

WinterGreen Research, INC.

**Language Translation Market Shares, Strategies, and Forecasts,
Worldwide, 2011 to 2017**

Language Translation: Localization of the Web and Marketing Campaigns



Torrie The Cat in the Tulips and Elvis the Big Black Dog Carrying His Sstick

Picture by Susan Eustis

WinterGreen Research, Inc.

Lexington, Massachusetts

www.wintergreenresearch.com

REPORT # SH24601513

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CHECK OUT THESE KEY TOPICS

Language Translation
Machine Language
Hybrid Translation
Software Localization

Language Teams
Key Translation Parameters
Rule-Based Machine
Translation

Statistical Machine
Translation
Linguistic Services
Language Translation Shares

Machine Language Translation Localization and Growth Strategy

**Language Translation: Market Shares, Strategies, and Forecasts, Worldwide,
2011-2017**

LEXINGTON, Massachusetts (February 24, 2011) – WinterGreen Research announces that it has a new study on Language Translation Software Market Shares and Forecasts, Worldwide, 2011-2017. The 2011 study has 784 pages, 256 tables and figures. Hybrid machine translation is evolving more sophisticated software that actually works well enough to be useful, The hybrid systems provide dramatic improvement, creating the ability to use machine translation in a wide variety of situations.

Hybrid machine translation combines the features of statistical and rules based approaches. Human language technology solution combines the strengths of rule-based and statistical systems. The term hybrid in this context means statistical MT (SMT) systems use examples and apply statistical techniques to a large body of language data to perform translations combined with rules based approaches.

Statistical SMT systems learn from text alignment rather than in depth grammatical knowledge as with rules based RBMT systems. Machine translation takes into account the grammatical structure of each language and uses contextual rules to select among multiple meanings, in order to transfer sentences from the source language (to be translated) into the target language (translation).

Rule-based machine translation (RBMT) uses linguistic rules. This means that words and phrases are translated based on an in-depth knowledge of the language. That is, the most suitable words of the target language replace the ones in the source language. RBMT provides more of a human element to the translation because the rules are user-defined based on an understanding of the target language. Rule-based methods parse a text, usually creating an intermediary, symbolic representation from which the text in the target language is generated.

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These methods require extensive vocabulary along with word meanings, how words are formed and how words are arranged to create meaning, all governed by large sets of rules. RBMT programs are highly advanced and allow a native speaker of the target language to comprehend what is written by the native speaker of the source language. The advantage of rule based translation is that it accommodates fairly abstract text and the informative aspects of the translation.

Rules based translation provides high coverage of a greater number of domains and types of texts. Rules support information being transferred from the source to the target language in an intelligent manner. Adequacy refers to the quality of the information that was transferred from the source to the target language. Globalization of the economy is occurring with the advent of the integrated enterprise. As companies position to sell goods and services worldwide, globalization becomes a fact of life. Teams of people work together from many different countries sharing workload and marketing efforts.

The globalization of the economy has brought into existence 1,000 globally integrated enterprises that sustain operations in 160 countries. These commercial organizations generally have more money than most countries, all but the largest countries. As such the commercial enterprise has become a global force, changing the nature of combat by their very existence. Even war is changing. Negotiated settlements are a result of the shift of military to peace keeping law enforcement. There is a fundamental shift in the nature of combat as military robots and unmanned vehicles get adopted.

Cell phone ubiquity, the globally integrated enterprise, the Internet, automated software translation all complement military robots to change the nature of combat. Armed intervention needs to have automated process, and the unmanned ground vehicles provide efficiency in the context of this changed war environment.

As people have more in common with each other, the world becomes a melting pot, with people within nations dependent on and interacting with people of other nations. Communication has become facilitated worldwide. Nationalistic passion has become an anachronism in this context.

Language Translation Software markets are growing because business is expanding in a manner that provides enterprise presence all over the world. Markets at \$575.5 million in 2010 are anticipated to reach \$3 billion by 2017.

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Companies Profiled

Market Leaders

**Systran
SDL / Trados**

**Lionbridge
IBM**

Market Participants

Acclaro
All Language Ltd
Alpha CRC
Asia Online
Applied Language Solutions
AVW Audio Visual
Babylon
Benesse Corporation / Berlitz
Beyondsoft
Captura Group
Ciyasoft
Comsys
Cross Language
Echo International
EQHO Communications
ForeignExchange Translations
Geo Group
Global Vibration / MSEO
Google
Government Acquisitions
HiSoft Technology
INK
Innodata Isogen
iSP

Language Engineering Company
(LEC)
Language Lens
Legal Translation Services
(LTS)LinguaLinx Language
Solutions
Localize Technologies
Lucy Software
Luz
Matrix
Milengo
Moses
MSEO
MultiCorpora
New Market Translations
NJStar Software Company*
OmniLingua
Open Text / Nstein Technologies
OmniLingua
One Planet
Opticentre
Prompt
Quagnito
Rubric

RWS
SAIC
Sakhr
Sail Labs Technology
Sail Labs Technology
Sakhr
Arabic Language
Reverso-Softissimo
Symbio
Simultaneous Interpretation
Specialists / I.S.T.S
Softissimo
Spoken Translation
SynerGlobal
TestQuest
The Big Word
TransFluenci
Translation Experts*
Translations.com
Wunderman and WPP Group /
Blast Radius
Word Magic
Yahoo!
1-800-Translate

**Language Translation: Market Shares, Strategies, and Forecasts,
Worldwide, 2011 to 2017**

Report Methodology

This is the 460th report in a series of primary market research reports that provide forecasts in communications, telecommunications, the Internet, computer, software, telephone equipment, health equipment, and energy. Automated process and significant growth potential are a priorities in topic selection. 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.

The primary research is conducted by talking to customers, distributors and companies. The survey data is not enough to make accurate assessment of market size, so WinterGreen Research looks at the value of shipments and the average price to achieve market assessments. Our track record in achieving accuracy is unsurpassed in the industry. We are known for being able to develop accurate market shares and projections. This is our specialty.

The analyst process is concentrated on getting good market numbers. This process involves looking at the markets from several different perspectives, including vendor shipments. The interview process is an essential aspect as well. We do have a lot of granular analysis of the different shipments by vendor in the study and addenda prepared after the study was published if that is appropriate.

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.

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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 2010. With 2010 and several years prior to that as a baseline, market projections were developed for 2011 through 2017. These projections are based on a combination of a consensus among the opinion leader contacts interviewed 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.

This research includes referencde to an ROI model that is part of a series that provides IT systems financial planners access to information that supports analysis of all the numbers that impact management of a product launch or large and complex data center. The methodology used in the models relates to having a sophisticated analytical technique for understanding the impact of workload on processor consumption and cost.

WinterGreen Research has looked at the metrics and independent research to develop assumptions that reflect the actual anticipated usage and cost of systems. Comparative analyses reflect the input of these values into models.

The variables and assumptions provided in the market research study and the ROI models are based on extensive experience in providing research to large enterprise organizations and data centers. The ROI models have lists of servers from different manufacturers, Systems z models from IBM, and labor costs by category around the world. This information has been developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunications, and hardware businesses.

YOU MUST HAVE THIS STUDY

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**Language Translation: Market Shares, Strategies, and Forecasts, Worldwide,
2011-2017**

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ABOUT THE COMPANY

WINTERGREEN RESEARCH, RESEARCH STRATEGY RELATES TO IDENTIFYING MARKET TRENDS THROUGH READING AND INTERVIEWING OPINION LEADERS. BY USING ANALYSIS OF PUBLISHED MATERIALS, INTERVIEW MATERIAL, PRIVATE RESEARCH, DETAILED RESEARCH, SOCIAL NETWORK MATERIALS, BLOGS, AND ELECTRONIC ANALYTICS, THE MARKET SIZE, SHARES, AND TRENDS ARE IDENTIFIED. ANALYSIS OF THE PUBLISHED MATERIALS AND INTERVIEWS PERMITS WINTERGREEN RESEARCH SENIOR ANALYSTS TO LEARN A LOT MORE ABOUT MARKETS. DISCOVERING, TRACKING, AND THINKING ABOUT MARKET TRENDS IS A HIGH PRIORITY AT WINTERGREEN RESEARCH. AS WITH ALL RESEARCH, THE VALUE PROPOSITION FOR COMPETITIVE ANALYSIS COMES FROM INTELLECTUAL INPUT.

WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, SOFTWARE, INTERNET, ENERGY GENERATION, ENERGY STORAGE, RENEWABLE ENERGY, AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ACCESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. INNOVATION THAT DRIVES MARKETS IS EXPLORED. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

THE STUDIES PROVIDE PRIMARY ANALYTICAL INSIGHT ABOUT THE MARKET PARTICIPANTS. BY PUBLISHING MATERIAL RELEVANT TO THE POSITIONING OF EACH COMPANY, READERS CAN LOOK AT THE BASIS FOR ANALYSIS. BY PROVIDING DESCRIPTIONS OF EACH MAJOR PARTICIPANT IN THE MARKET, THE READER IS NOT DEPENDENT ON ANALYST ASSUMPTIONS, THE INFORMATION BACKING THE ASSUMPTIONS IS PROVIDED, PERMITTING READERS TO EXAMINE THE BASIS FOR THE CONCLUSIONS.

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ABOUT THE PRINCIPAL AUTHORS

ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

SUSAN EUSTIS, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULTIPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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