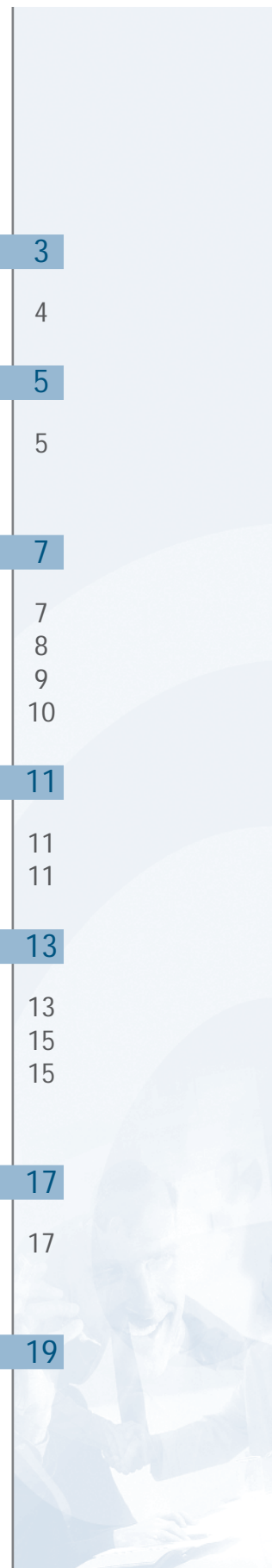
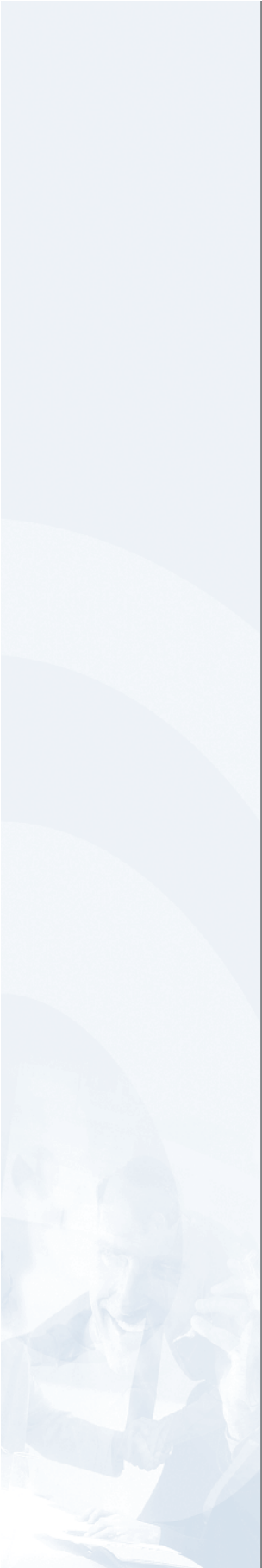


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Introduction

- This white paper on the corporate use of e-Learning solutions, and the associated issues, is a joint publication of IDC and Auralog.
- The focus is on methods and practices observed in companies as part of a process of learning one or more foreign languages.
- In this White Paper, we endeavor to do the following:
 - Identify issues related to learning languages in a professional setting
 - Identify practices related to the use of e-Learning solutions
 - Make recommendations for deploying an e-Learning program (best practices)
 - Highlight the benefits of an e-Learning solution
 - Highlight the outlook for progress and skill development by means of an approved evaluation system.
- In early 2007, to get a sense of the various ways in which e-Learning solutions were being used, IDC queried a number of European companies in very different industries that had implemented e-Learning solutions in highly specialized contexts.
 - Belgium: **GlaxoSmithKline Biologicals**
 - Germany: **Konica Minolta Europe**
 - United States: **Getronics**
 - France: **Alcatel-Lucent**
 - Spain: **Caja General de Ahorros de Granada**
- The purpose of this document is to highlight the issues associated with using e-Learning solutions, the different contexts in which they are used, and the benefits observed or anticipated.

Corporate e-Learning: Boosting performance

- e-Learning includes any training aid that uses the Internet as its means of broadcast. It is an educational experience that happens entirely or mostly on line. From the user learning independently to the virtual class with real-time tutoring, e-Learning solutions come in very varied forms.

- The maturity of technologies (laptops, extended networks, Internet) has fostered the emergence of e-Learning solutions. At the same time, the company environment, marked by the growing need to stay highly competitive, has made this type of solution especially well suited to meet the objectives of:

Adapting to changing contexts and responding to the market.

Globalization has singularly broadened the field of experience, and most of today's companies have dealings with foreign countries. So understanding one or more foreign languages has become a crucial component of doing business.

Improving skills in a cost-controlled environment. In keeping with the previous point, companies have fully grasped the interest of improving their employees' knowledge. Access to new knowledge has become a critical factor in staying competitive, but the process of improving skills must be part of an overall outlook of streamlining and controlling costs. Learning solutions are no exception. They must fulfill training needs within a controlled budget.

Creating a culture of learning. Once the product of isolated initiatives, learning programs are now understood to be critical factors in staying competitive, inasmuch as they are part of the company culture. e-Learning solutions encompass more users and, because they are adaptable, foster the organization's commitment to a cycle of continuous improvement.

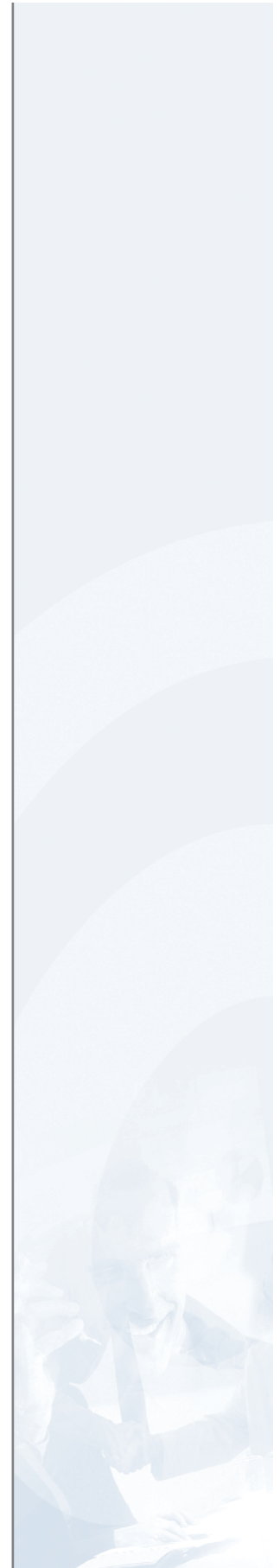
Boosting overall performance. In the contexts described above, in promoting the execution of business processes, there is a strong factor of alignment with company strategy. Users are vitally affected, because they are directly responsible for implementing that strategy. Measuring performance becomes the objective criterion for judging the strategy's success. In terms of skills, the use of relevant progress indicators will implement skills management. Auralog uses a progress test, the results of which will demonstrate how much progress has been made. These results depend on:

- » the student's starting level
- » the training method being used
- » the length of the training program

Companies, users and training: A strategic dimension

Optimizing processes: The key to staying competitive

- Globalization and technology have made radical changes in the way companies behave. **The notion of a market taken as a whole is giving way to niche markets that feature very different client behavior profiles.** This new deal means challenging skills processes that are ill-suited to these new demands, and using methods and processes that adapt the response to the market and accelerate the reaction to change.
- Corporate management is now putting process optimization at the center of its concerns. This is a fundamental development away from recent years, where earning market shares surpassed all other priorities.
- These new priorities, which are governing how strategy is shaped, are also determining everyday user reality. These users are increasingly versatile and able to act in more and more competitive environments. Now they are facing the need to maintain, even broaden, their already broad skill bases. One of the direct effects of globalization has been a broader framework of exchanges and, from there, employees from different countries being in touch.
- **Understanding one or more foreign languages has become a strategic issue that determines the company's responsiveness and the quality of its client relations.**
- As such, language learning has emerged from the realm of continuing education to become a tool in its own right for staying competitive.
- Along with this transformation, available tools have followed suit, drawing on the many options offered by the Web. e-Learning solutions, which were still marginal not long ago, are now enjoying broad use in companies and meeting these needs.



- Overall, it is the whole range of processes that governs the company's interaction with its changing environment, and the field of user training is no exception.

THE COMPANY AND ITS ENVIRONMENT

<i>Company</i>	<i>Yesterday</i>	<i>Today</i>
Vision	<ul style="list-style-type: none"> ■ Overall market ■ Product-focused 	<ul style="list-style-type: none"> ■ Niche markets ■ Client-focused
Strategy	<ul style="list-style-type: none"> ■ Focus on internal processes ■ Vertical processes 	<ul style="list-style-type: none"> ■ Refocus on core business ■ Outsourcing
IT Environment	<ul style="list-style-type: none"> ■ Centralized ■ Proprietary 	<ul style="list-style-type: none"> ■ Distributed ■ Multi-platform

Source : IDC, 2006

- More and more companies now outsource business processes that were once managed internally (BPO). However, as we will see in the various cases below, these same companies have grasped the interest of bringing training processes back in-house. And with the increasing importance of productivity and flexibility, e-Learning solutions are a viable option.

e-Learning for the company's business lines: A tangible contribution

- Companies that are streamlining all of their infrastructures have recognized the advantage of training their users. At the same time, they have weighed how best to optimize their return on investment and their introduction of training programs into the existing organization.
- And so the choice is theirs: traditional ("face-to-face") or online ("e-Learning") training.

e-Learning solutions and mobile users

- Face-to-face is the traditional learning method where a physically present person teaches classes to a group that meets for that purpose.
- The advantages of the face-to-face method are well known. Student-teacher proximity is an interactive factor that makes it easier to gauge progress. In principle, it lends itself to teaching in a traditional on-site user setting.
- On the other hand, the face-to-face method can be rigid, which can make it less effective in-house:
 - » **Scheduling:** This is the most common complaint about traditional learning solutions, which do not readily accommodate the imperatives of working life. Experience shows that lesson plans are often overcome by changing schedules, making it difficult to keep up with a curriculum.
 - » **Location:** By definition, traditional classes require that all users be available at the same time and place as the instructor. Here again, rigid organization can interfere with the regular progress of the course.
- In multi-site distributed environments, e-Learning solutions are adaptable, making it possible to accommodate various user contexts. They fit in well with unforeseen changes to schedules.



Konica-Minolta uses an e-Learning solution for technical and sales user populations. e-Learning is accessible outside the company via a dedicated platform. With this setup, a user may log on from outside to continue the learning cycle. Thus, Internet access to real-time e-Learning lets users return to the last level they had reached, whether inside or outside the company.

e-Learning solutions: Leveraging traditional training

- e-Learning solutions are also a valuable way to leverage traditional training methods. Because they are flexible, users can move on quickly to practical application. Many companies combine these two methods.
- Experience shows that unless there is practical application within a short time after traditional training, the benefits are lost fairly quickly. There is a “backslide,” with the user losing ground from one course to the next.

GlaxoSmithKline implemented a dual curriculum of traditional learning and eLearning for user populations from very different cultural environments. GlaxoSmithKline is especially keen on the two-method combination, because the effectiveness of the sessions depends directly on it.

GlaxoSmithKline also knows the importance of using the same person as an instructor for the in-person sessions and a tutor for the e-Learning sessions. The knowledge base is acquired by traditional learning methods, but it is the e-Learning method that allows students to move on to practice and maximize the programs’ benefits.

- e-Learning solutions help maintain skill levels, with minimal user stress. This is especially true when the instructor is there in person providing tutoring for the e-Learning solution.

Alcatel-Lucent is now using a blended learning solution: traditional in-person services with an instructor (face-to-face mode) and Auralog’s e-Learning solution (on-line mode). Alcatel-Lucent highlights the importance of including both teaching methods. The effectiveness of traditional instructor-led learning is multiplied when accompanied by an e-Learning solution. For Alcatel-Lucent, the two methods are so complementary that instructors are themselves trained in Auralog’s e-Learning solutions.

- It is clear that e-Learning is an effective solution for optimizing traditional instructor-led training and, in this context, much more productive. This optimization option is especially well-received, but that is not all. Indeed, in a competitive environment, distinctive criteria become important, and companies are very concerned that their learning solutions embrace and enhance the factors that set each business line apart.

Caja General de Ahorros de Granada uses both traditional instructor-led learning and e-Learning solutions. After systematically motivating employees to try out language learning via e-Learning, the bank now lets them choose one or the other method. On the whole, employees choose e-Learning in great numbers: for its introductory year in 2006, e-Learning drew 30% of trainees.

The company considers instructor-led and e-Learning modalities to be highly complementary. Absolute beginners almost always choose instructor-led lessons; providing continuous support and strong motivation, which comes from the group at their own level. Conversely, employees with basic language skills are increasingly likely to choose e-Learning: they value the solution's flexibility and enjoy using it on their own schedule (and moving up to higher levels).

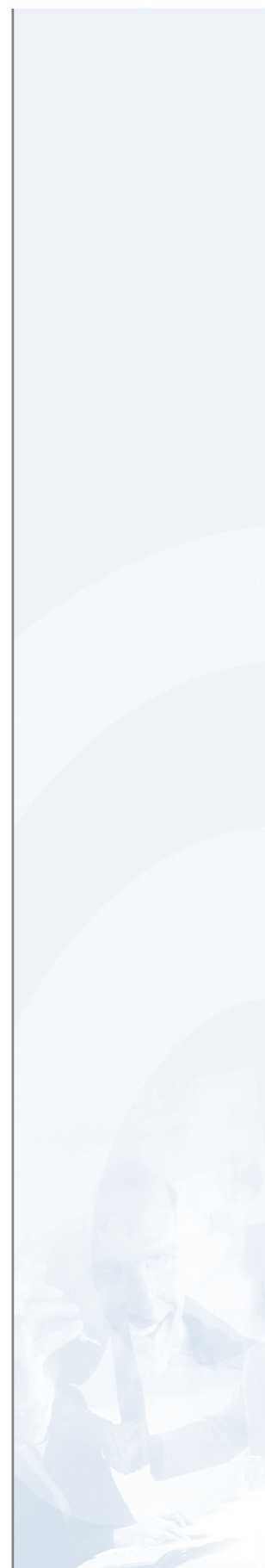
Business contexts: A wealth of added value


- Furthermore, when user profiles meet certain mobility criteria (see previous paragraph), a traditional solution can no longer meet their needs, except with tutorials, which is incompatible with optimizing and streamlining issues. As such, the adaptability of an e-Learning solution to a specific business context becomes especially appealing.

At Konica Minolta's European offices, technical documents for equipment sold by the company were sent from Japan directly translated into English. These documents had previously been translated into German by Konica Minolta's German subsidiary. In an effort at streamlining, the translation process was abandoned for certain documents being sent to technical service teams in Germany.

In this particular context, the company saw the opportunity to improve performance: rather than having a third party translate technical documents, the company decided to step up employees' skills, teaching them how to put their English into practice. And so Konica Minolta evaluated three e-Learning solutions on the market, and the deciding factor was the chosen solution's ability to incorporate specific technical content. In conjunction, Konica Minolta is offering its sales teams an e-Learning module entitled "Professional Phone Contact."

- This last point highlights the advantage of being able to incorporate user parameters as needs evolve. A custom solution that is flexible can respond consistently in terms of organization, while incorporating very different cultural contexts.





Corporate learning solutions: Incorporating diverse parameters

- Many multinational organizations are faced with the need to streamline infrastructure, but, at the same time, they want to continue to meet the needs that are specific to each location.

Getronics has put together a training catalog with 13 different languages in 25 countries for 2,000 users! Getronics attaches special importance to incorporating distinctive local features, and the language catalog reflects this adaptation to national contexts. We find British English, American English, and Castilian Spanish next to generalist languages such as French and Italian. The organization's multinational character, the constraints of time zones, and the need to create a common catalog accessible to all of the company's users quickly led Getronics to choose a solution that was virtually all-e-Learning .

- It has been shown that e-Learning solutions meet traditional learning needs but are adaptable to particular cultural contexts.
- Companies that use them can see that the technical options inherent in e-Learning solutions are an asset, but they are also unanimous in stressing the importance of organization and the methods and procedures to be implemented along with them.

Building on e-solutions, organization and tracking

- Optimizing resources and streamlining infrastructures are subjects discussed by top management, and many companies manage change management with tools and dedicated solutions. Like software applications, e-Learning solutions can improve quality and cost control. Still, like any new element in an infrastructure, implementation and operation can only happen with support measures.
- Through the interviews it conducted, IDC has identified some key points in the successful deployment of e-Learning solutions:

Combined programs: The importance of continuity

- Many companies continue to use a traditional solution together with an e-Learning solution. In this case, success depends on continuity between the two solutions used. Indeed, there is a direct interest in the instructor-led courses being directly relayed to practical application in e-Learning mode.
- It is clear that this continuity between the two methods is an important factor in effectiveness and, at those companies that are sensitive to it, it also reflects a growing awareness within the organization of the importance of introducing better operating conditions. In this way, management plays a significant role.

A key factor in success: Getting management involved

- One of the major advantages of e-Learning solutions – their freedom and adaptability to changing user contexts – is also one of the most often-criticized aspects. Many organizations that have, shall we say, jumped in headlong with e-Learning solutions have found that the acceptance rate stayed very low, with users quickly losing enthusiasm.



At **GlaxoSmithKline**, a single instructor leads both the face-to-face classes and the e-Learning sessions to maintain the link and thereby optimize each training session.



- In fact, behind these challenges, we usually see more or less the same causes:

» **A lack of awareness within management of the project's importance:**

Here, we are talking about the importance of making the link between the training infrastructure and its overall contribution to the company's business clear. At Konica Minolta, employees' increased skills have contributed to the company's streamlining efforts – an outcome that is especially well regarded.

» **A lack of internal resources dedicated to overseeing the curriculum:**

This is a corollary to the previous point. Lack of involvement often leads to the marginalization of projects due to a lack of visibility internally. On the contrary, when the entire organization is involved, the necessary structures naturally fall into place.

At Getronics, management has viewed the program as a worldwide company initiative from the beginning. Although registration is voluntary, each session is preceded by a meeting to promote the benefits of, and awareness about, using e-Learning solutions. At the same time, dedicated rooms are set aside for the programs' exclusive use.

- An e-Learning solution is deployed via the establishment of an organization in which prior information, as well as the availability of needed infrastructures, play a decisive role in its success. This success is mainly measured by progress achieved, and, therefore, it is important to be able to measure that progress.

Effective e-Learning solutions: measuring progress and ROI


- As part of the interviews conducted, IDC focused on the different methods used to measure students' progress. Two measures are mainly used by companies: the progress tests of the e-Learning solution used (Auralog) and the sanction of official certifications such as Bulats, TOEIC® and TOEFL®.

Measuring quality: Auralog's progress test

- Auralog's solution comes with two assessment tests with a scale of 1 to 10. Dynamically generated according to answers given, the test is adaptive, to individually evaluate the progress of each student. It consists of 64 questions that help with:
 - Measuring the student's knowledge of vocabulary, grammar, verbal and written comprehension skills
 - Evaluation at the start of the course to create uniform groups and provide training programs that are relevant to the student's level and needs
 - Tracking and measuring progress at the end of the cycle to quantify progress achieved.
- All companies are quite concerned with measurement, which is the only metric that can indicate whether the organization and methods are relevant, and, ultimately, the feedback is very positive. The test answers their needs because it is quick enough to perform and simple enough to compile and evaluate progress.
- Auralog carefully tracks the students' recorded results and is thereby able to objectively evaluate the progress they have made by undergoing language training with the TELL ME MORE® program. Measuring progress this way also provides a pragmatic response to the needs of companies that want to measure and quantify their employees' progress and include that parameter as a return-on-investment criterion.
- For this reason, Auralog has conducted a study on a representative sample of more than 400 students from 25 different companies in seven countries.



At Getronics, the quality of learning has advanced significantly, and the company is using the test systematically to evaluate enrollees' progress. Its relevance is recognized, because one of Getronics' goals is to include the Auralog progress test within the general evaluation framework of each employee.

- 
- Of this sample, the study shows **substantive progress in more than 85%** of students. This amounts **on average to 0.81**, on a scale of 1-10, **for 40 hours of working time**. Auralog also focused on studying and itemizing the parameters that play a role on the students' progress level.

- **The learner's starting level**

- For students who have earned fewer than five points on the starting level test, the beginner/intermediate level, progress was decisively measured in more than 88% of students. They progressed by 1.16 points on average.
- Lower levels will progress more quickly, unlike already-advanced levels, where training will be more to maintain knowledge and interact in real conditions with native speakers, as may be the case with virtual conversation classes.

- **Services and language support**

- Progress also depends on educational and language support provided to learners. Those followed by a Tutor or private teacher will make more progress than learners who are self-training. Similarly, learners who are tracked and coached intensively will make more progress than those who are supported by a more passive Tutoring service.
- Eighty-five percent of students who had language training with a tutor made decisive progress.

- **Training time**

This criterion is especially decisive, and the three training periods that are listed here show the direct relation that is established with progress achieved.

- Fewer than 20 hours**

- Only 64% of learners made progress amounting to 0.6 point.

- More than 30 hours**

- Of all the students who worked more than 30 hours, we see progress in more than 90% of them. That progress was evaluated at an average of 0.95 point.

- More than 50 hours**

- For more than 95% of users who worked more than 50 hours, Auralog's progress test found a rate of progress that averaged more than 1.1 points.

- The results are revealing: for a user population that started out at an average level, progress achieved is all the greater because the training is done in supported (tutored) mode and followed through in courses of between 30 and 50 hours on average.
- The other most often-used method is, of course, taking an official exam, which is often combined with Auralog's Progress Test.

Validating knowledge: Official certification

- Including TOEFL®, TOEIC® and Bulats, many certifications are now available, and the vast majority of companies, while they encourage their users to earn this sort of certification, provide no such confirmation at the end of the program. In fact, again, only a special business context could make one of these exams mandatory.
- In any event, the Auralog test has a recognized correspondence with the Common European Framework.
- Companies that are attentive to their students' progress show that they are concerned with productivity and efficiency in the infrastructure they have created. The previous examples show the contribution made by an e-Learning solution and, by the same token, they are also likely to generate a meaningful return on investment.

e-Learning and ROI: Combining quality and quantity

- The notion of ROI is traditionally hard to manipulate, because here it also implies more qualitative criteria. Learning quality, especially, can only be perceived by measuring the students' progress. We have already seen that the Auralog test is especially well-suited to measuring progress.



At **Konica Minolta**, as part of a 10-month curriculum, Auralog convinced its client that at least two hours of lessons per week would guarantee a minimum level of progress. The test confirms the validity of the measurement because, of the student population, those who followed through with the two-hour minimum per week advanced at least two levels in the test's progress scale.



At **GlaxoSmithKline**, the school uses the CEFR, which it pairs with the Auralog test. The Auralog test evaluates the students' level using a progress scale of six levels: A1, A2, B1, B2, C1, C2. The test is well-suited to measuring progress and confirms CEFR's results in about 70% of cases.





At **Alcatel-Lucent**, on a comparable basis – 54 training hours for an individual user – combination with the Auralog solution reduces costs by more than 30% compared to a 100% face-to-face solution. In groups of three or four users, the benefit was reduced to about 10%, but the flexibility of the e-Learning solution preserves an undeniable advantage.

- Therefore, the contribution of an e-Learning solution is very real, by the leveraging it represents as compared to a traditional solution. In terms of cost, it also has valuable potential.
- At the same time, its flexibility and adaptability are factors that directly influence the costs of use. In special contexts, important parameters such as savings are easy to quantify.

Getronics has precisely measured expenses for the learning solutions it used since 2004. Between 2004 and 2005, on traditional programs alone, the company spent about \$1.5 million. In the same six-month period, from June to December 2006, the use of a 100% e-Learning solution reduced costs by more than 70%.

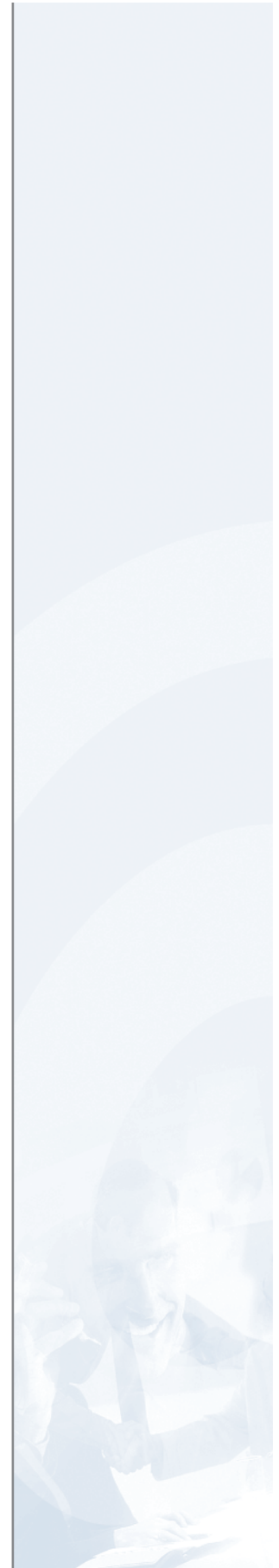
- Here, e-Learning is clearly an attractive solution. Indeed, if we consider use percentages, the solution's 80% took only 16% of the total training budget. Yet generally speaking, we fully understand the advantages brought about by establishing an e-Learning solution in a structured context.

Corporate learning solutions: Tools, methods and procedures

- The advantages of using e-Learning solutions are both qualitative and quantitative. Beyond simply measuring progress and profitability, this type of solution can be adapted to individual settings. The examples given throughout this document speak volumes about e-Learning's contribution to the quality of the learning achieved, in contexts that can be quite unusual.

The rules of good practices

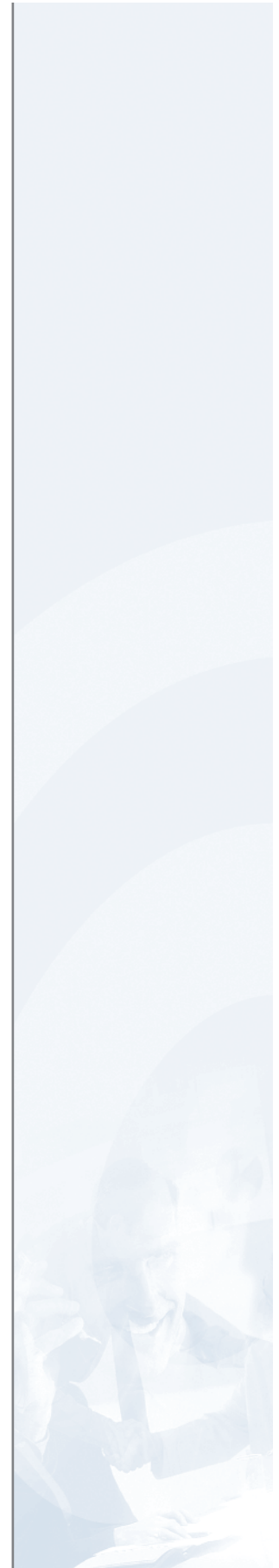
- Beyond special contexts and in the feedback cited, we also find that, whatever type of business it is, companies who have successfully implemented e-Learning solutions all have a number of things in common in terms of methods, procedures and organization.
- In that regard, we may speak of rules of good practices, of which the principles are listed below.
 - » **Remote user parameters are incorporated:** Mobility has become a part of doing business in most industries. Here, the limits of the traditional learning model are tested, and forward-thinking companies have understood the benefit to be had from remote learning solutions, where the physical presence of user and tutor are no longer required. Contrary to a purely face-to-face solution, e-Learning is no longer an isolated exercise, but has become the vector of a comprehensive learning solution, making it possible to deploy a single program company-wide.
 - » **Tutored e-Learning is used as a way to optimize traditional training:** Face-to-face programs provide interesting interaction, which is a factor in the rapid acquisition of a knowledge base. Yet experience shows that the effects are lost rather quickly over time, if there is not a move fairly soon to practical application. e-Learning solutions are a good way to optimize training programs, and companies who combine the two modes quickly see the knowledge transfer lead to retention. Tutoring is a major component of effectiveness, because, where companies record the best progress rates, tutoring is common to both types of solution.



- **Content is aimed at interactivity.** An e-Learning solution is a flexible educational infrastructure that adapts well to specific contexts. The companies that get the most from them understand the benefit of enriching the educational framework with specific content. This allows users to more directly appreciate the interest of the programs within their sphere of activity, which is also an important motivating factor.
 - **Business contexts are included in the curriculum:** Many learning programs are structured around a predefined curriculum that is hard to break out of. Companies who are in competitive, cost-controlled settings understand it's important that the learning curriculum correspond as closely as possible to their business realities. There is a real wealth of internal productivity attached to the increase of employees following the curriculum.
 - **Management is invested:** In all businesses in which e-Learning solutions have demonstrated their usefulness, there is one constant: management is involved very early on. Awareness-building meetings are held prior to the handover of dedicated specific premises. Everything is set up to give the programs optimal conditions for effectiveness.
 - **Learning quality is measured:** This is probably one of the most important points, because it involves the companies' desire to measure contribution to overall performance, and means that organizational efficiency and solution effectiveness can be sanctioned – in the positive sense. The internal structures responsible for the learning programs want to be able to demonstrate the viability and profitability of the solutions used, with numbers to back them up. So they systematically adopt progress tests that will formalize progress achieved.
- More generally, this last point is the organization's "justice of the peace" in a manner of speaking. It makes it possible to observe the following: **To the extent that companies implemented these rules of good practice, the progress tests used demonstrate the quality of e-Learning solutions – and their effectiveness as part of a company learning program.**

Conclusion: e-Learning solutions and streamlined infrastructures

- Flexibility, incorporating remote parameters, and the ability to accommodate specific business contexts: are some of many advantages that show the benefits of using e-Learning solutions.
- It is especially apparent that e-Learning solutions are appropriate for multicultural and multi-site environments.
- From the company's point of view, they are particularly well-suited to diverse parameters, and also to accommodating specific business environments.
- From the user's point of view, progress measurements via testing demonstrate the relevance of the learning methods and procedures used, highlighting the importance of following the rules of good procedures.
- With these conditions met, a company that decides to use an e-Learning solution can record significant progress among its very diverse user populations.
- Thus, many organizations may commit to a resource-optimization process where the observed returns on investment are not made at the expense of performance quality – quite the opposite.
- **For these reasons, e-Learning solutions are a factor to be considered in any movement toward streamlining training infrastructures.**





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