

WINTERGREEN RESEARCH, INC.

**Language Translation Software and Services Market
Shares, Strategies, and Forecasts, Worldwide, 2009 to 2015**

**Language Translation Provides Localization for Global
Integrated Enterprise**



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

**WinterGreen Research, Inc.
Lexington, Massachusetts**

www.wintergreenresearch.com

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CHECK OUT THESE KEY TOPICS

LOCALIZATION TRANSLATION
TRANSLATION SOFTWARE MARKET SHARES
Translation Software Market Forecasts
Global Language Translation Software
Translation Software Solutions

Language Translation for Telepresence
Value Of Natural Language Translation
Difficulty Of Measuring Automatic Language Translation Systems
CORPUS-BASED TRANSLATION
CORPORA TRANSLATION
LINGUISTIC REPRESENTATION
WORD MAGIC TECHNOLOGY
MACHINE TRANSLATION TECHNOLOGY
SPOKEN TRANSLATION TECHNOLOGY
SYSTRAN INTUITIVE CODING TECHNOLOGY
STANDARD MACHINE VS. CUSTOMIZED TRANSLATION SERVICES
THE NATIONAL COUNCIL DEPENDS ON INTERPRETING IN HEALTH CARE
INTERNATIONAL EVENTS AND MULTINATIONAL COMPANIES REQUIRING
SIMULTANEOUS TRANSLATION

OPPORTUNITY ABOUNDS

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Language Translation Software and Services Market Shares, Strategy, and Forecasts, Worldwide, 2009-2015

LEXINGTON, Massachusetts (October 11, 2009) – WinterGreen Research announces that it has a new study on language translation software and services. The 2009 study has 668 pages, 244 tables and figures. Worldwide markets are poised to achieve significant growth as the globally integrated enterprise uses language translation to build out localized e-commerce sites that support a brand in every region.

According to Susan Eustis, the lead author of the study, “the globally integrated enterprise is the market driving force in language translation markets. The ability to define functions within a company that can be consolidated to achieve efficiency define a strategy that improve operations. Language translation is one of those defining enterprise functions that can be consolidated. The integration of functions across national boundaries supports delivery worldwide.” The national boundaries do not define corporate practice, rather for the integrated enterprise, silos of functions are consolidated worldwide.

The multinational enterprise model creates an enterprise that is able to be responsive to local customer requirements and cultivate local talent. The globally integrated enterprise is able to reduce administrative redundancy because each country had its own back-office functions. Supply, procurement, finance and human resources are other functions similar to language translation that can be consolidated across national boundaries.

The globally integrated enterprise can locate functions anywhere in the world, wherever the functions are more efficiently delivered. The cost, skills, and environment of translation and supply chain can be consolidated because everything is connected. Work is moved to the place where it is done best. The national barriers that used to block the flow of work, capital and ideas are being replaced by automated process that is centralized in one administrative unit for the entire enterprise.

Global enterprise integration is driven by economics, expertise and openness. Translations are often scattered throughout the different national locations. Translations are often performed by a range of different outsourcers. The globally integrated enterprise is able to consolidate the translation function in one administrative department.

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The use of language translation for telepresence is another driving force for language translation. Machine language translation is getting a large lift from the increased use of telepresence to run the globally integrated enterprise. Telepresence is next generation high definition TV videoconferencing. Telepresence leverages high definition video and high definition audio to support collaboration across distance. People located remotely can communicate effectively because of the compelling experience provided by HD TV.

As people try to meet remotely using telepresence, the use of language translation becomes a more compelling aspect of the communication. Telepresence allows people from different countries to work together on a single team. The bigger screens, the audio clarity, the visual clarity are compelling. The ability to work together is facilitated by the ability to provide a more lifelike communication experience. Collaboration is facilitated by enabling sharing of documents and power point presentations as if people were in the same room. When people speak different languages, language translation becomes a central part of the experience.

The Lionbridge platform is now the world's largest, web-architected language platform with more than 52,000 individual client translation memories and 14,000 individual translators serving more than 700 clients. The company continues to improve the grid architecture of this platform to enable more than 2,000 concurrent users and 99.9% uptime. The company is scaling Freeway™, Lionbridge's free, web-based translation management platform.

Language translation software is positioned as globalization software solutions. Localization relates to the adaptation of products or services to the cultural, legal, linguistic, and technical requirements of a specific locale.

Exchanged of data between systems is automated using Web Services. Use of Web Services simplifies the translation process and reduces turnaround times by enabling translation-ready content that is ready to be detected, gathered for submission, posted, tracked, and pulled back automatically.

Some words have different meanings and syntactic behavior, depending on the semantic context in which they are used. Even with specialized dictionaries the quality of the translation cannot always be satisfactory because of the total freedom and productivity of content on the web; the dictionaries selected cannot be the exact domain glossary due to extreme diversity; and the impossible task of having a complete description of all possible domains (a problem not only of cost, but of expertise).

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Language is able to communicate nuance. The deciphering of nuance has been difficult to achieving using automated process. No generic MT system can solve sophisticated translation problems. The key to having a good translation is to have a good writer. The writer is an educated person able to create sentences that make sense and paragraphs that flow. This is central to the translation market. Much of the process can be automated, but there are still large segments where the human translator adds value.

Worldwide language translation services software license shipments market share analysis indicates that LionBridge has 16% share of a \$2 billion language translation services market. LionBridge and SDL are market leaders with IBM participating in the services portion of the market supported by its WebSphere product that offers portal technology..

Localization translation services based on software at \$2 billion in 2009 are forecast to become \$7 billion markets by the end of the forecast period. Software is becoming much more accurate as it combines the separate rules engine, translation memory, and statistical technique algorithms that have been used separately hitherto to support translation services. The combination of technologies is anticipated to create systems that are more accurate. These markets are part of a \$10 billion larger translation market, forecast to reach \$21 billion by 2015.

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Companies Profiled

Market Leaders

LionBridge
SDL / Trados / Idiom
IBM
RWS Legal Translation
Sail Labs Technology

Market Participants

1-800-Translate	Acclaro
All Language Ltd	Alpha CRC
Applied Language Solutions	AVW Audio Visual
Applications Technology (AppTek)	Asia Online
Berlitz	Beyondsoft
Blast Radius	Captura Group
Babylon	Comsys
Benesse Corporation / Berlitz	Ciyasoft
Echo International	EQHO Communiactions
ForeignExchange Translations	Geo Group
Global Vibration / MSEO	Government Acquisitions
Google	
HiSoft Technology	
INK	Innodata
Innodata Isogen	
iSP	Language Engineering Company (LEC)
Language Lens	
Language Weaver	
Legal Translation Services (LTS)	
LTS	Lionbridge
Localize Technologies	LinguaLinx Solutions
Lucy Software	
LUZ	Matrix
Microsoft Corporation	Moses
Milengo	MultiCorpora
New Market Translations	Nstein Technologies

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OmniLigua	One Planet
Opticentre	Quagnito
Prompt	RWS Legal Translation
Rubric	Sail Labs Technology
Sakhr	
SDL / Trados / Idiom	
Simultaneous Interpretation Specialists / I.S.T.S	
Spoken Translation	Systran
SynerGlobal	TestQuest
The Bid Word	Translation Experts
TransFluenci	
VistaTEC	Wessex Translations
WhP	Word magic Software
Wunderman and WPP Group / Blast Radius	
Yahoo!	
1-800-Translate	

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Language Translation Strategies and Forecasts, 2009-2015

REPORT METHODOLOGY

THIS IS THE 416 TH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPANT IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS IS A CENTRAL PART OF THE STUDY. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

FINDINGS AND CONCLUSIONS OF THIS REPORT ARE BASED ON INFORMATION GATHERED FROM INDUSTRY SOURCES, INCLUDING MANUFACTURERS, DISTRIBUTORS, PARTNERS, OPINION LEADERS, AND USERS. INTERVIEW DATA WAS COMBINED WITH INFORMATION GATHERED THROUGH AN EXTENSIVE REVIEW OF INTERNET AND PRINTED SOURCES SUCH AS TRADE PUBLICATIONS, TRADE ASSOCIATIONS, COMPANY LITERATURE, AND ONLINE DATABASES. THE PROJECTIONS CONTAINED IN THIS REPORT ARE CHECKED FROM TOP DOWN AND BOTTOM UP ANALYSIS TO BE SURE THERE IS CONGRUENCE FROM THAT PERSPECTIVE.

THE BASE YEAR FOR ANALYSIS AND PROJECTION IS 2008. WITH 2008 AND SEVERAL YEARS PRIOR TO THAT AS A BASELINE, MARKET PROJECTIONS WERE DEVELOPED FOR 2009 THROUGH 2015. THESE PROJECTIONS ARE BASED ON A COMBINATION OF A CONSENSUS AMONG THE PRIMARY CONTACTS COMBINED WITH UNDERSTANDING OF THE KEY MARKET DRIVERS AND THEIR IMPACT FROM A HISTORICAL AND ANALYTICAL PERSPECTIVE. THE ANALYTICAL METHODOLOGIES USED TO GENERATE THE MARKET ESTIMATES ARE BASED ON PENETRATION ANALYSES, SIMILAR MARKET ANALYSES, AND DELTA CALCULATIONS TO SUPPLEMENT INDEPENDENT AND DEPENDENT VARIABLE ANALYSIS. ALL ANALYSES ARE DISPLAYING SELECTED DESCRIPTIONS OF PRODUCTS AND SERVICES.

YOU MUST HAVE THIS STUDY

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Language Translation Market Shares, Strategies, and Forecasts, 2009 to 2015

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