



IoT – Internet de las cosas

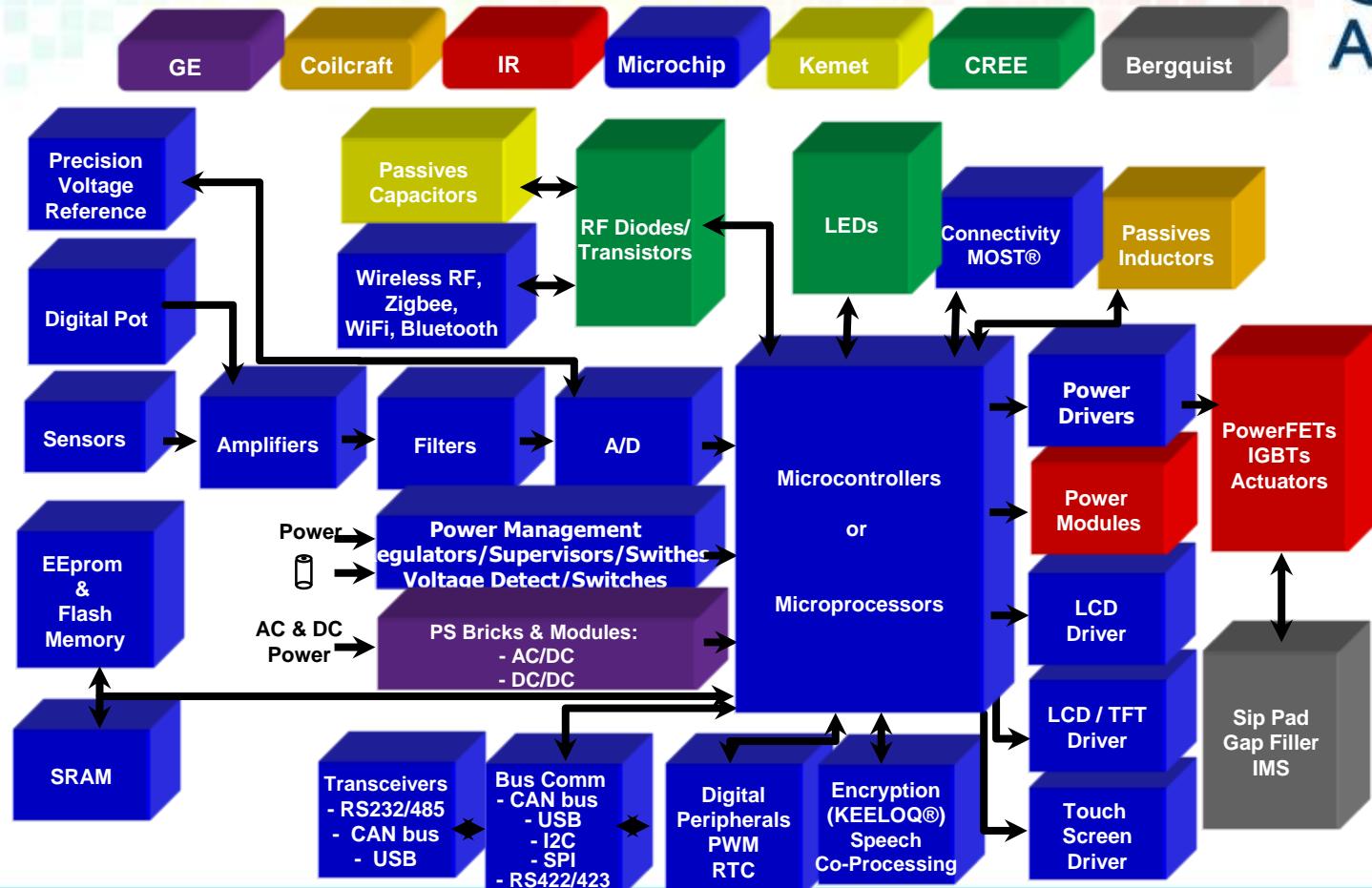
17 de Noviembre de 2016

Artimar Linecard



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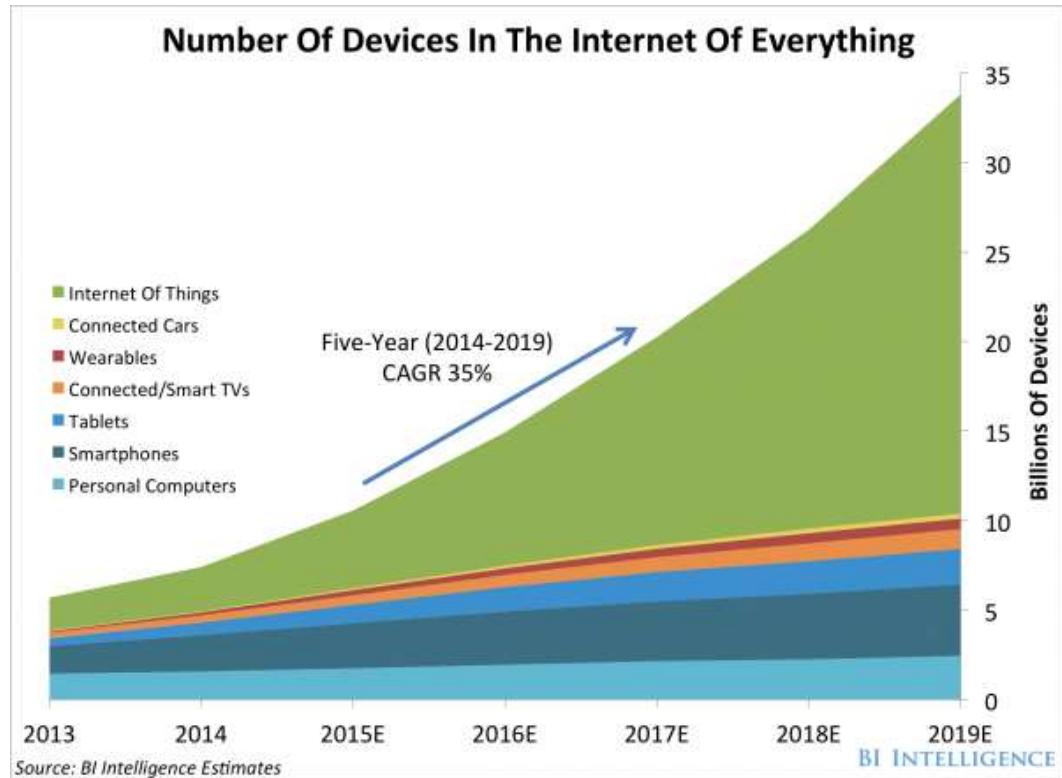
Artimar Total Value Proposition CY16



Agenda

- Qué es IoT y porqué debería importarme?**
- Oportunidades de negocio**
- Tecnologías de IoT**

IoT y el futuro





Low Power WAN: Mercado disponible

SMART ENVIRONMENT & INDUSTRIAL

- Forest fires
- Air pollution
- Earthquake sensors
- Avalanche and flooding
- Heating and AC
- Equipment status
- Factory control

75M

SMART METERING

- Electric
- Water
- Gas
- Infrastructure & production

450M



TRACKING

- Motor bikes
- Cars
- Bicycles
- Kids
- Pets
- Insurance – valuable assets
- Find My Stuff

250M

SMART CITY

- Smart parking
- Traffic sensors & control
- Street lighting
- Infrastructure monitoring
- Trash and waste containers
- Public events –location services
- Advertising displays

200M

AGRICULTURE

- Irrigation control
- Environment sensing
- Animal tracking
- Animal sensing – ovulation, birth

25M

SECURITY/SMART HOME

- Smoke detectors
- Security systems
- Smart appliances
- Heating control / monitoring

250M



Mercados verticales y aplicaciones

IoT and LoRa™ Enabling a Smarter Planet

Applications



SMART CITIES



SMART HOME
AND BUILDING



SMART ENVIRONMENT



SMART METERING



SMART AGRICULTURE



SMART INDUSTRIAL
CONTROL



RETAIL AND
LOGISTICS

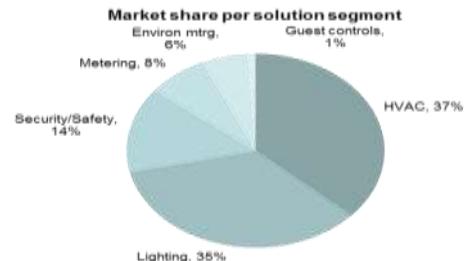


SMART
HEALTHCARE



Edificios inteligentes

- ❑ En el TOP3 de todos los MNO (operadores celulares)
- ❑ 75% de reducción de costos capex y opex
- ❑ TAM - 465M de sensores, 45% de mercado en 2022 = 191M sensores
- ❑ Relacionado con la reducción de primas de seguros
- ❑ Reducción de costos operativos
- ❑ Sub-segmentos de este mercado
 - HVAC, security/safety, lighting, metering, environmental monitoring, control



Established companies	New entrants
Johnson Controls	Ecobee
Schneider	Entouch Controls
Siemens	Golden Power
Ingersoll Rand	Millennial Net
Invensys	Nest
Honeywell	RCS
	TCS Basys
	Thermokon
	Viconics
	Vigilent



Edificios mas inteligentes

Facturar a cada usuario
por separado



Clean after 100 door openings



Mandar estado de vida,
alamas y batería



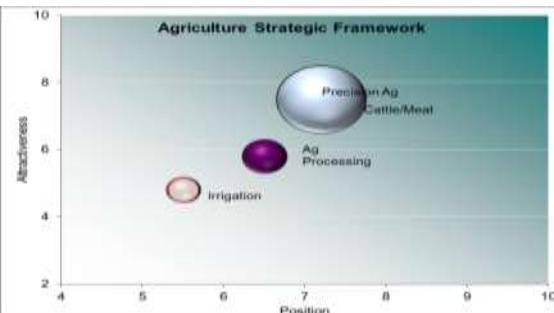
Clean after 5 hours of
high CO2 level





Agricultura y ganadería

- Falta de cobertura celular
- La duración de la batería y el alcance son importantes
- Activos de gran valor, sensores de bajo costo = mas sensores
- Gran éxito con líderes del mercado
- Sub segmentos de agricultura
 - Agricultura de precisión
 - Riego artificial
 - Ganado
 - Procesamiento de agricultura (temperatura, humedad, etc)



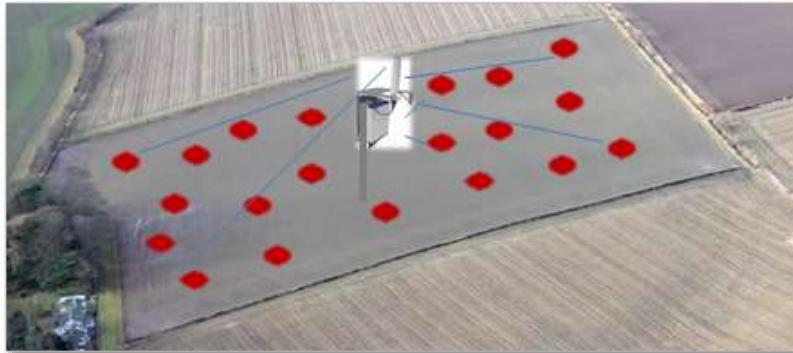
US Ag Market Segments	US Market Size
Irrigation and precision farming	TAM = 100M, SAM = 20M
Ag processing	TAM = 50M, SAM = 10M
Cattle & meat prod	TAM = 190M, SAM = 40M
Total	TAM = 340M, SAM = 70M



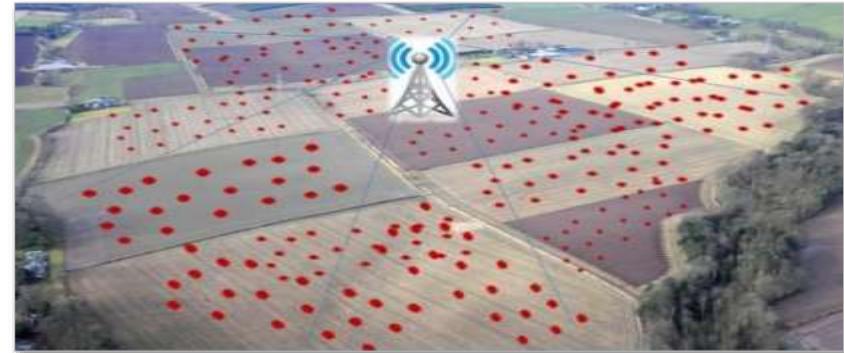


Agricultura - Riego

	Solución actual	LoRa®
# de Hectáreas	200	180.000
Area de cobertura	1 km radio / 2 km ²	24 km de radio / 1800 km ²
Costo de la solución	Alto	Bajo
Simplicidad	Compleja	Muy fácil
Duración de batería	1-2 años	> 5 años



0.5 MILE Radius / 0.75 sq. miles /20 sensors



15 mile radius / 706 sq. miles /18k sensors



Cadena de suministros – Logística

Supply Chain - Trash



Partner

- Enevo - Sensors and analytics for trash and recycling pickup optimization

Benefit

- 40% reduction in collection costs
- 50% reduction in collection
- Aesthetic city benefits to ensure pickup if containers are full ahead of schedule

Supply Chain - Delivery



Partner

- Insigma - Sensors and analytics for coolers

Benefit

- \$B lost to beverage supplier yearly due to out of stock
- \$50 'expense' if truck stops at store which doesn't need stocking
- Coolers or compressors stolen in some countries

Low Power WAN: Use Case

Smart Water Meter

LP WAN Value:

- 10 YR Battery life
- Endpoint cost
- Reduced access cost



There are 3 options for achieving long range for water meter star networks.

1. Cellular: Recurring cost + hardware cost prohibits mass adoption
2. Tier 1 market leader uses high power licensed spectrum – only one doing this
3. LP WAN: Best solution for cost and battery life requirements

Proof of concept showed elimination of 600 repeaters using LP WAN

Elimination of costs associated with “drive-by” reading

North America deploys 6-8M smart water meters annually

Low Power WAN: Use Case Distribution Leak Detection

LP WAN Value:

- 10 YR battery life
- Endpoint cost
- Reduces access cost
- Wide Area needed



35% of all water leakage is lost thru distribution

Municipalities spend billions of dollars annually repairing leaks

- Most leak detection today is only 50% accurate
- Results in additional expense because of the inability to accurately locate leaks

Pipe aging is accelerating by 2% annually in NA

Low cost sensors are needed due to the shear volumes of sensors for a comprehensive network

Technology leader is developing system that will be 90% accurate

Low Power WAN: Use Case Oxygen Tank Monitoring

LP WAN Value:

- 5 YR Battery life
- Endpoint cost
- Recurring charge cost



Huge efficiency gains are realized by tank monitoring

Tanks are replaced at predetermined intervals regardless of need

Sensor batteries need 5 years = same as tank life

- Cellular unsuitable

Low Power WAN makes business case

- Recurring charges $\frac{1}{4}$ of cellular

Bouygues Telecom contracted for 5M tanks in France using Low Power WAN Network

Low Power WAN: Use Case

Propane Tank Monitoring



LP WAN Value:

- 10 YR Battery life
- Endpoint Cost
- Reduces access cost
- Wide Area needed

One of the nation's largest propane dealers w/over 2M tanks on the east coast of NA

2014 propane demand cause shortages and delivery delays of up to 3 weeks

Current system for estimating tank levels results in an average of 50% tank levels across the board

W/real time monitoring, tank levels would rise to 75% and connection to SAP would avoid shortages

Currently monitoring is done only in extreme cases due to cost

ROI is realized thru inventory cost reduction, avoiding shortages, and reduced waste in labor allocation.



Low Power WAN: Use Case Localization / Asset Tracking

LP WAN Value:

- 10 YR Battery life
- Endpoint cost
- Reduces access cost
- Wide Area needed



Ability to track and locate industrial assets

Trimble / RF Code deploying more than 6M sensors annually

Agriculture:

- Large yards: Tools and equipment
- Variable assets: Fertilizer, Cotton bales
- Powered assets: Tractors, vehicles
- Flower growers: Tracking production thru POS



Environmental:

- Landfill: Regulated. Waste disposal tracking
- Kodak: Chemical container mgmt.
- Waste: Container mgmt.
- Railway: Container mgmt.
- Shipping: Container mgmt

Low Power WAN: Use Case Smart Vending

LP WAN Value:

- 5 YR Battery life
- Endpoint cost
- Wide Area needed



Vending in process of being automated and monitored remotely

Monitoring provides visibility and accountability resulting in increased profits

- Efficient restocking
- JIT inventory management
- Preventive maintenance
- Location (theft prevention)

ROI includes labor and fuel efficiencies

Remote vending leader(s) have multiple pilot projects

Low Power WAN: Use Case Irrigation

LP WAN Value:

- 5 YR Battery life
- Wide Area / height
- Low cost sensors



Current system valve controllers have limited range and are hard wired

Cost and maintenance of hard wired systems are extremely high

All 3 leaders are designing wireless systems to monitor soil condition

There are over 15k golf courses in the US

LP WAN makes a business case by eliminating repeaters as control panels are not elevated

Low Power WAN: Use Case

Pet/People Tracking

LP WAN Value:

- 2 YR Battery life
- Wide Area
- Low cost sensors



Walt Disney spent \$1B for crowd control, data collection, and wearable technology

- One industry leader provides >2M tracking devices for theme park and event tracking

LoRa with location provides a cost effective, long life way to track pets and/or people



Low Power WAN: Use Case Oil / Gas Exploration

LP WAN Value:

- Solar powered GW repeater
- Wide Area
- Long range

In some cases cellular access is unavailable for remote oil / gas exploration sites

LP WAN allows for solar powered gateway repeaters to act as an interconnect to the cellular backhaul

Low cost, long range sensors can act to fill the void of rural connectivity

LP WAN repeaters can be placed on a pole using unlicensed RF bands – extremely low cost

Technology available today without touching base stations – range extension w/cellular backhaul



Low Power WAN: Use Case

Smart Parking

LP WAN Value:

- Battery life
- Low node cost
- Wide Area



Enables street level sensors and mobile apps to effectively manage complex parking in cities

- Better user experience via parking finder apps
- More revenue for cities

The average American spends \$1300/yr on parking

Data driven decisions are made by cities / over 50 cities deploying smart parking systems

“Parking” is an increasing urban issue to solve thru data and analytics



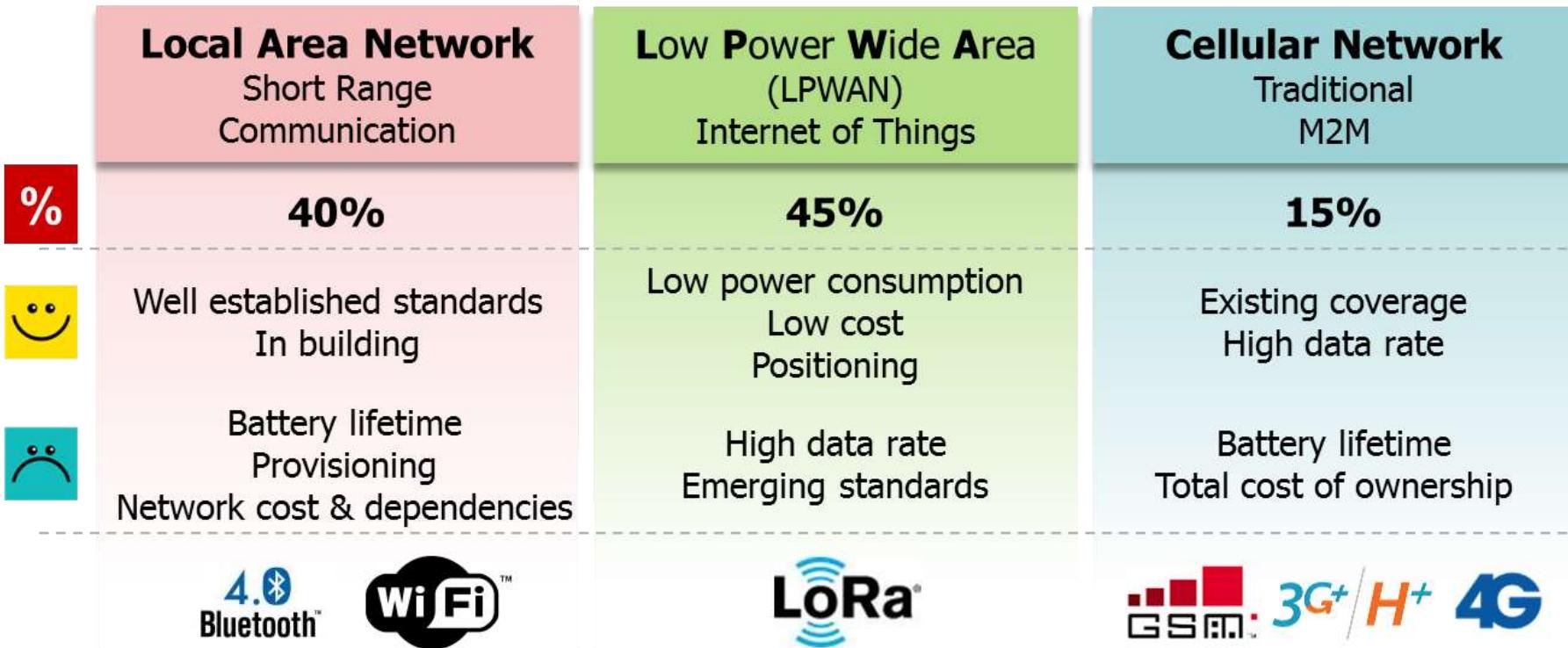
IoT necesita un standard abierto



- Licenciado vs no licenciado
- Propietario o standard abierto
- Largo o corto alcance
- Objetos móviles o fijos
- Alimentación con batería o red
- Bytes vs MBs

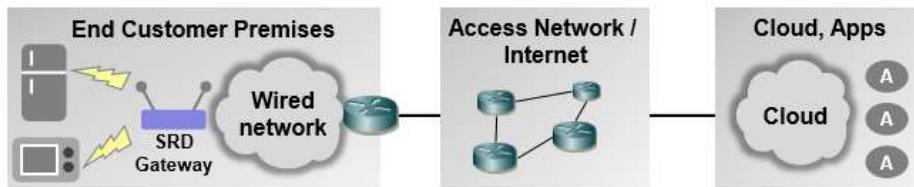


Dónde encaja LPWAN?



Short Range vs LPWAN

Short range radio connectivity for IoT devices:



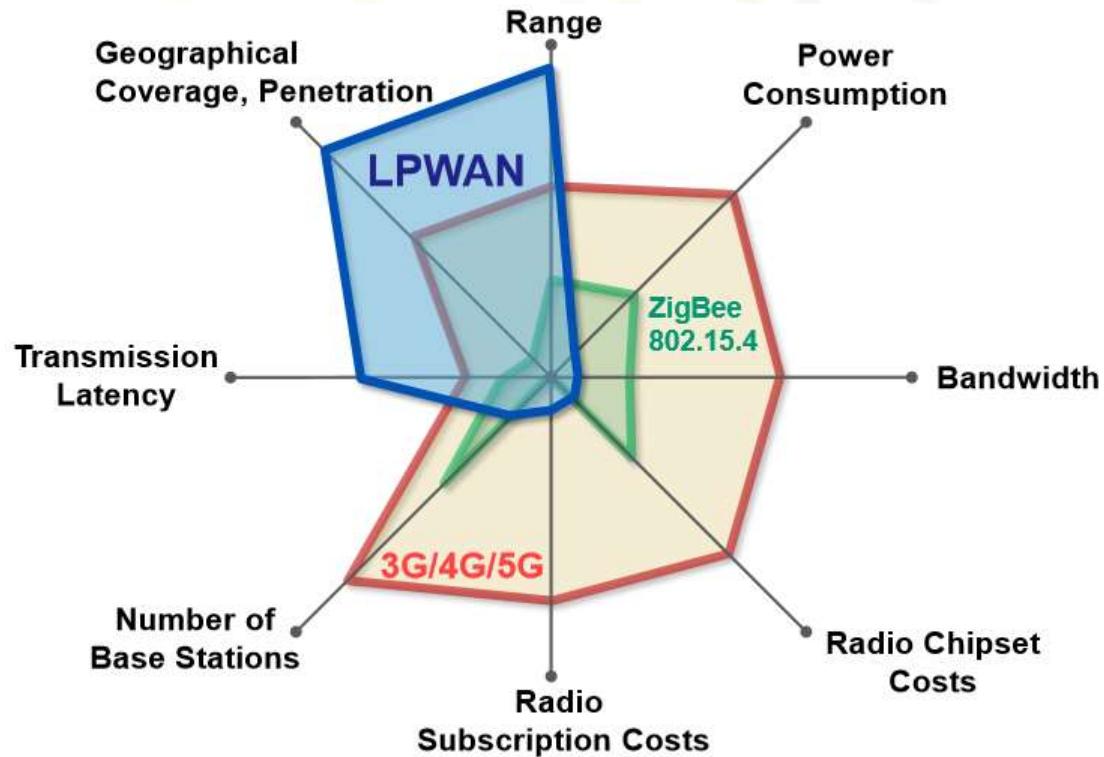
- Short range radio devices (SRD) such as ZigBee require using a gateway for long-range backhaul.
- The gateway is typically hooked up to some on-site wired network which is not under control of the IoT provider.

Direct long range connectivity (LPWAN) for IoT devices:



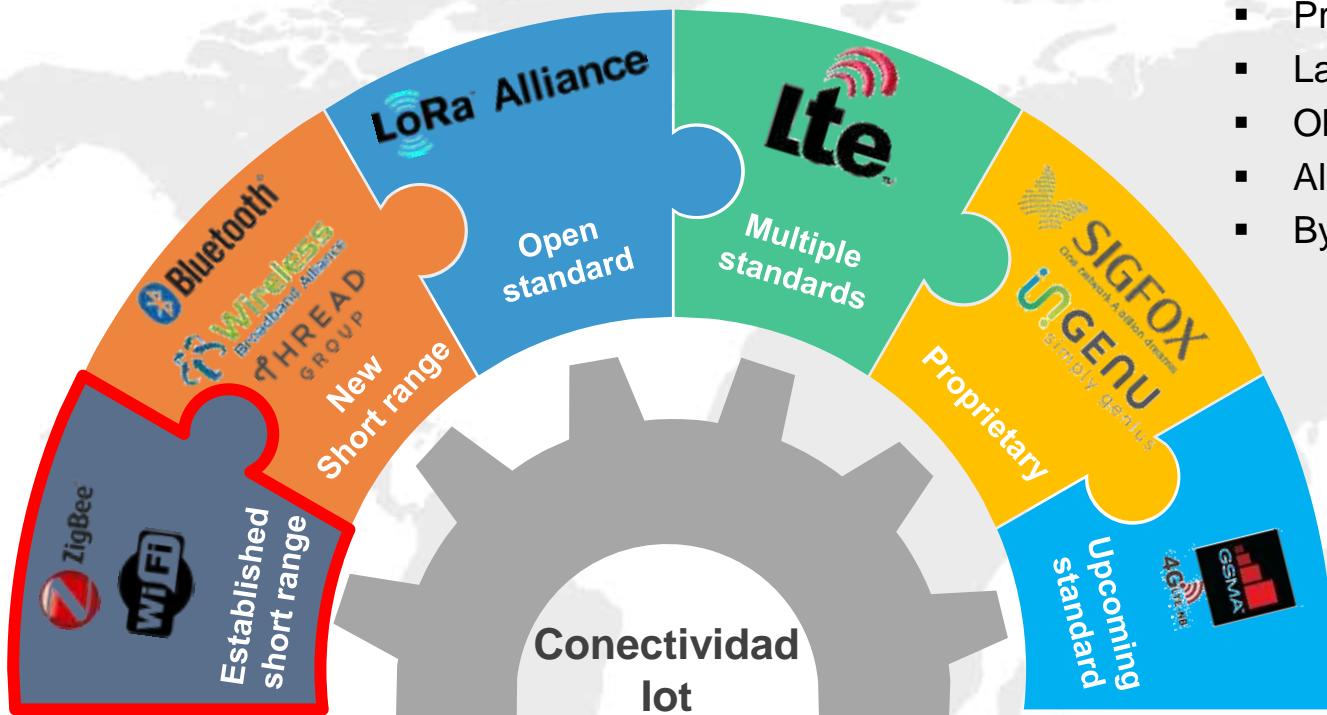
- Long range connectivity allows direct access to the devices in the field.
- The base station typically serves a large number of devices thus greatly reducing costs.

Ventajas y desventajas de las tecnologías



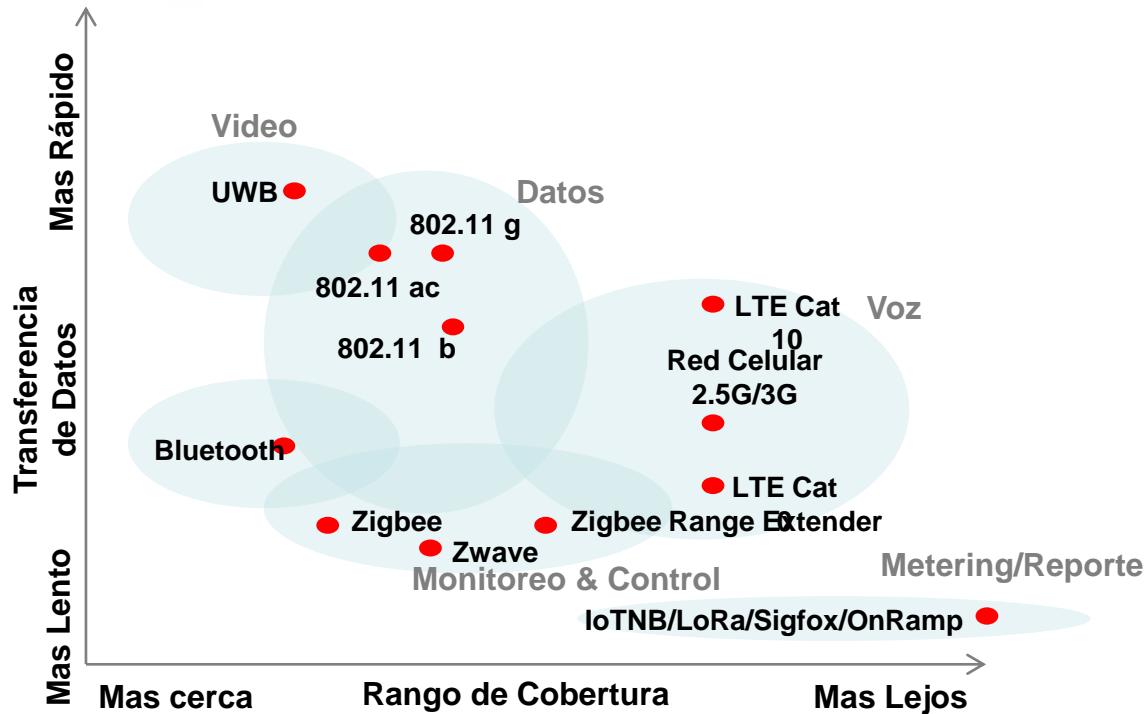


IoT necesita un standard abierto



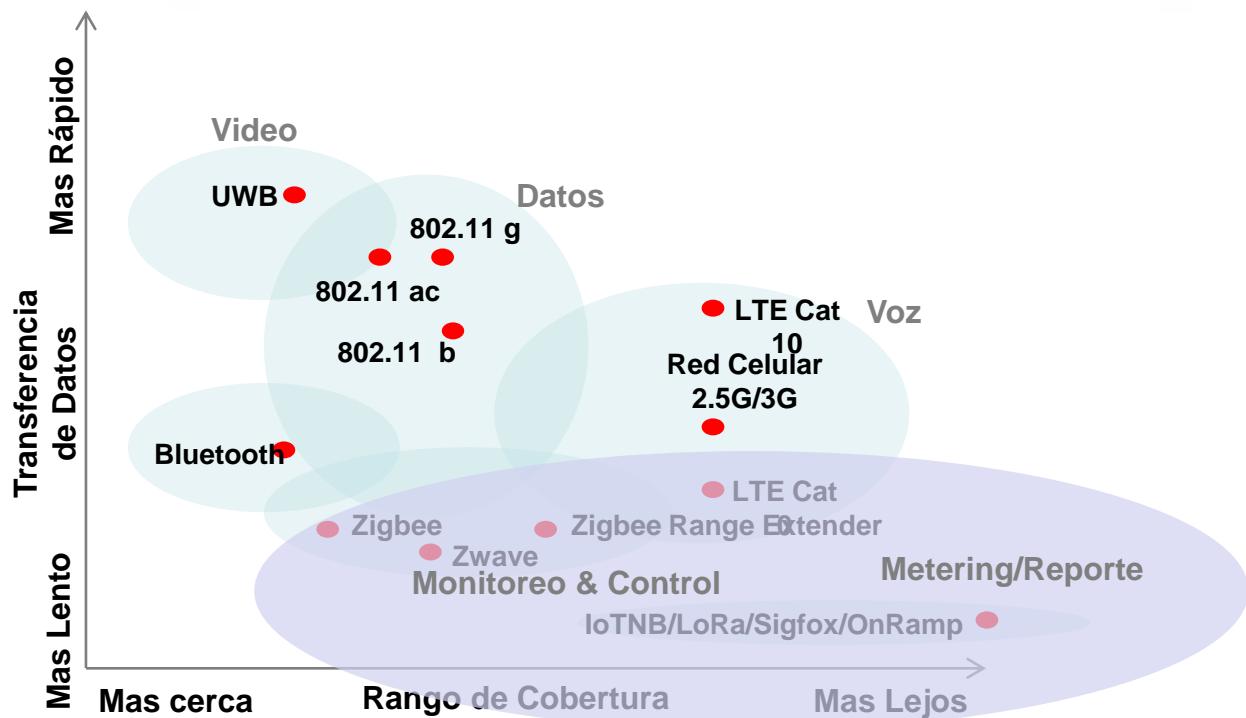
- Licenciado vs no licenciado
- Propietario o standard abierto
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- Bytes vs MBs

Mapa de Tecnologías Inalámbricas



UWB = Ultra Wide Band = <500MHz – 400Mbits/s

Mapa de Tecnologías Inalámbricas



UWB = Ultra Wide Band = <500MHz – 400Mbits/s

¿Zigbee?

- Soporte redes de mesh.
- Batería de larga duración.
- Baja latencia.
- Hasta 65.000 nodos por red.
- 128-bit AES de cifrado para las conexiones de datos seguras
- Solución de bajo coste.
- Estándar abierto para facilitar la interconectividad



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Muy
Importante

Esto significa intercompatibilidad entre marcas...

WH-204	Thermostat Control Unit HVAC (Zigbee)		
WH-206	Thermostat HVAC - 24VAC		
WH-222	Thermostat HVAC - 24VAC		
WH-254	Thermostat HVAC - 24VAC & Milivolts		
WH-211	Inwall ON/OFF Switch - 10 Amp High Power (220VAC)		
WH-212	Inwall Dimmer Switch for LED (220VAC)		
WH-213	Inwall Switch for Curtains and Roller Shutters (220VAC)		
WH-214	Open Close Sensor		
WH-215	Motion and Temperature Sensor		
WH-216	Temperature and Humidity Sensor		
WH-217	Water Leak Sensor		
WH-218	Electric Current Sensor (Up to 50 Amp with 3 Clamps)		
WH-219	YRL Deadbolt Touchscreen		
WH-220	YRL Leaver Touchscreen		
WH-221	LED A19 Monochromatic Zigbee ZLL - 220VAC		
WH-222	LED Light A19 RGB Zigbee ZLL - 220VAC		
WH-223	LED PAR16 RGB Zigbee ZLL - 220VAC		
WH-224	LED Power Strip 3mts Zigbee ZLL - 220VAC		
WH-243	Light Bulb A19		
WH-226	Power Plug ON OFF		
WH-225	Power Plug Dimmer		
WH-228	Power Plug ON OFF Switch with Metering		
WH-229	Power Meter Relay Switch		
WH-232	Battery-Powered Light Switch		

Sin dependencia tecnologica...

WH-233	AC-Powered Light Switch		WH-236	Temperature and Humidity Sensor		WH-242	AC-Powered Indoor Siren	
WH-234	Roller Shutter Control (Motor Control)		WH-237	Door Contact		WH-253	Battery-Powered Indoor Sirene	
WH-235	Roller Shutter Control (for Shutters with Control Units)		WH-238	Door Contact with Vibration Sensor		WH-249	Relay Controller 5V	
WH-228	Power Relay Switch		WH-239	Motion Sensor		WH-250	Relay Controller 12-24V	
WH-229	Power Meter Relay Switch		WH-240	Smoke Detector		WH-251	ZigBee Relay Controller 110-230VAC	
WH-230	Power Dimmer Switch Series		WH-241	Carbon Monoxide Detector		WH-252	Outdoor Bell Box	
WH-231	Power Metering Dimmer Switch		WH-244	Lamp Module Plug		WH-246	DIN Rail Power Meter Switch	
WH-208	Presence Tag (15mts)		WH-245	Appliance Module Plug		WH-210	Infrared Emmitter (IR)	

Ni desarrollo de parches o modificaciones de Software para soporte de nuevos productos...

WH-247	Thermostatic Radiator Valve		WH-255	Classic A White		WH-255	Sensor de Apertura y Cierre Compacto	
WH-248	Light Switch-3Way Switch (US)		WH-256	Classic A RGB		WH-256	Sensor de Movimiento Compacto	
WH-249	Circular Lamp		WH-257	Classic A 60		WH-257	Luz de Noche y Router con Bateria (Enchufe tipo Americano)	
WH-250	White Garden Lights (nine IP66 bulbs)		WH-258	Classic B		WH-258	Apertura y cierre de Garage	
WH-251	RGB Garden Lights (nine IP66 bulbs)		WH-259	PAR White		WH-259	Tecla Pared Inalambrica	
WH-252	Spot White		WH-260	PAR RGBW		Products with WiFi & Zigbee PRO HA Connectivity		
WH-253	Surface Spot		WH-258	Boton a Baterias		WH-102	WeHaus Hub - Zigbee PRO HA 1.2 - Wifi b/g/n - Plastic Case	
WH-254	RGBW Flex		WH-259	Switch Mecanico		WH-103	WeHaus Hub - Zigbee PRO HA 1.2 - Wifi b/g/n (2) - Aluminum Case	



IoT necesita un standard abierto

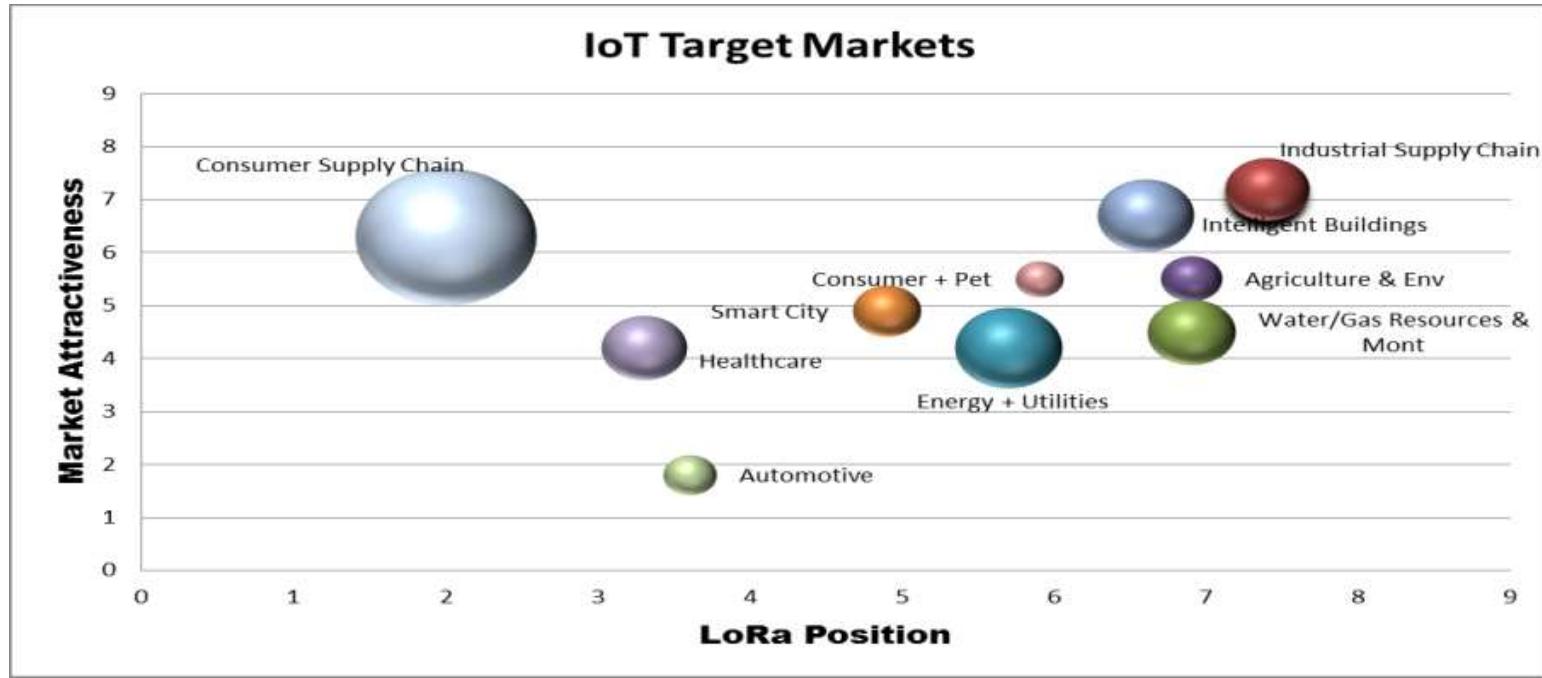


- Licenciado vs no licenciado
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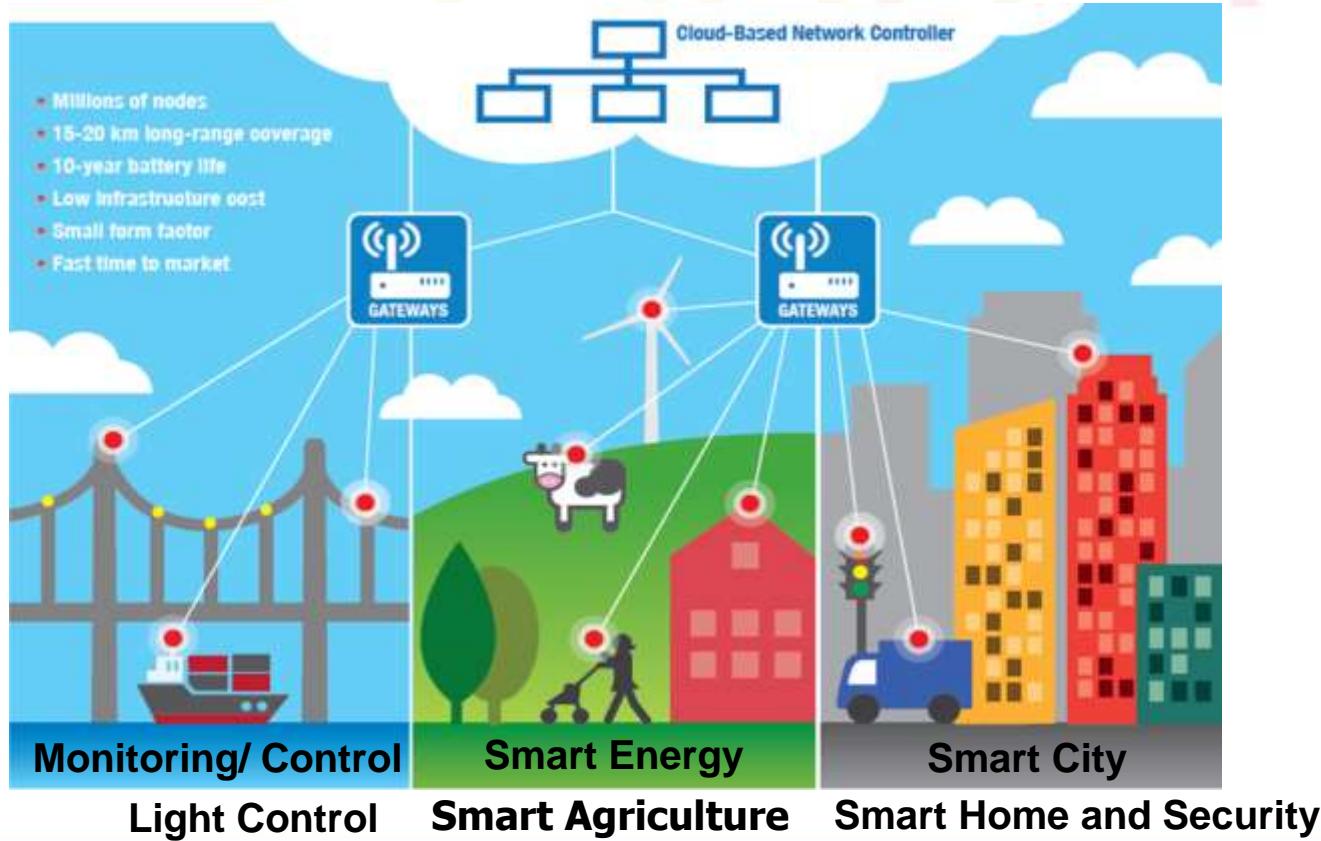


Vertical Positioning

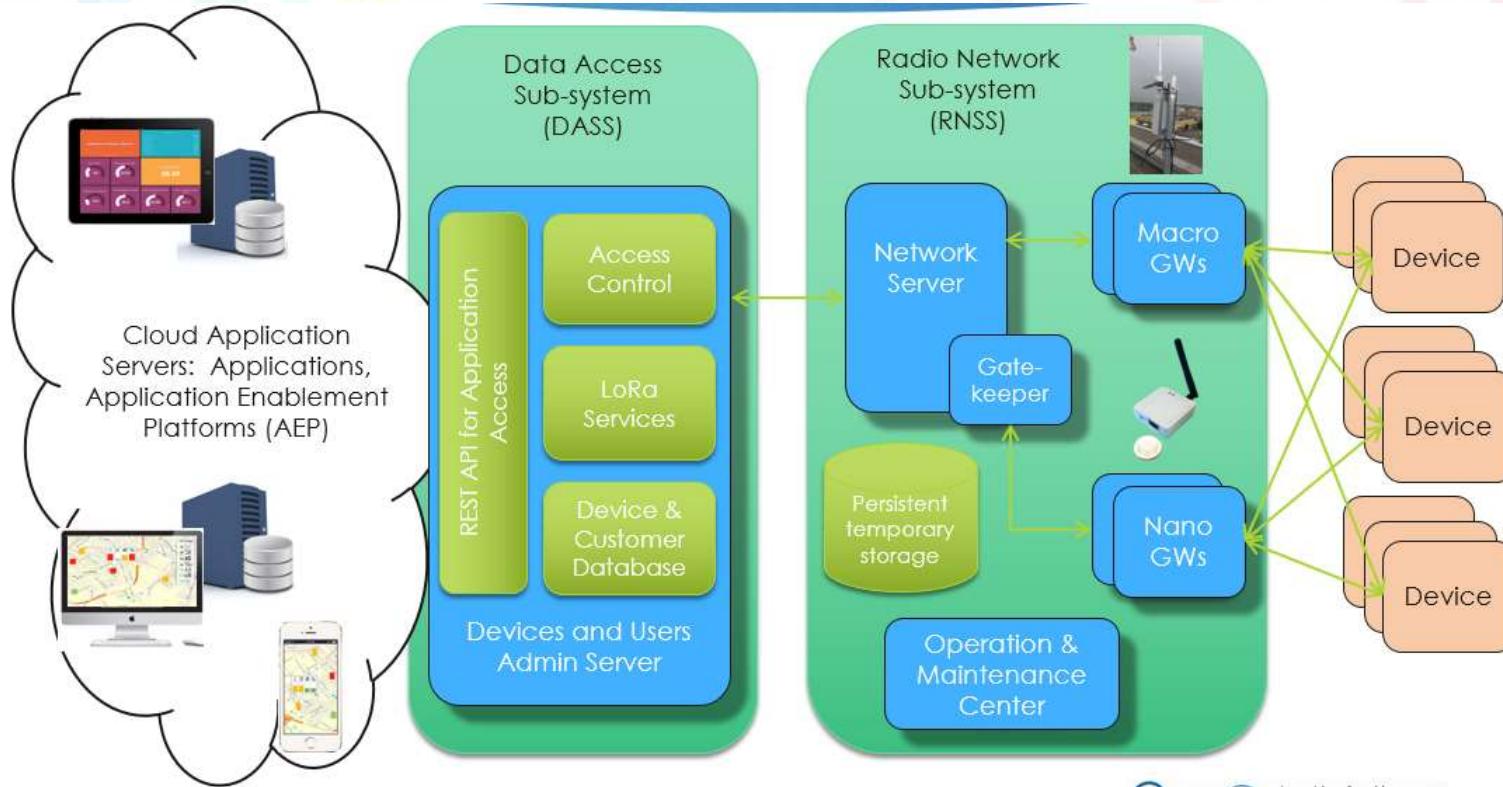
- Size of bubble indicates size of market



Microchip LoRa™ Technology IoT



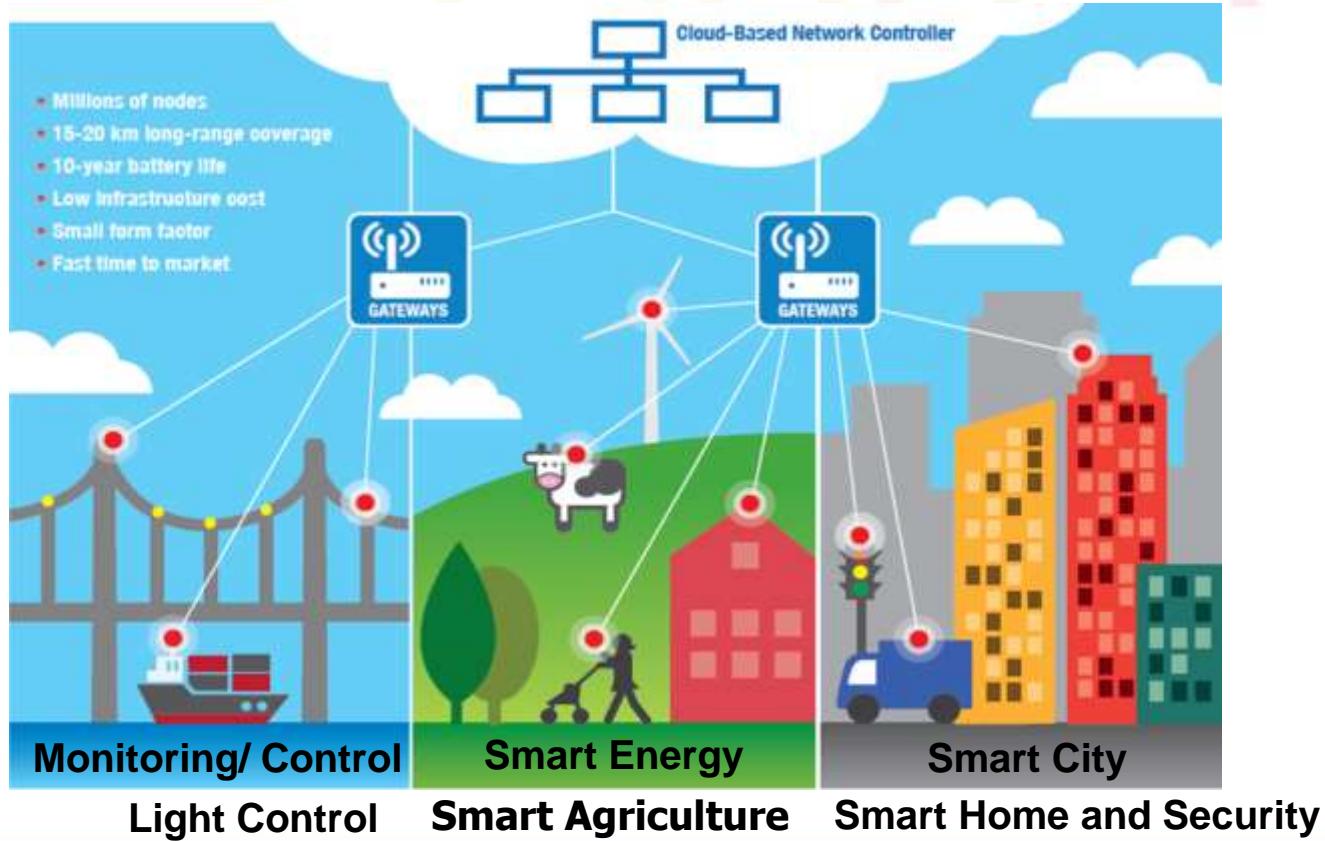
EI Network Server



CONFIDENTIAL

 OrbiWise

Microchip LoRa™ Technology IoT



EI Gateway

Wirnet Station



→ Pioneer. First LoRa™ Gateway in the market.

- Industrialized since February 2014
- More than 5000 units produced.

→ Exclusive features

- Specific saw filters in order to limit impact of LTE
- Real time radio scanning
- ERP up to 27dBm for EU, 30dBm for US & Asia
- Natively rugged & outdoor

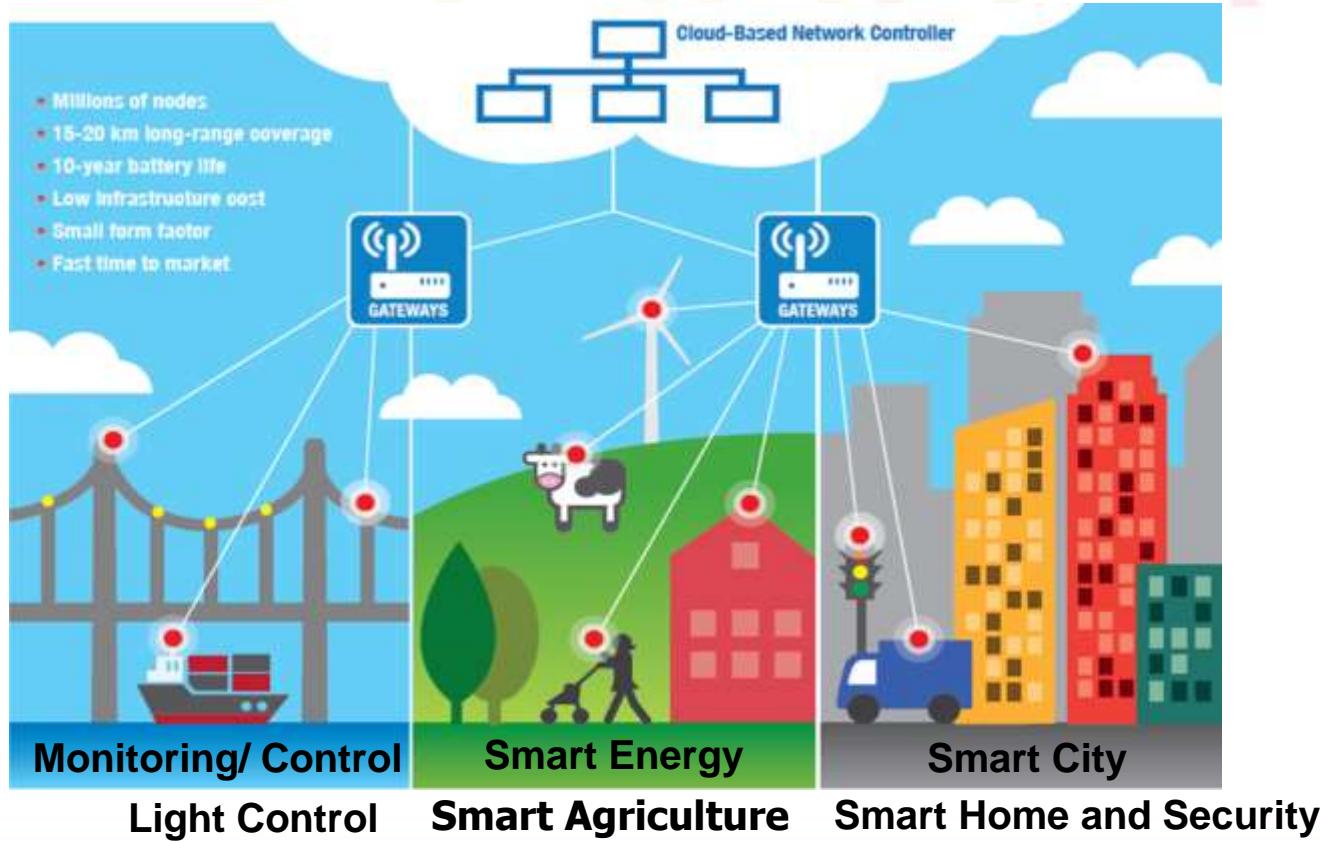
→ 4 versions : 433/868/915/923 MHz

- certified CE/FCC/IC/KC (and a lot of CB schemes)

→ Compatible with all Core Network providers :

- Actility, IBM, Loriot, Orbiwise, Stream Technologies, The Things Network, ...

Microchip LoRa™ Technology IoT



EI End Device



IR868LR



PB868LR



CM868LR



CO868LR



What is LoRa™ Technology?



A combination of two major concepts:

- **LoRa™ spread spectrum modulation**

- Provides the core long range capability
Up to 5km range in urban environment, up to 15km suburban
- Developed by Semtech, built in to SX127x transceivers
- SX1301 gateway baseband allows multiple receive channels

- **LoRaWAN™ network protocol stack**

- Provides the cellular network (aka large-star topology)
- Defined by IBM & Actility, made open by the LoRa™ Alliance
- Promotes a subscription-based business model
- Microchip developed/owns/maintains LoRaWAN for our end-node and aims to become the “golden” node

What is LoRa™ Technology?

□ A long-range and low-power sub-GHz modulation

At +14dbm output power, 868MHz:

- Up to 5km range in urban environment, up to 15km suburban
- >10 year battery life capability

□ Provides robust communication links

- Not susceptible to interference from Wi-Fi, Bluetooth, GSM, LTE, etc

□ Spread Spectrum gives improved capacity

- Connect more nodes, 100k to 300k nodes

□ High accuracy localization and ranging capability (future feature)

- Modulation format permits high accuracy localization
- Not RSSI based and accounts for multi-path and fading
- Permits high value additional features

LoRa™ Coverage Test

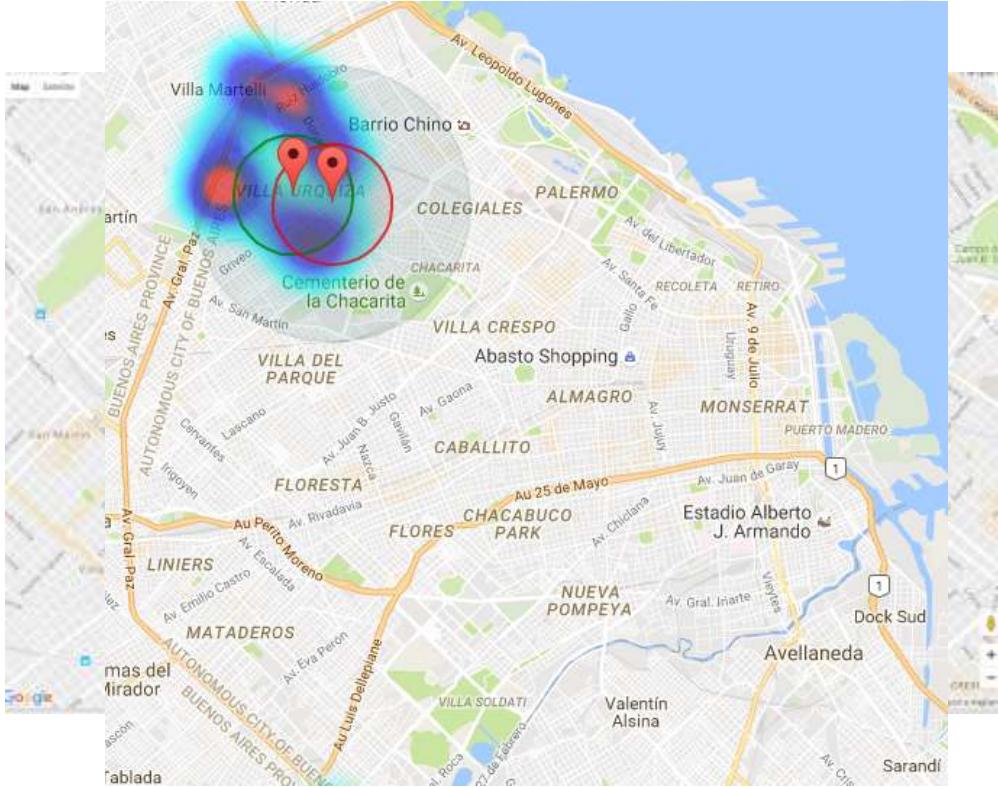


Longest Range Coverage !

- Coverage map from a single gateway/concentrator located on Cisco Webex building in San Jose
- >20miles to San Bruno
- A conservative 1 mile radius allows for in-building penetration even at the edges
- 7 Gateways cover all of lower Manhattan



Medición en CABA



What is LoRaWAN™ Protocol?

(WAN = Wide Area Network)

- A Bi-directional, Secured, Cellular Network
- Designed for low data-rate (~100bps), low duty-cycle (~10mins), high capacity (~100k nodes) & long battery life (~10yrs)
- Developed, maintained and promoted by the LoRa™ Alliance
- Microchip is a founder member and sits on Strategic, Marketing & Technical committees
- Microchip developed own end-node implementation



True Location

- In/out door
- Accurate



Bidirectional

- Bidirectional
- Scalable Capacity
- Broadcast



Global Mobility

- True Mobility
- Seamless
- Roaming



Security

- Unique ID
- Application Key
- Network Key

LoRaWAN™ Network Features



Long Range

- ✓ Greater than cellular
- ✓ Deep indoor coverage
- ✓ Star architecture

Max Lifetime

- ✓ Low power optimized
- ✓ 10-20yr lifetime
- ✓ 10x vs cellular

Multi-usage

- ✓ High capacity
- ✓ Public network

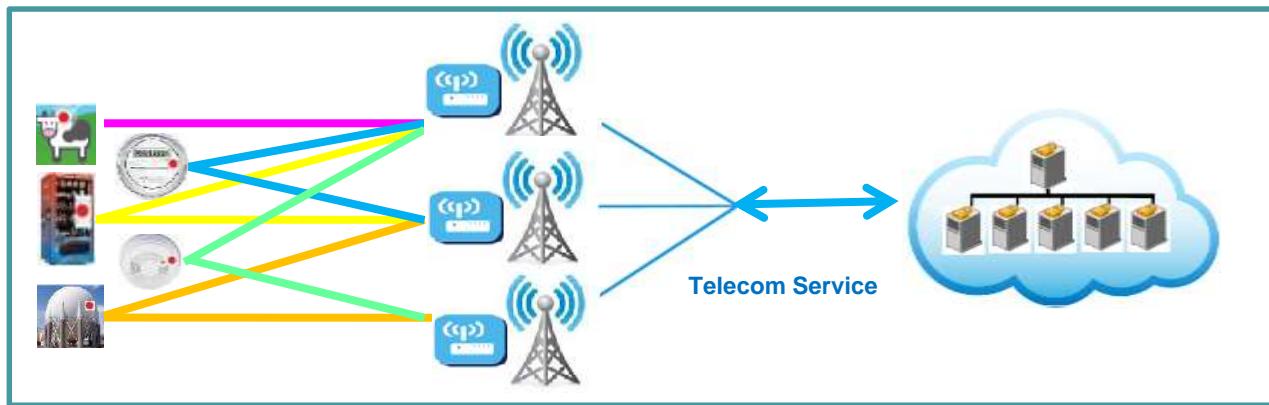
Low Cost

- Minimal infrastructure
- ✓ Low cost end-node
- ✓ Open SW



LoRaWAN™ Infrastructure

- ❑ Private network
 - ❑ Individually managed networks



Microchip LoRaWAN™ Modem

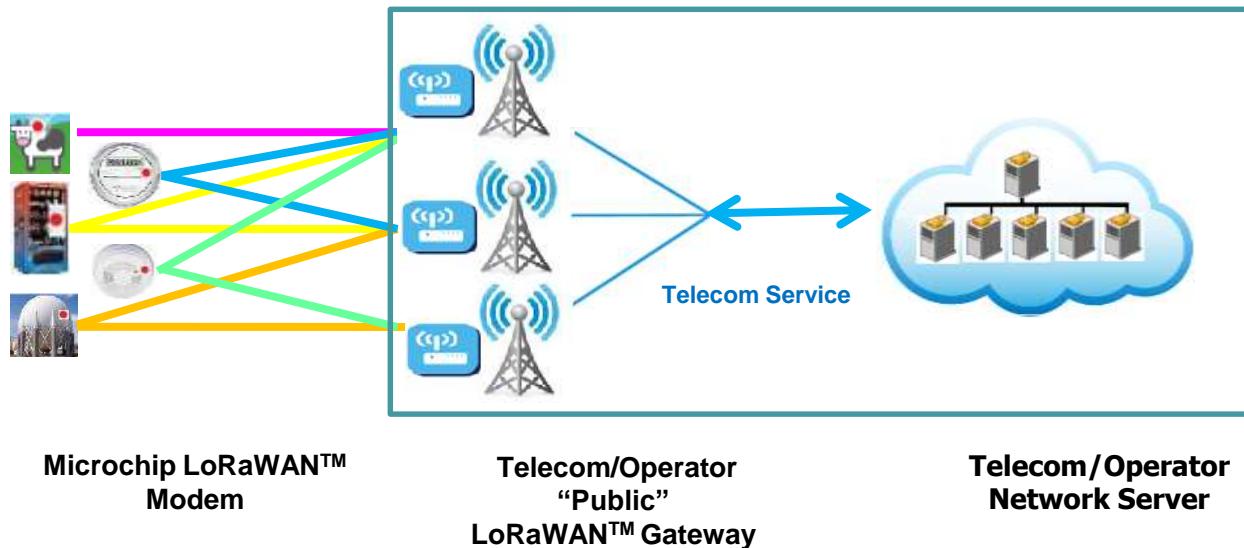
Private
LoRaWAN™ Gateway

Private Network
Server

LoRaWAN™ Infrastructure

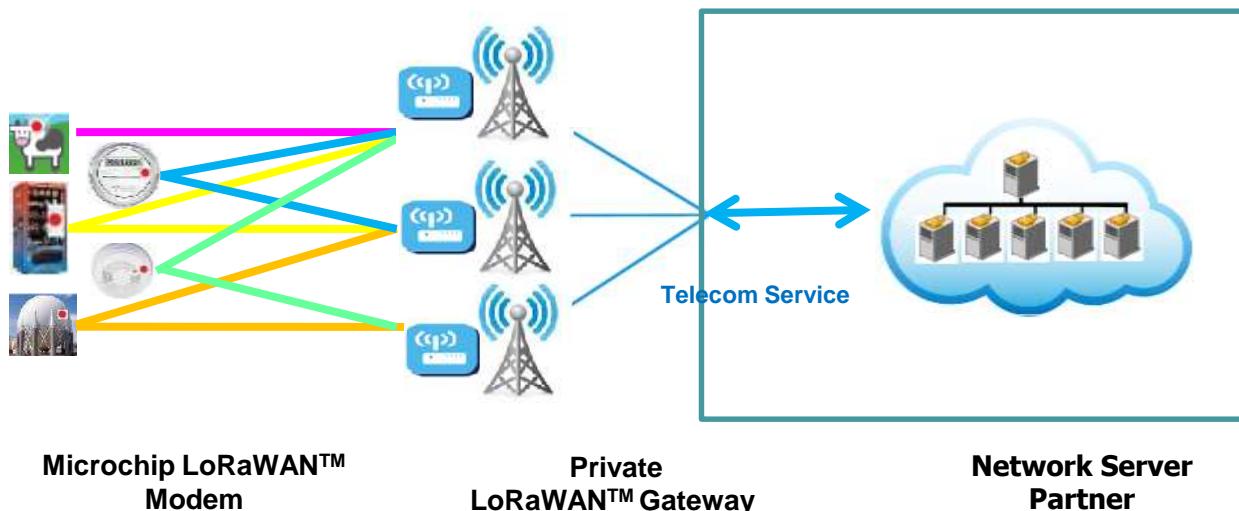
□ Public network

- Telecom/operator managed networks and gateway



LoRaWAN™ Infrastructure

- Public/Private Hybrid network
 - Telecom/operator managed server with private gateway



Case Study: Senet (USA)

- **A single business case was enough to justify building a private LoRaWAN network**

- Heating fuel (propane) delivery to residential properties
 - Previously inefficient – were filling cautiously when still 50% full
 - Adding cloud-connected level sensor reduces 2 to 3 deliveries / year
 - Also creates customer interaction, fuel level data is viewable online
 - Looked at cellular (too power hungry) and WiFi (intrusive to customer's network) but found LoRaWAN to be the best solution

- **Once established, Senet is able to open this LoRaWAN network as a public service**

- Multi-tenant business model further improves revenue and ROI
 - Expands network, improves density & capacity
 - 'Almost instant' availability of a public network

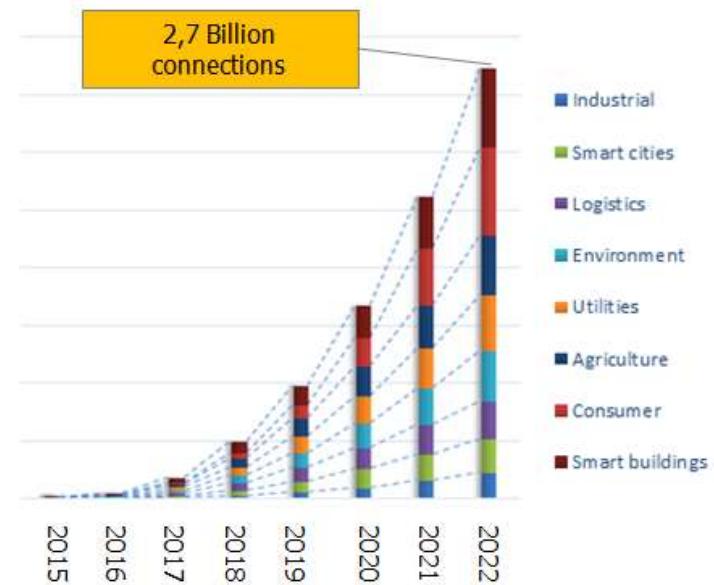
Technology Comparison Summary

Feature	LoRaWAN	Narrow-Band	LTE Cat-1 2016 (Rel12)	LTE Cat-M	NB-LTE
Modulation	SS Chirp	UNB / GFSK/BPSK	OFDMA	OFDMA	OFDMA
Rx bandwidth	500 - 125 KHz	100 Hz	20 MHz	20 - 1.4 MHz	200 KHz
Data Rate	290bps - 50Kbps	100 bit/sec 12 / 8 bytes Max	10 Mbit/sec	200kbps – 1Mbps	~20K bit/sec
Max. # Msgs/day	Unlimited	UL: 140 msgs/day	Unlimited	Unlimited	Unlimited
Max Output Power	20 dBm	20 dBm	23 - 46 dBm	23/30 dBm	20 dBm
Link Budget	154 dB	151 dB	130 dB+	146 dB	150 dB
Battery lifetime - 2000mAh	105 months	90 months		18 months	
Power Efficiency	Very High	Very High	Low	Medium	Med high
Interference immunity	Very high	Low	Medium	Medium	Low
Coexistence	Yes	No	Yes	Yes	No
Security	Yes	No	Yes	Yes	Yes
Mobility / localization	Yes	Limited mobility, No loc	Mobility	Mobility	Limited Mobility No Loc



LPWAN Market Size & Focus

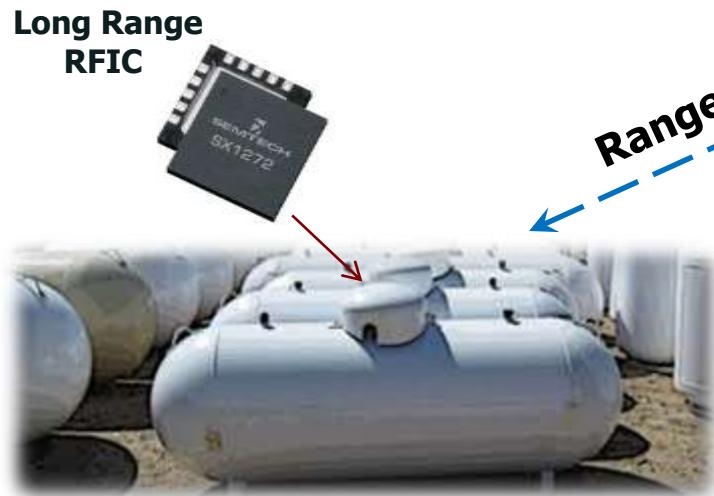
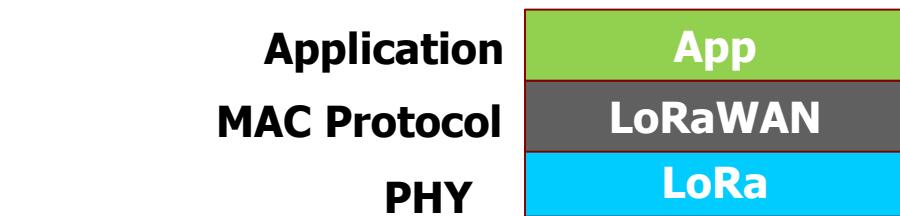
- Machina, Strategy Analytics and Analysys Mason
 - Excluding short range
- Turning point 2018
- The top three application categories for this revenue forecast (2022)
 - Agriculture and environment markets (25%)
 - Consumer applications, which include pet, bicycle tracking and wearable's (21%)
 - Smart buildings (18%)



Source: Analysys Mason, April 2015



What is LoRa?



Range > cellular at fraction of power

LoRa Gateway



- = **5-10 year battery life**
- = **5x lower sensor cost than cellular**
- = **Low cost basestations (<\$100 to \$2500)**
- = **Rapid time to market**
- = **Mobile objects**
- = **Geolocation w/o GPS**



Open LoRa®

□ LoRa® PHY

- Semtech developed
- Multiple sources available
 - Semtech
 - Microchip
- Available in frequency bands from 400MHz through 1GHz

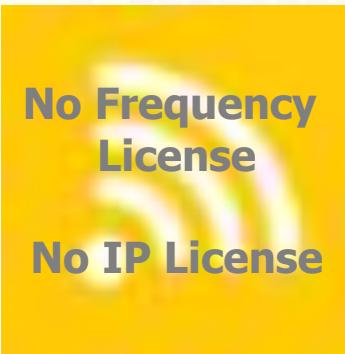


□ LoRaWAN™

- Open standard maintained by the LoRa Alliance
- Defines frequency band usage by country, security, device classes, protocol, etc
- Supported by a broad ecosystem

□ Applications

- Can be developed independently and run over any connectivity infrastructure as part of an integrated solution incorporating many technologies.



PHY

LoRa

MAC Protocol

PHY

LoRaWAN

LoRa

Application

MAC Protocol

PHY

App

LoRaWAN

LoRa

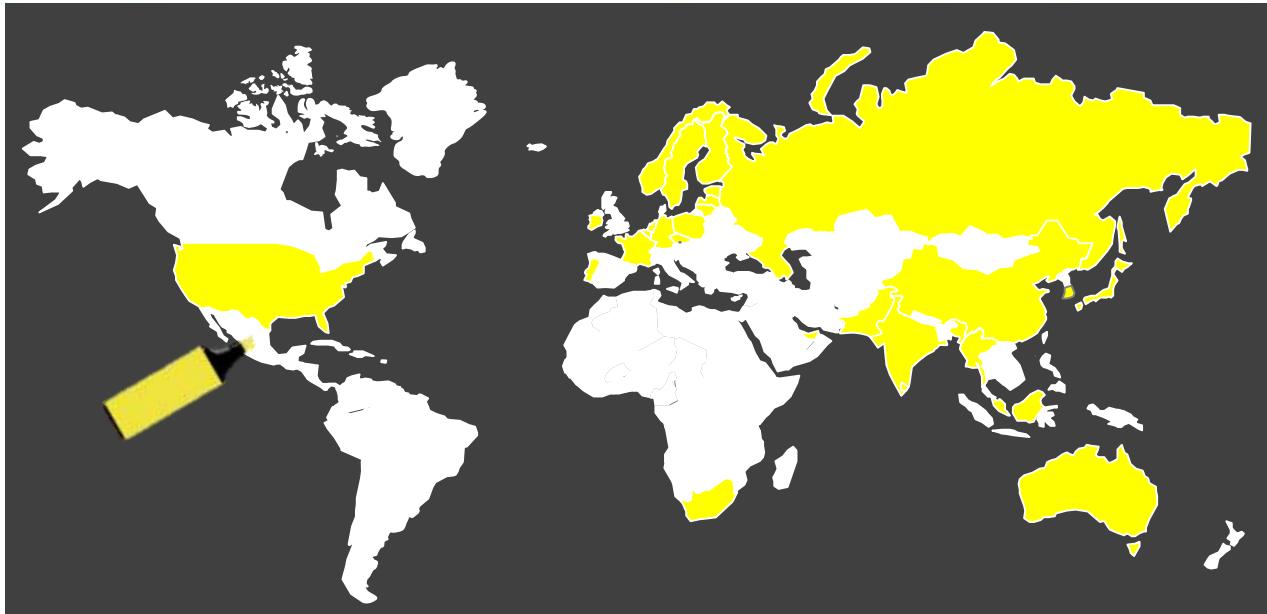
LoRa Alliance™

- Open & Non-Profit
- Founded: March-2015
- Board
 - IBM, Cisco, Bouygues, KPN, Orange, Semtech, Proximus, ZTE, ST, Actility, Kerlink, Agutek, Homerider
- Chairman
 - Geoff Mulligan
- Committees
 - Technical: Nicolas Sornin, Semtech
 - Marketing: Tracy Hopkins, EveryNet
 - Strategy: Stephen Caldwell, Microchip
 - Certification: Derek Hunt, Actility
- Member Status
 - 400+





Turning the World **YELLOW**, Public Network Operators

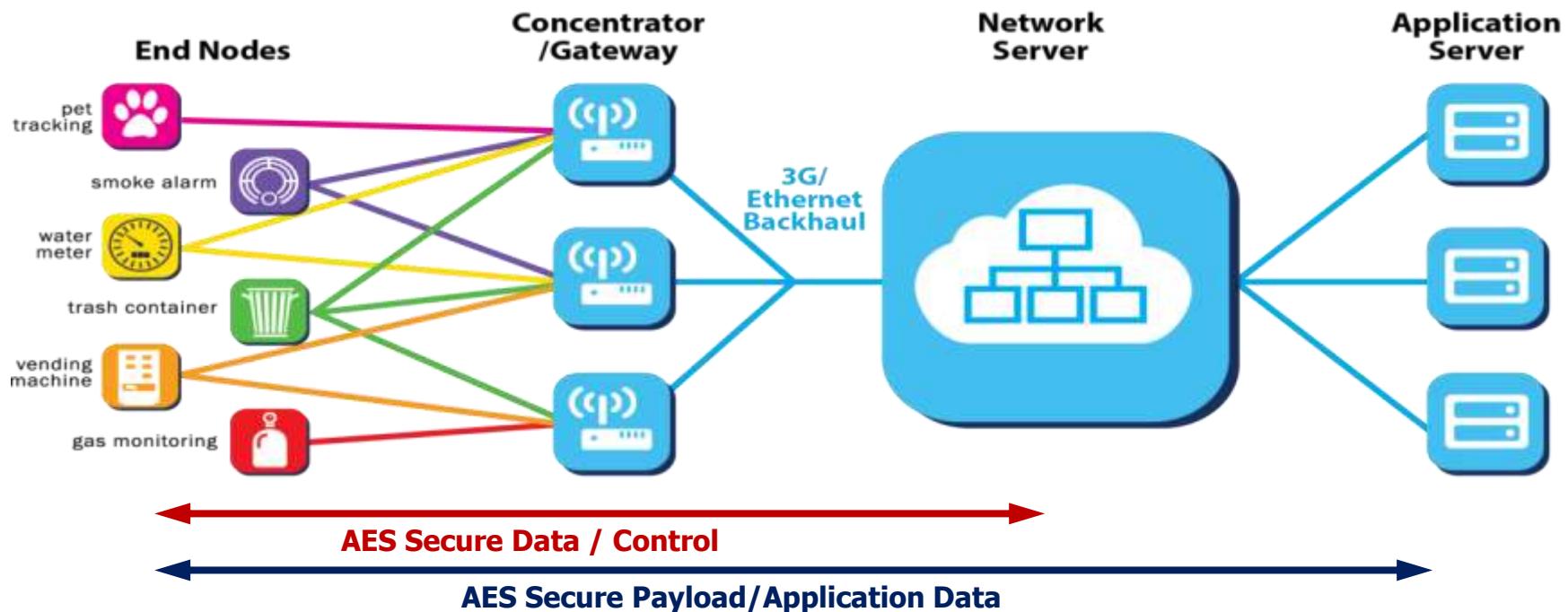


- 16 announced Public Operator (MNO) IoT deployments
- 56 on-going operator trials
- 400+ members in the Alliance





LoRaWAN™ Network Concept





Gateway and Deployment Models

Picocell Gateway



Industrial Gateway



Tower-top Gateway



Features

Price	\$50-100
Backhaul	Ethernet only
Options	minimal

Features

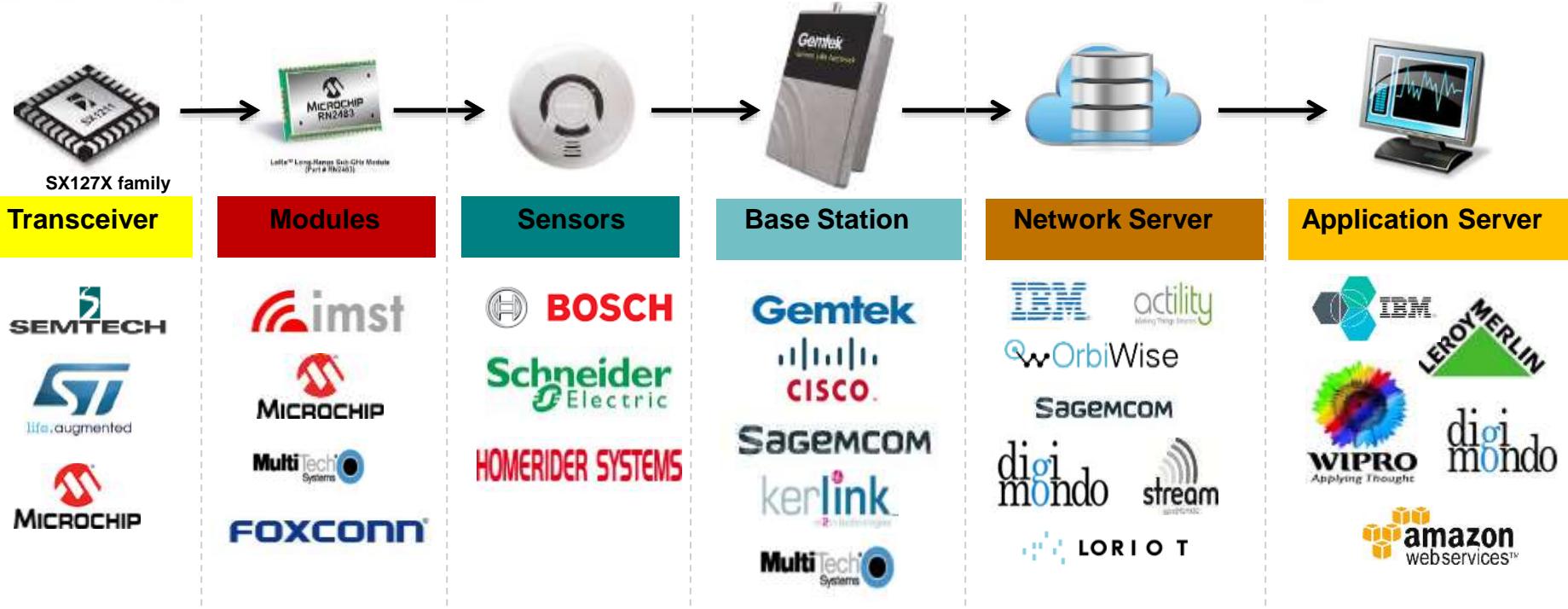
Price	\$250-400
Backhaul	Eth, cellular, WiFi
Options	configurable

Features

Price	\$1000-2000
Backhaul	Eth, cell, sat, fiber
Options	IP 67/68, lighting, batt

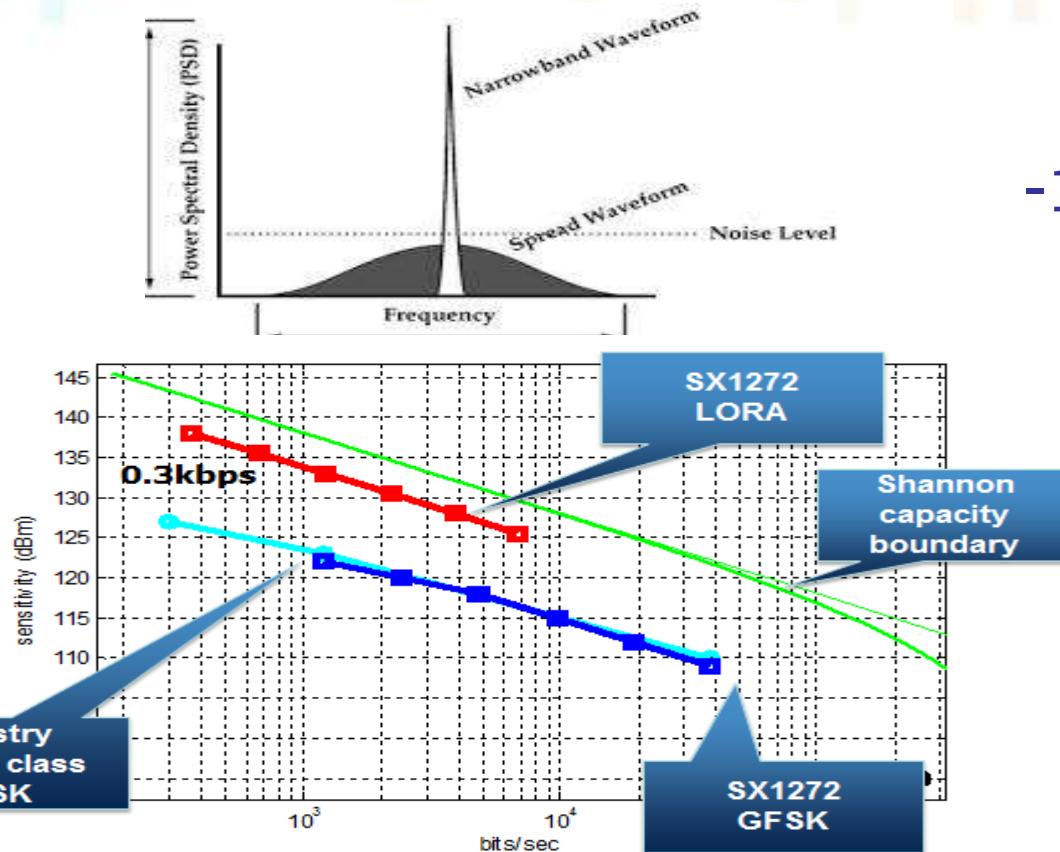


Multiple Sourcing On Every Level

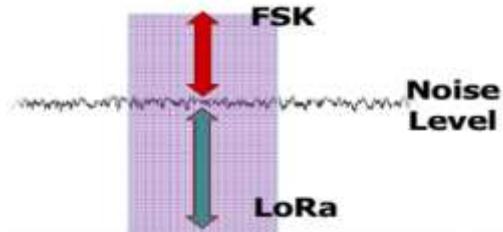




LoRa® PHY: Spread Spectrum Modulation

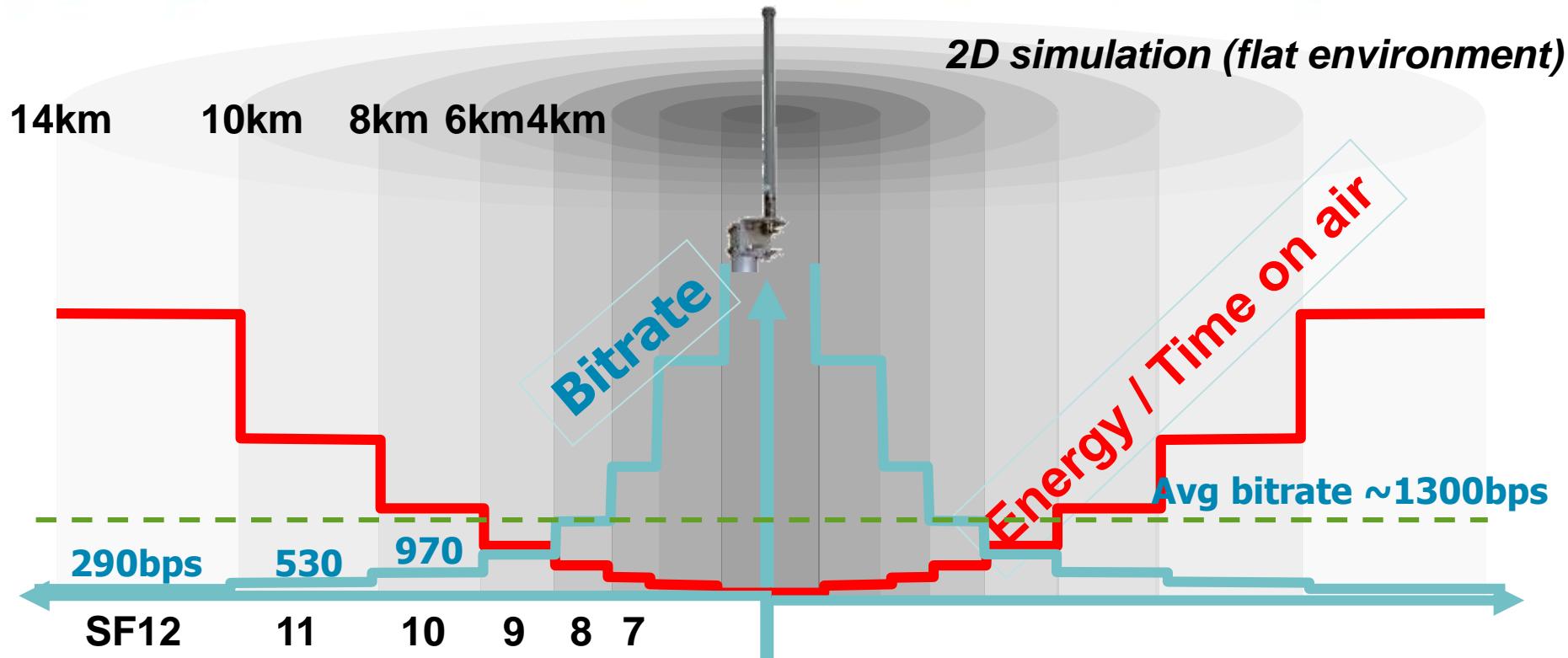


-132dBm @ 1 kbps
No TCXO #
No LNA





Fully Bi-directional: Adaptive Data Rate (ADR)





Device Classes & Examples



Class A: Smart City

Report status a few times per day
No planned actuation required
Extremely low energy



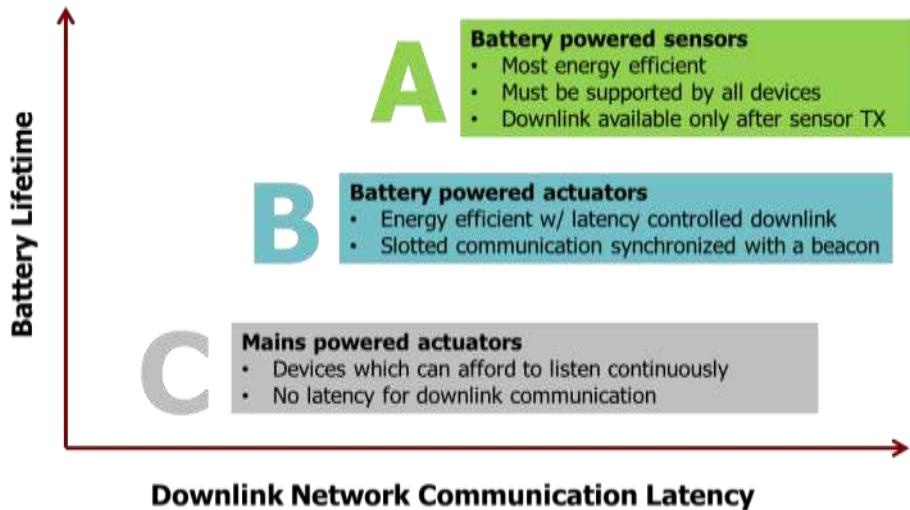
Class B: Irrigation

Turn valves on or off
with a few minutes latency



Class C: Smart Lighting

Constantly listens for network «ping»
for low-latency actuation





Geolocation Competitive Advantages



Lowest possible power

- No processing of location in the sensor (no GNSS receiver, CPU)
- No 'time on air' required to transmit the location data
- Location possible with the smallest possible LoRaWAN packet



Lowest possible cost

- No GNSS (or other hardware) in the sensor
- Smaller battery as no sensor power used in getting location
- Smallest size (electronics, battery, enclosure)



Lowest environmental impact

- Sensor hardware is minimised (electronics, battery, case size etc.)
- Many sensors will be fitted with lifetime battery





¿Preguntas?



¡Gracias!