Exhibit Surveys

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WEFTEC 2011
Technical Exhibition and Conference

October 15-19, 2011, Los Angeles

Survey Report

CONFIDENTIAL

Table of Contents

	Page
Introduction	**3**
Methodology	4
Key Findings	5
Attendee Profile	**6**
Job Title	7
Key Focus Areas	8
Nature of Organization	9
Level of Education	10
Years of Experience	11
Role in Buying	12
Net Buying Influences (NBI)	15
Age and Gender	16
Miles Traveled	17
Geographical Distribution	18
Average Annual Budgets	19
Other Shows or Conferences Attended *(Aided)*	20
Publication Readership *(Aided)*	21
Attendee Activity & Interest	**22**
Previous Attendance	23
Hours and Number of Days Spent at the Exhibits	24
Product Interest & Buying Plans	25
Total Buying Plans (TBP)	26
Activities Attended	27
Net Promoter® Score (NPS) Likelihood of Recommending WEFTEC	28
Technical Sessions	**29**
Hours and Days Spent at the Technical Sessions	30

Exhibit / Sponsor Performance **31**

Most Remembered Exhibits *(Unaided)* 32

Most Remembered Sponsors *(Unaided)* 33

Appendix **34**

Cover Letter 35

Introduction

Methodology

- An online survey was conducted. An email invitation with the URL for the survey site was sent to a random sample of 5,259 registrants on December 14, 2011. Additional mailings to non-respondents were sent on December 16 and December 20, 2011.

- A total of 1,166 questionnaires were submitted by the cut-off date for a net return of 23% (after correcting for 136 undeliverable emails). The maximum statistical error due to sample size is ±2.7% at a 95% confidence level.

- Results in this report are projectable to 7,711 attendees. This figure excludes exhibitor personnel, press, speakers, WEF staff, manufacturers' reps, students, and retired personnel.

Key Findings

WEFTEC 2011 brought together a high quality audience with strong buying power. WEFTEC attendees are extremely loyal with a Net Promoter® Score* (NPS) that is well above ESI's all show average.

- WEFTEC attendees primarily consist of upper or senior management (30%), engineering and design staff (26%), and engineering, laboratory, and operations management (21%). (See page 7)
    - WEFTEC attendees are highly educated (45% have a Master's Degree or PhD). (See page 10)
    - They have an average of 20 years' experience in the field. (See page 11)
- An attendee, who recommends products, specifies suppliers, or who makes final purchasing decisions is considered to be a buying influence. For each product category, Net Buying Influences (NBI) is the percentage of attendees who have at least one buying role. WEFTEC has high quality attendees with an NBI of 80% - on par with ESI's all show average of 80%. Detailed buying roles for specific products and services are shown on pages 12-14. An overall summary is shown on page 15.
- Sixteen percent of attendees came from outside the U.S. (See page 18) A total of 60% traveled more than 1,000 miles to attend the conference. (See page 17)
- Thirty percent have attended no other conference in the past twelve months. (See page 20)
- A quarter (27%) of attendees are first-timers and 38% attended WEFTEC in 2010. (See page 23)
- Attendees spent an average of 8.3 hours at the exhibits over 2.2 days. (See page 24)
- A third (31%) plan to purchase a product or service as a result of what they saw at WEFTEC. See page 25 for details on interest and purchase plans for specific products/services.
- The Net Promoter® Score* is a metric for customer loyalty and satisfaction with a brand. Fifty-three percent of WEFTEC attendees said they were likely to recommend WEFTEC to a friend or colleague with a rating of 9 or 10. Eleven percent gave a 0 to 6 rating. The Net Promoter® Score (NPS) is calculated by subtracting the 11% who are less likely to recommend WEFTEC from the 53% who are highly likely to recommend WEFTEC. The Net Promoter® Score for WEFTEC is +42%. For comparison, ESI's all-show average is +33%. (See page 28)

** The Net Promoter® Score is a trademark of F. Reichheld, Bain & Co., and Satmetrix.*

Attendee Profile

Job Title

What is your primary job function?

Nearly a third (30%) of WEFTEC attendees are upper or senior management. Another quarter (26%) are engineering and design staff.

Job Title	% Los Angeles 2011
Upper or Senior Management (e.g., President, Vice President, Owner, Director, Executive Director, General Manager, Mayor, etc.)	30
Engineering and Design Staff (e.g., Consulting Engineer, Civil Engineer, Mechanical Engineer, Chemical Engineer, Planning Engineer, etc.)	26
Engineering, Laboratory and Operations Management (e.g., Superintendent, Manager, Section Head, Department Head, Chief Engineer, Division Head, etc.)	21
Purchasing/Marketing/Sales (e.g., Purchasing, Salesperson, Market Representative, Market Analyst, etc.)	14
Operations (e.g., Shift Supervisor, Foreman, Plant Operator, Service Representative, Collection Systems Operator, etc.)	4
Scientific and Research Staff (e.g., Chemist, Biologist, Analyst, Lab Technician, etc.)	3
Educator (e.g., Professor, Teacher, etc.)	1
Student	<1
Other	1
	100

Key Focus Areas

What areas do you consider to be your key focus areas?

Seventy-three percent of attendees specialize in wastewater.

Multiple answers were allowed, therefore, the responses total to more than 100% for this question.

Key Focus Areas	% Los Angeles 2011
Wastewater	73
Water/Wastewater	55
Collection Systems	38
Industrial Water/Wastewater/Process Water	38
Water Reuse and/or Recycle	36
Drinking Water	34
Residuals/Sludge/Biosolids/Solid Waste	31
Stormwater	24
Utility Management	18
Odor/Air Emissions	16
Groundwater	13
Watershed/Surface Water Systems	12
Legislation (Policy, Legislation, Regulation)	10
Lab & Analytical	10
Public Education/Information	9
Health & Safety	9
Toxic and Hazardous Material	5
Land and Soil Systems	3
Other	4

Nature of Organization

What is the nature of your organization?

Consulting or Contracting Firms are the most frequently represented type of organization.

Nature of Organization	% Los Angeles 2011
Consulting or Contracting Firm (e.g., Engineering, Contracting and Environmental)	34
Municipal/District Water and Wastewater Systems and/or Plants	16
Municipal/District Wastewater Only Systems and/or Plants	16
Industrial Systems/Plants (Manufacturing, Processing, Extraction)	3
Manufacturer or Water/Wastewater Equipment or Products	12
Government Agency (e.g., U.S. EPA, State Agency, etc.)	3
Educational Institution (Colleges and Universities, Libraries, and other related organizations)	2
Water/Wastewater Product Distributor or Manufacturer's Rep.	12
Research or Analytical Laboratories	<1
Municipal/District Water Only Systems and/or Plants	1
Other	1
	100

Level of Education

What is your highest education level?

Seventy-seven percent of the attendees have a bachelor's or master's degree.

Level of Education	% Los Angeles 2011
High School	2
Some College	8
Associates Degree	4
Bachelor's Degree	39
Master's Degree	38
PhD	7
Technical School	2
JD	<1
	100

Years of Experience

How many years of experience do you have in the water environment field?

Half (50%) of the attendees have more than 20 years of experience.

Years of Experience in Water Environment Field	% Los Angeles 2011
Less than 1 year	3
1 – 5	11
6 – 10	13
11 – 20	23
21 – 30	26
More than 30	24
	100

Average # of years of experience: **20**

Role in Buying

What role(s) do you play in the purchase of each of the following types of product categories?

An attendee, who recommends products, specifies suppliers, or who makes final purchasing decisions is considered to be a buying influence. For each product category, Net Buying Influences (NBI) is the percentage of attendees who have at least one buying role. Since attendees can have multiple buying roles, the sum of the percentages for specific roles may exceed the Net Buying Influences.

	% Los Angeles 2011
Chemicals & Chemical Handling	
Final Say	10
Specify Supplier	12
Recommend	22
Net Buying Influences	**37**
Contract Operations	
Final Say	5
Specify Supplier	4
Recommend	13
Net Buying Influences	**19**
Drinking Water Treatment Equipment/Processes	
Final Say	7
Specify Supplier	13
Recommend	17
Net Buying Influences	**32**
Engineering & Consulting	
Final Say	10
Specify Supplier	9
Recommend	24
Net Buying Influences	**38**
Industrial & Hazardous Waste Management	
Final Say	5
Specify Supplier	5
Recommend	11
Net Buying Influences	**18**

Role in Buying *(Continued)*

	% Los Angeles 2011
Instrumentation, Controls, and Automation	
Final Say	11
Specify Supplier	17
Recommend	24
Net Buying Influences	**43**
Pipes and Collection Systems	
Final Say	10
Specify Supplier	16
Recommend	21
Net Buying Influences	**39**
Pumps, Valves, and Motors	
Final Say	13
Specify Supplier	22
Recommend	27
Net Buying Influences	**51**
Safety Equipment	
Final Say	10
Specify Supplier	10
Recommend	17
Net Buying Influences	**31**
Sampling and Laboratory Equipment/Services	
Final Say	9
Specify Supplier	10
Recommend	17
Net Buying Influences	**30**

Role in Buying *(Continued)*

	%
	Los Angeles 2011
Solids Processing/Biosolids Management	
Final Say	9
Specify Supplier	15
Recommend	23
Net Buying Influences	**40**
Stormwater Equipment Processes	
Final Say	5
Specify Supplier	9
Recommend	15
Net Buying Influences	**24**
Wastewater Treatment Equipment/ Processes	
Final Say	15
Specify Supplier	25
Recommend	34
Net Buying Influences	**60**
Other Related Products/Services	
Final Say	2
Specify Supplier	2
Recommend	3
Net Buying Influences	**6**

Net Buying Influences (NBI)

The Net Buying Influences (NBI) of the WEFTEC® 2011 attendees is 80%. Eighty percent have the ability to authorize, specify, or recommend products and services for purchase. For comparison, ESI's all-show average is also 80%.

More specifically, 28% have the final say in the purchase of at least one of the categories measured, 37% specify the supplier, and 55% recommend one or more products for purchase. For comparison, ESI's all show average is 33% for final say, 27% for specify supplier, and 47% for recommend.

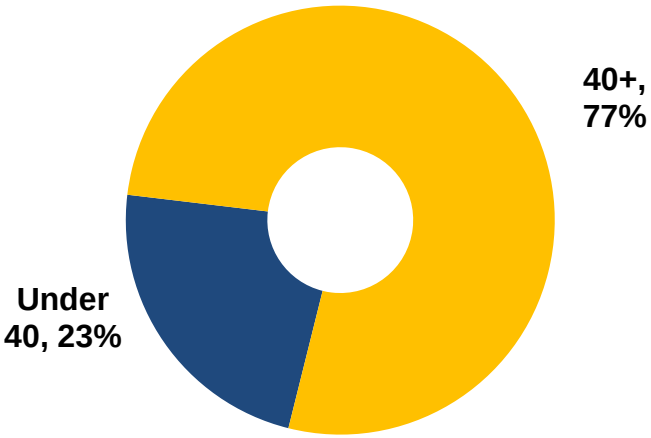
	Los Angeles 2011	% Conference	Exhibition
Final Say	28	28	29
Specify Supplier	37	40	34
Recommend	55	60	49
Net Buying Influences	**80**	**82**	**77**

Age and Gender

Q: What is your age?

Q: What is your gender?

Average Age: 48
ESI All-Show Average: 46



Gender

Male 85%
ESI All-Show Average: 65%

Female 15%
ESI All-Show Average: 35%

Miles Traveled

How many miles did you travel (one way) to attend WEFTEC® 2011?

Seventy-four percent of the attendees traveled more than 400 miles to attend this show. For comparison, the ESI all-show average is 79%.

Miles Traveled	% Los Angeles 2011
Up to 50	**13**
51 to 200	**8**
201 to 400	**5**
401 to 1,000	**14**
1,001 to 2,000	**27**
More than 2,000	**33**
	100
Average:	**1,700**

Geographical Distribution

A total of 49 states and the District of Columbia were represented. In addition, 16% came from outside the US.

US State	%	US State	%
Northeast	**11**	**Southeast**	**14**
Connecticut	1	Alabama	1
Delaware	<1	Arkansas	1
Maine	<1	District of Columbia	<1
Maryland	2	Florida	2
Massachusetts	1	Georgia	3
New Hampshire	<1	Kentucky	<1
New Jersey	2	Louisiana	1
New York	2	Mississippi	<1
Pennsylvania	3	North Carolina	2
Rhode Island	<1	South Carolina	<1
Vermont	<1	Tennessee	1
Southwest	**6**	Virginia	2
Arizona	1	West Virginia	<1
New Mexico	<1	**Midwest**	**15**
Oklahoma	<1	Illinois	2
Texas	4	Indiana	1
West	**38**	Iowa	1
Alaska	<1	Kansas	1
California	28	Michigan	1
Colorado	3	Minnesota	1
Hawaii	2	Missouri	1
Idaho	<1	Nebraska	<1
Montana	<1	North Dakota	1
Nevada	<1	Ohio	3
Oregon	1	South Dakota	<1
Utah	2	Wisconsin	2
Washington	1	**Outside the US**	**16**
		Canada	7
		Mexico	2
		Other Countries	7
			100

Average Annual Budgets

Q: What is your organization's current annual capital equipment budget for collection systems, wastewater treatment and drinking water treatment and distribution?

Q: What is your organization's current annual operating and maintenance budget for collection systems, wastewater treatment and drinking water treatment and distribution?

Attendees were asked what their company's annual budgets were for the various categories listed.

	Average Current Annual Budget
	Los Angeles 2011
Capital Equipment	
Collection Systems	**$9,468,500**
Wastewater Treatment	**$8,617,000**
Drinking Water Treatment and Distribution	**$8,798,700**
Operating and Maintenance	
Collection Systems	**$8,835,700**
Wastewater Treatment	**$12,561,300**
Drinking Water Treatment and Distribution	**$7,562,500**

Other Shows or Conferences Attended
(Aided)

What other conferences and exhibitions have you attended in the past 12 months?

Less than one-third (30%) of the attendees indicated they have not been to any other show or conference in the past year. For comparison, ESI's all-show average is 46%.

Show	% Los Angeles 2011
WEF MA Conference	24
AWWA Annual Conference and Exposition	18
WaterReuse Association Symposium	4
IWA Congress	4
American Public Works Association	4
IFAT Munich	3
Pumper Show	3
Aquatech	3
No-Dig Show	2
StormCon	1
CWEA*	1
NACWA*	1
Utility Management Conference*	1
Other state/regional shows	29
No other show/conference attended	**30**

**Unaided Response*

Publication Readership
(Aided)

Which trade publications do you read regularly?

This information is useful in selecting the best media for reaching the type of attendees who visit this show.

The add-on percentages provide the total reach achieved by advertising in consecutive publications. For example, if a company placed an ad in WE&T (Water Environment & Technology), 69% of the attendees could be exposed to the ad. If the same company also placed an ad in Water & Wastes Digest, an additional 5% or a net total of 74% of the attendees could have seen the ad. If ads were placed in the top four publications, 77% of the attendees could have had a chance to see the ad.

	Aided Readership, %	
Publication	**Los Angeles 2011**	**Add-on**
Water Environment & Technology (WE&T)	69	**+69**
Water & Wastes Digest	27	**+5**
WaterWorld	21	**+2**
Journal of the American Water Works Association	16	**+1**
Civil Engineering	15	**+2**
Public Works	15	**+1**
Pollution Equipment News	14	**+<1**
TPO	12	**+<1**
Trenchless Technology	12	**+1**
Engineering News Record	11	**+1**
Pumps & Systems	10	**+1**
Municipal Water & Sewer	10	**+<1**
World Water	9	**+1**
Water & Wastewater International	6	**+<1**
Water 21	4	**+<1**
American City & County	4	**+<1**
Other	9	**+2**

Attendee Activity & Interest

Previous Attendance

Check all previous years that you have attended WEFTEC.

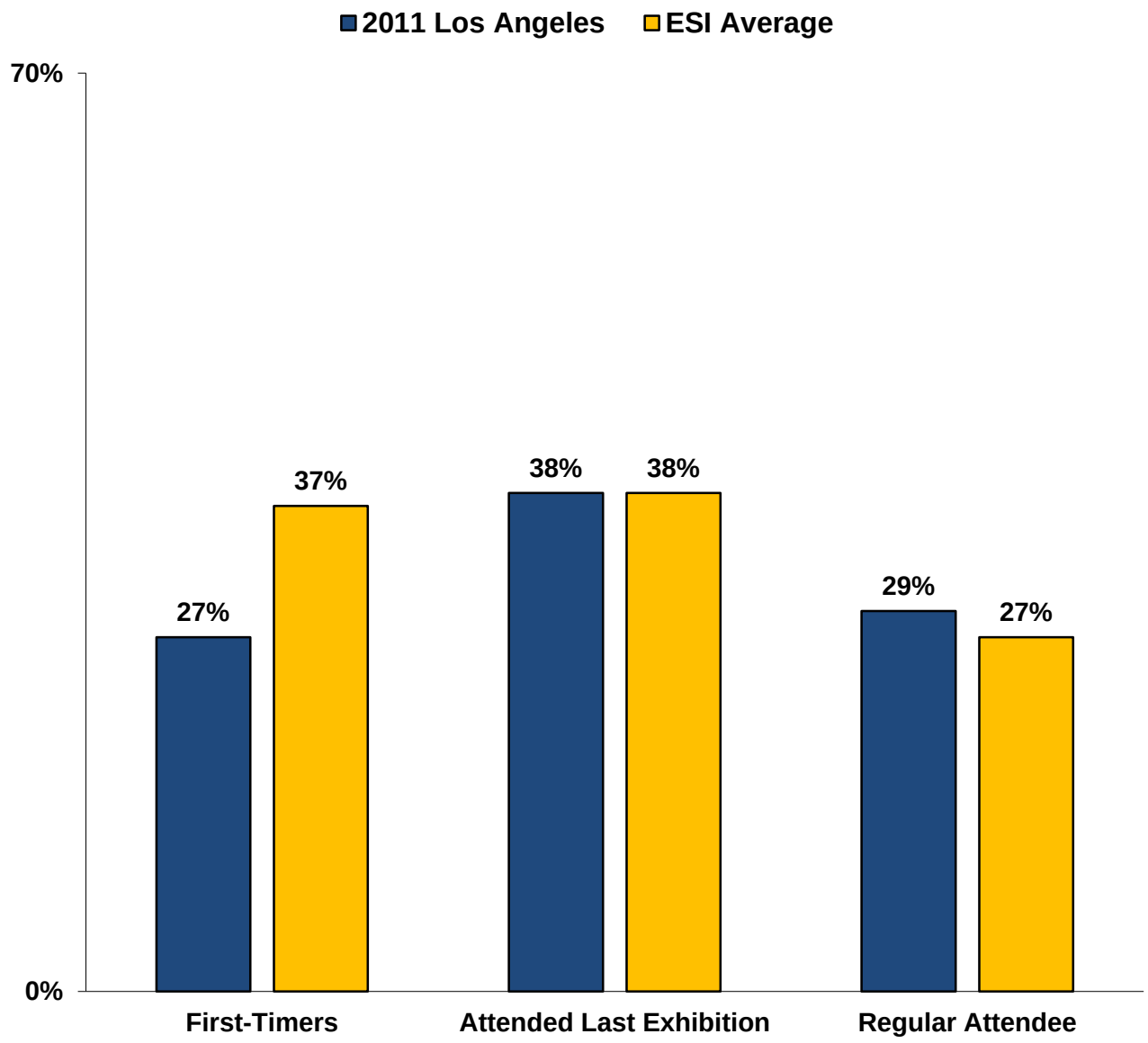
For any show to grow and remain vibrant, there needs to be a good mix between first timers and repeat attendees.

These results indicate that 27% of the attendees are first time visitors. For comparison, the ESI average for all exhibitions is 37%. Thirty-eight percent also attended the last exhibition (38% is average).

Twenty-nine percent can be considered regular attendees in that they have attended for the past three years. ESI's all-show average is 27%.

Exhibitors should look at the overlap in attendance results from the standpoint of exhibit/graphic re-use. The lower the overlap, the more an exhibit/graphic can be re-used without overexposure to the same audience.

The higher the overlap in attendance from year to year, the more regularly exhibitors need to provide a fresh approach to attendees in terms of exhibit design, graphics, promotions, attention-getting techniques, etc.



Hours and Number of Days Spent at the Exhibits

How many hours did you spend at the exhibits each day? Please only include the time you spent on the show floor and not total time spent at the show each day.

Attendees spent an average of 8.3 hours at the 2011 WEFTEC exhibits. Conference attendees spent an average of 6.8 hours while exhibition registrants spent an average of 10 hours. For comparison, ESI's all-show average is 8.6.

Time Spent at Exhibits Over Three Days

	Los Angeles 2011	2011 ESI All-Show Average
Average Hours Spent at Exhibits Over Three Days	8.3	8.6
Average Number of Days Spent at Exhibits Over Three Days	2.2	2.4

Product Interest & Buying Plans

Check the products or services that you found of interest at the show. Also check those products or services that you plan to buy or recommend to buy ***as a result of what you saw at the show****.*

Product interest is the best indicator of an exhibitor's potential for success at a show. It determines an exhibitor's potential audience at the show which in turn drives strategy to answer the question: "Should we exhibit, and to what extent (booth size, number of personnel, etc.)?"

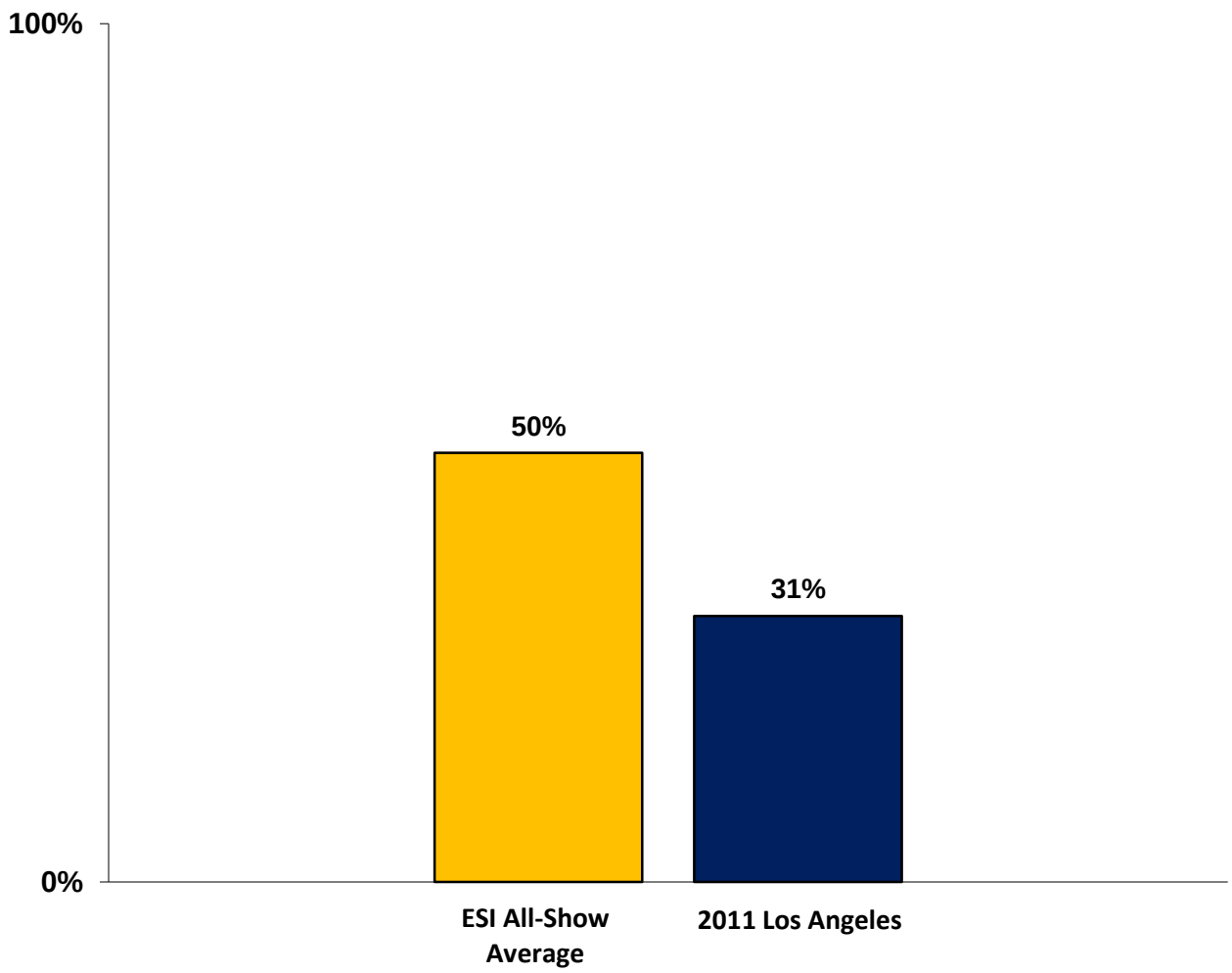
	Los Angeles 2011	
Product/Service	**Interested, %**	**Plan to Buy, %**
Chemicals and Chemical Handling	**25**	**6**
Contract Operations	**9**	**1**
Drinking Water Treatment Equip./Processes	**32**	**4**
Engineering & Consulting	**27**	**3**
Industrial & Hazardous Waste Management	**13**	**1**
Instrumentation, Controls, and Automation	**38**	**11**
Pipe and Collection Systems	**31**	**8**
Pumps, Valves, and Motors	**48**	**14**
Safety Equipment	**18**	**5**
Sampling and Laboratory Equipment/Services	**18**	**6**
Solids Processing/Biosolids Management	**38**	**8**
Stormwater Equipment Processes	**21**	**3**
Wastewater Treatment Equipment/Processes	**69**	**16**
Other Related Products or Services	**4**	**2**

Total Buying Plans: 31%

Total Buying Plans (TBP)

TBP is the percentage of attendees planning to buy one or more of the products or services measured as a result of what they saw at the show.

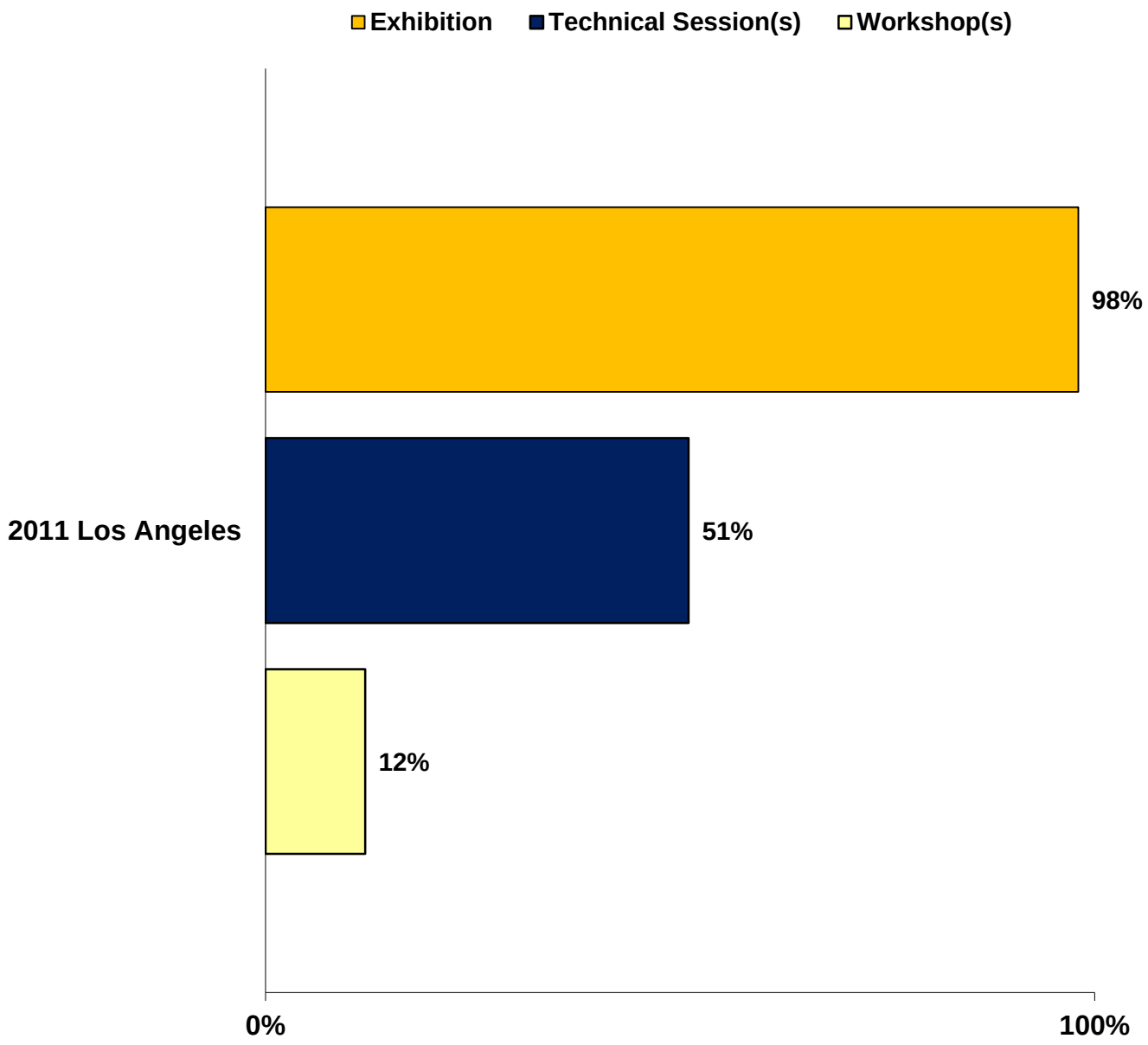
TBP for WEFTEC® 2011 is 31% which is statistically lower than ESI's all-show average (50%).



Activities Attended

What did you attend at WEFTEC® 2011?

Nearly all attendees went to the exhibition floor. Half (51%) attended the technical sessions and a tenth (12%) attended the workshops.



Net Promoter® Score (NPS) Likelihood of Recommending WEFTEC

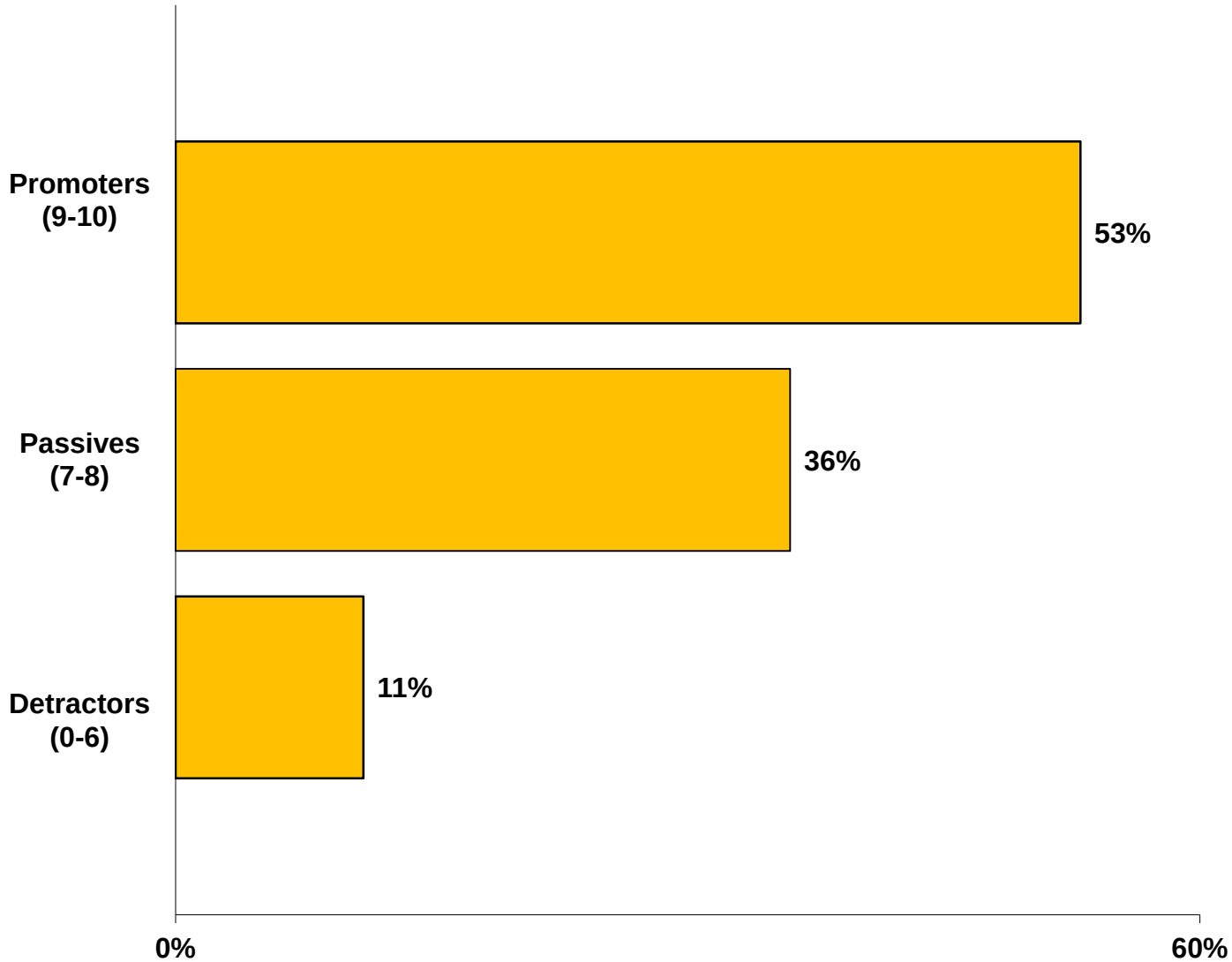
How likely are you to recommend WEFTEC to a business associate or colleague? Please rate on a scale where 10 = Extremely Likely, 5 = Neutral, and 0 = Not at all Likely.

The Net Promoter® Score* is a widely used metric for customer loyalty and satisfaction with the brand.

Fifty-three percent of WEFTEC attendees said they were likely to recommend WEFTEC to a friend or colleague with a rating of 9 or 10. These visitors can be considered promoters. Thirty-six percent rated a 7 or 8 and can be considered passives. Eleven percent gave a 0 to 6 rating and can be considered detractors.

The Net Promoter® Score (NPS) is calculated by subtracting the 11% who are less likely to recommend WEFTEC from the 53% who are highly likely to recommend WEFTEC. The Net Promoter® Score for WEFTEC is +42%. For comparison, ESI's all-show average is +33%. The NPS is higher among conference attendees (+49%) vs. exhibition attendees (+35%).

WEFTEC NPS= +42%
ESI's All-Show Average NPS = +33%



** The Net Promoter® Score is a trademark of F. Reichheld, Bain & Co., and Satmetrix.*

See the Addendum for attendees' reasons for their specific ratings.

Technical Sessions

Hours and Days Spent at the Technical Sessions

How many hours did you spend at the technical sessions each day?

The registrants spent an average of 9.6 hours over 2.5 days at the WEFTEC technical program. The highest attendance was on Tuesday. All these days were strong for the technical sessions.

Verbatim comments on the sessions/workshops of most interest are listed in the Addendum. Also shown in the Addendum are topics of interest for future technical programs and workshops.

Time Spent at Technical Sessions Over Three Days

	Los Angeles 2011
Average Hours Spent Over Three Days	9.6
Monday	3.5
Tuesday	4.2
Wednesday	3.5

Specific Days Spent at Technical Program	%
Monday	86
Tuesday	94
Wednesday	74

Exhibit / Sponsor Performance

Most Remembered Exhibits *(Unaided)*

What three companies' exhibits attracted your attention the most? Please check the main reasons for remembering these exhibits.

These companies had the most remembered exhibits in the show based on the unaided recall question, "What three exhibits attracted your attention the most?" The unaided recall column gives their basic scores.

The figures under the "reasons for remembering" columns represent the percentage of attendees who stated that particular reason for remembering the exhibit. For example, of the 96 respondents who remembered Siemens, 13% mentioned demonstrations, 71% mentioned product interest, etc. Product interest was the main reason for remembering most of these exhibits.

In addition to the reasons given for remembering each exhibit, size plays an important role in making the list. ESI research has shown a direct correlation between size of exhibit and the ability to generate maximum recall as a most remembered exhibit.

		Reasons For Remembering						
Company	Unaided Recall	Demon-stration	Product Interest	Literature	Color/ Design	Booth Personnel	Well Known Company	Give aways
1. Siemens	8	13	71	14	19	22	58	2
2. ITT Corporation	5	17	68	8	21	27	65	10
2. Trojan Technologies	5	27	70	7	39	29	54	7
4. Hach Company	4	14	80	23	9	16	43	9
5. GE Water & Process Tech.	3	18	63	11	18	24	45	--
5. Ovivo	3	26	79	10	21	38	49	8
5. Veolia Water	3	9	74	18	9	29	47	--
8. Alfa Laval Inc.	2	11	84	11	--	37	26	--
8. Andritz Separation Inc.	2	18	75	7	4	50	46	--
8. Flygt	2	5	81	29	--	33	48	10
8. Gorman-Rupp Pumps	2	9	77	18	9	55	55	23
8. Huber Technology Inc.	2	17	97	14	3	31	28	--
8. JWC Environmental	2	19	86	19	14	43	57	5
8. U.S. Environmental Protection Agency	2	--	22	87	4	43	39	22
8. WesTech Engineering Inc.	2	17	67	6	--	17	50	--
16. ADS LLC	1	14	71	7	--	57	36	7
16. Calgon Carbon Corporation	1	76	18	6	6	24	6	6
16. Headworks Bio Inc.	1	13	93	--	7	20	27	--
16. Kruger Inc.	1	43	79	14	7	29	43	--
16. M2 Renewables Inc.	1	36	93	--	--	29	--	14
Average of above:		**18**	**72**	**15**	**14**	**30**	**47**	**6**

Most Remembered Sponsors *(Unaided)*

What companies do you recall as WEFTEC® sponsors? Please check the sponsor recognition that you remember seeing.

Trojan Technologies and Ch2M Hill are the most remembered sponsors, followed by Black & Veatch. In general, event signs, sponsor banners and e-services/bag/ lanyards were the main reasons for remembering these sponsors.

	%							
		Reasons for Remembering						
Company	Unaided Recall	E-Services/ Bag/ Lanyard	Event Signs	Sponsor Banner	Session Slides	Opening General Session Recognition	Onsite program	www.weftec. org Sponsor Listings
1. Trojan Tech	8	76	29	18	2	--	20	20
2. CH2MHill	7	--	61	50	5	7	16	22
3. Black & Veatch	4	7	49	37	7	23	19	26
3. ITT Corporation	4	24	55	43	4	16	31	24
3. Schneider Electric	4	88	21	14	2	5	7	10
6. CDM	3	5	39	45	16	3	21	39
6. HDR	3	5	54	43	24	16	16	27
8. ADS LLC	2	88	17	8	--	4	8	17
8. AECOM	2	4	71	38	--	8	8	17
8. MWH	2	15	40	75	5	5	25	40
8. Siemens	2	14	57	48	--	--	19	29
12. Parsons	1	31	54	46	--	15	8	46
Average of Above		**33**	**45**	**36**	**6**	**8**	**18**	**24**

Appendix

Cover Letter

Dear FirstName LastName, (if present)

We are contacting a small number of WEFTEC® 2011 registrants, requesting their assistance with a survey. Your name was among those randomly selected. Your assistance in completing and returning the survey quickly would be greatly appreciated.

The survey results assist the Water Environment Federation in attracting appropriate exhibitors to the Exhibition. Management of the various companies need to be able to know what products and services the attendees want to see, plan to buy, and what the roles are in the purchasing decisions. If we cannot document the interest in their products and your plans and roles, we will likely not be able to attract additional exhibitors to the show. We all lose if that happens.

Additionally, there are questions on the survey pertaining to the technical sessions. The results of your input will be used by the Program Committee to plan future session topics and workshops.

The survey looks lengthy. But it is really quite easy to complete. Please take a few minutes with your morning coffee and give us the valuable information we need to continue to meet your needs.

Please complete your survey in the next day or two. Thank you for your response.

Click on the following URL to go right to the survey.
http://survey.exhibitsurveys.net/default.aspx?uid=31732.

If your email does not support this hyperlink feature, please copy the above URL and paste it into your internet browser.

Regards,
Sacha Carey
Assistant Director, Exhibition Sales & Operations

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