



**Bureau de la
traduction**



**Translation
Bureau**

Soaring Demand, Shrinking Supply in Translation

What Canada does to make ends meet ©



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About the Translation Bureau

- **Canadian government agency created in 1934**
- **Mandate**
 - To provide translation and interpretation services to Canadian government departments and agencies, including Parliament
 - To standardize terminology in use in government institutions



About the Translation Bureau

(cont.)

- **Some facts and figures:**
 - Staff of about 1,200 translators, interpreters and terminologists
 - Inventory of some 800 suppliers
 - Language combinations: 150
- **In 1995, loss of monopoly:**
 - Private entreprise in a government environment
- **Business volume : appr. \$100M US**
 - 100% billed by the hour or by lump sum



Challenges facing the world's translation industry

- A **Security of supply**
- A **Evolving nature of demand**
- A **Image**



A. Security of supply

- **What do Seattle, Davos, Prague, Nice, Göteborg, Québec, Doha, Montréal, Cancun, etc. have in common?**







A. Security of supply (cont.)

- **Globalization pushes local cultures to assert themselves.**
- **In the last decade, 28 new countries have been created.**
- **MacLuhan's global village is here ...**
... but language is the final frontier.



• Security of supply (cont.)

Globe of villages

• Languages in the world¹

- 6,800 living languages
- 600 with written tradition
- 95% of world population= 100 languages
- 49% of world population= 13 languages
- 100 languages spoken by more than 10M people
- 20 languages spoken by more than 50M people
- 8 languages spoken by more than 100M people

➤ Mandarin:	14.89%
➤ Spanish:	5.5%
➤ English:	5.4%
➤ Arabic:	3.5%
➤ Bengali:	3.2%
➤ Hindi:	3.09%
➤ Portuguese:	2.89%
➤ Russian:	2.89%
➤ Japanese:	2.1%
➤ German:	1.6%
➤ Korean:	1.3%
➤ French:	1.2%
➤ Vietnamese:	1.1%

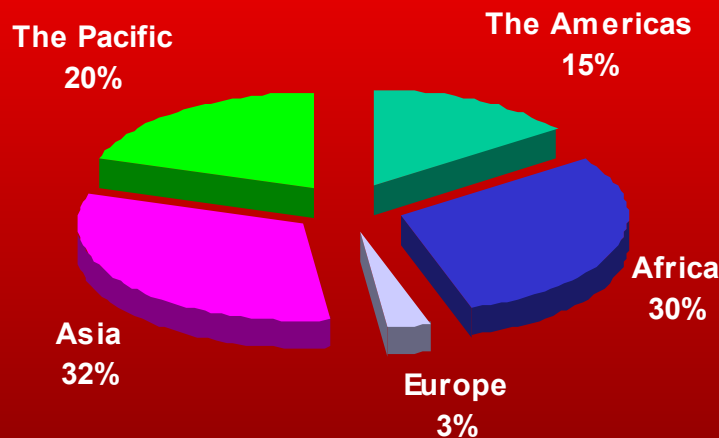


¹ Sapient

• Security of supply (cont.)

Globe of villages

Geographic Distribution of Living Languages²

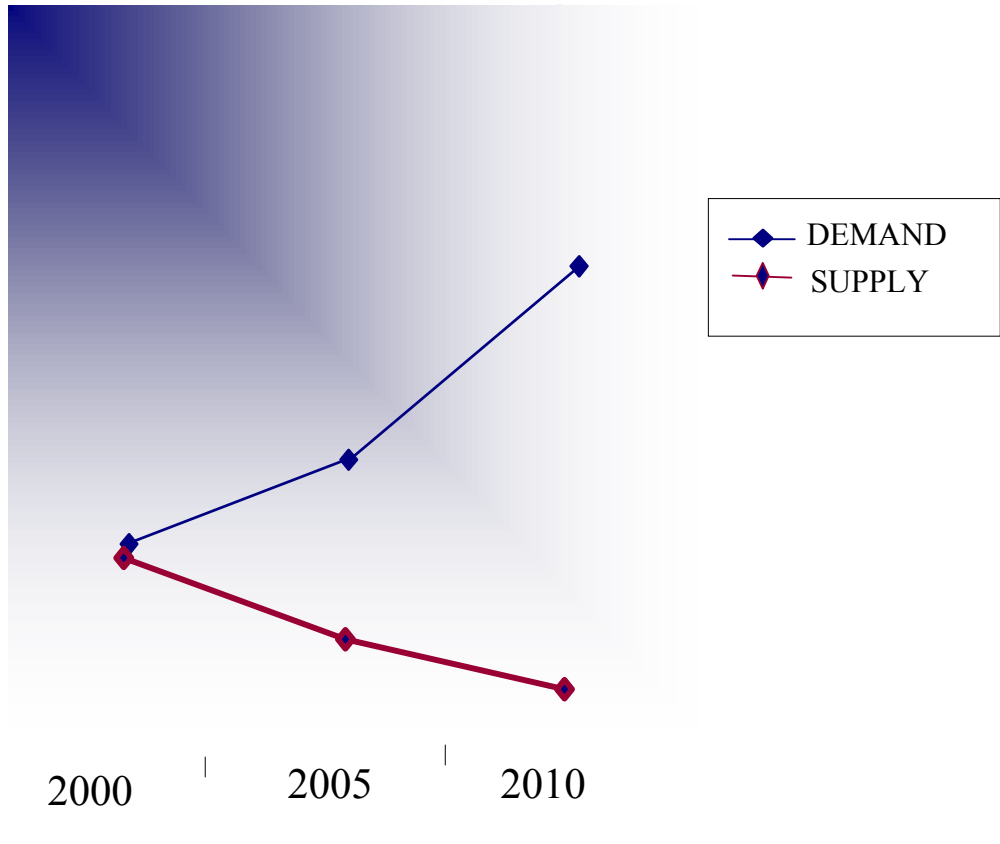


The Americas	1,013
Africa	2,058
Europe	230
Asia	2,197
The Pacific	1,311



• Security of supply (cont.)

GAP BETWEEN SUPPLY AND DEMAND



- **Globalization pushes translation demand through the roof.**
- **Demand increasing 10%-25% a year; doubling every three to seven years³**
- **Supply is not following.**
- **Quality is the driver.**
- **Few economies of scale in this market – Mozart effect⁴**



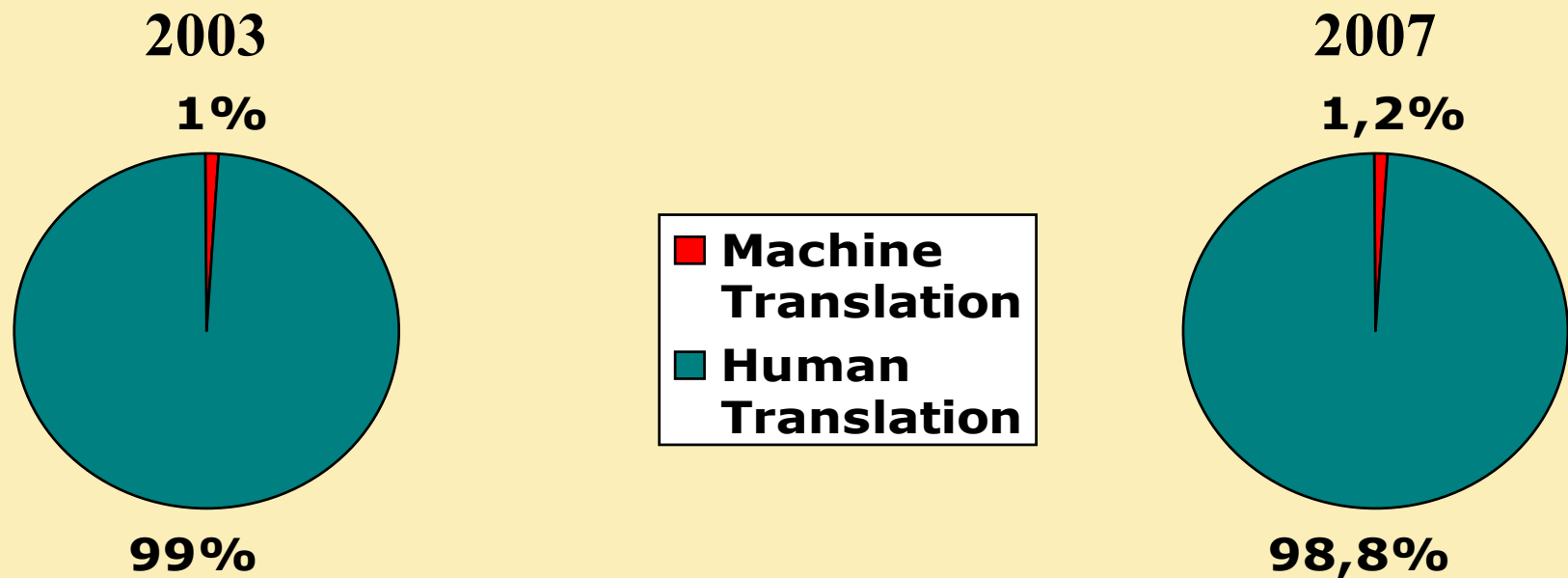
³ Various sources (Allied Business Intelligence, Forrester Research, Canadian Translation Industry Sectoral Committee)

⁴ LISA Newsletter, Volume XII, 3.5, August 2003

A. Security of supply (cont.)

- **Better mix of human intervention and technology desperately needed.**

Translation Revenue by Market Share⁵



⁵ Allied Business Intelligence, 2002

B. Evolving nature of demand

- **Language is mankind's supreme invention.**
- **Language allows for flow of huge quantities of information.**
- **A typical language comprises:**
 - 100,000 words
 - 10,000 rules for syntax and others
 - 1,000,000 pieces of semantic information



B. Evolving nature of demand (cont.)

- **3,000 years B.C., move from oral culture to written culture**
 - change happened over one generation
- **In the 15th century, printing was invented.**
- **Gutenberg's invention greatly influenced political, religious and scientific thinking in the entire world.**
- **It's arguably the single most important invention of mankind... after language.**



B. Evolving nature of demand (cont.)

- **Printing came when great explorations began and international trade took off.**
- **Accurate, codified and readily accessible documentation was essential.**
- **“Scriptoria” – writing rooms where scribes were handwriting everything – could no longer cope with demand.**
- **In a way, writing reinvented itself.**



B. Evolving nature of demand (cont.)

- **Enormous volumes of information required new ways of managing it:**
 - indexation
 - cross references
- **Creative links between ideas seemingly having no correlation with one another**
- **Today, birth of multimedia culture (television, video conferences, voice mail, etc.)**
 - change happening over one generation
 - will likely result in shifts similar in magnitude to printing



B. Evolving nature of demand (cont.)

- **Great explorations and international trade paved the way to printing in 15th century.**
- **Globalization has done the same with Internet.**
- **With globalization, society needed a new way to gather, circulate, manage, structure, analyse, interpret, harness phenomenal volumes of information in text format.**



B. Evolving nature of demand (cont.)

- **Now we're adding voice, picture, animation.**
- **In a way, writing is reinventing itself.**
- **Printing resulted in**
 - disappearance of scribes
 - codification of languages
 - new ways of managing information
 - unprecedented evolution of mankind



B. Evolving nature of demand (cont.)

- **Internet changes drastically the service sector:**
 - service import/export
 - e-commerce
 - elimination of geographic barriers
 - elimination of frontiers
 - elimination of middlemen



B. Evolving nature of demand (cont.)

- **Internet already impacts on language and culture**

- digital editing

- automatic notation
- multilingual alignment
- coding
- indexing and standardization
- controlled writing
- automatic summary
- semantic filtering
- human-machine communications
 - voice recognition
 - voice synthesis
- CAT and MT



B. Evolving nature of demand (cont.)

- **Attempts at managing huge volumes of information of today's world.**
- **Internet changes drastically translation**
 - instantaneous communications
 - multilingual websites
 - constant updates → simultaneous translation
 - voice and images
 - localization
 - wide spread use of translation tools (terminology management, TM, MT)



B. Evolving nature of demand (cont.)

- **Internet brings competition to your client's door.**



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C. Image

- **Commoditization of translation**
 - large volume
 - focus on unit cost
 - seen as non-specialized product/service
 - standardized/standardizable processes through automation
 - quality taken for granted
- **Technology often hailed as the one and only way to meet clients' needs.**



C. Image (cont.)

- **Business proposition in translation/localization focusing on:**
 - automated processes
 - standardized formats
 - reduced cost
 - decreased turnaround times
 - increase ROI
- **It leads to service offering like this one:**





Once Our Software Translates
the Word “Money” into “Dinero,”
You Won’t Have to Spend
More “Dinero” Translating
“Money” Again.



C. Image (cont.)

“We have become fixated with our clients’ “words” and not what they want to achieve with them, becoming cross-language secretaries and not cross-cultural communications consultants. We sell words or even keystrokes and not ideas.”⁶



About Canada

- **Bilingual country**
- **Multiculturalism policy**
- **Multicultural mosaic**
- **Where there is linguistic duality and multiculturalism, there is translation and interpretation.**



About Canada (cont.)

- **Second largest country in the world**
- **Its population accounts for only 0.5% of the world's population.**
- **Yet Canada leads G-8 countries in exports**

Exports as a percentage of GDP

Canada	47%
UK	27%
France	26%
USA	12%



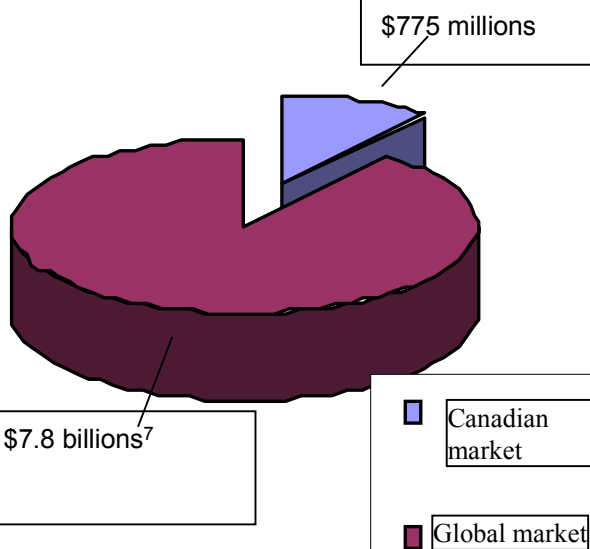
About Canada (cont.)

- **In today's market place, trade is done in the language(s) of the target market.**
- **Exports, combined with constitutionally guaranteed language rights, probably make Canada the leading country in the world for translation.**



Some facts and figures about Canada

Canadian and global translation markets



- **Canadian market: 10% of global market**
- **Long linguistic tradition**
- **Large pool of language professionals**
- **Multilingualism and multiculturalism**
- **Recognized university training programs**
- **High quality standards**
- **Legally recognized professional certification**
- **Firms specialized in technolinguistics R & D**
- **First in the world for eGovernment maturity⁸**

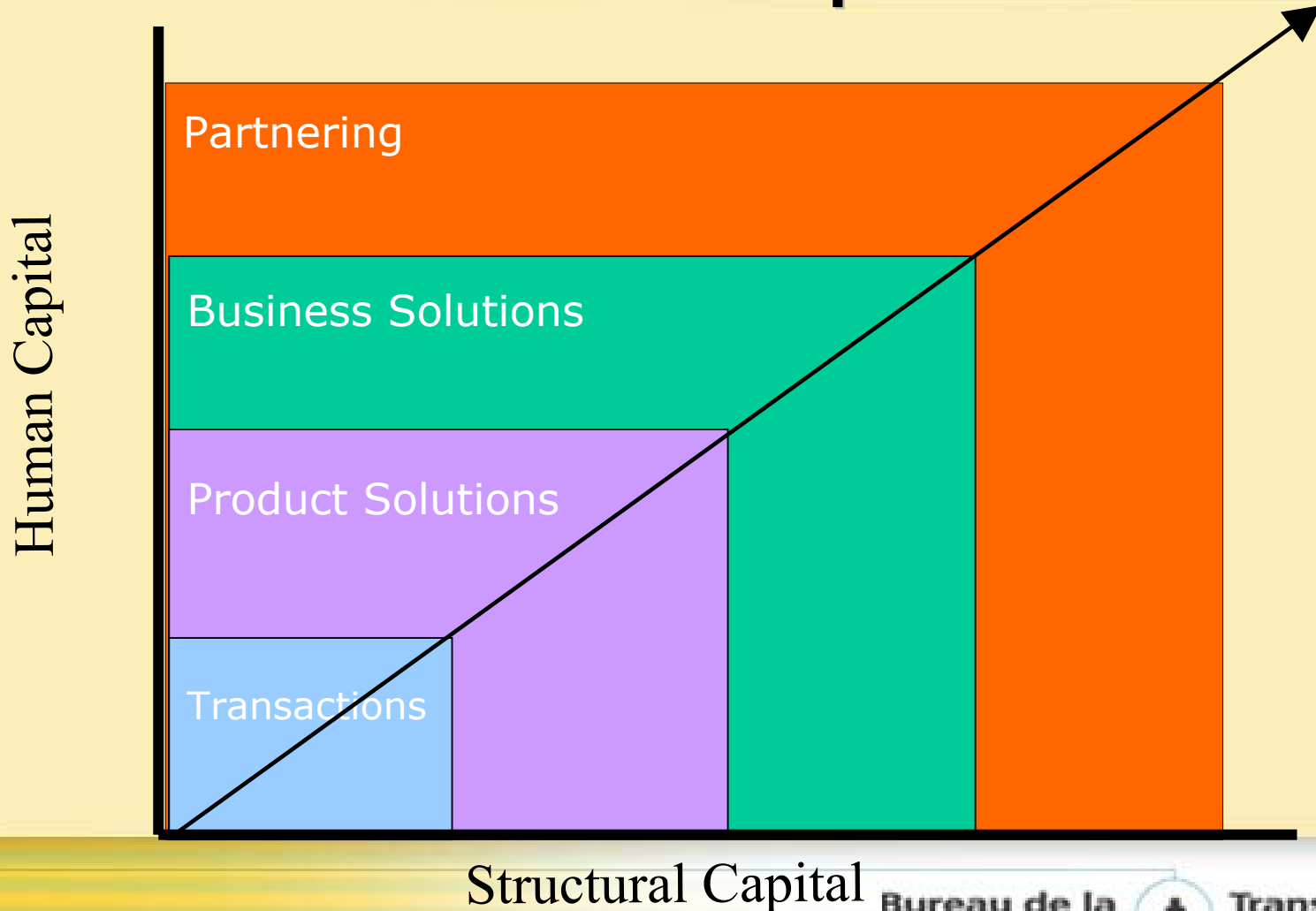


⁷ Allied Business Intelligence, 2002

⁸ eGovernment Leadership: Engaging the Customer, Accenture, 2003

About Canada (cont.)

Customer Capital⁹



Structural Capital



About Canada (cont.)

- **Three university programs in localization; two at the post-graduate level**
- **Partnership and/or coop programs in all universities**
- **Language Industry Association**
- **Marketing and branding initiative**
- **Design of a new localization model with major benefits to both clients and suppliers**



About Canada (cont.)

- **Creation of a R & D centre on language technologies**

