



**ELIA Networking Days
5-7 October 2014
Tuscany**

**Building the Language-
neutral Digital Single
Market for Content**

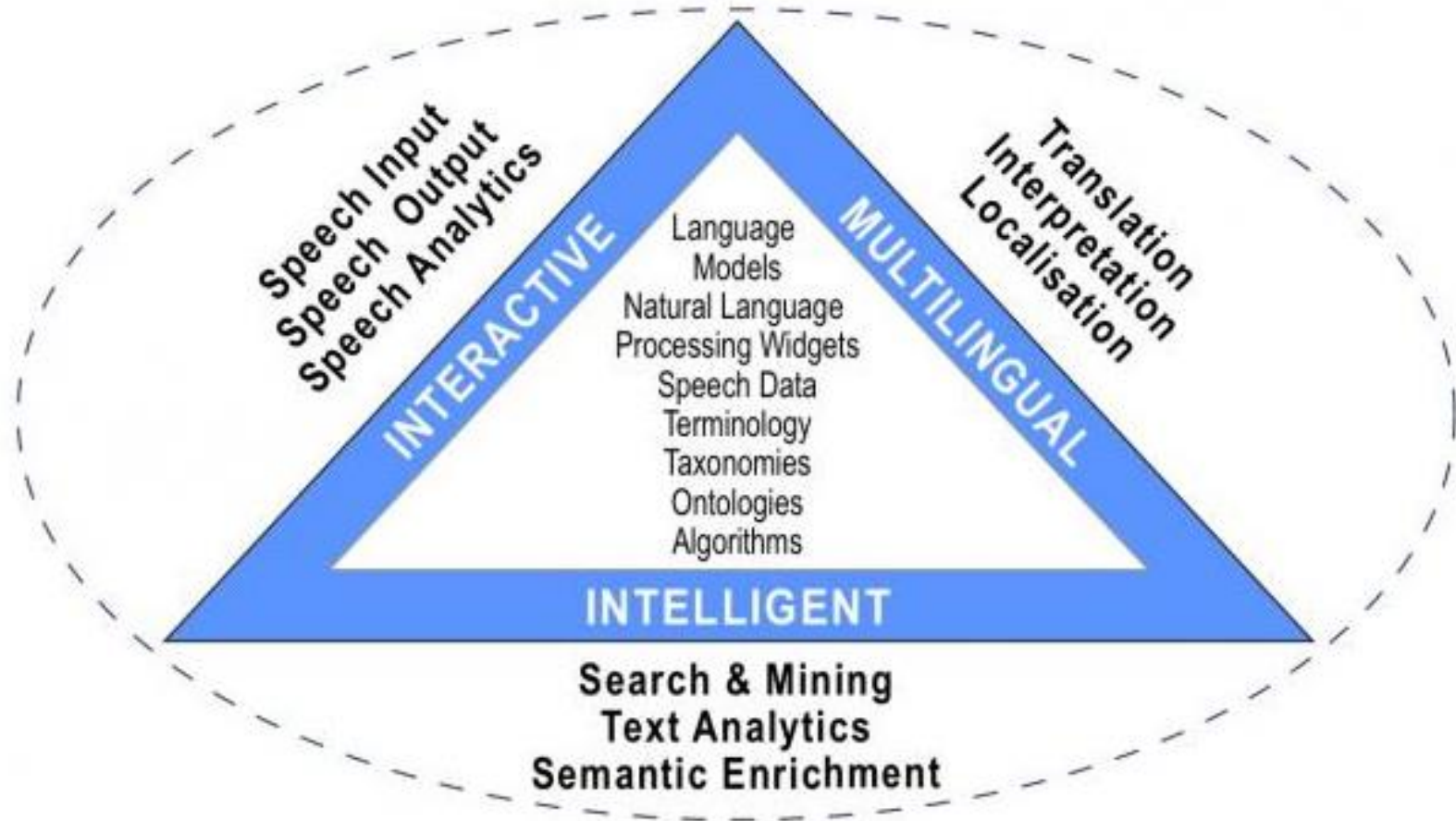


- LT-Innovate is the Forum for Europe's Language Technology Industry
- Founded as a Special Interest Group in January 2012, it was incorporated as a not-for-profit association in October 2012
- Core members are Language Technology vendors (180 in 25 countries as of October 2014)
- Associate members are other LT stakeholders (100+ buyers, applied researchers, integrators, etc.)

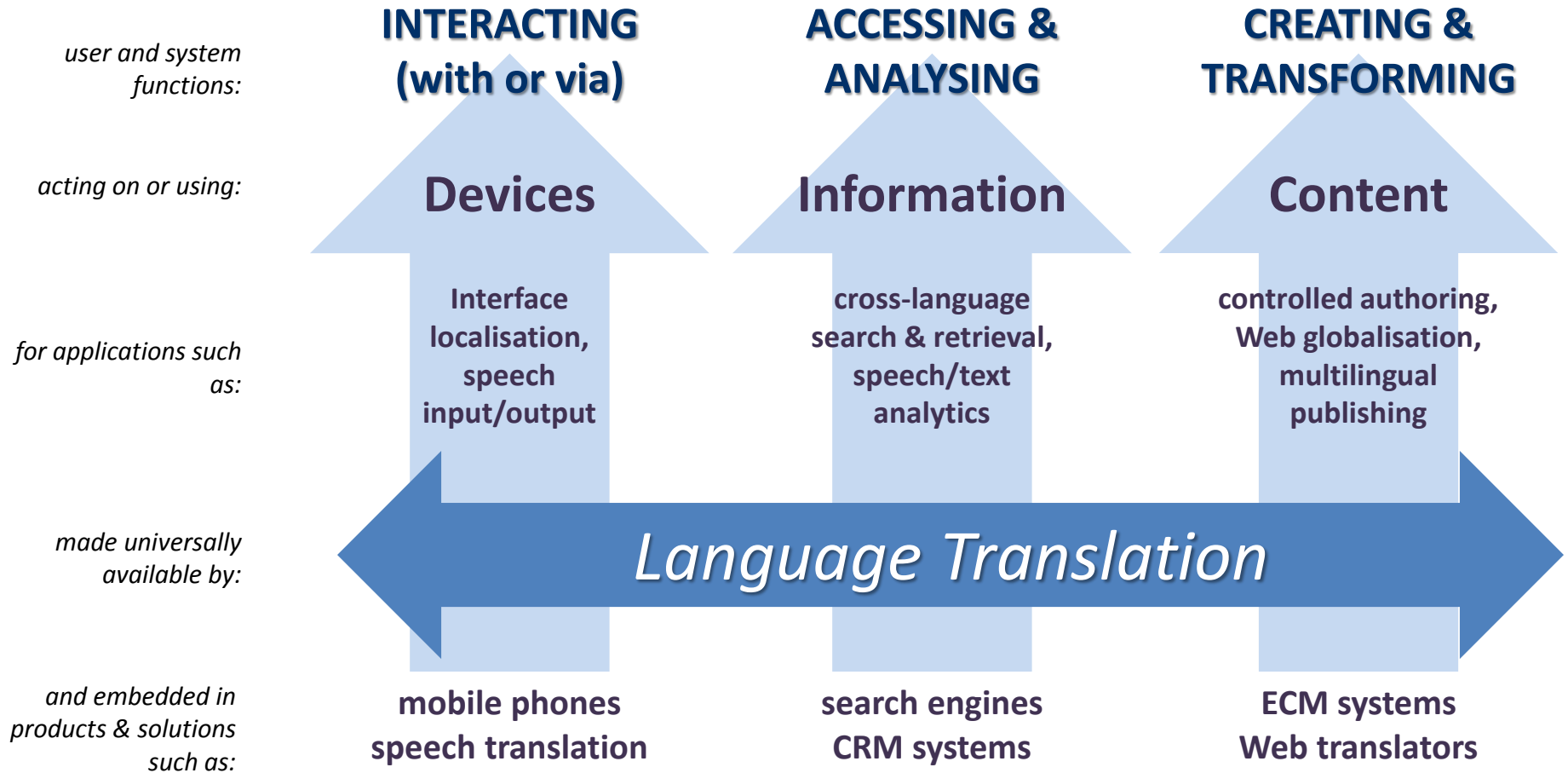
What is Language Technology?



- Language technology covers intelligent content, conversational interaction and translation technologies.
- Language Technology is pervasive and, by nature a key enabling technology in a multilingual world.
- Language technology enhances products and services in high growth markets such as mobile applications, healthcare, IT professional services, financial services, online retail, transport & logistics, tourism, publishing and many more.



What is LT used for?





LT: one or several industries?

To explore strange new worlds, to seek out new data
and new knowledge, to boldly go where LT has not
gone before...



<http://bit.ly/13UAaST>

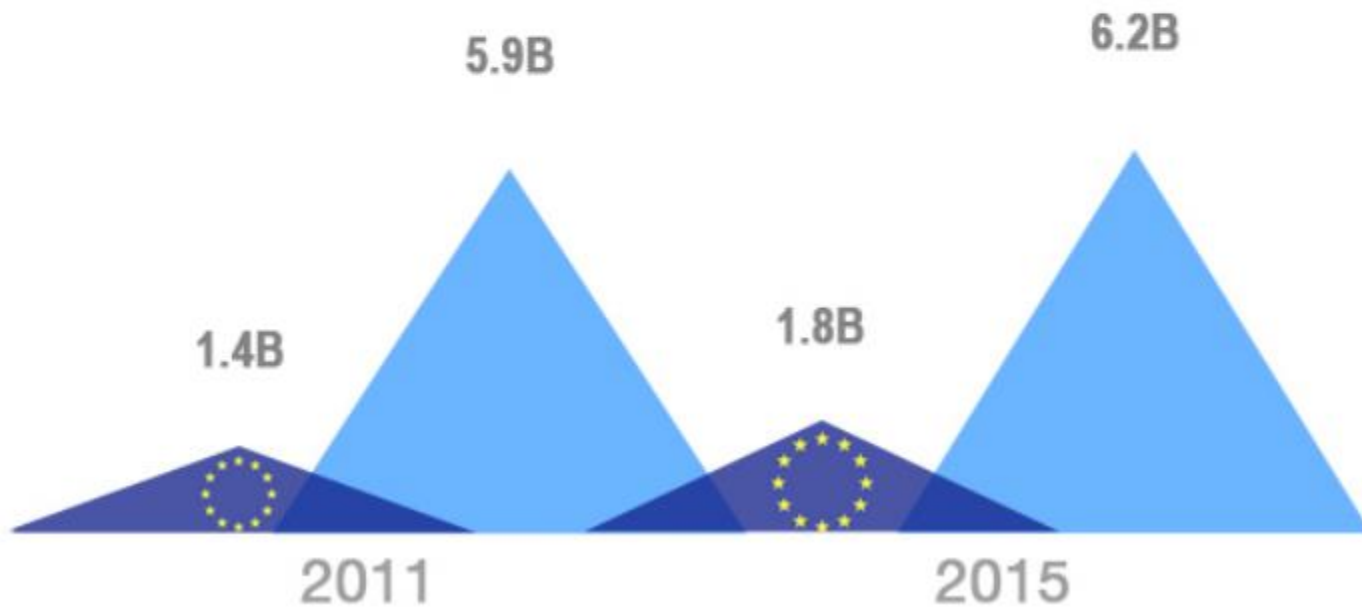
Discover the world of
Language Technologies:
Download LT2013!



<http://bit.ly/13UAaST>

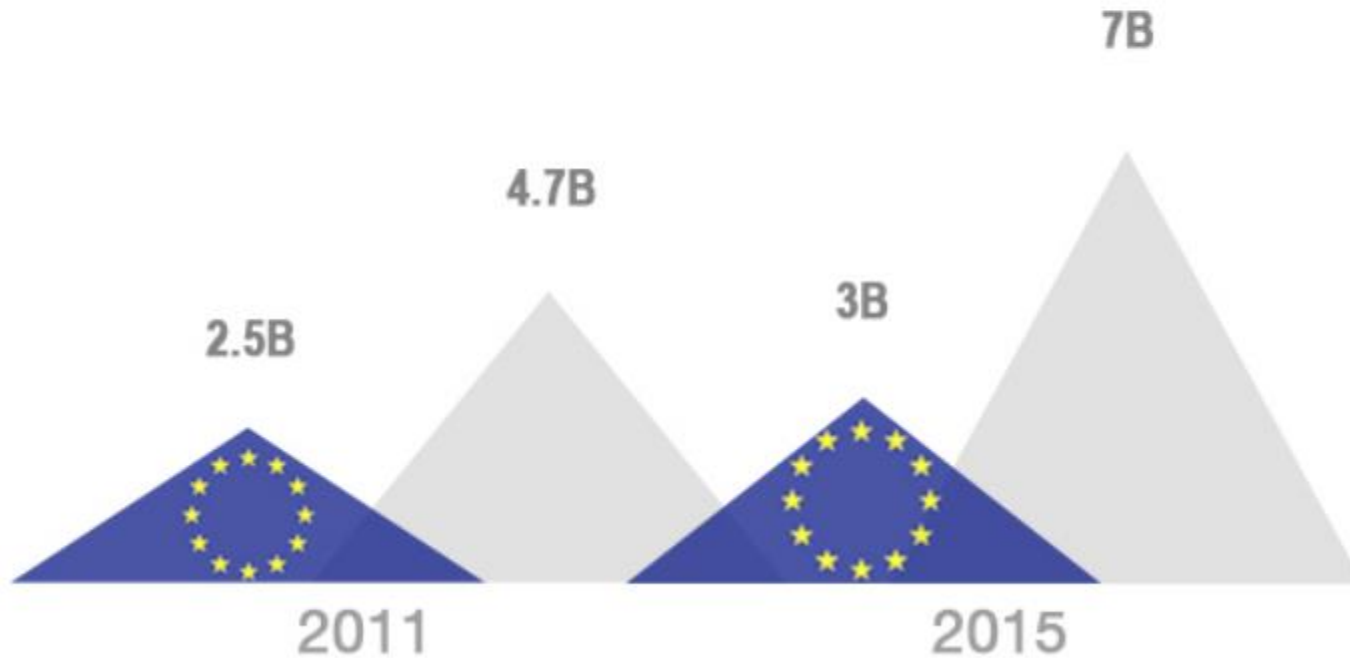
3 Strategic Technology Markets

INTELLIGENT CONTENT: making it quicker and easier to process and search written and spoken data of all kinds.



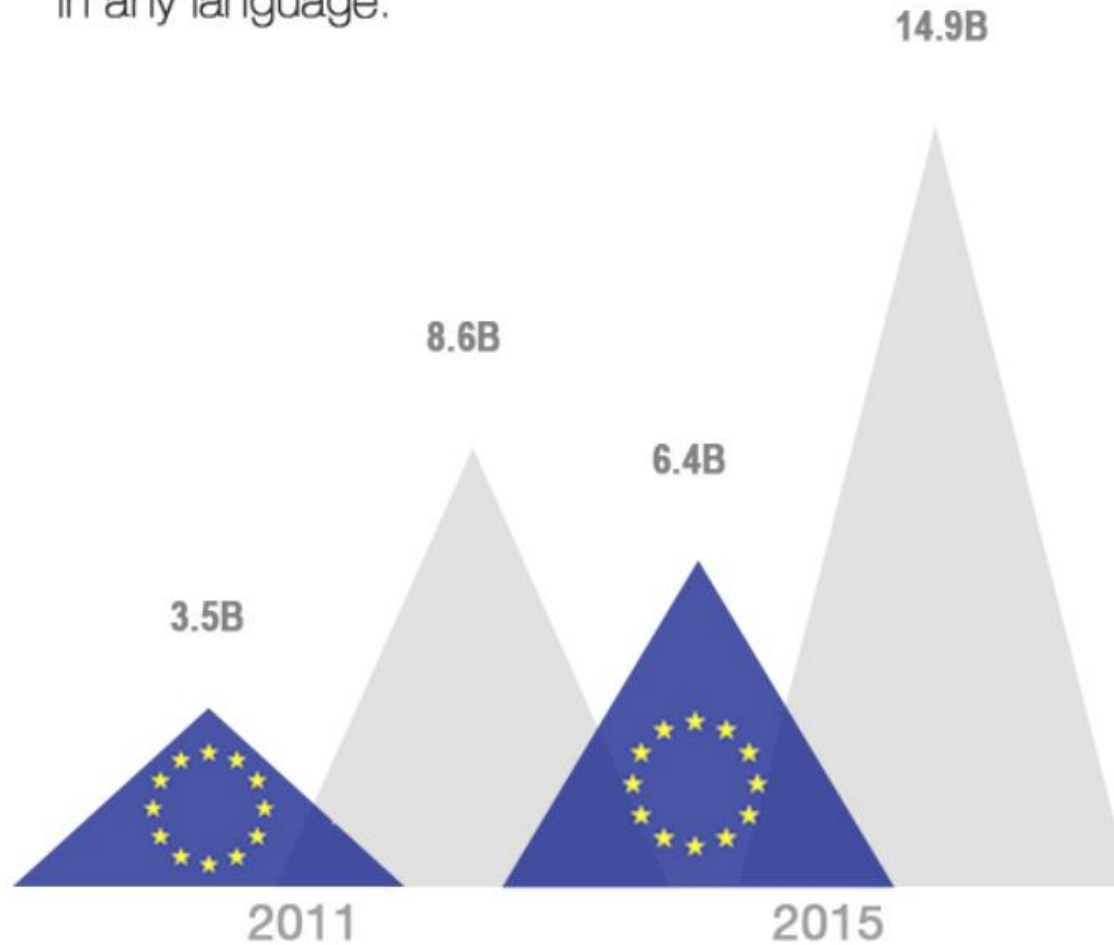
3 Strategic Technology Markets

SPEECH / VOICE: used in all kinds of spoken interactions between people and machines.

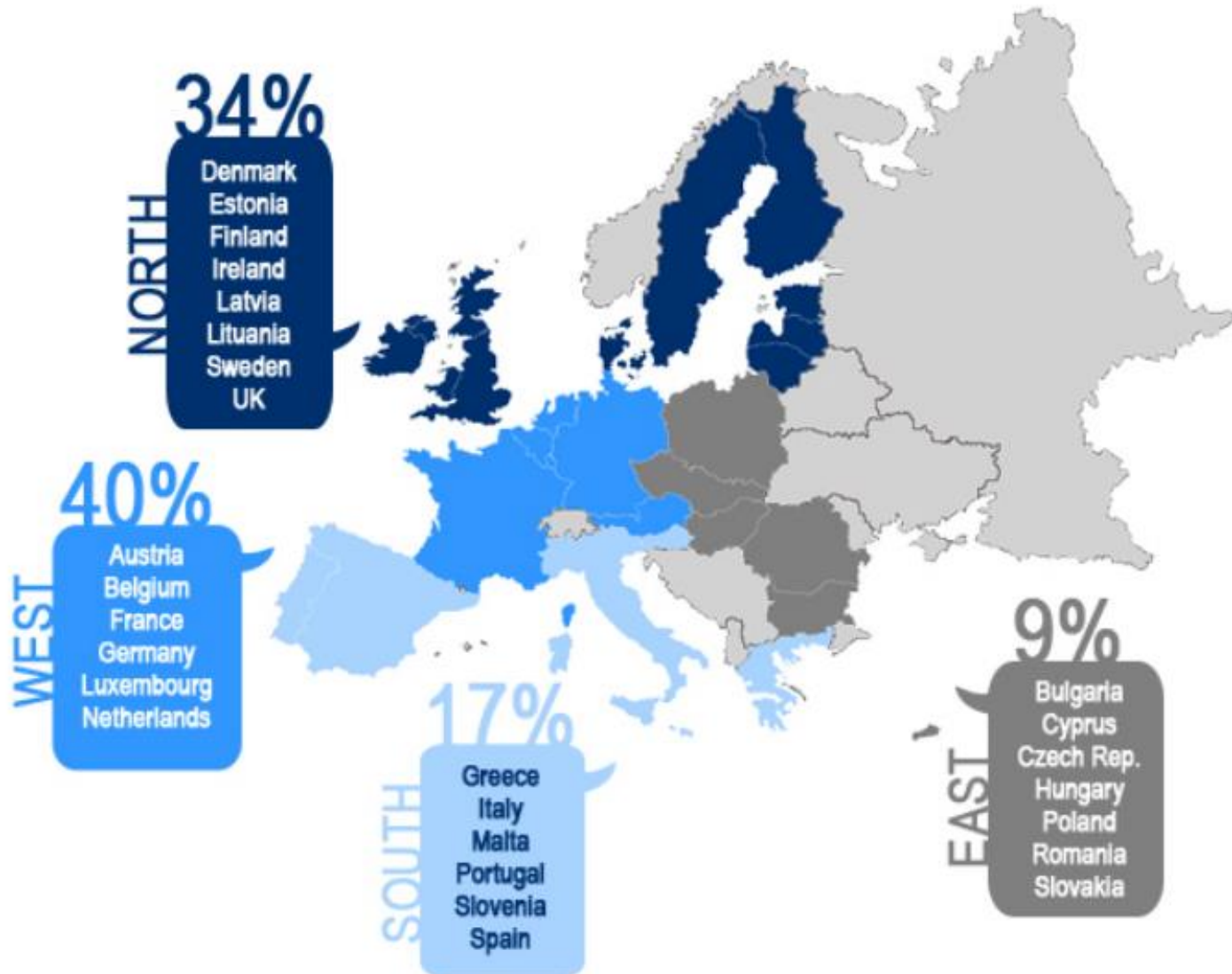


3 Strategic Technology Markets

TRANSLATION: to ensure that we can automatically access and understand knowledge and information in any language.

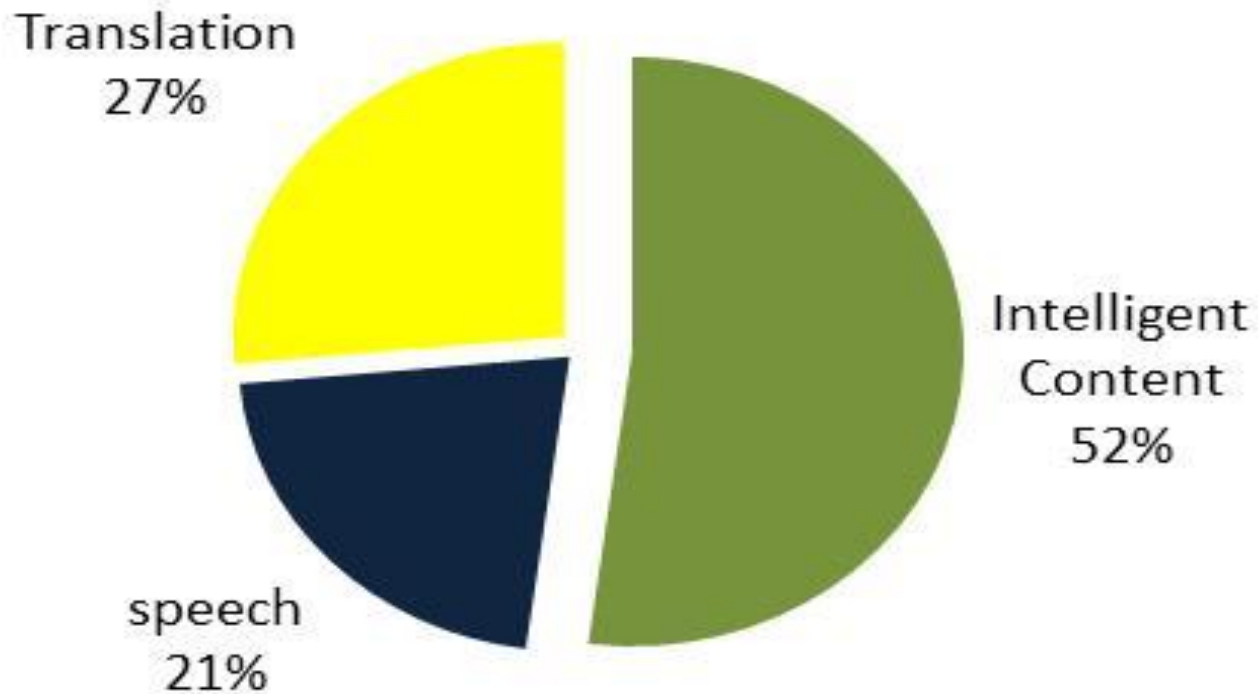


Where are LT companies located?

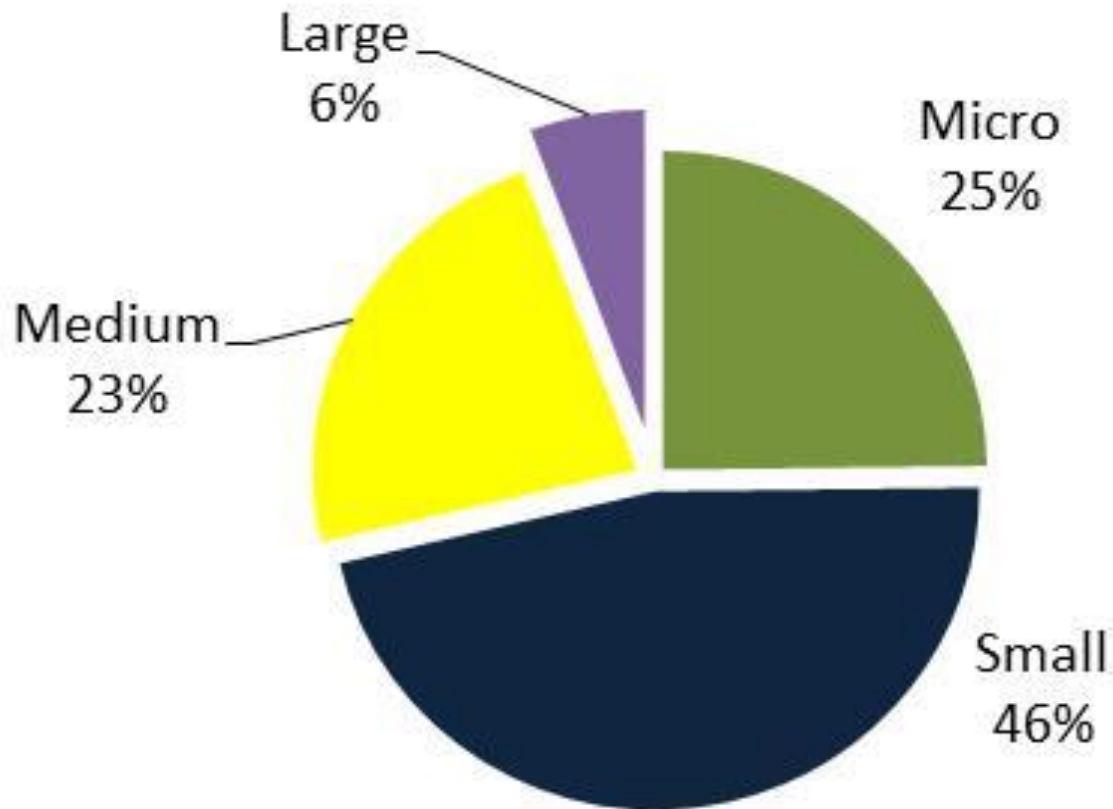


~ 435 companies in Europe

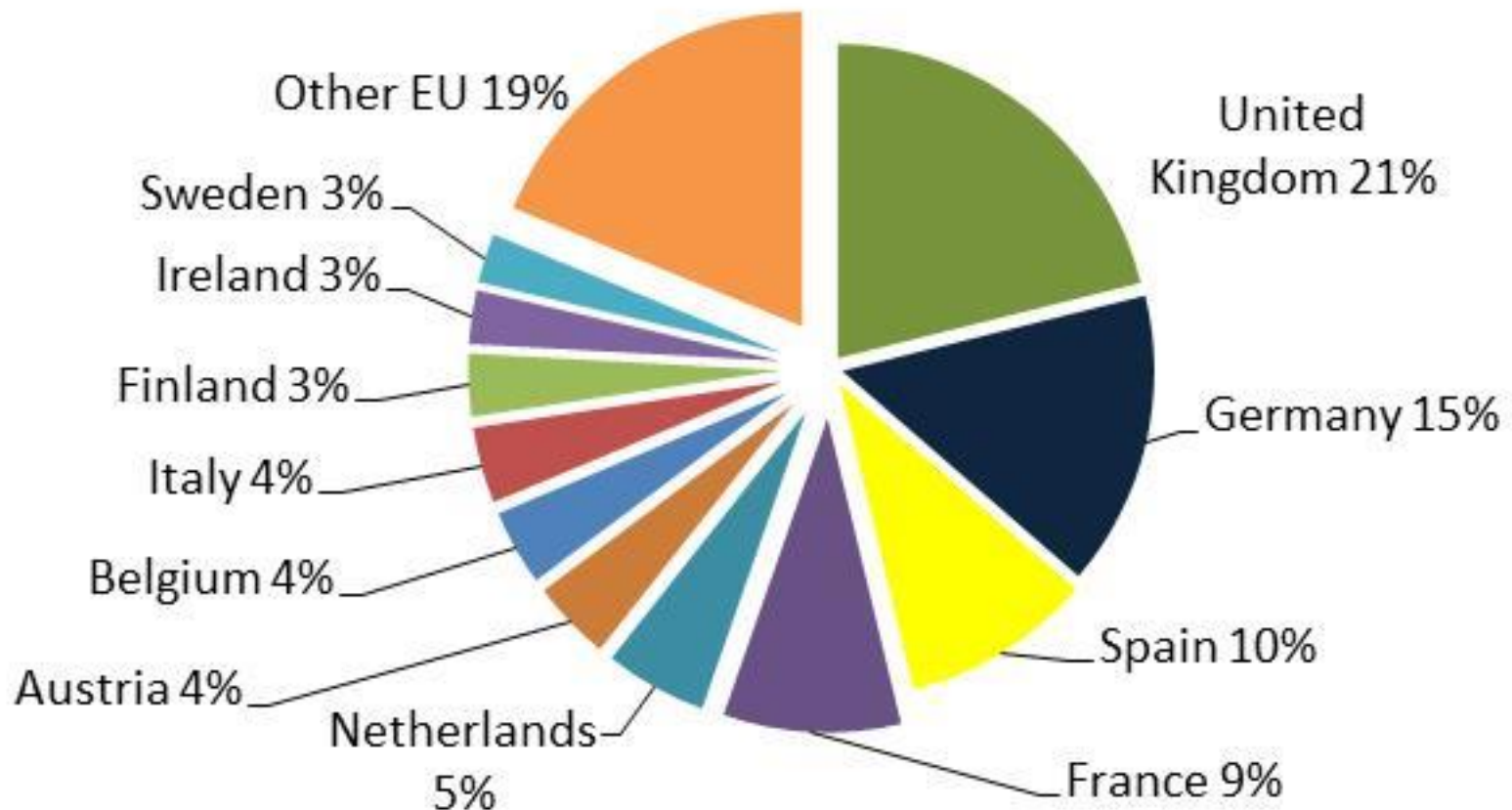
LT vendors by LT Segment



LT vendors by company size

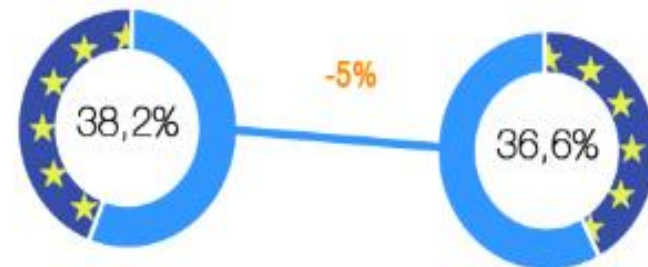
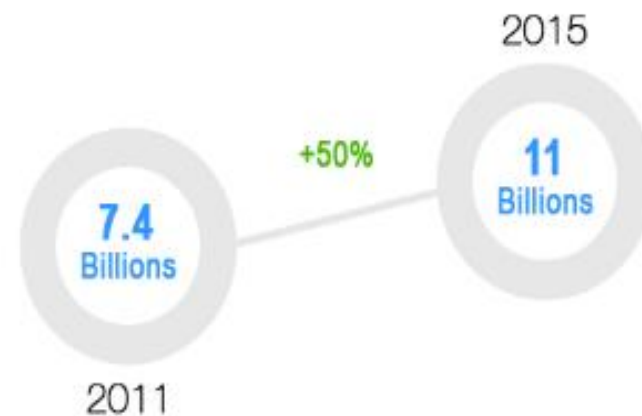
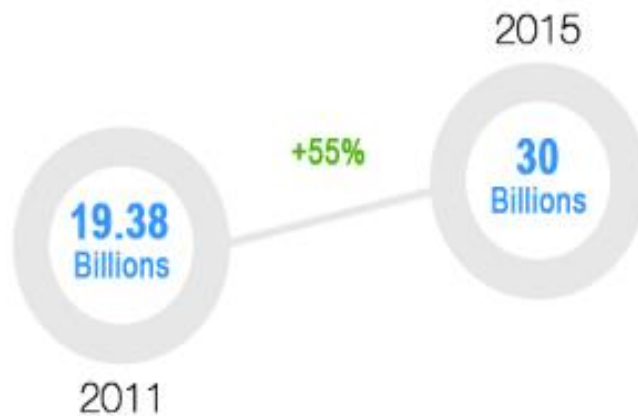


LT vendors by EU country



European LT Industry

Value of the Global Market for Language Technology (LT) Europe's Share of the LT Market



If Europe does not invest in Language Technologies it risks losing shares of the Digital Single Market.

Language Technology

is the Drill
that extracts

the meaning
of Big Data!





The LT Innovation Manifesto

The LT-Innovate Innovation Manifesto



DOWNLOAD

THE LT-INNOVATE
INNOVATION
MANIFESTO

www.lt-innovate.eu/manifesto



@LTInnovate
#LTi2014



A person is seen from behind, sitting in a small boat on a calm lake. The sun is setting in the distance, between two mountain ranges, creating a bright glow that reflects perfectly on the water's surface. The sky and water are a deep blue color. The word "VISION" is written in white, bold, capital letters on the left side of the image.

VISION



COLLABORATION

VALUE-CHAIN





DEMAND

GO-TO-MARKET



TALENT



GROWTH



More specifically...



- Put the industry on the map! **Envision** ourselves as ONE industry. Consolidate LT as one software category. Make sure that the LT market is recognised by analysts. Get Europe to put its money where its mouth is.
- Against global competition, we can either outcompete each other... into oblivion or overcome a fragmented market through **collaboration**.
- Create a network of economic advantage with meaningful articulations up and down the **value-chain**.
- Explore / understand the needs of **demand** markets and supply comprehensive solutions addressing e.g. business process optimisation and cost cutting concerns.

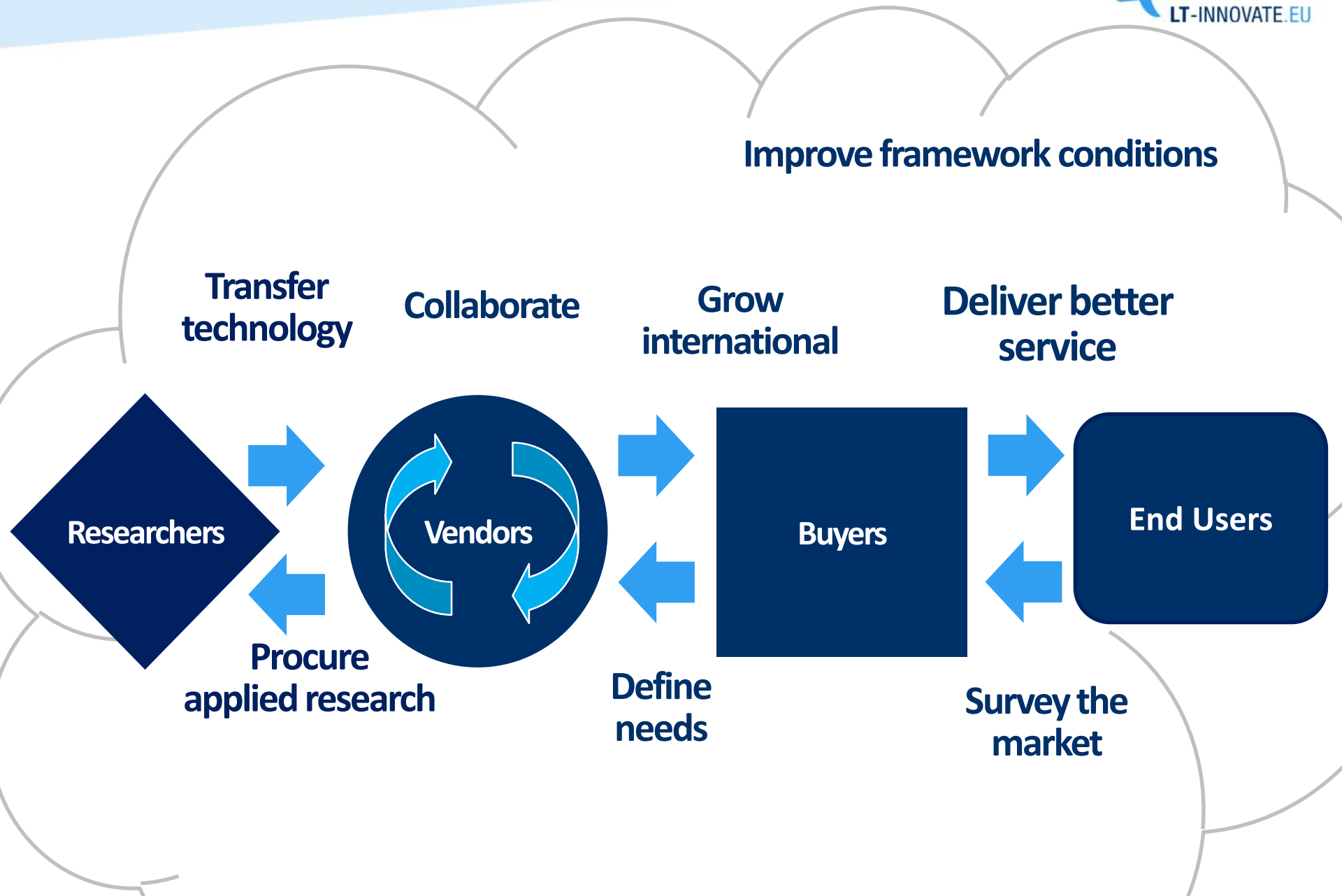
...and...

- **Go-to-market** targeting specific verticals and become specialised, world-class solution providers.
- Identify new knowledge, skills & competences needed for specific role profiles in the industry and engage with training organisations to develop HR **talent**.
- Help companies grow, Europeanise, internationalise, globalise. Facilitate the creation of European groups of companies. Get politicians and financiers to supply adequate funding mechanisms for **growth** companies.
- Build the European Language Cloud as a game changer, basic language resource **sharing** infrastructure, solution showcase and marketplace for language-neutral data/content.



Delivering against the Vision

INNOVATION ACCELERATION



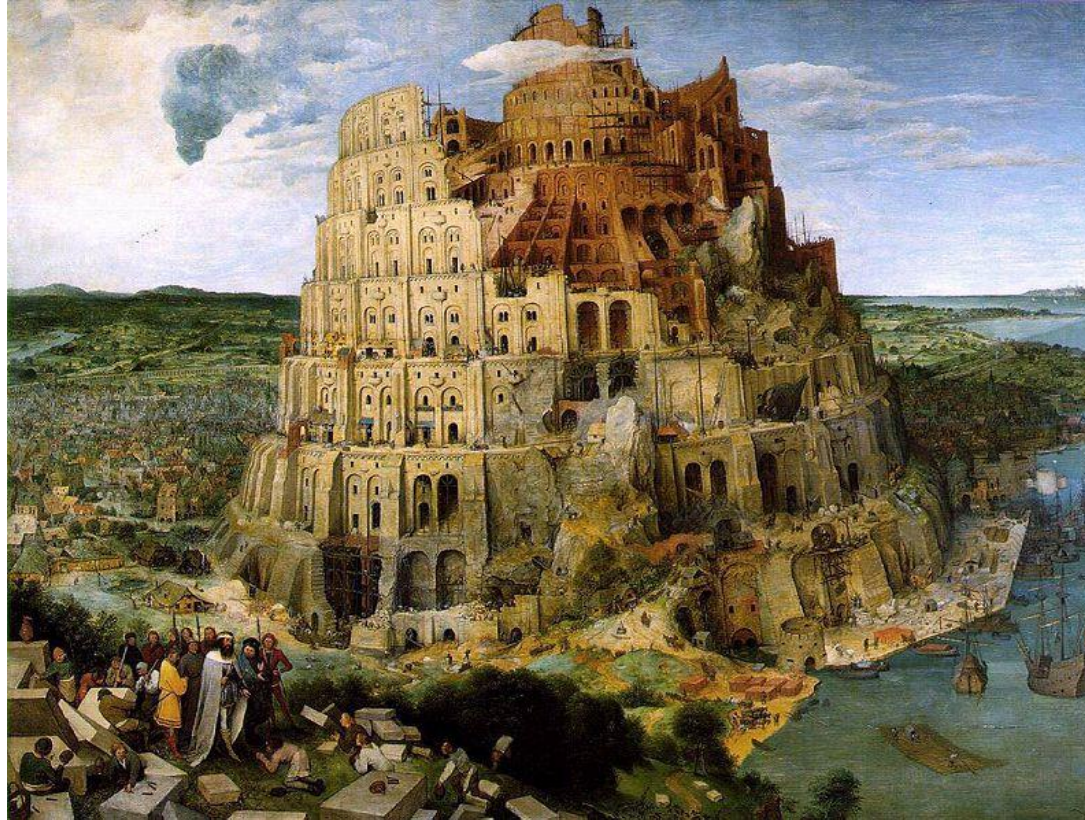
- Objective: work towards a [European Language Cloud](#), a basic Open Infrastructure pooling language resources with easy to implement APIs.
- LT-Innovate plans to pursue this objective by:
 - Inventorying and crowd rating existing language resources;
 - Organising co-operative projects to develop common language resources for the Cloud (enticing resource owners to pool them and fill in the gaps);
 - Building generic services/middleware and missing language resources;
 - Promoting common standards and open-source resources and software;
 - Forging strong partnerships with large language technology buyers, telecommunication operators and content/data owners in vertical markets.



Translation: Needs and Expectations

How far away are we from the Language-neutral Digital Single Market for Content?

Translation: the Opportunity



A language-neutral digital single market for the 1.3bn speakers of European languages!

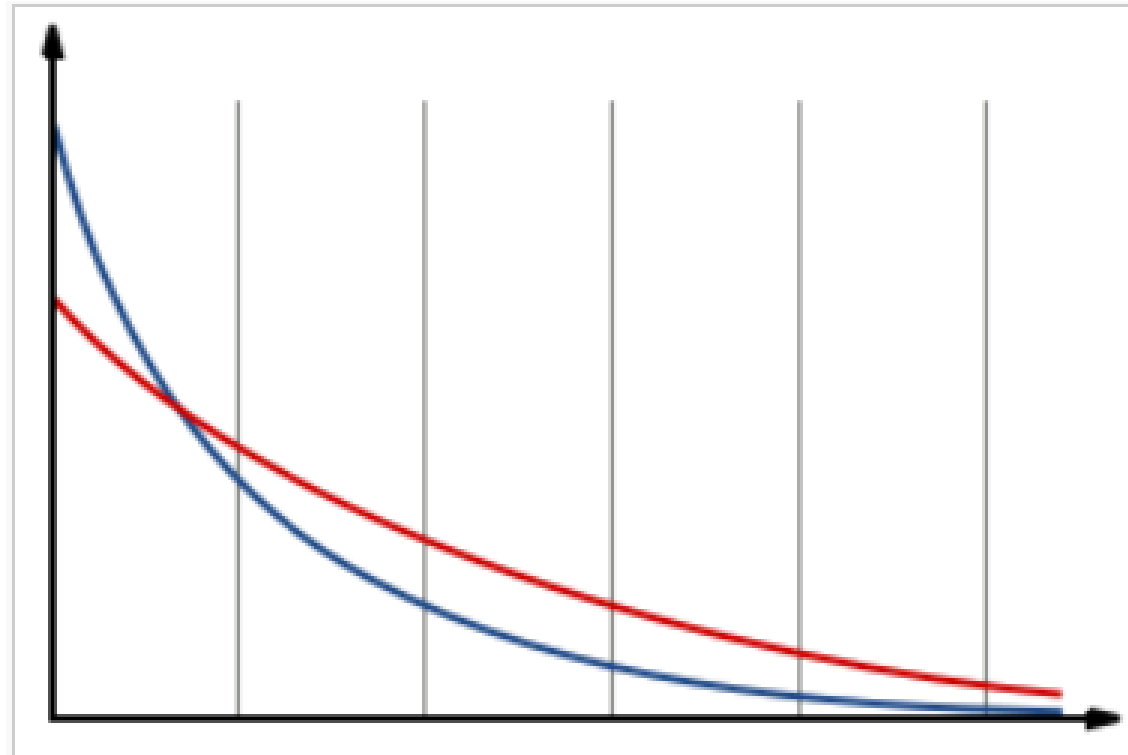
Questions for Discussion

- When asked which automated translation tools they like best, 40% of European translation agencies said "I do not like any of them"! Another 26% had no opinion, and 15% say they like Google Translate. How can we change this?
- How can the Multilingual Service Infrastructure the EC is developing through CEF be deployed for the benefit of all Europeans, including the language industry?
- Open source vs. proprietary MT platforms? White box? Why is MOSES-based technology not (yet) THE de facto standard?

- In Europe, certain sectors and for certain services, large firms and administrations are prepared to pay for high-quality translations. On the other hand, small businesses and administrations in which multilingual exchange is not part of the core activity tend to see professional translation as a heavy expense that will reduce an SME's profits on small contracts. These organizations prefer to rely on their employees' linguistic skills or on automatic translation.
- Is there a long tail in translation?

- The term *long tail* has gained popularity in recent times as describing the retailing strategy of selling a large number of unique items with relatively small quantities sold of each—usually in addition to selling fewer popular items in large quantities. The long tail was popularized by [Chris Anderson](#) in an October 2004 [Wired](#) magazine article, in which he mentioned [Amazon.com](#), [Apple](#) and [Yahoo!](#) as examples of businesses applying this strategy.[\[4\]](#)[\[5\]](#) Anderson elaborated the concept in his book [The Long Tail: Why the Future of Business Is Selling Less of More](#).

Long tail: books



The tail becomes bigger and longer in new markets (depicted in red). In other words, whereas traditional retailers have focused on the area to the left of the chart, online bookstores derive more sales from the area to the right.

- Distributed crowd-sourced translation?
- Pooled sector-specific translation memories?

LET'S TEAM UP!



JOIN US @ LT-ACCELERATE!



Brussels, 4-5 December 2013 - www.lt-accelerate.com

A conference designed to help businesses, researchers and public administrations discover business value via Language Technology.



MANY THANKS!

Philippe Wacker

Secretary General

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