CEO GUIDE TO MOBILE WORLD CONGRESS

FEBRUARY / MARCH 2013

SUPPLEMENT





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Bigger, bolder, better!



A new, larger location for this year's Mobile World Congress is set to mean shorter queues and greater space to accommodate an expected 70,000 visitors. Although transport issues are expected and the new site will lead to some bewilderment among seasoned show goers, the event had outgrown its old location at the Fira Palace.

What I'm interest in, though, isn't the practicalities, it's what the speakers and exhibitors will be talking about, demonstrating and hinting at. It's clear that OSS/BSS is in the midst of a resurgent wave of interest. Most of us have seen the cycle before but it's always exciting to report on an industry in rapid transformation.

The last three months have seen a wave of M&A activity as companies rearrange their assets to meet the demands of CSPs more effectively. Given the investment challenges that CSPs face as they roll-out LTE and consider how LTE-Advanced might be deployed, OSS/BSS as the enabler of new business models and the creator of operational efficiencies is now more important than ever.

Billions of Euros are at stake, wrong decisions will be costly so the platform the Congress provides to learn from others will be even more important this year.

I'll certainly be trying to avoid making the wrong decisions – like potato omelette in a white roll for lunch – although I fear, even at the new venue, some things will remain the same.

Enjoy this Guide and the show!

George Malim

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SAP for Telecommunications helps communications service providers to go beyond Telco to deliver new services for the digital economy. Real-time solutions from SAP help CSPs make the world run better today - by providing them with world class enterprise applications, mobility solutions, real-time database technology, powerful analytics capabilities, and cloud offerings. SAP's long standing experience in co-innovating with over 200,000 customers in 24 industries, combined with a powerful M2M platform, provides CSPs with a strong partner to deliver M2M services. To learn more, please visit www.sap.com/m2m.



Expand your mobile horizons, it's Congress time

The 2013 GSMA Mobile World Congress, which will be held on 25-28 February 2013 at Fira Gran Via in Barcelona, Spain. Under the theme of The New Mobile Horizon, Mobile World Congress will showcase the mobile industry's leading companies, technologies, solutions and services across the exhibition. Here, VanillaPlus provides a guide to the event

At a new venue, this year's Mobile Congress will be hosted across 80,000 square metres of exhibition and hospitality space, attendees can visit pavilions focusing on various elements of the mobile ecosystem, such as embedded mobile devices, green technology, mobile cloud, mobile health and NFC and mobile money. The exhibition will also include country pavilions with companies from Austria, Belgium, Canada, Catalonia, China, Denmark, Egypt, Estonia, Finland, France, Germany, Ireland, Israel, Japan, Lithuania, Norway, Romania, South Korea, Spain, Sweden, Taiwan, Turkey and the United Kingdom.

"Mobile World Congress 2013 is shaping up to be the largest and most exciting edition ever," said Michael O'Hara, chief marketing officer of GSMA, the event's organisers. "The breadth of exhibition, educational programmes, meetings, events and networking opportunities coming up in February is unsurpassed, underscoring again why Mobile World Congress is the industry's must-attend event. We continue to add to this outstanding agenda and we look forward to welcoming more than 70,000 attendees from across the ever-expanding mobile ecosystem to Barcelona."

Keynote speakers for Mobile World Congress

During the four days of Mobile World Congress, the 2013 conference programme will highlight the impact of mobile on individuals and businesses – in developed and developing markets – across a range of industries. As always, the conference programme will challenge and educate attendees, providing essential insights on the latest technological developments, market opportunities, next-generation services, and devices which are shaping mobile communications.

Thought leaders and industry experts from the most influential companies within the expanding mobile value chain will be participating in more than 40 conference sessions at Mobile World Congress. These will include thought-provoking keynote presentations to interactive panel sessions, all addressing the most pressing topics in mobile









CSPs must think beyond their telco roots to capture the M2M opportunity

Jens Amail is senior vice president and general manager for Services Industries at SAP. Here, he tells VanillaPlus how he views the M2M opportunity for CSPs. The opportunities are massive, but to make the most of them, CSPs must think way beyond their telco roots and select the right partners to bring compelling propositions to enterprises and ultimately consumers

VanillaPlus: CSPs are all actively looking at the M2M space as a market that they can have a direct impact on. In your opinion, what are the key business drivers for M2M and how should CSPs position themselves?

Jens Amail: We have seen a tremendous mobile handset growth over the years, and today there are as many mobile handsets out there as there are people on earth, around seven billion. In addition to that we also have some two billion connected M2M devices, sensors and machines. And looking ahead, we will see an exponential growth in this area, dramatically expanding the addressable market for CSPs. Now our cars, home appliances and consumer electronics will come with connectivity built-in. We will see devices connecting in a multitude of industries such as oil and gas, retail, energy, public sector and banking – creating a hyper-connected world.

The first M2M business driver I see is making existing business processes more efficient. Take the Hamburg Port Authority as an example. Europe's second largest container port wanted to optimise the flow of goods and traffic. With very limited road and space capacity in and out of the port, they had to find creative ways to support further growth. Deutsche Telekom partnered with SAP to enable Hamburg's Smart Port Logistics project which outfitted trucks with tablets connected to a central system in order to keep track of available parking spaces, traffic conditions and transport orders – all in real-time.

The second driver is the capability of M2M to power innovation and the creation of new services. This has the potential to enable transformational business models, create substantial incremental value for enterprises and

a closer relationship with the consumer, improving the customer experience. We see many historically product-centric companies transforming into service-oriented companies. This is a dramatic shift for many industries.

Let's look at a typical product-centric industry like automotive, and the direction it is taking with connected cars. Here we look at new creative services, with the car interacting both with the driver and external entities. The car, basically acting as the driver's personal assistant, will provide advanced driving analytics and guidance on driving conditions. When recognising the driver the car will connect him or her to a personal cloud, displaying for example the latest emails and social network updates. Users are being able to locate their car and remotely activate car systems such as the climate control. In addition, we also have the M2M enabled communication between the car and external machines providing incremental value, for example traffic light control, scheduling for appointment parking as well as services and offers based on contextual user profile information.

General Motors as an example is creating what is essentially an iTunes app store for cars, an open development platform for apps enabling a whole new way to interact with their customers. This invehicle app store will include infotainment and app assistance to drive more safely or in a more fuel efficient manner, possibly decreasing the costs of vehicle ownership.

The possibilities to develop a stronger customer engagement model are very real and exciting to businesses. By introducing innovative services and expanding their value chain with partners, companies are now able to not only get a closer

We have seen a tremendous mobile handset growth over the years, and today there are as many mobile handsets out there as there are people on earth, around seven billion







JA: The reason why telcos will be the big winners in the M2M explosion is because they can fully exploit many of their core capabilities and assets. They have the experience with large-scale service delivery and, when you consider that the service they are delivering is up and running 99.99% of the time – the kind of availability that mission critical M2M scenarios will require - no one does this better than a CSP. Big data analytics, mass volume billing for micro services, and advanced management of large scale customer business data systems are additional telco strengths.

In addition, network connectivity and the global reach of telcos will absolutely be required for successful M2M scenarios. Global industries will have devices that must be connected in all parts of the world. Businesses in these industries will rely on a partner that has the operational expertise and a network to deliver a highly reliable cloud platform.

Finally, CSPs have built a strong arsenal of partners in terms of content, apps, specialised solutions and services and integration, as well as module and terminal vendors. Those partnerships are now being complemented to support further vertical solutions, to quickly rollout and scale up end-to-end services for M2M.

VP: Where are the immediate opportunities?

JA: I believe that there are opportunities for almost every industry to adopt some form of M2M scenario. CSPs would best be served by looking at the industries where they have the strongest footprint, allowing them to build upon their current strengths.

Regulation might force uptake in some sectors, such as in energy and automotive. For example, eCall in Europe, for automatic emergency calling in case of a car crash; the Contran resolution in Brazil, requiring all vehicles to be fitted with an anti-theft tracking device with the intention to reduce car thefts and lower car insurance rates; and in the UK the government's Committee on Climate is requiring smart meters to be installed in each residence by 2020 to support the overall goal to reduce the UK's greenhouse gas emissions. That's approximately 50 million new meters.

That said, some of the early adopter industries will probably be transportation, automotive, public sector, utilities and consumer products. SAP has worked with leading companies in each of these verticals to develop proof of concepts. One example being smart vending machines that communicate with the delivery trucks in order to ensure that the product is always fresh and

available to consumers when they want it, and to improve the efficiency of the distribution process.

Or take a look at Smart City projects that use sensors on all public transportation in conjunction with traffic controls to ensure efficient travel, and alerts to your car's control system in case of bad weather. Cars outfitted with sensors can communicate with parking spots to allow them to find the closest, available place to park. Sensors able to monitor vital signs of high-risk patients will direct emergency services to arrive before a cardiac event occurs, and smart metering sensors will reduce city energy cost and waste. These are just a few of the scenarios in some industries that I expect will lead the change in the M2M space.

VP: What are successful partner strategies for CSPs?

JA: CSPs will partner smartly in order to go to market in a timely fashion, deliver industry specific solutions and focus on their own core competencies to drive a successful M2M business. It will take the power of three to successfully go to market – meaning that telcos need to partner with both a network management provider as well as an M2M software platform provider.

VP: What do those partners offer?

JA: Network management is the layer that deals with the connectivity management and OSS/BSS integration and connects directly to the networks themselves.

The M2M software platform would for example include the app enablement framework, the data management portion and device management. This layer needs to work seamlessly with the enterprise backbone. This is where SAP can help CSPs by delivering a complete software platform for rolling out M2M services. SAP brings a complete suite of analytics, cloud, real-time processing, and mobility solutions. This is complemented by a scalable event agnostic charging and billing solution for B2B and advanced partnership management, plus our industry specific solutions and expertise within twenty-four different verticals.

Telcos should look for partners in the software industry with a successful track record in those verticals they want to go after with M2M services. The market has tremendous potential and many of the CSPs that I've spoken with expect over 5% of their revenue to come from M2M services in the short-term. Selecting the right partners will be a critical success factor for sustainable and profitable growth beyond telco.

CSPs have built a strong arsenal of partners in terms of content, apps, specialised solutions and services, integration, as well as module and terminal vendors





programme. Confirmed keynote speakers for Mobile World Congress 2013 include;

Kaoru Kato, president and CEO, **NTT DoCoMo**Vittorio Colao, chief executive, **Vodafone Group**René Obermann, CEO, **Deutsche Telekom**Franco Bernabè, chairman, GSMA and chairman
and CEO, **Telecom Italia Group**Suk-Chae Lee, CEO, **KT Corp**Gary Kovacs, CEO, **Mozilla**Susan Whiting, vice chair, **Nielsen**Stephen Elop, president and CEO, **Nokia**

In addition to insightful keynote sessions, the 2013 conference will also include focused track sessions exploring a range of topics such as applications, business strategy, cloud computing, connected living, developing markets, devices, mobile consumer marketing, mobile health, mobile money, next-generation technologies, NFC, OSS/BSS and social media, among other subjects. For more information, visit http://www.mobileworldcongress.com/conference

mPowered Brands

This year's Congress will again host the mPowered Brands Programme, which is designed to develop marketers' and enterprise leaders' mobile knowledge and to fast-track their use of mobile for marketing and consumer engagement. The mobile marketing and advertising programme comprises three elements: the mPowered Brands Zone, mPowered Brands Theatres and mPowered Brands Mobile Ambassadors. The GSMA announced that Nielsen has signed on as an mPowered Brands Supporting Sponsor and will be leading an mPowered Brands Theatre session.

The GSMA also announced that, due to high demand, it is expanding the mPowered Brands Zone on the exhibition floor; current exhibiting companies include Adfonic, AOL/AdTech, mAdvertise, Millennial Media, Telmap and Velti, among others.

As part of the mPowered Brands Mobile Ambassador Programme, Shelly Palmer, the prolific author and American TV personality who speaks on a wide range of topics relating to the challenges of digital disruption, is bringing his Digital Leadership Series to Mobile World Congress. Shelly Palmer will conduct bespoke tours during the event for business leaders who seek to rapidly get up to speed on mobile industry trends and opportunities to build an actionable roadmap for their business



Getting round the new site

Fira Gran Via is comprised of eight exhibition halls under a single roof. The layout begins with Hall 1, located at the South Entrance, and continues to Hall 8 and the North Entrance. In the heart of Fira Gran Via lies Congress Square, which is set to be a great meeting and gathering point.

Halls 1 to 7 are single-level spaces but thanks to a dual-level walkway connecting the halls, complete with moving sidewalks, escalators and elevators, there's plenty of space for 70,000 attendees to move along quickly.

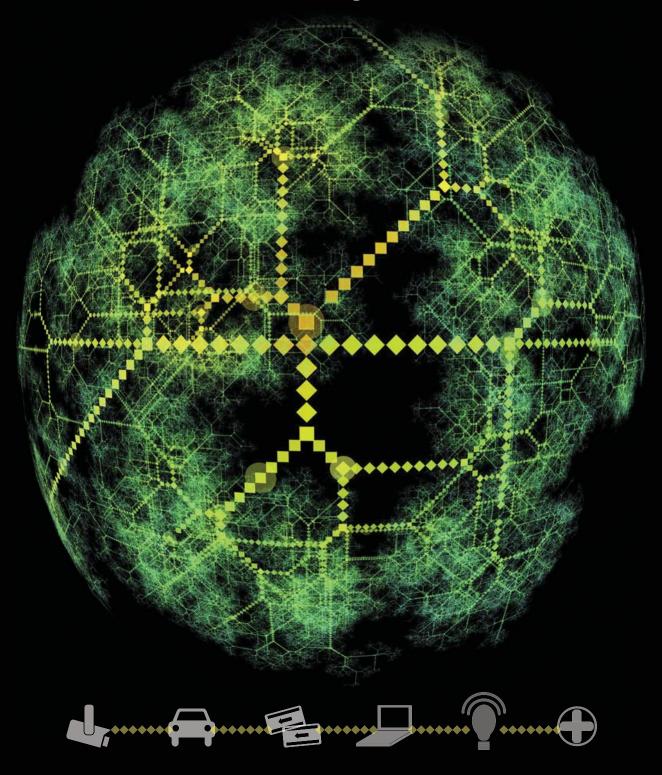
The only multi-level hall is Hall 8, which will host App Planet, mPowered Brands, our Ministerial Programme, Exhibition space (Hall 8.1), and theatre events such as our Forum Series, App Developer Conferences (ADCs), mPowered Brands Theatres and Partner Events (Hall 8.0).

Halls 1, 2 and 3 contain Hospitality Suite and Meeting Room space. Halls 3, 5, 6, 7, 8.1, and Congress Square will contain Exhibition stands. Hall 4 will hold our Conference programme.



blog-led website and quarterly magazine for machine to machine communications

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M2Mnow.biz

Profit from a world of connected devices





amdocs

Amdocs Stand 3B74, Hall 3

For more than 30 years, Amdocs has ensured service providers' success and embraced their biggest challenges. To win in the connected world, service providers rely on Amdocs to simplify the customer experience, harness the data explosion, stay ahead with new services and improve operational efficiency. The global company uniquely combines a market-leading BSS. OSS and network control product portfolio with value-driven professional services and managed services operations. With revenue of \$3.2 billion in fiscal 2012, Amdocs and its 20,000 employees serve customers in more than 60 countries.

www.amdocs.com



Ascot International Stand 5H54, Hall 5

Hybrid power technologies and energy power storage are theportfolio of innovation in high energy efficiency product designed by Ascot's Hybrid division over the last 20 years. More than 34 countries in Asia, the Middle East and Africa are successfully powered with low opex, low emission and respecting the environment. We offer a complete range of hybrid solutions for indoor and outdoor telecoms sites to satisfy all needs; the DCHPU Hybrid Power Unit is a complete solution with DC generators able to work in combination with solar, wind or any DC/AC source of power available.

Contact details: Dr Michele Greca, CEO and VP, ASCOT Tel:+39 0933 901192 www.ascotinternational.com



Astellia Stand C60, Hall 6

Astellia, a leading provider of probe-based monitoring solutions for the optimization of mobile network QoS and QoE, will showcase Nova 4G, its new generation of monitoring solutions, at the upcoming Mobile World Congress in Barcelona. In the world of 4G monitoring, Nova is taking a quantum leap, with its leading edge technology designed to improve mobile operators' business performance, optimize end-to-end data service quality and enhance user experience. Nova is already deployed at several European and North American Tier 1 operators to monitor, analyze and visualize their LTE network performance in real-time. Special Nova 4G demonstrations on iPad

during the MWC at stand C60, Hall 6 Contact: Esther Duval, communication manager Mobile: +33 6 84 99 31 06 email: e.duval@astellia.com

www.astellia.com



Comptel Stand 6C30, Hall 6

Since 1986, Comptel has helped more than 290 service providers across 86 countries meet over one billion subscribers' communications and infotainment needs. Comptel's solutions are built on an Event - Analysis - Action strategic framework that leverages the company's strengths in collecting and analysing Big Data and turning intelligence into opportunities in real time. Comptel's service fulfillment, mediation, charging and policy control, and predictive social analytics products with implementation and professional services enable service providers to automate customer interactions and other business decisions, to create revenue, reduce costs and lessen churn. Comptel has a global team of over 600 professionals, and net sales were EUR 77 million in 2011.

Contact details: Ulla Koivukoski, SVP marketing and communications, email: ulla.koivukoski@comptel.com www.comptel.com



CSG International Stand 5C108, Hall 5

CSG International is a market-leading business support solutions and services company serving the majority of the top 100 global communications service providers, including leaders in fixed, mobile and next-generation networks such as AT&T, Comcast, DISH Network, France Telecom, MasterCard, Orange, T-Mobile, Telefonica, Time Warner Cable, Vodafone, Vivo and Verizon. With over 25 years of experience and expertise in voice, video, data and content services, CSG International offers a broad portfolio of licensed and Software-as-a-Service (SaaS)-based products and solutions that help clients compete more effectively, improve business operations and deliver a more impactful customer experience across a variety of touch points. Contact details: Heidi Halliday, email:

heidi.halliday@csgi.com,

Tel:+44 1483 745825 www.csgi.com



CTI Group Stand 7H107, Hall 7

CTI Group is an international provider of ebilling and analytics, call recording and call management solutions. Our carrier-grade portfolio supports the growing VoIP, mobile and converged telephony markets with robust, feature-rich applications that provide cost savings opportunities as well as revenue generating enhancements. Our products also help organisations achieve regulatory and

mandatory compliance. With over 20 years of experience in providing in-depth telecom billing analysis, call recording and call accounting applications for legacy, VoIP and mobile telephony, we support more than 13,000 installations in 45 countries worldwide. We're dedicated to providing user-friendly, versatile applications, which is evidenced through the partnerships we have forged with leading service providers, resellers and enterprises. Through our integration into virtual workforce management and cost allocation arenas, we have received numerous industry recommendations and awards. We're giving away an iPad at the event-visit us and take the 2 minute survey for your chance to win. Contact details: Emma Dunleavy email: edunleavy@ctigroup.com www.ctigroup.com

Ericsson



Ericsson is the world's leading provider of communications technology

and services. We are enabling the Networked Society with efficient real-time solutions that allow us all to study, work and live our lives more freely, in sustainable societies around the world. Our offering comprises services, software and infrastructure within Information and Communications Technology for telecom operators and other industries. Today more than 40 percent of the world's mobile traffic goes through Ericsson networks and we support customers' networks servicing more than 2.5 billion subscribers. Ericsson has over 280 charging and billing installations serving more than 2 billion users, more than 300 commercial activation installations serving more than 1 billion users, and more than 130 commercial device management installations serving more than 800 million users. We operate in 180 countries and employ more than 100,000 people. Founded in 1876, Ericsson is headquartered in Stockholm, Sweden.

www.ericsson.com/oss-bss



InfoVista Stand 7E70, Hall 7

The mobile operator battleground has shifted from gaining new subscribers to retaining them through superior customer experience. Simultaneously, the data demand explosion has introduced the need to contain network costs better than ever before. While new technologies such as IP/Ethernet backhaul, LTE and HetNet tackle the capacity problem, they also introduce a level of operational and engineering complexities that can only be addressed with innovative planning and optimization solutions. The acquisition of Mentum by InfoVista brings together an extensive radio and IP expertise to help mobile operators handle the complexity of their multitechnology and multi-vendor radio, transport and packet networks.

Contact details: mlippe@infovista.com www.infovista.com



OpenCloud

OpenCloud Stand 5i114, Hall 5

OPENCLOUD TO LAUNCH OPEN, EXTENDABLE TELECOM SERVICES FOR VOLTE Telecoms software innovator OpenCloud recently announced the forthcoming launch of Rhino Sentinel Voice over LTE (VoLTE), the next addition to OpenCloud's successful Sentinel suite of telecom service-layer solutions. OpenCloud originally launched the Rhino Sentinel suite 12-months ago to facilitate the rapid and cost-effective deployment and differentiation of telecom services for existing legacy and IP networks. Rhino Sentinel VoLTE extends these benefits to network operators preparing to launch VoLTE services. Jonathan Bell, OpenCloud's VP Product Marketing said: "Call control services and service continuity are the base functions delivered by Rhino Sentinel VoLTE, and they follow the 3PGG standards. However, if all you do is follow the standards then all you get is commodity services. To win and retain market share against your competitors requires more. OpenCloud enables the independent, competitive service differentiation that operators need to go beyond the 'plain vanilla' standards.' Contact details: Tel: +44 (0)223 395 611 email: info@opencloud.com

OPENET

Openet Stand 2A48, Hall 2

Since the introduction of mobile data services in 1998, Openet has helped service providers capitalise on opportunities and overcome challenges. With competitive pressure accelerating, today's service providers rely on Openet software to evolve business models around networking smartphones, M2M devices and third party services. Openet's portfolio combines policy and charging control with device and third party interaction to enable innovative charging models, to control operating cost and to personalise services. More than 80 of the world's largest service providers in 28 countries use Openet's high performance software. Contact details: Stephen O'Riordan Tel: +353 87 699 6515 www.openet.com

Orga Systems.

Orga Systems Stand 5E110. Hall 5

www.orga-systems.com

For 20+ years, Orga Systems' portfolio of real time products and consulting services has been designed for living in a connected world. Scalable architecture, outstanding performance, lowest rating latency and consequent customercentricity ensure reliable access to any kind of cross vertical NG services for 500+M subscribers in Africa, Americas, Asia and Europe. Worldwide 40+ telecommunications providers, energy suppliers, car manufacturers, automotive and logistics companies rely on Orga Systems and achieve reduced opex, real time-to-market, short termed ROI as well as beneficial access to new value chains and profitable M2M revenue streams.

REDANEE

Redknee Stand 5E40, Hall 5

Redknee is a leading global provider of innovative communication software products, solutions and services. Redknee's awardwinning solutions enable operators to monetise the value of each subscriber transaction while personalising the subscriber experience to meet mainstream, niche and individual market seament requirements. Redknee's revenue generating solutions provide advanced converged billing, rating, charging and policy for voice, messaging and new generation data services to over 90 network operators in over 50 countries, Established in 1999, Redknee Solutions is the parent of the wholly-owned operating subsidiary Redknee Inc. and its various subsidiaries.

Contact details: marketing@redknee.com www.redknee.com



Tekelec Stand 6E21. Hall 6

Tekelec's intelligent mobile broadband solutions enable service providers to manage and monetize mobile data in LTE, IMS and 3G networks. We are the architects of the New Diameter Network, a portfolio of session, policy and subscriber data management products that lay the foundation to evolve to software-defined ThinkingNetworks. We help operators become digital lifestyle providers by implementing innovative, personalised services and scaling networks efficiently. More than 300 service providers use our marketleading solutions to deliver cloud, machine-tomachine and personalised services to consumers and enterprises.

Our Diameter Signaling Router manages Diameter signaling growth through centralised core routing, load balancing and congestion control. Integrated policy and subscriber data management allows operators to increase revenues with mobile advertisers, over-the-top applications and device providers, while accelerating cloud and machine-to-machine service growth. Our policy solutions extend policy management to devices, OTT applications and analytics to align subscribers' lifestyles with new tailored services.

www.tekelec.com



Tektronix Communications Stand 6E95, Hall 6

Tektronix Communications is a global leader in service provider assurance and intelligence. Our solutions provide communication service providers and equipment manufacturers around the world an unparalleled suite of tools to monitor, assure and analyse services and

network performance from core to access. database to device, for fixed, mobile and converged multi-service networks. This comprehensive set of solutions and services support a range of architectures and applications such as LTE, HSPA, 3G, IMS, mobile broadband, VoIP and triple play. Today, Tektronix Communications solutions are used to assure and monitor more than 30 percent of the world's network traffic for both mobile and fixed operators. Tektronix Communications is headquartered in Plano, Texas.

www.tekcomms.com



Executive Meeting Room, Hall 1 C4

TEOCO is the leading provider of assurance and analytics solutions to communication service providers worldwide. TEOCO's product portfolio includes: Customer Analytics -Combine profitability, quality of experience, and behavioral data to better understand, target and engage the subscriber base. Margin Assurance - Manage costs and revenues to understand the profitability of every transaction. Service Assurance - Resolve faults, maximise performance and utilisation and improve customer experience. Network optimisation - Optimise radio access networks to reduce costs while improving coverage, capacity, and quality of the network. Contact details: Jonjie Sena at

senaj@teoco.com www.teoco.com



WeDo Technologies

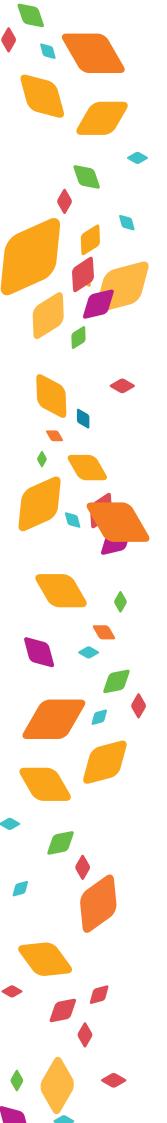
WeDo Technologies has recently announced the latest major release of its proven software suit, RAID. RAID 7.0 is a huge breakthrough for WeDo Technologies' team and customers. RAID 7.0 will provide CSPs with best in class software to address the ever increasing business assurance complexities associated with LTE, machine to machine or mobile money. RAID 7,0 addresses these, along with many other challenges that CSPs face on a daily basis, helping to improve their bottom line and optimise their business.

WeDo Technologies works with some of the world's leading blue chip companies from the retail, energy and finance industries, as well as more than 140 telecommunications operators from more than 80 countries.

WeDo Technologies will be showcasing its new business assurance suite in hall 7, stand #B94 at the Mobile World Congress in Barcelona and would be glad to show you its latest tool for automated audit and revenue leakage control for the telecom industry.

Contact details: email:

customer.services@wedotechnologies.com www.wedotechnologies.com



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