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Plus ...

Jobs Discussion Tips Reviews Events



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Editorial



Seasoned compliance expert Jeff Jinnett, described in the feature article in this issue of FreePint, witnessed something akin to a miracle in this industry. During a training session, he saw people from a compliance department embrace -- yes, actually make physical contact with people from an IT department. These are people who never mixed before they were required to comply with new government regulations.

Even though we're people who earn a living working with information, either finding, using, managing or sharing it, we don't always communicate with each other. It sometimes takes a challenge as great as moving a company towards government compliance to bridge such a great divide.

In future issues, we'll try a bit of IT-IS relationship counselling, but for now our general manager Robin Neidorf explores what happens when compliance brings two departments together.

These days, departments are almost as likely to be separated. The promise of low costs and high productivity is driving many companies to outsource their knowledge processes elsewhere. It's not a practice for everyone, nor is it one to be taken lightly. R. Sivdas presents a primer on how to explore the world of outsourcing.

Also in this issue, we asked Adrian Janes what he thought of a book that helps librarians cope with a quickly morphing worksphere. He tells us in his review of "The Librarian's Internet Survival Guide".

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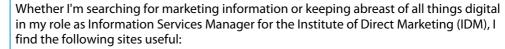
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My Favourite Tipples

by Penny Crossland



Marketers' Portal < http://www.marketersportal.com/>, an online resource for marketers by Zenith Optimedia. It contains links to corporate and brand sites by category, as well as links to media and media research.

Marketing Handbook http://www.marketinghandbook.co.uk/ is a guide to sales and

- marketing services in the UK. It includes lists of -- and links to -- companies involved in sales promotion, creative services and exhibitions and conferences. Also has links to marketing associations and sources.
- Netlingo < http://www.netlingo.com/> is a comprehensive dictionary of Internet terms, including the top 20 Internet acronyms and technological terms that are now common expressions. There is also an email newsletter of Internet terms.
- Internet World Stats < http://www.internetworldstats.com/ contains up-to-date and free Internet user statistics and rankings for over 230 countries and world regions. It includes data on broadband penetration, world population data and global trade information.
- Classictic < http://www.classictic.com/> sells e-tickets for classical concerts and operas in all major European cities. Performances are searchable by date and include profiles of orchestras and/or performers.



Penny Crossland started her business research consultancy in 2001 http://www.chbusin essresearch.co.uk/> and for the last two years has also been working for the Institute of Direct Marketing http://www.theidm. com/>, assisting in the provision of direct marketing data and analysis to its members and in the development of a marketing Information database. Submit your top five Favourite Tipples. See the guidelines at http://www.freepint .com/author/>..

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FreePint Bar

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Monique Cuvelier serves as editor of the FreePint Newsletter. She has contributed many articles to dozens of publications in the UK and US, CFO, CIO Insight, eCommerce Business, and also written about business and technology for The Western Mail, Wales' national newspaper. She has launched and run several online and print publications. She can be reached at <monique.cuvelier @freepint.com>.

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- If the internet makes sharing and working with documents so easy, then why on earth are we still using hardcopy? Katrina Hughes, a librarian presenting a paper on the topic at Information Online 2007 in Sydney, Australia, would like your input. Lend it here

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 Homer Simpson named his internet company Compuglobalhypermeganet, in an obvious ribbing to web lingo. Funny, but not so unusual. One FreePinter is looking for a dictionary that includes new compound words. Chime in if you've ever seen one

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"Outsourcing Research Information: An Introduction"

By By R. Sivadas



R. Sivadas, director and CEO of Scope e-Knowledge Center Pyt Ltd., has over 23 years experience in business, industry and offshoring research and information. Scope e-Knowledge Center is a leading information and research organisation offering world-class database, business and investment research and analysis services to clients in the US, the UK and continental Europe. Headquartered in Chennai, India, the company's marketing/business associates span New York, London, Palo Alto, Cologne and Brussels. Scope is the winner of numerous awards including the KM 100 list for 2006, Service Provider of the Year Award in 2005 by the **Data Publishers** Association (DPA) UK..

The global information industry has been a witness to phenomenal changes in recent times. Recent industry estimates peg the global information industry at about \$358 billion (GBP 188 billion) in 2005 and forecast the market to grow to over \$458 billion (GBP 240 billion) in 2009. Of this, the research information space, including market, company and financial information, is forecasted to grow to about \$74 billion (GBP 40 billion). Growth in the global information market is primarily driven by technological advancements, increasing digitisation, growth in emerging markets, globalisation and increasing trends towards intellectual property protection. Regulatory compulsions, such as the Wall Street settlement, in which 10 major firms paid \$1.4 billion to settle claims of egregious conflicts of interest, are also influencing the overall research market.

The emergence of the KPO/RPO industry

A more recent trend, albeit similar to that in the overall IT and Business Process Outsourcing (BPO) industry, is the emergence of off- shoring high-valueadded processes, namely business and financial research support services and intellectual property-related support services. This represents a new emerging area: Knowledge Process Outsourcing (KPO). According to a NASSCOM-McKinsey report from 2002, the total outsourcing opportunity of non-IT activities is an estimated \$141 billion (GBP 74 billion) by 2008. Of this, the report values the research and allied services opportunity at about \$18 billion (GBP 9.4 billion). However, we at Scope eKnowledge Center estimate that only about 45 per cent to 50 per cent actually will be outsourced during this period. Market research, competitive intelligence and data search, and integration will be the fastest-growing segments of all the various research activities.

Research Process Outsourcing (RPO) is a part of the overall KPO industry. In the recent few years, this market has witnessed tremendous transformation. From the administration of telephonic surveys and questionnaires using call centres in the early years of the 21st century, the industry has progressively moved to handling information search and compilation activities on various business, technology and economic aspects. At present, highend tasks such as competitive intelligence, preparation of company profiles, and financial analysis and modelling, are being handled by companies in India.

In line with this evolution, the RPO market has also seen the emergence of a diverse range of players across a wide range of services. The financial research area for instance is dominated by captives set by large global players such as Goldman Sachs, Lehman Brothers and JP Morgan. In case of other areas, such as business research, data analytics, legal and IP services, there is a mix of captive and third-party providers such as Scope eKnowledge Center and Office Tiger.

Predominant growth drivers for the RPO industry

Given below are the prominent growth drivers for the RPO industry:

- Technology and content related.
 - Decline in telecom/information processing costs
 - Proliferation in information content
 - Increased time spent by executives on searching for information rather than actual value-added analysis
- Economic and market related.
- Pressure on the cost front
- Rapid globalisation
- Rapid consolidation
- Regulatory Pressure with regard to Wall Street



- Organisational related.
 - Need to focus on core competencies
 - Optimal use of resources
- Supplement internal expertise/broaden range of offerings.

Key benefits of RPO

Some of the major benefits of RPO include:

- Cost savings (about 30 per cent to 40 per cent, depending on the research deliverable being outsourced)
- Access to a large talented workforce
- Improved scale of operations (a typical investment banking analyst can increase the coverage of stocks several fold)
- Free up critical resources to focus on core competencies
- Leverage specialised knowledge and expertise
- Enhance innovation and productivity levels creating stronger intellectual property (this smoothes out fluctuations in resource demand and reduces time to market)
- 24x7 operations.

Prominent RPO models

There are three basic RPO models, based on value created and the complexity of the task involved. These are elaborated below:

Transactional model. This model is usually at the start of the RPO relationship. Projects are typically low in terms of the value created and in complexity. Such engagements are based on specific transactions and showcase the vendor's expertise and execution capabilities. The client benefits from value that is created through good project execution.

Relationship model. Once the RPO engagment begins to stabilise, the preferred model is one of relationship. Here, the contracts begin to get bigger and last longer. The vendor begins to showcase more of research process expertise and value is created through process enhancements

Partnership model. This model is the preferred long-term model. It involves the joint development of business propositions and embedded systems and allows the client to experience greater value through efficient business process management.

Off-shoring: the lessons learnt

Based on our prior experience in working with global clients in the research space, some of the key points to bear in mind include:

- Benefits are linked to scale of the project: the bigger the project, the better the benefits
- Outsourcing involves time and effort from your side too, especially in the initial stages
- Be wary of outsourcing processes that you are not familiar with or that are not working internally
- Always carry out a pilot project first and start with low-risk projects
- Have realistic savings estimates: 70 per cent is not possible; 30 per cent to 40 per cent is possible
- Productivity gains will stem from a learning curve, albeit with time
- Be clear on the final deliverable, including its structure and nature
- Define quality parameters and delivery schedules



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- Look at the offshore company as a longterm partner not a vendor
- Finally, communicate, communicate, communicate!

Challenges and limitations in RPO assignments

Despite adopting various processes, integrating diverse IT platforms and putting in the best teams, there are certain challenges and limitations to keep in mind. These include:

- Ambiguity will not work. Research projects that are outsourced should be very specific. Too much ambiguity will reduce the potential benefits with too many iterations and communication delays.
- Know consumer, brand and regional nuances. Don't expect the offshore partner's team to have specific knowledge and expertise on specifics and nuances of consumers, brands, the locale and region. The team can only supplement your expertise; it can't replace local knowledge.
- Avoid complex, consumer marketresearch studies. It is unlikely that outsourcing complex, consumer marketresearch studies will be successful despite the boom in the global call-centre industry. In contrast, business-research services based on secondary research such as the internet are highly amenable for outsourcing.

- Don't expect; advise. You still have to think. Outsourcing will not result in the delivery of customised, well-defined recommendations akin to a consultant. Instead be prepared only for facts and analysis upon which you will still need to make your decisions.
- Outsourcing is a choppy ride in the initial phase. At least during the initial phase of the outsourcing assignment, the progress is likely to be slow and erratic. Don't expect a smooth and immediate transfer of all capabilities and processes.
- If it doesn't work for you, it's unlikely to work for your outsource partner. Avoid offshoring research activities that have been failures at your end. This is because you will be providing the same set of guidelines that were used to execute the project at your end. Consequently, the offshore vendor too is likely to repeat the same mistakes resulting in the failure of the offshoring process. In the end both parties are likely to be disillusioned by the entire engagement.

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""The Librarian's Internet Survival Guide: Strategies for the High-tech Reference Desk, 2nd Edition""

Written by Irene E. McDermott Reviewed by Adrian Janes



Having begun his career in academic libraries, Adrian Janes is currently an Information Services librarian with the London Borough of Havering. Among his influences are Danny Sullivan, Jorge Luis Borges and the Marx Brothers.

As the title of "The Librarian's Internet Survival Guide: Strategies for the High-tech Reference Desk" suggests, this book is primarily aimed at those who unashamedly still call themselves librarians. It is not an ultra-technical treatise, but a practical work for those trying to serve a demanding public. Thus the emphasis is on information sources tested by author Irene McDermott's own experience as a reference librarian. The book has several chapters on the technical side, but these are jargon-free and similarly rooted in working needs.

Originally published in 2002, this updated volume seamlessly integrates discussion of developments such as weblogs and RSS. Given the book's comprehensiveness, it is perhaps significant that McDermott neither cites Wikipedia as a source nor discusses wikis generally. Nonetheless, she covers an enormous amount of ground.

The chapters on ready reference range through the general (search engines, directories, full-text and subject portals) to specific areas such as children, health and personal finance. McDermott's website descriptions are succinct, usually managing to suggest both their strengths and potential drawbacks. Whilst imparting much solid information, her style is conversational and spiced with humour.

Unlike much writing about computers, her chapter on computer troubleshooting is, refreshingly, almost as useful for the Mac as for the PC. Equally lucid chapters cover web-based email, disabled internet access and making webpages.

The chapter on medical information is a highlight of the book that displays all of its virtues. From a moving description of a close friend's cancer diagnosis, it becomes an inspiring tale of how she was able to assist him through her use of the web. In doing this, it incorporates descriptions of

helpful websites and a brief discussion of how to evaluate reliability (elaborated upon in a chapter on teaching the internet). This blend of the practical with the personal keeps the book readable and useful.

Does the book have any downsides? Like the internet itself, it is tilted towards the American reader, and certain websites clearly have little relevance beyond the U.S. However, the majority McDermott recommends will be of interest to information professionals internationally and in various sectors. Moreover, she has been careful to note a sprinkling from elsewhere, e.g., British sites like BUBL, Resource Discovery Network (now Intute) and, yes, FreePint. Websites from Canada, Australia, the Netherlands and Germany are also highlighted.

Sometimes her enthusiasm for the internet teeters on the exaggerated. For example, the chapter on news sites doesn't really indicate the limitations of news archives, at least in terms of free content. However she does raise the important issue of bias, through a group of sites that assist with 'news evaluation'. Similarly, having introduced somewhat uncritically an array of sites on finance and investment, she balances this with a cautionary selection entitled Fraud Watch.

The best compliment I can pay this book is my desire to go straight back through it and check out a whole list of sites that sound useful. The examples I have looked at certainly suggest that McDermott is a reliable guide through the internet jungle.





Related FreePint links:

- "The Librarian's Internet Survival Guide: Strategies for the High-tech Reference Desk, 2nd Edition" ISBN 1573872350, published by Information Today Inc.
- "The Library and Information Professional's Internet Companion" Written by Alan Poulter, Debra Hion and David McMenemy Reviewed by Adrian Janes http://www.freepint.com/issues/190106.htm/#bookshelf
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"IT Compliance Conference: Interesting Landscape on the Other Side of the Information Fence"

By Robin Neidorf



Robin Neidorf, Free Pint Limited's general manager, attended the

Compliance Conference, held 2-4 October in Washington, D.C., sponsored by The IT Compliance Institute (ITCi). The conference was designed to help IS and IT people learn how to design, align and control compliance efforts. You can ask Robin her thoughts on compliance and how IT and IS

together better at Online Information 2006 in London http://www.online-information.co.uk/> 28-30 November, 2006.

departments can work

Speaker Jeff Jinnett stood in front of a full auditorium, engaged in lively dialogue with participants eager to learn more about compliance. Their company was in the midst of a critical initiative to align IT resources with regulatory compliance needs, and Jinnett was delivering a key training session for the entire team responsible for envisioning, implementing and then evaluating the work.

At the end of the session, something remarkable happened. As attendees gathered up their belongings to leave the room, '... the whole left side of the room went over to shake hands with the whole right side of the room,' Jinnett recalled. 'I asked someone what was going on. They said that the IT folks were sitting on the left and the compliance team on the right. And they'd never met each other before'.

When he told this story during his session on records management at the IT Compliance Conference, held 2-4 October in Washington, D.C., it got a knowing laugh -- and a few 'I can top that' contributions. Jinnett, who describes himself as a 'lawyertechnologist' and is currently the managing director of the compliance practice for Swingtide, Inc.

< http://www.swingtide.com/>, a technology consultancy, was part of a stellar line-up of faculty with different perspectives on the tricky connection between information resources and regulatory compliance.

The moral of Jinnett's story was one echoed and elaborated on by nearly every speaker that day: Organisations must learn to have an integrated view of how they manage information, taking into account regulatory compliance but also decision-making in every department. In hearing the speakers, listening to questions and comments from the delegates, and talking with individuals between sessions, it was clear that most organisations still take a reactive, project-oriented approach to managing, sharing and using their information resources.

Yet this approach puts them at risk for regulatory missteps and public relations nightmares.

FreePint attended the second day of the IT Compliance Conference and gained new insight on the challenges facing information professionals of all stripes and loyalties -- those in the corporate library as well as those in the data warehouse. We identified the event through our research into the information requirements of regulatory compliance, which was an editorial theme across our publications in August 2006. In the August issue of VIP < http://web.vivavip.com/go/vip/33>, editor Pam Foster took a close look at the information products that companies can use to maintain compliance with financial regulations. ResourceShelf's senior editor Shirl Kennedy published a Resource of the Week < http://digbig.com/4mgsb> focusing on websites that provide guidance on various laws and regulations, from Sarbanes-Oxley to health and environmental regulations.

The conference was the second of its kind offered by the IT Compliance Institute < http://www.itcinstitute.com/, an organisation focused on the technology requirements of compliance on a global basis. Other IT Compliance Institute offerings include an e-newsletter, online resources and articles, a regulations database (available only to members) and other tools to align technology with legal and regulatory requirements.

Strategy, then tactics

Throughout the sessions, presenters exhorted participants to take a strategic-level view of regulations and compliance, and devise information policies to support strategy. Doing so requires companies to stop combing through every punctuation mark of new laws to determine minimum compliance and invest in long-term planning and solutions.



Related FreePint links:

- Information auditing: a guide for information managers
 http://www.free pint.com/shop/re port/infoaudit/>
- "Making IT Governance Work in a Sarbanes-Oxley World" Reviewed by Eldin Rammell
 http://www.free
 pint.com/issues/2
 40806.htm#books
 helf>
- Dotting the i in 'compliance': what you need to know (and do) to protect your organisation http://web.vivaVi p.com/go/vip/33
- IT Compliance Conference <<u>http://www.itcin</u> <u>stitute.com/confe</u> rence/>

Kerry Anderson, the vice president of IT risk at Fidelity Investments Brokerage Company, used the example of privacy legislation enacted in the state of California, requiring companies to notify consumers when certain kinds of security breaches have occurred.

'The point is not to build a system to deal with California law, though that's going to be part of the solution', she explained. 'The point is to identify the underlying trend towards greater protection of consumer privacy. Today it's California, but tomorrow it will be everywhere. You can do an expensive, one-time project to address the California law, or you can identify the underlying trend and devise a strategy that plans for the future. It takes more effort, but in the long run it's less expensive and more effective'

Information control and information flow

On the broad stage of compliance, information plays many roles. In some cases, such as due diligence and Know-Your-Customer requirements, organisations must document that they have sourced and reviewed information; they have to demonstrate that the right information for sound decision-making flows to the desktops of the right individuals. Yet in other cases, such as consumer privacy, organisations must document their information restrictions — the security of their data stores, access requirements and validation protocols.

Here is where the greatest differences between a library or content orientation and an information technology orientation seem to lie: One emphasises information flow, while the other emphasises information restriction. No wonder IT and IS departments can have such difficulty working together!

But presenters like Keith Enright, the director of customer information management for Limited Brands, Inc. (owner of such consumer brands as Victoria's Secret, The Limited, Express and others), demonstrated that the two orientations can indeed work together harmoniously under certain circumstances. The requirements for happy marriage? An organisation must have very clear strategic objectives for its information policies; ownership of information strategy must be sufficiently high in the organisation (preferably at the C-level) to create topdown guidance; and departmental activities must be fully aligned with the overall strategy.

Enright's presentation dove deeply into the complexities of US consumer privacy laws and their requirements for both data preservation and data destruction. But he kept an important information-sharing perspective as a running theme through his remarks: enabling different divisions to share customer information offers an opportunity to maximise the use of data assets, as long as such sharing takes place within the legal framework.

Breaking down silos

A large number of workshop participants came from beleaguered IT departments, where they are expected to work miracles with legacy systems and little budget. In Q&A sessions, they complained of being misunderstood by management and asked to 'fix' the compliance problem with little guidance on how to do so in alignment with overall business strategy. Faculty lent a sympathetic ear and reiterated that compliance is not something to be handled at a departmental level, but rather requires an integrated approach, touching all workers and culminating with support from highest-level executives.



But that requires learning to work together, to speak a common language. Relations between IT and other kinds of information practitioners are sometimes turbulent, and yet the kinds of challenges described by the IT professionals at the conference resonated with common complaints of the library and content professionals: Shrinking budget and intensifying pressure to control costs. Perception of being a cost centre rather than a business driver. Lack of buy-in at the senior level. Organisational befuddlement over the complexities of projects that 'lay people' think should be guite easy. A strategy most notable by its absence.

In other words, there's a lot of common ground here for information professionals on both sides to leverage in pushing their organisations forward, providing value and championing the cause of best practices in information management and usage.

One of the final speakers of the conference, Lee Dittmar of Deloitte Consulting LLP, returned to the theme of strategy before tactics. Dittmar advocated an Enterprise Risk Management (ERM) approach to compliance.

'You have to establish at the top level an enterprise-wide approach to risk, covering governance, compliance, financial risk and so on', he said. 'Dealing with them in silos is what creates problems'.

Furthermore, Dittmar continued, the increased attention paid to compliance represents an important opportunity for IT and IS alike: 'The risks are so high and so public that senior executives are taking them very seriously. You've got their attention right now'.



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Coming this Autumn: Reviews of Skyminder, EBSCO products, FactSet, Capital IQ, and our Industry Overview issue in November.

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So while the challenges of compliance are unlikely to ease up any time soon -- there is no such thing as being 'done' with Sarbanes-Oxley or Basel II -- managers might as well look at this challenge as an opportunity. Take this ongoing business process that requires information to both flow and stay secure and use it as a way to bring together departments that before never mixed. Companies may even find that employees who never even nodded a hello to each other will now cross the room to shake hands.



Events

Australia and Territories:

- "Learning Technologies Conference" 9 10
 November http://www.freepint.com/go/e746
- "Business Intelligence Sustaining a competitive edge through effective data analysis" 22 - 23 November http://www.freepint.com/go/e740
- "Demonstrating the value of knowledge management" 22 - 24 November
 http://www.freepint.com/qo/e771

Germany:

"3rd Annual German Cl Conference" 15 - 16
 November < http://www.freepint.com/go/e709>

United Kingdom:

- "Blogging for Business" 25 October http://www.freepint.com/go/e768
- "Project Management" 26 October http://www.freepint.com/go/e670
- "Re-energising Information Services: Strategies for Success"
 - 26 October http://www.freepint.com/go/e751
- "JISC RSC South East ILT Fair" 27 October
 http://www.freepint.com/qo/e737>
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- "Assessing the quality of information" 31 October
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- "Introduction to Chemical Information" 1 November
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- "Online Information" 28 30 November http://www.freepint.com/go/e749

Gold

A look back at what FreePint covered at this time in previous years:

- FreePint No.193 27th October 2005. "Shifting Platforms - CD to online publishing" and "Measuring Public Relations"
- <http://www.freepint.com/issues/271005.htm>
- FreePint No.170 28th October 2004. "European Industrial Relations Sources" and "How European companies can turn the challenge of environmental regulation into profit"
 - <http://www.freepint.com/issues/281004.htm>
- FreePint No.147 16th October 2003. "Insurance: a review of websites" and "Out of sight but not out of mind: virtual meetings"
- http://www.freepint.com/issues/161003.htm
- FreePint No.123, 17th October 2002. "Is your site slow, medium or fast, and does it really matter? Essential Sources for Web Performance Analysis and Improvement" and "Taking the Plunge into the Entrepreneurial World of the Independent Information Professional"
 - http://www.freepint.com/issues/171002.htm
- FreePint No.98, 18th October 2001. "WAP Sites and the Mobile Internet" and "Working in Information in the UK Voluntary Sector"
 - http://www.freepint.com/issues/181001.htm
- FreePint No.73, 19th October 2000. "Geology On The Web" and "European Document Delivery Suppliers and Resources On The World Wide Web"
 http://www.freepint.com/issues/191000.htm
- FreePint No.48, 21st October 1999. "Notes on the Net: A trawl around the Music Sites" and "Unblocking the Web: digital technology and the telephone line"
 - http://www.freepint.com/issues/211099.htm
- FreePint No.24, 15th October 1998. "How to select and optimise your PC Internet modem" and "A guide to Consumer Health Information on the 'Net"
- <http://www.freepint.com/issues/151098.htm>



Contact

Web:www.freepint.comEmail:support@freepint.comSubscriptions:support@freepint.com

Authors: http://www.onopoly.com/author/

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ISSN: 1460-7239

Free Pint Limited

4-6 Station Approach Ashford, Middlesex

TW15 2QN, United Kingdom Tel (UK): 0870 141 7474 Tel (Int): +44 870 141 7474

Technology by Willco http://www.willco.com/>

Contributors to this issue

Monique Cuvelier (Editor, FreePint), Janet Moore, Ulla de Stricker, Barbie Keise, Mike Jones, Pam Foster (Editor, VIP), Robin Neidorf (General Manager, FreePint), William Hann (Managing Editor, FreePint), Penny Hann (Production Editor, FreePint), Plain Text < http://www.plain-text.co.uk/ (proofreading).

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