



Fuente: LLYC.

Indeed, a glance at the specific conversation topics reinforces this perception. Topics such as foreign policy and defence enlargement and neighbourhood policy are generating the most hostility in the core of the Union's founding members.

Although the analysis does not allow us to delve much deeper, it is possible to suggest two alternative hypotheses. On the one hand, within a context of significant changes in the distribution of European power (growing political influence of the

Eastern partners, foreseeable cuts in Common Agricultural Policy funds and cohesion in the face of future enlargement), it seems logical to think that it is precisely the citizens of these Member States who most question what they perceive as a loss of privileges. Alternatively, their evident anger might be more related to their frustration at the EU's inability to successfully promote both its own common defence and effective support for future eastern partners.

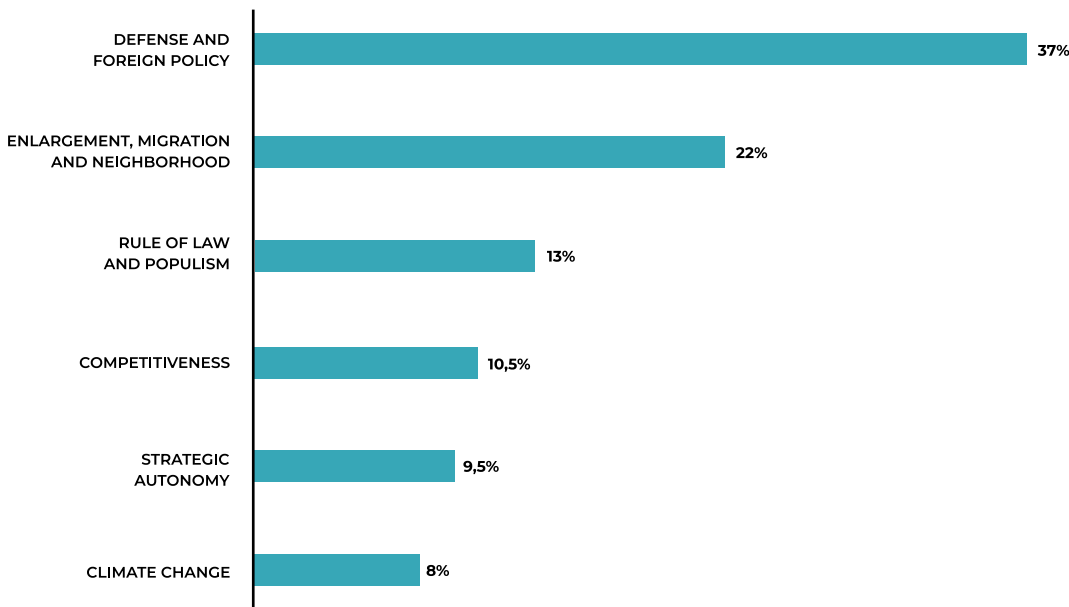
## WHAT IS THE EUROBUBBLE TALKING ABOUT?

Despite the indisputably democratic nature of the EU, it is clear that a set of usually highly qualified opinion leaders exercise a particular ascendancy over both the rest of the conversation and the adoption of certain public policy decisions.

This set of analysts, pundits, lobbyists, journalists, EU officials and political leaders is what is traditionally referred to as the Eurobubble. A detailed analysis of the digital conversation in this collective provides additional insights.

Our first finding is that the topics of conversation of most interest in the Eurobubble are the same as for EU citizens in general: foreign and defence policy (about one in three mentions), and enlargement and neighbourhood (about one in five). The graph below shows the relative weight of each topic in the Eurobubble.

Relative weight of each issue in the Eurobubble conversation (% of mentions out of total)



Source: LLYC.

**The divergence between citizenship and Eurobubble, if it exists at all, is not therefore visible in the topics of conversation.** They all talk about the same stuff. Only when it comes to competitiveness is there a significant difference between the two groups, with the Eurobubble being more interested in this issue.

**The main difference lies more in the feelings with which the two groups approach the issues.** In general, the Eurobubble exhibits significantly lower levels of hostility than EU citizens. Given the educational and professional profile of its members, it is plausible to think that a more informed opinion protects the Eurobubble from hostile reactions whereas citizens find more motives for frustration and anger.

**This is particularly noticeable in the conversation about climate change and competitiveness.**

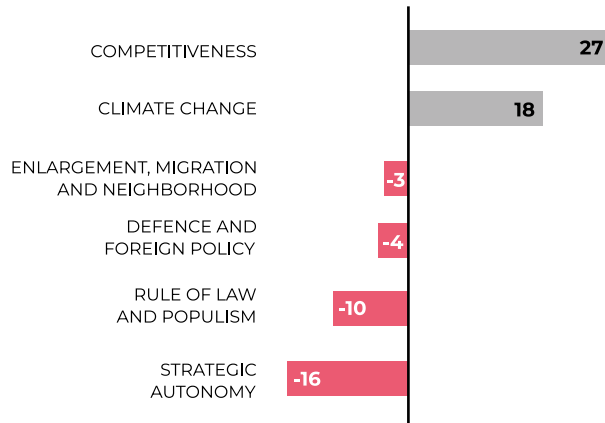
Despite being comparatively less relevant issues, the Eurobubble is much more positive about them than EU citizens. In the case of climate change, for the Eurobubble the EU's climate leadership, its push for renewable energy or the recent approval of the Net Zero Industry Act compensate for the criticism associated with the use of chemical pesticides or the resistance to the green transition shown by certain sectors such as the German automotive industry.



Similarly, the hostility with which citizens perceive the EU's attempts to gain a greater capacity for external action is greatly diminished when we look at the Eurobubble's reactions.

In the case of foreign policy, and in contrast to the negative view that prevails among citizens, the positive perception of financial support for Ukraine or the Atalanta operation in the Red Sea counterbalances criticism of the internal division in the imposition of sanctions on Russia and support for Ukraine.

### SNPs by topic (messages)



Source: LLYC.



## CONCLUDING REMARKS

Beyond specific data on relevance, feelings and arguments associated with certain European key issues, a comparative analysis of the conversations in the Eurobubble and in Member States sheds additional light on the functioning of social networks as spaces for the formation and consolidation of European public opinion. While relevant in themselves, these insights are of particular interest in a context of increasing disinformation and foreign interference in public debates and elections.

**At LLYC we believe in the power of technology to foster a more transparent and informed public conversation.** We hope that the findings below may be used by decision-makers to design communication actions promoting an inclusive, transparent and evidence-based debate in a context that is increasingly hostile to it.

- 1. Haters rule.** The relevance of a topic on social media is often associated with the prevalence of negative sentiments. This study shows that this is also the case in the EU conversation. These are the rules of the game. A deeper understanding of the inherent dynamics of social media will facilitate the design of more pragmatic and effective communications actions.
- 2. There is no European public opinion, but national public opinions.** Despite the convergence identified between Member States in terms of issues and even arguments, diversity of national approaches is still paramount.

This makes it advisable to design communications actions sufficiently adapted to the debate in each Member State.

- 3. Conversations do not take place in a vacuum:** communities and opinion leaders matter. As in any other public debate, more or less organised interests mobilise social media on the basis of specific strategies and arguments. Technology makes it already possible to precisely identify the most relevant communities and profiles. These capacities can and should be exploited by public authorities to defend a democratic, transparent and truthful debate by neutralising or promoting relevant actors.
- 4. Pedagogy matters.** If anything, the comparison between the citizen conversation and the Eurobubble shows that the latter is systematically less hostile in its treatment of issues. It is plausible to think that a more informed opinion protects it against the emotional reactions inherent in social networks. A (micro) segmented provision of relevant information by public authorities could act as an effective prophylaxis against the emotional strategies at the core of disinformation actions.
- 5. Digital early warning.** Technology offers the possibility to follow the development of public debate in real time, to identify emerging issues and to anticipate their impact. Public authorities committed to protecting against disinformation can and should design digital monitoring systems that enable early intervention in the event of obvious interference in public debate.



## ANNEX. METHODOLOGICAL NOTE

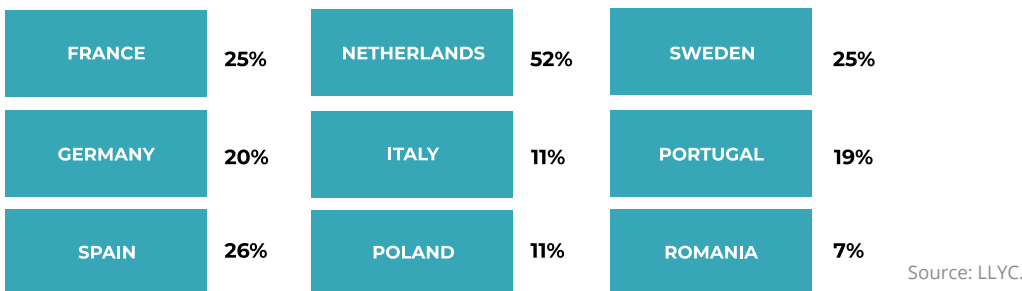
This report (an extended version is available upon request) presents the main findings identified in the analysis of **6 relevant EU topics in the social network X: foreign policy and defence, enlargement and neighbourhood policy, strategic autonomy, populism and the rule of law, competitiveness and climate change.**

The **main objective** of the report is to identify and quantify similarities/divergences in

how the two target groups (citizens vs. Eurobubble) talk about these issues.

The main limitation of this study is associated with the representativeness of the sample studied. The scope of analysis (digital conversation in X) makes it impossible to draw conclusions about the whole European population. The selection of Member States does not follow strict statistical sampling criteria either, despite the fact that one third of the European population is actually covered by the analysis. Although the use of relative magnitudes partially mitigates the problem, it is important to note that the volume of messages per country is partly influenced by the penetration share of X in each country (the higher the penetration, the higher the volume of messages).

### Percentage of national population using X



The dimensions analysed in aggregate and for each theme and Member State were as follows:

- **Relevance/Awareness** measures the interest aroused by each topic in the digital conversation through the percentage that mentions it represents out of the total conversation.
- **Sentiment (sNPS)** measures the positive, negative or neutral perception that an issue exhibits in the social conversation through the difference between the percentage of favourable messages about it minus the percentage of hostile messages.
- **Specific arguments (like-minded or detractors).** For the relevant issues, a representative sample of the messages related to them with the greatest reach and impact, both positive and negative, is selected and the common narratives are identified.

The report includes two distinct parts:

- The analysis of the social conversation in **nine Member States** (Spain, France, Germany, Italy, Portugal, Poland, Sweden, the Netherlands and Romania) on both an individual and aggregated basis, and
- the analysis of messages published by a **selection of analysts, experts, decision-makers and public and opinion leaders on European issues ("Eurobubble")**.

The **nine Member States** have been selected in order to obtain a wide sample of both the EU population (most populated Member States such as Germany, France, Spain, Italy and Poland) and the most visible regional sentiments and cleavages within the EU (mainly north-south and east-west axes).



The **definition of the “Eurobubble”** is based on the preliminary identification of **182 active profiles** considered to be opinion leaders on European issues on the **social network X** (list available upon request). This includes analysts, experts, lobbyists and journalists, but also European and national politicians and civil servants. Based on the relationships between profiles revealed during the social conversation itself and applying SNA (Social Network Analysis), clustering and artificial intelligence techniques, different **communities of conversation** have been identified.

Finally, the top 12 most active key opinion leaders (KOLs) in the globality of territories have been selected and their favorability or hostility with respect to the different topics analysed has been identified.

Based on a set of identified **keywords** (see table below), a global query has been defined for each of the themes and an exhaustive translation has been carried out in 10 languages (Spanish, English, German, French, Italian, Dutch, Polish, Swedish, Romanian and Portuguese)

## Issues analyzed and associated keywords

ENLARGEMENT, MIGRATION AND NEIGHBORHOOD	STRATEGIC AUTONOMY	CLIMATE CHANGE	COMPETITIVENESS	DEFENCE AND FOREIGN POLICY	RULE OF LAW AND POPULISM
<p><b>4M impacts</b></p> <p>Neighbourhood and Enlargement processes in detail, including migration and asylum policies, accession negotiations, and stabilisation and association agreement as part of EU Common Foreign and Security Policy.</p>	<p><b>1,5M impacts</b></p> <p>Policies aiming to strengthen EU's strategic autonomy, reducing the EU's dependence on others, international trade and focusing on industrial policies regarding critical materials, diversifying energy supplies, reinforcing the supply chain for a common industrialisation process.</p>	<p><b>937K impacts</b></p> <p>EU efforts, actions and consequences fighting climate change, including circular economy, energy efficiency, Common Agricultural Policy, EEE Waste and decarbonisation;</p>	<p><b>832K impacts</b></p> <p>EU measures aiming to strengthen its competitive economy with a sustainable productivity rate and drive growth; strategies and policies for a digital future, and the Multiannual financial framework for 2021-2027.</p>	<p><b>6,9M impacts</b></p> <p>EU cooperation on security and defence, geostrategy, response to current critical events around the world, armed conflicts and warfare, including sanctions and restrictive measures.</p>	<p><b>2,8M impacts</b></p> <p>EU measures to defend human rights, European Rule of law, the rising of populism in times of misinformation and fake news.</p>

Source: LLYC.



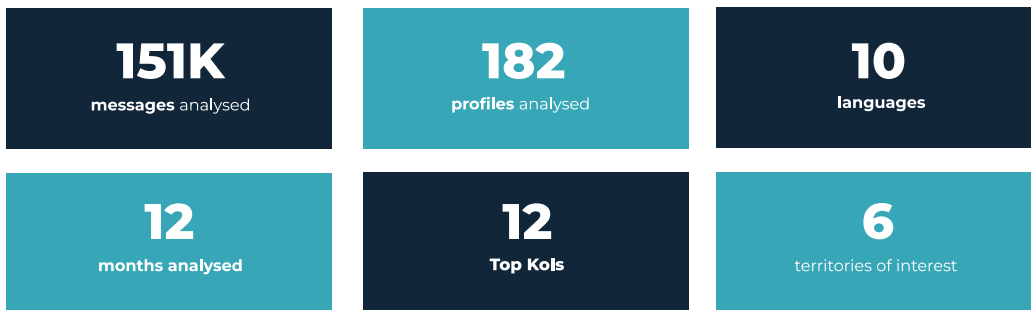
This has been used to obtain the totality of the social impacts on the issues identified in the nine countries. These same queries were used to segment the conversation generated by Eurobubble profiles. The following figures summarise the **main figures of the analysis**:

### Member State Conversation Analysis Factsheet



Source: LLYC.

### Eurobubble Conversation Analysis Factsheet



Source: LLYC.

In order to extract arguments related to or detracting from the EU in each of the topics of conversation and, with the aim of maximising representativeness, a sample of messages was selected by scope and type of post (original posts). Machine Learning and AI techniques were used to obtain the different KPIs and topics.

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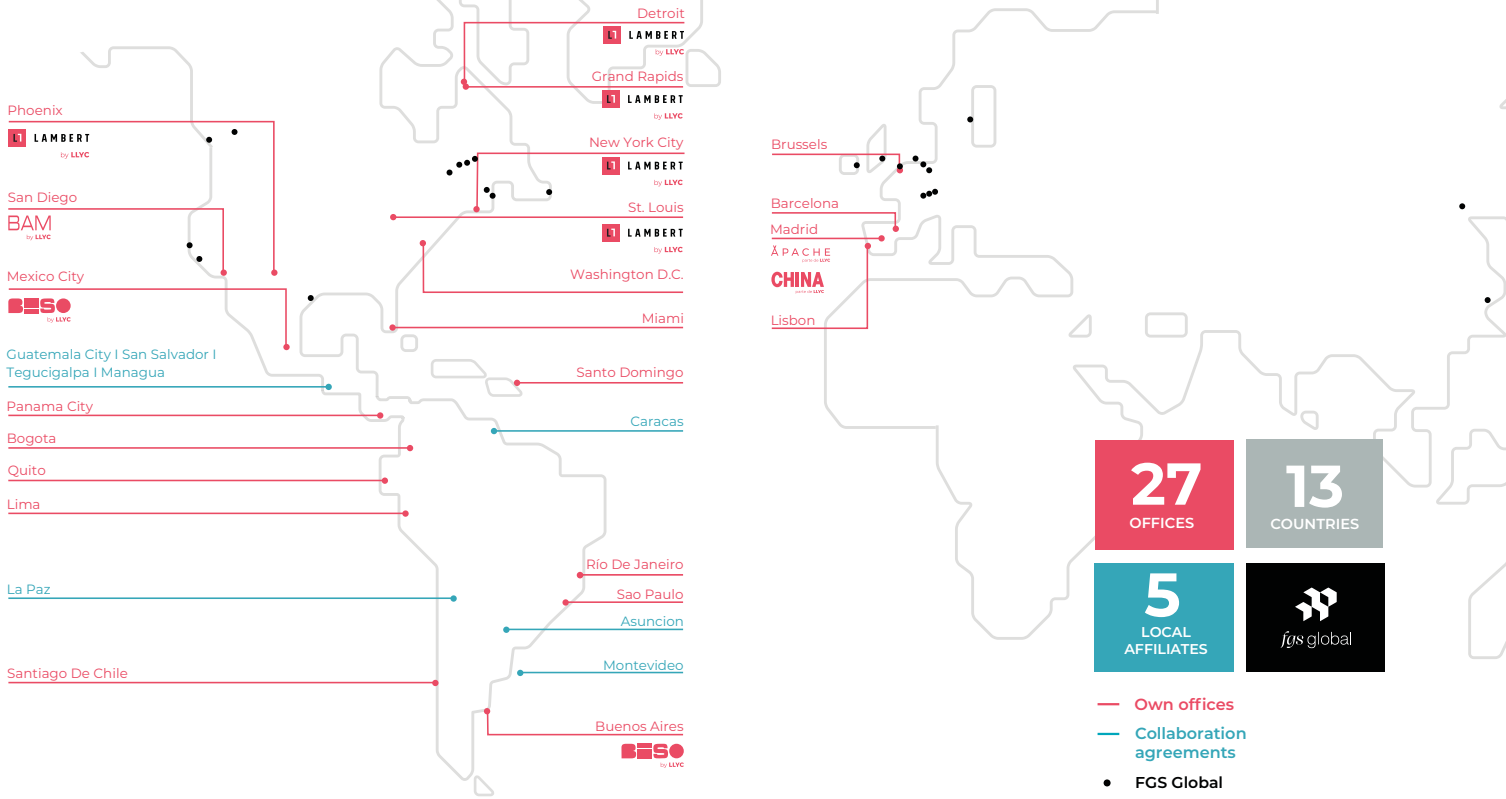
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# LLYC

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- Own offices
- Collaboration agreements
- FGS Global

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MARCH, 2024

**LLORENTE Y CUENCA**