

Transformation And Tradition In U.S. Aerospace and Defense Relations With The Mideast:

U.S. Government and Private Sector Perspectives

U.S.-GCC Corporate Cooperation Committee - Issue Brief No. 2 - \$3.00

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Introduction

The U.S.-GCC Corporate Cooperation Committee and its Secretariat, the National Council on U.S.-Arab Relations, are pleased to publish this monograph on *Transformation and Tradition in U.S. Aerospace and Defense Relations with the Mideast: U.S. Government and Private Sector Perspectives*.

Since the end of the Cold War, no other strategic sector of the American economy or national defense structure has had to confront as many demands for fundamental change as the U.S. aerospace and defense industries. The four authors who address the implications of these changes for U.S. national security and related interests in the Mideast have had long experience in the public and private sectors. Each has spent much of a lifetime helping to maintain a robust defense at home, enhancing effectiveness among our forward deployed forces worldwide, and increasing the credibility of military establishments among America's key friends and working partners abroad.

Generalists and specialists will gain much of value and interest in pondering the policy and related issues addressed in this monograph. The fact that they have become a major focus of national debate in a Presidential election year increases the likelihood that the phenomena examined and analyzed herein will remain in the forefront of U.S. policymakers' concerns regarding the Mideast and other regions for some time to come.

Among the many issues that the authors address are the following: the impact of down-sizing and reconfiguration on matters pertaining to American and allied deterrence and defense capabilities, the transformation in the U.S. Foreign Military Sales Program, the changing nature of American defense assistance worldwide, the ongoing legal impediments to foreign defense sales, the revolutionary nature of foreign government investor involvement in the research, development, manufacture, and export of advanced U.S. military equipment, and the increasing need for more effective working relationships between the American aerospace and defense industries and the U.S. Government.

The Committee and the National Council publish this work in the spirit of contributing to the national dialogue on U.S. policies toward the Arab countries, the Mideast, and the Islamic world.

Mr. Burton Bacheller

Director, International Operations,
Boeing Company, and Chairman,
U.S.-GCC Corporate
Cooperation Committee

Dr. John Duke Anthony

President and CEO,
National Council on
U.S.-Arab Relations

Transformation Amidst Tradition In U.S.-Mideast Aerospace and Defense Dynamics: U.S. Government and Private Sector Perspectives

Moderator: Major General Larry G. Smith, Commander, United States Military Assistance Command

The regional specialists assembled to address the dynamics of continuity and change in the aerospace and defense sectors of American involvement in the Mideast bring a wealth of background and empirical experience to the task. As a lead-in to their analyses and recommendations, it may be of some interest and value to ponder the following factors in terms of their implications for key U.S. foreign policy objectives relative to enhancing regional deterrence and defense capabilities. Little known outside defense circles, and widely misunderstood among many in the foreign policy community, these factors, more than may be apparent at first sight, determine much of what the United States can and is likely to do on matters pertaining to war and peace in the Mideast and elsewhere. They also, for better or worse, shape much of what the United States is *unlikely* to do in addressing the kinds of regional and bilateral defense challenges examined at this year's U.S. Mideast Policymakers Conference.

Consider, for example, the strategic military and broader policy implications of the following:

- Unlike a number of other countries active in the Mideast arms market, the U.S. government does not make many defense products. The few exceptions are mostly developed or co-developed through government involvement in industry.
- The ending of the Cold War and the dismantling of the Berlin Wall changed things not only in the Middle East but all over the world. In the United States, America's armed forces are now about 40 percent smaller than they were, and the defense budgets have shrunk. Moreover, U.S. defense industries have undergone a substantial consolidation.
- What many regard as impediments to defense trade are viewed by others more as frictions of one kind or another – such as licensing delays or prohibitions, restrictions on releasability, long production lead times – that surface in the pursuit of military sales in an increasingly complex environment. Whether frictions or impediments, it is generally conceded that American arms manufacturers are bereft of many of the marketing benefits provided defense firms by the governments of other countries.



Maj. Gen. Larry G. Smith

Commander, U.S. Army
Security Assistance Command

General Smith has served in the United States, Europe, Vietnam, and Saudi Arabia. Significant assignments include two tours in Vietnam in U.S. cavalry units, command of armored cavalry troops in the United States, command of a tank battalion in Germany, and command of a tank heavy brigade in the United States. His most recent staff assignments include Department of the Army, Training and Doctrine Command (Fort Knox, Kentucky), and Forces Command, Fort McPherson, Georgia.



Source: Military Photos

Whether frictions or impediments, it is generally conceded that American arms manufacturers are bereft of many of the marketing benefits provided defense firms by the governments of other countries.

Certainly, for most U.S. international competitors in military sales, having policies successfully support an export-oriented arms industry has long been viewed as a national imperative.

- The domestic competition for scarce resources, in our country and elsewhere, remains a constant, but in this, America is not alone. This is also particularly and increasingly the case with regard to foreign markets. Numerous Mideastern countries that are seeking to enhance their defense capabilities are more and more having to confront the competing demands of growing populations and households that expect their fair share of limited government and domestic capital, with the end result in many cases being a dwindling percentage of national wealth allocated to the military.
- The conventional wisdom that increased competition is ordinarily associated with decreased prices remains true, on the whole, but can be misleading. Certainly, it is of little solace to consumers who view defense products, systems, and services, regardless of their price, as among the most expensive of any goods in the market place.
- In what reads like a typographical error, the United States in World War II built **50,000** tanks, a great many of which did not cost a lot more than the price of an elaborately engineered truck. Today, by contrast, American manufacturers produce only **120** tanks a year, and each one is expensive.
- Opportunity and obligation continue to go hand in hand. In the United States, arms transfers are based on the Arms Export Control Act, and are specifically linked in law to foreign policy objectives. All U.S. participants in the foreign military sales business have no choice but to abide by the law, and all perforce do abide by the law. To point out that other countries' laws are not as stringent or comprehensive in areas of marketing ploys, for example, is but to state the obvious. It underscores a reality that renders the task of devising and implementing an effective means of deterring aggression and defending the region more complex, problematic, and uncertain than would otherwise be the case.
- For far into the foreseeable future, stable political and military ties between the United States and its Mideast allies and partners will remain essential for building and maintaining mutually beneficial business relationships.
- Given that U.S. government purchases of arms have declined dramatically in recent years, it is an open question as to how to accommodate the need to maintain an ongoing robust defense establishment with the ongoing, albeit lessened, opportunities to sell arms in foreign markets in the aftermath of the ending of the Cold War. Certainly, for most U.S. international competitors in military sales, having policies to support successfully an export-oriented arms industry has long been viewed as a national imperative. While it has not yet come to that in the United States, the trend in that direction has been clear for quite some time. Companies that previously conducted the lion's share of their business with the U.S. government now readily admit to having a majority of their *new* defense relationships with foreign customers.

It is undeniable that these and other changes in the U.S. as well as international defense industries in recent years have various implications for U.S. interests and policies both at home and abroad. Nowhere is this more so than with regard to the region that annually draws such an interesting array of policymakers and foreign affairs practitioners to this conference: namely, the Mideast.



Source: Military Photos

Corporate Perspective: Dr. Joseph Moynihan, Vice President, Northrop Grumman



Dr. Joseph C. Moynihan

Vice President for Northrop Grumman Electronics Sensors and Systems Division for the Arabian Gulf

Dr. Moynihan is responsible for representing senior division leaders to their colleagues in senior positions within the government and military services of the Gulf Cooperation Council. Immediately prior to accepting these responsibilities with Northrop Grumman, he served as the Deputy Director for Research at the Emirates Center for Strategic Studies and Research.

- Several years ago in the aerospace world, there was an iron acquisition cycle. The cycle began either with the requirements of a military service as determined by the tactics office within that service, or it began with the basic scientific elements of industry. One can debate forever about whether aerospace acquisition is driven by the basic science of industry or the requirements of the combatant.

Policy Relevant Paradigms

- In reality, of course, aerospace acquisitions in the United States have been driven by both factors. But this paradigm has always been further developed to applied research. And if the applied research passed the common sense test, and if the appropriate budgetary means could be found, then U.S. government officials might give favorable consideration to supporting a new acquisition into a production role, assisting in advanced development, followed by prototype development, and, then, different production-related decisions would occur. Those different milestones would each be reviewed by government officials who would carefully consider the cost/value questions.
- After these milestones had been passed, and, after deployment, fielding, and experience, then, and only then, would an export market for the new acquisition be considered. At that point, those products, or some variant(s) of them, might be determined suitable to incorporate into a defense assistance framework that involved friends of the United States.
- Some years ago, in the early 1980s, Northrop Grumman decided to look beyond that paradigm. In so doing, it developed the F-20 aircraft. The F-20 was built *solely* for the export market. We failed in the effort to market the F-20 internationally, but I would like to argue that we were merely before our time.

The Imperatives of Customer Requirements and Investment

- If one looks again at the cycle described above, what one sees today is something quite similar but in other ways quite different. Regarding the latter, a new term has entered the lexicon of aerospace marketing. The term is “non-recurring expense,” or NRE, which means the customer helps pay the non-recurring expense of developing that product. And the customer is not always the U.S. government.
- Two current aerospace products designed exclusively for a foreign market are being moved towards the production stage with customer money.



Source: Northrop Grumman

in their development cycle. What is unique in these two cases is that there are no U.S. government sales on the immediate horizon, there is no government sponsor, and there is no government inventory of those aircraft.

- What this also means is that something revolutionary has occurred. Indeed, the aerospace industry is now in a situation where, more and more, it is having to design to customer requirements, whether the customers are the U.S. armed services or international customers, obviously in full compliance with the Arms Export Control Act and with full and appropriate licensing procedures and coordination with the U.S. government. This is an agonizing procedure. It is also one in which aerospace firms find themselves having to spend a great deal of money, time, and effort on a case-by-case review of a potential customer's requirements.
- Changes in U.S. government organization and practice (but not yet law) have already begun to reflect this transformation in the way that military sales take place. As a result, the concept of "assistance," as imbedded in the Defense Institute for Security Assistance Management (DISAM), which is participating in this conference, may no longer be as appropriate a term as it once was for describing the nature of the relationship that is built into international arms transfers. When foreign governments pay for the non-recurring costs associated with the development of new aerospace vehicles, one may rightfully begin to ask, "In which direction does the assistance travel?"
- Indicative of how far down this road we have already traveled is the fact that the United Arab Emirates (UAE) has been engaged in direct research with U.S. industrial laboratories on a daily basis for sometime now. The UAE's decision to do so was driven by a strategic consideration: to ensure that it would be able to obtain the defense product it needs.

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The UAE: Strategic Principles for National Decision-Making

Something else that the UAE has been doing, with little fanfare, is worth noting. In 1996, UAE Emirate Abu Dhabi's Crown Prince Shaikh Khalifa bin Zayid Al-Nahyan announced that four strategic principles would guide UAE national decision-making for the next 25 years. He talked first about preparation of the young. He also talked about rationalization and expansion of the gas and oil industry. The third principle was diversification of the UAE's export economy. The Gulf economies will continue to be great importers and the only way they can achieve a balance between imports and exports is to produce additional goods and/or services for export beyond oil and gas. The last of the four principles he enunciated was greater preparedness for Gulf defense, in both its political and military dimensions.

The United Arab Emirates considers a de facto coalition of the United States, France, and the United Kingdom to be its primary defense cooperation partners, and it enjoys robust relationships with each.

- In the political arena, cooperation has always been and will remain important. The United Arab Emirates considers the members of a de facto coalition of the United States, France, and the United Kingdom to be its primary defense cooperation partners, and it enjoys robust relationships with each.

The Damascus Declaration

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- But for reasons of sound national policy, the UAE and other GCC member-states also look beyond their three major Western allies to a nexus of enhanced defense and political cooperation with select fellow Arab countries. For example, immediately following the liberation of Kuwait in March 1991, the six GCC states, together with Egypt and Syria, forged a broad consensus, known as the Damascus Declaration, on the makings of a new inter-Arab order to replace the one that was shattered on August 2, 1990.
- A great many Westerners, and not a few Mideasterners, misinterpreted the Damascus Declaration to constitute the makings of a formal defense pact among the signatories. A reading of the text that was signed reveals no such intention. Rather, the Declaration posits a package of four incontestable principals, or core values, to which the signatories not only commit themselves to follow in their relations with one another but insist that any other adherents to the Declaration must also recognize and commit to follow.
- The consensual four-part centerpiece of the Damascus Declaration commits the signatories to: (1) refrain from interfering in each other's domestic affairs; (2) resolve any dispute that may emerge among them peacefully and diplomatically; (3) recognize the equality of sovereignty among nation states; and (4) accept and abide by the principal that sovereignty over natural resources must reside in the country in which the resources are located.
- Specialists will readily acknowledge that, stripped of their formalistic and deliberately bland and innocuous language, these four maxims cover the gamut of what the signatories believe lay at the root of the Iran-Iraq war from 1980-88 and the Kuwait Crisis of 1990-91.
- Westerners who have not taken the time to read the Declaration and follow the regular bi-annual meetings of its adherents since 1991 have themselves to blame for misunderstanding an important international dynamic bearing on regional defense issues and challenges that now exists but was not in place a decade ago.
- In and of themselves, both the twice-yearly meetings of these eight countries' leaders, and the strategic weight of the Declaration's stated ground rules for creating a Mideast that is more organized, stable, and predictable than the one that was reduced to ashes in 1990, constitute hitherto little noticed and appreciated inter-Arab contributions to enhanced regional deterrence and defense capabilities.

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Product Packaging: The Way Forward

With this as background and context for some of the more recent developments with implications for the sale of military items to the region, how can the American defense and aerospace industries package their products to be more attractive to Gulf customers?

- There are various ways to proceed successfully. One is to structure a proposal in such a way that it meets the requirements for any industrial participation offset. To this end, one will find it useful to include training advantages and opportunities for preparing the coming generation of leaders.
- If one can do this and also find a way to assist in the rationalization and expansion of the country's gas and oil reserves, thereby helping to diversify the export economy, the chances of success would be enhanced immeasurably.
- Certainly our competitors in Europe understand these points quite well, and are far more active in these realms than, to date, Americans have been.

What Role for the U.S. Government?

In light of the foregoing, what is the role of the United States government in the future?

- Certainly there will be the advocacy role of the Department of Commerce. The regulatory role of Commerce and other government agencies will also continue. And there will continue to be times when there is tension between the two roles.
- For the most part, this is unavoidable. This is because, for the U.S. government to be fully supportive of American companies means that the Administration has opted to do so knowing full well that the U.S. company will provide a better technology and overall package than its competitors.

What can one expect from the international scientific research community? Can one expect it to abide by U.S. security cautions, to adhere to agreements on the transfer of technology? Whether the substance at issue is information or something else, how can one realistically control technology transfer?

Research, Science, and Technology Issues

What can one expect from the international scientific research community? Can one expect it to abide by U.S. security cautions, *i.e.*, to adhere to agreements on the transfer of technology? Whether the substance at issue is information or something else, how can one realistically control technology transfer? And if such transfers cannot be controlled to the satisfaction of the technology inventor, what other mechanisms or instruments of policy might help to curb the frequency in which such unauthorized or uncompensated transfers occur? To what extent is enhanced enforcement of intellectual property rights and heightened compliance with patents and trademarks legislation likely to provide adequate redress in the course of addressing this challenge?

Quite apart from these and other considerations that affect the Mideastern countries' major foreign commercial partners, how can one expect the region's countries to act in support of their own needs, concerns, and interests?

As for meaningful frames of reference, most of the region's states aspire to reach the level of perceived sustainable development that Turkey and Egypt have been able to accomplish.

- A preliminary response to this question can be discerned in the light of what has already occurred and what is known of trends that have been underway for quite some time. For example, one can expect the region's countries to be more, not less, determined to pursue industrial participation schemes.
- These countries will also continue to look for shared relationships. As for meaningful frames of reference, most of the region's states aspire to reach the level of perceived sustainable development that Turkey and Egypt have been able to accomplish.
- These countries also hope to create some indigenous capability themselves and, eventually, to become our competitors.

As one confronts the future, it is an open question as to which of two possible kinds of relationships the United States will wish to have with the future aerospace industries of the Arab world. Will it be based on a mutually beneficial partnership, inclusive of shared technologies, that is the kind of relationship we enjoy in many places now? Or will it be one where, for whatever reason, we decide to cede the position of frontrunner to our competitors in Europe?

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Source: Military Photos

Corporate Commentator No. One: Mr. Ernest Jackson, Director of International Programs, Raytheon Company

In the run-up to the new millennium, there has been a lot of activity in Washington with regard to reinventing the Foreign Military Sales (FMS) Program. The end result will likely be a new cooperative system with three participants: the defense industry, the U.S. government, and, most importantly, the customer.

The defense industry is trying to come to grips with the implications that such a change may have for its near- and longer-term future. The newer concept as to how security assistance will be viewed from this point forward will unfold increasingly along the lines of traditional business between a customer and a supplier, with the added factor of the U.S. government retaining a major role in most defense sales transactions.

Enhancing Customer Responsiveness

There are great benefits to having in place a well-established foreign military sales system. One needs only to make it more responsive to the customer.

How does one do that?

In the defense business, there are all kinds of competitors ranging from European competitors to non-traditional competitors.

The defense industry is not just about cost and performance. Increasingly, the ability to wage coalition warfare has become critical for success on both the battlefield and in the broader world of geo-politics. The 1980-88 Iran-Iraq war and the 1990-91 Kuwait Crisis are two major cases in point.

On the U.S. side, much progress needs to be made in avoiding unnecessary tensions, misunderstandings, and dashed expectations between defense suppliers and would-be customers. A more concerted effort on the American side to be absolutely clear early on as to what is and what is not acceptable for arms transfer would help.

Financial Affordability and Components of a "Win Strategy"

Another area that needs attention is the continuing challenge of "financial affordability." A self-imposed limitation on the American side is that, unlike their competitors in other countries, U.S. banks do not finance defense sales, except in what can be argued is the "gray area" of dual-use technology.

There would be two major phases of a "win strategy". The first phase would encompass internal planning and approval. This would deal with Technology Access Control Plans (TACP), National Disclosure Policy (NDP), Memorandums of Understanding (MOU), and licenses.



Mr. Ernest Jackson

Director of International Programs, Raytheon Company

Prior to his current position, Mr. Jackson was Director of Army Programs and an Air Defense Systems Engineer at Raytheon. From 1984 to 1985, Mr. Jackson was Vice President for Systems Engineering at Potomac Systems Engineering in Annandale, VA.

Mr. Jackson was a U.S. Department of the Army System Coordinator from 1980 to 1984, and an Air Defense Staff Planner at Supreme Headquarters Allied Powers Europe (SHAPE), in Belgium from 1977 to 1980. Prior to his service in Europe, Mr. Jackson was Research and Development Coordinator at the Patriot Air Defense Missile System Project Office at the Redstone Arsenal in Alabama.

There are great benefits to having in place a well-established foreign military sales system. One needs only to make it more responsive to the customer.

Problems and unresolved challenges aside, there is no doubt that progress has been made between industry and government.

The key now is to institutionalize and fine-tune the numerous new ways in which the government is operating in the area of defense and aerospace production, sales, and exports. We must close the gap between the U.S. defense industries and the U.S. government if we are to enhance the prospects of American firms being more successful in the new competitive world of defense sales.

The second phase would encompass everything related to external customer sales. This would involve air and trade shows, purchase and acquisition, letters of agreement, direct commercial contracts, offsets, and financing.

From industry's perspective, there is no reason why American officials could not or should not take an advocacy role. As a military representative in uniform is one of the best sales tools one could have, this is one of the ways in which the U.S. government could assist the defense industry.

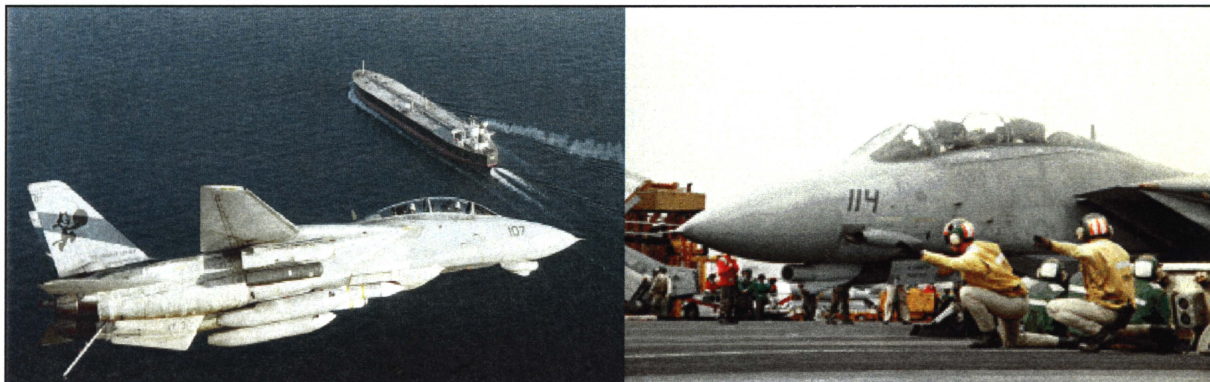
Problems, Progress, Prospects

Where are we today?

Problems and unresolved challenges aside, there is no doubt that progress has been made between industry and government. The mere identification and agreement by both sides as to what the major problems are is a form of progress. There have already been some successes. Some new legislation has been passed, and the issuance of waivers for non-recurring charges has been welcomed.

Additional good news is that defense export loan guarantee programs are underway, and there is a new conventional arms transfer policy.

The key now is to institutionalize and fine-tune the numerous new ways in which the government is operating in the area of defense and aerospace production, sales, and exports. We must close the gap between the U.S. defense industries and the U.S. government if we are to enhance the prospects of American firms being more successful in the new competitive world of defense sales.



Source: Defenselink, 2000

United States Navy Aircraft in the U.S.
Central Command's Area of Responsibility

Corporate Commentator No. Two: Mr. John Hambric, Director for International Marketing and Sales, United Defense

Phase one in defense consolidation here in the United States is largely completed. Most defense contractors will probably make some additional minor acquisitions, primarily in the technology sector, and perhaps in the computer industry in particular, in a bid to become more competitive.

Implications of Corporate Consolidations and Requirement Changes

Even before the process of mergers and consolidations tapers off in the United States, it is likely that one will see a great deal more of the same occurring among some of the giants in Europe. And once the consolidation is completed in Europe, or even before, one is likely to see some trans-Atlantic consolidations as well.

The U.S. Army's requirements have decreased significantly in the last few years. The threat is gone since the Cold War ended, and a lot of countries are diminishing their defense capabilities. Bosnia and Serbia have caused a surge in demand, however, in which sales of aging equipment and spare parts have played a role.

Governments are not willing to contribute anywhere near as much research and development (R and D) money in support of new armaments or other defense product lines as before.

At first glance, it would appear that trans-Atlantic consolidations might provide the means for companies to invest R and D monies. However, on further reflection, these or similar consolidations are unlikely to be a panacea.

Policy Challenges and Potential Benefits

Trans-Atlantic consolidations would pose several potential challenges to current practices. Not least would be in the area of national security policies, national export regulations, taxation and accounting differences, labor and employment law differences, and cultural differences.

On the other hand, if the kinds of policy and related challenges that these impediments pose at the present could be overcome in time, the benefits would be undeniable. The advantage would be fewer competitors, as well as more efficient and less expensive systems.



Mr. John Hambric

Director for
International
Marketing and Sales,
United Defense

Trans-Atlantic consolidations would pose several potential challenges to current practices. ... The advantage would be fewer competitors, as well as more efficient and less expensive systems.



Source: Defenselink, 2000