

The State of Localization

A CENTIFIC REPORT

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Introduction



The field of localization has evolved rapidly. But has it "arrived"?

On the one hand, localization is integral to most business's global growth aspirations. If you're a business that aspires to expand its operations across multiple countries, you can't afford to ignore localization.

Language services was estimated to grow to more than \$57 billion by the end of 2022. This growth makes sense: globalization is as strong as ever, and as businesses increase their presence across hundreds of countries, being able to communicate with customers who do not speak the same language is a fundamental need. But localization is more than language services, and localization done poorly can undercut a brand's global growth by alienating potential customers.

Localization encompasses many moving parts, including the user experience – the basic user interface, choice of sound and color palettes for a site, and yes, language. In short, localization is about creating lovable experiences everywhere.

Localization still has a long way to go. According to a recently published survey of European consumers, 57 percent had experienced cultural problems while using a UK brand's local website; 24 percent of this group said these issues reduced purchase likelihood. Fortunately, the

overall state of localization is making tremendous strides and becoming impossible to ignore in the news, whether it's Google's cloud-based translation hub or Meta's new AI tool for translating primarily oral languages.

Where Localization is Headed

Our new report takes a close look at the state of the industry, ranging from the impact of the COVID-19 pandemic to the challenges that businesses face when localizing products such as voice assistants that use artificial intelligence. We've tapped into the thinking of some of our best subject matter experts to provide thoughtful insights into where localization is headed in 2023. This report is written for professionals who believe in



the power of localization to solve business problems – or who are curious about its positive impact. We've based our thinking on our

experiences helping businesses build global brands across hundreds of markets in some cases. The practitioners who've contributed essays have strong first-hand experience collaborating with clients, localization teams, and technologies such as our OneForma platform to scale localization efforts.

Thank you for your interest in our report. I hope you find it useful and enlightening. As always, contact us at Centific with your own thoughts and questions.

Localization in an Economic Downturn



Businesses around the world are managing through an economic downturn that just gets worse by the day. In the fourth quarter of 2022, the International Monetary Fund (IMF) <u>predicted</u> that global growth would slow to 2.7 percent in 2023. The IMF also said the world economy was "historically fragile," and the financial markets were "showing signs of stress."

Businesses, seeing the bumpy road ahead, are under more pressure than ever to cut costs and operate more efficiently, while maintaining quality and protecting time to market. What does that mean to their localization efforts? And how can localization help a business not only survive a recession but also manage to improve their globalization efforts?

Here are two trends:



Localization is effective at helping companies expand into new and bigger markets.

Many companies are targeting overseas markets for growth. That's because in a downturn, it is common for global businesses to try to press their advantage over competitors by achieving economies of scale. But doing so is enormously challenging amid supply chain disruptions and geo-political instability that threatens the free flow of goods and services.

Global companies that already serve multiple local markets have an advantage because it is less expensive to grow an existing infrastructure than to build new markets from scratch. That's why now is the time to lean into localization – and here's why: Localization makes a company more relevant in the markets it serves and is necessary to expanding your existing customer base in diverse markets. After all, approaches that work in the United States won't succeed as well in Spain or Japan and vice versa. For more on this, read Jonas Ryberg's post, "What Is the Future of Globalization"



Outsourcing large-scale localization projects will become normal for brands.

With workforce reductions happening (and more likely coming), we'll see an increase in the outsourcing of jobs. At present, many companies still retain large localization teams in house. Many of those positions and the work might be outsourced to save money.

We already saw a surge in people entering the localization market through self-employment during the pandemic and we expect the surge to increase. As a result, businesses will tap into a broader book of diverse talent globally, including people who possess more breadth and depth of language expertise from different countries, domain expertise, and knowledge of local cultures. This will make globalization more effective in the long run. For more insight into this, read Alba Guix's essay in this report, "The Human Factor."

How Businesses Can Operate More Efficiently

Operating in a downturn means applying localization to be more efficient and cost effective. Here are some ideas for businesses to consider:



Diversify the talent pool. Becoming more relevant to local markets requires businesses to rely on a

more diverse team of localization experts who possess knowledge of cultures and communication styles in countries where a business operates. This approach can be done most efficiently by complementing human expertise with a technology platform used to manage projects and assets. For example, freelancers can easily onboard directly and find tasks in their related areas. An outside partner with a ready-made team of localization specialists and technology platform can help.



Enhance business-intelligent technologies for localization decisions. Which features, pages,

videos, or documents should be localized into which languages? Businesses can and should use business intelligence and user research to localize the high-traffic, top-priority content and locally relevant content.



Localization should start with the content creation stage. When creating new documents or software resource

files, businesses should try to re-use existing content/strings, reduce the number of documents, identify and remove the "local market relevant only" content from the localization list, use localizable file formats, and create comprehensive style guides and a terminology list to not only increase the linguistic quality, but also reduce costs and turnaround time.



Adopting automation for file management, translation validation, project management, and cost

monitoring will significantly reduce the cost of localization production.



Machine translation will play a bigger role. During recent years, machine translation technologies

have dramatically improved, becoming a great solution to help reduce localization cost, while providing fast translation coverage. Adopting machine translation technologies requires engineering setup, post-editing, linguistic evaluation, engine training, testing, and code integration. But once these elements are in place, their value can be extracted immediately and in some cases, indefinitely.

Conclusion

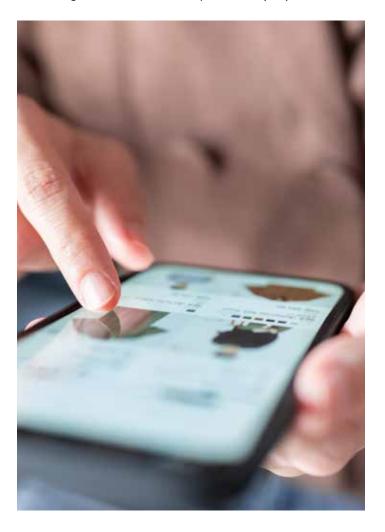
The 2023 economic recession will have a big impact on the localization market. But it will also bring more opportunities for businesses. By diversifying the organizational talent pool and adopting technology wisely, businesses will best position themselves to succeed globally.

Quality and the Customer Experience



Providing a more personalized, high-quality customer experience (CX) is the new mandate for localization and for global businesses.

During recessionary times especially, satisfying existing customers with a better experience is more cost-effective than acquiring new ones, which is urging businesses to put a higher priority on delivering better CX. As a result, businesses are connecting localization to broader CX requirements, including the online user experience (UX).

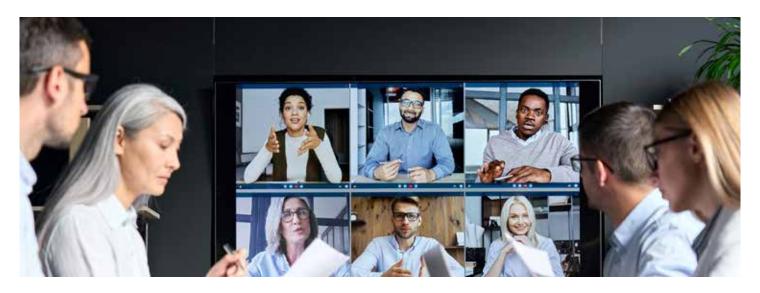


Personalization is essential to a better CX/UX. According to Nimdzi Insights, 60 percent of users are likely to buy a personalized product recommendation they see on an online store. All of this means that the localization professional needs to support global businesses by delivering a more personal experience that results in higher levels of satisfaction from one country to the next.

This shift has a profound impact on how businesses approach localization of content and experiences. For example, it used to be that businesses relied on a single, language-specific style guide as the standard for localization. Businesses used this style guide for localization instructions, and any large localization services provider would need to know that style guide by heart.

This top-down style guide ensured localization was standardized and the basics of communication, such as grammar and syntax, were consistent; but, businesses often created content that was awkward and disconnected from how people really communicate. As a result, localization efforts might have been technically accurate, but they did not contribute to a better experience.

As times changed, brands have taken a bigger look at the totality of the UX, from language to experience, only to realize the need to provide higher-quality content that responds to what people want based on their experience. All this has brought us to a new era – one that is laser-focused on delivering human-centric, intelligent experiences.



Language effectiveness (e.g., translation quality) across markets is as important as ever. But quality means satisfying users, and this goes beyond language. For example, localization professionals need to understand language in context of the entire UX. A description of a table accompanied by an image of someone putting their feet on a table might be factually accurate and complement the text well, but the photo might be offensive to cultures such as Japan, where this is considered disrespectful. In contrast, the same image might be perceived as expressing relaxation in France.

This means that localization teams need to operate in a more cohesive, integrated fashion, instead of working in silos. Where quality was once a key step in the production cycle, it's now become a mindset and design principle shared across teams, where each team is deeply involved in the quality of the localized end product experience.

How this looks in practice:

Content creation teams liaise with localization teams by preparing content that can be easily adapted and customized for each market to avoid errors and rework down the line. The central team needs to have oversight into either hiring or outsourcing local talent. But from there, the central team needs to be willing to defer more to the local teams on matters of style, content creation, and overall experience rather than mandate a top-down approach.

The central team still needs to manage the overall quality of the experience. For instance, a central team needs to oversee formal ways of measuring customer satisfaction, such as surveys and focus groups, so that there is an agreed—upon way to collect feedback across multiple markets. The central team needs to work with local teams to manage the actual process. At Centific, we have found that user surveys and focus groups are the most useful methods of improving what is important. We work with our UX team to include the multilingual customer experience in research and share this information with our translation team, thus creating circular communication.)

Briefings have become key between local customers and localization teams to ensure that experts on the ground remain in sync with customers' needs. Training and certifications are also crucial to training linguists and getting translations right the first time.

Automated checks and customized solutions are adopted to avoid recurring errors or unacceptable behaviors. This is where artificial intelligence (AI) can play an essential role, so long as a diverse team of humans are in the loop to guard against bias creeping into AI.

Localization experts need constant upskilling because language and customs are dynamic. For instance, emoji and stickers are constantly falling in and out of favor from one country to the next. It's essential that localization experts understand these nuances to deliver a great experience.

Localization needs to be measured against quality more than accuracy of content. Quality scores help the organization get visibility into the quality of translated content with no need to understand the target language.

To ensure that work is performed with consistently high standards of quality, integrated teams need a central technology platform to manage everything from workflow to defining, reporting, and tracking the success of global experiences. A single platform ideally should collect and analyze end-user feedback, such as customer ratings and reviews (which Alba Guix discusses in this report), in order to give the localization teams a constant feedback loop. Teams also need to be supported by proper tools, such as social listening, in order to monitor customer feedback in real time.

Bottom line: Localization is no longer just translating software but providing a great experience that is personalized to the needs of customers in multiple markets. As a result, localization means teams need to act in a more coordinated fashion, applying a broader complement of skills and technology.

Localizing Al



Products fueled by artificial intelligence, such as voice assistants, are becoming smarter and more pervasive around the world. At the same time, their proliferation raises concerns about bias. At localization can play a crucial role in making Al-based products more inclusive and relevant to the needs of multiple markets.

Al Localization Defined

Al localization is about localizing Al products, tools, and services to work in their respective markets. Localizing Al means training Al with localized data – in other words, collecting and curating data sets that respond to cultures in different markets. In addition, localization experts increasingly use Al and machine learning engines as essential tools for enhancing end customer experience and driving customer satisfaction and loyalty.

In this context, localization is no longer about just translating files, text, and software for human consumption. Language translation is part of AI localization, but AI localization also includes <u>localized</u> <u>experiences</u> that people love no matter what country they live in – experiences that resonate based on their own cultures.

Ultimately, AI localization helps AI deliver memorable experiences.

As localization specialists make voice assistants, chatbots, computer vision applications, and other Al-based products relevant to different markets, there are some important points to consider:

Pervasive AI Products Create New Challenges for AI Localization

The global market for Al-fueled products is exploding. Chatbot-related products are expected to grow at a compound annual growth rate (CAGR) of 22.8 percent between 2022 and 2028 according to Stratview Research. All in computer vision will achieve a 46.9 percent CAGR from 2021-2027 according to Insight Partners. And these are just two examples.

As AI products become more widespread, localization professionals need to train them to be more responsive to global audiences. For example, chatbots need to handle customer interactions in multiple countries and cities, which requires localization professionals to train chatbots on how to read customer interactions and deduce whether the bot can help them or if they need a human being.

Part of the challenge is training the chatbot to understand when a question is too complicated to address, which isn't an easy task when you're working in multiple languages. For instance, the chatbot needs to

discern local slang and accents to understand what someone is asking.

But localization professionals also need to train the chatbot to understand important issues of context, tone, and intent:

- **Context:** A chatbot in Florida shouldn't recommend snow chains for tires, but a chatbot in Quebec should. A retail chatbot needs to know the difference between, "I need a self-help book" and "I need help."
- Tone and intent: Understanding tone goes hand in hand with intent. Different cultures express themselves differently. A chatbot needs to discern when a customer is truly becoming upset versus being direct, or whether a customer is calling because they need urgent help from customer service.



Knowing how to translate content for multiple languages is a necessary skill, but it isn't necessary for a localization expert to be effective as AI-based products evolve in local markets.

The same holds true for any Al-based product such as synthetic voice, smart speakers, and voice search. The hit movie *Us*, directed by Jordan Peele, illustrates the challenge.

A victim of a crime cries out to her voice assistant for the police. In a moment of satiric commentary about our dependence on technology, the voice assistant begins playing a famous rap song about the police. The assistant responded based on the data it had been given. But it obviously failed to understand context and tone.

Similarly, computer vision applications need to understand context. Computer vision is making great strides in helping stores safeguard themselves against theft. It's also helping large, public spaces such as airports manage crowd control and security. But computer vision requires effective data annotation to understand how to evaluate a scenario.

For instance, let's say an airport wants to train a computer vision model to spot a knife hidden in carry-on baggage. The model needs to know what a knife looks like. And this means all the knives in the world, ranging from a carpenter's knife to a balisong. It also needs to know how to distinguish between a knife and other objects – like the difference between a carabiner and fold-out knife for example. It's easy to see the challenge for localization here: training the application to discern context in airports ranging from Heathrow in the UK to France's Charles de Gaulle Airport.

Bias

Al localization is at the center of an ongoing conversation about the bias problem with Al. Businesses continue to struggle with Al-based products that are fraught with bias, as these examples illustrate. Amazon even recently abandoned an Al-based recruitment software because it was biased against women. As it turns out, the data on which the Al algorithm was based favored male candidates. In other news, a Google Photos labeling feature was found to be biased against darker skin tones.

Al bias happens because people bring their inherent biases into training Al to do its job. For example, Amazon's recruitment software was designed to rank job seekers on a scale of one to five stars. It was developed with the input of 10 years' worth of resumes, most of which came from men. As Reuters reported, "In effect, Amazon's system taught itself that male candidates were preferable. It penalized resumes that included the word 'women's,' as in 'women's chess club captain.' And it downgraded graduates of two all-women's colleges, according to people familiar with the matter. They did not specify the names of the schools."

These issues can creep into AI localization, too. For instance, machine translation technology can produce results that reveal gender bias. Gender bias can happen when you are translating an expression that is gender-neutral in the source language but needs to be gender-specific in the target language, such as English doctor to German Arzt (male doctor) or Ärztin (female doctor).

If the machine is translating a sentence containing such a word from English into German, how does a machine know which gender to use? Sometimes the answer is easy. The sentence, "She is your new physician" will be translated using Ärztin.



But how about "I am your new physician"? A machine will pick Arzt or Ärztin based on whichever translation is statistically more likely and on what they have seen more often in their training data. As a result, a physician is more likely to be identified as male, reflecting bias.

Now imagine that simple translation bias being repeated many times in chatbots, smart speakers, and so on. The magnitude of the problem and its potential impact on business is significant.

We believe that a Mindful AI approach is key to fighting bias of all kinds in AI, and this includes AI localization.

We define Mindful AI as follows: developing lovable AI-based products that put the needs of people first. This is done by being inclusive, as free of bias as possible, and building trust. Mindful AI won't happen without people – especially a diverse team of people – being involved in the creation of AI-based solutions. This approach is known as keeping humans in the loop.

Mindful AI has many moving parts, but one of its most important components as far as localization is concerned is keeping humans in the loop. Human-in-the-loop AI combines the strengths of people (e.g., creativity, insights from ambient information, historical and cultural context) with the strengths of machines (e.g., accuracy, speed, and the ability to manage repetitive tasks that people don't want to manage).

Ultimately, human-in-the-loop AI means relying on a globally diverse set of people whose mere involvement in training AI applications instills a more inclusive approach. At Centific, we rely on globally crowdsourced resources with inmarket subject matter expertise, proficiency in 200+ languages, and insight into local forms of expressions such as emoji on different social apps.

Humans also need the help of technology to scale their work. For instance, our crowdsourced team uses our OneForma platform to teach AI models how to make accurate decisions. LoopTalk, our voice AI data generation capability, enables our team to train voice recognition models to better understand regional accents and non-typical

pronunciations of certain words in a target market.

Doing so helps our clients make AI more inclusive. Mindful AI also needs a process and tools for designing a solution with people at the center. You can read more about that here.

Mindful AI and Localization in Action

Our expertise with AI localization enables our clients to make their AI applications more inclusive and personalized, respecting critical nuances in local language and user experiences that can make or break the credibility of an AI solution from one country to the next.

We design applications for personalized and localized contexts, including languages, dialects, and accents in voice-based applications. That way, an app brings the same level of voice experience sophistication to every language, from English to under-represented languages. The last mile in making AI pervasive and trustworthy is localizing and personalizing content and experiences. OneForma enables that for our clients, thereby transforming the industry while helping AI applications become more inclusive and equitable.

Conclusion

While more pervasive Al-based products will improve how people live and work around the world, they also are fraught with challenges. Al localization both compounds those challenges and offers a solution, depending on how well a business sources and trains a diverse localization team to expand its skill set beyond language translation.

How Al Localization Can Help Global Brands Scale



Many businesses think of localization as a tool that helps them reach new markets by making content more relevant to their customers' cultures and ways of communicating. And this is certainly true. What's intriguing, though, is how localization, with the help of artificial intelligence, achieves this outcome.

Consider the enormous challenge of being relevant to cultures at a time when there is an explosion of social media content from one country to the next. The persistent and rapid creation of user-generated content requires businesses to be equally nimble, if not more so, with their own content – meaning they need to practice "instant localization." Turnaround times must be quicker as content is originally created in the source language. Publication of content in multiple markets and languages must be practically instant.

Infusing AI as part of the localization process can accelerate publication times globally, while optimizing operations such as task allocation, quality management, and even publication itself. Let's take a closer look.

Where AI Fits Best in the Localization Workflow

In the era of instant localization, Al models have a multitude of uses depending on which step the localization process they are leveraged in.

Neural Machine Translation

Neural machine translation (NMT) can be a strong ally when a brand needs to publish content in multiple languages fast. Using publicly available models provided by Google, Amazon Web Services, or Microsoft can be tempting, but these often require a bit of post-editing before final publication. Infusing NMT into the final process helps accelerate publication times. But there are a few points to consider:

- **Translator-in-the-loop:** A translator must always review the content before publication to ensure it respects the style and tone of the content and brand it is representing.
- Model training: The most common NMT models allow for fine tuning which means customers
 can upload their own translation corpuses to ensure the AI model learns the style and terminology
 of the content and brand directly from the translators. This leads to shorter post-editing times as
 more content is translated.
- For content, not for Al training: Machine translation (MT) is an ally for content publication, but it's not a useful tool to enhance or further train your own NMT model. Why? Al isn't perfect, so anything provided by an Al model is just a "guess" based on a backend algorithm fueled by another

Al's training data. This means that using an NMT model to train another NMT model will lead to potential bias and source model issues that can transfer to the target model, creating a model that underperforms.

• **Great tool against bias:** Where MT cannot be used to train other MT models, commercial neural machine translation engines can be embedded for Al training, but not as helpers for the translation of content. Rather, they are more applicable as tools to verify that the translator is not using MT to translate the content themselves. Using MT engines in conjunction with algorithms, such as the Levenshtein Distance, can help estimate which translators might be using Commercial MTs. This ensures translators are not being biased by using NMT to complete a translation task, which helps ensure consistency and bias-free training data for NMT engines.



Task Allocation

When it comes to selecting the right translator for the job, ML can use learnings from past performance data to determine who is the best translator or has the best allocation or response time based on previous translation handoffs in the same day of the week and time of day. This can lead to improved quality and turnaround times for translation. But that data must be part of the localization management process to start with, which means data centralization from a translation perspective, as well as from a handoff and task management perspective.

Quality Assurance by Exception

Once a translation task is performed, machine learning can be used to study the performance of your pool of translators in real time. Applying ML can help determine which translators might be performing "differently" compared to the rest of the pool of translators. For example, machine learning can help identify which translators are translating certain sources too quickly compared to the rest of the translation pool. It can also help you spot reviewers that tend to use certain error categories or severities in the review process more than others.

There are several tools on the market that can help create large indexes of your translation data, including ElasticSearch, which provides some basic machine learning capabilities out of the box, but also requires a consistent, centralized data source across the entire localization management workflow.

Al as the Ally

Al can be a strong ally in the localization workflow, from translation and review to final publication. But keep this in mind:

- A translator-in-the-loop becomes essential to ensuring content fits the tone and style of the brand.
- A translator-in-the-loop approach helps ensure the content feels "local".

Data centralization and the "platformization" of the localization management process are critical to success and the best way to leverage machine learning techniques end to end.

The Human Factor



The localization industry centers around people. People looking for localized experiences and people who do the localization. What trends are affecting the relationship between the two?

New Ways of Working

Before the pandemic, remote work was limited to a few professions. The world was not set up for online work. Most companies did not promote remote work as an option; many discouraged the model. The pandemic changed everything. It enabled a new work style that let people work from anywhere. The rise of remote working has created a global workforce that enjoys that enjoyed a more flexible, balanced lifestyle suited to their personal needs. Along with it, the proliferation of remote collaboration tools such as Mural, Teams, and Zoom has made it even easier for people to work and collaborate remotely.

As a result, more people have sought the benefits of remote work, and this includes localization, which relies heavily on work outsourced to independently contracted professionals.

Thus, localization has become a more attractive profession to more people, receiving an infusion of new talent that come from different backgrounds and diverse talents beyond language or translation skills, including unique industry knowledge and domain expertise.

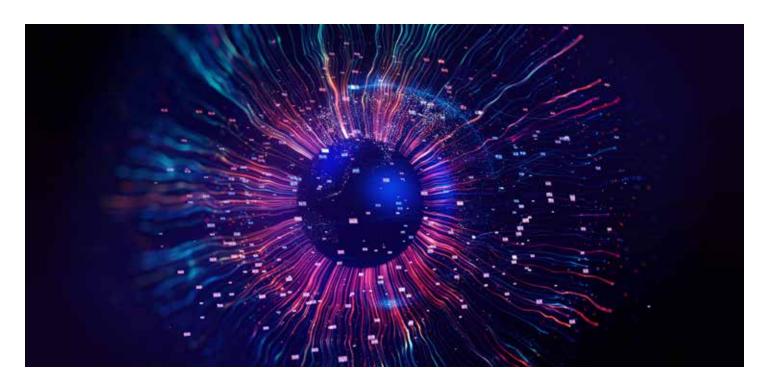
This wider pool of localizers also brings their own knowledge on local languages, cultures, and products

that is relevant to localization. In a world where user experience is key to determining the success or failure of a product, bringing that in-market product experience leads to superior localization.

Take this example of someone using PayPal in Spain for online purchases. As a native Spanish speaker that knows the local market well, they will be very familiar with the content being translated for this market, making them better equipped for localizing similar payment products than other linguists without that knowledge.

Bottom line: talent pools have become more global and diverse.





The Rise of the Feedback Economy

We're all living in a <u>feedback economy</u> in which customers' ratings and reviews can have a profound impact on a company's reputation and its well-being. This is encouraging businesses to figure out better ways to monitor, collect, and learn from that feedback, which includes using Al tools such as natural language processing.

The feedback economy is a global phenomenon affecting global businesses. Its rise dovetails with an increased focus on delivering more personal, higher-quality experiences in local markets, which Giovanna Conte discusses further in this report.

In the digital era, where access to product reviews from other users and personalized campaigns is the norm, users have become more demanding with their experience of those products and services. What's more, users are becoming more vocal about sharing their positive and negative experiences with others.

For products to create a genuinely lovable experience, those experiences need to be relevant

to each person in each country. As many brands have discovered, people will ignore – or even worse, criticize on social media – products that fail to measure up. In this context, localization supports a new sphere of business activity: helping companies achieve stronger levels of customer satisfaction, which manifests in stronger ratings/reviews.

Creating content that is factually correct and grammatically sound is essential, but not sufficient. As Giovanna discusses in this report, localization experts also need to create content that is culturally relevant and more personal to each audience. This requires subject matter expertise and knowledge beyond linguistic skills.

In addition, localization experts themselves need to be evaluated against a broader set of metrics beyond the technical mechanics of creating accurate content. Which begs the following questions: How relevant is their work? And how well does this work support customer satisfaction?

Emerging Conversational Formats

The digital era continues to usher in different forms of expression and customer interaction between the brand and consumer. Other than those mentioned above, brands and consumers are also interacting everyday behind the firewall, an example being the rise of chatbots.

With chatbots, the relationship between the brand and consumer is immediate. It's decoupled from space and time if a brand uses a chatbot powered by AI that can answer questions 24/7.

Chatbots are becoming more sophisticated and human. For example, startup Tymely is developing a chatbot that enables brands to provide email and chat support services in a more human, empathetic, and precise way. And Soul Machines has developed a 3D digital person currently being used on sites such as Calocurb that responds to your talk or type preferences, and its digital person even smiles back at you if you decide to use your camera during a session. And, DeepMind has developed Sparrow, which answers more complex questions using AI.

As chatbots become smarter and more global, localization experts will play an increasingly important role in making them more relevant to each market they serve. But the localization expert here needs to expand their responsibility beyond language translation. With chatbots, the business needs to read customer intent.

When a business localizes chatbots, it's not just translating English that is important. The localization professional must understand different ways of expression. They, too, must discern intent in order to train the AI model to respond in a suitable way, whether the chatbot is communicating with a customer in Mumbai or New York.



Conclusion

The pandemic and new economy models have increased and diversified the community of translators and localizers worldwide, enabling businesses like Centific to benefit from a larger, more global workforce with other talents and skills that make them more qualified to new localization demands.

About the Authors



Sergio Bruccoleri

Sergio Bruccoleri is the Director of Platform and Innovation for the Globalization Services team at Centific, where he leads the R&D, Engineering, and Platform teams behind Centific Al Data & Language Services offering.



Giovanna Conte

Giovanna Conte is the Head of Global Quality Management at Centific, where she leads Quality Managers and Language Specialists teams across different geographies.



Alba Guix

Alba Guix is VP and Head of Europe at Centific, where she also leads the Global Shared Services organization managing Resources, Quality, and Learning.



Jonas Ryberg

Jonas Ryberg is the Chief Globalization Officer at Centific, where he manages Language and Al Data services.



Vincent Swan

Vincent Swan is VP of Technical Solutions at Centific, where he manages the teams delivering innovative technical solutions & support ecosystems for AI & Globalization Services.



Wei Zhang

Wei Zhang is an AVP of Localization Technology at Centific, where he focuses on adopting new localization technologies for global customers.

About Centific

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