



Wilton Park



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Conference report

**Future trends and challenges for the Middle East
and North Africa: towards 2030**

Wednesday 18 – Friday 20 January 2012 | WP1138



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Key questions

1. The term “Arab Spring” has become a convenient journalistic shorthand for the events unfolding in the Middle East and North Africa (MENA), but it is a misleading and inaccurate term. They are better characterised as a series of “Arab uprisings”, or a 21st century “Arab awakening”. However, this is of a very different nature to the “awakening” that took place 100 years ago, which was of a more secularising nature.
2. The changes in the Middle East and North Africa could be seen as part of a broader “global political awakening” (to use the political scientist, Zbigniew Brzezinski’s expression), including protestors in New York and London, along with other *indignados*. Are the Arab uprisings the early indicators of change of a global dimension, with wider impact on the course of world politics?
3. The voicing of deep senses of identity that have been repressed for years, may take global actors in directions for which they are unprepared. Translating popular will into effective economic and political action will be a critical challenge, raising new questions. What does this mean for the monarchies? If Islamists come to power across the region, what will happen in Morocco, Tunisia, Syria, Yemen?
4. Looking ahead 20 years: what form of governance will emerge in the region? The nature of power is changing. Repression is no longer accepted by populations amidst a rising demand for legitimacy. Change is germinating throughout society. People are better educated, better connected, and more aware of the wealth of elites. The wall of tyranny is being challenged and demolished in states such as Tunisia, Morocco and Libya.
5. In 100 years from now, will the “Arab Spring” warrant a semester on an undergraduate history course? Or will it merely feature as an example of a broader diffusion of power in the early 21st century? Will historians write of 2011 as a defining date in world developments? To give a historical context, Hosni Mubarak held power as the third longest Egyptian leader, after the ancient Ramses II, and Mohamed Ali in the 19th century. In spite of this longevity, Mubarak was toppled in 10 days.
6. Most of the events of 2011 were driven by “local actors” rather than by external players. What does this mean for the West? Does it signal an end to the “golden age” of western dominance? From now on, ownership of “international norms” will be more diffuse. For example, there has been a shift in the normative power of the European Union (EU), particularly through its faltering relations with Turkey.

“ Translating popular will into effective economic and political action will be a critical challenge, raising new questions.”

“ Will historians write of 2011 as a defining date in world developments?”

7. The core issues can be navigated through a 3 way lens:
 - On the *domestic* level: transition, a non-linear process, civil-military tensions and the emergence of new social groupings
 - On the *regional* level: competition, the Arab-Israeli conflict, change in Syria and Iraq as influenced by regional competition between Saudi Arabia and Iran
 - On the *international* level: the plethora of policies of outside powers, some of which have a negative effect
8. The scope of enquiry into the long term future of MENA could be framed by seven “entry points”.
 - Will there be new models for legitimate Islamic democracy?
 - How economically viable will Arab states become?
 - Nuclearisation
 - Multilateral and mini-lateral regionalism in the Middle East
 - New roles of China and of the US
 - The role of three non Arab regional powers: Israel, Turkey and Iran
 - Oil, natural gas, energy technology and the technology “X factor”

Opportunities and challenges

9. A failure to engage with Arab countries during this transition would represent a failure, not of information, but of imagination. Constitutional and institutional reform could be supported through the active promotion of the politics of consensus, linked to more open and participatory mechanisms of governance. The Gulf States have an important role to play, which could be bolstered in the future by Egypt. Civil society organisations will continue to proliferate in the Middle East.
10. However, polling shows that the majority of the Arab population do not want political aid or support for civil society from the West. For example, there are strong indicators that Egyptians are uncomfortable with the current high levels of financial support from western countries. This raises important questions about independence and perception: can an Arab regime benefit from western support and still be considered legitimate?
11. Paradoxically, one of the hardest challenges lies in the opportunities afforded by the seismic changes in the region. Expectations are high and populations have invested much hope in a better future. Can governments deliver on these expectations? Will the necessary institutions be put in place? What happens if hope turns to despair?
12. The ability of states to function effectively is linked to overall financial stability and it is evident that the economic cost of the Arab uprisings will be high for both oil-producing and oil-importing countries.
13. Is long-term chaos ahead? There is a risk that the impact of multiple players and the absence of a mechanism for conflict management or resolution, may result in a “balance of weakness”. The Gulf may become a region of future conflict.
14. There may emerge a “fight for freedom” beyond the ballot box. Elections could surface people who don’t believe in the democratic process resulting in a battle for tolerance, diversity and equality.
15. Above all, there is great need for patience, optimism and creativity. Leaders should be state-builders not iconic figures. Through business and education, civil society, entrepreneurship, investment and training, particularly of young people, the path can be prepared for ordinary people to change the Middle East. It will take time and the events of 2011 are just the first chapter in the book of the Arab uprisings.

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“ There may emerge a “fight for freedom” beyond the ballot box.”

Accountability and rights

16. Legitimacy, rather than regional stability, is emerging as the main driver of change. People and their individual concerns are now at the core and this has led to an increased optimism about the ability to engender societal change. There is a realisation that individuals have the power to force governments to meet the needs of citizens. There is hope that this new balance of power may endure.
17. The emerging debate about rights is a major focus for many states, with differing impacts in e.g. Egypt, Libya and Syria. All actors are struggling to articulate *whose* rights: citizens, women, youth, minorities. This debate extends beyond the state-citizen relationship to encompass citizen-citizen. Ideally, the state will recognize the identity of its citizens, and citizens will respect one another.
18. The challenges are manifold. Would it be acceptable for different states to have different levels of accountability and what would be the implications? Actors could claim that they should be supported in order to prevent the outbreak of further uncertainty and chaos. This argument could result in the reinvention of dictatorial and/or military regimes in order to curtail newfound freedoms.

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Economy

19. Economic drivers are critical and there are high expectations in the context of job prospects and large-scale youth unemployment. At the same time, there is a problem of capacity: Egypt is experiencing difficulties in finding people with the right skills set.
20. History shows that economic transition will be gradual and World Development Reports indicate the importance of managing expectations towards longer-term goals of 10-20 years. In the short term, stabilisation should be the primary goal: the changes in Egypt have left the country in a weak economic position, with the attendant risks.
21. Projections show that by 2030, 106 million people aged 20-29 will be entering the workforce compared to the current figure of 96 million. Employment is dependent on a strong economy. From 2030, an increasingly ageing population will lead to a high dependency ratio and rising healthcare costs. By 2045 the “demographic dividend” will have vanished. A more open citizenship process could lead to increased movement between countries with migration acting as a boost to economies.
22. Action on price distortions, an improvement in property rights and the rule of law could all serve to create employment, alongside a package of measures to open up economies to trade and investment. This could herald the end of a “cultural exceptionalism”, and showcase Arab countries as rational economic actors when the incentives are right. However, the financial and economic crisis in Europe and elsewhere make it a difficult time to promote liberal reform.
23. There is a view that liberalisation has been tried and failed; others argue that it was never given a chance to succeed. Overall, there is a wealth of information on economic reform- what works and what doesn't -and this could be further exploited. The European Bank for Reconstruction and Development (EBRD), which has experience of fostering transition to market economies in central and eastern Europe, is now engaged in the MENA region. The International Monetary Fund (IMF) and other international financial institutions could also play a positive role. At this stage, the role of sovereign wealth funds is unclear.
24. It is difficult to change a subsidy culture, as Nigeria has found recently. Typically, there is a high dependency on the rent economy, with a significant percentage of people relying on unprotected, poorly paid, informal jobs. The rent-seeking model limits entrepreneurship to the well-connected- generally characterised as a prosperous minority attached to the regime. This is not solely an issue for the poorer countries: Saudi Arabia is perceived as undermining the private sector and entrepreneurship by subsidising the public sector in order to buy off discontent.

“ History shows that economic transition will be gradual ”

“ There is a pressing need for a new social contract with schemes that target the needy and marginalised.”

25. Some Islamists in Egypt refer to the return of Nasserite protectionism, but in practice there is likely to be compromise between these views and pro-market reforms.
26. Can the Gulf countries and Algeria break their dependency on oil exports (90% of revenues)? Will other Arab countries be able to move up the value chain from low skilled, low value-added and “low-tech” activities?
27. There is much speculation over the region’s prospects for economic integration. Eighty per cent of Tunisia’s trade is with the EU, and two-thirds of Morocco’s. By comparison, only 3% of trade is intra-Maghreb.
28. Apart from oil, tourism and real estate, foreign direct investment (FDI) is low and there is limited knowledge transfer into the region. However, there *are* opportunities for international actors, providing that they focus on the trend rather than the “noise”. Even in the short term, political stability would have a significant impact on tourism and FDI.
29. The growth model should be inclusive, equitable, and with greater focus on social justice. However, the fiscal space is limited. In the past, social policies have been distorted in order to sustain regimes. There is a pressing need for a new social contract with schemes that target the needy and marginalised.
30. The region is one of the largest importers of food, and the largest importer of cereals – a key factor behind the Arab uprisings. Food security needs to be improved: the region imports twice as much food as it exports and anomalies should be addressed. At times produce, such as potatoes, are exported by one country to Europe, and imported by another from Europe (the “potato paradox”).
31. The public education system needs investment and improvement, arguably a higher priority than attracting international educational institutions to the region. Use of technology lags behind other parts of the world and public sector delivery across the region is challenged. Many countries have had limited experience of open governance and lack the institutions to implement.
32. There are opportunities for the international donor community to assist by mobilising private sector funding, regional financial markets, and other enabling reform. Economic failure could well trigger further upheaval and provide the excuse for more military actors to step in as the strong arm of government.

Iran

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33. Iran is relatively isolated in the global community; Iranian citizens are systematically subjected to human rights abuses; oil revenues have been wasted; and the country’s nuclear ambitions are of growing concern. In spite of this, Iran has considerable potential and there is speculation that the country could open up over time. There are some democratic components and, arguably, this includes a freer media than that of countries such as Singapore.
34. The prospect of a Tahrir Square in Iran has been the subject of much conjecture, but this seems unlikely whilst the Republican Guard continues to support the regime. Events in recent years, illustrate that the Iranian government has the power to repress civil unrest on the streets and it is unclear to what extent its citizens currently have the will to challenge the regime. The demonstrations in 2009 were a powerful indicator of the desire for change.
35. The regime has exercised control using fear and brute force. However, whilst still enjoying support from some quarters, Iran now faces its most severe test, both internal and external.
36. Iran is not a secular state, but neither is it fully defined by religion. Traditional Islam is now on the defensive, the tenets of the religion challenged by the events of recent years. People have faith, but this does not mean that Iran’s actions are legitimised by Islam.

37. Thought leaders should be drawing up a roadmap for the future, recognising that some of Iran's values correspond to universal values, otherwise, there is a real risk that the country could fall prey to anarchy. The Green Revolution offers a different model of decision-making. The recent Arab uprisings illustrate the potency of civil societies with a co-ordinated action plan, supported by effective networking and communications.
38. There are potentially 3 scenarios to frame the outlook for Iran over the next 20 years: new forms of sectarianism; anarchy, spreading across the region into south Asia; and pluralism, promoting economic development and embracing civil rights.

Israel and the Middle East peace process (MEPP)

39. How will the Arab uprisings impact the MEPP in the longer term? This may be an opportunity for Israel to redefine its relationship with the region. Although Israel may prefer to see the MEPP as a distinct issue, it may not have the long range of 20 years to settle the conflict and may therefore face unappealing choices.
40. Following the Arab uprisings, it can no longer be said that the peace process is the main obstacle to progress in the region. However, both Palestine and Israel continue to cite the complexities of demographics and an unstable environment. It is difficult to determine if this is a realistic time to advance discussion.
41. The past 30 years, have seen greater engagement of Egypt, Jordan and much of the Arab world with the state of Israel. Ahmadinejad's rhetoric in 2005 represented a counter-trend targeting the elimination of Israel. Which trend will prevail?
42. How will the new forces in the Arab world impact on the 1979 Egypt-Israel Peace Treaty? If the treaty is reduced to little more than an armistice agreement, there is a risk that tensions could be re-ignited triggering further conflict.
43. Recent events have reframed the Arab-Israeli relationship so that it will no longer be defined solely in terms of the Palestine-Israel conflict. The region has redefined itself and raised its profile, with Egypt now instated as the centre for new ideas in the Arab world.
44. The Government of Israel will need to work with a broad range of actors in the region, both directly and through multilateral institutions, for example, supporting efforts to create employment.
45. There is an opportunity for all states to build and strengthen alliances with like-minded actors based on a respect for human rights and to join forces in condemning those that do not. The EU has been active in promotion human rights in the region. However, countries such as Russia and China could find themselves "on the wrong side of history".

Rise of Islamist parties

46. The region appears to be experiencing a decline of Arabism and secularism. The Arab awakening of a century ago was characterised by secular rather than religious language and those regimes are now collapsing.
47. The current situation represents the political fruition and saliency of 30-year trends. Secularising politics are less prominent; the political space now dominated by sectarian, Islamic and tribal politics. Western models have declined. Turkey and Iran are not fully secular. The Sunni-Shi'a divide has become far more important.
48. Sectarianism is a challenge to the very cohesion of Arab states. The Arab uprisings have created an opening for Islamism. Conflict between Islamic groups and liberals is already growing and the Gulf States are wary. Historically, the Arab world was not a religious grouping: it was built on Arab racial identity, not on an Islamic "Ummah".

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49. Political Islam has been a component of Arab politics for 30 years. Suppressed by dictators, it is nonetheless well organised and has now found a public voice. The west needs to learn to live with it. From now on, the new and unknown leaders emerging from domestic politics will shape regional leadership. These leaders may no longer come from the Arab elites.
50. Support for Islamic groups is often pragmatic rather than ideological. Over time, groups are likely to split and more liberal parties will enter the running. Religion may eventually be separated from politics and take its place as a positive force in policy-making. Political Islam for the most part recognises democracy but the links between secularism and democracy need to be better understood. Ultimately, the embrace of secular values should be sincere rather than state-determined.
51. Some forms of Islam, such as Salafism, have argued for a rejection of the trappings of the modern world, claiming links to the suppression of Muslims. This is changing: for example, voting is no longer *haram* in Sudan's universities. However, there are still tensions between modern and medieval interpretations.
52. Sunni-Shi'a relations will continue to be a dominant issue. The rise of the Shi'a crescent two years ago now appears to be eclipsed by that of the Sunnis. Parties allied to the Muslim Brotherhood could soon dominate the political scene in countries across the Arab world, with the exception of Algeria. However, the outcome of the Syrian conflict may change the landscape.

Terrorism

53. Al Qaeda failed to bring about the revolution it sought in the Middle East. Instead, the Arab uprisings have been driven by civil society's demands for political reform and democracy and against tyrannical elites and corruption. This failure and the death of Osama bin Laden have clearly damaged AQ's credibility. Whilst this form of terrorism may be in decline, the medium and longer-term trends are unclear. Countries such as Iraq or Egypt could become major exporters of terror in the next 20 years.

The impact and influence of states

54. Turkey has positioned itself as a major diplomatic broker in the region and has favoured this modus operandi over that of military intervention. However, Iran's nuclear ambitions and the concerns about it achieving nuclear capability raise particular issues for Turkey and for the wider region.
55. The situation in Syria continues to be of concern, not least its relationship with Iran, the potential knock on effect on Iraq and the implications for Hamas. Whilst some states support intervention in Syria, others advocate national dialogue.
56. Europe could play a more meaningful role in the region, particularly given the advantage of its geographical location. In the absence of a more effective mechanism for action, there has been a greater recourse to NATO influence. The role of Europe may increase in the future including greater efforts to connect with post-revolution countries.
57. There is a perception that Russia and China, both asserting themselves as major powers, should do more to promote stability in the region. Both countries have an investment in the arms trade and the "promotion of insecurity" could be seen as a key economic driver. However, this argument could equally be applied to other states, including Iran and the US.
58. Qatar has a significant role, as demonstrated by its leadership style and the hosting of Al-Jazeera. It has provided an important entry point for dialogue as it continues to nurture a wide spectrum of relationships with Islamist group and states including Iran and the US.

“ Turkey has positioned itself as a major diplomatic broker in the region”

The power balance of the Middle East

59. The Middle East should not be seen in terms of “moderates versus radicals”. In the future, Arab military power may become less influential in contrast to a growth in non-conventional power. Iran’s approaching nuclearisation and the growing impact of new forms of warfare, such as cyber, will also have an impact.
60. The radical power axes are shifting and declining, as seen by the changing face of global terrorism and groups such as Hezbollah. The region could see the emergence of a federal grouping, not necessarily on religious grounds.
61. Soft power will continue to be exercised through a multiplicity of actors and drivers: democracy, political Islam, religious institutions, constitutional reform, social and traditional media, energy, trade routes, sanctions, diplomacy (influenced by empowered citizens), youth, women and non-governmental actors. NATO may grow in influence and the US may experience a decline.

Proliferation

62. The nuclear non-proliferation treaty (NPT), which entered into force in 1970, has been relatively effective in curbing development of nuclear weaponry amongst signatories. In addition to the five NPT nuclear weapon states (NWS) (US, UK, Russia, France and China), four states (South Africa, Belarus, Kazakhstan and Ukraine) have dismantled their nuclear programmes. Three non-signatory states of the NPT have developed nuclear weapons programmes (India, Israel and Pakistan), and one former NPT signatory (North Korea) has tested a nuclear device since withdrawing from the treaty. In the absence of the NPT there could now be 20-30 nuclear states.
63. Some states aspire to nuclear weaponry for prestige as well as military power and the nuclearisation of Iran could trigger a cascade. Iran embarked on its programme in the mid-80s, mainly as a deterrent against Iraq. The uprisings, particularly in Libya, are likely to have strengthened Iran’s nuclear aspirations.
64. The standoff with Iran is set to continue. It is unlikely to escalate its programme to the next stage and thereby trigger reprisals from several states. There is a further concern that if Iran acquired nuclear weaponry, groups such as Hezbollah could access the capability.
65. Nuclear programmes take many years to develop. Pakistan achieved its programme in the relatively short time-frame of 11 years. By contrast, Iran has been working on its programme for over 25 years.
66. The United Arab Emirates (UAE), a signatory of the NPT, has ordered 4 nuclear reactors from S. Korea. Other Gulf States intend to invest in nuclear power. These could be seen as hedging strategies: nuclear energy plants giving a head-start should the region proliferate.
67. There are several potential 2030 scenarios:
 - A military attack on Iran: Iran pushes ahead with its programme, leading to a nuclear cascade
 - Global Zero by 2025: peace in the region. The security architecture includes Iran. The prestige factor from having nuclear weapons has disappeared. Israel gives them up
 - Iran pulls back to capability, but not actually having nuclear weapons – in part to allay Israeli concerns. Other countries are protected by “umbrella” defence arrangements and do not develop weapons. Conceivably, this protection could be offered by countries other than the US, eg.China or Pakistan.
68. By 2030, nuclear technology will be 100 years old. “New” weaponry will have emerged: cyber, electromagnetic pulse weapons (EMP) and “low-tech” options such as the “dirty bomb”.

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69. Nuclear energy will continue to be developed for economic reasons. Oil-producing countries will seek to sell more oil abroad; while countries such as Jordan (which imports 95% of its energy) will seek to reduce energy costs from the current 25% of its GDP.
70. Development is also a driver, with the potential for nuclear energy being used in e.g. desalination. However, many claim that countries should have economic stability before embarking on nuclear.
71. Nuclear security will continue to be an important factor for the next 20 years with a particular focus on Iran's programme and its deployment as a "strategic fear". However, this should not distract intention from the aspirations of other states.

Energy

72. Whilst the state oil companies of the Gulf region (the "six brothers") will dominate future oil production, the MICs (Middle East, India, China) will account for the main growth in demand for oil.
73. By 2030, alternative energy sources will come to the fore, particularly with regard to transport. Water, and particularly desalination programmes, will become a significant component of the energy nexus.
74. Saudi Arabia is on course to becoming a net oil importer by 2037 due to rising domestic consumption. It is unclear whether the removal of subsidies is politically feasible in MENA countries such as Saudi Arabia. However, it is likely that Saudi Arabia will experience significant budgetary pressures.
75. The US is becoming less dependent on Mid-East oil, but is still vulnerable to oil price rises when, for instance, there is a spike in Chinese demand. It is forecast that, within 20 years, China will import 72% of its crude oil and China's Sinopec has recently entered a joint venture with Aramco in Yanbu, Saudi Arabia.
76. The development of alternative oil sources may lead to a decline in US and Canadian imports. Shale gas and enhanced recovery techniques applied to fallow oil fields are all significant but uncertain factors, while an increase in Brazil's production could make the western hemisphere self-sufficient. China will still be reliant on oil through the Straits of Hormuz.
77. Regional Arab cooperation on gas is more likely than on oil. There is also a question mark over the supply and demand of alternative energy, such as solar. In the Middle East, the latter is less effective than was hoped, due to problems with sand obscuring the solar panels.
78. EU sanctions on Iran will cause "transitional friction" with the price of crude oil rising in the Atlantic Basin and Iran selling to Asia at a lower price. At some point, a new equilibrium will be found. However, this is based on the assumption that Iran does not retaliate. The threatened closure of the Straits of Hormuz is Iran's "trump card" and will continue to be played in warding off potential attacks.
79. It is unclear if Saudi Arabia would respond positively to a US request for an increase in oil to replace Iranian supplies. The relationship between the two countries has changed since the fall of Mubarak, with the Saudis no longer feeling confident of US support. Notably, the use of Saudi oil would diminish their reserves to almost zero.
80. The Iraqi National Oil Company (INOC) kept oil flowing under Saddam, but production in Iraq is now unpredictable and unreliable. The shortage of qualified man-power in Libya combined with security and political problems in Iraq, mean that oil supplies will remain problematic.

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Future scenarios

81. The next 20 years could see a wide range of scenarios play out in the MENA region. The continuation of the “Mideast Mosaic” currently characterised by pluralistic governance, constitutional monarchies, authoritarian regimes and unstable states cannot be taken for granted. All states in the region have been compelled to examine the nature of governance and to consider the potential for change. The Syrian situation is critical and may prove to be a catalyst for further instability.
82. The Arab uprisings, although driven by an optimistic desire for more open governance may nonetheless have negative consequences. The next 20 years could see a resurgence of extreme ideologies with a battle of ideas over the “isms” including socialism and sectarianism.
83. The aspirations of the mainstream Islamic parties and their adherence to democratic systems, have already triggered a debate about confidence in Islamic democracy and ways in which the global order will need to adapt to ensure its incorporation.
84. A worst case scenario for the region could see fragmentation as “things fall apart”: with increased nuclearisation, an escalation of the Sunni-Shi’a conflict, a further dramatic downturn in the economy and a decline in natural resources.
85. Re-alignments between states, internal tensions coupled with weak central governments and challenges to existing borders igniting further conflicts could all feature. Kurdistan, Kuwait, Sudan and Yemen could all see dramatic changes.
86. The dramatic events in the Middle East have had an impact that goes far wider than the region. They should be seen in a holistic way, an opportunity for fresh thinking, with the potential for new mechanisms and institutions to support and promote positive change.

Alun Rhydderch

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