

Web site globalization and localization

Case study: A multinational company in an attempt to access the global eMarketplace

Maikki Frisk
Master's Thesis
University of Tampere
School of Modern Languages and Translation Studies
Translation Studies (German)
May 2008

TIIVISTELMÄ

Tampereen yliopisto
Kieli- ja käännöstieteiden laitos

FRISK, MAIKKI: Web site globalization and localization – A multinational company in an attempt to access the global eMarketplace

Pro gradu – tutkielma: 72 sivua, saksankielinen lyhennelmä: 12 sivua.

Käännöstiede (saksa)

Toukokuu 2008

Tutkimuksessa käsitellään www-sivujen lokalisointiin liittyviä valmisteluja, päätöksentekoa sekä yhteisten elementtien ja prosessien määrittelyä. Kuvaan aihepiiriä ensin teoriatasolla, jonka jälkeen vertaan teoriaa käytäntöön. Teoriapohjaan on käytetty lokalisoinnin ja kääntämisen teorioita sekä lokalisoinnin standardoinnin (LISA, Localization Standards Association) ja liikemaailman konsultoinnin näkemyksiä (CSA, Common Sense Advisory), jotka erottavat kääntämisen lokalisoinnin sisällä tapahtuvaksi alueeksi.

Nojaan myös omaan kokemuspohjaani lokalisointimaailmassa. Olen toiminut muun muassa kääntäjänä ja tulkkina, ohjelmistojen lokalisointiprojektien päällikkönä ja osaston vetäjänä, www-lokalisointiprojektien suunnittelijana, www-yksikön vetäjänä, sisällönhallinnan prosessien suunnittelijana tuotehallinnan puolella sekä tuotepäällikkönä.

Työn tavoitteena on kehittää www-sivujen lokalisointiprosessimalli. Tutkimusmateriaalina on monikansallisen yrityksen www-sivujen lokalisoinnin suunnitelma, suunnitelman luonnin pohjana käytettyjen keskustelujen aikana kerätty informaatio, konsultointifirman tekemät yhteenvedot tekemistään kyselyistä sekä oma kokemus suunnitelman luonnin aikana.

Kuvaan suunnitteluvaiheessa esiintyviä ongelmia. Useat suunnittelussa eteen tulevat ongelmat voidaan eliminoida etukäteissuunnittelulla, joskaan kaikkeen ei aina voi varautua. Lokalisoinnin suunnittelijan kannattaa ottaa huomioon eri osapuolten erilaiset lähtökohdat. Erilaiset taustat, esim. tuotehallinnan tai lokalisoinnin parissa hankitut, vaikuttavat siihen, miten lokalisointia käsitellään ja miten koko aihepiiri käsitetään. Pitkälle vieviä oletuksia yhteisestä lähtötasosta ei kannata tehdä. Jo yhteisen terminologian puute voi aiheuttaa sen, että yhteinen tavoite voidaan aluksi ymmärtää eri tavoin.

AVAINSANAT: globalisointi, Internet, lokalisointi, prosessi, sisällönhallinta

1. INTRODUCTION	- 1 -
1.1. Aims and scope of the thesis.....	- 3 -
1.2. Research material and method	- 4 -
1.3. Structure.....	- 7 -
2. THE INFRASTRUCTURE OF GLOBALIZATION	- 8 -
2.1. Globalization (G11N)	- 10 -
2.2. Internationalization (I18N)	- 11 -
2.3. Content management.....	- 12 -
2.3.1. Global content management	- 13 -
2.3.2. Regional and local content management.....	- 15 -
2.3.3. Translation management and tools.....	- 15 -
2.4. Localization (L10N).....	- 17 -
2.4.1. Translation in the context of localization	- 20 -
2.4.2. Web localization process starts with globalizing the source	- 22 -
2.5. Influence of cultural differences	- 23 -
2.6. Global or local presence.....	- 25 -
2.7. Risks	- 28 -
3. THE CASE STUDY	- 29 -
3.1. Scope of case study.....	- 31 -
3.2. Preparation for the initial process work.....	- 32 -
3.3. Research and background for process planning	- 33 -
3.3.1. MOB web sites	- 36 -
3.3.1.1. MOB – The corporate	- 37 -
3.3.1.2. Localization at MI	- 38 -
3.3.1.3. MI.fi procedure and caveats	- 38 -
3.3.1.4. DIGI – Procedure, localization loop and caveats	- 40 -
3.3.1.5. Localization at NE	- 42 -
3.4. Globalization strategy of BI.....	- 42 -
3.5. Fast track localization	- 45 -
3.5.1. Common elements	- 47 -
3.5.1.1. Decentrally centralized content	- 50 -
3.5.1.2. Centrally decentralized content	- 51 -
3.5.2. In-house vs. outsourcing	- 51 -
3.5.3. Process flow	- 52 -
3.5.4. Localization and translation.....	- 53 -
3.5.5. Vendor management – localization vendor and media agency	- 55 -
3.5.5.1. Finding the right vendor.....	- 56 -
3.5.5.2. Localization kit for business and vendor	- 56 -
3.5.6. Roles, responsibilities and communication	- 57 -

4. CONCLUSION - 62 -

5. ACRONYMS AND TERMINOLOGY - 67 -

6. REFERENCES - 69 -

DEUTSCHE KURZFASSUNG

1. Introduction

A multinational company and a company wanting to do business on the web and outside of its own borders has to go global and think local: build a strategy for globalization and processes for localization. The strategy would include identifying and understanding the target market and deciding on the customer segmentation. Understanding the right type of target market needs a new type of segmentation – beyond demographics.

According to Fellenstein & Wood (2000, 77) the four motivators determining the customer segment are: family, career, entertainment, and status. These elements determine the customer base, the target market together with the language, the legislature elements, and the cultural norms as well as customer habits, way-of-living, spending willingness, motivation for purchase and attitude to technology.

Requirements of the target web sites should be gathered and included in the specification to ensure that all locally-driven requirements are taken into account and to assure that all web sites can be shipped or published simultaneously (Viesse 2000b).

Companies sometimes tend to rely heavily on the world being global in a sense that the web users all use and understand – even prefer – English. Even if a person would speak the language, it does not mean that they prefer reading and purchasing complex products in a foreign language.

Language does matter: consumers, who feel comfortable with reading in English, feel more comfortable in purchasing in their own language. Sites in the English language attract people from all over the world but people who do not have English as their mother-tongue, even with very strong English skills, will remain longer on sites in their own language. Time spent on the web in turn correlates strongly with purchases made. The more expensive the purchase, the more likely the potential customers are to turn to sites in their own language, even accepting higher costs. (DePalma et al. 2006a, 3–12, 16.)

Local presence through localized web sites in a local language should gain more customers than a site presented in a single language and with a look and feel so general that it does not appeal to any specific customer segment.

Localization is more than a language difference added on top of the source site or replacing the source content. Internal stakeholders need to be convinced about the necessity of acting global when thinking local: Taking localization aspects into account already at the very first

steps in creating the source site and content and taking the internationalization aspects into account when building solutions or choosing tools for publishing content.

I have been working in the translation business since 1983 when I first started studying translation as a science and skill and gained my first translation and interpretation assignments as a freelancer. During several years, translation and interpretation were my main source of income. I translated various different types of texts between English, Finnish, German, and Swedish. Interestingly enough the customers did not always have a clear picture of exactly what they wanted out of the translations or who they wanted to target with it. Helping my customers to segment their target customers was an interesting job – although sometimes the customer base would be too generic for clear specification, for example the target audience could be “English speaking people”.

In the mid-90s I gradually moved into software localization, working in a company offering both translation and localization services. Software localization comprised all of the steps needed for the software to be adapted in the target market and the target language. Translation was seen as the textual part, the part that needed the equivalence in another language. From what I had been taught earlier, the concept of translation seemed to take a giant leap backwards. Localization would include date and time issues, means for prohibiting truncation, offering support for different character sets and translation, where translation was seen as a change in language.

The latter part of the 90s introduced the world of Internet localization and globalization. The approach towards web localization and translation seemed similar to software localization. In 2000 I moved from representing a localization vendor to the business side. My task was to create a localization plan for the web appearance of a newly-created multinational company. The concept of localization would largely comprise monetary elements: what, when, why, and how the products should be presented to obtain as many customers as possible? Translation was a language difference, not really thought of as being important in the planning phase or crucial for the product creation – it was an afterthought.

To be able to plan better for web localization and globalization as well as to understand both the business and the vendor side within a localization process, I have familiarized myself with the theories and practices of localization, translation, globalization, and content management. I have studied relevant literature, publications and also attended several localization, globalization, and web content management seminars around the world – both as a participant and as a speaker. I have several years of experience both in the world of translation, localization, globalization, and content management and during those years

I have had a number of interesting discussions with representatives of companies offering localization and content management services as well as their clients. My roles within having been an independent translator, and my various roles from a translator, through project manager to department manager in a localization company as well as the latter roles on the business side as localization and globalization manager, web operations manager, vendor manager, content manager and product manager have all brought different perspectives to the subject matter.

For information about best practices and common behavior in the globalization and localization business, I have familiarized myself with Common Sense Advisory (CSA) publications. CSA is a research and consulting firm well known in the globalization, translation, and localization industry. In addition to this I have studied publications from the Localization Industry Standards Association (LISA) and familiarized myself with literature and best practices related to e-commerce and e-marketing.

The whole experience of having seen different angles and perceptions of translation has been extremely eye-opening. From having started as a translator and perceiving translation as a special skill – almost an art form, where a message had a specific scope and was transferred from a source culture to the target culture, through having experienced translation as a language equivalent within localization, to where localization meant creating a local equivalent of a product in an environment where localization was seen as a set of business rules.

1.1. Aims and scope of the thesis

In this thesis I will shed light on the principles of globalizing and localizing a web site with the help of a case study and benefiting from my own long-term experience within the web globalization, localization, and content management industry. They are all fascinating elements in web publishing, not least due to the variance of terminology and understanding of the entities and sub-entities.

Terminology within and the concept of localization and globalization is perceived somewhat differently between various audiences. Therefore I will give the central terminology: globalization, internationalization, localization and content management extra attention. I will explain the concepts of globalization, localization, internationalization, content management and translation tools as well as the need for workflows and roles. It is good to understand cultural differences to avoid too distinct cultural elements especially in the source material.

This thesis is about issues around web site localization; software localization is mentioned due to its strong connotation especially in the origins of the word.

I depict the decision process of a multinational company offering security solutions. I will explain the initial assumptions and the initiation of the process and make observations during the creation of the original globalization / localization plan. I will shed light on many of the thought processes that have led to the chosen routes as well as obstacles of a typical multilingual company striving for global appearance and business.

A company aiming to establish local presence might not be aware of the obstacles they will face during planning and the continuous work involved in a localization process. Business (the people working on the business side) might have a picture of an outcome but no real expertise or plan on how to get there. Localization as a concept is typically not understood similarly by different parties within the organization and people involved in the various tasks and processes, but rather the meaning will be influenced by the responsibility and status of the person or organization in question.

Along with the varying perceptions of the terminology and uncertainty of needed elements, one can only assume that the process of localization is not a straight-forward matter: a clearly defined, existing piece of a puzzle to be implemented as such in any area that needs local appearance.

This thesis is targeted for web localization professionals and companies dealing with web globalization and localization issues. I hope to shed light on the problems one faces within the thought and planning process to experts within the field of translation science. I am looking at the dilemma from the perspective of a product and service producing company. Tasks related to localization or translation vendors and the translator's work are briefly discussed.

1.2. Research material and method

I will investigate and depict a solution for web site globalization and localization at a multinational company with the help of a localization plan created in a company producing Internet security solutions. This solution will act as guidance during web site localization process creation. I created the original plan during the months of August through November in 2000 to satisfy the emerging needs of a B2B (Business-to-Business) company to expand its multilingual web presence. The plan and the planning process as well as the personal

experience during the creation of the plan are used as the main research material in this study. The study touches on matters before, during, above, and after the written plan itself.

The plan was built on material gathered from marketing managers by a consulting company and during several face-to-face discussions between marketing, eBusiness, web specialists, and myself. It is also based on my own experience within the localization industry and on experience gathered during localization and globalization conferences.

During the creation of the thesis I relied both on the actual plan, the experience during the creation of the plan as well as the discussions mentioned and the material created by the consulting company.

The research material, the globalization and localization plan, consists of the globalization and localization plan of a company providing Internet security solutions. The elements that were part of the plan will help in understanding the scale of it. The elements were revisited as supporting research material for this thesis. All of the decisions reached within this case study refer directly to the globalization and localization plan (Frisk 2000g). The globalization and localization plan was influenced by and combined with the information of the elements listed below. In areas where applicable, this sub-material is separately highlighted in the case study and also listed in the reference material list:

- A presentation compiled of questionnaires was sent to the local marketing and online managers. The questionnaire was created by a consulting company (Satama); they were structured and targeted to understand what elements were seen as important for localization on a country level. Marketing managers were asked about their specific needs and preferences for localizing the web sites, for example which elements around the product and in regards to the general corporate web site they would see as most and as least relevant to be presented locally – and in which language. This information was gathered via questionnaires in an Excel format document, combined as a PowerPoint presentation, and handed over to me. The original questionnaires had been created and sent to marketing managers by a consulting company to the interviewees by e-mail during July and August 2000. The interviewees, 6 local marketing managers (Sweden, Finland, Germany, Denmark, France, and UK), initially represented the fast track localization countries and marketing management. For the final planning, the summary of the questionnaires acted as guidelines, details about the countries and elements to choose were agreed upon between the marketing managers and I in recurring meetings see next section.
- Needs and capabilities of BI stakeholders, mainly the marketing and online managers (8 local representatives (Sweden = 1, Finland = 2, Germany = 1, Japan = 2, France = 2 and UK = 1), 5 online managers (2 in San Francisco and 3 in Finland), eBusiness director in San Francisco). The EBusiness director was responsible for the unit, marketing managers for their respective

local market and online managers were global, operational employees. It was imperative to understand the requirements for the web sites, the overall capability of the marketing managers to maintain their respective site or sites as well as the global resourcing situation. These interviews were unstructured because I did not want to restrict the discussion area in any way – rather understand the whole picture and then draw my own conclusions based on the meetings and the conclusion of the questionnaire handed over to me. The first face-to-face and one-on-one meetings with the marketing and online representatives and the eBusiness director mentioned were held during August and September. I refined the conclusions further in weekly meetings, which were conducted even after the initial plan was finalized. Meetings following the initial face-to-face meetings were group meetings with all marketing managers and online representatives present and took place in Tampere, Espoo, Nokia, Stockholm, San Francisco, Singapore and Tokyo. I will refer to the marketing and online managers mentioned within the case study as “marketing and online managers”. For discussion material to refer to during the meetings I created two presentations depicting the existing situations (Frisk 2000b, 2000c).

- Models used within the Corporation and its companies: the Corporation had several simultaneously ongoing models for web site localization. To understand the chosen models I had interviewed the key people involved in those processes. The interviews were unstructured and based on discussions to understand the processes used. I wanted to understand the existing processes to see if the company already had existing models that BI localization process could benefit from. The face-to-face interviews were held in Espoo during August and September. The interviewees were identified as the owners of the chosen sites. (MOB = VP of marketing, MOB.fi = online manager, DIGI = localization coordinator, NE = online manager and Web Book 2 = head of corporate e-Marketing, corporate development manager, corporate content manager as well as BI = local marketing managers.)
- Comparing existing local BI web sites. The comparison was informal and mainly served to give a general understanding of the existing situation. Details were gathered in the meetings mentioned above.
- Studies ordered by the example company during the first half of 2000 for the particular purpose of creating local appearance, such as general localization approaches used by competitors and by other companies with local presence. These plans gave supportive information to the direction that should be taken during planning and are embedded in the main reference material (Jupiter 1999). For the globalization and localization planning I summarized parts that I felt important for the planning (Frisk 2000a).
- Analysis of existing web sites and ROI calculations against the Trados translation tool and memory usage.
- Conferences attended to understand details of current localization and globalization trends among other businesses (such as LISA and IQPC). Especially the Microsoft localization plans which were presented at IQPC conference in New York in 2000 made an impression and influenced some of the reasoning regarding centralized and decentralized models and simultaneous shipping during the planning phase.

- Own experience within the area of translation since 1983 and localization since 1996, responsibilities and roles, such as translator, localizer, localization project manager and software / web localization and testing department manager on the vendor side.

I had interviewed the example company's stakeholders: marketing managers and eBusiness management to gain a general understanding of their targets and goals for the local sites in their territories. Analysis of commonalities and differences derived from the interviews serve as a basis for the suggested steps. The suggestions are vetted against general approaches and against my own experience in the localization, globalization, and content management world. I used my previous experience to pull all the information together and come up with recommendations within the plan.

The approach of the thesis is empiric-analytic.

1.3. Structure

The first part of the study – aside from the introduction, scope, material, and methods - concentrates on the related terminology: globalization, internationalization, content management, localization, and translation as part of localization.

I will describe common elements within a localization process when globalizing a web site, such as the relation between globalization and localization, the benefits of a global localization approach and of global / local presence. I also list typical risks that I have in a localization process.

The second part concentrates on the practical case study, investigating and describing the chosen routes with a reflection on the theoretical assumptions.

As part of the case study, I will describe the initial situation of the example company's web sites and examine the target audiences and priorities. We will take a look at some solutions that were already in use within the different parts of the whole corporate organization and discuss roles, requirements, processes, vendor selection, and overall risks.

2. The infrastructure of globalization

In this chapter I introduce the infrastructure of globalization, discuss translation in the context of localization and introduce viewpoints on how a web localization process starts. I will also mention cultural differences, introduce reasoning for choosing local over global presence as well as discuss some basic risks one may face when planning web site localization.

I see the globalization infrastructure as a technology platform with a complement of services that enable a company to efficiently manage the critical dimensions of the globalization process. I divide them into four main areas:

- Globalization
- Internationalization
- Content Management
- Localization

A complete globalization solution provides an integrated suite of technologies and services that can address the challenges in each of the dimensions of the globalization process. Content management is an important element within this process – and the other way around, localization, globalization and internationalization are vital elements of the global concept of content management.

Information life cycle, knowledge management repository and the whole content architecture play a big part in enabling the seamless flow. Even though many of them are easy to incorporate in a content management tool, integration work is still required. Translation tools should be easily hooked into the content management system when delivering to several countries. (DePalma & Joscelyne 2005, 10, 12, 13–17.)

A localization infrastructure must provide a way to easily manage the process of adapting content. The real challenge of cultural adaptation / localization is not the adaptation of the content itself, since there are many translators and translation houses that can provide such services, but to identify the means to rapidly and efficiently manage the process. An important part of the process and workflow creation is the whole concept of managing global

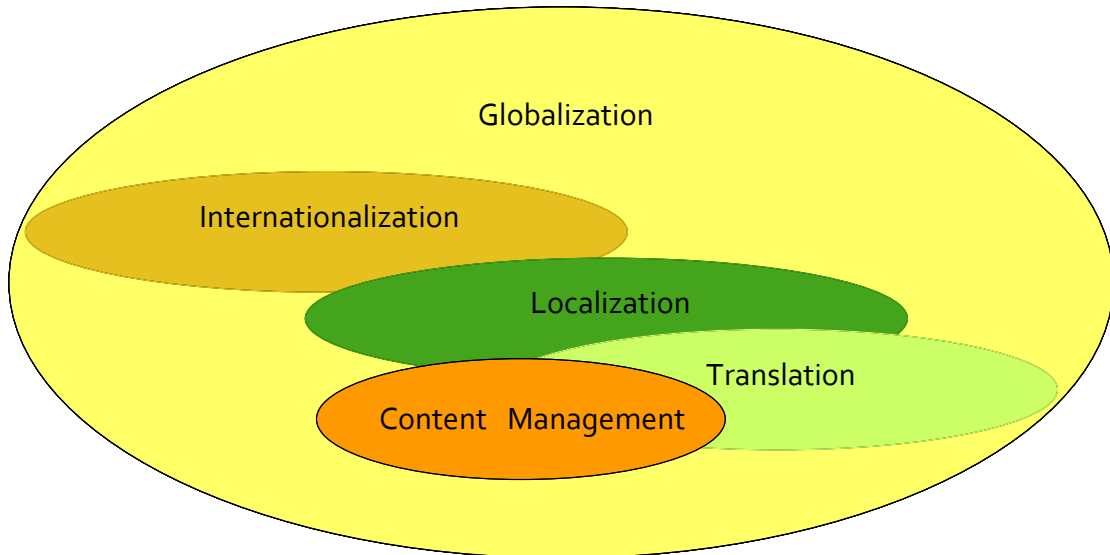
content and how the globalized operations – both within and outside the technical environment – are organized (DePalma & Sargent 2006b, 1, 3–8).

To enable localization, the platform will need to be internationalized. Lommel reminds us that if a product has not been internationalized during the development phase, localization can be expensive to the point that it will not be economical (2007, 11). The economical aspect in a case like this presents a difficult dilemma of choosing whether to ignore a big part of the existing and potential customers or to recreate the product frame. In software localization it would mean creating a profound maintenance release of the software. To enable web site localization it would mean replacing servers, systems and tools as well as the recreation of the source web site itself.

There is an interesting comparison to car manufacturing explaining that having the steering wheel on the left side in Japan and the UK of a US-made car is localization. If however somebody came up with the invention of offering the possibility for the customers to slide the steering wheel from left to right according to their own preferences – this would be called internationalization.¹ Globalization in this particular context would be the initial idea of enabling this type of, I will call it personalization, in the first place. It seems that internationalization elements are of a more sustainable nature. Once created, they are not easily changed. The term internationalization is typically used in the software industry.

The following picture depicts how I perceive the relation between globalization, internationalization, content management, localization, and translation within web site globalization. I see globalization as the frame that incorporates internationalization, content management, and localization including translation. For an optimum result they are all interlinked and interdependent:

¹ This comparison is presented by Luong et al. (1993, 1-10); Hoft (1995, 11) and Lommel (2007, 11).



Picture 1: Globalization, internationalization, content management, localization, and translation

2.1. Globalization (G11N)

Globalization is the first step of the entire process of publishing multilingual web sites.

LISA (2008a) about globalization:

Globalization is the process of preparing your organization—at all levels—to do business internationally.

The process of making all the necessary technical, financial, managerial, personnel, marketing and other enterprise decisions necessary to facilitate international business.

The creation of a linguistically and culturally neutral framework is the first critical step in the globalization process – it can largely be described as a psychological process. When creating a web site, it is practical to consider the global aspects at each step when planning personalization and changes in the original web site profile. Globalization involves designing an eBusiness framework or web architecture that is “culturally agnostic”. At the beginning of

the century, when web applications were first designed they were typically designed to support English. (Viesse & Freitas 2000a.)

Fortunately, this has changed, at least to some extent, since globalization has reached a more mature level and localization has turned into a forethought rather than an afterthought (Burton Group 2006, 19).

The term globalization is typically used when discussing procedures for creating multilingual web sites. Globalization takes the aspect of thinking globally about the target markets into account. Globalization is not to be seen as targeting all language or country sets with a single message. Instead it is about creating a common platform: globalization combines the commonalities that the target languages have and thus simplifies the localization process.

2.2. Internationalization (I18N)

While globalization takes the aspects of the target market into account, internationalization is about the technical core. It could be described as the part that is constant, as in incremental parts of the back-end, software, server and the whole infrastructure used.

To Hoft a product with internationalized information consists of core information, which would be the information that does not really change, for example product description, and international variables, meaning information, which has dependencies with the target locale (1995, 19–22). Internationalization has to be done well and to the point from the beginning. If there is even a small part of the whole system or architecture that is not internationalized, the system will not work. If a company wants to change an ASCII-based system to support double byte, it can easily take up to a year (Cadieux 2001).

At Multilizer, a software localization company, internationalization is seen as processing, rather generalizing, the software for it to handle multilingual and multicultural environments and conventions. Simply put: separating text from the source code. Preparing for this process requires some pre-work, for example enabling support for foreign keyboards and avoiding fixed date, time, currency, or number formats. (2001, 29–34.)

Internationalization is sometimes confused with localization outside of the very core business of internationalization and localization. Where internationalization provides the framework and structure for localization to take place more efficiently, localization is seen as the process of targeting the product for a local market by translating the product in question and in

addition to the translation locale specific features are added. Pym (2004b, 30) notes that internationalization and globalization are sometimes used to describe the same connotation.

LISA (2008b) defines internationalization as follows:

Internationalization encompasses the planning and preparation stages for a product in which it is built by design to support global markets. This process means that all cultural assumptions are removed and any country- or language-specific content is stored externally to the product so that it can be easily adapted.

Internationalization can be seen as a part of globalization. It is about creating a technical environment that meets the needs of different locales, and can be used universally, regardless of language and character sets.

As a summary I would say that internationalization or “localization enablement”, as Pierre Cadieux (2001, 19) calls it, ensures that the tools are enabled to process the target needs of the languages, and cultures within; as DePalma and Joscelyne (2005, 2) mention: internationalization precedes localization and translation.

2.3. Content management

Content management has been listed as a software category since the late 90s. The early steps of content management were taken hand-in-hand with localization and internationalization. The content on the web sites has grown exponentially since then and so has the amount of problems. The amount itself is not a guarantee for better content, nevertheless the content needs managing including reviewing and archiving capabilities. A good search engine can help users find content but it has become more evident to companies providing web sites that a proper web content management system is needed to satisfy their growing needs for quality and timeliness. (CMS Watch 2007, 3–6.)

When a company has made the decision to create a web presence, they will next face the question of how to manage the content. The content can be managed on several layers, for example globally, regionally and locally. Hall & Moore (2001, 6) mention the need to include a web content management system early in the globalization and localization planning stage; it is seen as fundamental for any globalization and localization strategy.

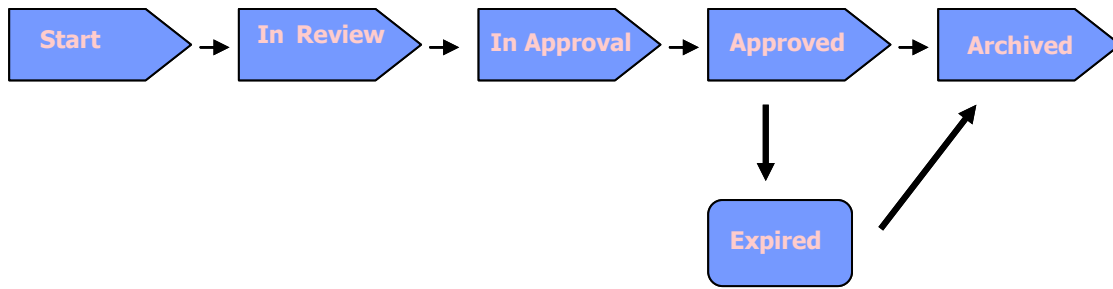
Planning content management hand-in-hand with the globalization and localization process will ensure that the requirements for the content flow throughout the various areas and countries are taken into account already in the beginning. Sometimes content is managed with the help of a content management solution, which can comprise of workflows on different levels: global, regional, and local. Within a content management system review steps, archiving and roles can be taken into account automatically.

Depending on the amount of the content to be managed and also on the openness of the people involved to embrace new toolsets, content can either be managed using an off-the-shelf solution or it can be managed more or less manually through pre-defined roles and responsibilities.

2.3.1. Global content management

Hoffmann (2000, 59-65) discusses "Multilingual Information Management" and "Information Objects" in conjunction with product documentation and information sharing in the web era of sharing information through tools and portals. She distinguishes the new type of product information between "Documentation integrated into the product", such as online help "Information-intensive products", which is basically product information for technical products and "Convergence of now distinct types of documentation and means of distribution", which is about the changed information sharing and offering methods. The "now" refers to today's usage of intranet and extranet as opposed to more traditional methods, such as client-specific communication channels. Information objects have to be designed, stored, managed, consumed, and updated in a pre-defined way.

If a company chooses to use centralized or global content, it is my experience that the source content should be managed so that its approval process has been clarified and is visible to all parties involved. Pre-defined roles and a set of rules for the tasks for example expiration and archiving will take care of each part of the flow, as in the following example of a content flow:



Picture 2: Content management lifecycle

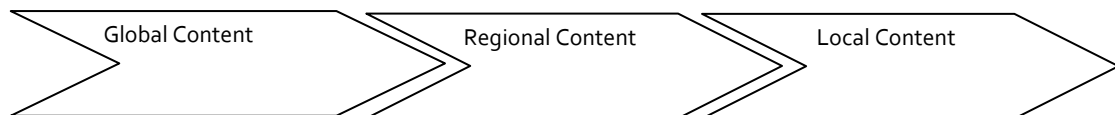
By roles I mean the people responsible for the certain tasks mentioned in the example flow. Pre-defined roles are important for ensuring up-to-date and accurate information published on the web site(s). Global content is the source for the regionally and locally used content and, in my experience, for it to be successfully shared it should be visible to all regional and local roles during its lifecycle.

From the experience of having been involved in many operational web processes, I would say that in web merchandizing it is typically up to the regional and local marketing people to choose from the pool of global content. Some of the content can be mutually agreed for automated usage within regions and countries i.e. automatically forwarded to localization or translation. The rules for content workflows are pre-set; in some cases automated emails are triggered to inform participants when content moves from one step to the next. A separate workflow can be created for global content that is not automatically applied to all regions and locales but might be used by them on demand. This content would not be automatically forwarded for localization or translation – instead it would be up to the regional and local employees to decide on the usage of such content. It has been my experience in the content management world – creating content management solutions and processes for companies – that a workflow is only successful when all roles are pre-discussed, pre-defined, and allocated. The usage of the workflows will only be successful if they are created for the identified need – as opposed to using a set of general workflows or workflows borrowed from another context.

2.3.2. Regional and local content management

A multinational company's product range and organization can be divided between global, regional, and local. Global within web globalization and localization business is equivalent to source. Regional would typically derive from geographical entities such as territories, areas, and continents. We might be talking about Europe, North America, South America, Asia, and Africa as separate territories or of a combination of some of them. What they usually have in common is a product range targeted to the specific region. The product range would differ in larger aspects between the territories and in smaller aspects between the locales or countries. Regions are often divided into areas and countries. Some countries might be bundled into areas due to the very similar target market, for example Benelux.

A company might have regional representatives, which in the case of web localization would be the first internal contact point for the global content. The second level counterpart – depending on the division of the countries – would be the territory, area or the country responsible. As mentioned earlier, all content would flow through predefined channels, starting from the global content flow and ending at the local content flow. Content can also derive from the regional level or be purely local with no reference to other countries. Whichever flow or flows are chosen, in my experience they should be pre-defined to avoid chaos. The following picture shows the depicted order of content flow:



Picture 3: Content flow

2.3.3. Translation management and tools

Studies show that timing is a critical differentiating factor when attempting global markets. Processes should be as automated as possible to avoid inconsistency, and manual work, which only slows the processes down. The ideal situation for many companies would be to

have all language versions shipped at the same time, although sometimes the business market situation might affect the simultaneous launch and the launch would be delayed intentionally in chosen markets. (DePalma & Beninatto 2008, 11–12.)

I have experienced that bigger companies typically have standardized terminology in some parts of the organization but the synergy often does not apply for all the different units. This terminology should be harmonized and used across all units to prevent confusing the customer. In the localization projects that I have been involved in, glossary creation was one of the first tasks, especially within software projects. This is also listed in the early phases of Esselink's localization project process (2000, 17). Creating and maintaining a glossary ensures that the terminology is consistent. This consistency helps in tracking localization and re-usage of translations when a translation memory is used during the translation. The tracking can be easily taken care of with commercial translation tools, through implementing glossary creation and maintenance using a translation tool, which has the capability to create a translation memory (TM).

A multilingual repository / translation memory stores all content that has been localized. This content can be leveraged across all future projects, by using an automated comparison to compare new content against previously localized content. By reusing previously localized content, a company can speed up the process and ensure simultaneous shipping, reduce translation costs and achieve consistent translation, which is a very difficult, rather impossible task for purely human-based translation². There are several companies that specialize in creating tailor-made solutions for multilingual localization³

Many translation software companies offer translation memory tools. As early as 2000 there were already a number of firms providing translation / localization / globalization software which would support multilingual translation, including SDL, DejaVu, Uniscape, GlobalSight, Multilizer, and Idiom. After the initial growth, there was a period of consolidation, ending with SDL's acquisition of Trados. Since then a bigger wave of companies has appeared (Sargent & DePalma 2007b).

In the early stages of developing translation management solutions (TMS) they were easily confused with the content management solutions – sometimes even intentionally. The goal might have been to raise the status and bring them onto the same level or even subsidizing the content management solutions. It soon became evident that translation management systems would not reach the level of process management required but would instead

² See also Multilizer (2001, 13) about translation memory usage and Rogowski about SDL usage at Philips Electronics (2006, 2).

³ See also Lommel (2007, 38) about the usage of a translation memory.

complete a global content management system as an extension or part of a CMS (content management system) in adding project management features specifically for translation. Similarly a mere CMS solution could not support all the elements required for successful translation management. (Sargent & DePalma 2006, 7–8.)

2.4. Localization (L10N)

If globalization takes the aspect of thinking globally about the target markets, localization concentrates on fulfilling the local needs and ensuring a locally relevant presence.

The definition of localization has only become clearer during this decade. In the 90s when localization was still a very new term, the conception was not unanimous and not even very clear. This is discussed by Dunne (2006, 1–4) in comparing perceptions of the term localization of publications from 1995-1996. Dunne (2006, 4) uses as the “working definition” for his publication the following definition for localization:

The processes by which digital content and products developed in one locale (defined in terms of geographical area, language and culture) are adapted for sale and use in another locale.

He mentions Esselink and Pierre Cadieux as the sources of his formulation (2006, 3–4). According to Dunne the definition of localization depends on the messenger; the perspective is largely determined by the nature of the stakeholder and their position within the company (2006, 1–3).

Based on my experience in the localization area, from the perspective of a localization vendor, I would say that the basic definition of localization especially in comparison to translation seems pretty unanimous and leans towards definition of the localization standardization association (LISA). Working on the business side has added the aspect of return on investment. This is also discussed by Dunne (2006, 1). To me the biggest differences seem to be between the product business (product business as opposed to localization business), localization business / industry and translation theory / professionals.

For Pym, translation is part of localization if not a synonym. He discusses translation and localization in his publications comparing the meaning of those terms. The description of

localization fits the description of translation. Translation is not just about language but about adapting source information into the target surroundings. (2004a, 2004b, 2006b.) Pym notes that many translation scholars wonder whether localization is a new word for the tasks that have been part of translation for a long period of time, with an added highlight on the technological side (2004a, 2).

Localization has its own industry body: LISA, on which many of the experts rely, for example Esselink (2000, 2–4) bases his perception of terminology related to localization, internationalization, and globalization directly on LISA's standards. Logically this has not always been the case. In the early stages of localization, the term would have caused quite a lot of confusion – but isn't it always the case with new terminology? When digging deeper into LISA publications, it turns out that they touch on the subject by stating that localization is often treated as “high-tech translation”, reminding us that this perception is misleading and neglects to take into account the complexity of localization, its relation to the business processes and to globalization. Localization process impacts both technical and business processes – from design to reporting. (Lommel 2007,11.)

Also Pym (2005, 1) quotes LISA standards wherein “Localization involves taking a product and making it linguistically and culturally appropriate for the target locale (country / region and language) where it will be used and sold”. Pym (2006a, 1) refers to localization as a term used in the fields of product documentation, web technology, and software:

We use the term “localization” to refer to a general set of discourses informing cross-cultural text production and adaptation in the fields of software, product documentation, web technology, and some international news services.

In the localization industry, the word localization was first mentioned in the connotation of software localization. Web localization is a later arrival yet similar rules apply. Properly localized software allows the user to concentrate on the software itself instead of having to use up their energy in trying to understand the words of the foreign language (Uren et al. 1993, 1–5). Within the localization industry, certain elements are regarded as part of localization or supporting internationalization, as an example Lommel (2007, 17):

- Graphics may contain embedded text that must be translated.
- Screenshots may appear in a particular language.
- Phone numbers may be usable only in one country.

When localizing a web site, localization refers to adapting a web site and its content – even a tool to meet the language-related, cultural, and political expectations of a specific local country or market (Viesse 2000a, 4). I have experienced that product management has to make the early decision of what, where and when to localize as opposed to localization business management, which receives this part as given. Product management, in turn, is not involved in the actual translation process but receives the target material for internal inspection and approval – the approval rules follow the business rules. The set of business / marketing people originating the task might be different from the ones receiving the translated matter.

Web content localization supports different character sets, language, and cultural factors as can be seen in the listing of Hall & Moore (2001, 2):

- Color: Many cultures have preferences and / or dislikes for specific colors, and color sometimes has political, religious or ethic overtones that may make colors undesirable for content presentation. For example, Korean and Japanese consumers may feel slighted by the use of red and gold, which is typically used for Chinese audiences.
- National symbols: Using the outline of a country's border or flags may be problematic if there is, for example, a border dispute between nations or a political issue over the use of these symbols.
- Translation: There are many classic examples of marketing terms that are problematic when translated into another language, such as when Kentucky Fried Chicken introduced "finger lickin' good" in China (which meant "eat your fingers off" when translated).
- Choice of words: Simple words or phrases could be undesirable, such as extensive use of the number "four", which signifies death in Asian numerology.

To me localization involves the process of adapting linguistic and cultural content to specific target audiences in specific locales, i.e. specific linguistic, cultural and business rules for a given target audience. Localization can be seen as a form of cultural adaptation: French, as a language, is different in France than it is in Canada, as are the currency, legal issues, moral perceptions, and business rules. Similar adaptation happens in the translation, which is also typically combined with adapting to a certain cultural frame. Software localization

looks at translation as a part of it in the big scheme of a pre-dominantly technical frame. Web localization – in my experience – would typically look at translation as part of localization within a technical and even more so, a market oriented, market segmentation frame.

Localizing a web site is a means of showing respect to a potential customer – and to the customer's language and culture. It is a way of demonstrating that the company wants to provide good customer service. For marketing and sales, localized content also serves as support material by being a "black and white" online version and a reminder of what the customer has and should be told – and in which country.⁴

When a company producing products or services plans localization, they look at localization from the perspective of what needs to be done to satisfy the local customer. In this thesis, localization is understood from web localization perspective: in this concept, localization starts with defining the customer segmentation and understanding the target market the product is aimed at. Localization involves understanding the local market, the locale and reforming the original web site to seem as if it had been created just for the local purposes. It will comprise local cultural norms and local business norms, including for example currency and legislative issues.

2.4.1. Translation in the context of localization

This section will discuss some of the similarities and differences between the term translation and localization depending on the discussion forum: translation scientists, laymen in relation to translation, translation offices, localization vendors, localization industry and people on the business side.

Translation has its roots very far back in history as Dunne (2006, 4) mentions– and according to Biau & Pym (2002, 6) the first translation schools were already established in the ninth century – whereas localization, internationalization and globalization are terminology raised with the growing IT technology during the last two decades.

Translation within software localization can be divided into translating files, indexes, collateral material, and documents. During translation of these files a translation memory is built and every translation undergoes a validation process. All these translations are part of the final localized product. Without the translations, the software product would be a hollow shell, readily enabled for local markets – but missing the textual content, the translation. (Esselink 2000, 303-320.)

⁴ See also Susan Cheng (2000, 31) about obstacles and considerations between Japanese and American culture.

Pym worries about the seemingly declining meaning of the very essentials of the term translation in regards to localization. Translational equivalence belongs to history, to the 1960s and 1970s, although it seemingly had a small up-turn in the 1990s – along with the rise of the localization industry. Today translation can be seen as a larger set of tasks including summaries, revisions, producing completely new texts. In this field seeing translation as the equivalence of natural text strings is far fetched. (2004b, 54–55.)

In my experience localization on the business side tends to be seen as the plans, the act and the processes fulfilled on the business side and usually by the business whereas the chores executed by a “localization vendor” are seen as translation. Unless they involve preparing the original software or web site, in which case the localization vendor is seen as taking care of part of the localization process. In this perception localization would comprehend the tasks performed on the target information whereas translation is predominantly about the act performed on the source information with the aim of producing information fitting into the target market; if translation against this perception is interpretation of the meaning, localization would be putting the entire entity into a local context. The entity would (in our example case) comprise the sellable local product, the local product marketing, the marketing info and the environment in which it is visible. The preparation of the local product and product marketing would abide by local business rules. The translation includes the more language-oriented local rules.

Within the business processes involving localization and translation I have noticed that the actual translation of text is taken into account only in the very last steps of this type of localization process. It appears to be thought of, not as part of localization, but rather as something that comes after the localization process: the language part. Speaking from experience from working both at a localization vendor and on the business side, translation – in this frame – is seen as the language part. This will not diminish the meaning and broadness of the term and theories around translation as a stand-alone subject; I cannot stress enough the matter of perspective and the viewpoint.

I see localization as placing a product into another market, in this case, through the web. Elements, such as special character support, local marketing customs, order of sorting, symbols, cultural norms and currencies / pricing enable the publishing into a given locale. In this frame translation is about the language. This thesis is not taking a stand as to what translation is but is touching on the subject to understand how it is perceived in the frame of software and web localization.

2.4.2. Web localization process starts with globalizing the source

This chapter discusses the fundamentals of a typical web site localization process.

Localization of a web site should in my experience not start with the act of localizing but rather with the bigger concept of understanding the elements needed within the creation of the source site when planning to have a global site or local sites: with the definition of the global frame.

If a global web site is intended to address a multicultural audience in multiple countries, the look and feel should be as general as possible: cultures and countries have different norms and when the source is culturally agnostic, it is easier to use it further as a frame within subsequent countries. Many companies, especially with corporate customers, will rely on an English only site with culturally agnostic elements (Sargent & DePalma 2007a, 9).

When there are plans to localize, the creation of the source has to undergo a global mindset so that it can address the local needs from a business, market, and ideological perspective to the best extent possible. A well-globalized site is easier to internationalize and localize – because the scope of all the locales was kept in mind: why do we want to go local and what are the countries, and languages or rather locales to localize into. If and when taking locales into account, this would result in a company going local by going global.

Globalization will have to be carefully planned, taking all internationalization and localization aspects into account. To be able to take all aspects into account, one needs to understand the concept of internationalization and localization. Globalization will affect every level of business and so becomes the core of successful multinational business. Globalization and localization ought to be planned in and treated as cycles. (Lommel 2007, 19–20, 25–28.)

A successful globalization strategy will enable customers everywhere to have access to equally high quality information regardless of their cultural background or location. It will support an individual in contacting a company and its products relevant to the individual's cultural and linguistic background.

Karjalainen mentions an interesting notion about how traditional businesses have to come up with new innovative ideas to attract customers and stand out among the homogenous field of product offerings. Companies are competing with secondary attractions such as atmosphere and improved on-site customer service. (2008, A3, D1–2.) To understand what the customers want and what would influence their decision-making, the customers need to be seen as individuals – as far as possible. This starts with understanding the difference between cultures and languages.

Web pages are updated on a continuous basis. Depending on the focus and nature of the site it will be updated monthly, weekly, daily or even more often than that. The site's update frequency should be well-planned and communicated amongst all parties involved. In order to ensure full customer service and satisfaction, all new products should be launched simultaneously. Simultaneous launch (also called simultaneous shipping or sim-ship) means simultaneous update of the product information on the local web sites. Giving the false impression of preferring one area to the other through unsynchronized publishing of updated information is not ideal customer service. Simultaneous shipping is an increased demand deriving from marketing. According to Lommel the only way for a company to succeed in the market is to ship simultaneously (2007, 0, 25).⁵

To me a multinational company's local website presents the living face of the company and as such a living face of the whole corporation. According to internal studies ordered by the company discussed in the case study it is also the most likely daily contact point to the majority of its customers.

Globalization is about the global frame, about finding, and identifying commonalities that can be used as a source. I have noticed that globalization can sometimes be perceived as a negative word, a bit like centralization. Local representatives in a company can sometimes be a bit reserved towards attempts to centralize and globalize – being afraid that it might disarm them, rob them of their power.

2.5. Influence of cultural differences

If we want to address and achieve customers, we want to make sure that the visitors feel at home and that they can relate to the information on the site as well as to how it looks and feels.

In a very broad sense culture is everything that makes us feel alien in a foreign country. Society and culture form the basic terminology for cultural anthropology. A society is formed by a group of people who are drawn together by the same living environment and the feeling of togetherness. Culture and society are interdependent and therefore can only be understood through each other. There is no culture without society and no society without culture. (Alho et al.1996, 31, 75.) The cultural footprint is dominant in individuals, it is often tightly integrated with the language but also with the territory, the country, and even the

⁵ See also Suzanne Topping (2000, 111-125) about shortening the translation cycle and simultaneous shipping.

neighborhood where the individual has been brought up or spent much of their time. This can be seen clearly in areas like music; music is not only very local in the meaning of a country or part of the country, but also from a city or even a neighborhood point-of-view, especially in bigger countries like Great Britain or the United States, where for example a certain hip-hop sub-genre can be identified to a block in a neighborhood.

Language is part of its culture and cultural differences are touched on by many translation scientists and theorists.⁶ Ammann mentions individuals growing into languages, whereas Vermeer discusses collective culture specific experiences, which result in traditions and conventions – individuals grow directly into a certain culture and accept its views and assessments. These people are culturally and linguistically socialized. Our behaviour is partially determined by the culture we live in.

Vermeer calls the process of introducing an individual to a culture enculturation. When introduced to a culture, a person is accepted as part of a community. Vermeer discusses primary and secondary socialization as a distinction between an individual being born into a certain sociological and cultural surrounding as opposed to being introduced to it at a later stage of his / her life. Vermeer discards the translation of the traditional distinction between primary and secondary socialization into primary and secondary enculturation and will rather discuss the collective term enculturation stating that it is a lifelong process. Cultural behaviourism being taught by the community and by our parents and us picking up behaviourism models by observing and living in the culture. (1986, 186–196.)

Ammann discusses culture and communication, the definition of culture, translation as intercultural communication and the role of the translator in this intercultural communication. She mentions para, dia, and idio culture, referring to the society standards, codes of a certain group and the individual norms. Amman explains how important it is for the translator to understand the purpose of the document at hand and what an important role the translator plays in being part of transmitting a cultural message on top of and / or as part of the translation process. (1990, 37–54.)

When we think about the translation part of the web localization, we still need to understand and accommodate certain cultural rules. The communicative action according to Holz-Mänttari is reached through transmission of a message suitable to the intended function included in a suitable message or message carrier. In case of cultural barriers, the translator will cooperate with a respective expert. Both the source and the target recipient are part of

⁶ See Ammann (1990, 31, 42, 50); Stolze (1997, 27-28, 168-171, 167); Vermeer (1986, 43, 66, 178-183, 232).

their specific culture. One always has to understand the intended function of the target text – it is the very core of the translation or the description of the product. (1984, 112–114.)

Cronin paints visions of localization stripping off cultural nuances and bringing people closer to the same starting point. On the one hand through the internationalization aspirations of companies wanting to have as cultural agnostic a platform as possible and on the other hand through the close connection between localization and technology, where technology is predominantly English. (2006, 17–19.)

While we strive for a culturally agnostic source as the basis for localization, culture plays a very central role in customizing this culturally agnostic frame to fit the culturally accepted norms. Culture can also play a role on the business side in the planning phase. We understand that both web localization and translation (if we want to separate them) will abide by certain cultural rules. During a planning phase the participants might represent various countries and cultures, which, as I have noticed, can bring interesting aspects to the globalization strategy and localization process planning.

2.6. Global or local presence

There are about 1.2 billion web users worldwide out of which 200 million live in the United States. This would imply that at least one-sixth of all web sites are in English. For English speaking companies with customers outside of their own country, like the U.S, U.K. and Australia it is still pretty typical to offer English-only content. It is more common that companies with their head offices in non-English speaking countries would take the extra step and take the global markets into account. (DePalma et al. 2007, 4, 20.)

“Why globalize?” and “Why localize?” are questions to which anyone planning local presence will have to provide answers. The growing importance of local appearance and localization of a company’s website becomes evident. The ideal web site is seemingly locally created (DePalma et al. 2007, 3):

To paraphrase an old political truism, “all commerce is local”. Ideally, a website looks, feels, and smells like it was built in that market for only that market. Typically, indigenously produced sites will be better tuned to the linguistic, cultural, and transactional needs of that country than websites managed from abroad. That hometown advantage puts a burden on the ‘foreigners’: To succeed, they have to be at

least as good as the native alternative or provide enough value to make nationality irrelevant. That could be very expensive, especially if the foreigners don't scope the opportunity in a given market against the requirement to offer a quality experience that passes the local smell test. This is the reality of the global web.

Within the business-to-business market it is tempting to stick with an English-only web site with the assumption that the business world would always understand English. Even the non-English companies would often use English as their main language: English-speaking countries are a lucrative market for the non-English companies. (DePalma et al. 2007, 6–7.)

Web is easily perceived as multicultural by nature. One easily presumes that everybody on the web understands English – especially so when offering solutions or products to another business rather than an individual consumer. Understanding is different from preferring and feeling comfortable with. We feel more comfortable in the niche we are most familiar with – also with respect to language.

A person will easily lean towards trusting a source that feels familiar as opposed to a source that does not seem to have a connotation to other parts of his or her life. When putting this information into the localization frame, one can expect customers to rather trust a site presented to them in their own language than a language more foreign to them. Crick describes psychological theories about human consciousness which consider the human brain as a black box of which we only get to see and understand the outputs certain inputs would produce. Unfortunately we can not take a look inside this black box to understand the reasoning for the particular outcome. We can only assume and learn from experience. Even if we could take look, a lot would remain to be unexplained; we might find out that there are several simultaneous ongoing processes or that our behavior can partly be rather intuitive. (1997, 34–37.)

It should be safe to say that the longer the message is, the more important and attractive it is for the customer to be able to read it in their native language. The more information one gets about the product with as little effort as possible, the more pleased the customer is likely to be. Purchases are often dictated by emotions. Almgren (1998) mentioned that emotional aspects influence purchasing a product by up to 85%. Only 15% is to do with the fact-based reasoning for making a purchase⁷

⁷ See also DePalma, et al. (2006a, 15-17) about consumers preferences to read and purchase in their own language.

DePalma, Sargent, and Beninatto took this a step further; they investigated the web habits of residents in eight major European countries. They found out that even though people with limited English skills stop by English sites, they do so less frequently and are less inclined to purchase from those sites. It was evident that on average they spent more time on sites in their mother tongue. Over 70 % of the visitors preferred sites in their mother tongue. Although it was not crucial to have product documentation in the local language it was indeed the case for customer support. Even poorly translated content was better than no translation at all. As a conclusion of the study, one could say that customers would turn their back on a non-localized site and go to the competitor. (DePalma et al. 2006a, 1–4, 17 and Sargent & DePalma 2007a, 4.)

Outside of the basic cultural adaptation the site has to support local commercial and legislative elements, such as currency, tax, and regulatory matters. Other matters to be taken into account when planning localization are speed, connection and bandwidth. Language and cultural context is important but in the world of the Internet also performance, usability, and possible shipping costs are an issue for careful planning. (DePalma et al. 2006a, 24–26.)

Ease-of-reading is a form of ease-of-use. Fellenstein & Wood discuss customer behavior and preferences in reference to a well-designed site where the information is not too many clicks away. Companies are sometimes falsely lulled into the illusion of customers being brand loyal above anything else. In the Internet this is not the case; customers are loyal to ease-of-use. (2000, 69–70.)

Using English as a source language is often practical. It would target a large population right away and be useful in the localization / translation process. The majority of the localizers and translators in a multilingual localization or a translation company have English as one of their languages.

Calculations show that translating into 10 of the major languages would cover 76% of the population on the web and translating into 50 languages would account for 96% of the world's population. Businesses gauging between whether or not to translate into smaller languages might use this information as their basis. (DePalma et al. 2007, 7–11.)

2.7. Risks

Constant dialog is necessary to avoid failure and ensure commitment from both upper management and any other party involved in the process. In the case of web localization, the stakeholders of the local sites are often local marketing or even sales representatives, where sales is typically seen as an internal customer. It is crucial to gain a mutual understanding and acceptance of the basic approach in order to ensure successful implementation of the plan and the execution of the processes and workflows. Several issues have to be considered as possible risks, such as:

The company cannot agree on what is considered as centralized and centrally implemented content for localization. In my experience this might result in:

- Lack of commitment from marketing personnel, who are typically the direct contact to the customer and are the representatives and experts of their target market
- Not enough effort being put into reviewing the source information for its local market suitability
- False message to the internal customer (for example sales)
- Lack of customer interest
- Declining prices and sales

The plan does not get any support from management, which in my opinion might result in:

- Marketing and sales departments rejecting the localization plan
- Lack of commitment from marketing personnel even though the plan is seemingly accepted
- Not enough effort being put into reviewing the source information for its local market suitability
- False message to the target audience
- Lack of customer interest

Lack of communication between the web site developers and / or those planning and executing the content. I believe this might result in:

- The global source site creator failing to organize simultaneous shipping of local information
- Lack of credibility among the internal colleagues and external customers: lack of "feeling appreciated"
- False message to the target audience (internal and external)
Internal and external customers mistrusting the local site
- Lack of interest from the internal and external customer

Lack of communication between localization / globalization and marketing departments, which in my opinion might result in:

- Marketing department losing interest in co-operation if the localization department fails to keep them up-to-date
- Lack of commitment from the marketing personnel
- Internal and external customers mistrusting the local site
- Lack of overall credibility

The marketing department (or equivalent responsible for the local appearance) has not enough time to keep the decentralized, local content up-to-date. I believe that this might result in:

- Lack of credibility among external customers
- False message to the target audience (internal and external customers)
- Lack of customer interest

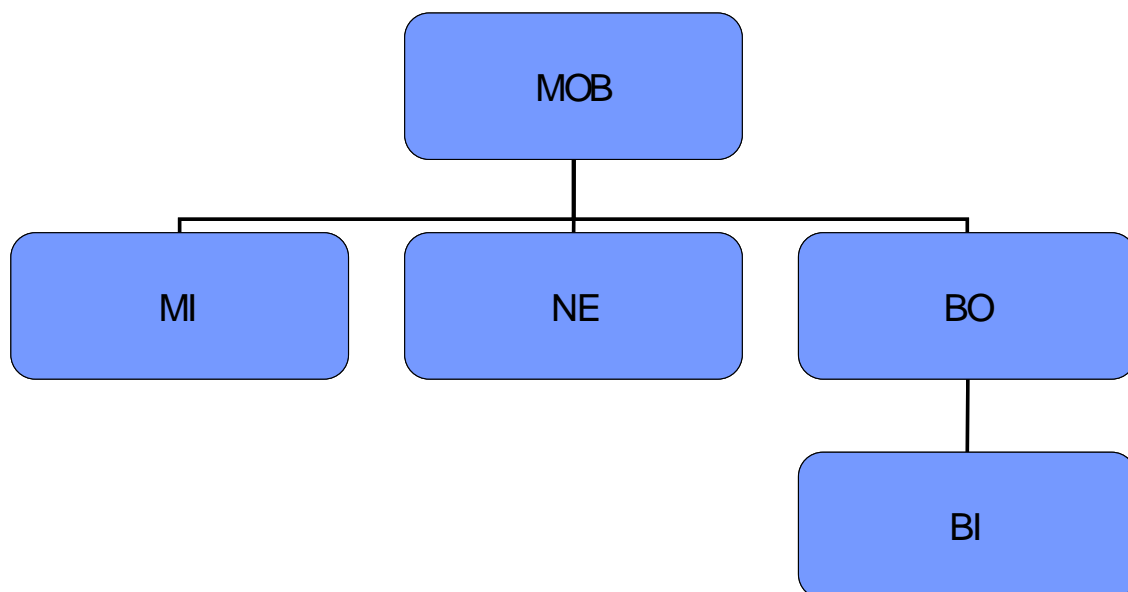
3. The case study

In this chapter I will introduce the company and the scope of the original localization and globalization plan. The case study depicts the decisions and the processes within the localization planning. As I mentioned earlier, the plan itself was influenced by a questionnaire sent to the responsible local marketing managers, by recurring face-to-face meetings and by

recurring group meetings (discussed in more detail in the material and method section), best practices I learned from discussions with other companies at IQPC and LISA conferences during 2000, discussions with other entities within the corporation dealing with localization and content management as well as my previous experience within localization.

I will depict the decision-making process from initial thoughts of having something local to the actual globalization and localization planning. BI (Better Internet), a business unit (later also referred to as company) in a multinational corporation, was producing security solutions for the IT environment all over the world. BI was a business entity of BO (Better Objects), one of three companies within MOB Corporation (Multi Operational Business). Other companies of the MOB Corporation are MI (Multi Internet) and NE (Net Experience). MOB, MI and NE were headed out of Finland, whereas BO and therefore BI were headquartered in the US. Due to reorganizations, BI and BO ceased to exist in 2004. I headed the planning process during the second half of 2000 and the actual implementation took place in 2001.

The local BI offices were responsible for the local content creation and for the budget of the local sites. Marketing managers were heading the local BI web sites. Prior to the new process, the most common way for marketing managers to find information seemed to be by surfing the web and searching for updates on the MOB.com site.



Picture 4: MOB Structure

3.1. Scope of case study

I will explain the reasoning and development of the globalization strategy and localization process I created for a multicultural company with customers in the Americas, Asia Pacific, Europe, Middle East, and Africa. The product range of the example company covers different types of Internet security solutions. The company had identified an urgent need to cover the local business to business marketing requirements. I will describe and discuss BI's plans and decision-making process during the creation and publishing of its web sites in various locations worldwide.

BI stakeholders, i.e. local marketing managers together with the eBusiness director and eMarketing manager had discussed the need for local marketing on the World Wide Web. It was unclear whether the local sites were to be created individually, or whether there was synergy to be exploited. It was equally undecided whether the language of the sites should be English or whether the local language should be applied. The common perception of the management in the headquarter was that English should suffice since the business was targeted to other businesses as opposed to individual customers and the B2B language was generally considered to be English.

In the world of the web, eBusiness was taking its first steps. With this background it had become evident that a stronger appearance on the web was called for. Although BI was one of the units within BO, it was the only one having a web presence, therefore the unit BI presented the company BO on the web as well as in globalization and localization matters.

eBusiness was at the peak of its hype, thus the team in the example case was called the BI eBusiness team, and eBusiness⁸ was what the team was headed to do, albeit what eBusiness meant in this case was somewhat unclear to the organization.

The company had recently purchased several smaller security solution companies and found itself in the midst of both integration issues as well as growth issues. BI had been founded just six months earlier and was more or less in a start-up phase.

Due to the rapid growth of the company the roles and tasks within and between the different teams had not yet been established. Overlapping responsibilities were not uncommon, neither was the lack of knowledge about the function of the teams within and outside of the organization. My initial task for the planning work was to determine a path on how and what

⁸ Literature regarding eMarketing and eBusiness was blooming and theories for best solutions were published frequently. Publications, such as Understanding Electronic Commerce, Exploring E-commerce, Customer Service on the Internet, The Clickable Corporation, Creating Killer Web Sites, and The e-Marketplace were read eagerly to understand the basics about a company going global on the web.

to localize. When investigating source material, i.e. the existing local web sites, the target audience, and the publishing tool, it became more evident, that this wasn't just about localization. It was about globalization, internationalization, content management, localization, and translation and about justifying the establishment of local sites in the local language.

The original goal of the localization plan was to establish an up-to-date process for a given product range of security solutions and a given market demography within Europe in three months. This goal assumed that localization was a process that could be kicked off as such, without much pre-planning. For the headquarter it meant adjusting the product marketing to fit the local product range and for local marketing it meant re-creating local appearance from scratch to accommodate local business culture and conventions. For some of the marketing managers it included translation, for others it did not.

3.2. Preparation for the initial process work

Business and marketing people at BI had identified a need to publish local marketing material. Local appearance for the company meant different things from slightly modifying an English site to representing the local product portfolio through translation of identified areas to local re-creation of original source material. This information became evident to me during discussions with BI management and with the local marketing managers.

Prior to me starting in my role as a localization manager, a consulting company (Satama) had pulled together information about elements and areas that were seen as important / unimportant to localize. I will depict those elements in 3.5.1. The result of the study suggested that there were commonalities between what local marketing managers saw as important to be localized. When I discussed the results with the marketing managers, they did not seem to feel that there are commonalities between the languages, nor did they look at the commonalities as something that could be seen as global or centralized, localization was seen as a per country effort. They would still succumb to discussions concerning centralization possibilities and what those possibilities would mean in their areas. As a result it was decided that the requirements of the different locations would be similar enough to start studying the possibility of building a global single source site, which would be localized for the target markets.

The immediate target audience of the company, hence of the planned web site(s), was retailers in various parts of the world. The other target audience was the internal sales and marketing (i.e. the marketing and sales teams).

When surfing the web and looking at local BI sites, it became clear that the existing web appearance was a mix of partly localized web sites with a mix of different layouts. In order not to confuse the customers, I felt that a more unanimous approach to the company wide web site creation was called for. Localization as a term and local existence had been understood in different ways within the various country level organizations. The first concrete step for me was to discuss with the stakeholders mentioned and identify the best general approach together with the eBusiness management. We discussed the following three options:

- Publishing one common English site throughout all locales
- Creating local country sites from scratch
- Choosing a source site to be used as basis for all countries

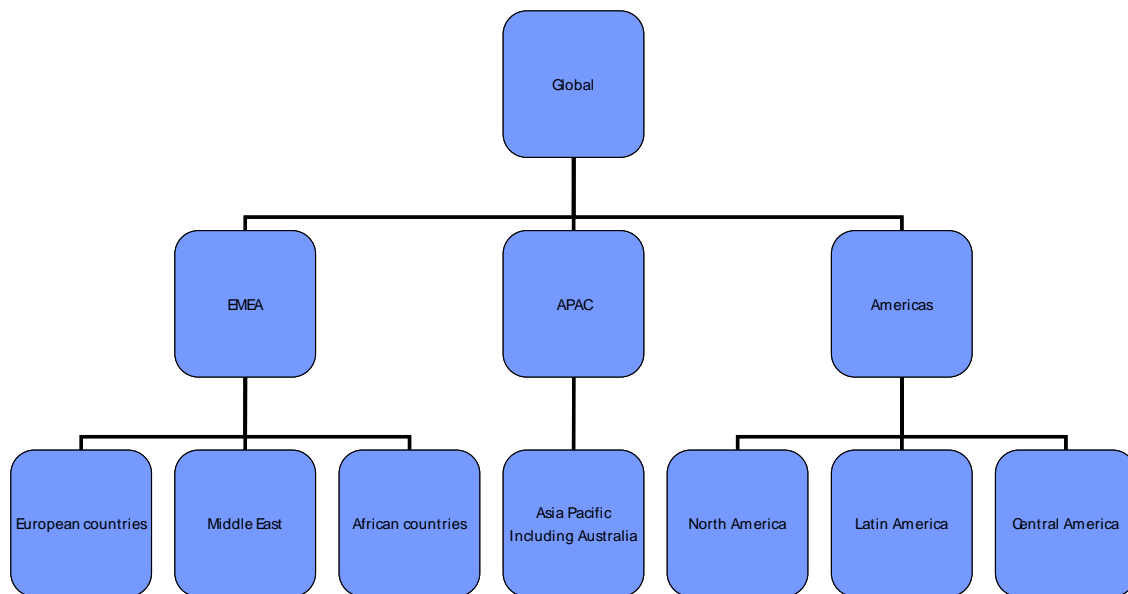
I used the experience I had gathered over the years in the localization industry and in discussions within globalization and localization forums organized by IQPC and LISA, and suggested that the best approach would be to recreate a source site which was as easy as possible to localize (IQPC 2000; LISA 2000). I was especially convinced by the Microsoft model, which suggested a mixed model of centralizing vs. decentralizing both servers and responsibilities (Freitas et al 2000; Frisk 2000e).

3.3. Research and background for process planning

BI management faced their first task in having to decide the priority order for the countries. It was evident that not all countries could be dealt with simultaneously – not in the given time frame and not in the market and product situation. BI's market segmentation was still work-in-progress.

The chosen countries acted as the Tier 1 pilot for the globalization and localization strategy and process. They were chosen by BI management and the decision was based on business reasons. The Tier 1 countries for localization represented two different regions EMEA

(Europe, Middle East and Africa) and APAC (Asia Pacific) and comprised the following: Germany, France, Sweden, Denmark, Norway, United Kingdom, Finland and later on Japan. I suggested that the source material be created in English due to English being the typical B2B language and the easiest to find translators for. The source material was created in the US as the company was based there.



Picture 5: BI Areas

Up until the beginning of the localization planning, local content for BI.com had mainly been created on MOB.com global templates and stored on local servers. The marketing managers had copied the local content from the BI.com site and mailed it to a media agency. This agency then either hired a localization or translation company or translated the content in-house. After the translation was complete, the new media agency employees edited the content and then cut and pasted it between the codes of the target site. There was no consolidated content management process or storage for either the source or the target text, nor was there a translation memory management process in use. Translation vendors were not centrally chosen; instead every country used its own contacts. The complete localization process was largely in the hands of middlemen.

To me it seemed that updating the local sites was time consuming, difficult, expensive and did not follow any clear process. Localization and translation assignments were identified and executed randomly. One of the regions had outsourced the complete local web appearance to a media agency. The interest of the marketing managers in localizing their respective country site varied – both regarding self-involvement and even in having any web presence in the first place. The target market was not really thought of in great detail. People were expected to understand English and not to require information in their own language. Some marketing managers had started localizing BI sites with diverse enthusiasm, capability, and budget. A few of the marketing managers also had wider responsibilities and bigger areas to cover outside of BI, which resulted in a lack of time. Therefore the grade of localization and interest in it differed immensely, as did the communication between the marketing and the localization team. Some marketing managers were very active and interested in developing the site – some less. This in fact created a, what could be called a sub-tier within Tier 1 and resulted in the end in the Finnish and Japanese sites being localized and published first.

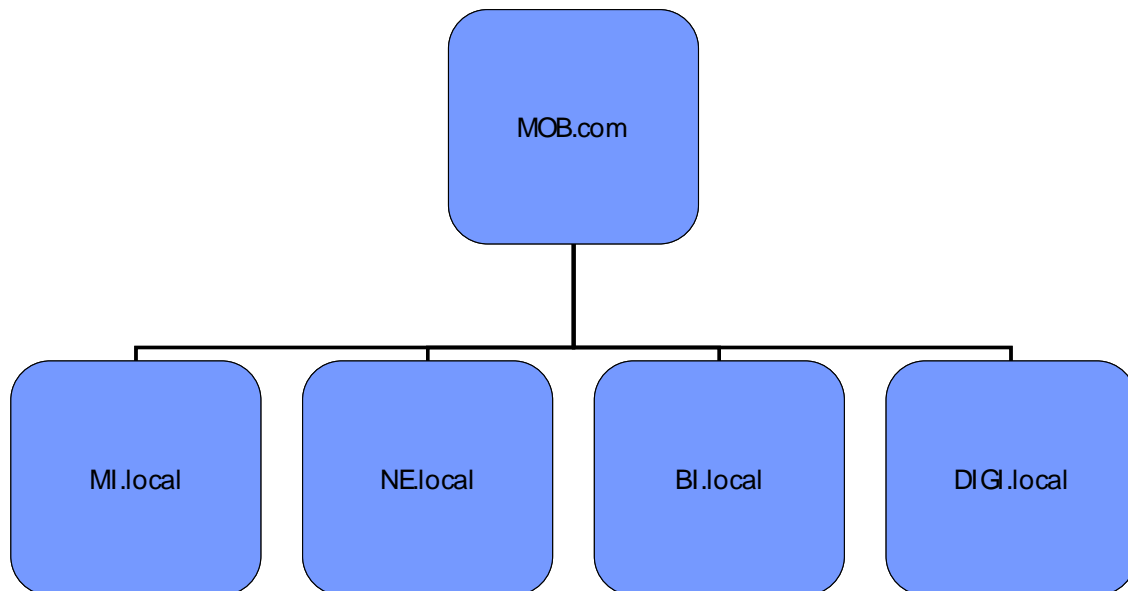
Since BI was a newly created company it had not yet established its footprint in the corporate web. Representatives of other MOB companies owned the main local sites and domain names. When discussing with MOB stakeholders and comparing existing localization models, I realized that BI was facing the dilemma of either being hidden under existing domain names or having to start the creation from scratch, even re-creating the domain names. I decided to actively seek a solution among the corporate organization and start influencing their decision-making.

When the localization / globalization planning started, BI content on the local MOB web sites was rather limited. MOB.co.uk content was a direct copy of the US-based and US English BI.com site whereas the other country sites mainly provided one or two pages worth of basic information about BI product lines. The company introduction and overall content mostly consisted of bits and pieces translated from the corporate MOB.com content. Customers wanting to get more information were directed to MOB.com, which seemed rather confusing for the users. They would find more information about the corporation itself but not about the company products they were looking for. If they chose, for example, an Internet security product icon and wanted to read the detailed product information in their own language, the customer was in some cases redirected to the front page of the corporate web site and in some cases to the US product info site. Sometimes the links would produce error messages or be directed to outdated sites, which did not have anything to do with the product in question.

In addition to the varying depth of the content, each of the local country sites had a different look and feel as well as navigation logic. The content on the local pages was in many cases outdated. The ownership of the local web sites was dispersed to country marketing managers with many other obligations leaving very little time for keeping the web sites up-to-date. The mixed model and the uncoordinated way of handling local web sites became clear to me during my discussions with local marketing managers. The very first discussions were face-to-face discussions and I had invited them all one by one. Further discussions occurred first in weekly and later in monthly marketing meetings with all marketing managers in the same room. My first conclusion was that having all these different sites both in terms of content and navigation together with the necessity of finding time-saving solutions made a centralized globalization strategy planning necessary.

3.3.1. MOB web sites

MOB (Multi Operational Business) corporation web site structure consisted of content related to the following companies and their products: MI (Multi Innovations), NE (Net Enterprises), and BI (Better Internet) as well as DIGI, a business unit reporting partially to the corporate and partially to MI.



Picture 6: Web Structure

3.3.1.1. MOB – The corporate

Since MOB was a global corporate, it was only natural to attempt to benefit from best practices within other departments and units. I studied procedures within MOB companies and organizations – during August and September of 2000 – prior to making final decisions for BI procedures. I contacted the site owners and agreed on face-to-face meetings with them. The owners walked the processes through with me in a rather informal discussion mode. I used this info as background for the decisions depicted in the globalization and localization plan.

The responsibilities and ownership of different parts of the corporate web proved to be complicated and non-transparent. I will discuss these ownerships while I introduce the different localization and web renewal projects (such as Web Book 2.0). Several simultaneous improvement efforts were ongoing on different levels and in the different companies and organizations of the corporate.

The home page of MOB was owned by a corporate representative, who was largely responsible for the look and feel as well as navigation of all MOB.com corporate and company sites.

Global MOB was at the time planning web guidelines called Web Book 2.0 (WB2), which would include procedures for MOB wide globalization, localization, and content management. The four key elements of the new Web Book were corporate level features (look and feel), corporate level functions (common components), and local elements, such as double byte and business model related elements within B2B, B2C, and B2E: business to business, business to consumer and business to end user. This meant that WB2 took a stand on the basics of the most common localization elements, such as graphics, fonts, code separation, code protection, country dependent formats, double byte support, browser, bandwidth, space, and words as graphical elements. The WB2 work also incorporated globalization and internationalization issues, such as distribution, logistics, legal issues, taxation, pricing, and currency as well as plans of a corporate-wide content management tool integration. Additionally global MOB was planning to build a global content management tool to be used by all MOB companies where applicable.

WB2 stakeholders, i.e. MOB level E-Marketing management, asked me to be responsible for and the owner of the globalization and localization sections.

3.3.1.2. Localization at MI

While the MOB.com home site was owned by corporate, it became clear to me that the rest of the main pages within MOB.com were owned by a MI representative, who was responsible for the look and feel, the visibility and the navigation of the web sites aside from the home page. MI was planning to renew its web appearance. MI web owner and I agreed to establish a common steering group to ensure that the requirements of the different companies would be heard and taken evenly into consideration. MI had arranged on one of their local sites to be the pilot for web renewal: MI.fi.

3.3.1.3. MI.fi procedure and caveats

When discussing with MI representative, I gathered that she wished to start a web face lift by completely renewing the look and feel of the MI.fi site. They had engaged a media company to implement the new look, and as part of the renewal planned to review the localization process due the inefficiency of the existing one. MI.fi considered using the same platform and software for MOB.fi as MOB.com was using and had expressed their interest in following Web Book 2.0 guidelines.

While discussing with the MI representative, it became evident that she had involved several agencies for different tasks:

- A technical agency, enforcing the platform / software
- A media agency, creating the look and feel of the MI site
- Other MI offices
- Several translation agencies for the pure translation
- An advertising agency

The translatable content was a package of HTML files sent from the media agency to local offices through a Finnish content coordinator. The local offices handled the translation and look and feel of the sites as well as writing parts of the content themselves. The technical decisions regarding the local sites were handled locally.

Since MI used several different agencies and vendors, their costs were multiple due to increased need for communication. In addition to this the danger of mistakes and double work was increased. The traffic between the agencies and parties involved was very time-consuming not only due to the many different vendors but also due to the fact that no translation memory or global content management system was in use. Terminology within MI (applications, marketing collaterals, and web site) was fairly inconsistent because of the lack of translation / content repositories and the lack of common procedures. There were even inconsistencies within local web sites between different areas, such as MI main page and MI.fi.

I then identified following issues as risks:

- Lack of common content repository and glossaries
 - Dependency on the translation vendor
 - Inconsistency of text within the different country levels of MI and between different units
 - Quality problems
 - Unnecessary costs

- Several vendors for different tasks during different launches
 - Lot of traffic between different vendors and MI during the localization phase: various localization phases involved different vendors

- No existing written guidelines for (localization) vendors
 - Localization was handled by sending packaged HTML files. No other guidelines existed

- Total variance in look and feel from the source site
 - Problems in the updating phase. In cases where the target site varied widely from the source site, updates required a lot of extra work and resources

3.3.1.4. DIGI – Procedure, localization loop and caveats

DIGI provided CRM (customer relationship management) service on its web sites, offering digitally downloadable assets and support for MOB product users and loyal customers. Although the site was open for all DIGI product consumers, it was necessary to register as a user. I contacted the localization coordinator to discuss their localization processes. DIGI used a global template common for all local sites. Although the text on the site was pure HTML and therefore fairly static, there were plans to integrate Java for more dynamic content to appeal to more customers.

DIGI used one MLV (multilingual vendor) for all languages. The localizers were native speaking translators living in the target country. The platform creation and maintenance was taken care of by a technical agency whereas a media agency placed the translated text between the codes. All the sites had the same template, layout, and content. MOB had one contact person: a localization coordinator dealing with all languages.

DIGI site was published in 16 different languages in 23 different countries. The process used enabled DIGI to launch all new features and updates almost simultaneously. DIGI had encountered problems with countries with special characters, especially Greece. DIGI planned to switch the 20% to 80% ratio between global to local the other way around. DIGI expressed no interest in cooperation with the rest of the MOB web site teams.

Since DIGI was the only company with – what could be called – a localization process, I felt that it made sense to take a closer look. DIGI coordinated translatable text with the translation company, which returned the translated text to DIGI's product coordinators for validation. Changes were marked and the text was sent back to the translation company for correction. The translation company then delivered the text via e-mail to DIGI, who, in turn, delivered it to the media agency, which implemented the translation to the sites. Implementation was carried out manually by copying and pasting the text between the codes.

DIGI's translation vendor had just started to use a translation tool and they had also started creating glossaries. The MI software localization unit had expressed some concern about the inconsistency of terminology between the MI product applications and the product support on the DIGI web site.

The access to the web sites was restricted based on the customers' location and it was not possible to visit other country sites. This decreased the menace of having to deal with legal issues, pricing, and deliverables across country borders.

Due to the element of selling digital assets, DIGI still had had to deal with country-dependent legal matters. Fortunately they had their own legal councilor to deal with global, regional, and local legal issues. All text was validated by the legal councilor prior to publishing.

DIGI had understood the basics of managing translation but a seamless localization process was still missing. I still identified following issues as risks:

- Lacking translation repository and lacking existing glossary
 - Dependency on the translation vendor
 - Inconsistency of content and product info between DIGI, MI and MOB
 - Quality problems
 - Unnecessary costs

- Multiplied usage of new media agencies
 - There wouldn't have been any need to use a separate media agency for all languages i.e. having them execute the same task repeatedly. A localization vendor could have handled different languages without additional new media costs. The content could have been localized in between the codes without having to use the time-consuming copy and paste procedure.

- Lack of interest within the local marketing department
 - No local empowering since all localization was centralized. DIGI localization coordinator was worried about the lack of local interest. BI globalization and localization manager identified full centralization as inevitably resulting in a lack of interest. There was also a great risk of lacking interest by the end customer due to not having taken all local specifics taken into account.

3.3.1.5. Localization at NE

When contacting NE web representatives, I found out that there were no common procedures or processes nor plans for localization or globalization at NE. They had, however started to realize the importance and need for a global content management system for different technical solutions out on the market.

The product range and the requirements of NE were very different from the rest of the companies at MOB. This is why I did not take NE solutions into closer examination in the first phase planning. NE's products needed a more robust solution, the expected cycle was slower and the amount of localizable text was bigger, most of the content being customer product support files, such as help texts, and typically had the nature of technical writing. BI requirements were more the nature of marketing and product information and were very much involved with the speed of the globalization cycle. The biggest issue was overall timing. NE had planned to come up with new solutions within the next year. BI could not wait for the results, since they planned to start implementing the solution within three months.

3.4. Globalization strategy of BI

When I started my work as a localization manager, BI had no common perception as a company of what they expected of localization. In spite of the, what could be called, challenging starting situation, the very core requirement was soon identified as establishing local sites that were always up-to-date and did not require excessive amount of time, money, and effort. The accuracy of the overall product information was important, yet for the supplement information salability and market suitability were seen as the main requirements. The amount of work involved in localizing web sites struck BI marketing by surprise. The route was thought to be easy, especially as specific elements were already pre-defined: MOB branding was global and all MOB companies and organizations had to follow certain already existing web rules, which determined for example color and navigation.

Due to the diverse localization processes within the various parts of the corporation, it was evident to me that not much of the existing procedures could be leveraged or used for streamlining. DIGI's procedures seemed closest to a thorough localization process – but not close enough and due to the different product portfolio and the lack of interest in building or participating in common procedures, DIGI would continue on their own path in building an

isolated system, whereas at BI the fast track plans were decided to be based on the corporate long-term planning to be in synchronization with WB2.

It was useful for me to be able to be part of the corporate-wide planning; hence I ended up acting as a link between the various businesses throughout the corporate organization, between the global and local BI business teams and the corporate R&D (research and development) process teams. In possible BI internal conflict situations the support from corporate would be handy.

The traditional information channel, also for business-to-business customers had up until that point been print. In discussions with local BI marketing and sales representatives, Internet and extranet won greater value. Internet and extranet were both important for BI; for this particular localization planning, extranet was excluded and BI concentrated on localizing its Internet appearance. Prior to my planning work, Satama, the consulting company had discussed the needs with local marketing managers to understand the initial reasoning for localization and they had presented the following, still valid, reasoning for local web appearance:

- The Internet is seen as a very important channel in the communication of B2B clients
- The Internet is an important channel of communication as Internet penetration and usage grows rapidly – BI should also “live as they teach”
- Particularly in the Nordic countries initial contact to the company is more often made via the Internet
- Localization is mostly seen as very important, although opinions on what and how much to localize differ
- The Internet should be seen both as a way of communicating with partners (resellers and distributors) as well as with clients, but also as a way of sharing information especially between partners
- In the future, the Internet should also function as an E-Commerce tool for orders and payments

I used the reasoning as a guideline in my globalization and localization planning. The issue of what localization meant and what the steps should be proved to be a bigger question than what and how much. The ultimate question turned out to be: what does localization mean, what are the effects and how should it be implemented. From an eCommerce perspective David Kosiur (1997, 134-136) lists similar notions of the importance of moving from print to

the Internet as were discussed with BI marketing managers and put together as notions about using the Internet for marketing purposes.

When marketing experts at BI initially discussed the need for publishing web sites for its different locales, they had not laid out a detailed plan on what the exact result would and should be. The scope was “to have something to attract our customers”. How exactly this would come about and whether any technical or translation support existed had not been discussed. In discussions it became evident that localization was largely seen as choosing the products suitable for the target market and adding local call center information. Bigger questions around localization had not been discussed, such as whether it affects the source site or even if there is a need to agree on a certain source site. In my experience in the localization world, I felt that it was imperative to come to a solution where the company had a common source to benefit from. I also attended localization and globalization conferences to gain further support for this thinking.

Instead of immediately planning for the actual content of the local sites I started the actual process work with defining and communicating the concept of localization: depicting in an understandable manner what localization was, could be, and maybe should be. Similar terminology and concept discussions as in the beginning of this thesis took place.

Understanding the rather colorful usage of the term localization within the company helped in determining the first steps in the definition of the needed processes and roles. Understanding the different perceptions of localization and the elements involved was a learning curve for all parties involved – including me.

After achieving a consensus and common understanding about the terminology during the recurring meetings, the next step was to clearly define the target market and the customer segmentation.

Understanding and identification of the target market is crucial. In accordance with the target market definition one should be clear about the correctness and validity of the message offered to the customer (Fellenstein & Wood 2000, 77–78).

Sterne already described in the mid 90s the definition and realization of ease-of-use and enabling information that is easy to find as a common problem for all web site designers (1996, 29).

This problem is still shared not only by the web site designers but by the whole web industry. Right after having identified the customer, the target market, and the schedule one faces the question of how to present the information on the web attractive enough for the end-user to

discard the competition and become a loyal customer. Localization is a form of personalization while personalization, reaching out, is something that a customer feels and easily turns to. Sterne mentions interaction between the customer and the company as a strong element in reaching out. Interaction both ways, not only sending information to the customer but also giving them the chance to reach out, ask questions and be able to give customer feedback with little effort. (1996, 53–54.)

After achieving a common understanding of the benefits local Internet appearance would bring, most marketing interviewees saw localization as a value adding communication tool. It was evident that the unwanted anonymity of BI had been seen as an obstacle to be defeated by the local Internet presence. This worry was identified during Satama's summary creation. Another result was that general BI information (entry text, internal customer, and marketing material) was seen as elements comprising areas that should be translated into the local language.

The web era and the common notion of a web year being three months, dictated that BI would strive towards easy localization and a quick turnaround time, and at the same time local sites needed to have a look and feel that could be identified as local.

The site should simultaneously provide information for all customers in all locales, eventually providing first class service in all countries and offer customers (for example VARs, i.e. value adding resellers) a full service in whatever language and in whatever culture they wished to do business in. Marketing and sales representatives would gather and forward local customer requirements as well as local company opinions and visions. After having understood the global enablers and identifying the global elements, it was time for me to bring the thought into action through preparing the actual localization plan, which would be based on global enablers.

3.5. Fast track localization

The countries that originally decided for fast track localization were Germany, France, Sweden, Denmark, Norway, United Kingdom, and Finland. Japan was accepted by the BI management to be added later on during the course of the strategy planning. I had identified that Japanese product portfolio as well as the corporate web template were surprisingly similar to the European one.

Since MOB.com was seen as the main MOB page and since, according to my experience in the localization world, English was the most common source language used within localization, I suggested using BI.com as their source site for information. The suggestion was approved in the BI management meeting. Small adjustments had to be made and some rework on the images, such as removing all the text items, had to be executed to support basic localization elements. Although the source text came from the US, I suggested that the source template should be designed on the MOB / BI.co.uk site. This was due to the fact that the MOB.com template differed radically from the European templates. For local marketing managers the accuracy of the overall product information was important. For the supplement information salability and market suitability were the main requirements. As the basic corporate information was obtained from the BI.com site, I suggested rewriting the .com content using rather universal English language that would be free from cultural restraints and characteristics. This secured the capability to use the particular content directly within BI.co.uk. For other local sites the content was localized using the BI.co.uk. template. I felt that placing BI sites under MOB.com would ease the way for BI to use the same technical solutions as MOB.com was using.

For smooth localization process, I designed a model where the pages followed templates that were commonly identified and agreed on. Localizing the BI pages centrally, based on one common template, provided a scalable streamlined strategy for eBusiness. In the plan I suggested that for efficient localization, BI should take advantage of the existing source and add any local requirements where and when needed. The frame would be built to support as many locales as possible with as little effort as possible. The source template would be as culturally agnostic as possible, the known internationalization and localization elements would be taken into account, and a common database would serve the local countries. The templates were designed in a way that they would not exclude locally-produced content.

BI faced an extra challenge in that its products were not available in all of the corporate product countries – this may have partly been the cause for BI marketing struggling to understand the market base and create a clear marketing message.

It had become evident that the original plan of executing fully local sites in just three months would not be feasible, hence I divided the process creation at BI in two: the fast track solution, which would cover the Tier 1 languages and the solid track solution that would cover more profound back-end improvements, including the basic understanding of internationalization elements.

Within the very first steps of the fast track globalization and localization process, I suggested that the company would not make changes on the back-end infrastructure. Nevertheless to understand the entity – even magnitude – of globalization and the steps for a future and more solid model, it was inevitable to already plan ahead. The long term goal would affect the short term steps. In addition to the back-end improvements the solid track process would entail common templates, a global content management system, and integration into a translation tool.

I decided to create the long term BI localization strategy later on in synchronization with WB2, since this would prevent unnecessary double work and costs. Since BI was tightly involved in creating the WB2 due to my participation, it could take the necessary long-term issues into account already while planning the first version of centralized BI web sites. I had the perfect opportunity to give BI specific input in planning corporate-wide WB2. Nevertheless, since WB2 was a big, corporate level effort, the time-line was not coherent with BI's schedule and BI would have to move faster than the corporate within localization planning and implementation. It was clear that on the corporate level the importance of thinking global when acting local had been internalized.

The globalization and localization team (later web operations team) acted as the point of contact where all wishes and expectations were gathered. I aimed to come up with a solution, which would address as many requirements as possible, thus creating a process that was efficient and easy to manage and taking the lack of resources in the local offices, thus minimizing the local workload, into account. This solution was the very core of the globalization and localization plan.

3.5.1. Common elements

Marketing managers had expressed an interest in expanding the local presence but the expectations for the site had varied between creating a local web site from scratch and having a mix of English and local content to a fully localized site using a global site as the source. In spite of the initial questionnaire and the consolidated results, there was no common vision on the outcome of the elements to be presented on the site – or on who should be producing the information, yet providing all basic company information and customer service in the local language was seen as a competitive advantage. This became evident in the recurring meetings with the local marketing and online managers. It may be that marketing managers had not really thought of the consequences and the realization part of the answers while answering them.

My work to identify localization needs started with investigating the specific local requirements within the locales of BI. Until that point BI marketing had mainly gathered the deviations not thinking of commonalities as a basis of local web presence – benefiting locally from global elements. As mentioned earlier the countries were divided into Tiers following the priority and the relation of the products and product info. During meetings and discussions about requirements and best processes, I received polite answers to the interviews but at this point marketing managers had a tough time understanding the benefit of identifying commonalities. I assumed that this was to do with a slight resistance of anticipated loss of control through the planned changes.

To find out what the desired target state for localizable content in each of the countries was, marketing personnel of Tier 1 languages were interviewed as representatives of the B2B customer. The main focus from discussions performed and consolidated in a presentation by Satama had been on understanding the details for:

- How to profile BI on the local site
- How to create an introduction to local:
 - Sales and marketing material
 - Activities and events
 - Contact info for partners and resellers.

To understand and conclude what this actually meant on the global and on the local level, needed more time and effort. Discussions with marketing representatives proved to be time-consuming. It was not easy to translate the wishes and requirements into executable actions. Lack of common terminology in the Internet, online and localization world had significant influence on these misconceptions. The different backgrounds of the participants contributed to these misconceptions. My background was in the localization industry, a different type of industry than the marketing and even online managers within the security business. I looked at the dilemma from a process point of view, where streamlining and identifying common elements together with the implementation of culturally relevant and locally accepted content were considered important. Marketing managers had their focus on their immediate customers and looked at the local requirements as very specific to their locales – not as something that could be considered from a global point-of-view. After several repeated meetings, the following information was commonly considered as important to publish on the

web – throughout the different locales. The same needs had actually already been identified through the consultancy consolidation:

- Sales and marketing material in general, especially:
 - Local events, seminars and event calendars
 - Contact information for resellers
 - Contact information lists for partners
 - Local BI contact info
 - New product launches
 - BI general information
 - Visitor activity
 - Press release
 - Investor relations
 - Articles and newsletters

- The degree of importance of the following info varied among different countries from not important to very important when localizing the following and was thus excluded from the fast track localization planning and left to local discretion. Again, this information was, in the end, identified twice: once by the consulting company and the second time around by me during the recurring meetings with the marketing and online managers.
 - Local media co-operation
 - Online information 24x7
 - Call desk contact information
 - FAQ (frequently asked questions) per product
 - Downloadable product presentations
 - Best-in-test and other product awards
 - Basic product information (price lists and technical guidance)
 - Order and delivery
 - Customer satisfaction survey

Those areas within the BI site that were uniquely local, such as local product information, brochures, notices, seminars, events, and local distribution lists would be managed locally by marketing in order to effectively serve the local customer as an individual and also to ensure local empowerment.

3.5.1.1. Decentrally centralized content

Marketing managers at BI were solely responsible for all marketing in their country, not just the Internet. Due to their large responsibilities, they were eventually happy to accept help in planning and executing the web content and not to have to separately explore and coordinate all product and company information on the web. The information was largely centralized, allowing marketing to concentrate more on the overall marketing efforts.

Decentrally centralized implies a point of view leaning towards globalization. When using a mix of a decentrally centralized model, the source information repository is common to all countries. The information flow is managed centrally every time there is a change to the source site. A similar type of approach was used by Microsoft as mentioned earlier.

BI marketing and I had come to an understanding about the common, globally sourced, elements on the local websites. I suggested the information be centralized, i.e. the content and translation flow would be coordinated centrally, and it was up to the local marketing managers to use it to their discretion.

In this model, BI marketing could make case-by-case decisions on whether to implement the changes to the local sites or not, and suggestions on which localization-dependent changes should be executed on the source site to make it functional for the local sites.

It was important to assure marketing that their local requirements would be taken into account, even lead the process thinking, and that the power of final execution was in the hands of the local business.

We agreed to maintain a regular flow of communication between the BI.com content owner and developers. By then my role had grown from localization manager to globalization and localization manager and I had a team of three people. Any planned changes on the source site would always be discussed with my team (consisting of two web specialists and a content coordinator), which was responsible for the centralized globalization and localization efforts. This ensured that the experts could influence the creation of the source information and the source template.

We agreed that my team would always keep the marketing team up-to-date regarding any changes. The marketing department was encouraged, in turn, to keep the sales department updated. Prior to the process implementation, marketing managers had not received (early) enough information about changes or updates for the source sites.

3.5.1.2. Centrally decentralized content

Sharing responsibilities hence sharing pain is often a prerequisite for good cooperation and commitment. Local marketing still wished to have power over their own country sites, hence all information unique to a certain country was agreed to be the responsibility of the local marketing. Marketing expressed a strong wish to have the final say over local web sites.

The centrally decentralized model implies a point of view leaning towards localization. Keeping marketing constantly up-to-date about all changes on the source site would also serve them in a case where they wished to add new common elements to the localization flow.

I suggested to commonly agreeing – between local marketing and my team – on rules, which would ensure that the local supplements would not break the template or interfere with the central globalization frame.

The agreed templates were used for both localizable global (source) content as well as locally sourced and created content, like events and contact information. Even though all templates were centralized, the content of these locally sourced sections was solely defined and created by the local marketing department. While the global source content and the centrally localized content were managed by the web publishers within my team, I planned a parallel workflow for completely local content managed by local marketing managers.

3.5.2. In-house vs. outsourcing

Although the majority of companies choose to outsource localization, the grade of outsourcing depends largely on the technology used and on the current in-house capacity. Companies tend to be reluctant to hire new staff to cover the localization needs. Studies say that about 10 % of companies would develop their own translation management tools and a larger number are developing customized tools to eliminate problems that are specific to their own specialty area. The majority of organizations are relying on commercial tools and outsourcing the localization. (Lommel 2007, 34–35; DePalma et al. 2007, 1.)

Outsourcing localization from business perspective only means outsourcing part of the process. From my experience, it is usually referred to as outsourcing translation. The part involving target market and product planning will always reside on the business side as well as the general administration. Even though a company would outsource the localization activities, it will have to take the management costs that result from localization into account. Companies may find that the internal costs sum up to as much as half of what they are paying the LSPs (Localization Service Provider). (DePalma et al. 2007, 16.) Out of the specific skills involved in localization, translation would be outsourced by 85% (Lommel 2007, 32).⁹ In my plan I suggested that translation would be centralized and outsourced.

3.5.3. Process flow

After having the globalization and localization approach accepted by the marketing department and the management, I went back to local marketing to discuss details and gain commitment for the actual process steps. Local marketing preferred small changes and a trial period prior to full implementation of a content management solution with automated workflows. We agreed to keep a common approach and the commonly agreed elements, which would support simultaneous launch and publication in the local countries.

In the end and according to the globalization and localization plan the following elements were fully centralized for localization purposes:

- BI general information
- Basic product information (price lists and technical guidance)
- Future product creation information
- Press release
- Investor relations
- Articles and newsletters
- New product launches (marketing chooses whether to actually publish the information)

⁹ See also Esselink (2000, 13) about outsourcing.

The template was centralized, while the content was managed locally (decentralized) for the following elements:

- Local events seminars as well as event calendars
- Resellers & partners contact information and partner link lists
- BI local contact info
- Additional local information
- Visitor activity

3.5.4. Localization and translation

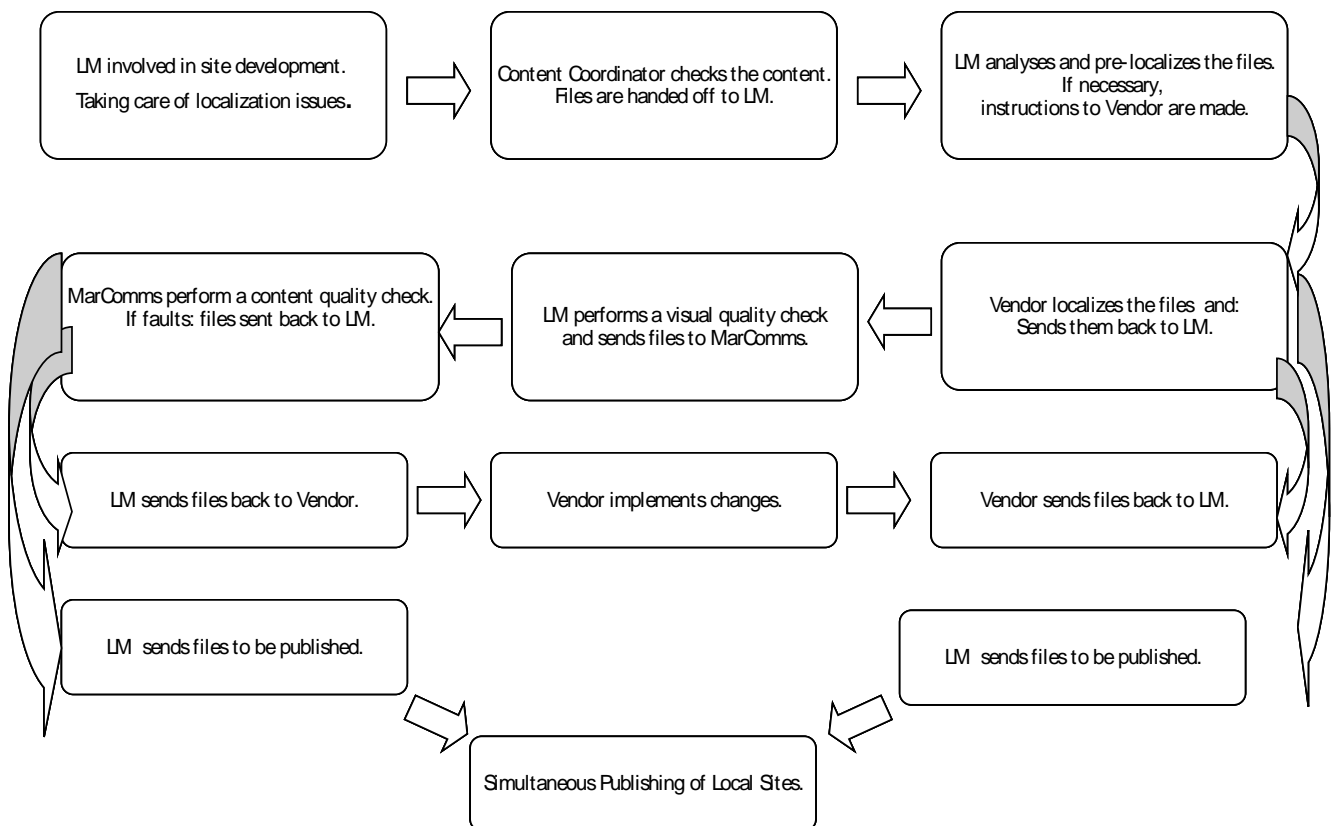
Information which was seen as having top priority among marketing representatives was included in the first track localization. I planned the localization of all languages to be executed simultaneously. The BI.com template was used as a source template and the translation was captured for further usage / updates, i.e. creation of a translation memory by using a translation tool.

For the first track content management procedure my plan suggested not to implement any globalization or content management tools. Instead the management of the source content was handled through guidelines, process description, and role determination. It had turned out that marketing and eBusiness representatives in general were not too receptive towards new tools. Therefore I suggested using tools only in process parts invisible to marketing and eBusiness representatives, such as the translation tool, and postponing the implementation of any additional tools.

During the planning and in the plan I concluded that the current static architecture of the BI.com site allowed the localization experts to use the translation tool for direct conversion and localization of the HTML files. The translation tool would freeze the template and the codes of the source site and allowed the chosen vendor of BI to easily translate directly between the codes. The company would benefit from the usage of a translation memory. I analyzed some of the existing web site files and found out that the company could save up to 71.2% in localization costs of the Scandinavian sites through the usage of a translation memory (Frisk 2000f, 5). I realized that this task required a technically skilled localization vendor to assure seamless workflow and errorless creation of the target site.

I weighed the most common translation and localization tools, and chose to look for vendors who used a translation tool that fulfilled the requirements and also seemed to be most widely in use among localization vendors. The chosen tool ensured quick and safe translation of web sites by protecting the original codes. It was also possible to translate pure .txt (text) database content by first converting the files into .rtf (rich text format). The tool supported .rtf. It worked in a Windows environment and supported languages that have localized Windows OS, including Japanese. BI employees involved in the localization process were trained to understand the logic and process of the translation tool.

After discussing different possibilities within my team and with the local marketing representatives, we agreed the flow for localization to go as follows: localization manager was involved in the site development cooperating with headquarters and web designers. Content coordinator would check the content that was intended to be published on the local sites. The localization manager would analyze the files and send them for translation. After translation, visual check would be performed by the localization manager before sending the files to the marketing managers. If no changes were needed, the files would be sent to the media agency for publishing. See details in the picture:



Picture 7: Localization process flow (LM = Localization Manager; MarComms = Marketing and Communications)

3.5.5. Vendor management – localization vendor and media agency

Major companies who have saturated the need of the local markets understand the importance of localization as part of expansion and shipping the right product to the right country in the right language.

Even with budgets becoming tighter, localization has not dropped off; it has been re-thought and considered in more detail – one of the details being the attempt to save through centralizing and limiting the number of vendors. (DePalma & Beninatto 2008, 3.)

Having the vendor meet the company's expectations and standards as well as teaching the methods and habits used is often time-consuming. Therefore changing vendors is often a difficult task. From my experience, when subcontracting, it should be made clear that the glossary and translation memory are owned by the business. In this way the glossary would be instantly usable by the new vendor. Nevertheless, it is most likely for a company to strive for a long vendor relationship to avoid this type of extra work.

Vendor management is a specific skill, which, when executed properly will flourish into a fruitful cooperation between the business and the sub-contractor. This skill is taught at some universities and institutes. The training concentrates on project management skills for professionals involved in projects regarding localization and translation, including tool usage, hiring, agreeing on contracts, and also firing. (DePalma & Beninatto 2008, 1.)

After weighing requirements and options, I preferred to engage a technically skilled localization vendor with multilingual capacity. The chosen localization vendor had to be familiar with handling tools and localizing web sites and had to possess knowledge of how to localize both technical and marketing oriented texts. They ideally had a pool of translators diversified enough for BI's needs and also flexible enough for quick translation cycles. It was essential that the vendor had in-country subsidiaries with local translators.

Within BI several media agencies were used for the creation and publishing of the content. Every country had engaged its own vendor. With the centralized approach, only one common media agency was needed for the planning of the global master frame and the publishing of all local content. I decided that in the fast track solution dynamic pages would not be used in BI's web site creation. Localization vendors were able to localize and test the static files, which then were handed over to the publishing vendor.

3.5.5.1. Finding the right vendor

At BI marketing managers were used to choose their own local translation vendors. The new process assumed a centralized localization vendor approach. Before deciding on the vendor, I tested six of the biggest multilingual localization vendors. The test consisted of already published web pages handed over to the localization agencies for translation, testing, and possible compilation / bug fixing. The vendor had to be able to handle both marketing related and technical translation together with other technicalities that come together with web localization.

It was agreed that this type of globally common pages was localized centrally, right up to the process of launching the sites. I chose a multilingual vendor (MLV) having capability to translate into all Tier 1 languages. The vendor was expected to appoint an International Project Manager (IPM) who would deal internally with the vendor's local localization offices. BI would only have one point of contact.

A separate media agency for each country was no longer needed. Instead BI could centralize the content to one agency that only created the templates once for the source site. For subsequent languages the agency simply created the directory and reserved the needed space for the target language.

Some of the files were translated as .txt source text using .rtf based conversion before and after translation. This method was used when there was an increased danger of the translator accidentally breaking the codes of the HTML pages. The .rtf files were converted further to be used for the future solid track plan where a converter would have been integrated between the content management and the translation tools.

Once localized, the content was stored for future use. Also previously localized content was retrieved by the translation tool for future reuse. Through this re-usage BI was able to drive down translation costs, speed time-to-market and ensure greater consistency across the localization process itself. I agreed with the vendor that the translation memory would be the possession of BI.

3.5.5.2. Localization kit for business and vendor

One way of supporting a seamless globalization and localization process and workflow is to create exact guidelines for both parties; therefore my plan included the creation of localization kits for both vendor and business.

The basics of the guidelines in the kit would be similar, such as instructions about handling company procedures and brand as well as general updates.

Business-specific instructions included specific information about the company web site creation, in-house content management (information flow and workflow) as well as instructions on what to take into consideration when dealing with vendors.

Vendor-specific instructions included specific information about the web site and its structure, precautions during web localization as well as instructions on how to handle updates.

Both of these kits would ensure that information was spread quickly, easily and efficiently regardless of any changes at the vendor or on the customer side. The kits were to be periodically checked and updated (at every product launch and during any other major content or template-related change).

3.5.6. Roles, responsibilities and communication

I have noticed that to ensure streamlined cooperation during the execution of a process, the roles, responsibilities, players and tasks should be discussed, agreed and communicated prior to the implementation and even prior to planning. Plans and processes are of little value if the tasks within them have not been dedicated to pre-defined people. The allocation of responsibilities between internal and external will also have an affect on the processes themselves.

I have used the following set of attributes that apply both internally and externally to ensure streamlined cooperation between all parties. These attributes are to be discussed prior / during any localization process:

- The amount of needed roles.
- The competencies needed for the roles.
- The competencies at hand.
- The effort and time needed to fulfill the roles.
- Need for external resources.
- The required competencies for the external resources.

Responsibilities between the business and the vendor need extra attention. Esselink divides the main role sets between account management and vendor management. He depicts a set of roles and tasks for both web and software localization mentioning for example that often vendors discuss directly with each other due to the high degree of outsourcing. (2000, 13-24.) Out of all outsourced tasks within web site localization, it is typically the translation that is not performed in-house (DePalma et al. 2007, 16).

The overall localization process encompasses many more roles: marketing, marketing and communication, internal customer, online marketing, product management and content management to name just a few. The precise roles and titles are of course company specific.

Prior to the common globalization and localization strategy and process the local offices had been responsible for the local content creation and for the budget of the local sites. The new way of working took the load of planning and budgeting off their shoulders. Reorganization was executed within the eBusiness team, partly as a result of the globalization and localization strategy. The work was seen as a bigger responsibility than originally planned. The teams were mixed and a web operations team was created: the responsibility and ownership of all web operations, procedures, and processes were centralized and given to me as the head of the team. Marketing managers withheld the right to accept or reject the chosen content for their local sites as well as the right to implement additional local adjustments.

It was important to focus on getting quick results, help marketing and sales with their work, and to ease up the workload. Co-operation between marketing, sales, and my web operations team was tightened. Marketing representatives felt a need to understand the big picture of localization and to be involved within the various loops of the localization process in order to be able to give local input and to gain interest in the whole workflow, process and its execution. Regular meetings were organized to ensure full information flow between marketing and web operations. Where marketing needed to understand localization issues, web operations needed to understand marketing requirements on a local level.

In addition to frequent peer-to-peer meetings, we agreed that I would participate in the monthly marketing and sales meetings. It was on these occasions where actual needs and worries were often implied and openly discussed among a bigger group of people. These meetings were also excellent surroundings to come up with mutually satisfying solutions as a team or a group, eliminating as many problems as possible beforehand.

An information link was formed between MOB / BI.com developers, content providers, web operations, marketing and sales to provide information about new launches, features, and

content. The purpose of this information link was to tighten the communication as well as to avoid gaps and eliminate misunderstandings.

Marketing and sales departments were encouraged to constantly gather and communicate local customer opinions and visions.

Sharing responsibility with local marketing ensured growing interest and commitment to contribute in and support the planned globalization strategy and localization process. The level of interest grew exponentially when introduced to decentralized, local empowerment.

Roles within the newly-created company had been somewhat overlapping and unclear. In accordance with the reorganization, there was a clear definition of roles and responsibilities to avoid double work and to assure that there was a clear decision-making body for daily tasks as well as for conflict situations. The best process will not work if roles are not clarified, agreed on, and described in a written form.

The roles for web operations were agreed as follows:

Head of web operations:

- Responsible for all BI eBusiness web operations
- Leads the team

Globalization manager:

- Responsible for and owns the globalization and localization strategy, frame, processes, procedures as well as vendor selection and relationship management
- Negotiates with local marketing about processes and procedures and keeps them up-to-date on the status
- During the localization cycle, globalization manager would participate in creating the source content and support project management

Web specialist / localization project manager:

- During the localization cycle the web specialist / localization project manager would:
 - Select and edit the material for localization from the source site
 - Work on developing navigation and structure for the local sites
 - Act as the point of contact for localization vendors
 - Provide the files that need to be translated for the vendor.

Intranet specialist:

- Will update information on the internal sales and marketing side

Call center manager:

- Is responsible for local call centers

The roles within marketing were agreed as follows:

Marketing managers:

- Approve the localized files and give additional requirements regarding the localizable content

Internet coordinator:

- Keeps track of the wishes and expectations of the local sales and marketing departments. The Internet coordinator works closely with marketing and localization departments

BI sales contact point:

Sales managers:

- Use the information on the sites for sales purposes and rely on accurate and up-to-date information

Final decision-making in conflict situations:

Vice President of eBusiness:

- Makes final decisions in possible conflict situations

Third-party roles:

Media agency:

- Is responsible for creating web sites according to BI's globalization requirements. (Possible use of a globalization vendor when required by the size of the site)

Multilingual Localization Vendor (MLV):

- Translates content provided by BI within the agreed timeline and using the tools required
- Creates a translation memory for each language (for content management purposes)

International project manager:

- Acts as a project coordinator and single point of contact to BI

I was appointed to head the web operations team, which would take care of all web efforts on a global level, supporting local markets. It was agreed that the newly-appointed localization project manager would be globally responsible for managing the localization at the BI site and for passing the localized pages on to the local BI marketing department to be verified.

After that, the pages were either launched or sent back to the vendor for correction / alteration. The marketing department would send the alteration request to the localization / web specialist.

4. Conclusion

Although people in the localization and globalization industry have been discussing web site globalization since the beginning of the millennium and software localization since the 90s, it is still a difficult concept for companies struggling with new product lines, product portfolios, and target markets

In this thesis we discussed the terminology needed to understand the broader concept of localization and globalization with the notion that the terminology might still be a bit unclear both among the scholars and practitioners and especially so between scholars and the business. Localization for business tends to be closely tied to the sellable product at hand and enabling the product to appear on several markets and locales, respecting local business rules. Based on my later experience this difference still exists.

During the case study itself it became clear that there is a significant difference in understanding the requirements and even the act of localization depending whether you look at the dilemma from the perspective of an LSP (Localization Service Provider) or from the business perspective.

The actual localization process did not start with a quick definition of details but rather with a tedious long-term study and negotiation of what is understood and expected by whom and where. The lack of common terminology was a big caveat. It took a while for all parties to understand that they were in fact talking about slightly different things, when discussing localization, what it meant, and what the prerequisites were. In some countries localization would seem to mean local recreation where the information resides on and builds upon the local level without taking existing commonalities into account or benefiting from a common source on both the textual and the design level. Interestingly enough the business managers and I as the localization manager were originally looking at the subject of localization from completely different angles. In retrospect the terminology discussion should have started even earlier and should have gone more into the details in regards of the whole concept of localization. When presenting plans and findings I had made general assumptions, which would have assumed that the business side was aware of some of the basics at the localization vendor side.

Communication – based upon a common terminology, understanding the common goals within the business, the corporate, and the world of web – proved to be key factors in getting people on the same side and gaining mutual understanding. Listening, asking questions and listening again proved to be good qualities and prerequisites for web site globalization and localization. Although Satama had created the questionnaire and consolidated the answers to what seemed like a pretty clear strategy, the face-to-face discussions I had with the stakeholders following the questionnaire proved differently. Many meetings were required to secure a solution that would be accepted by all parties.

A multinational company will inevitably benefit from establishing local web sites and should analyze the need for common and local elements to be able to identify the need for a mix of a global and a local approach. Even in a multinational corporate localization methods and processes can be unclear, they might differ from each other and streamlining throughout the corporation might have been neglected – either due to a lack of understanding or capability to consolidate.

We took a look at some basic elements within the process of localizing ergo globalizing a web site. A localization process is not a simple task and it is never exactly the same although some basic rules apply: the need to understand the target audience and the target state – the reasoning why something is started and what the company, the organization or a team wants to achieve with it, the roles and responsibilities as well as the recurring tasks.

When starting localization, the local marketing managers had started individual localization efforts, some of them comprising of more, some less information. There was no common approach. Lack of understanding the true needs and ramifications proved to be big starting obstacles. EBusiness was a buzz-word – something had to be done but what, how and in which order was unclear. Agreeing on the common elements, the grade of centralization, the concept of decentralization, the identification of the source site, the source text or the local elements were but a grey cloud. The complete lack of reuse of already translated content was a big surprise to me, whereas the possibility of reusing it surprised the local marketing managers.

When first introducing the usage of translation tools, it was not perceived as necessary. Any usage of tools was immediately regarded as cumbersome and unnecessary. First after having assured that the tools would not change the lives of marketing in any way and would be completely handled between the localization manager and the vendors, the acceptance from marketing was gained. Hard facts, such as calculations on savings through translation memory usage are well-perceived and understood. Numbers and facts are always more

impressive than general presumptions. To receive acceptance from the management a quick calculation was performed based on a few example countries: when localizing the Scandinavian sites, BI used a translation tool and managed to reduce the price of the translated material by 71%. Understanding and analyzing of the existing process proved to be a good way to gain a common understanding of the magnitude and mutual understanding.

When enabling localization, the source site will typically have to be re-created, existing ways of working are challenged, and questions will float in the planning discussions. Whenever somebody's work mode is changed or challenged, immediate resistance typically occurs. This resistance is best handled with a change management procedure predicting and anticipating basic issues related to change, for example the feeling of disempowerment. This is most likely a major reason for why so many meetings were needed to eventually reach a conclusion, which was seemingly similar to the initial assumptions made by the consultancy. It must be said that a high-level strategy still requires a lot of work to become a plan and process to be implemented. The case study shows that discussing and agreeing on common targets over one's own comfort zone benefits the common good. Agreeing on matters in a group and basing opinions on facts and existing business cases will affect and gain commitment. Best practices used within the company, corporate and in the industry can influence the mindset and speed up the acceptance process. My study on the corporate and the other companies gave BI marketing a comprehensive picture of the already existing plans and processes. For me it was handy to have backup information, which would support my plans and aspirations, in case of a problem situation. It was also good to know who to contact for questions and understanding about common procedures – or the lack of them. In our example case it was clear that influencing the corporate solutions also influenced the degree of commitment and trust on the BI level.

The localization planning started with the – seemingly – simple task of creating a local appearance for a rather young company and its products for a recently created eBusiness team. Some initiatives proved initially to be a bit drastic, for example centralizing and hiring a common translation vendor. In these situations, it was good to take a few steps back and re-discuss common targets. Otherwise the company could have found itself in a situation where procedures might have been agreed on a certain level but nobody would have followed them. Matters that seemed easy to grasp in the consolidated questionnaire summary, did not find immediate acceptance when put into action. The level of losing control had not really been anticipated.

It proved to be important to thoroughly investigate the area, the network and the products as well as the target audience and to understand the capability and willingness of the parties

involved. It was beneficial to know how and where the source material was created and published and which localization tools and methods were already in use and / or could be used. As concepts were not perceived similarly by different parties, clarity was an important part of the strategy and process creation. In retrospect I realize that I should have explained more details during every step of the planning instead of taking matters more or less for granted, for example the need to establish common elements. The global approach, i.e. addressing localization through determining common elements proved to be an unknown way of addressing localization and should have been introduced more as an option as opposed to the only way. It was evident that I had taken the results suggested in the summary of the initial questionnaires too much for granted.

The cause of common good has to be clear in every communication thread – to avoid the “not invented here” and “I feel neglected” syndromes. Even though a central approach might prove to be beneficial in localization, local teams will need local empowerment and the liberty to maintain interest in the development and updates of the site. It is essential to identify possible risks beforehand – both human based as well as business based and – especially when discussing software localization – technical risks. It is often better to restrain from too drastic technology investments in the very beginning of a process – if not seen as necessary from a strategy point of view. In the example case I performed a brief risk analysis concerning the commitment of the people involved and also included the benefits from using common tools and templates.

The expectations for the creation of the original plan – the case study – and its implementation were high although the amount of work on numerous layers from re-planning the source site to implementing tools and creating a centralized process had not been initially anticipated. It was obvious that many of the elements that changed or affected the existing process came as a surprise. The maturity and even the need of the source material were clearly underestimated.

Implementing globalization and localization aspects is an ongoing process that does not end with the once-only creation of procedures. Localization needs to be taken into account every time a change is made on the source text or application.

Cultural differences per se did not affect the planning as the source was agreed to be created as culturally agnostic as possible. Differences in the (web) culture would in some cases affect the general interest in creating any web site at all or participating in the common planning. In the case of web localization and globalization the role of culture is often turned upside down when considering the global aspect. What I mean is that typically when we talk

about translation or localization we strive to take the cultural aspects into account and implement cultural characteristics. When planning web site localization, I wanted to ensure that the source is globalized, which included striving towards a site as culturally agnostic as possible in order to streamline processes and eliminate possible problem situations.

People, regardless of whether B2B or B2C, prefer reading information in their own language and would be more inclined to buy from a site addressing them in their own language, hence the text was translated. At BI using similar templates and similar information throughout the local sites came in some cases, like the brand and navigation, quite naturally due to corporate guidelines. Exclusions and deviations were mainly due to local product range restrictions or they were about local events or contact information.

The target market, the analysis of the current state and understanding of the target state, terminology, roles, and communication are vital elements in successful web site localization and globalization. It may sometimes be difficult to leverage from existing procedures if the concept of localization and the terminology within it are not understood similarly by parties involved in the planning and integration process.

Due to the lack of common understanding about localization and its globalization aspect, the example company faced a tedious change management phase in trying to grasp the concept of globalization and centralization as part of it as something that – although time consuming in the beginning– would help them in their daily work as well as support their business needs.

5. Acronyms and terminology

APAC	Asia Pacific Area
Area	Can consist of several countries: for example APAC
ASCII	Character encoding based on the English alphabet.
B2B	B-to-B = Business to Business
B2C	B-to-C = Business to Consumers
B2E	B-to-E = Business to End User
BI	Better Internet. The case study company / unit: producing Internet security solutions.
BO	Better Objects = Mother company of BI (also part of MOB)
Character set	UTF 8, UTF 16, UTF 32. Ref to Unicode support – supporting different language sets.
CMS	Content Management Systems / Solutions
Content management	Managing content in a predefined way, usually with the help of a CMS and incorporated workflows
CRM	Customer relationship management
DIGI	Digital web site service offering downloadable assets to customers
eBusiness	electronic business = business on the web
EMEA	Europe and East Africa
End user	Customer of a product or service
FAQ	Frequently Asked Questions
GCMS	Global content management system
Global	Global comprises areas
Global content management	Content produced / sourced by global that is managed in a pre-defined manner
Globalization	See thesis
HTML	HyperText Markup Language
Internationalization	See thesis
IPM	International Project Manager
LISA	Localization Industry Standards Association
Local	On the country level
Local content management	See global content management
Localization	See thesis
LSP	Localization Service Provider
Media agency	Vendor / Third party / Subcontractor with web design and publishing capabilities

MI	Multi Innovations (an organization in the case study corporation)
MLV	Multi Language Vendor
MOB	Multi Operational Business – The Corporation
Multilizer	A software localization company
NE	Net Enterprises (an organization in the case study corporation)
R&D	Research and Development
Region	Consists of several countries in the same area / region. Size and type vary.
ROI	Return on investment
Sim-ship	Simultaneous shipping, simultaneous launch
Skopos	Scope: see Skopostheorie (Holz-Mänttari, Reiss and Vermeer)
SLV	Single Language Vendor
Target Market	In business, the market that an action, for example marketing is targeted to
Territory	An area consisting of several countries
TM	Translation Memory
TMS	Translation Memory Solution
Translation tool	Tool to support translation. Typically with a translation memory
VAR	Value Added Reseller

6. References

Ammann, Margret 1990. *Grundlagen der modernen Translationstheorie – Ein Leitfaden für Studierende*. Band 1. Translatorisches handeln. 2. Auflage. Hrs. Margret Ammann und Hans J. Vermeer, Heidelberg.

Alho Olli, Raunio Aino & Virtanen Matti 1989. *Ihminen ja kulttuuri*. 2. korj.p. Vientikoulutussäätiö, Helsinki.

Biau, José Ramon & Pym, Anthony 2002. *Technology and translation (a pedagogical overview)*. Intercultural Studies Group. Universitat Rovira i Virgili, Tarragona, Spain. Available at: http://isq.urv.es/library/papers/BiauPym_Technology.pdf.

Cadieux, Pierre 2001. I18N – Evaluating Automated Web Site Globalization Technologies. Powerpoint presentation at LISA conference in Chicago.

Cheng, Susan 2000. *Globalizing an e-Commerce Web Site*: Sprung, Robert C. (Edit.) 2000: 29-43.

CMS Watch. 2007. The Web CMS Report. *Comprehensive Product Evaluations*. Version 12. Combined Edition, Team License. To be ordered from: <http://www.cmswatch.com/CMS/Report/>.

Crick, Francis 1997. *Was die Seele wirklich ist. Die naturwissenschaftliche Erforschung des Bewusstseins*. Artemis, Munich.

Cronin, Michael 2006. *Translation and Globalization*. Routledge, New York.

DePalma, Donald A. & Beninatto, Renato S. 2008. *Localization Vendor Management. Best Practices for Managing Language Service Providers*. Common Sense Advisory report. To be ordered from: <http://www.commonsenseadvisory.com>.

DePalma, Donald A. & Joscelyne, Andrew 2005. *Beyond Global Websites. Management: Business Project and Translation Workflow*. Common Sense Advisory report. To be ordered from: <http://www.commonsenseadvisory.com>.

DePalma, Donald A., Sargent, Benjamin, B. & Beninatto, Renato S. 2006a. *Can't Read, Won't Buy: Why Language Matters on Global Websites An International Survey of Global Consumer Buying Preferences*. Common Sense Advisory report. To be ordered from: <http://www.commonsenseadvisory.com>.

DePalma, Donald A., Sargent, Benjamin B. 2006b. *Global Content Management Technology. How Well Can CMS Solutions Manage Global and Multilingual Content*. Common Sense Advisory report. To be ordered from: <http://www.commonsenseadvisory.com>.

DePalma, Donald A., Sargent, Benjamin B. & Powers, Michael R. 2007. *On the Web, Some Countries Matter More than Others*. Common Sense Advisory report. To be ordered from: <http://www.commonsenseadvisory.com>.

Dunne, Keiran J. 2006. A Copernican revolution: Focusing on the big picture of localization. Dunne, Keiran J. (Editor). *Perspectives on Localization*. 2006. American Translators Association Scholarly Monograph Series. Volume XIII. John Benjamins Publishing Company, Amsterdam / Philadelphia. 1-15.

Esselink, Bert 2000. *Practical Guide to Localization*. John Benjamins Publishing Company, Amsterdam / Philadelphia.

Fellenstein, Craig & Wood, Ron 2000. *Exploring e-commerce, global e-business and e-societies*. Prentice Hall, USA.

Hall, Kathleen & Moore, Connie 2001: *Managing Web Content for Global and Local Markets Requires a Distributed Approach*. Giga Information Group. To be ordered from:
<<http://www.forrester.com/Research/LegacyIT/Excerpt/0,7208,24255,00.html>>.

Hoffmann, Cornelia & Mehnert, Thorsten 2000. *Multilingual Information Management at Schneider Automation*. Sprung, Robert C. (Edit.) 2000: 59-79.

Hoft, Nancy 1995. *International Technical Communication*. John Wiley & Sons, Inc. Canada.

Holz-Mänttari, Justa 1984: *Translatorisches Handeln. Theorie und Methode*. Annales Academiae Scientiarum Fennicae B 226. Helsinki.

Karjalainen, Raisa Kyllikki 2008. Kaupassa pitäisi nyt viihtyä. *Helsingin Sanomat* 13.4.2008.

Kosiur, David 1997. *Understanding Electronic Commerce – How online transactions can grow your business*. Microsoft Press, USA.

LISA 2008a. About globalization. <http://www.lisa.org/Glossary.108.0.html?tid=2>. (Visited 10.4.2008.)

LISA 2008b. About globalization. <http://www.lisa.org/What-Is-Globalizatio.48.0.html>. (Visited 9.4.2008.)

Lommel, Arle 2007. *The Globalization Industry Primer. An introduction to preparing your business and products for success in international markets*. The Localization Industry Standards Association. Available at:
<<http://www.lisa.org/Globalization-indust.468.0.html>>.

Luong, Tuoc V., Lok, James, S.H., Taylor, David J. & Driscoll, Kevin 1995. *Internationalization. Developing Software for Global Markets*. John Wiley & Sons Inc. USA.

Pym, Anthony 2004. *Localization from the Perspective of Translation Studies: Overlaps in the Digital Divide?* Intercultural Studies Group, Universitat Rovira i Virgili, Tarragona, Spain. Available at: <http://www.elda.org/en/proj/scalla/SCALLA2004/Pymv2.pdf>.

Pym, Anthony 2005. *Localization: On its nature, virtues and dangers**. Intercultural Studies Group. Universitat Rovira i Virgili, Tarragona, Spain. Available at:
http://www.tinet.org/~apym/on-line/translation/Localization_bergen.doc.

Pym, Anthony 2006a. *Localization, Training, and the Threat of Fragmentation*. Version 2.1. Intercultural Studies Group. Universitat Rovira i Virgili, Tarragona, Spain. Available at:
http://www.tinet.org/~apym/on-line/translation/Localization_monterey.doc.

Pym, Anthony, Perekstrenko, Alexander, Staring, Bram 2006b. *Translation Technology and its Teaching*. Intercultural Studies Group. Universitat Rovira i Virgili, Tarragona, Spain.

Pym, Anthony 2004b. *The Moving Text. Localization, translation, and distribution*. John Benjamins Publishing Company, Amsterdam / Philadelphia.

Pym, Anthony 2006b. *What Localization Models Can Learn From Translation Theory*. Revised version. Universitat Rovira i Virgili, Tarragona, Spain. Available at:
http://www.tinet.org/~apym/on-line/translation/localization_translation_theory.pdf.

Raisch, Warren D. 2001. *The e-Marketplace*. McGraw-Hill. New York.

Rogowski, Ron, with Bodine Kerry & Geller Steven 2006. *Five Ways To Improve Your Global Web Presence*. Best Practices. Burton Group Report. To be ordered from:
<http://www.forrester.com/Research/Document/Excerpt/0,7211,40987,00.html>.

Rosenoer, Jonathan, Armstrong Douglas & Gates J. Russell 1999. *The Clickable Corporation. Successful Strategies for Capturing the Internet Advantage* The Free Press, New York.

Sargent, Benjamin B. & DePalma, Donald A. 2007a. *Unleashing the Global Customer Experience. What 500 Global Websites tell us About Improving Customer Interactions*. Common Sense Advisory report. To be ordered from:
<http://www.commonsenseadvisory.com>.

Sargent, Benjamin B. & DePalma, Donald A. 2007b. *Translation Management System Scorecards*. Common Sense Advisory report. To be ordered from:
<http://www.commonsenseadvisory.com>.

Sargent, Benjamin B. & DePalma, Donald A. 2006. *Translation Management Technology. Managing Workflow for Multilingual Publishing and Website Globalization*. Common Sense Advisory report. To be ordered from: <http://www.commonsenseadvisory.com>.

Siegel, David 1997. *Creating Killer Web Sites*. Second Edition. Hayden Books, USA. Silvgren, Alme 1998. Marketing. Lecture in Marketing Management. Helsingfors Handelsläroverket.

Software Globalization Framework – User's Guide 2001. Multilizer.

Sprung, Robert C. (Edit.) 2000. *Translating into Success: Cutting-Edge Strategies for Going Multilingual in a Global Age*. Case Studies in Business and Language. American Translators Association Scholarly Monograph Series. Volume XI. John Benjamins Publishing Company, Amsterdam / Philadelphia.

Sterne, Jim 1996. *Customer Service on the Internet – Building Relationships, Increasing Loyalty and Staying Competitive*. Schowalter, Katherine, USA.

Stolze, Radegundis 1997. *Übersetzungstheorien – Eine Einführung*. 2. Auflage. Gunter Narr Verlag, Tübingen.

Topping, Suzanne 2000. *Shortening the Translation Cycle at Eastman Kodak*. Sprung, Robert C. (Edit.) 2000: 111–125.

Uren, Emmanuel, Howard, Robert & Perinotti, Tiziana 1993. *Software Internationalization and Localization – an Introduction*. Van Nostrand Rheinhold, USA.

Vermeer, Hans J. 1986. *Voraussetzungen für eine Translationstheorie – einige Kapitel Kultur- und Sprachtheorie*. Hans J. Vermeer, Heidelberg.

Viesse, Angela & Freitas, Paige 2000a.

http://www.microsoft.com/backstage/bkst_column_24.htm. (Visited 20.4.2004.)

Viesse, Angela & Freitas, Paige 2000b

http://www.microsoft.com/backstage/column_3.htm. (Visited 20.4.2004.)

Viesse, Angela. <http://www.e-globalcom.net/en/puzzle/language.asp>.

(Visited 10.4.2008.)

DEUTSCHE KURZFASSUNG

Universität Tampere
Institut für Sprach- und Translationswissenschaften
Translationswissenschaft (Finnish-Deutsch)

FRISK, MAIKKI: Globalisierung und Lokalisierung von Webseiten – Ein multinationales Unternehmen auf dem Weg zum globalen eMarktplatz

Magisterarbeit: 72 Seiten; Deutsche Kurzfassung: 12 Seiten

1. Einleitung: Persönlicher Hintergrund und Erfahrungen im Berufsleben

Ein multinationales Unternehmen das Geschäfte über das Internet und außerhalb seiner eigenen Grenzen abwickeln will, muss sich global orientieren und dabei lokal denken: eine Strategie für die Globalisierung und Prozesse für die Lokalisierung entwickeln. Die Strategie umfasst die Identifizierung und das Verständnis des Zielmarktes sowie Entscheidungen in Bezug auf die Kundensegmentierung. Für das Verständnis des richtigen Zielmarkttyps ist eine neue Art der Segmentierung – über die reine Demographie hinaus – erforderlich.

Bereit seit 1983 bin ich in der Übersetzungsbranche tätig, nachdem ich zunächst das Übersetzungswesen als Wissenschaft und Fertigkeit studierte und dann meine ersten Übersetzungs- und Dolmetschaufträge als Freiberuflerin generieren konnte. Mehrere Jahre lang waren Übersetzungs- und Dolmetschaufträge meine Haupteinnahmequelle. Erstaunlicher Weise waren die Kunden sich nicht immer im Klaren darüber, was genau sie in Bezug auf die Übersetzungen wollten oder wer die entsprechende Zielgruppe bilden sollte. Oft habe ich meinen Kunden geholfen, ihre Zielgruppe zu segmentieren, was sehr interessant und äußerst anspruchsvoll war, z.B. wenn die Zielgruppe aus Englisch sprechenden Personen bestand.

Mitte der 90er Jahre kam ich durch meine Tätigkeit als Übersetzerin in einem Unternehmen, das sowohl Übersetzungs- als auch Lokalisierungsdienstleistungen anbot, allmählich mit dem Bereich der Softwarelokalisierung in Berührung. Da Softwarelokalisierung mehrere Schritte zur Anpassung der Software an den Zielmarkt und die Zielsprache umfasst, wurde die eigentliche Übersetzungsarbeit lediglich als ein Teil des Lokalisierungsprozesses angesehen, in dem ausschließlich der Text mit dem gleichen Informationsinhalt in eine andere Sprache übertragen wird. Gemessen an dem, was ich zuvor gelernt hatte, bedeutete

dieses Übersetzungskonzept einen gewaltigen Rückschritt, da die Freiheit und die Kreativität des Übersetzers beschränkt wurden.

Ende der 90er Jahre wurden Weblokalisierung und Globalisierung ein branchenbeherrschendes Thema. In Bezug auf die Anforderungen an die Übersetzungstätigkeit unterschied sich die Web- nicht von der Softwarelokalisierung.

Im Jahr 2000 wechselte ich von einem Lokalisierungsanbieter zu einem Auftraggeber. Dort war meine Aufgabe die Erstellung eines Lokalisierungsplans für den Internetauftritt des neu gegründeten multinationalen Unternehmens. Das Konzept der Lokalisierung wurde im Wesentlichen durch finanzielle Aspekte geprägt: Was, wann, warum und wie sollten die Produkte auf den Webseiten präsentiert werden, um so viele Kunden wie möglich zu gewinnen? Übersetzung war nur ein „sprachlicher Unterschied“, der in der Planungsphase und für die Produkterstellung als nicht wirklich wichtig erachtet wurde – sie war eher nebensächlich.

Meine vielfältigen Berufserfahrungen haben mir erlaubt verschiedenste Aspekte und Blickwinkel der Übersetzungsarbeit kennen zu lernen. Angefangen von meiner Anfangszeit als Übersetzerin, wo Übersetzung als spezifisches Können und spezielle Fertigkeit – fast als Kunstform – galt, wo der Text eine bestimmte Botschaft zu vermitteln hatte, die von einer Ausgangskultur in die Zielkultur übertragen wurde und damit einen Skopos hatte. Bis hin zu der Zeit, in der ich Übersetzung als Sprachäquivalenz innerhalb der Lokalisierung erlebt habe, wo Lokalisierung die Erstellung eines lokalen Produktäquivalentes innerhalb einer Umgebung bedeutete, in der Lokalisierung als eine Menge von Geschäftsregeln angesehen wurde.

2. Zielsetzung

In dieser Magisterarbeit werde ich auf die Prinzipien der Globalisierung und Lokalisierung einer Website anhand einer Fallstudie eingehen und dabei auf meine Erfahrung in den Branchen Webglobalisierung, Lokalisierung und Content Management zurückgreifen. Diese sind faszinierende Elemente beim Web-Publishing, nicht zu letzt wegen der Varianz in der Terminologie und der Verhältnisse der Konzepte und Konzeptteile.

Bei dieser Fallstudie geht es um ein neu gegründetes IT-Unternehmen, das Geschäfte auf globaler Ebene abwickeln will. Der ursprüngliche Lokalisierungsplan – der als Fallstudie dient – wurde im Jahre 2000 von mir aufgestellt.

III

Ein Unternehmen, das eine lokale Präsenz aufbauen will, ist sich der Hindernisse während der Planung sowie der kontinuierlichen Arbeit, die ein Lokalisierungsprozess erfordert, nicht immer bewusst. Unternehmen hatten möglicherweise eine Idee von dem Ergebnis, jedoch keine echten Fachkenntnisse bzw. keinen detaillierten Plan, wie dieses erzielt wird.

Lokalisierung als Konzept wird von den verschiedenen Beteiligten, die in die verschiedenen Aufgaben und Prozesse innerhalb der Lokalisierung involviert sind, nicht unbedingt in derselben Weise verstanden; die Bedeutung wird oft durch die Zuständigkeit und den Status der jeweiligen Person oder Einrichtung beeinflusst.

Diese Magisterarbeit setzt sich als Ziel ein Modell der Web-Lokalisierung zu beschreiben. Nachfolgend werde ich die während der Planungsphase auftretenden Probleme erläutern. Viele der Probleme können durch professionelle Planung rechtzeitig vermieden werden, obgleich man letztlich nicht auf Alles vorbereitet sein kann. Überraschungen wird es immer geben. Diese Arbeit soll auch dazu beitragen, die Verhaltens- und Gedankensweisen der Lokalisierungsexperten auf der einen Seite und die des Produktmanagements auf der anderen Seite besser zu verstehen. Die Probleme, denen man beim Denk- und Planungsprozess gegenüber steht werde ich für die Experten im Gebiet Übersetzungswissenschaft näher beleuchten. Ich werde die anfänglichen Annahmen und die Einleitung des Prozesses erläutern, den ursprünglichen Globalisierungs-/Lokalisierungsplan während seiner Erstellung kommentieren, die Denkprozesse erläutern die zu den gewählten Wegen geführt haben, sowie Lösungswege für Hindernisse, die in einem typischen mehrsprachigen Unternehmen, das nach globalen Geschäften strebt, auftreten aufzeigen.

Ich betrachte die Problematik aus der Sicht eines Produkt- und Dienstleistungsanbieters, wodurch auf die Aufgaben der Lokalisierungs- oder Übersetzungsanbieter nur kurz eingegangen werden kann.

Der erste Teil der Studie konzentriert sich – abgesehen von Einführung, Umfang, Material und Methoden der entsprechenden Terminologie - auf Globalisierung, Internationalisierung, Content Management, Lokalisierung und Übersetzung als Bestandteil der Lokalisierung.

Ich werde gemeinsame Elemente in einem Lokalisierungsprozess zur Globalisierung einer Website beschreiben, wie beispielsweise das Verhältnis zwischen Globalisierung und Lokalisierung, die Vorteile eines globalen Lokalisierungsansatzes und einer globalen / lokalen Präsenz.

Der zweite Teil konzentriert sich auf eine praktische Fallstudie, in welcher die gewählten Wege unter Vergleich mit den theoretischen Annahmen untersuchen und beschrieben werden.

Als Teil der Fallstudie werde ich die Ausgangssituation der Website des Beispielunternehmens, die Zielgruppen sowie die Prioritäten beschreiben. Ich werde auf einige Lösungswege, die in den verschiedenen Teilen des Gesamtunternehmens bereits umgesetzt wurden, näher eingehen sowie Rollen, Anforderungen, Prozesse, Lieferantenauswahl und Gesamtrisiken besprechen.

3. Material und Methode

Ich werde die Globalisierungs- und Lokalisierungslösung einer Webseite untersuchen und beschreiben. Die ursprüngliche Planung fand in einem Unternehmen, das Sicherheitsprodukte für den Internet-Bereich anbot, statt. Sämtliche Anhaltspunkte eines Lokalisierungsprozesses werden anhand dieser Lösung klargestellt. Ich habe den ursprünglichen Plan und die Prozesse von August bis November 2000 erstellt. Ich sollte der neugegründeten Firma BI (Better Internet) helfen, die Web-Präsenz zu etablieren um die B2B (Business-to-Business) Kunden in den vorherbestimmten Tier 1 Ländern zu errichten. Diese Länder waren zunächst: Finnland, Deutschland, Schweden, Großbritannien, Frankreich, Dänemark und Norwegen. Japan wurde später hinzugefügt. Der Plan, der Planungsprozess sowie meine persönliche Erfahrung während des Prozesses dienen als Hauptquelle der Fallstudie. Ich werde Elemente vor, während und nach der Planungsphase besprechen.

Um die Weblokalisierung und die Globalisierung besser planen sowie um die Geschäfts- und die Lieferantenseite innerhalb eines Lokalisierungsprozesses besser verstehen zu können, habe ich mich mit Theorie und Praxis von Lokalisierung, Übersetzung, Globalisierung und Content Management vertraut gemacht. Ich habe die relevante Literatur und die relevanten Publikationen studiert und auch mehrere Seminare weltweit besucht – sowohl als Teilnehmerin wie auch als Rednerin.

Über die besten Methoden und die allgemeinen Vorgehensweisen in der Lokalisierungs- und Globalisierungsbranche habe ich mich mit Hilfe von den Publikationen von Common Sense Advisory (CSA) vertraut gemacht. CSA ist eine in der Branche gut bekannte Research- und Consulting-Firma. Zu dem habe ich sämtliche Publikationen von LISA (Localization Industry

Standards Association) studiert und mich mit der Literatur und den besten Methoden des E-Commerce und E-Marketing bekannt gemacht.¹

Alle Ergebnisse in dieser Fallstudie beziehen sich auf den Globalisierungs- und Lokalisierungsplan (Frisk 2000g). Der Plan basiert auf folgende Elemente und Informationen:

- Eine zusammenfassende Präsentation von Fragebögen die eine Beratungsfirma (Satama) per E-Mail geschickt und die von lokalen Marketing und Online Managern beantwortet wurde. Die Fragen waren so strukturiert, dass die Elemente, die wichtig für die lokalen Marketing Manager schienen, herausgestellt und konsolidiert werden konnten. Sie wurden z.B. gefragt welche produktbezogenen und welche firmenbezogenen Informationen lokal wichtig waren. Die Fragen wurden in der Zeit von Juli bis August 2000 beantwortet. Es wurden sechs lokale Marketing Manager (Schweden, Finnland, Deutschland, Dänemark, Frankreich und Großbritannien) befragt. Die ursprünglichen Informationen für die Planung wurden von der Präsentation übernommen, weitere Details haben wir in wöchentlichen Konferenzen besprochen (s.u.).
- Analyse der Bedürfnisse und Fähigkeiten der BI Stakeholders (d.h. die, die als verantwortlich für den gegebenen Bereich identifiziert wurden). Dies waren hauptsächlich Marketing und Online Manager [acht lokale Repräsentanten (Schweden = 1, Finnland = 2, Deutschland = 1, Japan = 2, Frankreich = 2 und Großbritannien = 1), fünf Online Manager (2 in San Francisco und 3 in Finnland) und eBusiness Director in San Francisco]. Der eBusiness Director war für die gesamte Business Unit verantwortlich, wobei Marketing Manager für deren lokale Märkte verantwortlich und Online Manager global angestellt waren. Die von mir geführten Interviews waren inoffiziell, weil ich den Dialog in keiner Weise einschränken wollte. Auf Grundlage dieser Interviews habe ich meine eigenen Ergebnisse gewonnen und den Lokalisierungsplan entsprechend erstellt. Die ersten Besprechungen mit den Marketing und Online Managern und dem eBusiness Director fanden im August und September 2000 statt. Die Ergebnisse der folgenden wöchentlichen Gruppenbesprechungen in Espoo, Tampere, Nokia, Stockholm, San Francisco und Tokyo habe ich im Anschluss weiter ausgewertet. Als Diskussionsmaterial während der Besprechungen habe ich zwei Präsentationen erstellt (Frisk 2000b, 2000c).
- Lokalisierungsmodelle, die von der Hauptniederlassung und von den Tochterunternehmen übernommen worden waren. Um die gewählten Modelle besser zu verstehen, habe ich die entsprechenden Stakeholders interviewt. (MOB = VP of Marketing, MOB.fi = Online Manager, DIGI = Localization Coordinator, NE = Online Manger und Web Book 2 = Head of Corporate e-Marketing, Corporate Development Manager, Corporate Content Manager sowie BI = Local Marketing Manager). Die Interviews wurden ohne extra vorbereiteten Fragenkatalog durchgeführt.

¹ Es gab reichlich von Literatur über und Theorien für die Besten Lösungen für eMarketing and eBusiness, z.B. Understanding Electronic Commerce, Exploring E-commerce, Customer Service on the Internet, The Clickable Corporation, Creating Killer Web Sites, und The e-Marketplace.

Mein Ziel war es heraus zu finden, ob ich eines von den Modellen übernehmen konnte. Diese einzelnen Interviews fanden im August und September 2000 in Espoo statt.

- Vergleich der bereits veröffentlichten BI Webseiten. Der Vergleich war unformal und ermöglichte mir, mir ein Bild der derzeitigen Situation zu verschaffen. Details wurden in den Konferenzen, siehe oben, besprochen.
- Untersuchungen, die das Beispielunternehmen während der ersten Hälfte des Jahres 2000 in Auftrag gegeben hatte. Die Untersuchungen betrafen Lokalisationsprozesse, die die Konkurrenz übernommen hatten. Diese Prozesspläne dienten als Zusatzinformation (Jupiter 1999). Als Besprechungsmaterial hatte ich einige Informationen in eine Präsentation zusammengefasst (Frisk 2000a).
- Analyse der aktuellen Webseiten und ROI-Berechnungen (Return on Investment) mit Hilfe von dem Trados Übersetzungstool und Translation Memory.
- Teilnahme an Konferenzen, um die Details der derzeitigen Lokalisations- und Globalisations-Trends zu verstehen (z.B. LISA und IQPC). Speziell die Lokalisierungspläne von Microsoft, präsentiert in der IQPC Konferenz in New York im August 2000, haben mich sehr beeindruckt, insbesondere die Zentralisierungs- und Dezentralisierungsmodelle sowie gleichzeitiges Launchen von Produktinfo.
- Eigene Erfahrungen in der Übersetzungsbranche ab J1983 und in der Lokalisierungsbranche ab 1996: Verantwortung als Übersetzerin, LokalisiererIn, Projekt Managerin, Leiterin der Software- und Weblokalisierungs- und Testing-Abteilung in einem Lokalisierungsunternehmen.

4. Globalisierung/Lokalisierung

Ich sehe die Globalisierungsinfrastruktur als eine Technologieplattform ergänzt um eine Reihe von Dienstleistungen, durch die ein Unternehmen in der Lage ist, kritische Elemente des Globalisierungsprozesses effizient zu bewältigen. Diese untergliedere ich in vier Hauptbereiche: Globalisierung, Internationalisierung, Content Management und Lokalisierung. Die Beziehungen der Konzepte zueinander (siehe Bild unten):

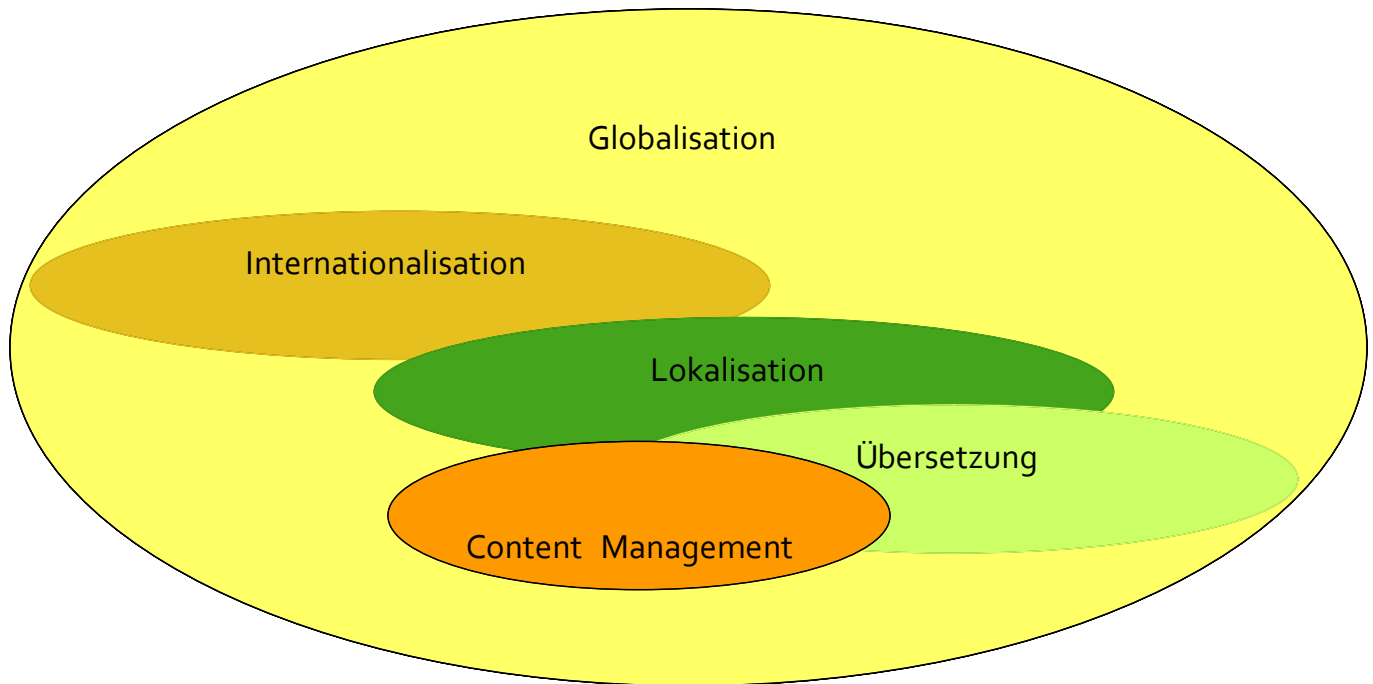


Bild : Globalisation, Internationalisation, Content Management, Lokalisation und Übersetzung

Eine umfassende Globalisierungslösung bietet eine integrierte Folge von Technologien und Dienstleistungen, die die Herausforderungen in jeder der Elemente des Globalisierungsprozesses bewältigen können. Content Management ist ein wichtiges Element innerhalb dieses Prozesses – Lokalisierung, Globalisierung und Internationalisierung sind jeweils wichtige Elemente des globalen Konzepts des Content Managements.

Der Datenzyklus, der Knowledge Management -Speicher und die gesamte Architektur des Inhaltes (Content) spielen bei der Gewährleistung eines nahtlosen Workflows eine wichtige Rolle. Obgleich viele dieser Punkte leicht in ein Content Management Tool zu implementieren sind, ist dennoch Integrationsarbeit zu leisten. Übersetzungstools sollten sich bei einer Lieferung in mehrere Länder leicht in das Content Management System einbinden lassen. (DePalma & Joscelyne 2005, 10, 12, 13-17.)

Um eine Lokalisierung zu ermöglichen, muss die Plattform internationalisiert sein. Wurde ein Produkt in der Entwicklungsphase nicht internationalisiert, kann die Lokalisierung sehr kostspielig und sogar unwirtschaftlich werden (Lommel 2007, 11). Der Wirtschaftsaspekt in einem Fall wie diesem stellt ein schwieriges Problem dar, bei dem es zu entscheiden gilt, ob ein Großteil der bestehenden und potenziellen Kunden zu ignorieren ist oder der Produktrahmen neu geschaffen werden sollte. Bei der Softwarelokalisierung kann das die Erstellung einer gründlichen Überarbeitungsversion (Maintenance Release) für die Software

VIII

bedeuten. Um eine Website-Lokalisierung zu ermöglichen, müssen Server, Systeme und Tools ersetzt werden und die ursprüngliche Website selber müsste neu erstellt werden.

Eine Lokalisierungsinfrastruktur muss eine Möglichkeit bieten, den Prozess der Content-Adaptierung auf einfache Weise zu verwalten. Die wahre Herausforderung der kulturellen Adaptierung / Lokalisierung ist nicht die Adaptierung des Inhaltes, da viele Übersetzer und Übersetzungsunternehmen derartige Dienstleistungen anbieten, sondern die Identifizierung der Mittel, um diesen Prozess schnell und effizient bewältigen zu können. Ein wichtiger Teil der Prozess- und Workflow-Generierung ist das Gesamtkonzept der Verwaltung des globalen Inhaltes und wie die Workflows – sowohl innerhalb als auch außerhalb der technischen Umgebung – organisiert sind (DePalma & Sargent 2006b, 1, 3-8).

Die Definition von Lokalisierung ist erst in diesem Jahrzehnt klarer geworden. In den 90ern, als Lokalisierung noch ein recht neuer Begriff war, war das Konzept weder einheitlich, noch klar definiert.

Bei der Lokalisierung einer Website kann Lokalisierung als Adaption einer Website und ihres Inhaltes gesehen werden – als ein Mittel zur Erfüllung der sprachbezogenen, kulturellen und politischen Erwartungen eines Landes oder lokalen Marktes (Viesse 2000a: 4).

Produktmanagement muss die frühen Entscheidungen treffen, was, wo und wann lokalisiert wird, im Gegensatz zur Lokalisierungsabteilung, die diesen Teil als gegeben hinnehmen kann und muss. Produktmanagement ist wiederum nicht in den eigentlichen Übersetzungsprozess involviert, sondern erhält das Zielmaterial zur internen Kontrolle und Genehmigung – die Genehmigungsbestimmungen folgen den Geschäftsbestimmungen. Die Gruppe von Unternehmens- und Marketingmitarbeitern, die die Aufgabe gestellt hat, ist nicht unbedingt identisch mit der Gruppe, die die Übersetzung erhält.

In dieser Magisterarbeit wird Lokalisierung aus der Weblokalisierungsperspektive gesehen, wobei die Lokalisierung mit der Definition der Kundensegmentierung und dem Verständnis des Zielmarktes, für den das Produkt ausgelegt ist, beginnt. Lokalisierung bedingt das Verständnis des lokalen Marktes, des Standortes und der Veränderung der ursprünglichen Website, so dass das Resultat so aussieht, als sei die lokalisierte Website ursprünglich für die lokalen Bedürfnisse erstellt worden. Sie umfasst lokale kulturelle Normen und lokale Geschäftsnormen, wie u. a. Währungs- und Rechtsangelegenheiten.

Während wir eine kulturell agnostische Quelle als Lokalisierungsbasis anstreben, spielt Kultur eine sehr zentrale Rolle bei der Anpassung dieses kulturell agnostischen Rahmens an die kulturell akzeptierten Normen. Kultur kann in der Planungsphase auch im Produktmanagement eine Rolle spielen. Sowohl die Weblokalisierung als auch die

Übersetzung (sofern wir diese trennen wollen) erfolgen gemäß bestimmten kulturellen Regeln.

Das Internet wird gemäß seiner Natur leicht als multikulturell empfunden. Man geht schnell davon aus, dass jeder im Internet die englische Sprache beherrscht – insbesondere, wenn er nicht Einzelkunden sondern ganzen Unternehmen Lösungen oder Produkte anbietet. Eine Sprache „Verstehen“ heißt nicht automatisch „Bevorzugen“ und „sich damit wohl fühlen“. Wir fühlen uns in der Nische, mit der wir meist vertraut sind, am wohlsten – dies gilt auch für die Sprache.

5. Fallstudie

In der Fallstudie betrachten wir die Webseiten eines multikulturellen Unternehmens das Sicherheitslösungen für das Internet anbietet und das über weltweite Niederlassungen verfügt.

BI (Better Internet) war eine Geschäftseinheit der BO (Better Objects), welche wiederum eines von drei Unternehmen der MOB (Multi Operational Business) war. Sonstige Unternehmen von MOB Corporation waren MI (Multi Internet) und NE (Net Experience). MOB, MI und NE hatten ihre Hauptniederlassung in Finnland, wobei BO und auch BI ihre Hauptniederlassung in den USA hatten. Durch Reorganisationen wurden sowohl BI als auch BO 2004 abgewickelt. Ich leitete den Lokalisierungs-Planungsprozess während der zweiten Hälfte des Jahres 2000. Die Implementierung fand im Jahre 2001 statt. Diese Magisterarbeit konzentriert sich auf die Planungsphase.

Das ursprüngliche Ziel des Lokalisierungsplans war die Generierung eines aktuellen Prozesses für die Web-Präsenz für eine bestimmte Produktpalette und eine bestimmte Marktdemographie in einem Zeitraum von drei Monaten. Bei diesem Ziel wurde davon ausgegangen, dass die Lokalisierung ein Prozess war, der ohne viel Planung eingeleitet werden konnte. Für die Hauptniederlassung bedeutete dies die Anpassung des Produktmarketings an die lokale Produktpalette, für die lokalen Marketingmitarbeiter hingegen bedeutete es die Umgestaltung der lokalen Webseiten, um die lokale Geschäftskultur und die lokalen Gegebenheiten so weit wie möglich zu berücksichtigen. Für einige Marketingmanager umfasste dieser Prozess die intensive Beschäftigung mit dem Thema Übersetzung – für andere hingegen nicht. Meine internen Kunden – die Kunden für den Lokalisierungsplan – waren die Marketingmanager.

Der bestehende Internetauftritt war eine Mischung aus partiell lokalisierten Websites und einer Mischung aus verschiedenen Layouts. Das Unternehmen benötigte eine homogenere Herangehensweise für die unternehmensweiten Websites. Zunächst wurden drei verschiedene Lösungen analysiert, von denen die am besten geeignete ausgewählt wurde:

- Veröffentlichung einer gemeinsamen Website auf Englisch für alle internationalen Niederlassungen
- Originäre Erstellung landesspezifischer lokaler Websites
- Bestimmung einer Quell-Website als Basis für alle Länder

Als Lokalisierungsmanager stellte ich ein Globalisierungs- und Lokalisierungsmodell vor, welches eine Gruppe vordefinierter Regeln und Rollen für den optimierten Prozess enthielt. Zusammen mit den Marketing Managern wurde beschlossen, dass bestimmte Elemente auf den Websites zentralisiert, wohingegen andere auf lokalerer Ebene verwaltet werden sollten. Es bedurfte einer Vielzahl von Gesprächen und Kompromissen über die Notwendigkeit der Zentralisierung sowie eines gemeinsamen Beschlusses darüber, welche Teile der Webseiten zentralisiert und welche Teile von den lokalen Marketingmanagern verwaltet werden sollen. Die Vorlagen und das Branding des Unternehmens sollten dem Branding des Hauptunternehmens folgen. Größere technische Veränderungen wurden nicht vorgenommen, da das Hauptunternehmen in Kürze neue Stileguides für die Internetseiten implementieren wollten. Bei der ersten Vorstellung des Einsatzes von Übersetzungstools wurde ein solches als nicht erforderlich erachtet. Der Einsatz eines jeden Tools wurde sofort als mühselig und unnötig abgetan. Erst nachdem den Marketing versichert wurde, dass sich hierdurch die Arbeitsweise im Marketingbereich nicht ändern und der Umgang mit den Tools komplett zwischen Lokalisierungsmanager und Lieferanten erfolgen würde, konnte eine Akzeptanz des Marketings erreicht werden.

Es wurde zudem beschlossen, die Übersetzung der BI-Webseiten zu zentralisieren und an Servicedienstleister weiterzugeben.

6. Ergebnisse und Schlussfolgerung

Der Teamgeist muss in jedem Teil des Kommunikationsweges klar erkennbar sein, um Blockadehaltungen, wie „Wurde hier nicht entwickelt“ und „Ich fühle mich übergangen“, zu vermeiden. Obgleich sich ein zentraler Ansatz als vorteilhaft für die Lokalisierung erweisen kann, müssen lokale Teams über lokale Vollmacht und Entscheidungsfreiheit verfügen, damit sie weiterhin an der Entwicklung und Aktualisierung der Website interessiert bleiben.

Die ursprüngliche Lokalisierungsplanung begann mit der Aufgabe, dass das kürzlich zusammengestellte eBusiness-Team eine lokale Web-Präsenz für ein junges Tochterunternehmen eines schon länger bestehenden Hauptunternehmens und seiner Produkte entwickeln sollte. Einige Lösungsansätze erwiesen sich anfänglich als etwas drastisch, wie beispielsweise die Zentralisierung und die Beauftragung eines zentralisierten Übersetzungslieferanten. In dieser Situation war es von Vorteil, einige Schritte zurückzugehen und die gemeinsamen Ziele erneut zu besprechen. Ansonsten hätte sich das Unternehmen womöglich in einer Lage befunden, in der Workflows auf einer bestimmten Ebene beschlossen wurden, jedoch keiner sie befolgt hätte.

Der eigentliche Lokalisierungsprozess begann nicht mit einer schnellen Definition von Details, sondern eher mit langfristigen Verhandlungen darüber, was von wem und wo verstanden und erwartet wurde. Das Fehlen einer gemeinsamen Terminologie war ein großes Hindernis. Es dauerte eine Weile, bis alle Parteien verstanden hatten, dass sie über verschiedene Dinge sprachen, wenn von Lokalisierung die Rede war, was sie bedeutete und welche Voraussetzungen es gab. In einigen Ländern schien Lokalisierung die lokale Umgestaltung zu bedeuten, bei der die meisten Daten auf lokaler Ebene verwaltet wurden, ohne dass vorhandene Gemeinsamkeiten berücksichtigt oder dass von einer gemeinsamen Quelle sowohl auf textlicher als auch auf designspezifischer Ebene profitiert wurde. Interessanterweise betrachteten die Businessmanager und die Lokalisierungsmanager das Thema Lokalisierung anfänglich von einem vollkommen anderen Standpunkt aus. Rückblickend hätte die Terminologiediskussion sogar noch früher begonnen werden sollen und hätte, was das gesamte Lokalisierungskonzept anbelangt, auch noch stärker ins Detail gehen sollen. Bei der Vorlage von Plänen und Ergebnissen bin ich als Lokalisierungsmanager von allgemeinen Annahmen, die ich in der Lokalisierungsbranche erlebt hatte, ausgegangen. Für die Marketingmanager waren diese Annahmen jedoch nicht selbstverständlich.

Zu Beginn der Lokalisierung hatten die lokalen Marketingmanager einzelne Lokalisierungsbestrebungen unternommen, von denen einige mehr, andere weniger Datenmaterial umfassten. Es gab keinen gemeinsamen Ansatz. Fehlendes Verständnis für die wahren Bedürfnisse und Konsequenzen erwiesen sich als großes Anfangshindernis. eBusiness war ein Schlagwort – etwas musste getan werden, aber was, wie und in welcher Reihenfolge war unklar. Ein Kompromiss über die gemeinsamen Elemente, das Ausmaß der Zentralisierung, das Konzept der Dezentralisierung, die Identifizierung der Quell-Website, der Ursprungstext oder die lokalen Elemente ließen auf sich warten. Das vollständige Fehlen der Wiederverwendung vom bereits übersetzten Inhalt war eine große Überraschung für mich, wohingegen die Möglichkeit einer Wiederverwendung die lokalen Marketingmanager überraschte.

Es war interessant festzustellen, dass obgleich das Fehlen einer gemeinsamen Terminologie zu Störungen führte und die Erstellung eines gemeinsamen Plans und einer gegenseitigen Konsolidierung verkomplizierte, kulturelle Unterschiede per se die Planung nicht beeinträchtigten, da beschlossen wurde, die Quelle so kulturell agnostisch wie möglich zu halten. Unterschiede in der (Web-)Kultur beeinträchtigten in einigen Fällen das allgemeine Interesse an der Erstellung einer Website oder die Teilnahme an der allgemeinen Planung. Bei der Weblokalisierung und -globalisierung wird die Rolle der Kultur bei der Betrachtung des globalen Aspekts häufig auf den Kopf gestellt. Damit meine ich, dass wir uns üblicherweise, wenn wir von Übersetzung oder Lokalisierung sprechen, bemühen, kulturelle Aspekte zu berücksichtigen und kulturelle Eigenschaften zu implementieren. Bei der Planung einer Website-Lokalisierung müssen wir sicherstellen, dass wir die Quelle globalisiert haben, d. h. wir streben danach, so kulturell agnostisch wie möglich zu sein, um Prozesse zu optimieren und mögliche Problemsituationen schon im Vorhinein zu vermeiden.

Somit darf der Schluss gezogen werden, dass Zielmarkt, die Analyse des aktuellen Status und das Verständnis des Zielstatus, Terminologie, Rollen und Kommunikation wichtige Elemente für die erfolgreiche Website-Lokalisierung und -globalisierung sind. Die Terminologie und die Konzepte können möglicherweise anders von den verschiedenen Seiten, die am Planungs- und Integrationsprozess beteiligt sind, verstanden werden. Durch das fehlende Verständnis der Lokalisierungsbranche und -prozesse hat sich das Beispiels-Unternehmen einer mühseligen Änderungsphase gegenübergesehen. Während dieser Änderungsphase hat sich das Unternehmen eine neue Vorgehensweise hinsichtlich Weblokalisierung und -globalisierung angeeignet. Obgleich es anfangs zeitaufwändig hinsichtlich der Planung und Konsolidierung war, hat diese Planung den Marketingmanagern bei der täglichen Arbeit geholfen und ihre Geschäftlichen Anforderungen unterstützt.