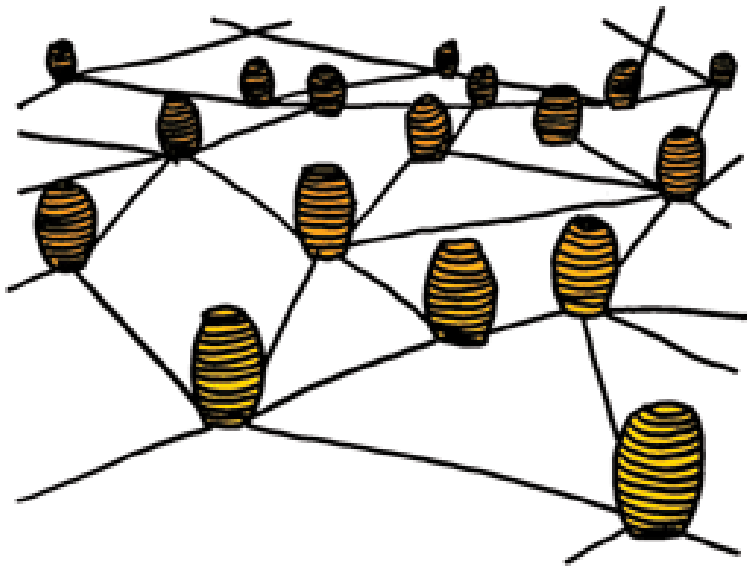# Lack of interoperability costs the translation industry a fortune

What is interoperability

Standard format for exchange of terminology	76.6%
Standard format for exchange of translation memory	**80.2%**
Standard for interaction of CMS with translation management systems and MT	79.3%
Standard business process	29.7%
Other	19.8%

Do you miss interoperability with content

	Response Percent
Yes	**63.9%**
No	36.1%

Who responded to the survey

Large buyer of translation (budget > 10 Million Euro/Dollar)	10.9%
Smaller buyer of translation (budget < 10 Million Euro/Dollar)	19.1%
Language service provider	**41.8%**
Language technology provider	7.3%
Translator	8.2%
Other	12.7%

How much does it cost you

less than 5%	9.0%
more than 5% and less than 10%	12.6%
more than 10% and less than 20%	12.6%
more than 20% and less than 30%	11.7%
more than 30%	12.6%
Don't know	43.2%

Couldn't give a figure, but I'm sure it costs a lot of efforts in terms of adjusting and hacking formats

Impossible to count

As a not-so-small LSP, more than 40% of our headcount goes into people fixing up interoperability issues

I would say it costs at least one head count.

I believe that the costs are very high for my customers, and for my operating expenses, as well.

Don't know but I guess it is very high.

Where is the friction

Content Management Systems (CMS)	67.9%
Translation Management Systems (TMS) or Global Content Management Systems (GCMS)	66.1%
Translation Memory (TM)	80.7%
Machine Translation (MT)	45.9%
Terminology Management	78.0%
Localization Workbench/CAT Tools	60.6%
Quality Assurance/Testing	48.6%
Online/cloud-based resources (e.g., shared TM, terminology)	30.3%
We do not face any interoperability/integration issues in our organization.	0.9%

MSOffice formats

CMS to and from T&L systems

What is important

	Not important	Less important	More important	Most important	Rating Average
Increase consistency in terminology to improve end-user satisfaction.	1.8% (2)	10.0% (11)	53.6% (59)	34.5% (38)	3.21
Sharing translation corpora to assist in the training of machine translation engines.	8.3% (9)	36.1% (39)	35.2% (38)	20.4% (22)	2.68
Reduce translation management and overhead costs.	0.0% (0)	10.9% (12)	44.5% (49)	44.5% (49)	3.34
Integrate translation in the overall content management process.	1.9% (2)	15.0% (16)	46.7% (50)	36.4% (39)	3.18
Increased leveraging from shared translation memories.	3.6% (4)	20.9% (23)	46.4% (51)	29.1% (32)	3.01
Improve translation quality.	0.9% (1)	12.7% (14)	40.9% (45)	45.5% (50)	3.31
Standardize and simplify translation business processes	1.0% (1)	8.7% (9)	35.9% (37)	54.4% (56)	3.44

Ensure you can move from one supplier to another if needed.
ability to switch technology providers

Biggest barriers

	No barrier	Low barrier	High barrier	Highest barrier	Rating Average
Legal restrictions, confidentiality of information.	5.6% (6)	52.8% (57)	27.8% (30)	13.9% (15)	2.50
Lack of compliance to interchange format standards.	0.0% (0)	22.4% (24)	48.6% (52	29.0% (31)	3.07
No organizing body or umbrella organization capable of leading the effort and monitoring the compliance.	4.5% (5)	21.8% (24)	48.2% (53)	25.5% (28)	2.95
Lack of maturity in the translation industry.	5.5% (6)	37.3% (41)	36.4% (40)	20.9% (23)	2.73
Apathy. People don't care.	5.6% (6)	29.9% (32)	45.8% (49)	18.7% (20)	2.78
Few suppliers dominate translation technology sector.	1.9% (2)	32.4% (35)	31.5% (34)	34.3% (37)	2.98
Lack of budget to apply to the problem.	8.7% (9)	37.9% (39)	38.8% (40)	14.6% (15)	2.59

Interoperability goes against the interests of market leaders.
For managers within institutions, the fear that improvement of process could reduce the span of their "powers", their importance as managers.
Fear of loss of business assets/competitive advantage built up over years. Uncertainty about potential gains

Most important standards

	Not important	Less important	More important	Most important	Rating Average
TMX	1.9% (2)	3.7% (4)	30.6% (33)	63.9% (69)	3.56
TBX	10.2% (10)	22.4% (22)	42.9% (42)	24.5% (24)	2.82
XLIFF	5.7% (6)	18.9% (20)	30.2% (32)	45.3% (48)	3.15
OLIF	31.8% (28)	60.2% (53)	3.4% (3)	4.5% (4)	1.81
OAXAL	36.8% (32)	51.7% (45)	5.7% (5)	5.7% (5)	1.80
Other	23.1% (9)	33.3% (13)	17.9% (7)	25.6% (10)	2.46

INX/IDML MIF   **CMIS**

**Not localization specific, but still very important:
SOAP, REST, CMIS**

LSPKG (Microsoft Loc Studio)

Industry perspectives/personalities

‣ Believers

‣ Realists

‣ Pragmatists

Believers

▸ Awareness programs

▸ Education

▸ Penalties

▸ Certification

▸ Compliance

Believers

"We should be telling our vendors what they need to comply with, and penalizing them if they don't…"
We need to show the "ROI of interoperability", "educate clients on the benefits so that they press vendors to be compliant"
"We need to create awareness, publish white papers about the benefits"
"neutral body will evaluate tools periodically for compliance and that the evaluation reports will be made public"
"a certification program to adhere to standards,
"world level governing body to set standards for all companies developing translation tools."

Believers

"there should be an active organization to address standards, with participation from tool vendors as well as the companies who buy and use the tools. Unfortunately, I don't think the tool vendors are very concerned about interoperability – they're more concerned to make their own products work together. The industry is so immature that many vendors still lean towards proprietary formats and functionalities."

an "industry body should lead the effort in removing the barriers and streamlining new initiatives and monitoring their compliance and progress."

▸ **"A task force should be created to hammer out a few very clear goals. These should be pursued under the leadership of a charismatic persuasive authoritative figure with the respect and trust of everyone in the business,"**

Realists

▸ Accept market forces.

▸ Lack of interoperability is just the cost of doing business with multiple vendors and different tools.

▸ They are not giving up, but it seems that they are leaning more towards using market forces rather than resisting them.

Realists

"Technology and incompatibility is used as a competitive advantage. To improve interoperability we need to demonstrate that interoperability is a business advantage to those who promote it, and find a way to fund research, development and deployment of standards."

"translators may refuse jobs because they don't like the CAT tool requirement."

"We've seen leveraging loss of more than 20% when we switched from one CAT tool to another using TMX for data migration. In order to try to reduce the loss, various resources had to work to put in workarounds. So, total cost due to the interoperability problem is a lot higher than what's easily quantifiable."

"We simply don't switch vendors or translators"

Realists

"We need to accept that standards will never completely solve the issues. Travel, accounting and banks all have international issues. They've just streamlined as much as possible via standards. So let's focus on the quick wins that simple standards can bring us and worry less about trying to solve the entire problem. I believe that will allow for early wins and drive a faster adoption of a standard."

"in addition to TMX, TBX, XLIFF and SRX, the industry needs to adopt a CMS integration standard allowing content to flow between all the technologies involved in the content lifecycle (from source language creation to multi-language publishing)."

Realists

"For a freelance translator the problems can result in hours of lost productivity. This eventually results in a loss of translators or an increase in rates. If translators could be more productive, then rates would naturally decrease as a simple function of supply and demand."
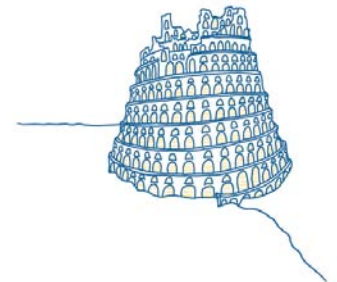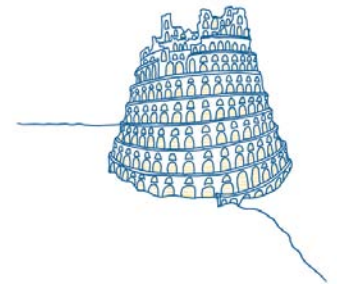
Pragmatists

▸ The pragmatists do not fight the status quo, but put their bets on a wave of innovation that has started rolling over the translation industry.

Pragmatists

"It takes adoption of new models where buyers become confident of procuring translation regardless of the choice of tools utilized to produce these. Translation to become agnostic of the tool-set. I feel technology providers have too high interests in not making themselves redundant or interchangeable. If translation agnostic from the tool-set is the ultimate goal, this will place a new healthy focus on the Human Translator profession as the real differentiator."

Pragmatists

"Fast, collaborative translation processes require a translation vendor base with instantly available and interoperable tools. The current mix of free, cloud-based, licensed, SaaS, and LSP-hosted tools lacks sufficient interoperability and act as a barrier of growth. Kicking in large multi-vendor projects is slower and more error-prone than desired, even with hosted server-based solutions. Perhaps a drive for interoperability should come from MT vendors as the potential growth area for the industry."

"Innovation will focus us (again) on the only real differentiator in the translation industry, that is the "Human Translator".

Do you recognize yourself?

▸ Believers

▸ Realists

▸ Pragmatists

Industry in 5 Years
Thinking about drivers/trends

Certain

‣ Explosion in new content

‣ Shift from text to text and multi-media (word counts go down)

‣ Mobile user, hand held devices

‣ Real time/Just in time demand

‣ Cross-lingual translation challenges

‣ Balance of cost, timeliness and quality

Uncertain

‣ Open (collaborative) vs Closed (competitive)?

‣ Fee vs free?

‣ Human vs Machine? (incremental step or technology breakthrough)

Industry in 5 Years

SWOT

Content disruption

Data assessment

Innovation dilemma

Machines

**Open
(Collaborative)**

**Closed
(Competitive)**

?

Human & Machine

SWOT for Enterprise Language Service

S

- **High leverage from TM**
- **Well established process and management**

W

- **Quality inconsistent (local flavor missing)**
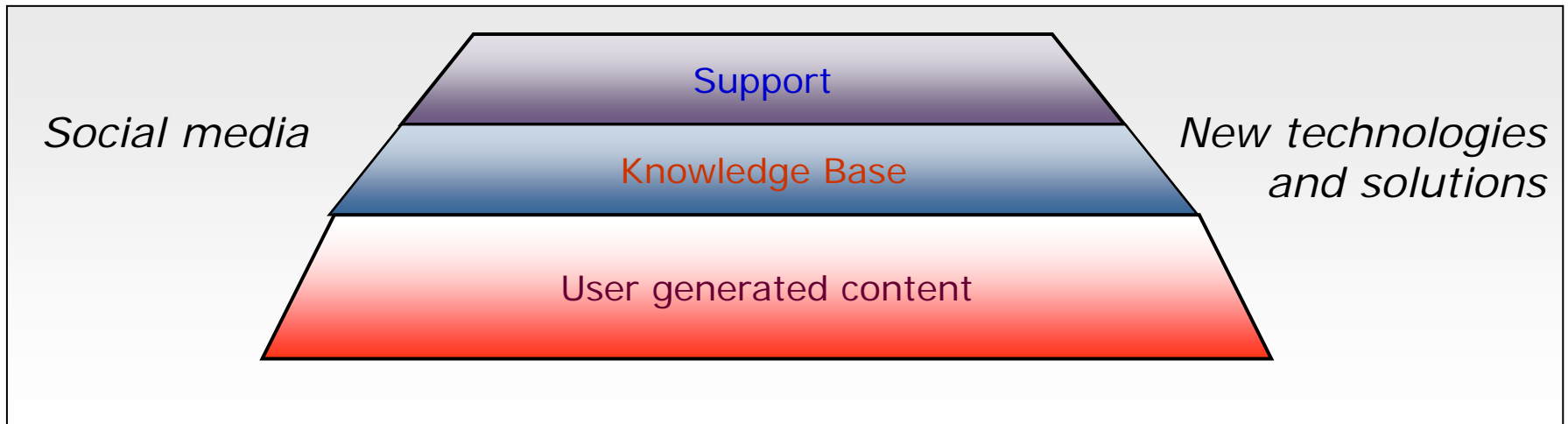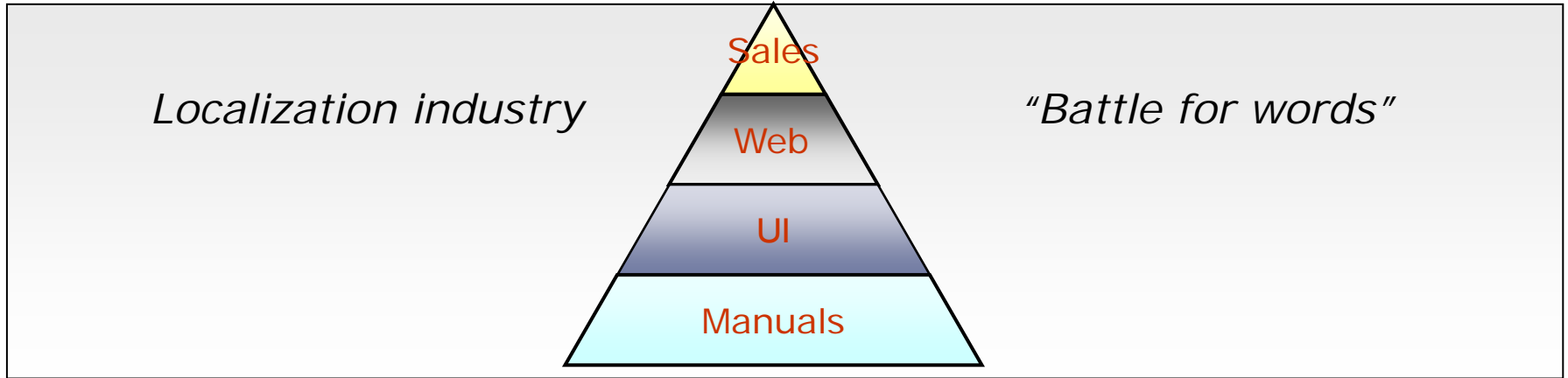- **Lack of flexibility, reactive rather than creative**

O

- **Opening new markets with MT**
- **Engaging with users & communities**
- **Convergence with video and speech**
- **Search engine optimization**
- **Translation of user generated content**

T

- **Rigid landscape (vendor lock-in)**
- **Not scalable to expand quickly**
- **Inability to ensure quality in new markets**
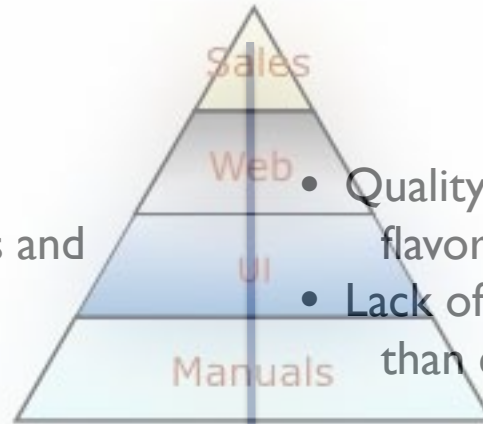- **Lack of corporate awareness of new locales**

Content Disruption

Innovation Dilemma

S

- High leverage from TM
- Well established process and management

W

- Quality inconsistent (local flavor missing)
- Lack of flexibility (reactive, rather than creative)

O

- Opening new markets with MT
- Community/user feedback
- Convergence with video and speech
- Search engine optimization
- Translation of user generated content

T

- Rigid landscape (vendor lock-in)
- Not scalable to quickly support new markets
- Inability to ensure quality in new markets
- Lack of corporate awareness of new locales

Sales
Web
UI
Manuals
Support
Knowledge Base
User generated content

Innovation Dilemma

S
- High leverage from TM
- Well established process and management

W
- Quality inconsistent (local flavor missing)
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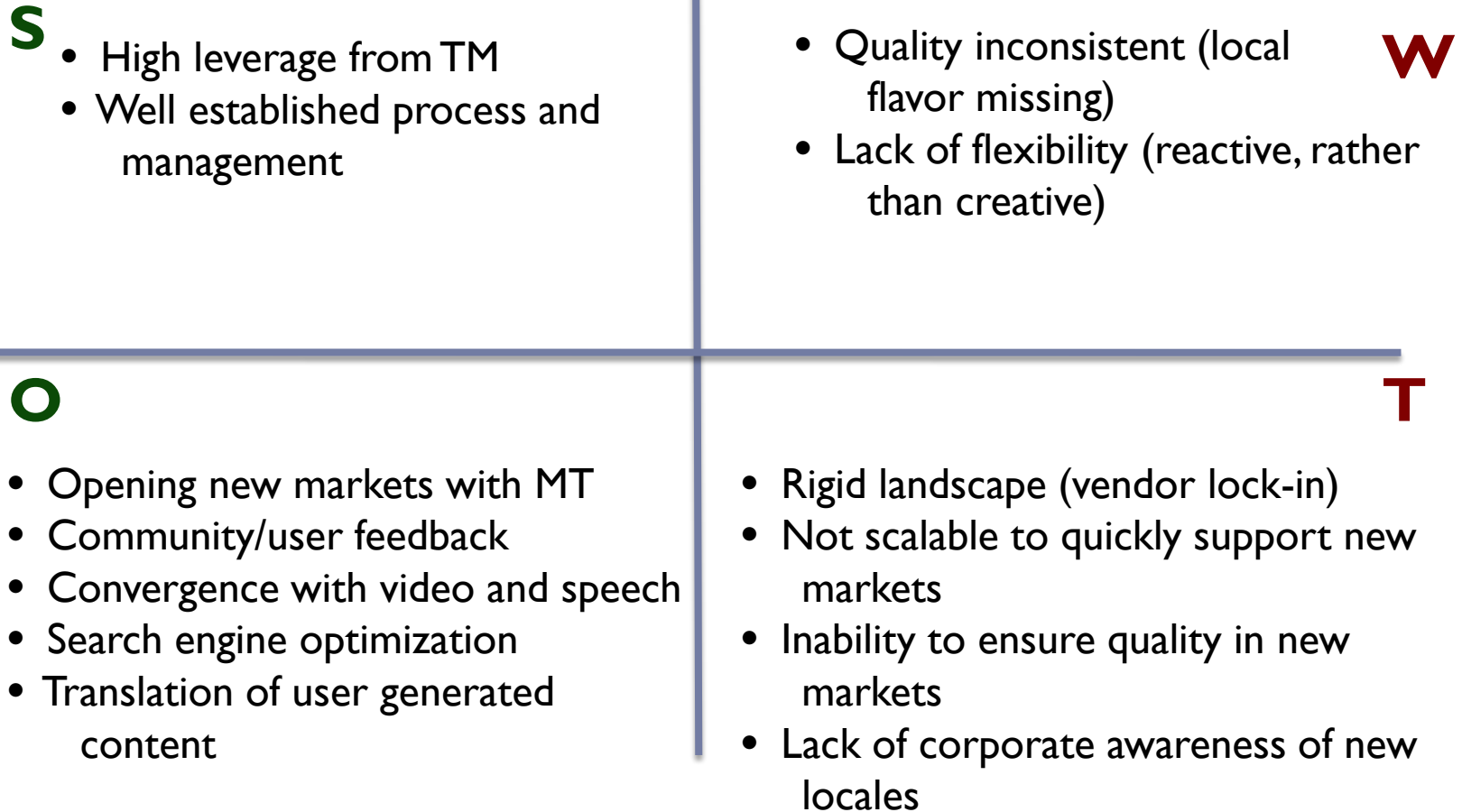- Translation of user generated content

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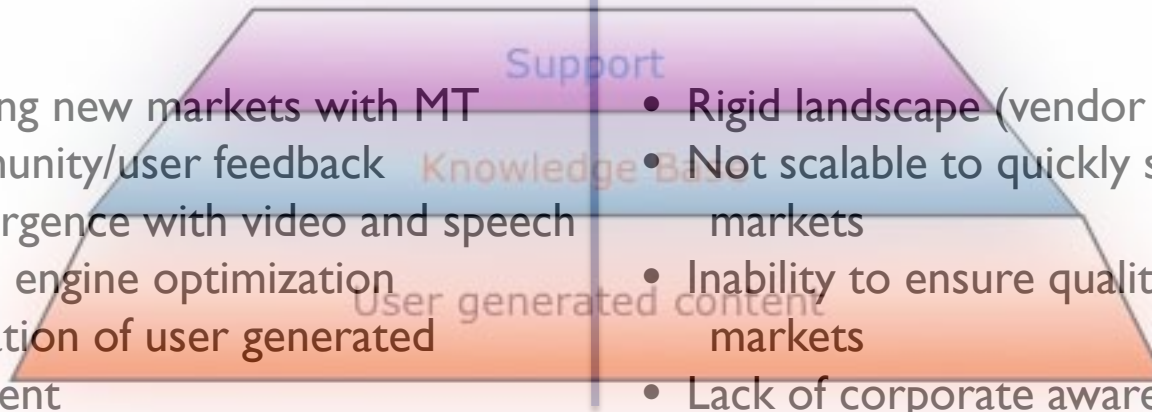
Business Model Attributes

Old Model

1. **One translation fits all**
2. **Project-based translation**
3. **TM is core**
4. **One-directional**

5. **Word-based pricing**
6. **GMS system**
7. **Cascaded supply chain**
8. **Translate-Edit-Proof**

New Model

1. **Quality differentiation**
2. **Continuous translation**
3. **Data is core**
4. **Multi-directional**

5. **SaaS – Value-add**
6. **MT embedded**
7. **Community – user**
8. **Post-edit – Real-time – Peer review**

Content Differentiation
Utility – Time – Sentiment assessment

On a scale from 1 to 5

	Utility	Time	Sentiment
Instructions for use	5	3	2
KB article	5	4	1
E-newsletter	2	2	4
Blog	4	3	3
User review	4	3	2
Chat	4	4	1
Home page	3	1	5

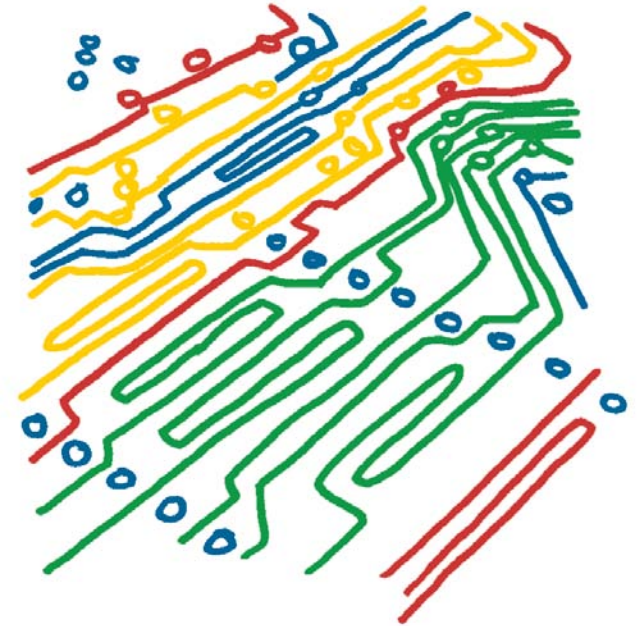**Ubiquitous not-perfect MT will drive the need for high-quality translation.**
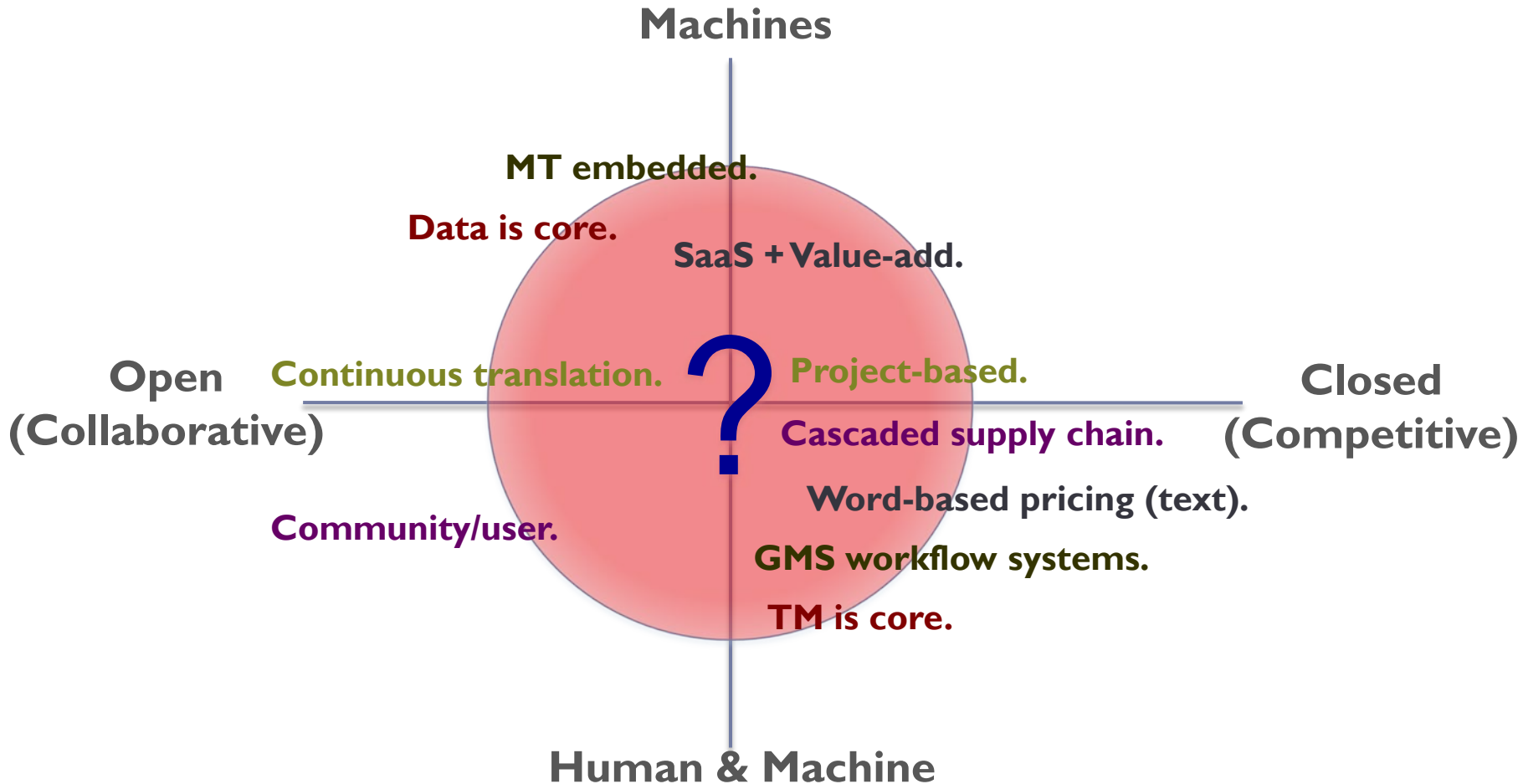
Enterprises in 5 Years

Need a Language Strategy
not just reducing word rates

Enterprises in 5 Years

The Interoperability Agenda

‣ Interchange format standards: XLIFF, TMX, …

  ‣ Standards bodies: OASIS, ETSI

‣ Translation packet standard: 'container'

  ‣ Alan Melby, Arle Lommel

‣ Content integration standard

  ‣ LT Web

‣ Interoperability surveillance

  ‣ TAUS

TAUS Interoperability Work Program

- Open Translation Platforms, since 2008
    - Separating Infra & Lingua: "open-open-open"
    - Education, awareness, white papers, use cases
- Interoperability Watchdog,
    - Interoperability Dashboard
    - Outreach and promotion of interoperability
    - Representation on standards bodies
- Quality Evaluation Benchmarking Metrics
    - Dynamic benchmarking: MT and human translation
- LT-Web consortium
    - Content management integration
    - Market outreach

Changing Landscape

▸ More change in the next 5 years than in the past 25 years

 ▸ Impacts of social media and mobile

 ▸ Language data sharing *(TDA has opened free services to the public)*

Translation in the 21st Century

Final Words

- Translation industry is finally becoming interesting.

Strategic   **Efficient**   **Let's enjoy that!**

Let's not create a "Translation State".....

- Language is a "living product".
- Every speaker of a language has the right to change their language.