

NAEGA MAP Trip Report - IGTC Working Visit - Delhi, Mumbai - India

Name of Traveler:

Katy Lee, IGTC Secretariat Patrick Hayden, NAEGA/IGTC Contractor

Dates of Travel:

Sunday, January 29 – Friday, February 10

Purpose of Travel:

Consistent with advancing NAEGA UES objectives Katy Lee, NAEGA Contractor and Secretariat of the International Grain Trade Coalition (IGTC) and Patrick Hayden, a consultant contracted by NAEGA, traveled to New Delhi and Mumbai, India on January 29- February 12.

Starting in New Delhi from February 1-3 Ms. Lee and Mr. Hayden attended and represented NAEGA and the IGTC at the Global Grain, Food and Feed Conference. During the conference, they met with Indian business and government stakeholders to discuss IGTC policy files and contribute to NAEGA research on tariff and non-tariff barriers for GRNOS.

From February 7-12, Ms. Lee continued on to Mumbai. In Mumbai, Ms. Lee met and worked closely with IGTC members the Soybean Processors Association of India (SOPA) and the Solvent Extractors Association of India (SEA). As part of implementation of the IGTC 2017 Business Plan, the IGTC Secretariat will conduct a series of "working visits" with key IGTC Members. The working visits and related meetings with stakeholders and decision leaders will be used to gather insight as well as inform on IGTC Files. This mission to India is the first these working visits.

Summary of Findings/Conclusions/Accomplishment

The missions to India represent a significant first step for NAEGA in identifying opportunity to address a major emerging market and in forwarding the IGTC's global outreach via improved balance in geographical participation and increased leadership on key files. Thanks to the IGTC's two Indian member organizations: Solvent Extractors' Association and Soybean Processors' Association, the Secretariat was in a privileged position when on the ground in India. One such opportunity was the chance to take the stage twice at the annual Global Grain Food & Feed Conference (G2F2).

This was NAEGA'S first visit in several years to India and important information was gathered regarding India's role in shifting global trade flows of cereals, oilseeds and other agri-bulks. The IGTC's two Indian member associations approach grain trade challenges in different ways, at the same time as being united in prioritizing the goal of food security for India's 1.2 billion population.

New Delhi

Monday, January 30



Indian Pulse and Grain Association (IPGA) – Meeting with governments on phytosanitary issues

The India Pulses and Grains Association (IPGA) welcomed the IGTC to a meeting of Shri. Ashwani Kumar, Joint Secretary at the GOI department of plant protection with Trade Commissioners, Counsellors and Agriculture Counsellors from 20 countries. The meeting was convened following an announcement by the GOI PQ Department that full measures on noncompliance of Methyl Bromide fumigation for agri-commodities will come into effect from April 1st, 2017. This means that any consignment/cargo arriving without MBR fumigation from load port will be rejected by the GOI PQ Department. The objective of the meeting was to get the PQ Team and all Trade commissioners and Agriculture Counsellors of exporting countries on a single platform and provide them with guidance from the PQ Team on the way forward to ensure that there are no rejections from April 1st. The PQ Team included Mr. Ashwani Kumar, Dr. A K Sinha (PPA), Dr. V K Srivastava (JD-PQ), Dr. P S Nain (JD-PQ for Mumbai) and about 6 other PQ Department official and scientific officers.

GOI representatives used the opportunity to highlight the **rationale** of its decision to other governments; to highlight the **need** to use of Methyl Bromide; and appeal to exporters to explore **other options** for pest control, such as alternate fumigants, pre-inspections, or a system-based approach.

Finally, Mr. Ashwani Kumar has appealed to all the Trade Commissioners, Counsellors present to urge their NPPOs to connect with his Department at the earliest opportunity in order to avoid trade disruptions. He assured that the PQ Department will revert on any communication received from the origin countries on a priority basis.

Tuesday, January 31

Meeting with Rakesh Dubey of Monsanto India.

Rakesh has worked for Monsanto India for 10 years and has been a key part of the company's response to GOI's push to impose a trait fee limit on biotech cotton. He provided background on what led to the trait fee's creation – a desire by a handful of Indian seed producers with political connections to increase their profits – and how Monsanto and other biotech players had responded after GOI officially imposed the limit.

Since the limit was imposed, Monsanto has cancelled plans to roll out 3rd-generation GMO cotton in India. Industry views the limit as a compulsory license and while they will continue to produce and support the 2nd generation cotton, they have shifted their focus to traditional, non-GMO seed breeds in India. Industry believes that as written the trait fee will apply to any GMO products, not just cotton. While cotton is the only GMO crop approved for commercial use in India, Monsanto and other providers have scaled back research on GMO in India. Several products designed for India were in the pipeline, and field trials for many had been approved, but domestic and international efforts have slowed since the fee was imposed. Rakesh felt it would also keep BT mustard, which has been developed and tested by Indian industry, from taking off once it is approved for production. This tracks with previous reporting out of India and will likely be a major impediment to future GM production. Unlike many we spoke to on the mission, Rakesh is pessimistic about the future of GMO in India.



Rakesh provided contact information for the India U.S. Grains Council Director and helped set up a Friday, February 3 meeting with him.

Meeting with Argentinian Foreign Service representatives

As a result of contacts made the previous day at the IPGA meeting, Argentina's foreign service representatives welcomed a lunch meeting with the IGTC to discuss action on key files: i) plant production methods; ii) Indian government action on phytosanitary control; and iii) electronic trading documentation. The IGTC was able to provide the latest information on these issues to support conversations. It was also an opportunity to promote the global membership and participation in the IGTC, which includes Argentine chambers of commerce CIARA and CEC.

Meeting with USDA/FAS Minister Counselor Scott Sindelar & Senior Attaché John Slette: The meeting with Post was extremely informative, and shined new light on the Government of

India's recent actions on Methyl Bromide (MB). Post believed that it was possible that GOI was ending the exemption that allowed for MB treatment in India because of an ongoing battle with the U.S. over access for Indian mangos. While exports of mangos into the U.S. had doubled between MY 2014 & 2015, the Indian government continues to press the issue, most recently at the U.S.-India Trade Policy Forum in November 2016. The key concern is that the U.S. insists on having USDA's Animal & Plant Health Inspection Service (APHIS) supervise the radiation treatment of Indian mangos in India before they are allowed to be exported to the U.S. GOI believes this unnecessarily drives up prices and delays shipments, costing their farmers. GOI does not object to the treatment so much as it objects to having APHIS inspectors doing this on

does not object to the treatment so much as it objects to having APHIS inspectors doing this on Indian soil. The move to end the exemption for pulses appears to be a way to force USG to negotiate on the mango issue. Post felt that the GOI was in an unsustainable position on the MB issue. Demand for pulses in India has been rising steadily, and India cannot meet demand with local production, even though they are expecting a bumper crop. The U.S. and Canada are the two largest exporters of pulses to India and a sudden halt to that trade would increase Indian food prices in a way that would negatively impact the political situation for the Government. Post did not know if GOI would relent on this issue, but felt that circumstances would force it to do so. Currently, the exemption that allows U.S. pulses to be fumigated with MB upon arrive in India ends on March 31, 2017.

Post also talked about the field of play on biotech crops in India. India's continued reluctance to allow imports of GMO soybeans has decimated the domestic crushing industry, and allowed India's neighbor, Bangladesh, which has no aversion to GMO, to develop a thriving crushing industry. Post related that they have heard stories that some Indian crushers near the border with Bangladesh were actually illegally importing GMO soybeans to their facilities to keep them operating, though this is not confirmed. Post expressed its belief that eventually GOI will be forced to accept more GMO crops due to the size of the population and the need to increase domestic yields. Post reported that while GOI officials still talk about organic farming publicly, privately the push for organic farming on a national level has been relegated to a talking point for the ruling BJP party.



As the Indian budget was expected to be released the following day, I asked Post if they expected any initiatives in the budget on ease of doing agribusiness in India. This had been a buzzword in several meetings during my last visit in India, in August 2016, with the Indian Planning Commission, known as NITI Aayog and the Ministry of Commerce both asking industry for input at the time. Post noted that they had heard little except that NITI Aayog was said to be developing a paper on the subject but that there had been no general request for input and that the doubted it would be part of the budget.

Finally, Post provided an interesting note – that while there are literally 1000's of "farmers groups" in India, very few of them actually have farmers participating in their discussions. The average Indian farmer does not have time to participate, so the groups, while usually created with good intentions, are almost all co-opted by local political parties when they reach a certain level of influence.

Post arranged for us to visit a Food Corporation of India (FCI) warehouse facility in northern New Delhi on Saturday, February 4.

Wednesday, February 1

Meeting with Cargill India

Cargill provided an overview of the current grain and soy oil market in India, including issues with domestic soy oil production and the fact that Indian farmers are producing soybean yields that are not close to meeting demand for soy oil, which is why India imports so much soy oil, particularly from Bangladesh, as we also heard from Post.

Cargill representatives also expressed an interest in taking part in IGTC committee meetings and asked for a follow up on particular committees and priorities.

Meeting with Shri Ashwani Kumar, Joint Secretary, Plant Protection – Ministry of Agriculture and Farmer's Welfare

The Joint Secretary was interested to hear about the work of IGTC, particularly on e-Phytos. He mentioned that India was moving towards an e-Phyto system and that he would be discussing the Indian system at the next meeting of the IPPC in South Korea in April. IGTC expressed a strong interest in hearing more about this and the Joint Secretary and his staff were very pleased that IGTC was keyed into this issue and that Indian members of IGTC were potentially involved.

As predicted by FAS, after IGTC's overview of their work and the discussion on e-Phytos, the discussion turned to the MB issue and the meeting on the issues that IGTC took part in on Monday, January 30. The Joint Secretary almost immediately pivoted to the mango issue when the discussion turned to phytosanitary issues. This is an area where he is likely getting a lot of pressure from his superiors. He explained that India does not object to the requirement that mangos undergo irradiation, but that they wonder why the U.S. does not simply allow for MB treatment for pulse shipments before they leave the U.S. He also stated that his office felt that MB was perhaps not as dangerous at the irradiation treatment that mangos had to undergo. There was definitely some confusion in the room as to what irradiation treatment actually entailed. Some of his staff clarified that the Joint Secretary was really trying to ensure that all food



products are safe for human consumption.

He also stated that GOI would be happy to accept an alternative treatment to MB if the U.S. government would provide proof that an alternative method would be just as effective as the MB treatment. He said that they have been working with the Canadian government and that the alternative Canadian method had been approved by GOI and that Canadian imports of pulses would not be impacted. He expressed a hope that the U.S. would invite Indian scientists to come to the U.S. and see our methods firsthand so that they can certify their safety.

This is clearly an area where continued discussion between USG and GOI is needed. The Indians do not like being told that MB is "unsafe" in the U.S. and are pushing back where they can, in this case conflating irradiation of mangos with something that would potentially be unsafe. Based on discussions with industry during the G2F2 conference, it seems likely that GOI will relent on the MB standard simply because they have to, but the mango issue is likely to be used in other ways against USG and U.S. exports.

Thursday, February 2 – Friday February 3 Global Grain Food & Feed Conference

The Global Grain Food & Feed Conference (G2F2) was an extremely well-organized and informative two-day session, attracting high-level leadership of the grain and oilseeds trade in India. Hosted by the Solvent Extractors Association (SEA), the speakers and roundtable discussions featured the top representatives of the oilseed, grain and sugar industry in India. It was thanks to SEA that the IGTC was able to take the stage twice: once to review the speakers' interventions from the *inaugural session*, and once to present IGTC priorities during the session on *new opportunities in the agri food sector*. The audiences were around 200 people and 40 people respectively. During the second session, there were important synergies with presentations from the USDA FAS, as well as certification and inspection company SGS. SGS in particular highlighted how the concept of "quality" is changing, traceability is higher than ever before, and the misperception that control of the entire food/feed chain ensures increased safety.

Overall the G2F2 saw many topics covered, the most important discussions had to do with India's expected domestic production, the growing need for imports, and how industry can work together to get past the more protectionist tendencies of the GOI. There was an irony that many of the same speakers had likely advocated and profited from those same protectionist measures, but between the growth of India's population and the decline in production in key commodities, the speakers and panelists all agreed that a change was necessary and that it would be needed soon.

Market Highlights: Soybeans - The 2016 oilseed crop was better than expected with 1.2 to 1.4 million metric tons (MMT) more soy oil produced this year than last year. However, domestic production is still well below domestic needs for soy oil and that soybeans in India are significantly smaller than U.S., Brazilian and Argentinian seeds. There is a debate amongst SEA members about lobbying the government on GMO soybeans. Most executives favor letting farmers decided what to grow – including GMO if they want. With lower yields, due to poor quality, there is a need to apply newer technology to increase productivity – that's how you



double farmer income but there is no clear plan from the Government – just slogans

Wheat – Production was rebounding in 2016-2017. While India would likely end up importing over 4 MMT of wheat by March 2017, there was an expectation that imports would not be necessary to hit 2017's goals. Domestic wheat millers had been pushing for more imports and higher quality grain, and the Food Security Act may force government to import wheat. Private trade is providing a better price for domestic farmers, another argument for keeping the government out of the market as much as possible.

Pulses – 2017 was expected to see a bumper crop for pulses, but the Indian government has set the Minimum Support Price (MSP) too high and pulses are selling at less than MSP. The SEA had asked GOI for permission to allow farmers to sell at a lower price on the open market, but GOI has refused and has been buying pulses at MSP. There is strong concern that GOI's actions will make Indian pulses non-competitive with imports.

Future of GMO – Almost all the panelists who discussed GMO crops agreed that sheer force of need would make the Government adopt a more open attitude towards GMO. Farmers need to increase yields as more people move to the cities and fewer farm. More than one speaker expressed the opinion that within 2 years the Government would flip on GMO. This may be optimistic but almost all conversations I had felt that GMO acceptance was simply a matter of time.

Amit Sachdev, U.S. Grains Council Representative, Southeast Asia

Mr. Sachdev met with us after an introduction by Rakesh Dubey of Monsanto. USGC has lately been heavily engaged in encouraging ethanol exports from the U.S. to India. Mr. Sachdev also felt that there was strong potential for the exports of Dried Distillers Grains & Solubles (DDGS) from the U.S. to India for animal feed.

Currently, due to both religious restrictions and the ban on biotech, India's livestock mostly eats food waste. Farmers and industry both realized that this is not a long-term solution, is potentially dangerous, and impacts the quality of Indian dairy and chicken. India is a major beef (buffalo meat) exporter and farmers do not want to risk losing market share. Combine that with the soon to be lifted ban on imports of chicken from the U.S. and Indian farmers will need to provide better feed for their livestock. He believes DDGS can easily be imported into India without a major change in GMO restrictions.

Mr. Sachdev was less optimistic about a quick adoption of GMO products in India. He did not think 2 years was a viable option, and he pointed out that any GMO products will have to come from India first, due to the way that Indian society views multinational companies. Until domestic GMO products can be approved and produced en masse, he does not see widespread acceptance coming quickly.

Saturday, February 4

Tour of Food Corporation of India Public Distribution Warehouse

USDA FAS provided a tour of a of Food Corporation of India (FCI) Public Distribution



Warehouse. The warehouse was one of the largest of its kind in India, providing subsidized wheat and rice through multiple GOI welfare programs, including the Food Security Act of 2013 program which guarantees a base amount of wheat and rice for any Indian citizen at or below a certain poverty level - close to 70% of the population.

The FCI facility was exceptionally clean, well maintained, and efficient. It is not a modern warehouse, and features no silos. Wheat and rice are all stored in bags in different sections of the warehouse, and the bags are occasionally tested for pests and quality. If pests are discovered, fumigation happens right there in the warehouse. Upon our own inspection, we found clean and healthy, if not high-quality, wheat and rice. The FCI facility director claimed a loss of less than 3% of product due to pests or spoilage, but our USDA guide, Dr. Santosh Singh, explained later than the number is not reliable and that there is probably much more leakage onto the black market than expected. Additionally, he pointed out that in India, even spoiled or rotten products can find a market. Still, as this facility was in the national Capitol and likely inspected by the GOI often, it was likely more well-maintained than most. Dr. Singh expressed the opinion that more rural facilities would look less efficient, clean and safe.

Monday, February 6

Nitin Puri, Senior President, Yes Bank

The IGTC heard how Yes Bank was founded by Rano-Kapoor, an ex-Rabobank official, and shares the 'same DNA' as Rabobank, working to conduct agricultural research and ultimately contribute towards agricultural development practices in India. Puri's team consists of 30 practitioners, holding both concrete experience 'in the field' as well as contributing towards Yes Bank's place at the cutting edge of agricultural research.

Yes Bank is a trusted partner at the Indian Government and works on research and advisory services relating to a number of projects. Coarse grains are integral to food security in the country. It was noted that the phytosanitary situation is becoming more predictable as corporate entities are increasingly owning supply chains.

The relationship between Yes Bank and the Ministry of Food Processing is an important one – work is currently underway to add value to apples and citrus fruits through processing and stimulating 'back end investment'. Elsewhere, it was noted that organic production in India is ripe for further investment and certification could bring increased market opportunities for Indian producers.

Mumbai

Wednesday, February 8

Adam Branson, Senior Agricultural Attaché

With extensive experience in China, India, Mexico and other locations, Mr. Branson was able to inform the IGTC about priorities in India with an international perspective in mind. Recommendations were made to use the IGTC as a vehicle to facilitate information exchange in and across its member associations including by organizing visits for members from key importing countries to key exporting countries, and vice-versa. Outreach with the CGIAR system was also



pointed to as a useful opportunity.

It was noted that there is huge potential for Indian agriculture to become more productive and economically developed if market transparency was implemented and market signals were enhanced. The FAS feels it has an important role to play in information sharing on grain markets in India and can act as an independent and impartial source of statistics.

Finally, Mr. Branson noted the significant work by NAEGA in the global grain trade, one example being cooperation with APPAMEX on the CME Group integration of Mexican grain companies and risk management techniques.

Malaysian Palm Oil Networking Seminar

This meeting was jointly organized by IGTC members SEA and saw high-level government and industry leaders from both India and Malaysia attend. The high level speaker was the Malaysian Minister of Plantation Industries and Commodities, YB Datuk Seri Mah Siew Keong. A welcome was made by the President of the SEA, Atul Chaturvedi.

The overall aim of the seminar was to secure the commitment to have 50% of India's requirement for palm oil imports coming from Malaysia. Aside from this, Mr. Chaturvedi highlighted the enormous purchasing power of his country; its deficit of 15 million tonnes of edible oil; and the unique value of the SEA in providing a market database for its members, as well as a convening venue for the whole gamut of industry actors.

Thursday, February 9

Dr. B V Mehta, Executive Director of the Solvent Extractors' Association (SEA)

This bilateral meeting was central to the whole purpose of the IGTC's visit to India, providing an opportunity to deepen the relationship with key Indian members. The following information was gathered:

- SEA has around 900 members (of which about 550 solvent extraction plants having a combined oilcake/oilseed processing capacity/ 30 million tonnes Funding structure:
 - 1. Membership fees ordinary members (annual fee of 125USD) and associate members (annual fee of 100USD)
 - 2. One-off investments from members
 - 3. Ministry of Commerce (ad hoc)
 - 4. Conference revenues
- SEA felt this was the first outreach the IGTC has conducted with SEA. IGTC has just been 'paper in a folder'. There was a perception that IGTC was only focusing on grains and pulses, not oilseeds. SEA does not feel like an 'active' member at present.
- SEA would reflect on full IGTC member dues payment at a future date following further IGTC engagement.
- Interested in IGTC Policy Teams but requires a formal communication inviting SEA experts to be involved.
- IGTC needs to formulate evidence specific to SEA about its value proposition, suitable for presentation to the SEA Board of Directors.



- SEA already has good links with IGTC members CAPECO, and CIARA-CEC.
- In-person meeting with IGTC in Rome/London is interesting for them as a good next step for engagement. They would however require funding for travel.

Friday, February 10

D N Pathak, Executive Director of the Sovbean Processors Association of India (SOPA)

Another of the most important meetings during the IGTC visit to India. The following information was gathered that will help improve engagement in India:

- SOPA's members are 'all-Indian'; 600 members representing processing industries, exporters, buyers, brokers, surveyors, analysts as well as farmers.
- Funding structure: Member dues from farmers, not all are contributing. Seed production unit on-site. Ad-hoc funding from government.
- Feels that this was the IGTC's first outreach effort with SOPA. Sees the IGTC's meeting at SOPA HQ in Indore as a first step and will evaluate funding commitments over the next year.
- Acknowledgement that SOPA is in a position to contribute financially towards IGTC member dues at present.
- Agreement with IGTC mandate, themes in common with IGTC: agricultural productivity, CODEX reform, proportionate phytosanitary requirements, electronic trading documentation.

Recommendations

1. Policy files and market access

NAEGA/IGTC's future engagement with the Government of India and local stakeholders should focus on three four areas:

- **a.** Export of Pulses
- **b.** Export of DDGS
- c. Dialogue on Low Level Presence
- d. Sanitary and Phytosanitary Standards

Exporting U.S. and Canadian Pulses to India – In the near term, the largest opportunity for GRNOS exports to India is pulses. Even if Indian production hits it's expected record crop this year, they will still need to import pulses to meet the growing demand from an expanding population. While there is a current impasse between the Indian and U.S. government's over the required use of methyl bromide fumigation for most agricultural imports, meetings with the Government of India and discussions with local industry on this mission indicate that the GOI is trying to use the MB issue to push USG to compromise on inspection requirements for Indian mangoes. Where possible, NAEGA should encourage USG to engage with GOI on the mango issue to allow the Indians room to reinstate the exception that has allowed U.S. exports of pulses to receive MB fumigation upon arrival at port in India.

Export of DDGS – Following our discussion with USGC, research into the feed situation in India indicates that there is a potential growing market for DDGS from the U.S. NAEGA should partner with USGC to perhaps arrange tours of DDGS facilities in the



U.S. for Indian buyers and GOI representatives.

Dialogue on Low Level Presence – Currently, India has no Low-Level Presence (LLP) standard. Zero tolerance for any presence of unauthorized biotechnology event is the official positon of the Government, mainly for political reasons. As mentioned in the summary, during the mission we heard the view from some that the "zero tolerance" policy is often unofficially circumvented for example, with shipments of certain commodities from countries that aren't "officially" exporting GMO products.

As India is already allowing the importation of biotech soy and canola oil, and as it moves slowly but inexorably towards the necessitation of both import and domestic production of biotech food & feed crops, NAEGA should begin working through IGTC and IGTC members in India could be to-engaged with local industry and then the Indian Government to advocate for the adoption of an official LLP standard for the country. Notonly This will this make the slow adoption of biotech food & feed easier for both importers and exporters. it will allow NAEGA to use local industry to advance the issue. Without domestic buy-in, any advance on LLP will come much slower and keep U.S. GRNOS out of the country for a longer period.

Sanitary and Phytosanitary Standards – India's MB requirement is just part of the reason it is difficult for U.S. GRNOS to gain access to the market. Another is the long list of pests that the U.S. needs to certify are not present in shipments to gain access for U.S. wheat. As NAEGA & IGTC seek global harmonization on SPS issues, they should work with IGTC members in India to bring the GOI into discussions about science-based standards that will allow Indian farmers to compete as well as facilitating market access for suitable exporters allow American farmers access to the Indian market.

2. IGTC Global outreach programme

IGTC follow up should be as follows:

IGTC members: Solvent Extractors' Association (SEA) and Soybean Processors Association of India (SOPA)

- Engage in SEA AGM in September, either to be present as a presenter, or ask IGTC members who are present (e.g. CIARA-CEC) to promote value of IGTC membership;
- Seek immediate opportunities to report on IGTC visit to SEA in the grain trade press;
- Contact mutual partners in global grain trade to raise awareness of IGTC visit to India: CIARA-CEC, CAPECO and ITC;
- Send formal communication asking for SEA participation on IGTC Policy Teams. (e.g. Dr. Praboldh Hald, President of food scientists of India, is the best contact to potentially represent SEA on the MRL Policy Team);
- Seek advice from IGTC's GHS Policy Team members on the castor issue that has been prioritized by Dr. Mehta.



3. Partners:

- NAEGA-IGTC consider a project to look at which banks follow the same 'DNA' as Rabobank, i.e. like India's Yes Bank;
- Follow up with Cargill India public outreach team providing more details about IGTC Value Proposition;
- Approach IPGA as an IGTC member association;
- Work with CII for increased outreach in the region.

4. Learn from Indian approach to organizing conferences, noting the use of:

- Professional MC, introducing speakers, smooth wrapping up of each presentation before moving onto the next;
- Welcome of high-level guests, meeting in-person pre-conference;
- Telephones and computers switched off, 2 people out of 150 using phone at any one time;
- Short, sharp, high level meetings: 2 hours of talking;
- Welcome music, keeps attendees alert;
- Using event to launch IGTC products/outcome literature.

Attachments

- 1. G2F2 Agenda
- 2. List of Contacts
- 3. IGTC presentation at G2F2 conference