

Internationalization & Localization: A Study

Localization Readiness: In the Eye of the Beholder

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Executive Summary

Sponsored by Lingoport in Fall 2007, the industry's first study to examine the dynamics and interplay between localization and internationalization revealed some compelling issues for participants in the market.

Specifically, there's a significant **"perception gap"** between clients and their LSPs when it comes to i18n knowledge and capabilities. While clients express confidence in their understanding of i18n, their LSP partners cast doubt on their real depth of knowledge.

More importantly, while superficial analysis suggests that clients, by virtue of their claims of deep experience and capacity in the discipline, "have i18n covered," a closer look suggests there's more to do. In short, there's evidence to support a **"false sense of security" in i18n coverage** on the client side.

Meanwhile, the survey indicates **LSPs don't maintain adequate i18n implementation capacity**, other than preliminary assessment and testing after the fact.

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Definitions

Localization ("I10n")

Localization refers to the **adaptation of a product**, application or document content to meet the language, cultural and other requirements of a **specific target market** (a "locale").

(Note: In the I10n abbreviation, 10 refers to the 10 letters between the I and the n).

Internationalization ("i18n")

Internationalization is the design and development of a product, application or document content that **enables easy localization** for target audiences that vary in culture, region, or language.

Note that i18n explicitly does not include the localization of the content, application, or product into another language. Instead, it involves the **design and development practices which allow such a migration to take place easily in the future, but which may have significant utility even if no localization ever takes place**.

(Note: in the i18n abbreviation, 18 refers to the 18 letters between the i and the n)

The Study

During September and October 2007, Lingoport, in association with Multilingual Computing magazine, staged a survey to measure knowledge and attitudes with respect to internationalization ("i18n")

and localization (“I10n”) within client companies and their service providers.

The survey was created by Lingoport, posted online, and promoted to readers of MLC, as well as to Lingoport’s existing customer list and attendees of LocalizationWorld 2007. The results were discussed at a special workshop hosted by Lingoport at LocalizationWorld.

In all, 54 responses were received. 26 responses came from client companies, chiefly medium- to large-sized technology firms. 19 responses were received from localization service providers (LSPs), and 9 came from individuals who categorized themselves as “Other” – mainly consultants to both of the other groups.

Note that respondents self-selected from an already sophisticated group with respect to i18n and I10n. Lingoport’s client base, in particular, is unusually experienced with respect to i18n and how it relates to I10n, by virtue of their familiarity with Lingoport, a leading provider of i18n services and tools.

Results from the survey, therefore, can’t be directly extrapolated to the LSP/client population as a whole. Still, it reveals interesting contrasts in perception between service providers and clients, and indicates that there’s far more work to do in i18n than meets the eye.

Localization: What’s Going On?

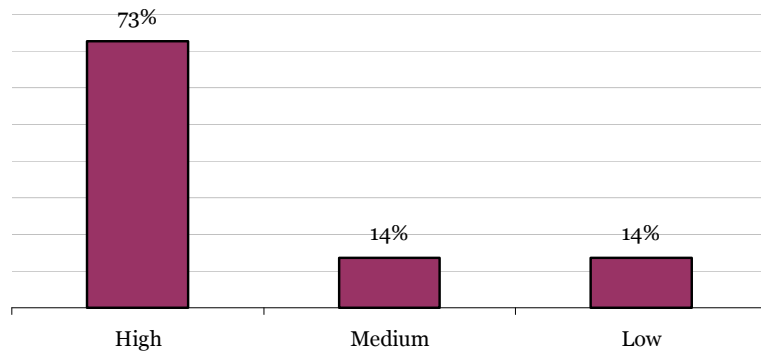
The study asked a variety of questions related to respondents’ use of localization services (asked of clients) and the scope and variety of services in this area offered (by LSPs).

Client perspectives

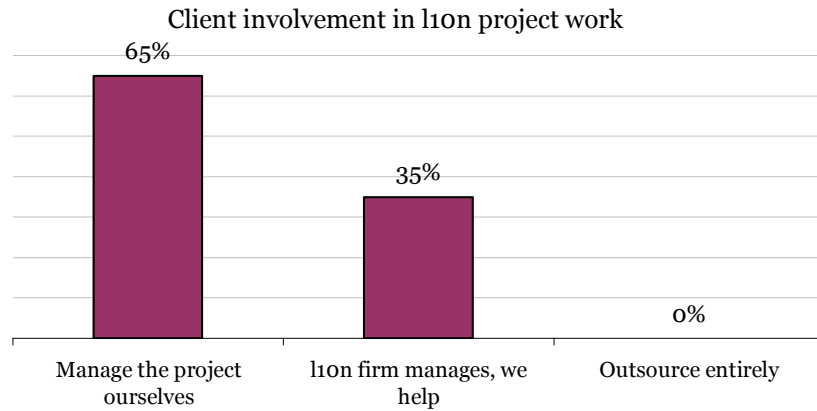
Among clients, some important insights emerged about their use of LSPs, as well as their general perceptions of I10n project work.

To begin with, clients asserted deep experience in either contracting for or carrying out I10n project work.

Client Localization Experience



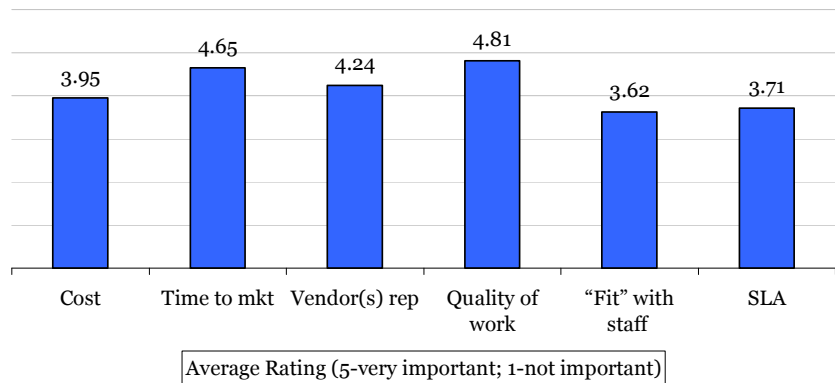
Additionally, survey respondents take an extremely active role in the project work they undertake.



Note that outsourcing - turning over total responsibility for the project to the LSP, from inception to release - simply doesn't happen. Clients uniformly involve themselves in the work, to varying degrees.

Given this level of experience and a hands-on approach, it follows that clients have specific criteria for evaluating and choosing LSPs.

What matters in LSP choice?



Clearly, a wide range of factors is considered in LSP selection, but **quality** and **time to market** stand out.

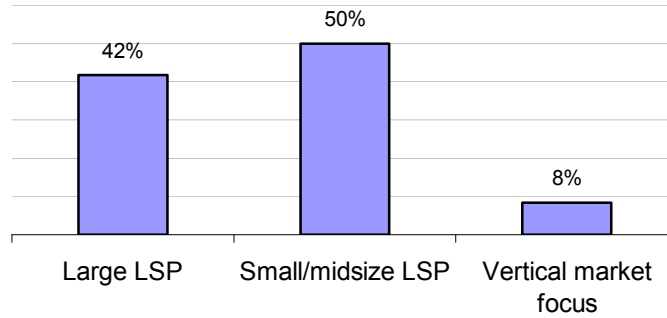
That second factor is critical as it relates to i18n work. **The promise of i18n, primarily, is that it reduces the risk and timing of I10n work, for the short and long term.** So the weight clients assign to that factor in selecting is, in turn, a powerful indicator of the importance i18n has to this audience - whether or not they fully understand the benefits it offers.

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LSP perspectives

LSPs who responded to the survey span a gamut of size and capabilities.

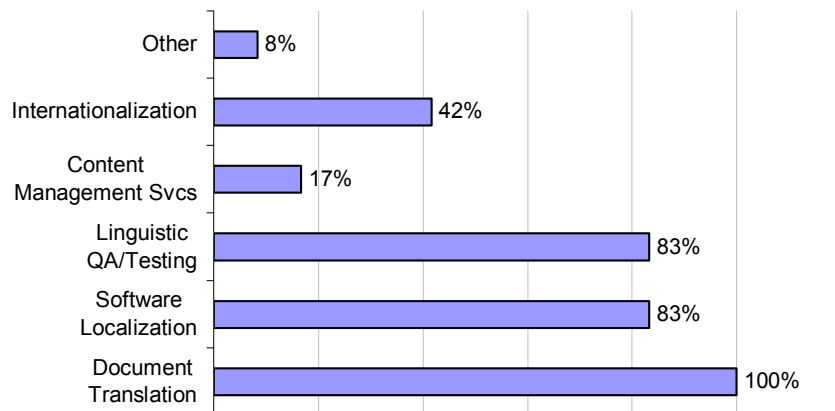
LSP size/profile



This size distribution is skewed, of course, when compared to the industry as a whole, which in sheer numbers is heavily weighted toward small specialty firms.

The survey's "size bias" helps explain the wide range of services indicated as offered by respondents.

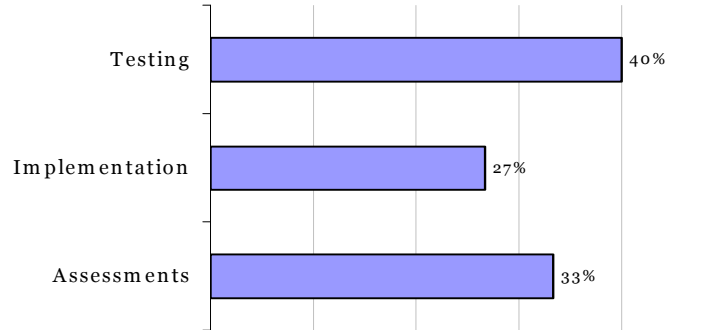
LSP-offered services



No surprise on the "base" services every LSP offers: document translation. What was surprising was the high % who claimed offerings in **software localization** and, to a lesser extent, in **internationalization**.

What's not clear is what LSP respondents mean by "internationalization" in the response above. A subsequent question attempts to probe this issue.

i18n services offered



Clients can expect that only about **11% of LSPs** to **provide comprehensive i18n support**

This helps clarify the previous data. Amongst those that claim to offer internationalization, a **relative few LSPs (less than 30%) are equipped to implement** – that is, carry out – **i18n project work**. More are able to produce i18n assessments and test the results of i18n work after the fact.

Combining this learning with that of the prior chart, it suggests that clients can expect that only about **11% of LSPs** – of the advanced type profiled in the survey results – to **provide comprehensive i18n support** for their needs.¹ A slightly smaller group can scope their clients’ i18n challenges, through assessment services.

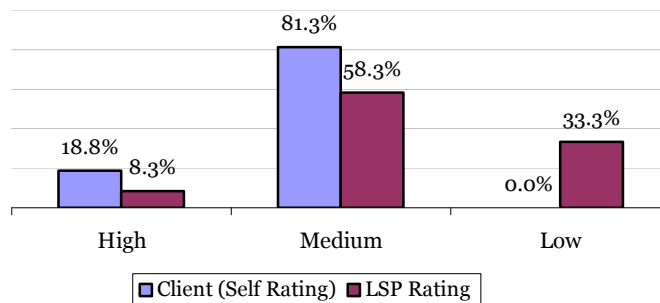
We’ll delve into what client capabilities are in this area shortly.

i18n: Client Status

We’ve seen indication of familiarity – and limited in-house capabilities – with internationalization among LSPs. But where do clients stand in their knowledge, experience, and capabilities in this area?

That all depends, of course, on whom you ask. When quizzed on this topic, our client respondents indicated solid knowledge and experience in the area. Their LSPs, however, weren’t so sure.

How much do Clients know about i18n?



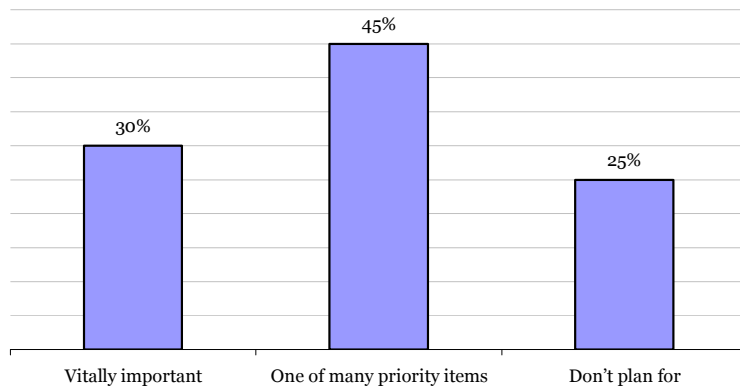
¹ 42% of LSPs offer i18n; of those, 27% offer implementation

Even within this sophisticated audience, there's substantial room for improvement in i18n knowledge and understanding, especially if our LSPs' opinion is valid.

If LSPs are accurate, about **1/3 of clients have low or no understanding of i18n**. This has important implications for the state of their code, and the success rates of future I10n work.

Still, client respondents rate i18n as important in their overall development objectives.

How important is **i18n** to Clients?

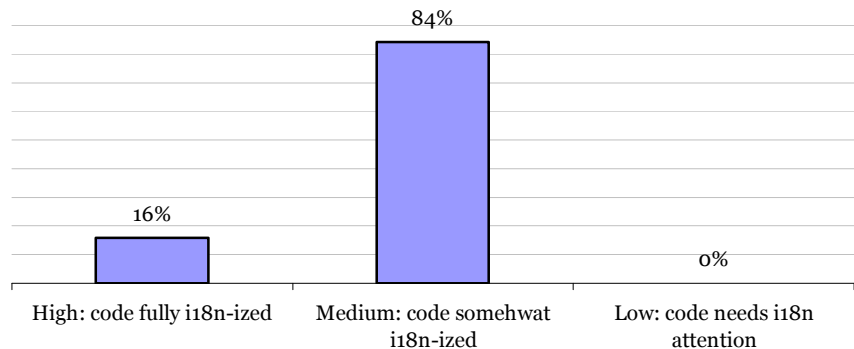


1/3 of clients have low or no understanding of i18n... and fully ¼ of respondents don't plan for i18n at all.

Though it's an important issue to many clients, notice that **fully ¼ of respondents don't plan for i18n at all**. This is a striking finding from a group self-selected (by virtue of the survey's target) to know and care about the topic. The "general population" of clients is certainly less likely to plan ahead in this area.

When asked about their direct experience in i18n – that is, whether they've actually done project work – client status is quite positive, upon first glance.

How much **i18n** experience?

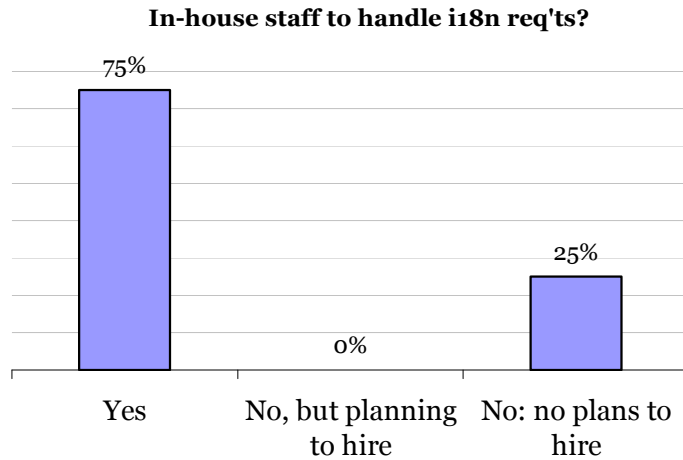


The number (16%) that indicates they've "fully i18n-ized" their code is remarkably high. Of course, Lingoport's experience suggests it's typical that subsequent I10n project will expose unsuspected

problems in this area, so a false sense of security could be at work here.

The more significant figure is the 84% that report they pay active attention to the problem. They're keenly aware of the issue and applying resources to it – a clear indication they consider themselves “ahead of the i18n curve.”

This is further borne out in client commitment to maintain staff to handle i18n needs.



Broad-based i18n experience is rare – particularly so on the client side, given the **varied development demands** of a diverse technology company.

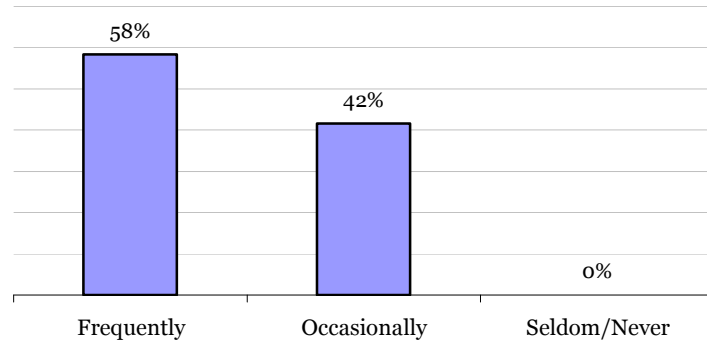
A remarkable proportion (75%) asserts they have the manpower to handle i18n issues that arise. The survey didn't probe on whether this is staff specialized in the area, or other engineering staff available in a pinch.

That's an important distinction, since broad-based i18n experience is rare – particularly so on the client side, given the varied development demands of a diverse technology company. This could explain the utter lack of interest in new hiring – they either don't feel they need it, or realize it's nearly impossible to find on the open market.

In any case, it's tempting to conclude that, by and large, clients have their i18n challenges well in hand, at least among this rarified survey base.

The LSP perspective here provides a strong contrast, however. Though identical questions were not asked of LSP respondents, an indication of an alternate reality is available by LSP response to the question of how often i18n comes up in their I10n project work.

Frequency of i18n need (LSP rating)



This data is challenging to reconcile with client perceptions. If, as clients assert in previous responses, i18n is either completely or mostly under control, how is that LSPs so frequently see need for additional efforts in the area?

One logical conclusion: **clients may lack sufficient experience to truly know the extent of their i18n challenges, though they believe they do.** Their LSP partners, more likely to see such needs in all shapes and sizes across clients (and therefore more reliable in their judgment), think there's more here than meets the eye.

Conclusion

The survey presents some intriguing implications for clients and LSPs. Is i18n fully understood by all concerned? If not, can the “false sense of security” clients appear to have about i18n be trusted? And how can their LSP partners, lacking sufficient resources (but compelling “pattern recognition” ability) in the discipline, rise to the challenge?

Clearly, the need for specialized, experienced resources to support both client and LSP i18n requirements exists. Lingoport, a leading provider of tools and services aimed squarely at these issues, is representative of an emerging solution to the problem implied by the survey, equipped to help in both the diagnoses and cure for the malady described.

For More Information

A vital resource for developers of global web applications is the Internationalization Core Working Group, part of the W3C Internationalization Activity.

Learn more at <http://www.w3.org/International/core/>.

You'll find in-depth technical information about best practices for information architects, software developers, and other technology professionals with ongoing internationalization requirements.

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About Lingoport

Founded in 2001, Lingoport, Inc, helps global businesses adapt and leverage their software for world market readiness. Lingoport's internationalization Services, including code analysis, i18n implementation, testing and training supports the global business objectives of leading international companies, and the company's market-leading Globalyzer software helps companies systematically adapt their software code and development practices to be more efficient for worldwide customers who demand that software works the way they expect it to.



In addition to its offices in Boulder, Colorado, Lingoport maintains development offices in Laramie, Wyoming. For more information, call +1-303-444-8020 or visit <http://www.lingoport.com>.

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