

## PRESS PACK SUMMARY

- Language Technologies are Key Enablers of Economic & Social Progress
- **Language Technologies win recognition as an indispensable building block of the European Digital Single Market** [*Press Release*]
- **2nd LT-Innovate Summit 2013** [*Programme*]
- Language Technology is the Drill that extracts the meaning of Big Data! [*Postcard*]
- **Contacts** page with the social networks, emails and websites links
- The LT-Innovate Industry Vision Statement
- LT 2013 Status and Potential of the European Language Technology Markets [*Executive Summary and Keys extracts*]
- LT 2013 A comprehensive panorama of a key industry for Europe's digital future [*Postcard*]
- Facts & Figures about Language Technology in Europe [*Infographics*]

### Join LT innovate!

Full Forum membership is open to all European LT vendors. Associate membership is open to all interested parties. Register at [www.LT-Innovate.eu](http://www.LT-Innovate.eu) and shape the future of your industry and your company.

Worldwide demand growth for language services:  
**10-13% per year**

**Language Technologies are Key Enablers of Economic & Social Progress**

**82%** of European online shops are published in a single language; **11%** offer two languages and only **2%** publish in five or more languages.

**One million European SMEs** may be losing trade as a result of lack of language competences and resources.

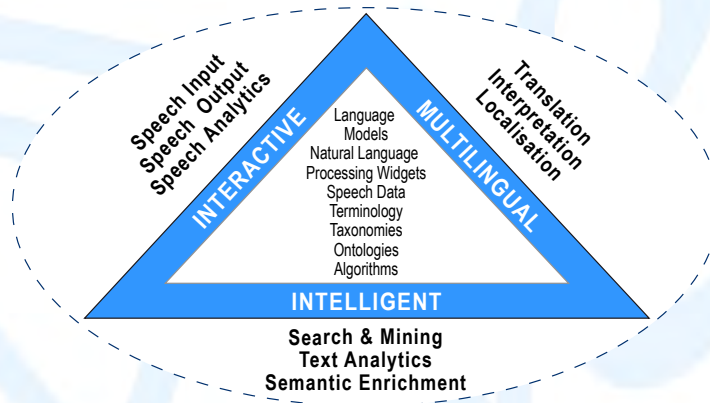
The worldwide market for:

- translation products and services: **15B€**
- speech products and services: **15B€**
- analytics and business intelligence software: **8B€**

Cost of language services (translation and interpretation) to the European Institutions: nearly **1.1B€ per year**

**LT-Innovate objectives:**

- ▶ to promote Language Technology as a key enabling technology for Europe's economy and society
- ▶ to unify Europe's Language Technology industry for increased competitiveness in the global market place
- ▶ to facilitate technology transfer from research to market
- ▶ to articulate the sector's collective interests vis-à-vis buyers, researchers, investors and policy makers



**Join us!**

- ▶ Full Forum membership is open to all European LT vendors. Associate membership is open to all interested parties.
- ▶ Register at [www.LT-Innovate.eu](http://www.LT-Innovate.eu) and get involved in the shaping of the future of your industry and your company.



## Language Technologies win recognition as an indispensable building block of the European Digital Single Market

LT-Innovate, the Forum for Europe's Language Technology Industry, organises the **2ND LT-INNOVATE SUMMIT** on **26 - 27 June 2013** at the EU Thon Hotel in Brussels (75, rue de la Loi).

The yearly LT-Innovate Summit aims at gathering Language Technology suppliers, buyers, researchers, investors and policy makers.

Jochen Hummel, Chairman of LT-Innovate and CEO of ESteam, declares himself pleased with progress made since last year's Summit:

*«Last year, we had to remind European leaders that language technologies are of strategic importance in a multilingual continent. There is no way we can become leaders in the 'knowledge society' if we do not master the very technologies that are at the heart of searching, analysing, enriching, translating and communicating seamlessly the zettabytes of data that are currently floating through the global networks. This year, we can proudly state that the European Commission listened to the LT community and included language technologies as a core component of the next generation of infrastructures into which it is planning to invest. Let us face the facts: there will be no European Digital Single Market without Language Technologies! If there is one core technology for Europe to invest in as a matter of absolute priority - privately and publicly - it is Language Technology! ».*

The Summit will be attended by more than 200 Language Technology stakeholders. Philippe Wacker, LT-Innovate Secretary General explains:

*« Around LTI's core membership of LT vendor companies, represented by more than 50 company CEOs, we have assembled representatives of organisations that have important language technology needs, from such diverse areas as publishing, tourism, healthcare, petrochemicals, automotive, IT software, European governmental bodies, etc. We are putting emphasis on developing a dialogue with these big LT users to ascertain their needs and to put our members in a position to respond to language-related challenges across many industrial, cultural and societal sectors of activity ».*

The Summit will culminate in the celebration of the **LT-Innovate 2013 Award Winners**, the most innovative LT companies of the year.

## Language Technologies win recognition as an indispensable building block of the European Digital Single Market

So far, 30 companies have been shortlisted for the Award. They will present their products and solutions at the Summit and a jury of experts will designate the 12 winners on 27 June.

The 30 nominees are:

*Actonomy,*  
*Cedat 85,*  
*ConceptStrings,*  
*Crystal Semantics,*  
*DAEDALUS,*  
*Dictanova,*  
*digitAAL,*  
*iFinger,*  
*Imooty.eu,*  
*Inbenta,*  
*Joyrite,*

*K Dictionaries,*  
*Langapp,*  
*Lexical Computing,*  
*MarkTheGlobe,*  
*Morena inzenjering,*  
*MorphoLogic,*  
*Palex Group,*  
*Pythagoria,*  
*Servelots,*  
*Skawa Innovation,*  
*Syllabs,*

*SYSTRAN,*  
*Textcase,*  
*Traborma Informatics*  
*Technologies R&D*  
*Treparel,*  
*Verpura,*  
*Viclone,*  
*Videodossier, S.L.,*  
*Wordbee*

For more information, please contact:

Website: [www.lt-innovate.eu](http://www.lt-innovate.eu)

**Philippe Wacker**  
Secretary General  
[phw@lt-innovate.eu](mailto:phw@lt-innovate.eu)  
+32 2 219 0305

**Myrna Rodríguez-Hausséguy**  
Communications Coordinator  
[mrh@lt-innovate.eu](mailto:mrh@lt-innovate.eu)

**LT-Innovate Award Contacts:**  
**Adeline Kloosterman** - [akl@lt-innovate.eu](mailto:akl@lt-innovate.eu)  
**Mareike Thomas** - [mth@lt-innovate.eu](mailto:mth@lt-innovate.eu)

 Hashtag: **#LTi2013**  
[www.twitter.com/ltinnovate](http://www.twitter.com/ltinnovate)  
[www.twitter.com/langtechnews](http://www.twitter.com/langtechnews)

 [www.ltinnovate.blogspot.com](http://www.ltinnovate.blogspot.com)

 [www.linkedin.com/groups/ltinnovate-4310055](http://www.linkedin.com/groups/ltinnovate-4310055)

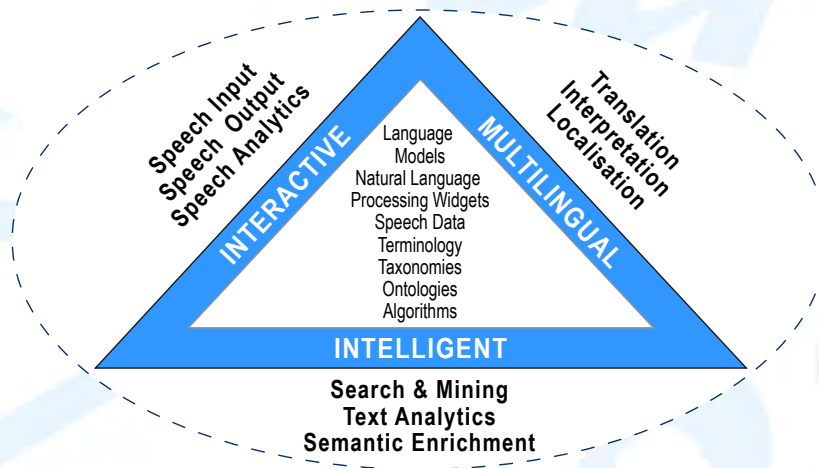
 [www.youtube.com/ltinnovate](http://www.youtube.com/ltinnovate)

## Language Technologies win recognition as an indispensable building block of the European Digital Single Market

### Background information

What are Language Technologies (LT)?

LT is the branch of information technology that allows data and content to be multilingual, intelligent and interactive. It can roughly be split into three segments as shown below:



### LT Innovate – The Forum of Europe's Language Technology Industry

LT-Innovate represents companies, mostly SMEs, involved in developing products using intelligent content, speech and translation technologies. LT-Innovate was founded in January 2012. As of June 2013, it gathers 160 LT suppliers in 25 countries, as well as several dozens of other LT stakeholders. The European Language Technology industry generated an aggregate turnover of 19.3 bn € in 2011. LT is a very dynamic industry, with a yearly growth rate in excess of 10%.

LT-Innovate provides is a collaborative forum through which members can:

- Stay informed about news, views and developments affecting the industry;
- Gain access to market intelligence;
- Engage in discussions with relevant partners;
- Pursue opportunities and solve problems through collaborative action;
- Provide collective feedback to policy makers at national and European level to shape future policies and programmes.

# THE LT-INNOVATE 2013 SUMMIT PROGRAMME

## TOWARDS THE MULTILINGUAL DIGITAL SINGLE MARKET

Thon Hotel EU Rue de la Loi/Wetstraat 75, B-1040 Brussels +32 2 204 3911

### Wednesday 26 June 2013

(for LTi Full Members and by Invitation Only)

09:00

Registration

**LT-Innovate Annual General Meeting**

[Room: The Netherlands I & II]

**Moderation:** Philippe Wacker, Secretary General, LT-Innovate

09:30

Short Presentations of Main Achievements in 2012-13  
Business Model  
Work Programme for 2014  
Confirmation of the Board of Directors  
Approval of Officers

13:00

Walking Lunch [Restaurant The Twelve]

**LT CEO SUMMIT - Towards Mature Language Technology Markets?**

[Room: Belgium Balroom]

**Moderation:** Jochen Hummel, Chairman & Philippe Wacker, Secretary General, LT-Innovate

Presentation of "LT2013: Status and Potential of the European LT Markets"  
by Rafael Achaerandio, IDC

14:00

**Themes 1 & 2: Overcoming Market Fragmentation by Pooling Assets and Resources;  
Developing Products of European Scale**

**Discussants:**

Casper Davies, Bitext / Jose Gonzalez, DAEDALUS/ Stefan Geißler, TEMIS / Knut Haga, iFinger / Istvan Lengyel,  
Kilgray / Alexander Rylov, ABBYY / Paul Welham, CereProc / Jakub Zavrel, Textkernel

**Theme 3: Consolidating Deep Expertise on Key Buyer Markets**

**Challengers:**

Ute Ehrlich, Daimler / Helmut Fluhrer, Brainmate / Laurie Miller, Bayer MaterialScience/ Carlos Romero Dexeus, Segittur

17:00

Drinks and Networking [Bar]

19:30

Dinner [Room: France]

# THE LT-INNOVATE 2013 SUMMIT PROGRAMME

TOWARDS THE MULTILINGUAL DIGITAL SINGLE MARKET

## Thursday 27 June 2013

Open Conference Programme

09:00

Registration

### Plenary Opening Panel

[Room: Belgium Ballroom]

SCENARIOS FOR THE MULTILINGUAL DIGITAL SINGLE MARKET

09:30

**Moderator:** Jochen Hummel, CEO, ESTeam

**Keynotes:** Roberto Viola, Deputy Director General, European Commission, DG Connect

**Panelists:**

Eric Brégand, CEO, TEMIS / Rahzeb Choudhury, Operations Director, TAUS  
Steve Renals, Professor of Speech Technology, School of Informatics; Director, Institute of Language, Cognition and Computation, Edinburgh University / Ralf Hermann, Intranet/Internet Solutions, Bayer MaterialScience / Ian Saunders, Co-founder & CEO, Crystal Semantics

11:00

### Update on European Commission Activities Relevant to LT

[Belgium Ballroom]

Marta Nagy-Rothengass, Head of Unit, European Commission, DG Connect

11:15

Coffee and Networking [Coffee Corner]

11:30

### DRIVING INNOVATION IN LT (I)

*Supply Meets Demand*

[Room: Belgium Ballroom]

**Chair:**

Adriane Rinsche, LTC

**Moderation:**

Andrew Joscelyne, LangTechNews

**Panellists:**

David Milward, Linguamatics  
Carlos Romero Dexeus, Segitur  
Pawel Walentynowicz, Transenter  
Paul Welham, CereProc

### SHOWCASE PRESENTATION

Session I

[Room: Netherlands 1]

**Moderator:**

William Stevens, Europe Unlimited

**Expert Jury:**

Bruno D'hulster, BeNovate  
Artur Gulpe, goodpoints.fellows  
Arkadiusz Hajduk, SpeedUp  
Kim Harris, text&form  
Mads Ingemann Blücher, Amesto  
Heike Klaum-Frenzel, SAM Xlation  
Gerrit Jan van't Veen, Dutch Coast

**Presenters:**

Actonomy / MarkTheGlobe /  
Morena inzenjering / MorphoLogic /  
Pythagoria / digitAAL

### EU PROJECT PRESENTATION

Session

[Room: Germany]

**Moderator:**

Margaretha Mazura, EMF

**Presenters:**

Asunción Gómez Pérez, LIDER  
Aris Karanikas, SpeDial  
Dave Lewis, Falcon  
Alexandros Potamianos, SpeDial  
Achim Rettinger, xLIME  
Stefanos Vrochidis, Multisensor

# THE LT-INNOVATE 2013 SUMMIT PROGRAMME

TOWARDS THE MULTILINGUAL DIGITAL SINGLE MARKET

## Thursday 27 June 2013

Open Conference Programme

13:00

Walking Lunch [Restaurant The Twelve]

DRIVING INNOVATION IN LT (II)  
*The European Language Cloud*  
[Room: Belgium Ballroom]

**Chair:**

Jochen Hummel, ESTeam

**Moderation:**

Ruben Riestra, INMARK

**Standardisation in LT:**

Serge Gladkoff, Logrus International  
Andrzej Zydron, XTM International

**Panellists:**

Casper Davies, Bitext  
Stefan Geißler, TEMIS  
Alexander Rylov, ABBYY  
Páraic Sheridan, CNGL-Ireland

SHOWCASE PRESENTATION  
*Session II*  
[Room: Netherlands 1]

**Moderator:**

Nils-Olof Forsgren, Uminova  
Innovation

**Expert Jury:**

Mike Beunder, Ehrhardt Leus &  
Associates  
Christian Dugast, Tech2Biz  
Ozgur Durmaz, Technoscope  
Dietrich Klakow, Saarland University  
Aleksandar Tasev, Balkan Unlimited  
Elena Tsiorkova, SIRRIS  
Gonzalo Tradacete, Faraday  
Venture Partners  
Marc Kobylinski, Allyum

**Presenters:**

Crystal Semantics / K Dictionaries  
/ Langapp / Lexical Computing /  
Textcase / Syllabs

SHOWCASE PRESENTATION  
*Session III*  
[Room: Germany]

**Moderator:**

Andrew Joscelyne, LangTechNews

**Expert Jury:**

George Dimitriou, SEPVE  
Gregor Heinrich, semafora systems  
Andreea Porcelli, Continental  
Advisors  
Arturo Quintero, Moravia  
Benoît Rivollet, Tech2Market  
Khalil Sima'an, University of  
Amsterdam  
Siegfried Verstappen, Invest Hong  
Kong

**Presenters:**

Palex Group / Skawa Innovation /  
Wordbee / Inbenta / DAEDALUS /  
Viclone

14:30

15:45

Coffee and Networking [Coffee Corner]

# THE LT-INNOVATE 2013 SUMMIT PROGRAMME

TOWARDS THE MULTILINGUAL DIGITAL SINGLE MARKET

## Thursday 27 June 2013

Open Conference Programme

### DRIVING INNOVATION IN LT (III)

*LT Innovation Scenarios*  
[Room: Belgium Ballroom]

**Chair:**

Serge Gladkoff, Logrus International

**Moderation:**

Ruben Riestra, INMARK

**Panellists:**

Jose Gonzalez, DAEDALUS  
Claude de Loupy, Syllabs  
Jordi Torras, Inbenta  
Andrejs Vasiljevs, Tilde

16:15

### SHOWCASE PRESENTATION

*Session IV*  
[Room: Netherlands 1]

**Moderator:**

Luc Francis Jacobs, Nixxis

**Expert Jury:**

Florence Beaujard, Airbus  
Dirk Creado, Prepro NV  
Ishan Elgin, Girisim Fabikasi  
Marc Van Gestel, Flanders  
Investment & Trade  
Ole Niss, NissCo  
Josu Waliño Pizzaro, Elhuyar  
Fundazioa

**Presenters:**

Cedat85 / Servalots / iFinger /  
Imooty.eu / Systran / Traborma  
Informatics Technologies R & D  
Industry Co.

### SHOWCASE PRESENTATION

*Session V*  
[Room: Germany]

**Moderator:**

Leo Exter, Westartup

**Expert Jury:**

Vicky Van Asbroeck, Cartagena  
Capital  
Antonio Balvet, University of Lille  
Patrick Crasson, BeNovate  
Bartek Gola, SpeedUp  
Matthias Heyn, TRADOS- SDL  
Group  
Christian Kissig, Oracle  
Tom Leyden, DataDirect Networks  
Bart Van Lysebeth, Nyenrode  
Business Universiteit

**Presenters:**

ConceptStrings / Dictanova / Joyrite  
/ Verpura / Trepapel / Videodossier

### Plenary Closing Session

[Room: Belgium Ballroom]

17:30

**Jochen Hummel, Chairman & Philippe Wacker, Secretary General, LT-Innovate**

18:30

Drinks and Networking [Bar]

### LT-Innovate Award Ceremony & Gala Dinner

[Room: France]

19:15

Presented under the auspices of Amelia Andersdotter, Member of the European Parliament

# Language Technology

is the Drill  
that extracts

the meaning  
of Big Data!



**Language Technology extracts Value  
from unstructured data and drives Innovation**

- ▶ The intelligent economy produces a constant stream of data that is being monitored and analysed.
- ▶ The ability to manage and process the tsunami of data across the world's languages is one of the biggest challenges in the new ICT ecosystem, and one for which LT is a critical enabling technology.
- ▶ When we need to know the meaning of Big Data, Language Technology is essential.

**Language Technology encompasses the many ways  
to capture and exploit the Intelligence embedded in Data**



@LTInnovate - @LangTechNews



www.lt-innovate.eu/



## CONTACTS

### Press Contacts:

Philippe WACKER  
Secretary General - phw@lt-innovate.eu

Myrna RODRÍGUEZ-HAUSSÉGUY  
Communication Coordinator - mrh@lt-innovate.eu

### Award Contacts:

Adeline KLOOSTERMAN  
akl@lt-innovate.eu

Mareike THOMAS  
mth@lt-innovate.eu

## FOLLOW US:

[www.lt-innovate.eu/summit](http://www.lt-innovate.eu/summit)  
[summit@lt-innovate.eu](mailto:summit@lt-innovate.eu)



Hashtag: **#LTi2013**  
[www.twitter.com/ltinnovate](http://www.twitter.com/ltinnovate)  
[www.twitter.com/langtechnews](http://www.twitter.com/langtechnews)



[www.ltinnovate.blogspot.com](http://www.ltinnovate.blogspot.com)



[www.linkedin.com/groups/  
ltinnovate-4310055](http://www.linkedin.com/groups/ltinnovate-4310055)



[www.youtube.com/ltinnovate](http://www.youtube.com/ltinnovate)

### Join LT innovate!

Full Forum membership is open to all European LT vendors. Associate membership is open to all interested parties. Register at [www.LT-Innovate.eu](http://www.LT-Innovate.eu) and shape the future of your industry and your company.

## THE LT-INNOVATE INDUSTRY VISION STATEMENT

### **A Major Effort to Deploy Language Technologies is Necessary to Ensure Europe's Global Market Position in eContent and to Secure the Digital Single Market.**

Top executives of European Language Technology companies, who joined forces in LT-Innovate, are calling for a major effort to deploy language technologies as a key building block of the Digital Single Market and enabler of a language-neutral eContent economy.

On 6 December 2012, LT-Innovate released a Vision Statement entitled "Language Technologies: Establishing Europe's Global Market Position & Securing the Digital Single Market" through which it hopes to stimulate a broad discussion.

The Discussion Document underlines that "mastering human language is the next big opportunity in Information and Communication Technologies (ICT) and Language Technology (LT) is a key technology of the future. Europe (a multilingual continent with more than 63 languages) should step up its investment in LT as strategic key enabling technologies that will determine the continent's economic competitiveness as well as its cultural integrity.

In one of its main proposals, the Discussion Document calls for a "European Language Cloud" (ELC) which would considerably bring down the costs of cross-border products and services and allow all Europeans to seamlessly interact with the 1 billion+ market of speakers of European languages. The ELC would constitute a major opportunity and boost for the European economy and society, creating many new jobs. Such a platform should also support the languages of Europe's major trading partners, making European companies and citizens fittest for the global markets.

Jochen Hummel, LT-Innovate Chairman, comments: "There is no lack of innovation in Europe. The main stumbling block is that Europe's SMEs do not grow beyond their national or regional linguistic islands to address European and global markets. European SMEs must get access to a market of continent-wide dimensions, through European-scale projects backed by European-scale funding. The European Commission's Horizon 2020 Programme offers a major opportunity to boost innovation and regain competitiveness; but European Programmes need to become results-driven and should put innovators and job creators, in other words SMEs, into the driving seat!"

The Discussion Document is available on the LT-Innovate website.  
Flash the QR-code to download it!



# LT2013: STATUS AND POTENTIAL OF THE EUROPEAN LANGUAGE TECHNOLOGY MARKETS

## EXECUTIVE SUMMARY

This LT-Innovate report provides a comprehensive survey of the state of the Language Technology (LT) market in Europe today and projections for the next five years. It is divided into six parts, covering global trends in the ICT ecosystem, an analysis of specific trends in the LT industry, an exploration of innovation options for European LT companies, and a detailed account of the three strategic technology segments of speech interaction, multilingual communication and translation, and intelligent content that make up the LT market.

Mobile communications, cloud service models and social media are transforming the way citizens, companies and public administrations act in the digital world. This report identifies three deep trends driving next generation ICT that will open up significant opportunities for LT:

**Unified Communication:** cross-platform, multimodal and multilingual. Mobile connectivity and service unification across devices and platforms will offer business and consumer users seamless communications.

**Unified Information Access:** in any language and across languages. This will remove barriers to content and enable integrated messaging, conferencing, collaboration, content - and data-sharing based on intelligent content and applications, multilingual and interactive systems and technologies.

**Unified User Experience,** based on natural interaction with machines and processes, in any language.

This will remove barriers to the access, use and understanding of information from large volumes of unstructured, semi-structured, and structured data.

LT is the critical enabling technology for each of these fundamental trends and stands to benefit from the emerging interconnections between interaction (speech), information processing (intelligent content) and automatic translation in a multilingual connected digital space. It is therefore vital for the European LT industry to embrace and foster the opportunities the rapidly evolving ICT eco-system offers and to pursue a dynamic innovation agenda ahead of its competitors globally.

LT-Innovate has developed a market model to estimate the size of LT market in terms of sales and services. The worldwide LT market is worth around €19.3B today and should grow to nearly €30B by 2015. The European speech technology market is growing by 9.7%; and should grow to €8.6B by 2015. The intelligent content market is set to grow to €6.2B. The translation technology market is worth some €8.6B and should grow to €14.9B. The growth rates in the "Rest of the World (ROW)" markets should be significantly higher than in Europe and the Americas as these emerging markets mature. The translation technology segment will continue to dominate the European LT market.

In terms of market participants, there are some 500 European companies actively developing or integrating LT, most of them still small companies and all too often, focus on niches in their national (language) markets. However, the European LT industry is

gradually moving LT up the value chain into mainstream applications and markets. Furthermore, the gaps in language coverage for speech and content technology, and the potential to create a demand-driven dynamic hold significant potential for growth of the LT industry across Europe.

To facilitate this strategic growth, it is suggested that the pace of development could be accelerated through collaborative innovation bringing together LT companies with their peers and other corporate actors and buyers across the ICT value chain. Various scenarios for this process are explored in the Report.

The final three sections analyse in detail the history, companies and product/service offerings in the key LT segments of speech, translation and intelligent content technology, providing a guide to key players and their role for the three different application areas.

## KEY EXTRACTS

### A new Ecosystem

New open paradigms, language-neutral development platforms and multilingual development resources could foster disruption, particularly in Europe. (p. 5)

The ability to manage and process the tsunami of data across the world's languages is one of the biggest challenges in the new ICT ecosystem, and one for which LT is a critical enabling technology. (p. 6)

LT is baked into the future of ICT in the mobile/social/global world of computing. (p.7)

In the era of semantics – when we need to know the meaning of the data that flows around the digital universe – Language Technology is essential for innovation. (p.8)

Although LT has been a commercial market for many years, only recently have technological conditions made it possible to exploit LT on a large scale. (p.9)

### Markets for Language Technology

The fastest growth is in non-European languages, though Spanish and Portuguese gain significance because of Latin American markets. Aside from English, Spanish and Portuguese, only five other EU languages (German, French, Italian, Polish and Dutch), out of 60 or more spoken in the Union, are published on more than 1% of the top million sites. (p. 10)

While the potential is for a single European digital market with 500+ million customers, the reality is a series of fragmented linguistic markets, none bigger than possibly 70/80 million customers, most much smaller. (p. 11)

At present no company or website could be genuinely global using the localisation techniques currently at our disposal. Only with large-scale automation will the limited multilinguality of the web be transformed into a genuinely globally accessible medium. (p. 11)

Where language is the very stuff of our digital system – customer interactions, employee conversations, technical and scientific knowledge, cultural and social objects of all kinds – the era of the Lingua Franca is over. Interacting across the many languages of the digital world is no longer optional. (p. 12)

Europe's share of the worldwide market will increase slightly to 38% over the five year period. However, that share is significantly lower (24% in 2015) for the software portion of the market... Factors that could change this include:

Faster and more extensive deployment of content applications in more European languages, in a coherent framework for all languages;

Development – and integration – of speech components (for recognition, generation and identification/verification) in more European languages, affordably available for European application and solution developers;

Large-scale deployment of open source machine translation in open environments using shared resources;

Large-scale sharing of resources (paid and free) throughout the European industry;

Development of vertical and industry-specific platforms for LT development and deployment, engaging whole industries in cooperative initiatives (analogous to SWIFT in banking) (p. 21)

Collaboration between the industry and data owners will be needed. (p. 22)

Many IT managers are still relatively unaware of the benefits that LT can provide them... Suppliers, LT vendors and IT integrators should work closer and harder to identify killer business cases, increase market awareness and deploy market strategies understanding how economic return affects clients, developing modular/incremental products, and forging cross-industry alliances for to strengthen market channels. (p. 24)

LT-Innovate estimates that there are around 500 companies in Europe either actively developing Language Technology, or embedding its features in their products and services in an innovative way... The industry comprises mostly small companies, concentrated in the western and northern regions of the EU, with a mix of long-established players but also a significant number of new entrants. A quarter of the companies are micro-enterprises with fewer than 10 employees, while only 6% have more than 200 employees; almost the entire industry is composed of SMEs... Over half the industry comprises companies active for more than 10 years, many that remain small. The fact that so many companies fail to scale, even after years in business, is unusual in a technology industry, and indicative of the market context for LT in Europe: local/national companies with expertise in local languages serve local markets with services based on their own languages. This state of affairs is not likely to be sustainable, as cloud-based language-enabled services are launched on a large scale. At present, few European companies are in a position to compete in an ecosystem where access to technology, rather than narrow linguistic expertise, is the driving factor. (p. 25)

## Innovation in the LT Industry

The dynamics of the general software market, and the limits of what is currently possible for niche LT SMEs, strongly suggest that a Digital Language Infrastructure for Europe could both unlock potential for the industry, and help meet the need for pervasive “multilinguality” in Europe's digital economy. The industry itself should define the nature and content of the infrastructure, what features are appropriately shared and open, what should remain in the commercial IP realm. (p. 33)

The review of conditions in the LT industry suggests that collaborative approaches to the market could break through the fragmentation that is evident.(p. 33)

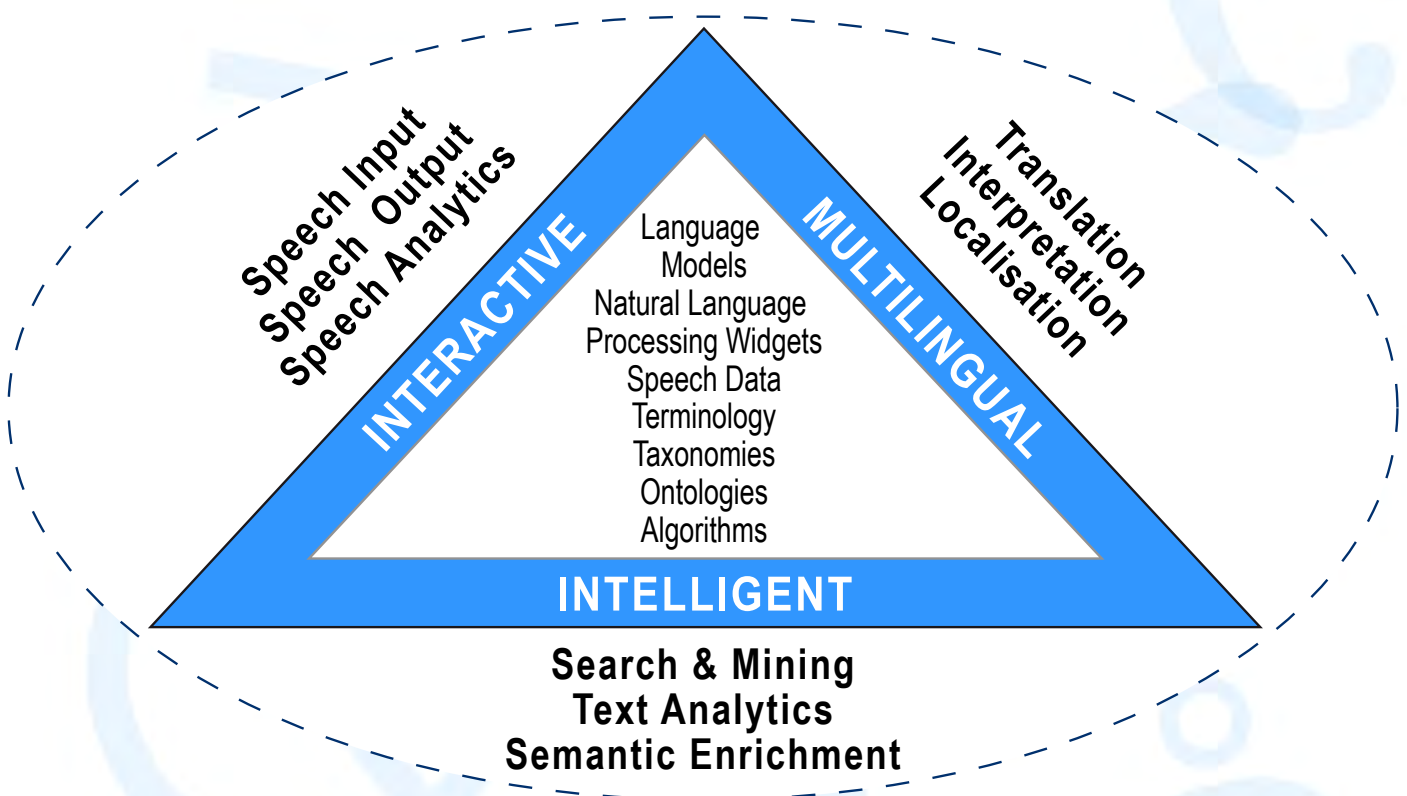
Asymmetric partnering for SMEs is a natural route to developing technologies in specialist areas with steep technical demands (heavy R&D), where domain expertise is key. Peer partnering takes the alternate route of creating new “breakout” categories of products or services through the collaborative combination of complementary technologies... Dominant markets are those where technical depth meets the greatest opportunity. (p. 38)

## Interactive, Multilingual, Intelligent

The speech applications market shows immense potential, and it is expected to grow rapidly in the next few years... The market is mainly driven by the increased demand in the Mobile Devices segment. This segment is witnessing high demand for speech recognition applications because of the increase in the number of regulations on the use of mobile phones while driving. (p. 47)

We can debate whether the translation industry's response to rapid globalisation and growth in content has been the right one. Has the industry made best use of technology to raise its capacity and stay profitable? Or has the content explosion marginalized an industry of artisans? (p. 55)

Intelligent content refers to content that is structurally rich and semantically aware, and is therefore discoverable, reusable, reconfigurable and adaptable and which is not limited to one purpose, technology or output. These technologies rely on underlying techniques and tools such as natural language processing (NLP), categorization and clustering engines, and statistical approaches for processing the outputs of human language, such as written or spoken texts. (p. 83)



**LT2013**  
A comprehensive panorama  
of a key industry  
for Europe's digital future

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

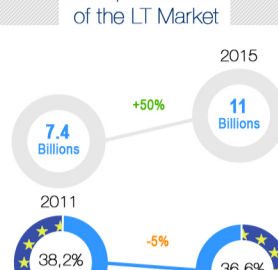


<http://bit.ly/13UAaST>

Discover the world of  
Language Technologies:  
Download LT2013!

# Facts & Figures about Language Technology in Europe

## 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.

## 3 Strategic Technology Markets covered by Global LT Industry

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



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

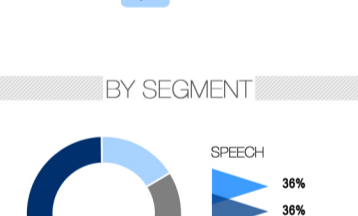


**TRANSLATION:** to ensure that we can automatically access and understand knowledge and information in any language.



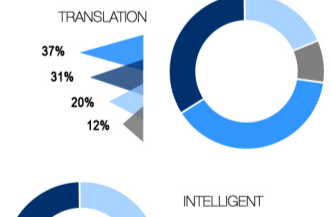
## Who is producing LT products & services ?

Europe's LT market has some 500 companies. Most of them are SMEs

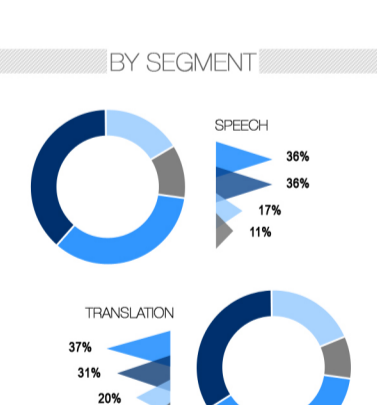


## How long have they been in business ?

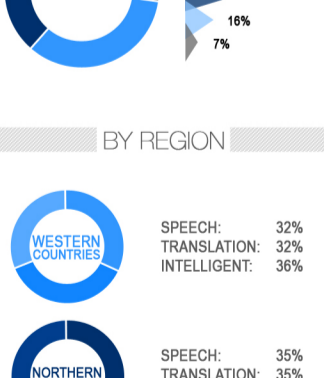
52% of European LT companies have been created during the last 10 years



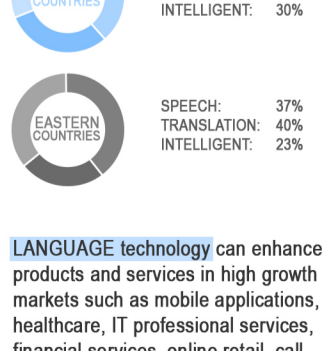
## Where are LT companies located in the EU?



## BY SEGMENT



## BY REGION



**LANGUAGE technology** can enhance products and services in high growth markets such as mobile applications, healthcare, IT professional services, financial services, online retail, call centers, publishing and media and many more.

Discover the World of Language Technology  
 Download LT2013!



http://bit.ly/13UAaST