

LISA FORUM USA
WASHINGTON DC

LISA FORUM USA 2003

Accelerating Global Understanding

Through Best Practice • Services • Language Technology and Open Standards

Hyatt Regency • Washington, D.C.
December 8 – 12, 2003

Conference Summary

Pre and Post Forum Workshops • Analyzing Global Content Management Systems • Internationalization & Localization Testing • Creating Multilingual Websites • Can Machine Translation Work For You? • Managing Localization Projects • Unicode & Asian Character Sets • Automating Localization Workflow • XML and Localization

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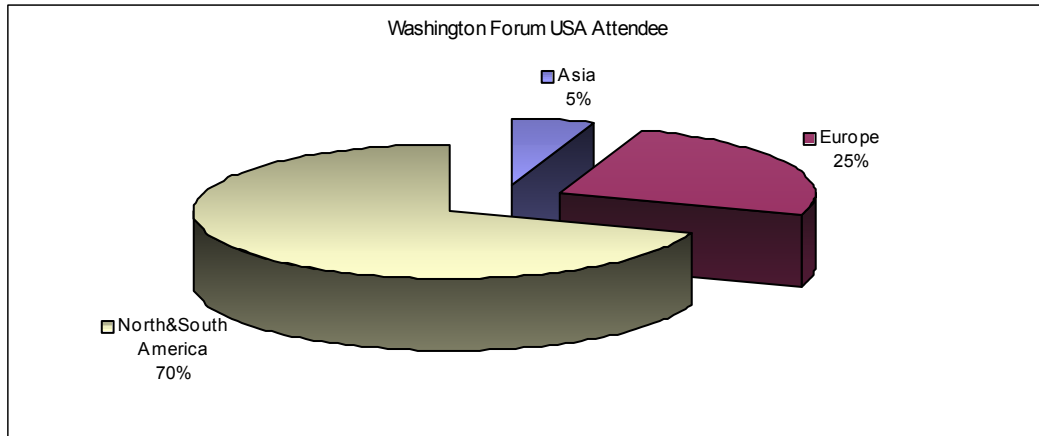
The LISA Forum USA

Annual Meeting of the General Assembly

ACCELERATING GLOBAL UNDERSTANDING

Through Best Practice • Services • Language Technology and Open Standards

December 8-12, 2003 · Hyatt Regency Hotel · Washington D.C.



Forum Overview

Attendees at the LISA Forum USA 2003 in Washington, D.C. in December again focused on today's number one international business challenge, Global Content Management. This time the focus was on accelerating global understanding through best practice, services, language technology and open standards. A total of more than forty plenary sessions, panels and workgroup discussions provided contributors from many different countries the opportunity to discuss streaming content, voice applications, translation web services, the semantic web, industry ethics, how to do business with the U.S. government and the effect of foreign policy on business operations.

Content is King

During the LISA Forum held earlier this year in San Francisco, it was clear that content was indeed coming to be recognized as a strategic asset at the corporate level. During this Forum, the buzz was, "Content is king. He who controls content, wins. She who controls terminology, controls content." And only standards can make this possible. But what is content today? Unstructured and growing by leaps and bounds in the form of streaming content of bits and pieces, voice, etc. In this new world, localization is not the enemy; it's really the enabler.

Standards are not an option, but a requirement

Alan Guibord, former President and CEO of Computerworld and now head of The Advisory Council, opened the Forum by admonishing the "IT guys" to get out of the office to learn about their companies' pain points by making friends and going to lunch, so that they can create an accurate roadmap for IT priorities. From the IT customer's perspective, standards are not an option, but a requirement. This is because you never know where content is coming from today, and you don't control it anymore. Setting the course for the future includes (1) adopting a standards-based policy; (2) accepting that an 80% solution is O.K.; (3) using database technology to fill the gaps; and (4) embracing XML as the interface to link old, new and outside technologies.

<i>Localization becomes "featurized"</i>	<p>In his keynote, Rory Cowan, CEO of Lionbridge Technologies, described his vision of the future as software moves offshore. He believes that localization will increasingly be recognized as part of a larger outsourcing trend and will eventually be "featurized" within the larger framework of offshore services. The big issue over the next ten years will be whether localization becomes just another feature in someone else's offshore business, as has happened with payroll and call center functions, or whether it will be incorporated into the enterprise development model.</p>
<i>Industry evolution on track</i>	<p>Cowan put this in perspective by reminding the audience that our industry is just like any other, in other words, "it ain't that special." Business models, such as the value S-Curve, apply to us in much the same way as to everyone else. And right now, our industry is evolving right on schedule. This means that there will be strategic inflection points along the way that will cause instability and pain. We are in one of them right now (the auto industry grew more than high tech did last year!). Cowan predicted that the BRIC (Brazil, Russia, India and China) countries will master language issues, and greater sophistication among global business leaders will remove much of the fear of moving offshore. What we're experiencing is a normal industry evolution, interrupted by the internet for a few years. A mature industry will be the result.</p>
<i>Profiting from a maturing market</i>	<p>To balance Cowan's views, Kim Harris, Managing Director of Text & Form Software-Lokalisierung GmbH, and Donald Barabé, Vice President of the Canadian Translation Bureau, moderated an excellent interactive discussion on how localization service providers might profit from a maturing market. Current "hot buttons" for the small- to medium-sized enterprise (SMA) sector include (1) the lack of exposure vis-à-vis multi-lingual vendors [MLVs], (2) currency risk management, (3) the ability to develop their own client base and (4) quality (whether customers actually care and/or are capable of measuring it).</p>
<i>Price war in Europe</i>	<p>Barabé stated that demand in our industry is rising 15-20% annually, which means that it's doubling every three to six years. And yet, there's a slump in the industry. It has turned into a price war in Europe, with the average cost per word now at 9.5 euro cents/word. This points to an incredible credibility gap. Therefore, not everyone agreed with Cowan's assertions that "just enough is good enough" for quality; that words are just a component; and that vendor management costs exceeding unit cost savings is a relic of single-language vendor (SLV) unreliability. The latter statement seems particularly unfair since the SMEs continue to be the ones who are doing the work, implementing the QA processes and providing feedback to companies such as Lionbridge. Harris still believes that there are a lot of credibility and exposure issues on both sides, but that there's enough work for everyone.</p>
<i>EU – largest translation buyer</i>	<p>Tommy Tengvall of Interverbum Localization pointed out that the consolidation described by Cowan has been very much an American consolidation. He believes that SMEs should shift their focus to the EU, where they are appreciated, especially since the EU will continue to be the largest buyer of translation services in the world for the foreseeable future.</p>
<i>Real-time Enterprise</i>	<p>On the second day, Paula Shannon, Chief Sales Officer and SVP at Lionbridge, fleshed out Cowan's theme of the Real-time Enterprise. It is all about how the move to a dynamic/extreme development environment is pushing service and technology providers to innovate and be flexible. The software industry is moving to a "sustained release" model where there are no longer any dot releases just a constant stream of content.</p>

<i>Unstructured content</i>	<p>EMC just bought Documentum, forming the fifth largest software company in the world, so it now owns structured and unstructured content. SAP won't be far behind, and Oracle can just layer on top of it. TRADOS is now integrated into the CMS platform, i.e., it's not mounted, and we have peer-to-peer networked translation memories. According to Shannon, it will be great when the authoring system embraces this since we will really have something powerful with regards to content creation, delivery and maintenance at that point.</p>
<i>Moving Offshore</i>	<p>On the process side, it's all about moving offshore and business process outsourcing (BPO). India is rapidly moving from call centers to implementation of high value, packaged applications and has now displaced Ireland in information technology enablement systems (ITES). Our industry now needs to separate language from the other pieces and transform ourselves into just another node on the network.</p>
<i>Scale does matter</i>	<p>Language technology will be embedded in platforms to multilingually enable unstructured and structured data. Language technology standards (TMX, TBX, XLIFF, TWS) will be important at the level of CMS, the authoring platforms and the large, unstructured database players. If you believe that the trend is towards more outsourcing, then scale does matter. According to Shannon, Better, Faster, Cheaper always wins, so why fight it?</p>
<i>XML – Tower of Babel</i>	<p>And lest we forget, Leo Obrst of the MITRE Corporation reminds us that XML will quickly become a new Tower of Babel, where nothing can talk to anything else, without semantics. We should all prepare for a challenging and bumpy ride as content becomes more and more unstructured.</p>
<i>Speech recognition moving to open standards</i>	<p>Much of this unstructured content will come in the form of speech and audio. Ashish Vora (Senior Speech Applications Engineer at Oracle Corporation), Marcus Graham (CEO of GM Voices), Michael Bergelson (President and CEO of Audium), Bruce Balentine (Vice President of Speech Technologies at Enterprise Integration Group), Kris Hopkins (CEO of Newfound Communications) and Dr. Amy Neustein (President and Founder of Linguistic Technology Systems) provided a wealth of information and a peak at the future in their two panels on voice. Speech recognition is changing because it's moving to open standards like VoiceXML. This means a whole new world for developers because they can develop much, much faster and maintain what they create as living systems, thus replacing the static monoliths that people are frightened to change.</p> <p>Oracle's commitment to making their voice interfaces available in thirty languages is exciting, but the two most provocative presenters were Balentine and Neustein. Balentine warned his colleagues to dispense with the focus on user delight, branding and social complexity, and get back on course and deal with real usability issues so that users can be released from "voicemail hell."</p> <p>Neustein described a new natural language processing method called Sequence Package Analysis. It makes use of what is usually thrown away during speech recognition analysis (the pauses, the intonation, the circumlocutions, etc.). The bottom line is that this technology can help shorten the development time for the grammars required by voice recognition systems. More important, perhaps, is that it appears to have the potential for a much higher rate of accuracy than searching for keywords when analyzing calls, whether they are being made to service centers or being used to plan terrorist attacks. The great news is that this methodology can adapt to the conversational sequence patterns of other languages.</p>

*Customer-Brand
interaction...
moments of truth*

John McGeehan, Senior Partner and Director of Engineering at OgilvyInteractive, brought us back down to earth by describing “moments of truth,” when a customer actually engages with a brand. For example, you decide to use your cell phone to call customer service in an airport. What happens at that point? It will make or break your relationship with that cell phone brand.

McGeehan reported on three “moments of truth” that convinced him of the need for GILT (globalization, internationalization, localization and translation) awareness and services. “It won’t play in Prague because we used a metaphor that means corruption.” There must be an easier way to develop web sites for Japan. There is . . . XML! “P13N = personalization (language problems often occur within a locale since people in different job positions usually require different types of information).”

OgilvyInteractive has learned that you must be sensitive to how brands are experienced in local places. They are not monolithic, and customers often have personal relationships with them – remember the Harley Davidson owners with the company’s logo tattooed on their arms? You have to remain sensitive to personal and cultural needs, but still maintain some central editorial control, and this is the real challenge.

*Localization is
not the enemy,
it’s the enabler*

There were many other excellent presentations, case studies and workshops on topics such as industry ethics, doing business with the U.S. Government and the effects of foreign policy on our business strategies, that space does not allow us to cover here. Please contact lisa@lisa.org to find out how to access the presentation slides. And remember . . . localization is not the enemy; it’s really the enabler.

Downloadable presentation files (slides) received from the speakers and panelists are available at the LISA Website members' domain www.lisa.org.

The LISA Forum USA 2003
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We gratefully acknowledge the assistance of
Belinda Cerullo Filippelli, Arle Lommel and
Donna Primas for their contribution.

Disclaimer

Please note that while we have given our best efforts to accurately record these summaries, no guarantee of correctness or completeness can be given.

If there are any major misinterpretations or discrepancies in the information as published, please forward corrections before December 30, 2003 to the LISA Events at events@lisa.org. Major corrections will be duly noted in the next issue of the *Globalization Insider*.