

## Did Ovum get it right?

Ovum's 1991 report *Natural Language Markets: Commercial Strategies*, despite its usefulness as a very accessible compendium of information for the NLP neophyte, leaves the seasoned LIM reader with some sticky questions. Those of us who have been in this field long enough to have read Ovum's *Natural Language Computing: the Commercial Applications*, (1986, by Tim Johnson) will remember the boom it (incorrectly) forecast for the talk-writer. According to Johnson's timescale, there should have been plenty of these things around offices today. Have you come across one lately?

In Ovum's recent NL report, the talkwriter boom has wisely been shifted towards the end of the present decade. Maybe I would have done the same, and I admit that forecasting is exceedingly difficult, but the reasoning to support a market share of fifty-five percent in natural language applications by the end of the century is not entirely convincing.

Take the authors' assumption that the market for dictation machines will ultimately include "anyone who writes original text." No significant body of practical experience with general purpose voicewriters for the non-handicapped has been accumulated yet. Prolonged dictation by a large population of computer users might result in new problems: less deliberate wording, distracting noise in the office, repetitive-throat-strain disease... Would it not be safer to assume that a variety of text-entry devices (conventional and alternative keyboards, pens, etc.) will persist after the advent of full-blown speech recognition?

Another very controversial comment is: "MT will always be more in demand in continental European countries." The simplest reasoning is perhaps to equate MT with multilingual areas on the world map. But that is only half the story. The other half is export-driven high-tech industries and their enormous multilingual documentation requirements. Product documentation is one of the largest markets of all for MT, and the biggest industrial user of MT in Europe is Rank Xerox. Another big user is Perkins Engines, which was mentioned in the appendix on users. If and when American industry ever takes exporting seriously in its economic struggle with Japan, it may turn out to become a huge MT user too.

### Europe in the back seat?...

The most puzzling aspect of this report, however, is the backseat position predicted for Europe. Whereas two years ago, Klaus Obermier in his book *NLP Technologies in AI — The Science and Industry Perspective* (Ellis Horwood, 1989) affirmed that "internationally the European market is much more NL oriented..." and went on to say that "Japan and Europe will become the leaders in NLP technology, especially in the area of speech, NL interfaces, etc." The Ovum report, in its management summary, highlights the predominance of English among computer users in Europe and underlines the US government support (DARPA) for NLP. Except for MT, Europe will lag far behind the US in profitable NL applications — if we are to believe Ovum. And nowhere in the report can a single word be found about the European Commission's language industry initiative of the last few years.

If this omission and the grim outlook for European NL markets are well-founded, the Ovum report represents a severe blow to the face of the Commission. The report's principal author, Ovum consultant Brigitte Engelen, appears to have done a language technology survey for the Commission recently, so it is hard to believe she is ignorant of the Commission's substantial efforts to support NLP.

### And where's Japan?

Another unforgivable omission is the lack of any reference to Japan's role in the field of NLP. Ovum claims to offer an "international outlook," with research and consultancy activities which "take the company's consultants throughout Europe, North America, Australia, and the Far East." Even if we accept a British perspective, companies such as Canon and Sharp have established research centers with NLP development programs in Cambridge and Surrey.

Finally, a brief mention of neural network technology would have been appropriate in the section on technology trends. It is not such a big mental step up from statistics-based processing, which was mentioned.

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