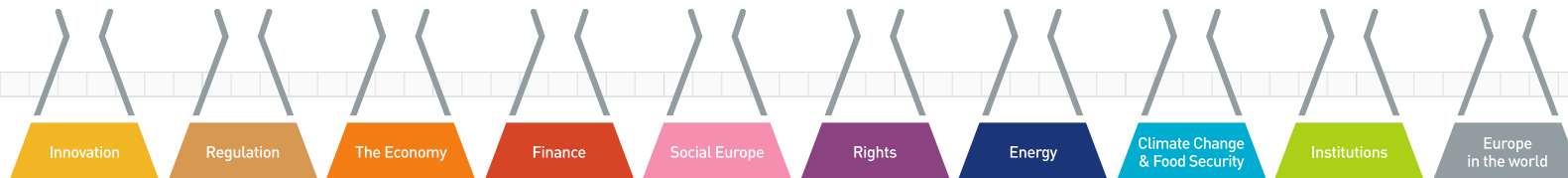


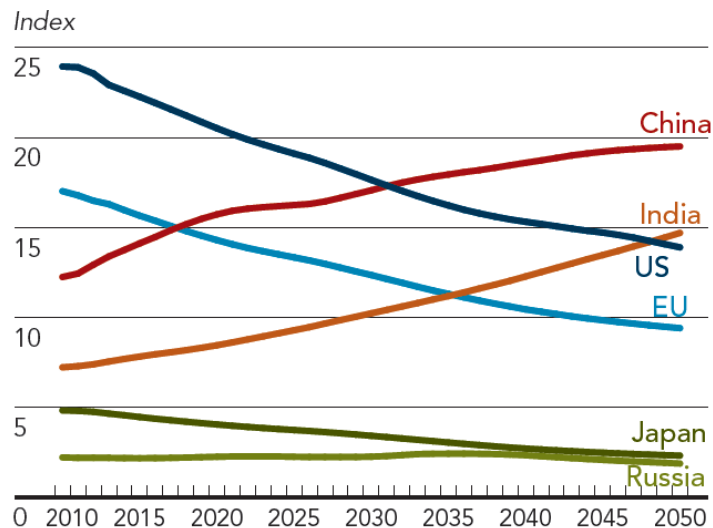
Empowering Europe's Future: Governance, Power and Options for the EU in a Changing World

Giovanni Grevi - FRIDE



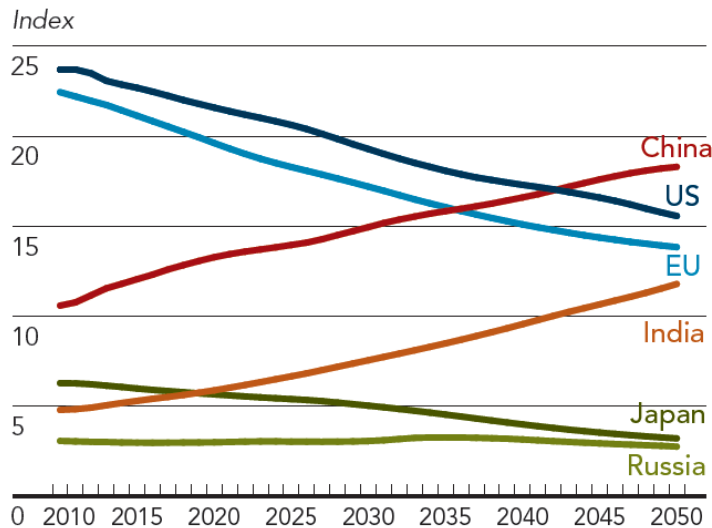
A NEW POWER MAP

Traditional, Four-Component Power Forecast



Source: Global Power Index, National Intelligence Council 2012

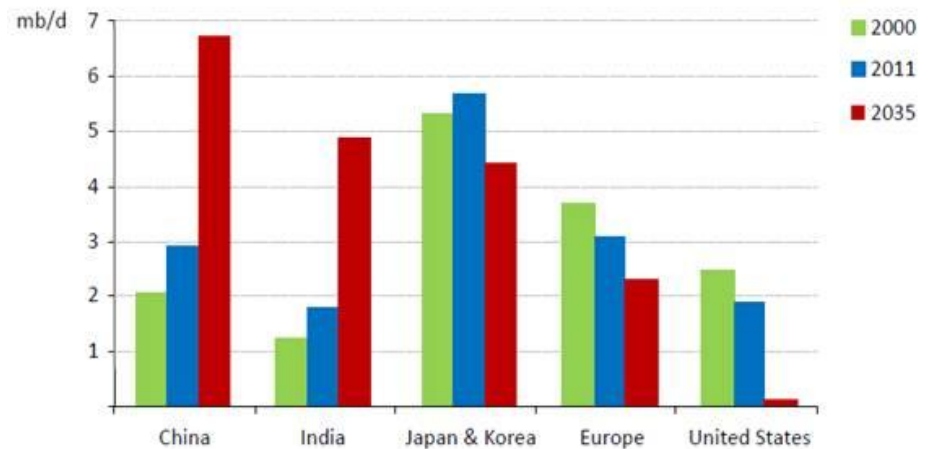
New Multi-Component Global Power Index Forecast



THE WORLD IN 2030 : KEY MESSAGES

- Deepening but vulnerable interdependence
- Resource insecurity: concentration and price volatility
- Disconnect: growing competition and faltering cooperation

MIDDLE EAST OIL EXPORTS BY DESTINATION

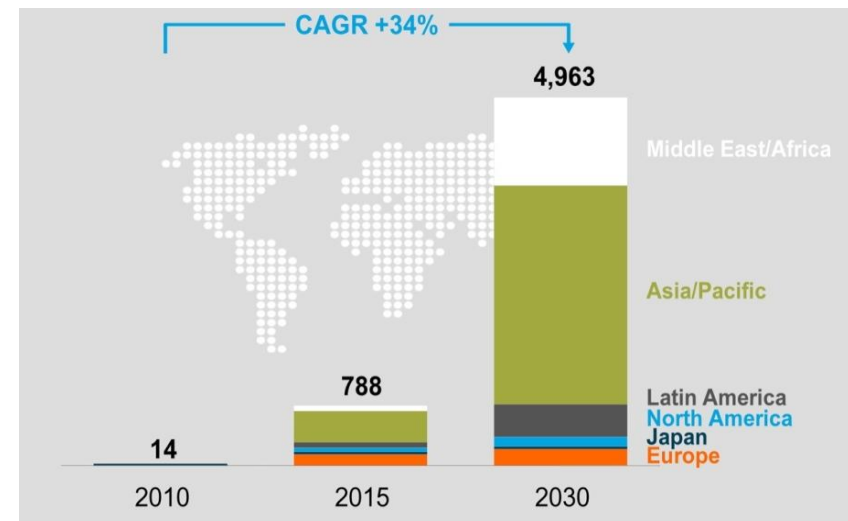


Source: International Energy Agency, 2012

CONSTRAINED POWER AND FRAGILE POWERS

- A new context: Power shifts and power skills
- Domestic fragility and risk of introverted powers
- Potential key role for middle-powers

NUMBER OF MOBILE-ONLY BROADBAND USERS



Source: Roland Berger, 2012