

A brief note from the author...

Thanks for taking a moment to read a chapter from
Beyond Borders: Web Globalization Strategies.

I wanted to alert you to a new publication devoted to the art and science of Web globalization: **Global By Design**. In the past year we've profiled companies ranging from **Dell** to **NIVEA** to **Qualcomm**. It is the only publication of its kind and it is really helping companies improve their global Web sites – and their bottom lines. Subscribers now include companies such as Google, FedEx, Lionbridge, Cargill, and Dow Corning.

To download a free sample issue, simply visit:

www.bytelevel.com/globalbydesign.

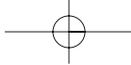
And please keep in touch regarding the key questions and issues you and your organization are facing.

Best regards,

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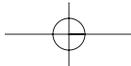
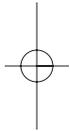
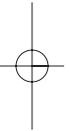


Entrées/Entrées

Visas

Departures/Sorties

<i>Entrées/Entrées</i>	<i>Visas</i>
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Entries/Entrées

Visas

Departures/Sorties

ONE INTERNET; MANY VOICES

The Internet connects computers, but it is language that connects people. If you want your web site to connect with the world, you need to create a web site that speaks to the world. This chapter introduces you to web globalization—the history, the terminology, and the reasons that web globalization is, for many organizations, inevitable.

IN THE BEGINNING, THERE WAS ENGLISH

The Internet was designed to be global, but not necessarily multilingual. Funded by the U.S. Department of Defense, its primary purpose was to enable English speakers to communicate with other English speakers; yet a funny thing happened to this American phenomenon—it became a global phenomenon. Increasingly, non-English speakers began using the Internet to communicate in their own languages. There were many obstacles, many of which are with us even today, but the trend was clear and accelerating. Just a few years ago, nearly two thirds of all Internet users were native English speakers. Today, less than half speak English as their native language. And as shown in Figure 1.1, English is on its way from being the primary language of the Internet to just another language of the Internet.

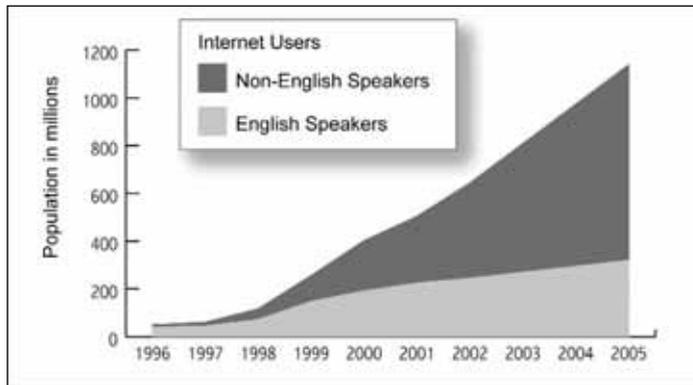


Figure 1.1 Non-English speakers are becoming the dominant force on the Internet.
Source: *Global Reach*, 2001 (www.greach.com)

As more and more of the world embraces the Internet, inevitably, less and less of the world will embrace English-only web sites. The research firm IDC projects that by 2003, 36% of all Internet users will prefer to use a language other than English, up from 26% in 1999. IDC goes on to note that people are four times more likely to shop and purchase online from web sites that speak their native language.* A multi-lingual web site is, increasingly, not just a luxury, but a necessity.

The term “World Wide Web” has always been a bit of a fallacy. What’s the good of having millions of people visit your site if only a fraction can understand what it says? Would you buy from a company that didn’t speak your language? In the early days of the Internet, web users had to adapt to English-language sites because there were few alternatives. Today, web sites must adapt to the languages of their web users.

*Source: *Web Site Globalization: The Next Imperative for the Internet 2.0 Era*, IDC, 2001

Imagine a World Without English

Perhaps the best way to understand how challenging the Internet can be if you don't speak English is to pretend that you *don't* speak English. To someone who knows no English, Figure 1.2 might be a more accurate picture of what the Dell global home page looks like: nice pictures, but undecipherable text.



1.2 The English-language Dell home page, as someone who doesn't speak English views it.

Dell does, in fact, offer web sites in different languages, but if you arrive at the global home page, you must use the pull-down menu to get to those sites (see Figure 1.3). Although much of the world does recognize some English words, do you really want to assume your site visitors understand the words “Choose a Country”? This minor detail, the global gateway, is not so minor when you're building a web site for the world. Success at web globalization demands high attention to detail and the ability to look at your web site through the eyes of someone else.

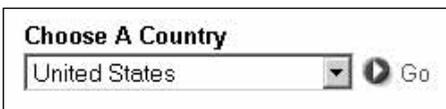


Figure 1.3 The Dell “global gateway.” Before you can get to the web site in another language, you have to know what “Choose a Country” means.

For more information on global gateways, see Chapter 11, “World Wide Design.”

Global Web Sites for Global Companies

Nike sells its products in 140 countries; last year it made more money outside the U.S. than it did within the U.S. However, in Nike's 2001 annual report, Philip Knight, CEO, set two priorities for the years ahead, one of which was to "become a truly global company."

Is Nike not already a truly global company? Perhaps not as much as it could be. The Nike web site could use a bit of improvement (see Figure 1.4). For a company that does business in 140 countries, its site offers only 13 languages—a great start, but far from what's needed. If your company sells products in Russia, Sweden, and the Middle East, would you neglect to include Russian, Swedish, Hebrew, and Arabic translations? Even just a few web pages in those languages would be better than nothing.



Figure 1.4 Nike sells its products in 140 countries, but its web site is only available in 13 languages.

A global web site is your link with customers around the world, a link that can strengthen relationships or damage them. And as more and more companies expand globally, they cannot afford to damage relationships.

Nike is not alone in its dependence on the world. Many major companies now owe a significant percentage of their revenues to the world outside their native countries, as shown in Table 1.1.

Table 1.1 American Companies in Search of Growth Need the World More Than Ever

Company (Reach)	Percentage of Sales from Outside U.S.
Symantec (37 countries)	43%
McDonald's (120 countries)	51%
Ralph Lauren (65 countries)	24%
Dell (12% global market share)	30%
Wal-Mart (9 countries)	17%
Coca-Cola	70%

Source: Statistics compiled from companies' annual reports.

Ralph Lauren was one of the first American fashion houses to go global, expanding into Japan as early as 1978, long before it had a web site. In 1982, it entered Europe, well ahead of its American competitors. Today, it does business in 65 countries, and its 2001 annual report made clear its continued global aspirations:

"Polo Ralph Lauren is a brand that knows no boundaries. It has universal appeal because it understands cultures and what it means to be a part of them."

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Globalization Is Inevitable

Any company that seeks long-term growth is bound to go global. Domestically, Coca-Cola has a 15% lead over its competitors, but outside the U.S., it enjoys a 4:1 market share advantage, and growth prospects are seemingly unlimited. In Nigeria alone, Coke products are enjoying a 39% growth rate. McDonald's is another global success story, operating in 120 countries. Although it might seem that McDonald's is in danger of running out of room to expand, it claims to feed less than 1% of the world's population on any given day. In fact, most multinational companies have only just begun to realize the potential of globalization. Consider Wal-Mart, in which 25% of its stores are located outside the U.S., yet in only nine countries. Wal-Mart, like most major companies, is just getting started (see sidebar "Wal-Mart Adapts to the World, One Country at a Time").

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Wal-Mart Adapts to the World, One Country at a Time

“Wal-Mart began operations in the world’s most populous nation in 1996, opening a Wal-Mart Supercenter and a SAM’S CLUB. China is an ideal example of how Wal-Mart synthesizes practices to adapt to the communities it serves. Wal-Mart modified its shopping bags to fit the needs of Chinese customers who usually shop daily for products and often arrive on a motorcycle or bicycle. During fiscal 2001, Wal-Mart opened a new underground store in Dalian beneath a new soccer stadium. The subterranean format was chosen to accommodate local needs and to address citizens’ aesthetic concerns.”

Source: Wal-Mart 2001 Annual Report

As Wal-Mart takes its company global, it also takes its web site global (see Figure 1.5). In a global economy, a global web site becomes a core channel for communication, sales, and support. Whether you are a multinational or simply want to function like one, you’ll need a multilingual, multinational web site.



Figure 1.5 Wal-Mart, already the largest retailer in Mexico, also has a Mexico web site (www.walmartmexico.com.mx).

Globalization Gone Bad

Thinking globally and acting globally are two different things. Time and again, companies make the mistake of assuming that what works domestically will work internationally. And time and again, they learn the hard way that every country and every culture is, in its own way, a new world.

David Ricks writes about many of the road bumps companies encounter when selling around the globe. In his book, *Blunders in International Business*, he documents some of the more humorous examples of globalization gone bad:

- General Motors ran into trouble trying to sell the Chevy Nova in Latin America. *No va* means “no go” in Spanish. When Ricks spoke to General Motors about the incident, they told him that consumers found the name so silly that they were forced to change the name to Caribe (meaning “horse”).
- Ford had an equally embarrassing problem when it tried to sell the Pinto in Brazil. *Pinto* is apparently slang for “tiny male genitals.”
- Pepsodent tried to sell its teeth-whitening toothpaste in parts of Asia where culturally one gains social prestige by having darkly stained teeth.
- Procter & Gamble marketed its Cheer laundry detergent in Japan under the familiar “all-temperature” slogan, yet the Japanese wash clothes in cold water, almost exclusively.
- The Budweiser slogan “King of Beers” was translated into Spanish as “Queen of Beers.”
- An American firm in India used a symbol of an owl in its marketing efforts only to find out that in India, an owl signifies bad luck.

Source: *Blunders in International Business*, David A. Ricks, Cambridge, MA: Blackwell Business, 1997.

Whether you use a web site or a billboard, the risks of going global are enormous. With the Internet, the pace of globalization increases rapidly. You no longer need the resources of a multinational company to have multinational reach, but you can also make the same mistakes multinationals make, and the consequences can be just as painful.

THE LANGUAGE OF GLOBALIZATION

There are a lot of specialized terms in the web globalization field, many of them inherited from the software industry (collected in Appendix A, “Glossary,” of this book). Years ago, software developers realized the profit potential of global markets and set about “localizing” their products for various markets. The terms and processes these companies pioneered carried over to web development. As the lines between software and web sites have blurred, the terms are now more relevant than ever.



Keep in mind that definitions vary widely in this industry. Don't worry if you don't grasp them at first; they'll become much more clear as you go through the process yourself. Even if you don't find yourself using these terms, they're important to know, as your vendors most certainly will use them.

Think "Locale"

A locale is a confusing concept because its definition varies depending on how it's used. On an operating system, a locale can refer to a specific combination of language, geographic region, keyboard layout, and date/time display format, to name a few. On a web site, a locale might be as simple as "Spanish."

For our purposes, a *locale* is a specific combination of language and country, such as Portuguese Brazil or English U.K. It's important not to confuse language with country or vice versa. A country such as Canada can have more than one language (French Canada and English Canada), and a language (such as Spanish or English) is often spoken in more than one country.

Of course, a locale is often linked to much more than a language and country. Many web sites offer a high degree of personalization, which requires "localization" of functionality. When developing a site for each locale, ask the following questions:

- How are dates displayed?
- How are numbers displayed?
- What currency is used?
- What are the sorting and collating rules? For example, there is no such concept as "alphabetization" in Chinese.
- How should searches work? Once again, Asian languages don't sort like alphabetic languages; they are sorted by a host of factors, such as stroke count.
- What's the text direction (left to right, right to left, horizontal, or vertical)? Arabic is a bi-directional language; text flows from right to left and numbers flow from left to right.
- What is the default paper size? Will your web pages print properly in countries where paper sizes are not 8½×11 inches? If you supply PDF files for download, will they print correctly?



- Do you ask users to enter any characters that aren't available in that given language? Keep in mind that keyboards and operating systems vary by locale.
- What is the user's technical environment? Do users have slow or fast connections? What is the typical screen resolution and processor speed? And what sort of devices do they use? In Japan, for example, people are much more likely to connect to the Internet by mobile phone, not PC.

For more information on localization, see Chapter 7, "Internationalization and Localization."

Habla Español?

Spanish is the official language of more than 20 countries; English is the official language in only 7 countries.

In general, companies tend to approach the world by "language markets" or "country markets." For example, a company translates its site into Spanish, assuming that all Spanish speakers in Spain, Mexico, Latin America, and the U.S. will be happy with it. This is rarely the case, however. Spanish varies widely in its usage from country to country and region to region. There are even clear differences between the Spanish spoken in Miami and the Spanish spoken in Los Angeles.

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Taking a purely geographic approach is also prone to error. What language do you offer when you localize your web site for Switzerland, a country with four official languages? For that matter, English falls far short of fully addressing the U.S. population, in which 32 million people speak Spanish. Which brings us back to locale—part language, part country. It's not the best system, but it's good enough for most companies as they begin going global.

For more information about Spanish localization, see "Hands On: Spanish."

Localization (L10n)

Localization is the process of modifying a product for a specific locale. This includes making technical, visual, and textual modifications to your site. All those questions you had to answer when thinking about the locale are applied during this process. The changes you'll need to make to your site include

- Rewriting text
- Translating text
- Modifying graphics
- Creating new graphics



- Changing colors
- Changing layout
- Modifying tables, forms, data fields, databases

Why L10n?

Blame software developers for the pseudo-acronym L10n. The number 10 refers to the number of letters between L and n. Similar abbreviations are used for internationalization (i18n) and globalization (g10n). These abbreviations might not be any easier to use, but be prepared to see vendors using them from time to time. Note that the L in L10n is uppercase to prevent being mistaken for the numeral 1.

Only in Basston

Localization applies to more than web sites. In Boston, several popular ads make light of the Boston accent, in which the *r* is silent and the *a* sounds more like “ah.” For example, an ad for a local car wash uses the headline: “It’s like a spa for your cah,” and a billboard for Bass Ale reads “Basston.” A question you’ll often ask as you localize your web site is “How local do you want to go; how local should you go?”

Some say a perfectly localized web site should appear to the end user as though it were created by a local company, but this isn’t always a good idea. Sometimes you want a consumer to know you’re a foreign company. French winemakers, for example, aren’t about to start pretending they’re from Ohio. The goal of localization isn’t to trick users into thinking your company is local, but to let users know that you understand their specific needs and wants. A successfully localized web site provides a consistent user experience, regardless of location or language.



Yahoo! Gets Local

Yahoo! has perfected the art of localization, regardless of whether its users are in St. Louis or Singapore (see Figure 1.16). Yahoo!, in its early days, focused its localization efforts on the U.S. It launched a Yahoo! New York, Boston, and LA, and today Yahoo! offers more than 200 Metro sites. Yahoo! also expanded across borders. Today, it has portals in 23 territories in 16 languages.

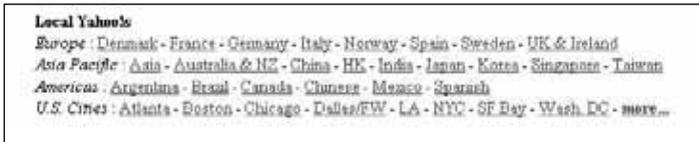


Figure 1.6 The Yahoo! local section.

For each region, Yahoo! hires a local team that manages content. This decentralized structure allows each Yahoo! portal to more easily and quickly customize content to the needs of its audience.

Internationalization (i18N)

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Internationalization is the process of building (or rebuilding) a site so that it can be easily localized. To understand internationalization, think about how car companies operate. To minimize costs and maximize customer returns, a car manufacturer, such as Honda, develops a modular design that can be customized to the needs of its various consumers and the countries they live in. Just as a web site is often built on a global template, the core design of the Honda Accord also functions as a template. The internationalized version of the Honda Accord is the template of the car, the frame on which all the DXs and LXs and EXs can be assembled. Because Honda focused first on creating an internationalized template of a car, it can more easily spin off hundreds of variations, each suited to a specific audience.

If you're planning on localizing your site for multiple languages, internationalization can save you a lot of time and money because it forces you to create a template that can then be more easily localized, instead of just localizing as you go and running into expensive problems along the way.

The i18n and L10n of Lands' End

Notice how the Lands' End U.S. and Deutschland home pages share similar navigation systems, but feature different promotions (see Figure 1.7). The internationalization stage of the development process would have entailed developing a master design that remains consistent across locales, yet remains flexible enough to allow for the necessary localization.



Internationalized components

Localized content



Figure 1.7 On both sites, navigation systems remain consistent, but on the German site, the featured Internet access promotion is unique to the German market.

continues

The i18n and L10n of Lands' End, continued

If you look closely at the German site, you'll see that Lands' End elected to continue using its trademark slogan "Guaranteed. Period." without translating it. This type of decision—deciding what to translate and what *not* to translate—is typically made in the internationalization stage. Sometimes, internationalization decisions have localized repercussions. Lands' End had to go to court to defend its use of "Guaranteed. Period." because German law prohibited advertising unconditional guarantees. Lands' End felt that this slogan, its guiding principle, was worth fighting for. Its fight paid off, as the law was repealed in 2001.

During the localization stage, the product selections, promotions, toll-free German phone number, prices, and support options are addressed. Although the two home pages might look quite similar initially, the differences are significant. Companies are increasingly designing web sites to function as "global templates" that can easily be localized for just about any country and any language. Just as Honda develops automotive bodies that can accommodate steering wheels on the left or the right, depending on the target market, web developers must create sites that can accommodate all types of text, regardless of whether it moves from right to left or left to right.

Globalization (g11n)

Globalization is commonly used as the all-encompassing term for both internationalizing and localizing a web site. In reality, however, the term is much broader still.

Regardless of whether you're adding one language or 20 languages, localizing or internationalizing, you are participating in the globalization process.

In fact, you're participating in the globalization process even if you have nothing to do with the web site. Customer support people must understand how to answer emails and calls in different languages; accounting must create prices in different currencies and then accept those currencies; salespeople must understand the nuances of the countries and cultures; and product developers and marketers must understand competition and the distribution channels. In other words, globalization is a companywide process. You can't do it alone.

Because of globalization's companywide nature, certain chapters of this book are devoted to areas that aren't necessarily web-centric: customer support (Chapter 15, "Supporting International Customers"), marketing (Chapter 16, "Promoting Your Site Globally"), and copywriting (Chapter 10, "Writing for a Global Audience").

FYI

(Some localization vendors now use the term "glocalization" because it better conveys the dual nature of the globalization process. Perhaps glocalization is the term of the future. For this book, however, I will use globalization.)

Languages Come in Pairs: Source and Target Languages

A translator typically specializes in one *source language* (such as English) and one *target language* (such as German). Rarely will you see translators manage more than one pair. Although this book largely assumes that your source language is English, this is often not the case in the real world. As sites become increasingly globalized, you might find yourself translating a French web page for an American site or a Japanese page for a German site.

Now that you're thinking like a localization expert, let's review some of the reasons your company needs to begin talking to the world in more than one language.

NUMBERS SPEAK LOUDER THAN WORDS

According to Global Reach (www.gltreach.com), the year 2000 saw the number of non-native English speakers outnumber the number of native English speakers on the Internet. Although the number of English speakers on the Internet continues to grow, the pace is slowing. Meanwhile, the number of non-English speakers continues to grow unabated.

English is hardly endangered; it is the *lingua franca* of international business and will remain so for years to come. But on the Internet, English is clearly not on the verge of becoming a *universal* language, at least not according to the analysts.

The Analysts Have Spoken

You can tell that a trend has reached critical mass when analysts in competing firms actually start agreeing with one another. For example, IDC reports several predictions for 2003, shown in Figure 1.8.

- The United States will account for less than one-third of the worldwide Internet user base of 602 million.
- Western Europe and Japan will represent 47% of all e-commerce revenue (\$764 billion).
- At least 36% of Internet users will prefer to use a language other than English, up from 28% in 1999.

Source: *Web Site Globalization: The Next Imperative for the Internet 2.0 Era*, IDC, 2001



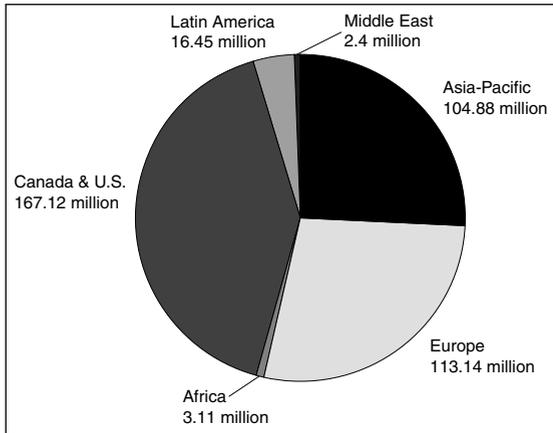


Figure 1.8 Who's online?
 Source: Data compiled from multiple sources by Nua Internet Surveys, November 2000

The Aberdeen Group followed with a few predictions of its own, also for 2003:

- By 2003, 68% of web users will be non-English speakers.
- By 2003, 66% of all e-commerce spending will originate outside the U.S.
- More than 20% of web traffic on U.S.-based sites originates from outside the U.S.

Additionally, Aberdeen broke down the growth in Internet usage by region, as shown in Figure 1.9.

Region	Internet Users	Growth Rate	% of Total Population
North America	171,000,000	14%	34.3%
Latin America	37,600,000	48%	7.6%
Western Europe	24,100,000	24%	22.5%
Eastern Europe	6,100,000	51%	4.8%
Africa	6,100,000	48%	1.2%
Middle East	8,500,000	61%	1.7%
Asia/Pacific	138,800,00	39%	27.9%

Figure 1.9 Projected Internet usage through 2003.
 Source: Web Globalization: Write Once, Deploy Worldwide, Boston: Aberdeen Group, May 2001.



What do all these numbers add up to? A pretty strong case for web localization. American companies in search of e-commerce growth have little choice but to look outside the U.S. Compare the 14% growth rate domestically with the 39% growth rate in Asia.

Currently, English is still a dominant language on the Internet, but every day, other languages grow more popular. The issue isn't that English is growing less popular, but that more and more of the world is going online, and more often than not, they don't speak English (see Figure 1.10).

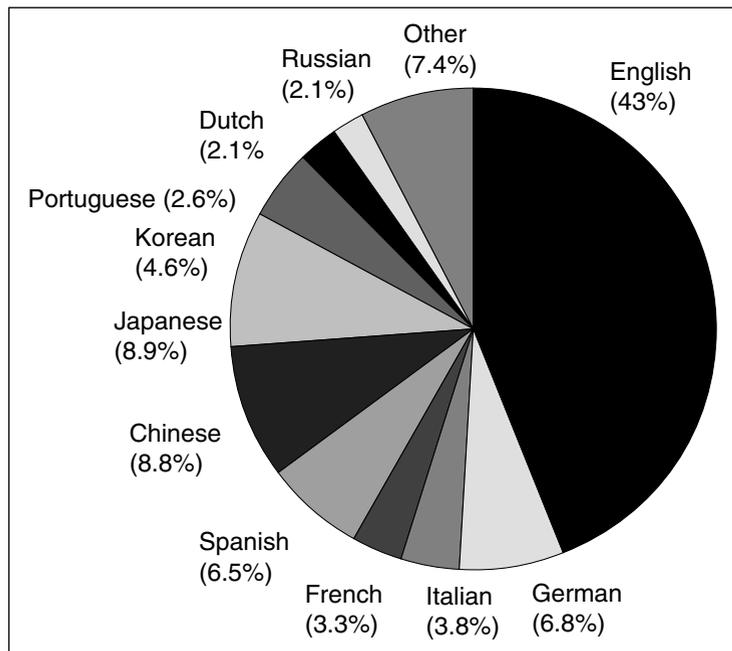


Figure 1.10 The most popular languages of web users.
Source: Global Reach (www.greach.com)

So what language will dominate the Internet in the future? According to the World Intellectual Property Organization (WIPO) and the International Telecommunications Union (ITU), Chinese will outrank English as the most-used language on the Internet by 2007.



Not All Languages Are Localized Equally

Just because Chinese is destined to dominate the Internet doesn't mean you should rush off and hire Chinese translators. Chinese is a very difficult language to localize for. Many organizations select target languages with little thought to how challenging or expensive those languages might be. If your organization is new to localization, you probably don't want to pick the most challenging language as your first target language.

The chart in Figure 1.11 rates the relative difficulty of localizing an English U.S. web site into various languages. Each ranking, on a scale of 1 to 10, takes a number of factors into account: complexity of language and culture, talent pool, costs, readily available tools. As you can see, Chinese is a lot more challenging than Spanish.

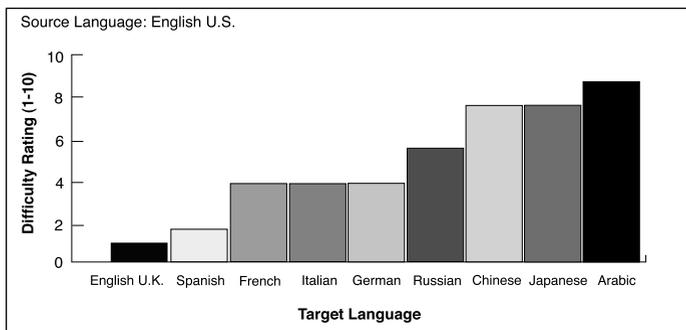


Figure 1.11 Some languages are tougher than others.

The Hands-On chapters in this book will demonstrate how to localize for eight of the nine languages on this chart. You'll begin with Spanish and work your way up the difficulty ranking until you reach Arabic.

WHO'S GOING GLOBAL?

Roughly half the Fortune 500 companies have developed localized web sites, but less than half of these efforts can be considered anywhere near comprehensive. Most companies have yet to fully embrace web globalization, which is good news for companies that have yet to begin.



Going global doesn't necessitate localizing a web site into every written language; it just means localizing into the necessary languages. The following two examples illustrate how diverse your needs may be. In one example, a multinational built 36 localized web sites; in the other, a nonprofit organization built just two sites. There's no right or wrong solution—only the solution that works best for your organization and your audience.

The Big: Mazda

Mazda's home page is an extensive global gateway that leads to 36 localized web sites (see Figure 1.12). Table 1.2 illustrates the full extent of Mazda's web globalization efforts.

Table 1.2 Mazda: 36 Localized Web Sites and Growing...

Americas	Europe		Asia	Africa/Middle East
Argentina	Austria	Italy	Australia	Kuwait
Canada	Belgium	Netherlands	Hong Kong	Oman
Columbia	Croatia	Poland	Japan	South Africa
El Salvador	Czech Republic	Portugal	New Zealand	
Honduras	Denmark	Slovakia	Taiwan	
Puerto Rico	Finland	Slovenia	Thailand	
U.S.	France	Spain		
	Germany	Switzerland		
	Greece	Sweden		
	Hungary	U.K.		

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Figure 1.12 The Mazda English-language home page.

Managing all these sites requires enormous resources, and the list is sure to grow. Mazda, after all, is just one brand in the Ford family. If you were to include the number of localized web sites for each Ford brand, the total quickly exceeds 100 localized web sites.

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And the Not So Big: The Software Human Resource Council

You don't have to be a multinational to have a multilingual web site. The Software Human Resource Council (SHRC) is a nonprofit organization based in Canada, serving both French and English speakers (see Figure 1.13). Canada requires that organizations offer both French- and English-language web sites.



Figure 1.13 The SHRC gateway.



The site's home page is a simple and effective gateway; both localized versions, shown in Figures 1.14 and 1.15, are fully translated. Even the acronym is translated, from CHRC in English to CRHL (Conseil des ressources humaines du logiciel) in French.



Figure 1.14 The SHRC English-language home page.



Figure 1.15 The SHRC French-language home page.

You don't have to localize your web site into a dozen languages to be successful, and you don't need to be a multinational. You just need to get started.



MOVING FORWARD: MANY INTERNETS, MANY VOICES

In the end, web globalization isn't just about translating one site; it's about creating entirely new web sites. The challenges extend well beyond language and require the support of your entire organization. Yet despite the obstacles, globalization is hard to resist—if not just to expand market share but to prevent others from taking your market share. In a global economy, if your company (and your web site) ignores the world, the world will ignore you. In the next chapter, you'll learn how so many languages coexist on the Internet and how you can effectively navigate around them.

