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HPQ - Hewlett-Packard at Wells Fargo Tech Transformation Summit

EVENT DATE/TIME: APRIL 03, 2012 / 6:35PM GMT



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## PRESENTATION

**Jason Maynard** - *Wells Fargo - Analyst*

Welcome back. So we are very happy to have from HP Biri Singh. Biri runs the cloud services group, and we're going to talk a little bit today about what HP is doing with the cloud, and to give you guys a little bit of an overview, we're going to get a good little 10, 15 minute update and walk you through a little bit of a deck, and then we'll do some Q&A. Thanks for coming. Appreciate it.

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**Biri Singh** - *Hewlett-Packard Development Company, L.P. - SVP& GM, HP Cloud Services*

Thank you. Thanks for having me, and thanks for taking the time. My name is Biri Singh. Am I running it off here? Here we go. So I will spend some time on what we are doing in the cloud relative to HP and walk you through sort of a broad strategy, and then specifically some of the newer things that we are bringing to market here pretty soon. I'll talk for about 10, 15 minutes; I think we're going to chat, happy to do Q&A after that.

Let me get started with sort of our standard fine print, you've all seen that, obviously, so I'll cover that. So let me get started here and talk about what cloud means relative to Hewlett-Packard. Quick background on myself -- I've been at HP for about a year. Before that I did three years at IBM. I helped start up the cloud business there. IBM acquired one of my companies, then a bunch of startups before that, and I cut my teeth as a product manager at Nortel many years back. So 20 plus years in IT and infrastructure.

So what we have been working on at HP in terms of cloud, let me help frame it for you and sort of how to think about it; I'll spend a few minutes on this slide. So we've had private cloud as an offering in the market for two or three years. So we've done converged infrastructure in terms of service storage networking. We're sort of -- tend to lead that. We've been -- I think we powered 4 out of the 5 search engines; we sell to 8 out of the 10 top consumer Web 2.0 sites. We power companies like Facebook and others in terms of scale-out infrastructure, so we sort of tend to be pretty good at understanding what scale-out and what service storage networking means.

We invented the category of converged infrastructure. A lot of the market has taken to that, and we're sort of using that as a way to frame from an infrastructure background how we can sort of do cloud.

So with that, what we did is we took private cloud -- it is offering -- what we call cloud system, and it's really meant for exactly what it is. It's cloud in a box on premise. We sell this as a product, we deliver it through our services teams, and the whole idea is catering sort of a CapEx view of life. So you want to stand up a cloud, you're an enterprise, you can essentially stand up an HP cloud system in a day and start building and running a bunch of cloud-centric apps.

The piece in the middle that we call private managed cloud is really a set of managed cloud services. This is part of what we do from our EDS/ES business, where we actually go in and will run hosted clouds for our customers. So it's a services model, and here it's essentially our CapEx as a service provider, HP is running this, and it's the customer, your OpEx. On the journey from CapEx to OpEx is sort of the offering we've got.

And here we tend to do a lot of work, in not just setting up basic infrastructure environments for customers, think of it setting up a dev test environment for three months to burst extra capacity into or actually running, let's say, exchange or mobile management on the behalf of customers. Again, it's part of our services piece. So this is consulting services.



And then on the right-hand side for you is the HP public cloud, or HP cloud services. We've actually got this in private beta for the last few months. It will be launching soon in public beta, and this is very much designed to sort of go solve the market need for infrastructure as a service. But it's a lot more than that, and I'll talk to this in a little bit. We are actually building out not just infrastructure, raw compute and store, we are actually offering a platform for developers and enterprises and ISVs. We are offering a set of -- an ecosystem in a marketplace as well, and I'll spend a few minutes there specific to the public cloud.

But what I want to sort of cover here in the buildout is a couple of things. When we talk about hybrid delivery, what I'm really meaning to say here is -- first of all, we don't -- I don't refer to the term hybrid cloud. Hybrid clouds are the customers' environments. Customers deal with hybrid environments. As an IT vendor, it's our responsibility to actually give you solutions across the environment. So when we say hybrid delivery, what we are really talking about is providing a set of infrastructure application transformation and information solutions across private cloud, managed cloud, and public cloud. So you can essentially consume services across any environment.

The design point really has been across this, you know, build for a future that says mobile devices, bring your own device in the workforce out of the Web 2.0 experience, the device in HTML 5 become the consumption end point, right? And how you deal with applications of the future are really bite-size applications that are sort of informed through our social media experience. So we are going to start dealing with getting things done on our devices using sort of bite-size applications, and those are relevant for not just our search, and following someone, or tagging someone, or paying something, but also there's a whole bunch of enterprise applications following that model as well.

Number three is the back end of all of this is all cloud, so with your device, it's plugged into a set of cloud services, whether it's that Apple iCloud, or the HP public cloud, or Samsung's cloud, whole idea is your device, your identity is secure, and all of your stuff in the cloud. Both work and home.

And then finally, the devices that we use, whether it's a tablet or an Android device, or an IOS phone, or something else, there's a whole bunch of data subsystems that actually interact with the device and you. So the GPS, the accelerometer, the search, the payment, all of these are subsystems built into the backend. So having the intelligence, having the analytics to actually be able to manage and see what's happening on that is really important.

So device front end, cloud back end, a bunch of applications -- next generation applications in between, and analytics on the top to sort of make sense of it. That's also the way the design point we have thought about when it comes to sort of what HP is going to build for.

If you were to take that on the public cloud side and actually move that into the enterprise, what enterprises and CIOs are looking for is, they are saying, I want solutions that are open, and I want you to be able to talk to me about not just infrastructure but applications as well, and then now information, vis-a-vis analytics. So with our, for example, Autonomy and Vertica assets, we bring a lot of structured and unstructured real-time analytics to the table, as an example.

So I just wanted to frame for us, for you, what when we say hybrid delivery and we talk about cloud strategy for HP, what that looks like. Again, private cloud managed and public across, and then really an infrastructure application and information story that sort of builds up. That collectively is what we are calling the HP converged cloud delivery.

So that's a little bit about what we say -- what we mean when we talk about hybrid delivery. Let me frame this against a customer story, just to sort of tie it back and just saying, well, what does that mean against what customers look at? What I've got here is a stair step, what we'll call a journey that most enterprises, most service providers are taking today.

One is on the left-hand side, the first few steps are sort of a virtualization story. So you're a CIO, you virtualized 6 -- 70, 80% on a stack; you've got control of your environment; you've done a whole bunch of sort of standardization; and you're now able to automate a bunch of your infrastructure. Typically what you're looking to do next is now move on this journey that says, I want to become a self-service broker.

So what you will typically run into are scenarios where you are now trying to instantiate self-service infrastructure. You're than trying to go into applications, and then ultimately into this full-fledged broker model. And the whole premise there is you've got a production environment, you've



got a dev test and a DR environment, and what you're really trying to do is outside of that, make it completely consumable or elastic. That's the whole definition of services broker.

But what ends up happening is most people arrive at cloud or implementing clouds in one of two paths. You have either come through the virtualization story, which is here, which is a very unique way -- you're managing sort of blocks, your managing VMs. The other side of it is you actually implement a cloud. And the cloud environment that's not built on virtualization is completely different relative to managing operations. You're dealing with sort of networking typology; you're dealing with security; you're dealing with availability zones. It's a very different type of infrastructure environment you have to manage for.

So what we have been sort of spending our time thinking about at HP is how do you sort of traverse this journey where you can speak to both virtualization and that path as well as implementing cloud services that are ready-made consumable? When I say cloud services, I mean browser-based, loosely coupled APIs, multitenant, self-service with elastic billing, as pay-as-you-go, as you want.

So that is sort of a little bit of the framing on how we see the journey, and so when we talk about getting to a services broker model, we are really aiming for the end point. How do you enable infrastructure and a certain set of applications and a certain set of information to be managed by the CIO in this environment? So that's a little bit about what hybrid delivery means relative to HP.

Let me talk a little bit about public cloud and specifically some of the sort of next gen services we have been building over the last year, and this is part of what is currently in private beta. So as I talk about moving from left to right, what we are really designing here is a whole stack of cloud services consumable through your device, through your browser, inside the firewall, outside the firewall, doesn't matter. Our aim is to kind of give you a full stack.

So let me talk about this slide here. We are building the HP cloud, our core infrastructure; we've actually built this on converged infrastructure, our server, our storage, our networking IP, our software IP, but we've also leveraged a whole bunch of open source, like open stack. So we've brought this cloud at scale, it's in private beta right now, has many thousands of nodes, scaling quite well. We've had tremendous response. We'll be going into public beta soon.

On top of this we are building, really, five things. And I'm going to sort of talk to it from your left. The first thing we are rolling out is what we call platform, platform as a service, if you will. When I say platform, I actually mean several things in there. Not only are we talking about a set of tools for developers, so an IDE multiple language support, a set of sort of corresponding services to manage those -- that effort with, but we're also building in additional value-add services, like database and analytics as a service. And we'll tie in a bunch of HP assets on this.

So platform really is a set of assets geared at the developer, not just sort of standalone developers or Captain Underpants from sort of different areas, we're talking about ISV developers and enterprise developers, people that are now building to this new sort of generation of consumption, which is all about mobile at one level; it's all about HTML 5 at another level. That's what platform is about.

The next piece is sort of bread and butter to any cloud operation -- basic hosting 101. Right? So the basics of how one makes money and cloud is you want to host as many workloads as you can at as high a utilization as you can. So this is about taking next generation SaaS companies and ISVs and hosting them on an HP cloud. And what I mean by that is partners are -- whether you are a Workday, or whether you are Zynga, or whether you are a small ISV, or whether you're a web app built in an enterprise, you're looking for a secure, scalable cloud architecture to build and run your application or your service on.

So hosting 101, I call this the ISV 2.0 model. All ISVs essentially have to certify themselves on a set of standard clouds. In the future we believe there will be a handful of clouds. There won't be tens of hundreds of clouds; there will be a handful of clouds at scale that have the wherewithal to run a global footprint. And I think ISVs will certify to those clouds like they used to certify DOS stacks, whether Windows, or Red Hat, or some flavor of Linux, or what have you. So there's all of you that says in the future, you have to plan for workloads that are cloud-centric architecture derived.



The third piece is our partner ecosystem, which ties to our cloud marketplace. So the whole idea here is if you're going to host a bunch of workloads and you're going to give developers, whether they are in an enterprise setting, an ISV setting, or a stand-alone or an SMB, you have to be able to give them tools to manage. More importantly, you actually have to be able to give them tools to be able to monetize.

So that comes from a set of third-party ecosystem partners as well as actually allowing them to get built on the marketplace. When I say marketplace, I actually mean you can go to an enterprise, and an enterprise can turn on its offerings and do chargeback or show back within its firewall as a sort of enterprise-centric marketplace, or actually a more -- the app catalog metaphor, which is literally you would go and download -- whether it's a stand-alone Workday application, or it's a widget that you wrote for metering/billing tool that you've tied to some SAP backend or Azora backend, as an example. So the marketplace truly is something we would curate and manage on the behalf of the HP cloud and our ecosystem, but can also private label into an enterprise setting.

And then finally, hybrid interoperability. I talked about this earlier on. When we look at this slide here, the ability to manage and securely orchestrate a set of services across a private cloud, a managed cloud service, and a public cloud service is really important. So orchestration for us, when I say orchestration, I mean managing bare metal environments, managing VMs, and managing application services becomes a really important part.

So part of what we are doing here is spending our time on essentially orchestration between private clouds and federated clouds. And that's all about APIs, and it's all about building a set of management tools on top of APIs that you can sort of really extend your cloud footprint with. We believe, as I said, there will be federated clouds, but the importance for the HP customer is for us to be able to show them a path that says as the new world emerges and net new applications come out, we've got a story that takes you from your legacy infrastructure and your existing apps to a modern net new set of tools and applications that you want to build for. And again, interoperability amongst clouds is a big deal.

So this is essentially the HP cloud services stack. As I said, it's built on HP gear. It's not proprietary, it's highly open. Our differentiation, or what we're really planning for, is the ability to deliver the service across the world with an SLA, meaningful quality of service metrics, and a secure cloud. And really designing it for what we call not just IT operations, which is where HP has tended to operate reasonably well in terms of hardware and software and our converged infrastructure piece, but also what we call this next generation makers, or application builders or developers, and giving them a progressive set of tools is really where we have sort of spent our time focusing on.

That's sort of a quick overview on what HP cloud is. Jason, I'll sit down and talk about a few things.

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## QUESTIONS AND ANSWERS

**Jason Maynard** - Wells Fargo - Analyst

Yes, please do. Thank you. That was great. I think -- the first thing let's kick off a little bit about on the public cloud, because I think that's -- it's a real interesting area for you to go. And there's obviously a lot of established folks in this market right now.

Maybe what we'll do is will start at the bottom of the stack at -- at the infrastructure level, we can work our way into the platform pieces and -- call it the middleware runtime components. But how will HP differentiate against, obviously, something like an Amazon Web services, or perhaps something like what Microsoft is doing with Azure. What's the benefit to the customer, if you were going to walk in and tell us -- go HP cloud versus one of these others?

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**Biri Singh** - Hewlett-Packard Development Company, L.P. - SVP& GM, HP Cloud Services

Well, Azure is actually a more platform than it is -- it's getting into hosting now, and I think they kind of got that sequence backwards. But I think we've all -- they've got the luxury of being able to work through that, and they will. I think they'll do a fine job of it.



I have a tremendous respect amount of respect for AWS; they've clearly pioneered this space as we know it, but they've been at it for six years and just growing like a rocket ship. I think our design point is we are actually bringing to market this quote/unquote stack. At infrastructure level, the world has sort of moved very fast past this notion of just standing up VMs.

There's a whole bunch of service providers and telcos around the world standing up basic clouds. And they have got a choice of architecture, or choice of infrastructure that they want to. We are working with a bunch of them to actually offer them private labeling our quote/unquote cloud stack, or work with them to actually enable it through our services and kind of our broad footprints.

So we'll go to market with a lot of these service providers locally in market in their geos. And I think that's an important piece. My point there was -- the notion of just standing up a VM for raw compute is kind of done. And we think AWS, and Rackspace, and a bunch of telcos, and obviously us and a few others are going to sort fill that world quickly.

But the real market growth or the real opportunity is now that you've got an environment, what can you do with it? Is not just about standing up compute. Raw infrastructure really has been a proxy for standing up dev test applications. Most developers stand up their apps, mobile apps, but the enterprises have been using it to really do dev test and stand up applications.

Well, so that market is going to shift to a more secure quality service thing. So we think very quickly there will be an SLA-based model. There will be a secure model, and this notion of a business-grade cloud, which I don't want to sound sort of -- it's not marketing spiel, there really are actually some hard requirements and some certifications you've got to meet.

So I think it's really more about building for what's next above the VM that we've been spending our time on. So I think we're very complementary to some of the players there; we sell a bunch to AWS, we sell -- we work with all the partners. We just feel like the world of CapEx to OpEx -- in the next 10 years, we are probably going to see a migration of a good chunk of that. So we are just planning that HP has a footprint that allows it to sort of traverse the CapEx to OpEx.

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**Jason Maynard** - Wells Fargo - Analyst

So without putting words in your mouth, it doesn't sound like you're even trying to play in the Amazon Web services battle at that low stacking up to VM level. You're an abstracted layer above. Is that the right way to think about it?

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**Biri Singh** - Hewlett-Packard Development Company, L.P. - SVP& GM, HP Cloud Services

We are providing services above. We are going to offer infrastructure and at that level, quote/unquote, we will partner and compete with a bunch of players. But at a very fundamental level, I'm going to go try to stand up as many workloads -- as many of your workloads on the HP cloud as I can, and show you that it's a meaningful, safe, secure place with an SLA that allows you to sort of be pretty flexible. I want to provide you with a bunch of tools that give your developers and your IT ops folks a lot of flexibility in being able to manage that.

We don't think that need is being met in the market right now. So I do think we will see some overlap, but personally I think it's a massive market, and a lot of growth for a lot of partners.

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**Jason Maynard** - Wells Fargo - Analyst

The next piece -- we've got about five minutes left. So I'll ask this one question, then and we'll hit the audience. But I think it's super-intriguing -- the platform as a service piece. I am an old guy. I remember when HP bought Bluestone in the application server market and was going to make a run at being a runtime application server vendor, and was going to try and court developers.

And just to be frank --

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**Biri Singh** - Hewlett-Packard Development Company, L.P. - SVP& GM, HP Cloud Services

You can be frank. (Laughter)

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**Jason Maynard** - Wells Fargo - Analyst

-- HP hasn't necessarily had the DNA or the focus to go after developers. Just saying, the way like an IBM has, with WebSphere and even BEA and Oracle. So how do you sort of harness, if you will, the collective mass of HP, all your resources, and go get those developers? And what makes it different this time to go really scale and compete?

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**Biri Singh** - Hewlett-Packard Development Company, L.P. - SVP& GM, HP Cloud Services

Well said. So, look. The last time the words developer and HP were used in the same sentence was probably back in HP UX days, yes? And we certainly didn't do ourselves any favors with Web OS last year. So we've learned.

I think what's different, or -- we are not trying to be a radical, or I'm not assuming we're going to come out and try to be kingmakers of developers here. We have our work cut out. But what we focused on in the platform is trying to be as progressive with an open set of tools and really focus on building out a very rich set of bindings and APIs.

So I'm old-school in the sense that I believe code speaks, so we're going to publish the HP cloud API directory on our website, which gets -- turns on next week. And you can follow us at @HPcloud to see -- actually go look at it. But our belief is developers are all about time to code. So what they really care about is they want you to take away all of the complexity of standing up infrastructure, standing a bunch of services, and they want to get to work on their runtime. Whether it's Java, or Ruby, or Python, whatever. They care about standing up their application as quickly and efficiently as possible, and then getting paid for it. Whether you are standalone, a startup, and SMB or enterprise, that's kind of what they're there for.

So we're trying to invest our time in giving them the sort of tools through partners and through HP to be able to enable them there. And I think the way that's going to arrive at it, if you look at some of the other offerings in the marketplace that are trying to build an infrastructure and then a platform -- in the Azure case, it's kind of a proxy for .NET. So I'll simplify that one. Azure is all about .NET versus kind of everything else, so that's going to shake itself out in the marketplace.

But everything else is really now about how do you show a developer you can actually manage things like load balancing and auto scale? So if I'm a developer, I've written a Ruby app for mobile, and I've got 300 servers, and I want to scale quickly to 1000, because I see the app catalog and I see the demand coming, I want to be able to go into the HP cloud and quickly, on a sliding scale, be able to provision that.

I want to be able to tie in a GPS -- a mobile tag through simple geo and NAVTEK and not have to go out and actually pull the API. That's already available through either the marketplace or third-party service.

I want to be able to give you database as a service, my SQL and unstructured data, so whether it's Mongo or something else, or Cassandra, to give you a way to sort of scale out your database backend as well. I want to be able to give you analytics through Vertica or something else.

What we think will be different, and I'll leave it at that, for developers, is we are actually trying to future-proof a set of tools that are mostly all open, either open-source or through partners, some that we'll own and build out organically and inorganically, but then add a very rich set of services around it. I think the value that HP brings is we are not going to be a kingmaker of a particular language or a developer. We're just going to stand it up, give you a secure environment to sort of run and scale in. And that's where I think we'll learn where it will take us.



**Jason Maynard** - Wells Fargo - Analyst

We got a little bit of time left. So roving mics around here. We've got one on the left.

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**Fritz Nelson** - InformationWeek - Vice President, Editorial Director

Hi. Fritz Nelson with InformationWeek. I actually have two questions, but I also want to make one slight, I think, correction. At the risk of now becoming the Microsoft apologist, it's not just .NET. I mean, they've made a very public statement about being language agnostic. So maybe you want address that.

But my questions are, number one, it's a great to see you guys doing open stack. I think that is a great direction. You also have other competitors like Piston cloud on -- at least on the private cloud side. And so my question is, how are you going to do battle with them, these nimble guys who come out with these cloud-on-a-stick sort of platforms?

And the second part is, we've been writing a lot of stories at InformationWeek about how the cloud providers like Amazon are not necessarily passing on the benefits of Moore's Law to their customers. So the notion is, is it really that compelling from a cost standpoint over the long-term to move my workloads to the public cloud. I can do it good enough on the private cloud side?

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**Biri Singh** - Hewlett-Packard Development Company, L.P. - SVP& GM, HP Cloud Services

Okay, so three things. I'll leave the Azure comment. We can take that off-line. No worries.

Number two of, in regards to the -- actually I forgot number two.

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**Fritz Nelson** - InformationWeek - Vice President, Editorial Director

Piston cloud.

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**Biri Singh** - Hewlett-Packard Development Company, L.P. - SVP& GM, HP Cloud Services

There you go. So private cloud, so private cloud or cloud-on-a-stick. We are actually going to -- our private clouds is going to be on a stick. It's not just being defined by that. There's a lot of players in open stack, but if you actually look at the landscape, Amazon did a tie up with Eucalyptus; this morning Citrix announced its cloud stack, which it is basically open sourcing through Apache.

So there is a lot of different players in there. I think the real pointer there is HP has got a pretty decent footprint in enterprise, and delivering private cloud is what we've been doing now for three years. We are actually the top private cloud vendor compared against sort of a listing against Cisco, or IBM, or VCE and others. So we know a little bit about what the private cloud space dynamics are, and really it's about sort of distribution and delivery. So I applaud Piston for what they are doing. They're going to innovate, and they will get a bunch of customers. But private cloud is about standing up clouds that scale with an architecture that will kind of allow you to burst into a bunch of different clouds or into a whole bunch of other services.

So our approach is we want to give our customers a lot of choice, not just within public cloud but across the entire Spectrum of hybrid delivery. So I think right now, the more the better, because this competitive lens is really AWS on one side and VMware on the other. And that's how sort of we can tend to frame our playbook. What we are trying to figure out is what's the best way to serve HP's customers there.

So we will have cloud-on-a-stick, cloud-on-a-laptop, and the cloud, with that full stack available later on. It will be readily available on premise, through private as well as through public.



And then the third question you had about public workloads, private workloads, there's a set of workloads that are very optimized for the private cloud around security and data governance that will never go out into the public cloud. That's just all about transactions and security, and geographies and cross-border stuff. But there's a set of public-grade workloads, and I think bring-your-own-device is really changing that. Where it is changing the form factor of the -- from going from a system of record to a whole bunch of systems with engagements around a set of data systems that we use. And the mobile device, and they're changing that level of experience.

So I think it's more to do with both the types of workloads that are optimal for thousands of servers as well as how those applications are going to inform how we interact with information and the underlying application underneath it. So I think systems of record will always be there, but they're going to move away over time and become less relevant, and it's going to be more about systems of engagement through the different devices we have.

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**Jason Maynard** - Wells Fargo - Analyst

Biri, this has been fantastic. It's a really comprehensive offering that you guys are bringing to market. So thanks for taking the time today (multiple speakers)

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**Biri Singh** - Hewlett-Packard Development Company, L.P. - SVP& GM, HP Cloud Services

Thanks for having me. I appreciate it.

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**Jason Maynard** - Wells Fargo - Analyst

We've got to make sure everybody -- @HPcloud, follow them on Twitter.

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**Biri Singh** - Hewlett-Packard Development Company, L.P. - SVP& GM, HP Cloud Services

Follow us at @HPcloud. Check us out.

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**Jason Maynard** - Wells Fargo - Analyst

See what he's up to.

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**Biri Singh** - Hewlett-Packard Development Company, L.P. - SVP& GM, HP Cloud Services

Thanks so much.

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