



INFORMATION TECHNOLOGY





KPMG is the global network of professional advisory firms, whose aim is to turn knowledge into value for the benefit of our clients, our people and the capital markets. We advise clients on managing business performance through domestic and global sourcing, whilst controlling associated risks. An independent advisor, KPMG's Sourcing Advisory practice works with key stakeholders (users and providers of outsourcing services; government and industry associations) across major demand and supply side geographical markets.

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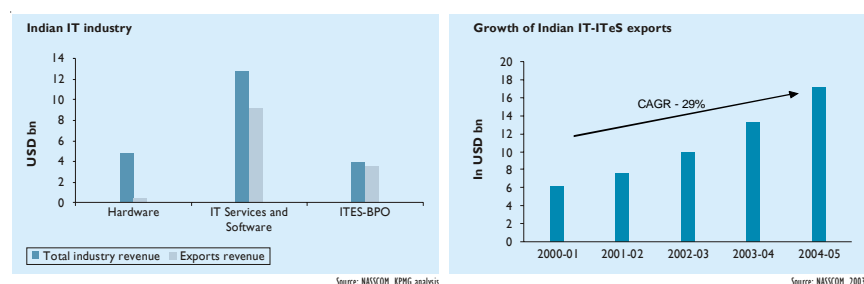
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A report by KPMG for IBEF

Market overview

Over the past decade, the Information Technology (IT) industry has become one of the fastest growing industries in India, propelled by exports (the industry accounted for more than a quarter of India's services exports in 2004-05). The key segments that have contributed significantly (96 percent of total) to the industry's exports include – Software and services (IT services) and IT-enabled services (ITeS) ie business services. Over a period of time, India has established itself as a preferred global sourcing base in these segments and they are expected to continue to fuel growth in the future.



Exports contribute significantly to the Indian IT industry's revenues with key segments being IT services and software and ITES- BPO

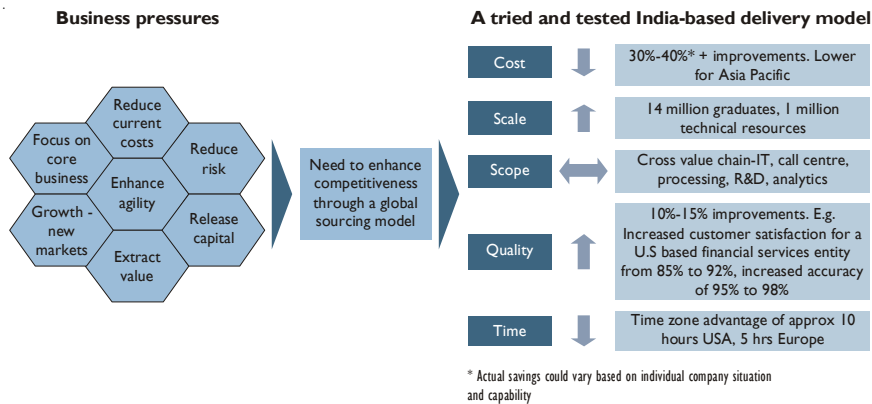
Even assuming a conservative growth rate of 20 percent, Indian IT-ITeS exports could reach US\$ 42bn by 2010.

These segments have been evolving over the years into a sophisticated model of operations. Indian IT and ITeS companies have created global delivery models (onsite-near shore-offshore), entered into long term engagements with customers, expanded their portfolio of services offerings, built scale, extended service propositions beyond cost savings to quality and innovation, evolved their pricing models and have tried to find sustainable solutions to various issues such as risk management, human capital attraction and retention and cost management.

Demand dynamics

A key demand driver for the Indian IT services and ITeS industry has been the changing global business landscape which has exerted performance pressures on multinational enterprises.





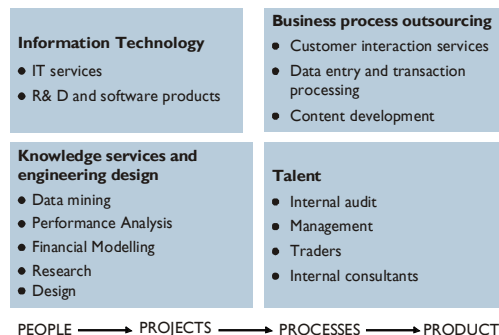
While companies initially sourced from the Indian IT and ITeS industry for cost, quality and enhanced competitiveness have induced them to continue and expand. Some companies have also viewed sourcing differently (beyond cost and quality) and achieved non-traditional benefits of sourcing from India.

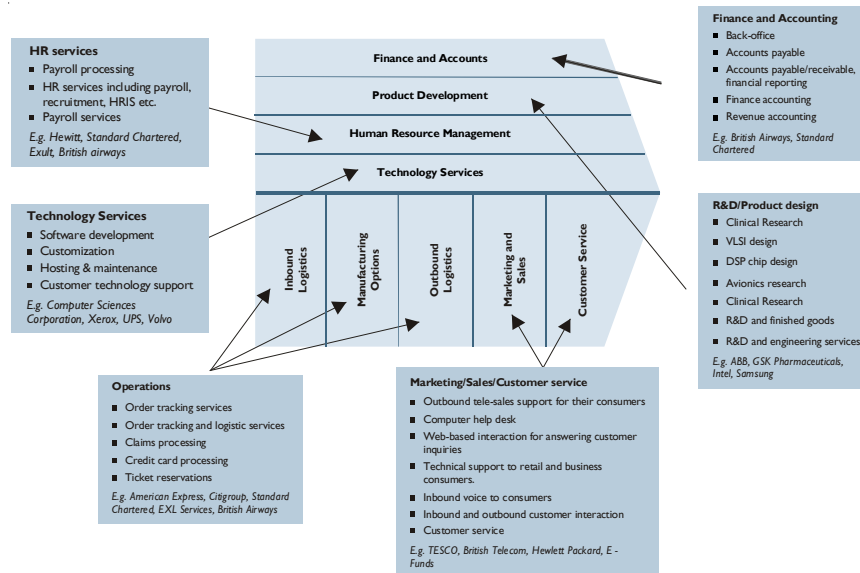
| | | | |
|--------------------------------------|--|--|---|
| Peak work-load management | India resources used to process peak period transactions | Undertaking hitherto uneconomical activities | Given lower cost thresholds, certain labour activities become economically viable in an India based delivery model. For instance, reconciliations |
| Offshoring existing outsourcing work | Work that is currently outsourced has sometimes been offshored first given relatively fewer change management issues | Cost Reduction | Replacing overseas team with Indian resources |
| Cost Effective Expansion | Using India for team expansion purposes without reducing existing team | Skills Availability | Using India as a delivery base to fill resource availability / quality gaps in other regions |
| Capacity Release | Work transferred to India to enable existing overseas team to focus on higher value activities | One-off projects | One off projects such as reconciliations, report preparation, delivered out of India |

Range of service offerings

The range of services offered by the Indian IT services and ITeS industry to these global corporations range from simple tasks to increasingly complex activities and span across the entire value chain of a typical organisation

What gets sourced

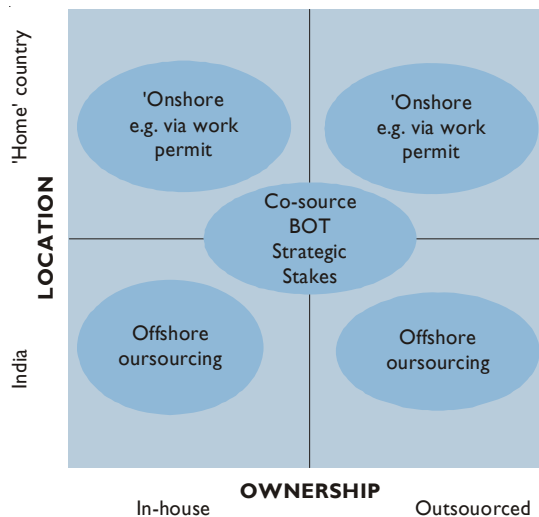




Source: News reports, IBEF study of Fortune 500 companies in India, IBEF study of successful US and UK companies in India: Illustrative and not exhaustive

Sourcing models

A wide range of sourcing models have evolved for sourcing IT and ITeS services from India based on the required capabilities as well as risk profiles.



There is an increasing trend towards a global delivery model (higher proportion of offshore in the onsite – near shore – offshore mix) as well as a preference for captives and co-sourcing arrangements, though mature captives are gradually tending towards becoming third party service providers.



The India advantage

Various country comparison studies have established the attractiveness of the Indian IT services and ITeS industry.



Source: AT Kearney Offshore Location Attractiveness study 2005

The key attributes that have enabled India to establish itself as a preferred sourcing base include:

Vast Access to Skill base:

- Large pool of resources for IT and ITeS operations - 14 million graduates, 1 million technical resources, one of the largest English speaking manpower in the world.
- Availability of quality delivery management talent from international banks and consulting firms.

In the future, while the increasing demand for resources may put pressure on the resource base, initiatives are currently underway to enhance the supply of quality human capital in the country.

Strong quality orientation

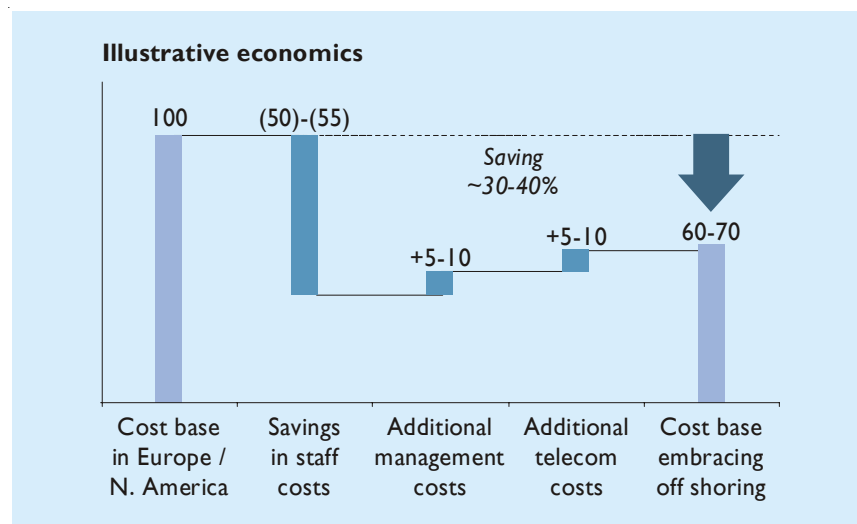
- ISO9001, COPC, 6 sigma are some of the established quality initiatives.
- 80 out of the world's 117 SEI CMM Level 5 companies are from India.

Availability of high quality infrastructure

- Concerted efforts to provide dedicated, international quality, cost effective real estate at software parks, Special Economic Zones (SEZ) and knowledge sector industrial estates.
- Availability of high quality international and national dedicated telecom infrastructure with high level of redundancies insulating centres from Public Switched Telephone Network (PSTN) quality.
- Availability of multiple levels of backups providing insulation from public system issues, if any.

Cost advantage

The cost impact of sourcing from the Indian IT and ITeS industry can be significant due to the lower wages and lower cost of living.



While the increasing demand for resources is gradually adding pressure on labour costs, companies within the industry are attempting to sustain cost-competitiveness through appropriate location choices and revamped human resource management practices.

Enabling policy environment

The Government of India is taking proactive measures to encourage investments in this sector. Significant measures and incentives include a liberalised FDI regime, single-window clearance facility, income tax holiday and customs duty exemptions. State governments too are demonstrating a proactive approach towards attracting and facilitating investments and are



providing support for the development of specialised infrastructure, focussing on development of a larger base of cities/towns to meet the needs of the industry and undertaking measures to continually enhance the supply and quality of manpower.

Mature industry eco-system

The support infrastructure for the Indian IT and ITeS industry which includes specialised firms for functions such as recruitment, training, property management, security, fleet management, book-keeping and payroll as well as industry associations has evolved over the years.

Availability of private equity

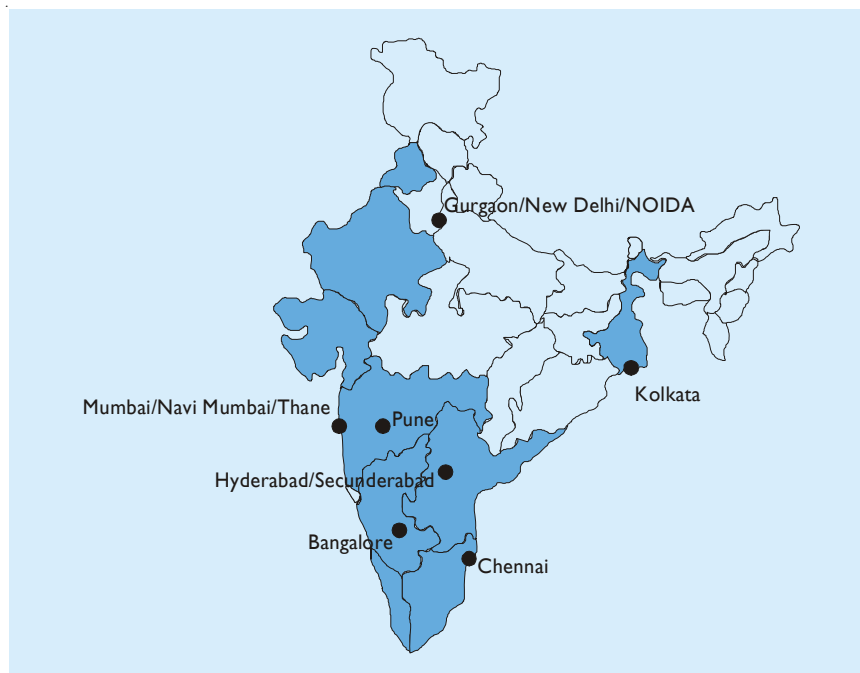
Presence of a mature private equity industry to support local entrepreneurs (organisations such as Warburg Pincus, General Atlantic, CDC).

Commitment to address security concerns

Indian companies as well as the government have been active in adhering to international security standards such as ISO 17799, BS7799, COBIT and ITSM. The required legal framework has been laid down by the government and a revamp of the country's Information Technology Act, 2000 is expected in the near future. The revised legal framework is likely to include provisions against a new range of computer crimes to cover areas like privacy, information protection and harming computer systems through viruses.

Prominent IT services and ITeS locations within India

A majority of IT / ITeS activity in India is concentrated in seven cities / clusters in India. With concerted development efforts of a wider base of cities / towns, the geographical spread of IT / ITeS activity is gradually expanding to cover cities such as Ahmedabad, Jaipur, Coimbatore, Kochi, Trivandrum, Chandigarh, Mysore, Mangalore, Madurai and Bhubhaneswar.



Various companies have chosen to locate their operations in one or more of these seven clusters based on parameters such as:

- Leveraging local experience and assets
- Spreading to reach right skills at right costs
- Business continuity requirements.

| City / cluster | Key companies in the location (Illustrative and not exhaustive) |
|---------------------------|--|
| Mumbai/Navi Mumbai/Thane | ABN Amro, Morgan Stanley, Citigroup, Accenture, Tata Consultancy Services, World Network Services |
| (Gurgaon/New Delhi/Noida) | Genpact (formerly GE Capital International Services), Sapient, HCL Technologies, American Express, McKinsey research centre, E-Funds Corporation |
| Bangalore | JP Morgan, Goldman Sachs, Siemens, Infosys, Wipro, Tata Consultancy services, Cognizant Technology Services, Genpact (formerly GE Capital International Services) |
| Chennai | Citigroup, Standard Chartered (Scope International), World Bank, Ford, Hewlett Packard, AIG, Infosys, Tata Consultancy Services, Cognizant Technology Services |
| Hyderabad/Secunderabad | HSBC, Microsoft, Franklin Templeton, Infosys Wipro, Tata consultancy services, Cognizant Technology Services, Genpact (formerly GE Capital International Services) |
| Pune | World Network Services, Cognizant Technology Services, HSBC, Veritas, sybase, AXA, Mellon Financial |
| Kolkata | HSBC, Genpact (formerly GE Capital International Services), IBM, Infosys, Tata consultancy services, Cognizant Technology Services |

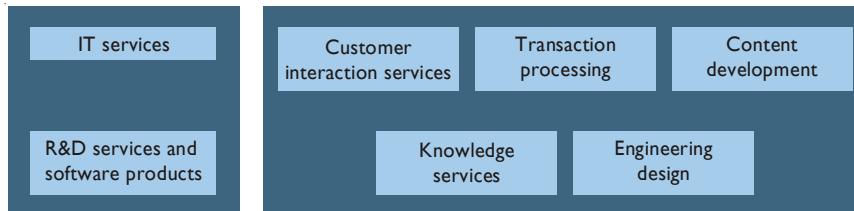
Source: News report, Company websites



Key Opportunities

Opportunities in the Indian IT services and ITeS industry

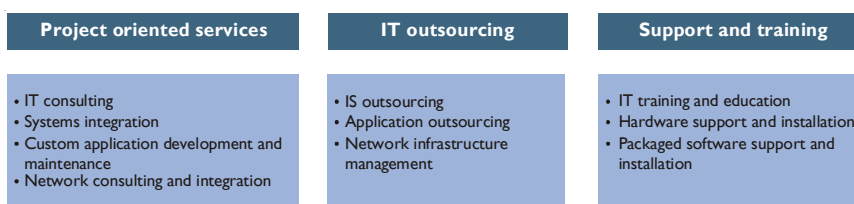
The opportunities in the Indian IT services and ITeS industry can be classified along the following broad categories:



IT services

The range and depth of capabilities have enabled the Indian IT services industry to gain a respectable position in the global IT services market (Indian industry expected to achieve market share of almost 30 percent by 2008 in key segments such as application development and application outsourcing as per NASSCOM-McKinsey estimates). The key factors that have enabled the industry's success are end-to-end solutions capability, focus on stringent processes and quality of execution, global delivery model (combination of onshore and offshore with an increasing offshore component), high-end, mission critical service capabilities and strong project management methodologies and expertise.

Opportunity segments within IT services



Some multinational corporations who have leveraged the India advantage for IT services (either through a captive unit or through outsourcing include Siemens, Citigroup, Microsoft, Cisco, Hewlett Packard, Nortel, Boeing, Airbus. *(Illustrative and not exhaustive; Source-News reports)*

R&D services and software products

Indian R&D services and software product exports, though at a nascent stage, is expected to grow rapidly (growth forecasts are US\$ 8-11 bn by

2008-10: Source – NASSCOM). The key opportunity areas within R&D services and software products include embedded software and systems and offshore product development.

A number of large multinational corporations source a part of their embedded system requirements from India either through captive design centres or through vendors. Some of these companies include Samsung, Texas Instruments, Delphi, STMicroelectronics, Motorola, Intel, Analog Devices and National Semiconductor (*Illustrative and not exhaustive; Source-NASSCOM*). Apart from multinational corporations sourcing requirements from India, there are over a 100 Indian companies operating in the embedded software solutions domain. Also, in addition to the export of products developed by the offshore units on behalf of MNCs, a few Indian vendors (e.g. Infosys, I-Flex Solutions) have successfully expanded their revenue streams to include their own software products.

Customer interaction services

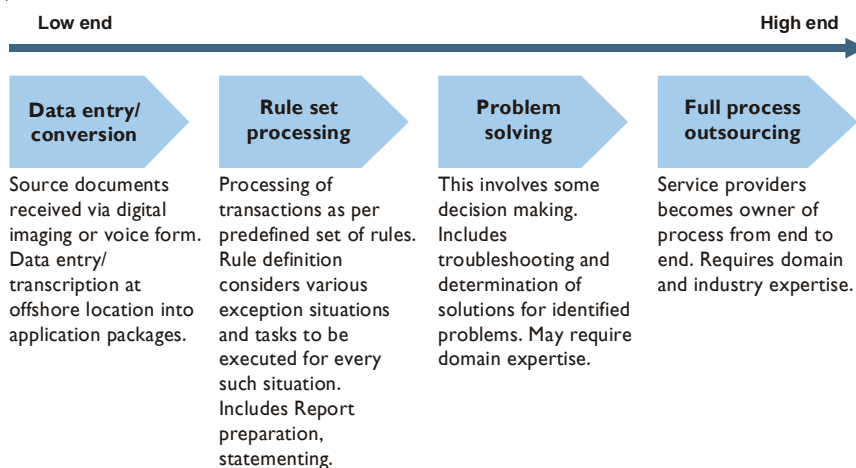
Customer interaction services is one of the largest segments within the Indian ITeS industry contributing almost 30 percent to the total revenues in 2004. The predominance of customer interaction services is gradually decreasing due to pricing pressures as well as increasing depth of sourcing relationships which have include a new range of service offerings. However, while the share in the total pie may be decreasing, the outlook for this segment is still favourable due to strong demand from customers who have not sourced customer interaction services in the past as well as expansion of the customer care service offering to include more complex activities such as higher-end technical support.

Select multinational corporations who have leveraged the Indian advantage for business process outsourcing services include Citigroup, American Express, General Electric and Hewlett Packard. (*Illustrative and not exhaustive; Source-News reports*).

Transaction processing

Cost advantage, access to an abundant skill pool and commitment to quality of delivery have enabled the rapid growth of this segment. The range of capabilities sourced from India in business process outsourcing has been illustrated below:





Select multinational corporations who have leveraged the Indian advantage for business process outsourcing services include General Electric, Citigroup, Standard Chartered Bank, ABN Amro, Bank of America, American Express, British Airways and IBM (Illustrative and not exhaustive; Source-News reports).

Content development

The Indian ITeS industry offers a range of services to various multinational organisations catering to their digital content development needs of website management, production and delivery of multimedia over new media, including CDs, DVDs and Internet TVs, movie production and gaming. Key players offering / sourcing content development services from India include Walt Disney, Laserwords and Techbooks (Illustrative and not exhaustive; Source-News reports).

Knowledge services (non-IT)

Recent years have witnessed a spurt in sourcing of knowledge based services as the industry has moved up the value-chain and built high-end capabilities. While this trend is particularly evident in financial services, sourcing of knowledge services has also gained ground in industries such as pharmaceuticals and biotechnology, entertainment and aerospace.

The key opportunity areas and their market potential have been illustrated below:

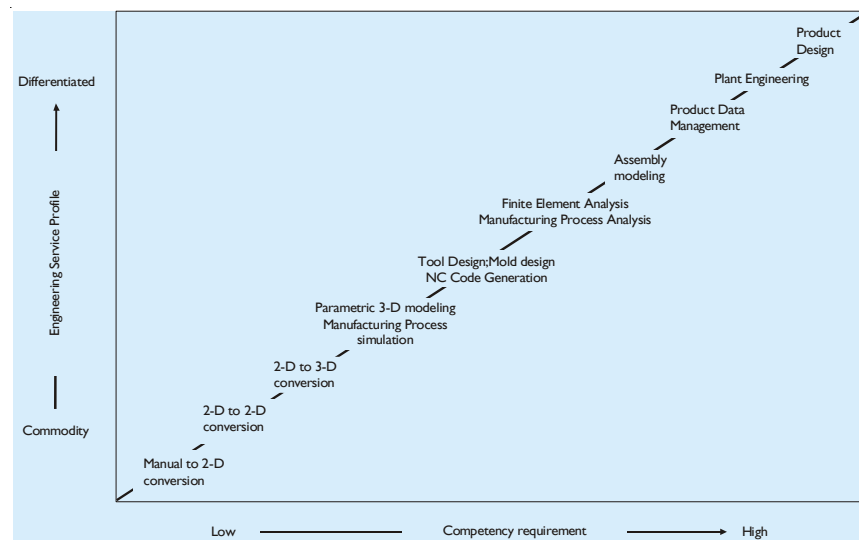
| Opportunity | 2003 (US\$ bn) | 2010 (US\$ bn) | CAGR (%) |
|--|-------------------|-------------------|-------------|
| Basic data search, integration and management | 0.3 | 5.0 | 50% |
| Market research, competitive intelligence | 0.02 | 0.4 | 54% |
| Equity research, actuarial analytics and data modeling | - | 0.4 | NA |
| Animation and simulation | 0.1 | 1.4 | 46% |
| Remote education, publishing | - | 0.3 | NA |
| Medical content and services | - | 2.0 | NA |
| R&D (other non-IT areas) | 0.1 | 1.0 | 39% |
| Biotech and pharmaceuticals | 0.28 | 3.0 | 40% |

Source: Evalueserve

Select multinational corporations who have leveraged the India advantage for knowledge services include General Electric, J P Morgan, Citigroup, American Express, McKinsey, Pfizer, and A C Nielson. (Illustrative and not exhaustive; Source-News reports).

Engineering design

A significant emerging opportunity for the Indian ITeS industry is in the realm of engineering design which is expected to grow to US\$ 4 bn by 2010 (Source: Evalueserve). While the scope of engineering design covers a broad spectrum of complexity levels, different players have emerged across the spectrum by building the requisite capabilities.



Key players offering / sourcing engineering design services from India include Bechtel, Ford Motor Company, General Electric, General Motors and Datamatics (Illustrative and not exhaustive; Source-News reports)



Key emerging trends impacting the Indian IT services and ITeS industry

While the Indian IT services and ITeS industry is poised for rapid growth over the next few years, there are emerging trends which are likely to impact their operating models and the industry players would have to appropriately adjust their operations to capitalise upon / manage these trends.

Some key emerging trends include:

Demand related

- Offshoring is now mainstream and increasingly an integrated approach is being adopted across service types. Also, with more experience with the concept, offshoring projects are moving beyond pilots and there is better and coordinated planning, execution and monitoring of offshoring projects.
- Transaction processing is growing faster than customer interaction services and is likely to dominate future growth. Key segments which have contributed to this growth include finance and HR processing.
- Demand for offshoring has extended beyond the banking and financial services industry and other key verticals that are likely to be demand drivers in the future include telecom, healthcare and entertainment / media.
- While a range of sourcing models exist and continue to evolve, the preferred models are captives and hybrid options.
- There is likely to be greater focus on risk, compliance and information security issues and therefore risk management is likely to be the dominant theme (both offshore and on-shore).

Supply related

- Evolving market structure with consolidations, IPOs and other transactions.
- Emergence of other competing countries and need to appropriately manage people, telecommunications and infrastructure costs to ward of competition from the same as cost arbitrage is still a significant driver for offshoring.
- Possible demand-supply gap for trained manpower in the medium to long term and therefore need to invest in enhancing supply of trained manpower.
- Development of a larger base of locations for IT and ITeS with supporting ecosystems.

Select case studies

General Electric (GE)

GE was among the first global companies to choose India as a sourcing hub and the company has been very successful in sourcing products, services and intellectual talent from India for a wide cross section of its global businesses

- GE pioneered the concept of software sourcing from India through Offshore Development Centres across the country
- The JFWTC is India's first and largest multi-disciplinary research centre, which provides critical technology, research and development for GE's diverse global businesses
- Medical Systems, Appliances, Aircraft Engines, Industrial Systems, Power Systems and Transportation Systems develop and provide design and engineering services and analysis for GE global businesses
- GE Capital Services (GECIS, now renamed GENPACT) which has been a large part of GE in India till now has catered to the diverse needs of a global business through its outsourcing services which include transaction processing, finance and accounting services, call centre services, customer fulfillment activities and processes, data modeling and analytics support, managed IT services, software solutions and e-learning.

Extract from "GE India: US Companies in India – Success Stories" – IBEF

American Express

American Express Global Service Centre provides voice and data based processing to support a variety of the company's card, financial services and travel-related businesses in the US and other countries. It provides fraud and risk modeling and financial processing to American Express customers worldwide. These operations also involve partnerships with outsourcing vendors and are an important part of the company's efforts to expand its global infrastructure base. Global Service Centre's Asia operations commenced in January 2001 and it is headquartered in India representing the company's continued focus on India as a primary location for developing additional servicing capacity to support global businesses.

Extract from "American Express: US Companies in India – Success Stories" – IBEF



Citigroup

Software development for global operations – Citigroup has made India its global software development, software maintenance and BPO hub. Polaris Software Lab, an India-based leading global provider of financial technology solutions and offshore IT services, has developed, deployed and supported solutions for over 10 million Citibank customers in 70 countries across the world

Back office operations for global operations - Citigroup has established e-Serve International Ltd. (formerly known as Citicorp Securities & Investments Ltd.) in India, for its BPO activities. E-Serve focuses on providing IT-enabled solutions to the financial services industry, supported by latest technology and robust infrastructure for volume-intensive processing and the customer care needs of its customers located in over 25 countries across North America, Europe, Africa, South Asia and Middle East. E-Serve handles all the cash management and trade finance transaction processing for Citibank India, Sri Lanka and Bangladesh; credit card services for Eastern Europe, Middle East and Africa and bank back-office processing work for Citibank in Europe.

Extract from “Citigroup: Fortune 500 Companies in India – Success Stories” – IBEF

EDS

India as a global sourcing base – EDS is one of the largest players in the BPO industry. The company had set up its India operations to service several Fortune 500 clients. It has development centres in Mumbai, Pune, Gurgaon and Chennai, which operate mainly on its product life cycle management practice. The company set up a centre in Mumbai in 2003 to handle services like voice and data communication, data entry, financial process management, among others.

India as a software development and maintenance hub – EDS India has established its software development operations which provide services to global customers. EDS – India leverages the local pool of high-quality information technology professionals and the availability of high speed data communication links to services the global requirements of the organisation

Extract from “EDS Electronic Data Systems (India) Pvt. Ltd.: US Companies in India – Success Stories” – IBEF

Cisco

India as a R&D hub – Recognising India’s wealth of software talent, Cisco established GDC in Bangalore in 1999. It is the largest outside the US. The

centre plays a strategic role in Cisco's global operations in deploying the solutions and products in the Internet economy. R&D work in India focuses on certain core technologies. Several products in Cisco's stable have been developed entirely in India. Cisco's Bangalore GDC has 2000 plus engineers and is presently working with HCL Technologies, Wipro Technologies, Infosys, TCS, Satyam Computers, Hughes Software and Zensar.

Extract from "Cisco Systems: US Companies in India – Success Stories" – IBEF

Intel

Intel set up its first R&D centre (Intel India Development Centre – IIDC) in Bangalore in 1999. Intel is using this facility to work in e-Business applications, networking and communications, microprocessor and chipset design, manufacturing automation and systems software. Key programs at the centre include:

- Design of the next generation microprocessors for server architecture.
- Next generation mobile chipsets for the Intel Centrino™ Mobile Technology.
- BIOS Display, now installed in over 100 million PCs was developed in India.
- Next generation switching silicon and router products.

Extract from "Intel Technology India Private Limited: US Companies in India – Success Stories" – IBEF

Samsung

Samsung has set up two R&D centres in India, at Bangalore and Noida. Both the R&D centres are involved in cutting edge research and development.

- The Noida centre is involved in the business of developing embedded software for Samsung Electronics Corporation in a variety of areas related to Digital TV and Multimedia technologies. The centre has successfully completed more than a hundred projects in collation with Samsung Headquarters Visual Display and Digital Media divisions. Its engineers continuously strive to improve performance and introduce innovate features to make the end products more efficient and user friendly. It designs and implements some of the critical software components for products such as next generation CRT and Projection TVs, Plasma and LCD TVs, DLP TVs, Digital TV Set Top Boxes, DVD Players, MP3 players, PDAs, 2D/3D Graphics Engines, Video editing and playback, Multimedia applications etc.



- The Bangalore operation is involved in the business of developing software for Samsung Electronics Corporation technology solutions in a variety of different areas. It is known for the expertise that it possesses in certain key technology domains. Its contributions have been in very key knowledge based areas of new and evolving technologies like 3G, UMTS, CDMA2000, Multimedia, Home Networking, Digital Media, System LSI, Network Protocols, Wireless Terminals to mention some. The centre boasts of a highly talented and motivated workforce who have been constantly enriching their knowledge and skills

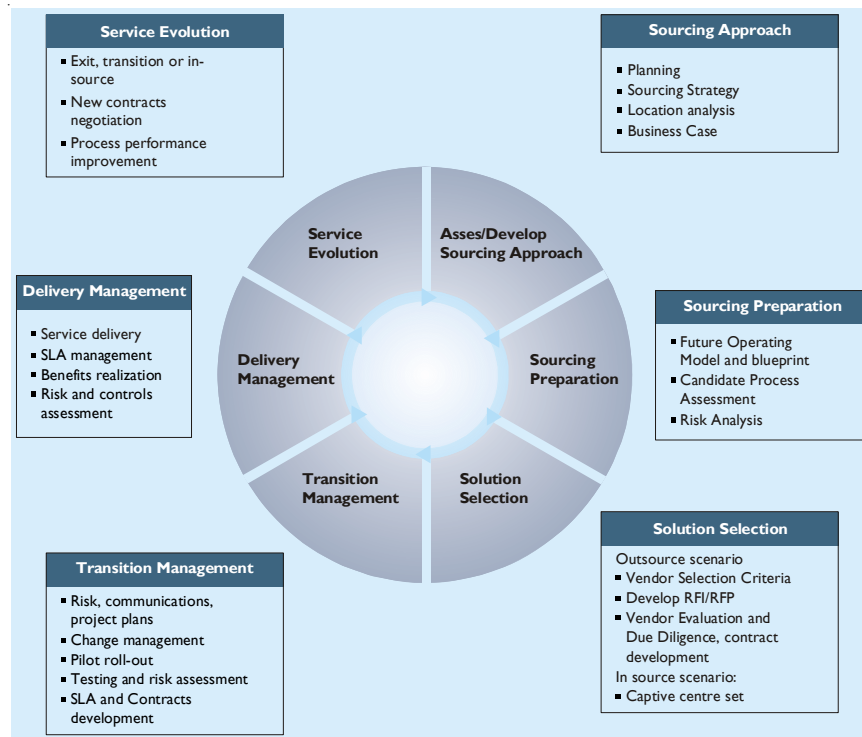
Extract from “Samsung India Electronics Limited: Fortune 500 Companies in India – Success Stories” – IBEF

A typical sourcing programme – Risks, roadmap and timelines

There are several potential risks that are typically associated with offshore sourcing. While some risks affect any outsourcing initiative, others become relevant in cross border sourcing programmes.

- **Strategic Risks** - Risks associated with the scenarios, plans, directives and decisions that dynamically define and integrate the internal and external resources and services required to fulfill the enterprise's business objective.
- **Operational Risks** - Risks attributable to operational problems with service or product delivery or inability of an entity to recover fully and timely from unforeseen events.
- **Financial Risks** - Risks attributable to interest rate and foreign exchange rate movements or the entity's inability to meet payment obligations as and when they fall due.
- **Regulatory Risks** - Risks caused by violation of laws, rules, regulations, prescribed practices and ethical standards.
- **Technology Risks** - Risks relating to the failure of the outsourced entity's IT environment to effectively process and deliver products.
- **Reputational Risks** - Risk of negative publicity regarding business practices associated with the outsourced operation.

Companies in this industry have tried to manage these risks by adopting a structured and planned approach to the sourcing programme which identifies and highlights key risks. Upon evolving a robust risk framework, companies have attempted to mitigate / manage these risks by building strong governance structures, appropriate contractual provisions, relevant management and operations delivery practices. The schematic below illustrates a structured approach and roadmap to a typical sourcing programme.



The elapsed timelines for operationalising a sourcing programme varies based on the level of complexity of service offerings, experience of the potential ‘sourcer’ with offshoring as well as the extent of pressure associated with business drivers that have led the ‘sourcer’ to consider offshoring. However, while these considerations impact timelines upto the point of business case establishment, subsequent operationalisation (across models – greenfield captive, outsourcing, hybrid) i.e. ‘go-live’, could be achieved in approximately 6-9 months. For example, in a greenfield venture, key activities would include regulatory and tax clearances, physical infrastructure set-up and fit out, IT and telecom infrastructure set-up, administration related agreements set-up, business continuity planning, management and operations staff recruitment which could be completed over a period of 6-9 months.



The Indian IT services and ITeS industry - The road ahead

The Indian IT services and ITeS industry is poised for rapid growth over the next few years by offering a wider services portfolio, catering to a larger set of industry verticals and evolving / adapting to suit the service delivery preferences of global customers. Key challenges that the industry faces include the need to sustain competitiveness in the face of alternative emerging locations and enhancing supply of quality human capital to cater to increasing demand. Efforts in this direction are already underway and continuous emphasis on the same is imperative to ensure that the industry's future growth is undeterred.

IT for development

The contribution of IT in the development of the rural areas is critical and efforts are underway to enhance the awareness and penetration of IT in rural areas. Attempts to increase the depth of IT services in rural areas range from small initiatives like single computer information kiosks to the "Wired Village Project" where dozens of villages are provided high speed internet connectivity.

The government as well as the private sector has been actively involved in the dispersion of IT and IT based services to rural India. Some models include:

- ITC Limited has set up an initiative called "e-chaupal" which aims at facilitating productivity enhancement by offering services and information on subjects like weather, market prices, scientific farm practices etc. The venture has proved to be successful and the number of e-chaupals have risen to 2,700 which cover a population of 1.2 million in five states. ITC plans to expand to 20,000 e-chaupals in the next few years.
- TARAhaat Information and Marketing Services Development Alternatives (Technology Action for Rural Advancements), a well-known Indian NGO, is focused on using technology for providing sustainable livelihood in villages. The strategy deployed is to evolve a commercially viable IT-based enterprise and to deliver public benefits by satisfying private needs. The services provided are education, e-governance, insurance, mini-credit financing, rolling out development packages made by NGOs and e-communications.
- A private Indian IT company, Aksh Broadband, has executed the Gramdoot programme in Jaipur district (in the state of Rajasthan) in western India. The model is based on fibre optic technology laid through the district to carry voice, data and graphics. The optic fibre cable runs for 3000 kms and benefits a population of 6 million people. All government records are online - from land records to revenue

collected – and health and education services are provided real time in Jaipur district. It is in fact the first time anywhere in the world that land deeds are offered to the villager in real time. To help sustain this model commercially, a small charge is administered for the services provided. The model is cost effective, has rapid deployability, and has demonstrated ease of operation and maintenance.

- The “Param” project by Ogilvy and Mather aims to improve rural connectivity in backward areas.
- “Drishtee” has focussed on provision of e-governance facilities and information services to the rural community.
- Attempts to impart IT education to students from rural areas are pursued by Microsoft and the Azim Premji foundation.

Some players in the Indian IT and ITeS industry have also included rural India in their capability sourcing models. Select examples include:

- Lason India, an end to end outsourcing company is promoting village BPO's where functions like data entry and data processing are carried out from rural areas.
- Datamation group is a Public Private Partnership where NGO's train individuals from under-privileged sections of the society and employ them in BPO's owned and run by them.



CONTACT FOR INFORMATION

Information on the market and opportunities for investment in the IT-ITeS sector in India can be obtained from the Confederation of Indian Industry (CII), which works with the objective of creating a symbiotic interface between industry, government and domestic and international investors.

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