



ELIS 2022 – FOLLOW UP SPRING 2022

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- 16:00 Welcome, housekeeping rules
- 16:05 Opening words by Merit-Ene Ilja
DG Translation, European Commission
- 16:15 Presentation of the ELIS 2022 Spring Follow-up results
- 16:35 Discussion panel
- 17:25 Closing words by Heike Leinhäuser, president of EUATC

15th March 2022



ELIS 2022 follow up – why and how



The ELIS 2022 survey closed on 31st January and therefore could not factor in the impact of the Ukraine war and its ramifications in terms of energy prices, inflation and logistic disruption. A small followup survey was set up to evaluate this impact, as well as to validate specific outcomes of the main survey.

The survey was run for one week and gathered 268 responses: 60% from independent language professionals, 25% from language service companies, 10% from academic staff and students, and smaller numbers from language departments and buyers.

Only 6% of the respondents completed it in one of the 17 translation versions.

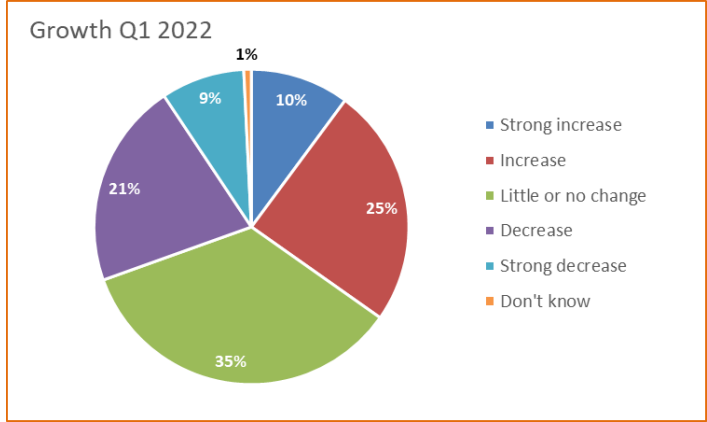
The follow-up had 4 distinct sections

- Check performance in Q1 2022 to validate expectations expressed in ELIS 2022
- Talent recruitment: gather input regarding ways to meet the growing concern about talent recruitment, fueled by warnings from academia about declining student numbers.
- Machine translation usage: validate the actual usage of machine translation (ELIS 2022 results indicated that it is considerably lower than generally assumed).
- Impact of Ukraine war and related events: evaluate how strongly and in which way these events are impacting the language industry, and how the stakeholders are reacting to them.

ELIS 2022 follow-up



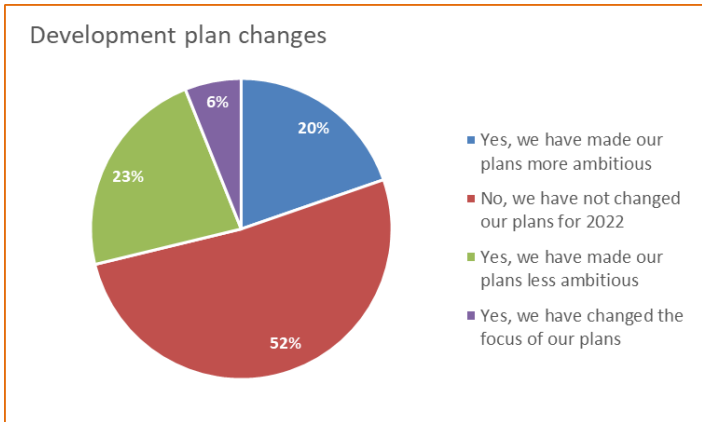
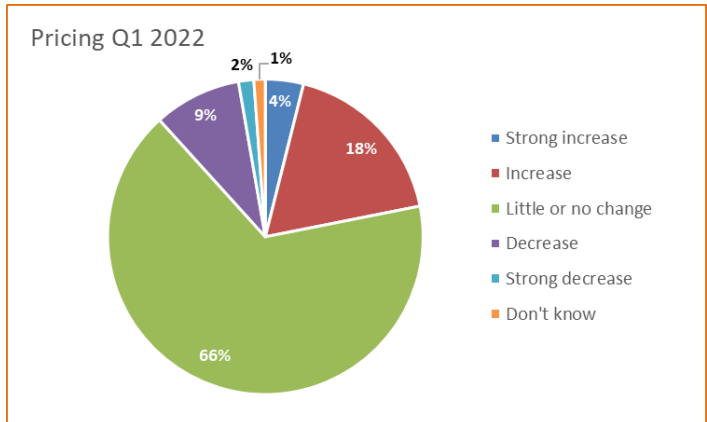
Q1 Performance



ELIS 2022 showed growth expectations ranging from 26% (independent professionals) to 71% (language companies). Q1 follow up only shows a net increase of 5% (35% report an increase, 30% report a decrease).

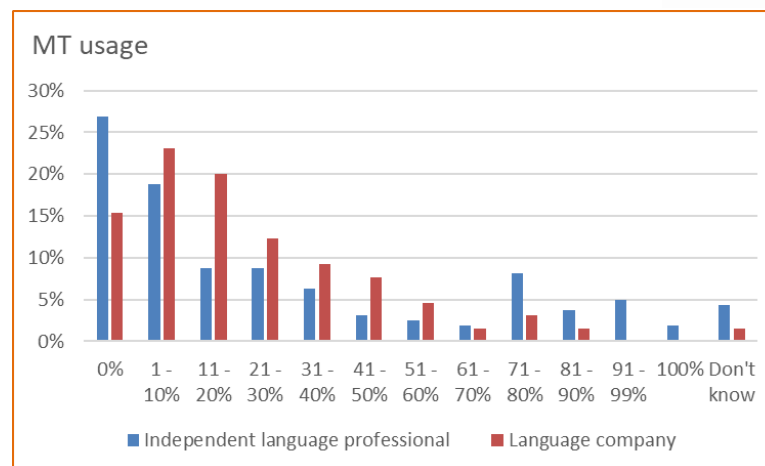
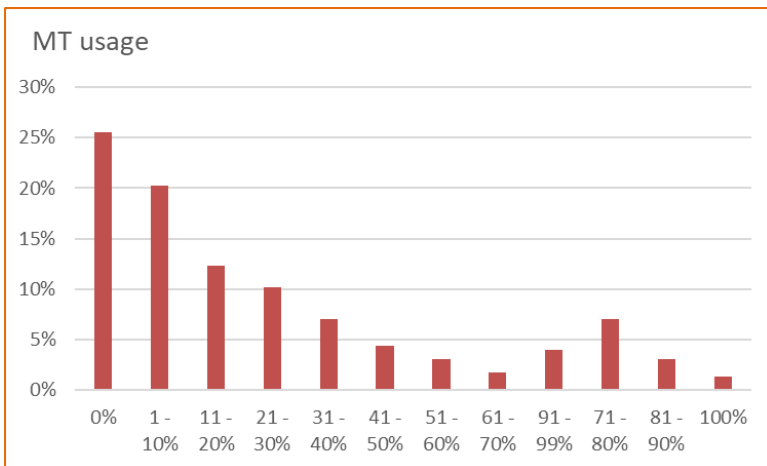
In ELIS 2022 net 10% (individuals) to 30% (companies) expected a price increase. Net 11% do indeed report a real increase (16% of individuals, 9% of language companies). The majority however saw little or no change in pricing in Q1.

About half of the respondents have not changed their development plans. Interestingly, among those who changed their plans, an equal number are making their plans more and less ambitious.



- Make profession more attractive: 51% of independent professionals, 21% (2nd highest score) of LSCs.
 - Rates, salaries, career perspectives
 - Working conditions
 - More flexible access to profession vs regulation
- Adapt training to needs. Many aspects, many parties required
 - Curriculum focus
 - Trainer recruitment
 - In-company training (highest score among LSCs)
 - Internships
 - Continuous training
- Information to students and public. Improved profile of language-related professions.
- Increased and more structured interaction between industry and academia (current events are usually biased, co-operation is unstructured and based on personal relations) – increased role of associations
- Adapt LSC recruitment practices (more long-term approach)

Machine translation usage (ELIS 2022 average: 23%)



Overall average: 25%

Contrary to general assumption, independent professionals report higher MT usage (28%) than language service companies (21%).

More than half of the respondents use MT on less than 20% of their projects.

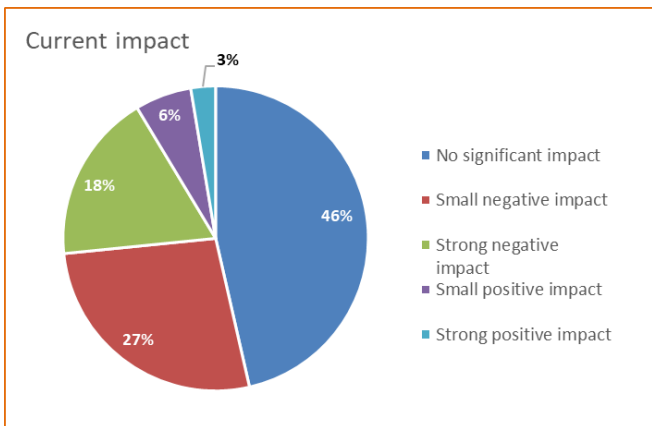
Follow up percentages are slightly higher than ELIS 2022 results, but confirm its conclusion.



Impact of Ukraine war and related disruptive events

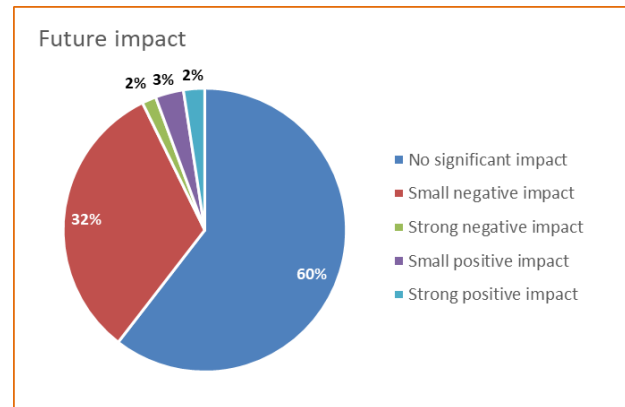
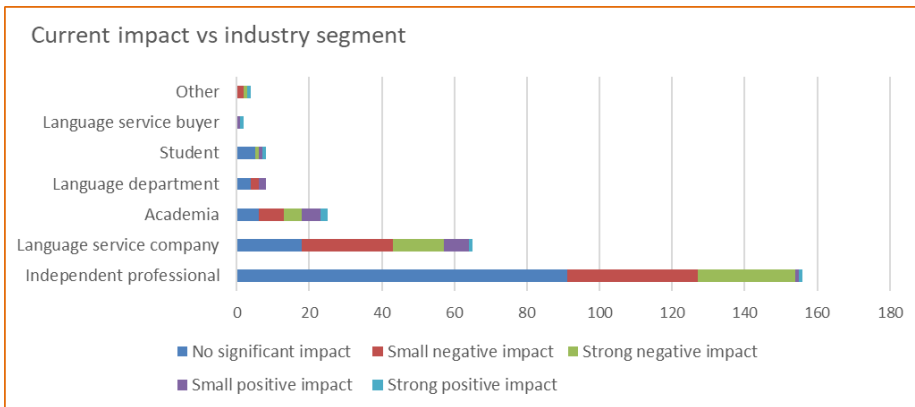


Not all segments are alike

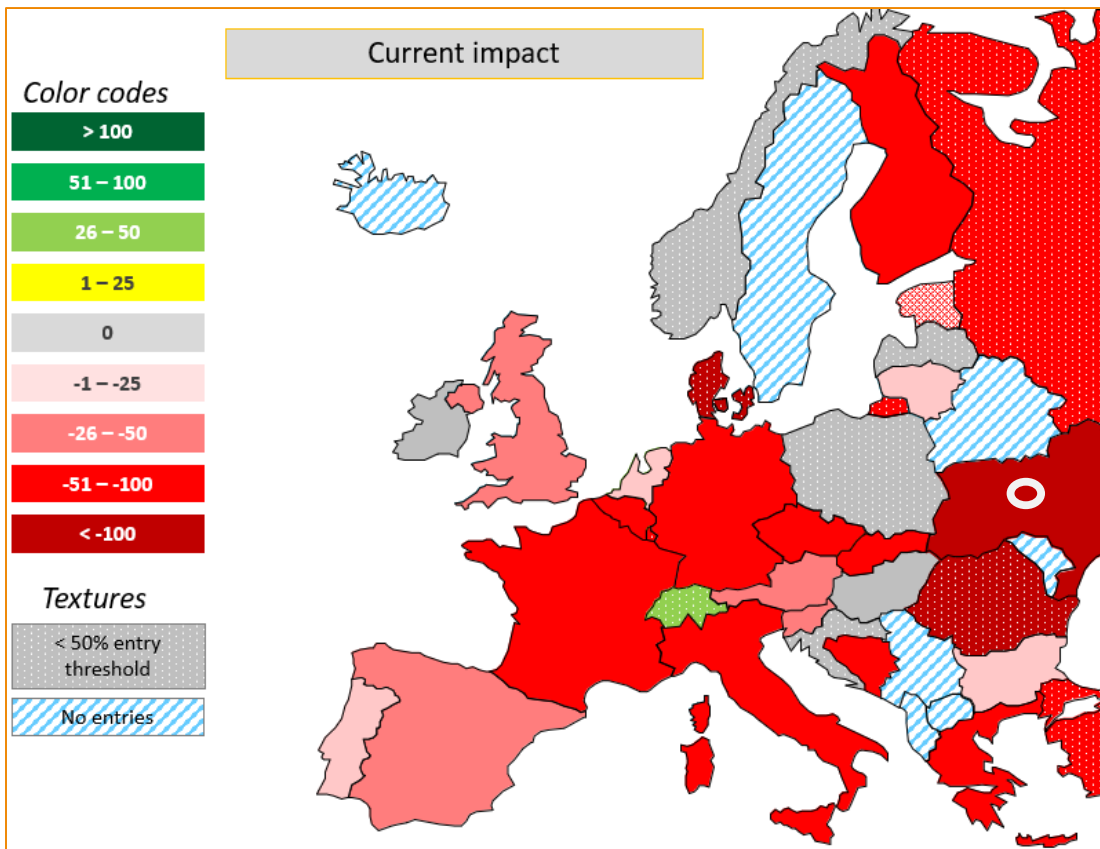


While the global figures indicate that almost half of the respondents (45%) are seeing a negative impact of the current events, language companies are clearly more severely hit (60%) than independent professionals (39%).

The majority of those who do not report a significant current impact (almost half of the participants) do not expect this to change in the future. At worst, they expect a small negative impact.



Not all countries are alike



The impact of the war in Ukraine is felt in the whole of Europe, though not to the same extent in all countries.

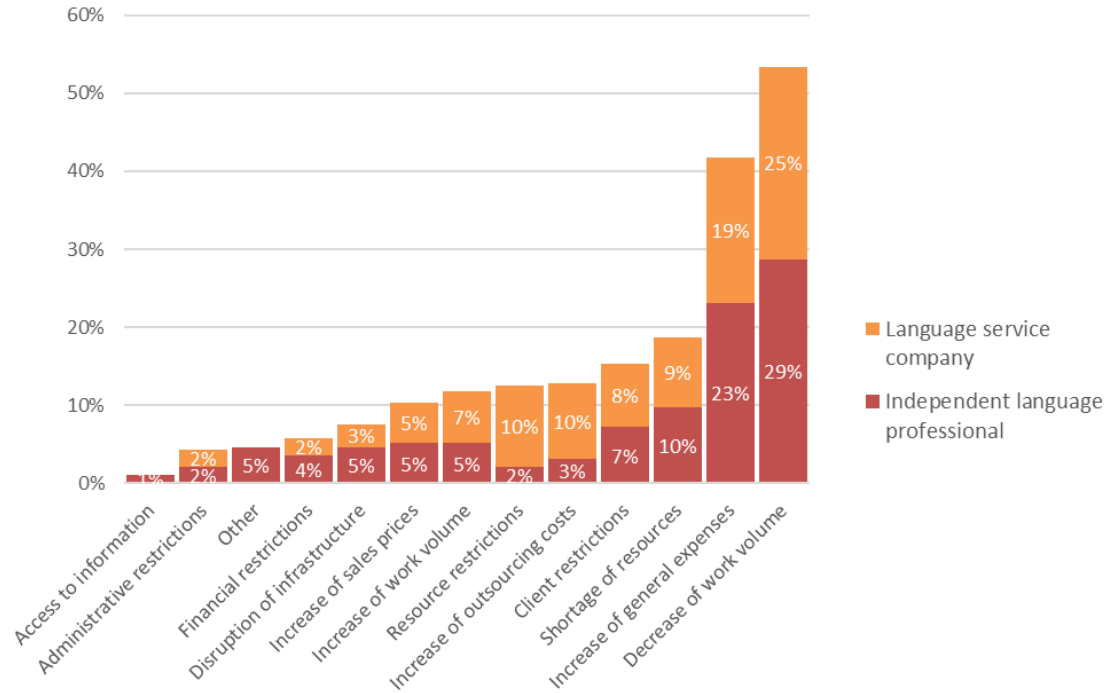
Some of Ukraine's (near) neighbours report a severe negative impact, while others do not, but the number of responses from those countries does not allow for reliable conclusions regarding a direct effect of the war on the local language industry.

The widespread impact seems to indicate that it is mainly related to secondary effects such as price increases.

Not all impacts are alike



Impact types - independent professionals and LSCs



Independent professionals and language companies are mostly worried about decreasing demand, immediately followed by the increase of the general operational costs while the often debated shortage of resources, and client or resource restrictions seem to have a lower impact.

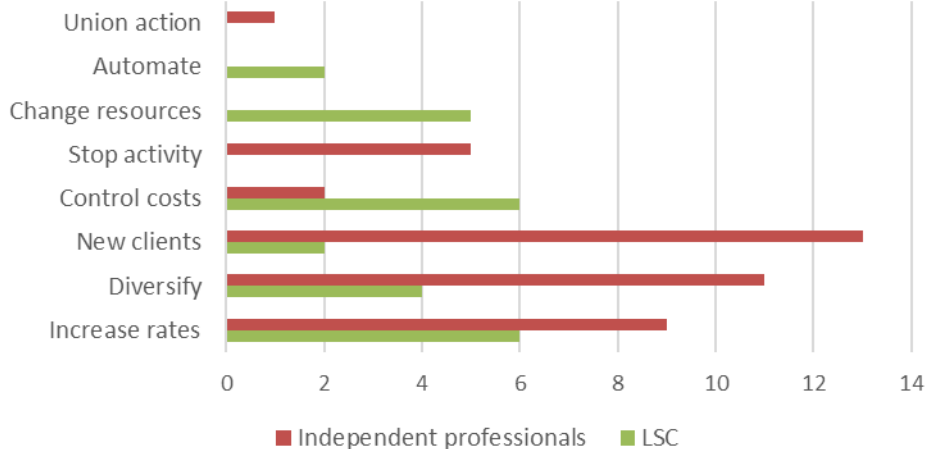
The combination of the two main concerns can severely undermine the viability of any business, in particular small and medium sized ones.

38% expect a normalisation within the year, but another 38% do not see an improvement in the foreseeable future.

Not all remedies are alike



Remedies



Independent professionals and language companies are taking very different measures to cope with the impact of decreasing demand, resource restrictions and loss of revenue.

The hardest hit professionals are massively looking for new (and more lucrative) customers and segments and are in some cases seriously thinking about leaving the language profession.

Rate increases are on everyone's mind, while language companies are also looking at how to reshape their business and cut costs.

In general, governments are called upon to find ways to end the war and to bring the cost of living back under control. With regards to the language industry, several respondents repeat the call for additional regulation, in particular for specific types of work.

Associations are challenged to facilitate business and relief actions with measures such as information hubs and templates to reduce red tape for refugees.



Current language industry actions



- EUATC grouping information about relief actions that are supported by national associations and their company members (cf. www.euatc.org)
- GALA's quarterly Pulse survey early July will focus on Ukraine relief actions
- ELIA is working together with Translators Without Borders for all Ukraine relief actions
- FIT Europe will soon be conducting a survey of the associations to learn more about their approach to the handling of crisis situations



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Thank you

This presentation and the ELIS 2022 follow-up report
can be downloaded from the elis-survey.org repository
(registration required)

Comments and suggestions are welcome at
research@elis-survey.org



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Panelists



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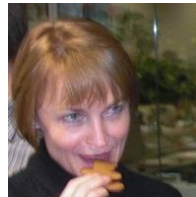
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