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Executive Summary

Developing and managing eContent has become a strategic challenge for businesses worldwide. Any business with a web site has become an eContent publisher. With the Internet trading environment becoming more popular, there is increasing pressure on eContent publishers of all types to adapt their content for international markets. Localisation is ultimately one of the key drivers of the business expansion on the web. For many eContent publishers, localisation may not be a familiar concept, thus, the main objective of the eContent survey is to identify the active players (an emphasis in the European region) in eContent and introduce localisation to them. This ELECT eContent survey considers the main trends and development of the various industries relating to web technologies and localisation. The eContent publishers are categorised into the following areas:

- eContent provider which is further categorised into the following industries:
 - eBusiness
 - Education
 - Entertainment & Media
 - Games
 - Government/State
 - Hardware
 - Healthcare
 - Legal & Financial
 - Marketing
 - Non-Government Organisations
 - Search Engines
 - Software
 - Sport & Recreation
 - Telecommunication
 - Tourism & Travel
- eContent service provider
- Localisation provider

This report is compiled using various methods, such as reviews of market research, emails, journals etc., Appendix A, B and C lists out the companies consulted in this report according to the different areas. The complete list of companies are published in deliverable 4.3, “The Localisation and eContent Directory”.

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Introduction

Although most people around the world can access the web, having a global web presence doesn't guarantee global business and communication. For companies to succeed globally, they must operate in the languages, business practices, and cultures of their customers or target markets. Companies that globalise successfully are willing to assess and restructure everything from their internal business practices to their technical capabilities, in order to prepare for cross-border trade. Successful globalisation efforts allow companies to penetrate new markets and increase revenue. Internationalisation creates a low-cost global platform for advertising, marketing, sales, procurement, distribution, and support, allowing companies to leverage their assets around the world.

Internet users from the United States, once the overwhelming majority online, now account for less than 40% of all web users worldwide, according to the Forrester Research firm. English is also losing its grip as the dominant language on the Internet. According to Global reach, in 2003, 64.8% of the online population were non-English speakers, compared to 52% in 2002.

Moreover, buyers and sellers on the Internet will increasingly be based outside North America, according to IDC. Worldwide e-commerce revenue for both business-to-business and business-to-consumer transactions will rise from \$350.38 billion in 2000 to \$3.14 trillion by 2004, accounting for 18% of total world exports. Forrester predicts that Markets outside North America will account for 50% of those revenues as early as 2004.

Ray Tong, partner with The Tong McCandless Group, a consulting firm that helps companies enter international markets, says "A company, naturally, can attempt to globalise without using the Internet, but the most cost-effective way to reap the benefits of globalisation is to create a sustainable, global web presence that reaches target customers in their native languages and cultures." Hence, enter localisation. Localisation is a necessary step for the globalisation of any business. Localising the contents of the website into the target language is the first step for any company to reach their target markets as well as retaining their existing one. It is more appealing to potential customers if the products/services are in their native language. It is especially true now, with the recent global economic downturn, as companies need to distinguish themselves in order to remain competitive in the global market.

Although most multinational companies have their websites localised into one or more languages other than English, some of the Small to Medium Enterprise (SME) have may not be in a position to do this. This report will identify some of the major eContent publishers in the European region categorised by industries and introduce the need and the advantages of localisation to them, if they want to remain competitive in the global market.

eContent provider

Developing eContent, the information that is published on any Internet platform, has become a strategic challenge for businesses around the world. Any business with a website has become an eContent provider/publisher. This section will list out all the major industries that have a web presence.

eBusiness

eBusiness is more than the web automation of existing business processes, technologies, or information. The newest capabilities and ideas create the framework for a single online system that coordinates everything from discovering customer needs to managing supplier product pipeline. Marketing, customer relations, product delivery, supplier management, accounting, and information systems do not just work together by passing messages and information. They rely on each other by sharing common functions and events.

eBusiness, put simply, is the use of technology to enhance how you conduct business. Instead of simply creating an information type website, eBusiness involves the systematic appraisal of all your operations and determining how any of these processes could benefit from moving online. Before Internet trading was widespread, purchases were conducted in shops. However, this has changed due to the increasingly accessibility of the Internet. Online shopping provides the customer with the information they need to conduct business, and make an informed buying decision.

Online purchasing is the technology infrastructure for the exchange of data and the purchase of a product over the Internet and it has recently become one of the major online activities. Online stores such as Amazon or BarnesandNoble are generating enormous amounts of revenue by selling products ranging from books to electronic hardware. One can even rent a movie or do their grocery shopping online. The rising popularity of online shopping is due to the convenience it provides and will continue to grow.

Education

Traditionally, institutes of education were never viewed as businesses. However, in recent decades, institutes of higher education are becoming very much like businesses (if it is not already considered as another form of business). The emergence of new technologies, growing competition, tightening budgets and changing student demographics are driving dramatic change in the delivery and reach of services provided by institutes of higher education.

Like any business, universities and colleges are using the Internet to attract more students. Up until recently the targeted demographics of universities and colleges were concerned mainly at national level. However, this trend has changed drastically. Universities and colleges are now recruiting at an international basis to attain a more diverse student population. This is where localisation comes in. The most effective way to attract potential international students is through the websites of the institutions. Therefore, it is necessary to accommodate for the needs of all prospective students through their websites.

Global education is advancing rapidly as a result of recent developments in communications. Yet cyber universities and on-line study are never likely to replace, altogether, the traditional terrestrial locations that also globalise higher education. These places on the ground bring with them human populations, each with its own culture. So culture needs to be taken into account, especially if any given system of education is to venture into foreign societies.

Universities and colleges are turning to eBusiness solutions to better manage the enterprise and provide a competitive edge. In particular, institutes of higher education are using eBusiness applications to become more profitable and efficient. eBusiness enables universities and colleges to control costs, streamline operations, improve and extend services, integrate disparate parts of the educational system, and improve fundraising. These and other trends have encouraged institutes of higher education to increase their presence on the web.

Entertainment & Media

There is no doubt that the Internet will shake up distribution channels and disrupt the status quo in every category of the entertainment & media industry. However, it is only recently that entertainment and media services companies are, for the first time since the advent of the Internet boom approaching the Internet and its many distribution and profit opportunities with prudence. With broadband access and availability still lagging, although with gathering speed, this is the ideal time for companies to explore their Internet readiness in preparation for the changes ahead. In fact, for the first time, the lull is allowing companies to approach the Internet and its many distribution and profit opportunities with a level headedness that was missing during the heady times of Internet mania.

The technology is imperative, because the future of entertainment over the Internet will include such bandwidth-intensive applications as video on demand, interactive TV, and multiplayer gaming. And without a stable, reliable network infrastructure, broadband services cannot achieve maximum functionality.

Policy issues also loom large as the media and entertainment industry becomes increasingly web-enabled. Content protection is of critical concern because of issues such as unauthorized copying, as well as distribution and playback of valuable digital content. Developing an open standards approach to protecting data is also imperative, as demonstrated by the Open Conditional Content Access Management (OCCAM) proposal. Finally, media and entertainment industry leaders must determine how to balance the interests of both consumers and content providers.

Games

This is one of the most exciting and fast-growing sectors in the digital content industry. Recent figures from the Entertainment Leisure Software Publishers Association (ELSPA) show that games consoles are truly becoming mass market. Globally an unprecedented 30 million Playstation2, XBox and Gamecubes were sold in 2002 and it is predicted that another 33 million will be sold in 2003. ELSPA find that in response the world market for games and entertainment software will grow to US\$18.5 billion in 2003, up from US\$16.9 million in

2002. Within the UK alone, leisure software sales grew again in 2002 to reach £1.081 billion (US\$1.724 billion) and continue to have the third largest market in the world for games after the US and Japan. Also, Western Europe will become the world's biggest market for computer games software within two years (BBC news, 13 March 2002). Therefore, one can see the potential profit being made in the European games market. There are reasons for such expansion in this particular market. The overall games market is expanding thanks to demographic changes; aging boomers who grew up playing video games are still playing; and potential new gamers are born every day as the standard (graphics and the level of difficulties) of video games are highly sophisticated and not considered as childish anymore.

The Internet is used as one of the main marketing tools for games developers/publishers to publish the release date of the new games or information about their new games. Although, some of the games are localised into different languages to accommodate the diversified customers, it is also very important for the publishers to localise their eContent in order to attract new customers and retain their old ones.

Government/State

Most public sector organisations are under great pressure to reduce costs and to improve customer satisfaction levels and operational efficiency. To help meet these goals, more public sector organisations are adapting the practices of the commercial sector to become more efficient and to provide the highest quality of service. In the commercial world, the Internet and eBusiness technologies have forever changed the business landscape. Now, in the midst of the eBusiness revolution, public sector organisations have the opportunity to also fundamentally transform both services and service delivery methods to improve communication and interaction with customers, partners, businesses, providers, suppliers and other public sector organisations. Information technology is the driving force, and a sound eBusiness transformation strategy is a critical factor for success.

As budgets shrink, governments are managing assets more effectively and deploying resources where they will have the greatest impact. Meanwhile, the ongoing goal of governments is to improve service to all of their customers-businesses, individual citizens, partners and other governmental departments who expect increased service levels and accountability. Governments need to dispense services and information via communication channels that meet customer needs. Government customers have diverse needs and requirements and are becoming customer service savvy and demanding. Traditionally, citizens interact with governments for a variety of reasons and through a variety of channels based on their preferences, including: face-to-face, telephone, fax, and written correspondence. Now, they are provided with more options such as e-mails and the Internet, which are more efficient. Customers are willing to accept a more "self-service" government. At the same time, customers expect consistent, quality experiences independent of the type of inquiry, interaction method, media or time of day. Differing preferences among customer groups will force governments to offer a range of online and offline customer service option.

In 1999, the European Commission (EC) established the eEurope2002 Action Plan. This plan sets aggressive targets for moving government services and information to the Web. The EC

chose 20 common government services, including income taxes, car registration, building permits, and public libraries, 12 aimed at citizens and 8 aimed at businesses, and challenged its member nations to put them online. When the research company, Cap Gemini Ernst & Young, last checked in April 2002, 55% of services overall were online. Ireland led the pack, with 85% of the 20 public services online. The Scandinavian countries clustered near the top Sweden at 81% and Iceland (50%), followed by Luxembourg (22%), Switzerland (35%), and the Netherlands (42%).

According to Cap Gemini Ernst & Young, European governments were more likely to implement income-generating services, as well as those targeting business (68%) rather than citizens (49%). Putting more services online didn't necessarily mean more citizens accessed them. Swedish citizens use the online e-government services the most at a figure of 78%. Despite having the most services available online, only 35% of Irish citizens have visited e-government websites, according to the European Commission and Eurobarometer (surveys and studies published by the European Commission that address major topics concerning European citizenship). Another initiative, eEurope2005, which sets different benchmarks than eEurope2002 and puts users at its centre, focuses on e-government, e-learning, e-health, e-business, broadband (including public Internet access), and infrastructure security.

The next step now will be to ensure that the different member states can interact with one another via their e-government through a variety of European languages.

Hardware

In the last few decades, the hardware industry has undergone tremendous changes. Before, computer and its peripheral were expensive, such applications were only used by multinational companies or governments, therefore not widespread. However, this is no longer the case. As people become more educated and recognising the usefulness of such technology, the demand for computer was growing constantly. Hence, the prices of computer dropped drastically and the widespread use of computers began. In modern day, the hardware industry, both in terms of manufacture and design, operates on an international basis and with increased globalisation of the electronic supply chain.

Globally, the computer hardware market appears tied to the health of the US economy, which consumes 50 percent of the world's total. In the recent years, the growth of computer hardware has slowdown due to economic recession. Now, more than ever, hardware companies around the world need to maximise their global appearance and the Internet is the best medium to do that. Most of the multinational hardware companies has their website localise into different languages, which most small to medium are failing to do. One of the reasons is that localisation will increase their cost, however, if they consider the kind of opportunity that localisation offer, the extra cost is more than justifiable.

Healthcare

The Healthcare industry comprises of well-knit services provided by the Pharmaceutical & Biotechnology, Healthcare Provider, Healthcare Insurance and Biomedical Technology

segments. All of these contribute directly or indirectly towards patient care. Today, the Healthcare Industry is undergoing a transformation focusing on improving the business processes through effective deployment and use of information technology.

The Internet has affected every aspect of the global healthcare industry, from the way researchers conduct medical studies to the nature of the doctor-patient relationship. Perhaps most significant is the way that the Internet has changed how people manage their own health and treatment by providing them with access to medical information and resources previously unavailable.

In the past, medical information was the exclusive domain of physicians. Patients depended on physicians to educate them about their conditions and their options and to determine a course of treatment. Today, people use the Internet to access their personal medical records, research treatment options, and compare healthcare providers. Many sites publicise studies that evaluate the quality of hospitals, physicians, drugs, and treatments. Online psychotherapy and physician consultations are available for those seeking medical opinions at their desktops. Armed with easily accessible information, patients today are active in asking questions and discussing their options. Sheri Sullivan, a healthcare analyst at e-commerce analysis firm Gomez, says the Web has helped make medical information more comprehensible. "It's not just information about diseases in terminology that we don't understand; it's user-friendly, it's for laymen, it's for consumers. And you don't have to go to just one website to find out something. You can look at many sites." she says.

Yet it's not only patients who are being empowered by the ability to access medical information online. Healthcare providers, too, can now more easily find the information they're looking for and stay up-to-date on the most current treatment options through databases of medical articles, journals, and conference summaries available online.

Healthcare organisations are becoming more entrepreneurial and streamlined by moving operations such as product ordering, catalog, and communications to the Internet. In addition, Internet technology allows healthcare organisations of all sizes, ranging from private clinics to small and large hospitals, to become interconnected via streamlined back-end administration and information-sharing systems.

Moreover, healthcare providers and pharmaceutical companies are simplifying their operations through automation, converting formerly paper-based information to a format that can be easily stored, accessed, cross-referenced, and distributed. For physicians, this involves creating electronic health records, moving functions such as patient referral and insurance eligibility data online, and filing claims online. Online self-service tools are helping to boost customer care efforts. For example, healthcare companies that deploy integrated web-based transaction systems and Internet Protocol contact centres differentiate themselves from competitors while keeping overhead to a minimum.

For pharmaceutical companies, the Internet offers a more efficient way at communicating with regulatory agencies. New drug applications, for example, are typically accompanied by documents that can exceed 50,000 pages. In the United States, pharmaceutical firms are

increasingly taking advantage of the Food and Drug Administration's ability to accept new drug application filings electronically, as this can significantly reduce the time and cost of processing the applications.

For all companies in the healthcare industry, internal online initiatives can enhance and support employee training. E-learning solutions are critical for building and developing learning-based content and can be integrated with HR systems for online skills assessment and ranking. Properly trained employees are able to handle patients and physicians appropriately, and the resulting productivity gains help create an optimised workforce and a more cost-effective company.

Legal & Financial

The Internet is transforming European banks, brokerage houses, and insurance companies. In this new environment, traditional financial institutions must rethink, redefine, and reengineer the way they serve and support their customers and conduct business within their organisations. Visionary financial services organizations are deploying Web-based applications that enable new delivery channels, provide competitive customer care through Internet-enabled call centres and online interfaces, and ensure fast delivery of new products and services while providing greater cost reductions. In addition, companies are migrating to Internet Protocol (IP) communications to connect customers, suppliers, partners, and employees with a common, resilient, and flexible network without regard to physical location.

Over the last few years, consolidation, divestitures, mergers, and the growth of the Internet have rocked the financial industry. A few heavyweight financial services players have emerged, but across Europe and in other countries, the market remains open. The Internet has lowered barriers to competition as nimble online companies emerge. At the same time, new markets are developing—from bill presentation to consolidated voice/data networks, smart cards, video banking centres, and Web-based automated teller machines. The challenge for financial services companies is to develop a comprehensive Internet strategy that integrates business with technological goals.

During the past several years, the creation of a unified market and a single currency, combined with a trend toward deregulation and privatisation, has created new business opportunities for banks, brokerages, and insurance companies. A wave of mergers and acquisitions, such as Bayerische HypoVereinsbank in Germany and UBS in Switzerland, has reshaped the industry, reducing the number of banks and other traditional players even as a growing number of new, untraditional competitors move into the market.

“Currently 50 million Europeans have embraced Internet banking as an essential part of their everyday lives. This will double in the next five years due to the reduction of cost and ease of accessing broadband from the home, and the number of new services offered by financial services companies. Consumers will soon be able to choose to pay their bills online, visit video banking centres, and use Web-based automated teller machines,” states Beat Umbricht, head of vertical segments for financial services at Cisco Systems in Europe. “The Internet

gives European consumers new sources of information about financial services, and it allows them to compare, evaluate, and switch between providers more easily than ever before.”

These changes have created unique challenges and opportunities for different segments of the European financial services industry.

Banking

Europeans have enthusiastically embraced online banking. According to a December 2002 Jupiter research study, the number of online banking users in Europe will increase from 54 million in 2002 to 103 million in 2007. Because European consumers are more likely to access the Internet through mobile devices such as phones and personal digital assistants rather than computers, banks that provide online services face the technical challenges associated with delivering information to smaller screens and securing wireless transactions. New competitors, ranging from supermarkets to insurance companies, are entering the European banking market, giving customers more choices even as they drive down prices and profit margins. As European consumers have come to expect one-stop shopping for their financial services within a single trusted brand, institutions that are able to create collections of bundled, tightly integrated online service offerings will enjoy a major advantage.

Each segment of the financial industry faces a unique set of challenges. For example, Internet-based services are now a prerequisite for all major retail banking players, particularly now that customer satisfaction is a critical success factor. Today, banks are challenged to move from a product focus to a customer focus and reorganize according to customer and market segments. Critical to a bank's success is its ability to retain the most profitable customers (as measured by their lifetime value) and win a greater wallet share of their existing customers. Research supports this priority, indicating that retail banks see most of their return from less than 20% of their customers, and that it's 90% more expensive to sell an additional product to a new customer than to an existing one.

Insurance

Faced with greater competition and shrinking profit margins, European insurance carriers are under intense pressure not only to reduce costs, but also consolidate operations and increase efficiency and productivity. As a result, insurance companies are investing heavily in technologies that can increase productivity and reduce labour costs. The Internet can play an important role in this process, giving firms a new channel for marketing and promoting their services; streamlining customer service functions such as claims processing and payments; and providing a cost-effective back-end communications and data networking infrastructure in an industry that already relies heavily upon information technology. A growing number of European insurance carriers are also seeking to establish themselves quickly and cheaply in other segments of the financial services market.

In the insurance sector, which traditionally has been marked by slow growth, low margins, and heavy regulation, competition is heating up from online players offering compelling new value in the sale and support of insurance products. To date, traditional carriers have been slow to respond, even though the online insurers are already altering consumer behaviour and expectations. Moreover, life insurance companies face competition from securities firms

courting baby boomers, who are beginning to seek enhanced estate planning online. These companies are realising that Internet solutions offer numerous advantages: As companies increase their online service offerings, they find they can reduce operating costs and streamline efficiently, as well as boost workforce productivity through internal initiatives such as e-learning programs.

Legalities and Securities

Large numbers of retail securities transactions are taking place via the Internet, especially in major markets such as Germany and France. Yet even as the Internet is rapidly expanding the securities market, consumers who use online trading services are demanding a larger variety of value-added services. As a result, securities firms are achieving a competitive advantage by offering an assets-under-management fee model, and by improving and sharing knowledge about their products and services. This, in turn, strengthens customer relationships. E-learning solutions will continue to optimise these relationships by streamlining internal information sharing and offering customers real-time information and advice.

The Internet is transforming the legalities and securities sector. Already, more and more retail transactions are taking place via the Internet, and although retail business has quickly made the transition to the Internet, most securities firms are struggling to move their institutional business online. Yet as securities transactions become popular and accessible, companies find that the need to provide value-added services increases. Securities firms are achieving a competitive advantage by offering an assets-under-management fee model and by improving and sharing knowledge about their products and services, which in turn strengthens customer relationships. E-learning solutions further optimise those relationships, offering customers real-time information and advice and streamlining internal information sharing.

Marketing

Traditionally, marketing falls into the following types of marketing options: sales letters, catalogues, telemarketing, and direct response TV ads. However, it has a new medium now, the Internet. This option is becoming an integrated part of any marketing campaign employed by marketing firms as new online technologies speed up the process of making a transaction and enhance the efficiency of direct marketing.

Today's digital marketing efforts cover the basics. Market leaders will optimise four key digital touch points: Web sites, email, promotions, and online advertising, to reinforce brand attributes and drive deeper engagements across a portfolio of products. According to the Forrester a marketing firm, all of the 22 of the big brand names that they audited have websites; three-quarters have email newsletters and online advertisement impressions grew 568% from Q1 2002 to Q1 2003. An interesting factor that may need to be taken into consideration is that two-thirds of Europe's affluent are online, and they're much more active online than the non-affluent. In order to tap into this enormous market, marketing firms need to be aware of the language and cultural barriers presented by the different countries within Europe.

Non-Government/profit Organisations

Non-Government/profit organisations are only just getting to grips with the potential of the Internet and how best to manage content on it. For small to medium charities, like their larger counterparts, it has become increasingly important to have an online presence. The increasing growth of the non-profit sector has increased the need for charities to communicate more effectively to the general public. A website offers a number of key benefits. For example, having a web presence allows a charity to reach a far wider audience and publicise its cause. Indeed many national annual charity campaigns run by Comic Relief, Age Concern and others use the web as an integral part of communicating events to the general public. Whether you are a small or large organisation the size of the audience you can reach is increased exponentially.

It is important for non-government/profit organisations to reach as many people as possible, as most of these organisations are dependent on the generosity of the people. In order to attract potential donor/member, it is important to inform people about the objectives of the organisation and how they are planning to achieve them. Hence, the Internet is a great tool to enhance the visibility of these organisations. One of the advantages of the Internet is that it is very easy to get organisations to act on another's behalf. Most organisations that ask for credit card payments over the Internet need to use third-party software and websites to take secure payments, and they only take a percentage commission. Moreover, providing the users the option of paying/contributing money online is a great incentive to donate, as they do not need to go to the trouble of writing a cheque and posting it.

By utilising the Internet a charity creates another channel to its audience that might catch people that does not read their local newspaper, but perhaps access community information on the Internet. An organisation can generate greater global awareness of its cause on the Internet, but one needs localisation to do this effectively. Many charities, particularly larger organisations, have already developed their own websites and localised their content in different language, for example Red Cross has presence in 178 countries and has their eContent localise according to those locales, the organisation has 115 millions volunteers around the world. One can see the advantage from the above example how important it is to localise their eContent for non-Government/profit organisations.

Search Engines

In the Internet age, search engines are critical to the pursuit of knowledge and further learning. As the Internet becomes the world's biggest information repository, search engines have become the tool for information retrieval, either for academic use or leisure. Search engines have also become one of the most effective online marketing tools, as companies are ranked by the engines according to the relevancy of the required subject/topic.

According to an article by StatMarket, between 8 and 10 percent of all e-commerce referrals come from search engines. The following table shows the countries that have the highest search engine referral.

Search Engine Referral Percentages by Country	03/06/2003	02/07/2003
Spain	21.53%	10.83%
South Africa	20.47%	12.49%
Brazil	19.04%	8.20%
United Kingdom	17.84%	11.51%
Australia	17.07%	10.88%
United States	15.07%	8.00%

Table 1 Search Engine Referral Percentages by Country

The above figures illustrate the importance of search engines on the Internet. Even some companies have incorporated customised versions of search engines with their websites to boost customer service, increase site traffic, learn about their users, and improve site design.

There are currently a total of 1,540 international search engines and 169 region/country specific versions. As the figures show competition is very intense within this small market, which is why it is very important for the search engine to appeal to the users. Hence, search engines need to distinguish themselves from their competitors in order to get the users to choose a particular engine. In this modern world, customers expect content tailored to their individual need, and what better way to do this than localising it into their languages and locale settings. Thus, users are more likely to use a search engine that is in their native language rather than one that's not.

Software

Despite the general economic outlook and the global impact of events like September 11 2001, forecasts indicate that Western Europe's software industry will grow significantly, from a 2000 level of € 56.7 billion to € 109.3 billion in 2005. This represents an aggregate yearly growth rate of nearly 14% over five years, which is dramatically higher than for the economy as a whole, the IMF predicts only 1.2% GDP growth in the euro-zone in 2002, and 2.9% in 2003. The software industry will not only contribute additionally to GDP, employment and tax revenues in Western Europe, but the use of software will raise overall levels of productivity, efficiency and competitiveness for the region's industry. Therefore, one can see the importance of such industry in the region and even the world. In order to remain competitive in this intense market, one needs to plan out strategy carefully and one very important strategy is how to maximise the power of the Internet for one's own organisation.

The software industry is one of the very industries that recognised and adopted localisation practices at an early age. Most multinational software companies such as Microsoft and Novell localise their products into many different languages. They have also adopted localisation in their websites. Due to the fact that the multinational software companies have incorporated localisation their business strategy, they have a clear dominance in the industry.

Therefore, it is evident that in order for companies to compete in this industry, it is necessary to consider localisation, not only for their products but also for their eContent.

Sport & Recreation

Sport and recreation activities are an important part of the way of life in the modern world. Participation in these types of activities is seen to promote health and well-being. During recent decades, sport and recreation has grown as an industry and is now identified as an emerging service industry that contributes significantly to economic growth and to employment.

Sport and recreation may be defined as: “Physical activity undertaken through casual or organised participation, often requiring physical effort or skill, for the purpose of relaxation or enjoyment, expressing or improving physical fitness or mental well-being, forming social relationships, or obtaining results in competition at all levels.” It can be divided into four sectors: sport, outdoor recreation, community recreation and fitness. This industry currently has a huge presence in the web due to the growing awareness of a healthy life style across the world, where people are searching the web for information on sporting activities, either for competitions or as hobbies. Governments have also taken the incentive to promote a healthier lifestyle for their citizen.

Telecommunication

Telecommunications has made it possible for people from all over the world to stay in touch. Telephones, televisions, fax and the Internet have made it possible for people thousands of miles apart to communicate in a split second. The development in the telecommunication industry began with telephone line providers, paging services, mobile telephone providers and suppliers of mobile accessories and services, and later developed to the Internet Service Providers. The emergence of mobile phones once perceived as status symbol is now turning out to be a critical tool for survival both in business and personal life.

The Internet has quickly become an integral marketing, sales, and service channel for the telecommunications industry. The Internet, a very popular communication sector has witnessed rapid growth since 1995. This, coupled with the growing number of Internet Service Providers and the concept of e-commerce which has gripped every organisation and enterprise, has made it possible for companies to advertise their products, provide services and market their goods through the internet. The European telecommunications market accounts for one third of the worldwide market.

Tourism & Travel

Today's Tourism & Travel industry is among the world's largest, currently employing more than 200 million people and grossing more than (US) \$3.5 trillion annually according to International Air Transport Association (IATA). Europe alone has a 48.6% share of the market according to a report by the World Tourism Organization (WTO). Therefore one can perceive the importance of the European presence in such industry. (cf. Figure 1).

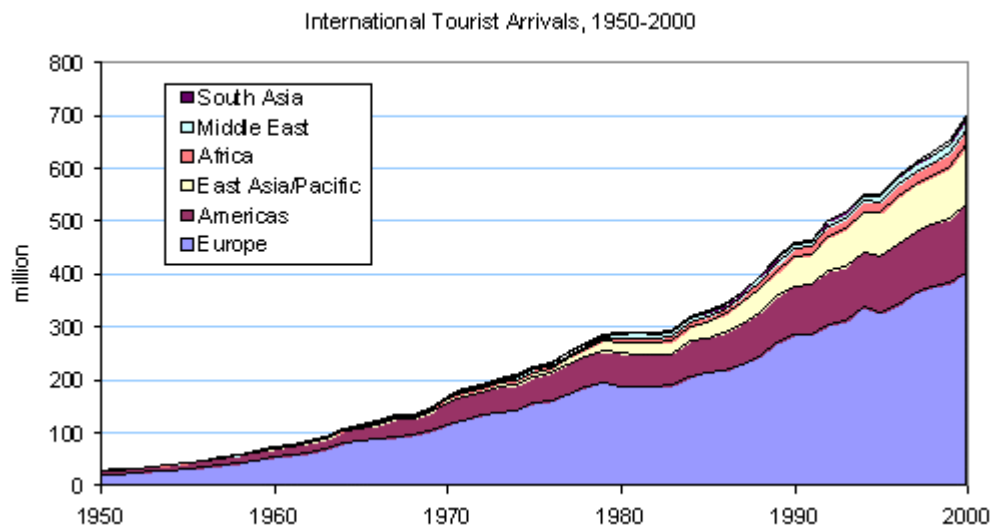


Figure 1 International Tourist Arrivals in different regions, source by World Tourism Organization

Ever since the mid 90's, boom in popularity experienced by the Internet, and the rise in cheap and easy Internet access, the tourism and travel industry has used the Internet to its advantage. For example, different types of companies within the industry are now offering online booking, including airlines, travel agencies, hotels, restaurants and vehicle rental agencies.

In the last few years, the tourism and travel industry has suffered numerous setbacks from events such as the September 11 tragedy and the Iraqi Crisis. In order to attract more tourists into the European region, it is important to consider the strategic approach of the industry.

Although they have the initiative to use the Internet as a marketing tool to attract possible customers, some of the companies have not made accommodations for/foresee the needs of an international audience. Contents of the websites in this industry are generally in English or in the local language. Thus, it would be very frustrating for non-English potential customers to look for information in an English website.

Among of the advantages that Europe has over other regions are the single euro currency and the ease of mobility for EU citizens, as one can observe from the fact that Europe seems to be displaying a formidable resilience in the face of aforementioned crises as is evidenced by the consistency in the intra-regional tourism within Europe (WTO World Tourism Barometer, Volume 1, Nr 1, June 2003). Hence, having their marketing material such as their eContent, localised into the (potential) target languages is necessary to retain their existing market and have the chance to expand into other markets.

eContent service provider

Managing and creating content (either monolingual or multilingual) is rapidly becoming one of the priorities of businesses throughout the world. This provides a wealth of new opportunities for companies seeking to leverage this information to streamline operations and facilitate the flow of information. These service providers introduce tools, strategies, and technologies for creating and publishing content in the digital era. In this report, we have identified some major players in this area (Annex B).

Localisation provider

The missing link between international markets and eContent providers is localisation. This is particularly true for the European players, who can only have the advantage of a large and integrated European market by localising their eContent. In contrast, US players have access to a large monolingual domestic market which generates sufficient profit to expand into international markets.

The basic driver for localisation is, as mentioned in our introduction, globalisation. With the continuing rise of the Internet, the demand for eContent to meet the needs of many cultures speaking many languages is more pressing than ever. Localisation can open new markets and expand the size of existing markets, by making your company more accessible, more attractive and better service. Localisation, therefore, must communicate at the global, regional and local levels.

The health of some sectors of the European digital economy will increasingly rely on the ability of publishers to localise their eContent in such a way that will make their services/products suitable for cross border sales. Localisation is good for Europe and European business, creating many opportunities both to strengthen internal EU markets and for expansion to other regions. However, there is a low level of awareness in some sectors of the nature of and need for localisation (see Figure 2).

English	68.4%
Japanese	5.9%
German	5.8%
Chinese	3.9%
French	3.0%
Spanish	2.4%
Russian	1.9%
Italian	1.6%
Portuguese	1.4%
Korean	1.3%
Other	4.6%
Total Web pages: 313 B	

Figure 2 The distribution of web content by language, as quoted by eMarketer

The cultural and linguistic diversity of the EU can contribute to the EU becoming a centre for world-class expertise, as eContent localisation is already established in Europe where websites with localised content in several languages are relatively common. Localisation should be on the agenda for Internet business development in every company.

This section identified the major players in the localisation industry (Annex C). They are divided into different areas:

- Localisation service provider – companies that provide full localisation services.
- Non-governmental organisation – organisations that promote localisation industry.
- Tools development – companies that develop localisation related tools.
- Translation – companies that provide translation services.

Appendix - eContent Provider

eBusiness

Amazon.co.uk
BarnesandNoble.com
CD WOW!
eBay Inc.

Education

Chelyabinsk State University
Brigham Young University
Universiteit Maastricht
University of Zurich
University of Leeds
Computerlinguistik und Fachubersetzen
Faculte de l'education permanente Universite
de Montreal
Hogeschool Zuyd

Entertainment & Media

Avid Technology Europe Ltd
BBC World Service
Bertelsmann Media World
Deutsche Fernseh Nachrichten Agentur GmbH
The Irish Times
RTÉ

Games

3DO
Acclaim Entertainment, Ltd.
Activision
Atari
Eidos Interactive UK
Electronic Arts
Konami
Midway Games Inc.
Namco
Nintendo
Sega
Sony
Square Enix
THQ
Take 2
Ubi soft
Vivendi

Government/State

Department of Justice, Equality and Law
Reform, Ireland
Federal Parliament of Belgium

National Institute of Research in Computer
Science and Control
Federal Institute for Culture and History of the
Germans in Eastern Europe

Hardware

Amacom Technologies Ltd.
Hewlett-Packard
IBM
Dell Computer Corporation
Sun Microsystems

Healthcare

Abbott Laboratories
AEGIS Ltd.
Almirall
BioPhausia
GE Medical
Hasco-Lek
Menarini Group
Merck Sharp & Dohme (Irl.) Ltd.
Pfizer
Pharmathen
Pliva
Sanovel Ilac san. ve tic. a.s.

Legal & Financial

ABN AMRO Bank N.V.
Bayerische Hypo-und Vereinsbank AG
Barclays Bank PLC
BNP PARIBAS
Credit Suisse Group
Deutsche Bank
HSBC
ING Group
The Royal Bank of Scotland plc
UBS

Marketing

Billets
Carlson Marketing Group UK Ltd.
Euro RSCG Wnek Gosper Interaction
Griffity GmbH
Hill & Knowlton
pH7 Marketing Ltd.
Wellkang Group
Xtreme Information

Non-Government Organisations

Friends of the Earth International

Oxfam
Red Cross
World Wildlife Fund

Search Engines

Alltheweb
Altavista
AskJeeves
Excite Italia
Google
Terra Lycos
Yahoo! UK Ltd

Software

Advent 3B2 Gmbh
Mawell
Mega
Microsoft EMEA
Netquartz
Novell
Oracle
Silicon & Software Systems Ltd.

Sport & Recreation

Rad & Reisen Eurocycle Ltd.
Pyreeneen Pursuits
UL Activity Centre
Westlands

Telecommunication

Ericsson
Expand Networks Ltd.
Motorola
Nokia
Neos
QSC AG
SchlumbergerSema
Sense Communications

Tourism and Travel

Aerlingus
British Airways
easyJet
Expedia, Inc.
IATA
World Tourism Organization

Appendix B - eContent service provider

Algonquin Studios
ART
Attachmate Ireland
Bard na nGleann
Bentley Systems
Bowne & Co. Inc.
Capture Productions Ltd.
Clientside News
CLS Corporate Language Services AG
Docuserve
FileNet
Innovatia Inc
QC Data
QDS
Saturn Fulfilment Services Limited
Sonovision ITEP
Temok
Tridion B.V.

Appendix C - Localisation provider

Localisation service provider

Above Translations	Inter Technical Translations Ltd
Adelink	International Software Products
Akzent Language Engineering, S.L.	Interverbum
Alis Technologies Inc. UK	Iolar Ltd.
Alpha CRC	Japan Bytes Ltd.
Ampersand	Kemper DOC
Ampersand	Keywords Italia
Amtec Translation	Kudos Technical Documentation
ApSIC, S.L.	L&L
Arabic Translations Services	LinguaNet
Arabize	Linguanet Password
Argos Company Ltd	LinguaPoint
ATWords S.L.	LocaliseIT
Bogearrai sa Ghaeilge Teo	Localsoft
Bowne Global Solutions	LocalVersion
Cancio Communication	Locatech
Capture Productions Ltd.	LocTeam
CAT Technologies S.r.l.	Logos
Cedilla Globalisation Solutions	Logoscript S.L.
CIMOS	Logrus
Commit Inc.	MAGIT
Comunicacion Multilingue	Moravia-IT
Concorde Group	Morphologic
Connect Global Solutions	Muh
Context	ORCO S.A.
Delta International CITS GmbH	PH Brink
Diamecs Engineering Ltd	Polderland Language & Speech Technology
Disc Informatica	Rubric
Dtech Translations A/S	RWS Group translate.com
EBM	SAM Engineering
EDITS Deutschland	SDL International
EpiCentre	SimulTrans
Exe	SLS International
ExeQuo	Softrans
Gruppo L10N AITI	STAR AG
HCR	Studio Gambit
Hermes Traducciones y Servicios Linguisticos, S.L.	Syntax Traducciones Tecnicas Y de Software
HiText International SA	Telelingua International
I.T. Alliance Group Limited	Text & Form
	Transline
	Transware
	WH&P

Wordbank Ltd.

Wordhouse

Wordstation GmbH

WORDWIDE.IT srl

WorldAccent

Non-governmental organisation

GALA

LISA

OASIS

SIL International

TermNet

Tools development

Alchemy Software Development

Archetypon

Atril

Atril

Expert System

Language Technology Centre

Lingsoft Inc

PASS Engineering GmbH

Schaudin.com

Softissimo

TEXTEC Software

Trados

Translation

Amidas

Anglo Asian Translation Service

Anthea Translation & Training

Anthea Translation & Training

Celer Pawlowsky

Celer Soluciones

Cretella & Giuliani GmbH

DokuTrans Translation Services

ESTeam AB

Eurotext Translations

Eurotexte S.a.r.l

Glenco - The Language Export Centre

Glotas

Granatext

Icologies

IDEST Communications

International Translation Resources

K International

KJ International Resources

Language Networks

Lingtech

Linguatec Entwicklung & Services GmbH

Linguatec Sprachtechnologien GmbH

Lloyd International Ltd

MTM-Multilingual Translations Management BV

Muegge.cc

PasaNet Oy

Planet Lingua S.L.

Prem Dan

Q Translation

Sail Labs GmbH

Scriptware

T&S Translation

TechText

Tek Translation International S.A.

Tekniikan Sanastokeskus

The Swedish Centre for Terminology

TheBigWorld

TRADECOM

Translation House of Scandinavia

Translation Services Noodi

Unisys - International Engineering Centre

Universal VIP Center

WordFast

Xtra Translation Services

BrisPlan Translatech AB

Linguaserve