ELIS 2021 - EUROPEAN LANGUAGE INDUSTRY SURVEY
EUATC IN COLLABORATION WITH ELIA | EMT | FIT EUROPE | GALA | LIND | WOMEN IN LOCALIZATION

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Initiated in 2013 by EUATC, the European federation of national associations of translation companies. It is co-organised with ELIA, FIT Europe, GALA, the EMT university network, the European Commission’s LIND group, and - since this year - Women in Localization.

Open to Language service companies, independent language professionals, training and language technology providers, language service buyers, private and public translation departments.

The survey covers market trends, expectations & concerns, challenges and obstacles, as well as changes in business practices.

907 responses
- 172 language service companies
- 575 independent language professionals
- 105 representatives of training institutions
- 44 language departments and language service buyers
- 11 language technology providers

The distribution per country will be published in the complete ELIS slide set.
What will we cover?

- Structure of the industry
- Market evolution & industry mood
- Language service companies
- Operational practices
- Covid measures
- Language departments & buyers
- Independent language providers
- Education
- Technology
- Trends
- How can we help?
- Conclusions & afterthoughts
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<th>Companies</th>
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Industry structure

Evolution of size distribution confirms industry growth reported by other surveys, but 51% is still below 1M€. Popular 1M - 5M € size segment is male dominated.

Independent professionals - qualifications
79% translation/interpreting degree
17% language degree
20% degree in another field (e.g. law, business, accounting) (9% in combination with a language or translation/interpreting degree)
13% of LSC respondents are member of an industry association but not of their national association of translation companies.

Close to 20% of the respondents - in all segments - are not following industry news on a regular basis.
Popular 1M - 5M € size segment is clearly the most well connected segment, both in terms of memberships and in industry participation.
2020 - 2021 MARKET EVOLUTION

Percentages do not show actual increase or decrease but the difference between respondents reporting an increase and those reporting a decrease, as a measure of the market sentiment.
Expectations for global market activity remain positive despite 2020 disruption.

Note: This is confirmed by external sources such as the Slator Language Industry Job Index™.
Activity loss in 2020 hit independent professionals and LSC equally hard, but LSCs have considerably more confidence in 2021 growth (net 71% of LSC expect a rebound).

LSC report a stronger price drop in 2020 than independent professionals or language departments / buyers. For 2021, all segments expect a status quo or a slight erosion.
Both language departments and training institutes are concerned about further budget restrictions and growing workload.

Training institutes expect the interaction with translation companies to continue to grow considerably.

Data security continues to be high on the agenda.
Industry mood

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|       |             |               | 0.5   | 0.9   | 1.0   | 0.6   |

Sentiment = (Investment score - disinvestment score) / Number of companies.

Score 0 = as many investment as disinvestment intentions

Green: Sentiment > 0.5
Yellow: Sentiment between 0 and 0.5
Red: Sentiment < 0
Grey: Below response threshold

Significant number of countries below threshold (results less reliable)

Global industry mood deteriorated compared to previous years
Industry mood vs LSC size

Sentiment = (Investment score - disinvestment score) / Number of companies.

Mood score is strongly correlated to company size.
How was Q1 2021?

62 answers, mostly from LSCs. Overwhelmingly positive, in line with optimistic LSC expectations. Only a few answers from language technology providers, but all of them positive. Independent professionals give a more neutral image, but not enough answers to draw reliable conclusions.
Focus on LSC results
Not so Bad after all?

Revenue

Profitability

52% decline ELIS vs 55% growth Nimdzi™ linked to different respondent mix? 47% increased profitability, 32% saw a decline (in line with increase reported by CSA™).
A sweet spot?

The ‘popular’ 1M-5M€ size range showed modest growth and a clear increase in profitability in 2020, as well as the highest growth expectations for 2021. Differentiators for this size segment are:

- Stronger than average post-editing and audiovisual activities (approx. +17%) and less involved in language training (approx. 20% less than average).
- Higher than average position in healthcare (+14%) and computer software (+9%).
- No apparent link with major developments could be found.

Difference between overall 2020 sales decline in ELIS (52% of respondents) and modest 2020 growth shown in Nimdzi™ research (55% of participants) is potentially linked to the resilience of larger size segments, which are underrepresented in the ELIS results.
Overall, the 1 M - 5 M € size segment is reporting the highest level of staff increases.

As expected, companies of all sizes are - or intend to - beef up their sales and marketing staff.

Less expected is the strong score of language-type staff profiles.

Technical profiles are mainly popular within the 1 M - 5 M € segment, which is in line with their focus on technology changes. Smaller companies are lagging behind in this area.

All size segments agree that this is not the moment to increase administrative support functions.

Project managers remain a popular target in the smaller segments, but are not a priority for companies larger than 5 M €.

Despite strong news coverage of multimedia focused service providers, reported interest in additional multimedia talent is modest.
Staff composition changes vs size - details

Engineering & development staff

Finance, HR & Legal staff
Staff composition changes vs size - details

**Language staff**
- Start
- Considerably increase
- Increase
- No change
- Decrease
- Considerably decrease
- Stop

**Management staff**
- Start
- Considerably increase
- Increase
- No change
- Decrease
- Considerably decrease
- Stop
Staff composition changes vs size - details

**Multimedia staff**

- **< 1 M€**
  - Start: 75
  - Considerably increase: 50
  - Increase: 25
  - No change: 0
  - Decrease: -25
  - Considerably decrease: -50
  - Stop: -75

- **1 M - 5 M€**
  - Start: 50
  - Considerably increase: 25
  - Increase: 0
  - No change: 25
  - Decrease: -25
  - Considerably decrease: -50
  - Stop: -75

- **> 5 M€**
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  - Considerably increase: 0
  - Increase: -25
  - No change: -25
  - Decrease: -50
  - Considerably decrease: -75
  - Stop: -75

**Project Management staff**

- **< 1 M€**
  - Start: 25
  - Considerably increase: 0
  - Increase: -25
  - No change: -25
  - Decrease: -50
  - Considerably decrease: -75
  - Stop: -75

- **1 M - 5 M€**
  - Start: 0
  - Considerably increase: -25
  - Increase: -50
  - No change: -75
  - Decrease: -75
  - Considerably decrease: -75
  - Stop: -75

- **> 5 M€**
  - Start: -25
  - Considerably increase: -50
  - Increase: -75
  - No change: -75
  - Decrease: -75
  - Considerably decrease: -75
  - Stop: -75
Staff composition changes vs size - details

Sales & Marketing staff

Vendor Management staff
LSC plans to increase teams in 2021
There does not seem to be a clear overall link between company size and the implementation of major changes. However, we do see significant differences in the types of changes reported by the different size segments.

Staff Reduction is surprisingly selected most often by companies smaller than 1 M €.

Companies in the 1 M - 5 M € ‘sweet spot’ segment show the highest level in technology changes, process changes and staff increases.

Companies larger than 5 M € report the highest level in management changes and M&A type changes, but also in service offering changes.
Major developments - LSC

No clear relationship between main developments, size segment, sales or profitability evolution.

Acquisitions were only reported by respondents with a turnover of more than 25M €.
Average 50% “no change”, even for post-editing. Widely expected increase in language data services not (yet) visible in these survey results, possibly linked to (small) average size of respondents.
Not surprisingly, human translation is the main activity by a long shot. Post-editing is second, and the fastest growing service line, but still far behind.

Average 50% “no change”, even for post-editing.

Widely expected increase in language data services not (yet) visible in these survey results, possibly linked to (small) average size of respondents.

On site interpreting is replaced by remote interpreting.
Sector ranking

Ranking based on LSC + Freelance average. Analysis based on percentage of business, with scale 0 to 7. Patents was integrated with Legal in the freelance survey. No change question in the freelance survey.

LSC respondents flag Healthcare, Legal, Software and Entertainment as main potential growth areas. Travel, fashion and culture are considered as weak.

Results show strong domain diversification, both among LSCs and independent professionals.
Sectors Rising and Falling

One clear winner - healthcare - and one clear loser - tourism. The runners up can be considered as ‘safe havens’. LSC respondents intend to further develop subcontracting as a source of business.
OPERATIONAL PRACTICES
Operational changes

1M - 5M € ‘sweet spot’ size segment scores significantly higher on MTPE and process automation.

The Increase & Start categories for Remote Interpreting cover all independent professionals who work as interpreters (approx. 30% of all respondents in that segment).
Operational changes LSC vs size

1M - 5M € ‘sweet spot’ size segment scores significantly higher on MTPE and process automation.
**LSC certification status**

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<th>LSC certification status</th>
<th>Percentage</th>
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<td>ISO 17100 - Translation services</td>
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<td>ISO 9001 - Quality process</td>
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<td>ISO 18841 - Interpreting services</td>
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<td>ISO 13485 - Medical devices</td>
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</tr>
<tr>
<td>ISO 13661 - Community interpreting</td>
<td>2%</td>
</tr>
<tr>
<td>ISO 20228 - Legal interpreting</td>
<td>2%</td>
</tr>
<tr>
<td>ISO 21998 - Medical interpreting</td>
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</tr>
</tbody>
</table>

Strong relationship with LSC size, with maximum certification rate in 1M-5M€ resp. 10-50 staff segment.

Activity-specific certification schemes slowly making progress.
Subcontracting, whereby a language service provider (LSC or independent professional) is contracted by another language service provider instead of a direct client, has always been an essential part of the language industry.

LSCs and independent professionals clearly make a deliberate choice to work primarily for direct clients or for other language service providers..
LinkedIn and SEO are the most widely used. SEO scores well across the board, while LinkedIn shows mixed results, the same way that blogs do.

Facebook is widely used, but the reported success rate is low.

Content marketing reports positive and well measurable results, and shows the highest growth intentions of all categories.

Twitter is not extensively used as a marketing tool and reported results are low.

50% of respondents indicate that they do not host any events.

Despite its good reputation, video is not widely used and the ROI feedback is not positive.
COVID MEASURES
Covid discounts requested

- 8% of clients requested a discount.
- 5% average discount.
- No clear difference between size segments.

Independent professionals
- 9% of LSCs requested a discount (4% average discount).
- 5% of direct clients requested a discount. (3% overall average discount).

Conclusion: impact of Covid-related discounts was limited
Both LSC and independent professionals intend to continue with these measures. LSC plan a stronger focus on technology. Independent professionals focus more on training, diversification and online networking.
FOCUS ON LANGUAGE DEPARTMENTS
Respondents

Only 36% of respondents handle more than 8 languages. Translation departments typically report to an administrative function. Buyer/language department respondents give themselves only a 2.3 out of 5 score in terms of level of decision making influence.
Only 36% of responding language departments handle more than 8 languages. 54% of responding units have less than 5 staff members. Outsourcing focuses on execution activities such as translation, interpreting, subtitling and dubbing.
Reported post-editing in outsourced translation is much lower than LSC indications, possibly linked to small average size of responding units.
Outsourcing in language departments

Majority do not expect big changes in outsourcing practices.

(Too) high number of “Don’t know” regarding budget and buy rates.
What clients want

Scores based on average of 0 to 5 scale.
Not surprisingly, quality of deliverables, reliability and flexibility are top requirements for language service buyers.
This is correctly understood by the language service providers, both the companies and the individual professionals.
Other buyer priorities, such as partnership attitude, ease of doing business and scalability however seem to be underestimated by the providers (even by the larger translation companies).
Not surprisingly in an online industry, proximity is low on the priority list.
Challenges - language departments

Language departments are concerned about how to maintain quality and control while juggling shrinking budgets, new technology requirements and increasing workload.

The answers strongly reflect the internal roles of the respondents.
FOCUS ON INDEPENDENT PROFESSIONALS
Working with LSCs

Independent professionals - subcontracting experience

Subcontracting experience 2021 - Importance and Satisfaction
Increase in rush deliveries requested in 2021. Possibly associated with COVID-19 and urgent need for information. General picture though is that rush deliveries are a regular feature of the translation sector. This is a key stress factor for independent professionals. More training for LSCs in managing the flow of texts for translation needed.

Clear consistent pattern that most translation projects are done by individual independent professionals rather than being split across teams of translators.
Clear differences in responses from 2020 and 2021 on how often translators are provided with reference materials. Not clear if it is a worsening in the situation or an effect of the different cohort of respondents. Needs to be monitored in next survey.

Interestingly, those who do receive reference materials for their projects are generally positive about the utility of those materials. Still considerable scope for LSCs to push the curve further to the right.
Working with LSCs

Consistent picture of independent professionals **not** regularly submitting queries to PMs. We interpret this as indicating the respondents’ level of professional experience and familiarity with client content and the subject matter. This is very much in keeping with expectations, given the expertise and professionalism indicated by respondents.

Usefulness of the responses given by PMs to queries improved in 2021 compared to 2020. Again considerable scope for LSCs to shift the curve further to the right.
Improved picture in 2021 in terms of how much independent professionals perceive their work is being proofread and/or edited.

Independent professionals consistently feel their work is not being edited by native speakers of their own language - clearly considerable room for improvement on LSC side in this sector.

Also considerable scope for improvement in use of subject-matter experts as editors/proofreaders.

Working with LSCs
Continuing Professional Development (CPD)

Three fifths of independent professionals report return on investment from CPD as expected.

Top area for CPD: Technology. Followed by: subject matter specialisation, soft skills (time management, communication, etc.) sales and marketing, localisation and business management. Picture remarkably similar to 2020. Unsurprisingly, RSI also featured prominently in 2021.
Overall there is strong reliance on what the state can provide if things go wrong (accident, illness) though the picture varies considerably from country to country. Private insurance for such eventualities is the preserve of the few rather than the many. Most common reason for not having insurance is unstable income (consistent with findings in 2020) - ties into stress factors and work/life balance

Planning for future not on the radar for younger respondents - scope for translator/associations to raise awareness

Precarity because of unstable income faced by many in the profession identified in 2020, also seen in 2021
Stress factors

The hierarchy among stress factors, and even the individual concerns themselves, have not significantly changed. Contrary to expectations, stress levels have even somewhat lessened, with the exception of the concerns regarding the economic climate and to a minor degree the rise of MT.

Other stress factors mentioned were:
- Trying to juggle family / working from home / home schooling
- Lack of regulation in the profession
- Feast or famine nature of the work
- Uncertain future is making clients nervous
- Lack of feedback

This picture is generally consistent with FIT Europe’s COVID-related surveys.
Respondents report that work / life balance slightly deteriorated compared to 2020 results. This could be due to the impact of COVID.

Reasons for lack of work / life balance:
- Heavy workload
- Feast or famine nature of the job
- Changing/urgent deadlines
- Low rates
- Long hours/weekend/evening work
- Care duties/working from home

Reasons for good work / life balance:
- Good time management
- No weekend/evening work
- Flexibility of freelance working
- Learning to say no to unrealistic deadlines/assignments
FOCUS ON EDUCATION
Training institutes

Higher percentage of EMT Master programs is not surprising, since EMT is a survey partner.

10% of respondents (half of them students) report a Bachelor program without mentioning a Master.
Skill evolution (LSC) scored from -2 (strong decrease) to +2 (strong increase)

Skill level (language departments and training institutes) scored from 0 (inexistant) to 3 (strong)

Information gathering & processing has considerably improved (confirmed by improved absolute scores).

LSCs report a - small - deterioration of the already weak knowledge of market expectations. Both language departments and training institutes give this skill also their lowest score.
Education vs language industry

Preparation to professional world

- Guest lectures: 76%
- Internship: 75%
- Course(s) on professional aspects: 70%
- Workshops: 61%
- Simulated translation assignments (no real customers): 54%
- International internship: 28%
- Simulated translation company - commercial assignments (real customers): 23%

EMT awareness

- LSC: 49.42%
- Buyer / Lang dept: 52.27%

- Yes, but we do not know which institutes have this label: 10.47%
- Yes, but we do not take it into account in our recruitment process: 30.23%
- Yes, we take it into account in our recruitment process: 8.72%
- Yes, it is a condition for specific job profiles: 1.16%
Network of Master programmes in translation to improve the quality of training and to help young graduates to integrate smoothly in the translation job market.

Currently 83 institutes from 25 EU and partner countries that meet the EMT criteria. Next call for membership in 2024.

Following Brexit and UK’s withdrawal from Erasmus+, the UK-based institutes are no longer part of the EMT network 2019-2024.
Education vs industry

Interesting findings

Most successful candidates for an inhouse language function had a Master in Language, not a specific Master in Translation or Interpreting.

For copywriters, respondents preferred a Bachelor degree in a non-language specialisation (possibly communication or an industry-specific area).

For post-editors, respondents do not necessarily require a Master degree, contrary to terminologists and freelance translators and interpreters.
Challenges - training institutes

Translation institutes suffer the same budget and time restrictions as language departments and feel the same pressure from new technology requirements. The expectations of potential employers in the industry creates an additional challenge that is specific for this segment.
11 tech companies took part, among them four TMS like Memsource, Wordbee, XTRF, two interpreting tech, two language data tech, one media localization and a few others. All companies were above 10 people, and 7/11 have been on the market more than 10 years.

- 10/11 planned investing in 2021. This means jobs. LTC to hire primarily salespeople & engineers, then support.
- 8/11 believe they will grow steadily, up to 50% a year

<table>
<thead>
<tr>
<th>Number of providers</th>
<th>Market activity</th>
<th>Pricing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase</td>
<td>Increase</td>
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<tr>
<td>Increase</td>
<td>Increase</td>
<td>no change</td>
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<td>no change</td>
</tr>
<tr>
<td>Little or no change</td>
<td>Increase</td>
<td>Don't know</td>
</tr>
</tbody>
</table>
### (Un)Surprising findings

<table>
<thead>
<tr>
<th>Focus on corporate language people</th>
<th>Majority of revenue came from corporate language teams and LSPs. Non-language roles in corporations were responsible for a much lower percentage. The drift is towards language teams - half of LTC expect growth there, while two respondents expected a decline in their LSP clientele.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not just software</td>
<td>Licensing was not the only source of revenue, with customization services second.</td>
</tr>
<tr>
<td>From Engineers to Salespeople</td>
<td>Smaller companies consisted mainly from engineers, established companies reported more than half of staff in sales &amp; marketing, and support</td>
</tr>
<tr>
<td>A legion of clients</td>
<td>Tech firms reported serving more clients than an average human-powered LSP. TMS companies reported between 200 and 500, one tech firm in Czechia reported 500 to 1000 clients, and another company said they support more than 1000 clients.</td>
</tr>
</tbody>
</table>
AI looking good only on paper?

What are in your opinion the main selection criteria used by your client base when buying technology or technology services?

LSCs rank features with high AI potential such as quality management, data analysis and workflow higher on their priority list.
Expectations from other segments

LSC - TMS improvement requests

- Integration with CAT/MT systems (60%)
- Quality management (50%)
- Data analysis (40%)
- Reporting (40%)
- Financial management (30%)
- Workflow (30%)
- Resource/vendor management (25%)
- Integration with ERP/CRM (20%)
- Project follow-up (20%)
- Project administration (15%)
- Task allocation (10%)
- Project ordering (5%)

Training institutes - technology improvement requests

- Lower cost of ownership (60%)
- Make tools easier to use (55%)
- Make integration easier (50%)
- Improve client support / training (45%)
- Provide tools in more languages (40%)
- Improve knowledge management (35%)
- Improve MT quality (30%)
- Make tools more intelligent (25%)
- Make tools more robust (20%)
- Increase reuse (15%)
- More support for iOS (10%)
- New, more advanced tools (5%)
Build or buy

Language departments: build or buy

- **Buyer / lang depts**
  - Don't know: 0%
  - 5 = All: 0.98%
  - 4: 0.98%
  - 3: 23.26%
  - 2: 23.25%
  - 1: 20.93%
  - 0 = None: 16.28%

- **Training institutes**
  - Don't know: 17%
  - 5 = All: 32.35%
  - 4: 50.00%
  - 3: 2.33%
  - 2: 13.95%
  - 1: 23.25%
Automation

Language departments
- More than 30% have implemented a procurement portal. 55% do not report any plans to implement it.
- Automation plans are mainly focused on translation management and quality-related tasks.
- Even mix of internal and external technology.

Training institutes:
- Technology investments reflect the trends in the industry, with CAT, MT, remote interpreting and audiovisual tools as main technologies.
- Virtually only third-party tools.

LSC
- Focus on translation/interpreting productivity and process efficiency. Main technologies are already widely implemented. 30% of LSC respondents do not report plans to implement MT.
- Audiovisual technology will be catching up.
Automation plans - language departments

Language department automation is mainly focused on translation management and quality-related tasks.

More than 30% of respondents have already implemented a central procurement portal.

Language departments use an even mix of internal and external technology. Training institutes use primarily third-party tools, consistent with industry use.

<table>
<thead>
<tr>
<th>Language departments - automation plans</th>
<th>Not planned</th>
<th>Planned</th>
<th>Implemented</th>
<th>Implemented, but planned to replace by alternative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Centralized procurement portal</td>
<td>55%</td>
<td>8%</td>
<td>30%</td>
<td>8%</td>
</tr>
<tr>
<td>Interpreting/multilingual meeting technology</td>
<td>83%</td>
<td>6%</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>Machine translation</td>
<td>53%</td>
<td>26%</td>
<td>16%</td>
<td>3%</td>
</tr>
<tr>
<td>Multilingual chatbots</td>
<td>85%</td>
<td>10%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Multilingual content performance metrics</td>
<td>75%</td>
<td>18%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Subtitling/dubbing with speech recognition</td>
<td>85%</td>
<td>5%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Translation management system</td>
<td>41%</td>
<td>10%</td>
<td>41%</td>
<td>8%</td>
</tr>
<tr>
<td>Translation quality evaluation</td>
<td>43%</td>
<td>19%</td>
<td>30%</td>
<td>8%</td>
</tr>
<tr>
<td>Terminology management</td>
<td>24%</td>
<td>18%</td>
<td>45%</td>
<td>13%</td>
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<tr>
<td>Writing assistance</td>
<td>77%</td>
<td>10%</td>
<td>10%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Language departments: build or buy

- **Buyer / lang depts**
  - Don't know: 0%
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  - 5 = All: 0.08%
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  - 3: 50.00%
  - 2: 0.00%
  - 1: 0.00%
  - 0 = None: 0.00%
Remote interpreting most popular technology in 2020. 30% of LSC respondents do not report plans to implement MT.

Audiovisual and authoring are technologies to watch out for.

Training institutes are heavily into all technologies that aim to increase translation/interpreting efficiency.
No open trend question to LSCs. All segments recognise MT and post-editing by far as the most prominent trend in the industry. Independent professionals frequently link increased competition and price pressure with the influx of unqualified people from other industries hit by the Covid pandemic, less qualified resources used for post-editing, or easier online access to lower cost professionals (e.g. interpreters in a different country). They also mention consolidation in the LSC segment as an additional source of price competition.
Hot topics

- Artificial Intelligence
- Mergers & Acquisitions
- Loss of talent
- Self-service Platforms
- MT quality increase

Candidates for further discussion

Require policy-maker attention: GDPR, competition & labour rules.
In 2020, Artificial Intelligence was marked as one of the upcoming trends in the industry. What does this really mean for you?
M&A surge

What will be the impact of the recent surge in mergers and acquisitions in the language industry?

<table>
<thead>
<tr>
<th>M&amp;A surge</th>
<th>LSC</th>
<th>Training institutes</th>
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<tbody>
<tr>
<td>Buyers renegotiate contracts</td>
<td></td>
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<tr>
<td>Opportunities for competitors</td>
<td></td>
<td></td>
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<tr>
<td>No major impact</td>
<td></td>
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<tr>
<td>M&amp;A attracts buyers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not aware</td>
<td></td>
<td></td>
</tr>
<tr>
<td>M&amp;A turns specialists away</td>
<td></td>
<td></td>
</tr>
<tr>
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<tr>
<td>M&amp;A turns buyers away</td>
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</tbody>
</table>

M&A opinions vs LSC size

- LSC: Light Scoping Contracts
- Training institutes

- < 1M €
- 1M € - 5M €
- > 5M €
Brain drain

In previous years, survey respondents expressed the fear that many professionals will leave the industry as a result of declining revenues, increasing expectations and lack of recognition. What is the solution?
Various players - both large and middle-size - have launched or re-activated self-service platforms that offer a translation service with less or no human intervention. This, and countless local professional directories, adds a new dimension to the already existing market places such as Proz, Translatorscafe etc. What will be the impact of these developments?
Many expect increases in machine translation quality to disrupt the professional translation landscape. How do you expect your organisation will react to that in the 5 years to come?
HOW CAN WE HELP ?
Public support

DG Translation - Outreach projects

https://ec.europa.eu/info/departments/translation_en
FINAL WORDS
Five conclusions and afterthoughts

- 2020 could have been worse and Q1 '21 looks good - but not everyone will agree
- Covid accelerated long needed developments
- Is that sweet spot in the LSC segment real?
- Outsourcing can extend beyond pure execution. Who takes the first step?
- MT dominates the trends, but RSI and AV technologies are getting more attention

All surveys have a limited scope and ELIS is no exception. If you are looking for information about the language industry that was not covered by ELIS, we suggest to:

- Get in touch with the participating survey partners for additional information (URLs on next slide)
- Check out the research work published by specialized research agencies: Slator.com, Nimdzi.com, CSA-research.com
- Contact the ELIS research team at contact@research.euatc.org
<table>
<thead>
<tr>
<th>Website</th>
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<tbody>
<tr>
<td>euatc.org</td>
<td>EUATC (European Union of Association of Translation Companies)</td>
</tr>
<tr>
<td>elia-association.org</td>
<td>Elia (European Language Industry Association)</td>
</tr>
<tr>
<td>gala-global.org</td>
<td>GALA (Globalization And Localization Association)</td>
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<tr>
<td>fit-europe-rc.org</td>
<td>FIT Europe (International Translators Federation Europe)</td>
</tr>
<tr>
<td>ec.europa.eu/info/resources-partners/european-masters-translation-emt_en</td>
<td>EMT (European Master’s in Translation) network</td>
</tr>
<tr>
<td>ec.europa.eu/info/departments/translation_en</td>
<td>European Commission - DG Translation (Lind group)</td>
</tr>
<tr>
<td>womeninlocalization.com</td>
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