# Interview:
Rose Lockwood

Rose Lockwood on trends in globalization,
localization, and translation

As a language-technology market expert, sometime Ovum consultant and project manager for the European Commission's ongoing EUROMAP project, Rose Lockwood is one of the language industry's most respected analysts. In particular she was lead author for Ovum's major report Globalization: Creating New Markets with Translation Technology, and director of the ITALICS conference on Globalization held in Rotterdam in 1995. *Language International* interviewed her recently in London about her "effort to think coherently about what language services really mean for business."

What does the term "globalization" mean in the language context?

Rose Lockwood: First and foremost, we must not confuse global companies with what I call PONs—plain old multinationals. PONs are companies that simply spread like clones around the world, selling their drinks or photocopiers, and setting themselves up as a replica of the exemplary home organization. Truly globalized companies are completely different types of business. They view their whole worldwide organization as *the* organization. They are not organized hierarchically, from the home HQ down; rather, they operate in terms of tasks and functions. Their natural model is the matrix, not the pyramid. As a result, you get the team phenomenon, where people from different corners of the world work together on say, designing the wing of an airplane. This is very different from the "old" PON approach to doing business across frontiers and languages.

This organization impacts the language field in two key ways. First, due to the way work is organized, you get far more complex communication across language barriers than people had ever envisaged before. This leads to more multilingual support, for example inside the teams themselves, with growing translation needs for technical documentation both internally and externally. Second, there is a new relationship between the increased number of actual documents produced and the increased numbers of languages treated. More types of documents and more languages means many more actual tokens of any piece of multilingual information. In an age of globalized companies, you have to add in the complexity of all the delivery platforms providing this material (CD-ROM, Web pages etc.). So when you add all these bits together, you get a geometric rather than
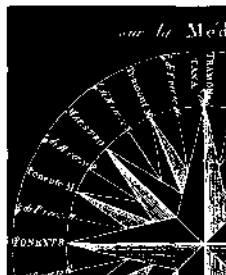
Rose Lockwood
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simply arithmetic increase in the complexity and volume of language to be handled.

All this means that in a globalized context, documentation is more complicated, more demanding, and more expensive than it was, say 10 years ago. And this phenomenon is a major driver of multilingual services.

How are globalizing companies dealing with this language challenge?

RL: I have found that what users of language services would like in theory is to be able to go straight to a global-service supplier—a one-stop outfit that would do the whole job, from documentation to product information on every possible delivery platform. But in fact there are no truly global multilingual service suppliers, even though many say they are. No supplier today is "universal."

At the same time, language-service users are frankly a bit schizophrenic. While one part of them wants to out-source all their multilingual documentation and localizing needs to a single supplier-cum-partner, they are nearly always skeptical of not getting a good deal unless they keep their vendors competitive. So in the 1990s model, software companies in Europe for example tend to have two or three selected vendors for each target language community and make them all bid for each localization job.

In my opinion, this will prove to be an interim solution and things will eventually mature. There will eventually be truly global language-service suppliers—we can already see certain companies positioning themselves in readiness for a global offer, through buy-outs and network extensions. And I am also convinced that demand-side companies will eventually come to the point where they will trust a single global vendor to handle their language needs. Mainly because they will have grown to rely on the technology infrastructure that goes along with these services. Like any large-scale out-sourcing function, if language services become strongly technologically based, it will be very hard for users to disengage from the hard wiring. So I think that the globalization of service suppliers will follow the globalization of their customers.

What do globalized services actually involve?

RL: There is not much point these days putting up your plaque saying "Any Language Anywhere Any Time SA/Sarl/GmbH/Plc/Inc." What the industry needs is in-country native speakers to do the translation. The old-fashioned approach was for translation suppliers to get hold of anyone in the locality with the right knowledge and language combination (university students, say, or the immigrant population in general).

Another now-outdated belief was that an exporter company needed to keep up the illusion that they actually had an in-house translation department capable of providing services to their customers, even though in fact they were using freelancers to do the work. All this mindset is now changing: truly distributed translator networks are both feasible and acceptable.

For the big localizer firms, this raises the problem of how to best manage your network of freelancers. It is pretty well agreed that you have to have some kind of local management for a big job, even if it is only a project manager working on-site with the company you are localizing for. So we come back to the matrix structure again, with complex horizontal relationships which ensure both global planning (worldwide) and local execution (in Europe, Taiwan, etc.) when needed. It is precisely this kind of logistics headache that makes it so hard to set yourself up as a truly global supplier.

So what are translation suppliers actually doing to meet this need?

RL: They are either taking partners on board or they are getting acquired by large companies. I reckon what I call "yellow pages" translation companies, i.e., those that depend on a loose

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network of freelancers at the lowest tier of the market, will be especially at risk in this kind of environment. As in many areas of business, these "middle men" will eventually disappear, to the greater advantage of the entrepreneurial freelancer. The reason is that technology support will enable independent translators to be networked into complex service environments on an ad-hoc basis. This will offer a great way for them to get at new business opportunities. But it also means far fewer secure in-house jobs.

Although others have expressed contrary views, I feel that translation will continue to be a cottage industry, but as employment patterns change, it will become a high-tech cottage industry. There is likely to be a growing population of highly sophisticated independent workers rather than "factories" of translators.

The new model for all this will be online translation services. Ad-hoc translation—small volume, unpredictable texts—will all be done online since you can get the best service at the cheapest price. What happens behind the Web-site door is another question. A supplier will use human or machine translation or both to meet their customer needs. All MT companies, for example, now offer this sort of service, though perhaps humans are doing some of the actual translation! The premium supplier that can bring the technology and translation capacities seamlessly together into a truly online service-counter will be a truly revolutionary company.

What role does machine translation (MT) play in globalization?

RL: One obvious reason for using MT is when a company's need for translation is really desperate. For example, the need for rapid documentation availability following a corporate takeover. Another, more interesting reason, is the emerging availability of networked organizations. For instance, the US government is installing UNIX versions of Systran as an on-request MT engine on the government network, where anyone can use it to raw translate nonpublishable documents for information purposes.

This whole movement is largely enabled by the enormous mass of available electronic documents in foreign languages. So more diversified use of MT appears to be a direct result of technology convergence and the globalization of organizations.

Is Europe's language situation a model for the future—or an example to avoid—for the multilingual information society?

RL: Multilinguality is a particularly European problem; there is no other economic trading area with the same degree of linguistic complexity in business interactions. If the Europeans took global multilingual information management seriously as a high priority issue at the level of business, culture and technology, then Europe would offer a viable model.

It would be able to derive real benefits from reducing the barriers to doing business within Europe, while at the same time retaining the actual business of "doing multilinguality" itself, instead of running the risk of having the Americans come in and fix it for them. In my opinion, this whole area is a European opportunity worth grasping. But time is running out.