Studies on translation and multilingualism

The size of the language industry in the EU

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Study report to the Directorate General for Translation of the European Commission

Final version

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Study on the size of the language industry in the EU

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Under Dr. Rinsche's leadership, LTC continues to operate as a multilingual consultancy, service and software distribution company whereas software design, development and support was transferred to Agile Web Solutions Ltd. with offices in London and Bonn, Germany.

Dr. Rinsche co-ordinates LTC's internal and EU funded research and development projects, market studies and trials. She was appointed evaluator for several Calls for Proposals of the European Commission, and reviewer for several EU project evaluations.

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This study is carried out on behalf of the Directorate-General for Translation of the European Commission (contract ML-STUDIES-08).

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Executive Summary

The present document is the final report of a six-month study conducted by LTC which addresses the need of a comprehensive and systematic analysis of the size of the language industry in the European Union. As well as presenting a snapshot of the current situation, estimates are provided of how the industry will develop in the future.

Thorough secondary and primary research allowed to propose an estimated value of the language industry within the European Member States of **8.4 billion €** for 2008. This figure comprises the industry sectors of translation, interpreting, software localisation and website globalisation, language technology tool development, language teaching, consultancy in linguistic issues and organisation of international conferences with multilingual requirements. In addition, it includes language-related activities performed in corporate environments.

Market forecast

Taking into consideration all sources of information as explained in more detail below, the **annual compounded growth rate** was estimated at **10%** minimum over the next few years, resulting in an approximate value of the language industry of **16.5 billion €** in 2015. The language industry seems to be less affected by the financial crisis than other industry sectors. Where turnovers from multilingual business activities have been negatively impacted, this has been mainly in the case of individuals and micro-companies dependant on a small number of clients, a quick recovery and continued steady growth of the market is forecasted. Although this forecast is highly speculative due to fragmented information available on the industry, it should be considered conservative. Further research is required to confirm that the real value of the language industry can be expected to be well above 20 billion € by 2015.

In the future, the impact of multilingual competence on economic productivity should be analysed systematically in order to arrive at a percentage of the value generated by the language industry on the economic output of European countries and Europe as a whole. Currently, multilingualism and its importance is underestimated. When implementing subsidiaries in other countries, staffing, office location and facilities are of primary concern to the management, whereas proper presentation of a foreign company's products and services in the target country's language and the impact of this aspect whilst competing with national competitors is often underestimated, especially by SMEs with limited funds. Failure abroad is usually attributed to general management weakness rather than target language related failures. In many cases, it is incorrectly assumed that localising a website into a language of a target country is sufficient to generate sales.

The increasingly better understanding of the importance of the language industry for successful globalisation is reflected in the fact that investment companies are showing increasing interest and are buying stakes in language companies.

It is nevertheless necessary to actively and visibly address and promote the importance of overcoming language barriers in order to ensure economic success for European companies within and outside Europe much more than is currently the case.

Results and Conclusions

Data collected through the sources mentioned in the study methodology section of this summary was analysed by sector and country in order to draw significant conclusions. All materials consulted were then classified and inserted into a searchable knowledge base delivered to the European Commission with the final report. In addition, for every Member State a comprehensive country fact sheet was created, containing statistical information about the Member State, a list of professional organisations contacted, information about the national statistics office, a list of authorities contacted and whether they have provided any data. Most importantly, the fact sheets contain a list of the publications collected, divided by sector and sub-sector. In some cases, the main findings of the publications are summarised in the single fact sheets.

For the majority of countries, the data retrieved allowed for an estimate of the value of translation and interpreting in the specific country. Only in very few cases a country-specific estimate of the value of other sectors was feasible as a result of official sources of information.

In the case of translation and interpreting, the figures provided for individual countries were combined and the missing values (for those countries where no data was available) were estimated. This led to an assumed value of the translation and interpreting sector, comprising software localisation and website globalisation activities, of **5.7 billion €** in 2008.

For the remaining sectors, relevant publications were taken into account to estimate the total value. For the year 2008, the sector of language technology tools was estimated at **568 million €**, the sector subtitling and dubbing at **633 million €**, language teaching at **1.6 billion €** and multilingual support within conference organisation at **143 million €.** It is important to point out that all figures above include the value generated in corporate environments by employees directly or indirectly responsible for multilingual data processing.

For those sectors where information is available in some Member States, it is believed that the same kind of data could be produced in the same format by the other Member States as well, leading to a solid base of comparison for more reliable future market estimates.

Due to the lack of accurate data as explained later in this summary, the figures derived about the size and the volume of the language industry in Europe are often based on assumptions and must therefore be considered highly speculative.

Some of the additional findings that emerged from secondary and primary research are summarised as follows:

- As regards the sector of translation and interpreting, market consolidation continues and this trend is likely to remain constant in the future. As a result, the currently fragmented nature of the language industry will continue to consolidate into larger commercial entities. Data shows that a smaller number of increasingly larger players seem to dominate the field with growing presence in Eastern Europe.

- Entry barriers to the field of translation and interpreting are low. The main consequence is increasingly fierce and sometimes unfair competition, as well as a decrease in prices combined with a decline in quality levels. The new EN15038 certification designed to counteract this trend seems to be well implemented across Europe but only addresses quality issues partially and therefore appears to require amendments.

- In order to deliver appropriate output as required for successful foreign market penetration achieved by the clients of multilingual experts and LSPs, and to prevent unqualified players from entering the language industry, the results confirm that the profile and image of language experts need to be raised and their remuneration increased accordingly. Growing needs for specialised domain and technological skills should be better addressed by universities and colleges offering linguistic qualifications.

- In the sector of language technology tool development, the focus continues to be on linguistic tools. Linguists' resistance to machine translation is decreasing. It seems very likely that the use of machine translation will grow to cater for exponentially rising translation needs in increasingly globalised contexts, combined with a considerable lack of properly skilled human resources. Visibility and acceptance of machine translation is supported by the efforts and availability of tools free of charge by Google and Microsoft. The number one in machine translation continues to be Systran, followed by Google in second place. Machine translation capability is likely to be increasingly embedded in multilingual workflows. Translation support tools and workflow automation are likely to be used more widely, supporting and increasing the speed and the quality of multilingual output, at the same time decreasing the cost of human efforts. Tools currently developed and designed appear to become more and more sophisticated as professional tools for highly specialised language experts. It is worth mentioning that the majority of tools are developed in Europe and that this strength should be supported further.

- The sector of subtitling is in clear need of regulations on a European level in order to counteract trends such as peer-to-peer subtitling and outsourcing to Asian countries, which result in decreasing quality levels.

- English, German, Spanish, French and Italian continue to be the most widely used languages throughout Europe. The use of regional languages is supported and

increasing, e.g. in countries like the UK (Welsh and Scottish Gaelic), Ireland (Irish Gaelic has become an official language in the EU), Spain and Malta. Crowd sourcing is likely to contribute to the survival and strengthening of regional and minority languages.

In addition to estimating the turnovers for the single sectors, some countries were highlighted as "best practice examples" on the basis of the reliability and accuracy of data provided.

- For the sector translation and interpreting: Belgium, Denmark, Estonia, Finland, Germany, Italy, Lithuania, Romania and Slovenia.
- For the sector of subtitling and dubbing: Slovakia.
- For *private* language tuition: the Czech Republic, Finland, Slovakia.
- For *institutional* language tuition: Austria, Slovakia, the United Kingdom.
- For language technology tool development: France.

For the remaining sectors, no countries could be pointed out as examples of best practice as regards data provision.

Recommendations

Given the issues encountered at data provision level with the national authorities, it is considered of utmost importance to ensure systematic and consistent reporting on language matters across Europe by introducing accurate measures at national statistics offices in all Member States. In countries with a system of autonomous regions, such as Germany, national governments should be encouraged to ensure consistent reporting across their regional authorities in order to present unified statistics for the entire country. Once comparable statistics are generated on a European level, they can provide a basis for further evaluation and foreign language policy planning.

The primary research was based on more than 1000 valid responses across Europe. Whilst this leads to reliable analysis results at European level, the respondent rate per country (on average 40 and a lot less for the smallest countries) across the 27 Member States should be increased in future studies across all sectors to allow for more precise conclusions at national level or per sector in a specific country.

According to industry experts, in 2008 Europe had a major share of the global revenues generated by multilingual services. This exceptionally high share of the market underlines the potential and the rich source of income represented by the language industry to the EU economy. Research shows that the language industry has the highest growth rate of all European industries in Europe. In order to be able to capitalise on this asset, in an

environment of increasing globalisation and growing need for multilingualism, the language industry needs to be better understood, sustained and stimulated.

In order to be exploited to the maximum, a report of this kind should reflect the dynamic character of the language industry and hence be regularly updated to represent a solid basis of comparison to study the developments of the industry, draw appropriate conclusions and take measures in terms of political planning and commercial investment. Without doubt, additional valuable information can be provided by knowledgeable readers of this report. It is therefore recommended to introduce a c certain element of crowd-sourcing and joint efforts by interested parties, taking advantage of the latest web technology available via the internet, allowing suitable individuals and organisations to regularly contribute to and take advantage of updated information. This is of course subject to regular monitoring and validation by experts within the European Commission or by suitable subcontractors.

Study methodology

In order arrive at an estimate on the total size of the language industry in the European Union, systematic and comprehensive searches were performed across a variety of sources of information such as statistics databases from the European Union, publications by professional associations, databases and other published market research reports. For this purpose, more than 200 national, European and international professional associations were contacted with the request to provide published studies or statistics about the language industry. In addition, in the course of the study more than 100 national authorities were contacted with the request to supply data available on the language industry (or specific sectors) in their respective country. The types of authorities that were contacted include Statistics Offices, Business Registers, Ministries of Education, Tax offices, Ministries of Finance and other entities.

In addition to performing secondary research, a comprehensive questionnaire was developed and distributed among several thousand individuals, language service providers and language service departments across the European Union. In total, more than 1000 participants responded to the questionnaire.

Limitations of the study

Data publicly available at Eurostat and national statistics offices proved to be difficult to obtain and only available for some of the countries and sectors. Inconsistencies at national level propagated to a regional level in the case of the language teaching sector in Germany, where responsibilities lie with regional governments in the *Länder*. Data was therefore provided in a variety of formats and hence not comparable.

As regards data made available by national authorities, statistics proved difficult to be compared since classification codes differed among countries, as did the levels of detail of the

data supplied. In addition, response times were sometimes quite long, which significantly reduced the time available for data analysis.

Notwithstanding the above obstacles, thorough primary and secondary research and considerable work creating a well structured and detailed report have led to results that are more substantial and better founded than other reports that are usually focussed on only one or some of the highly complex aspects of the language industry. Moreover, this report can be used as a starting point for future work according to the results, conclusions and recommendations presented above.

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1. Introduction

Overall, the past decade can reasonably be called the most complex period, as cultural internationalisation grew across all media, with the Internet and globalisation helping, and European integration brought at first 10 and then again another 2 new members into the tightly woven network of the Union. (Wischenbart, 2008)

In the report presented in the following, a thorough analysis of a wealth of secondary data and a collection of comprehensive primary data was achieved. The most important part of the report consists in the result section (page 20).The Methodology chapter (page 2) is important as it shows the thorough and organised approach taken, but can be ignored by the reader who is mainly interested in the outcome of the primary and secondary research.

An overview of the primary research is given in Appendix XI (page 141). We refer to this appendix regularly within the main part of the study, and it contains a wealth of thoroughly analysed statistical material, organised in various types of displays.

In every other respect, the Table of Contents speaks for itself.

2. Deliverables

As per tender, the following will be delivered besides the present report:

1) A web application containing all relevant economic data, names, addresses and contact persons pertaining to relevant organisations in the language industry. Details of this database are discussed in section 3.2, page 16

2) The set of reports used for the desk study in machine readable form on a CD. Due to the fact that a number of copyrighted publications available against a sometimes hefty fee were used as secondary research material for this report, this background material will be provided in one hard copy only.

3. Methodology

3.1. Secondary data collection

3.1.1. Presentation of the materials collected

During the first four months of the project, an abundance of data potentially relevant to the study was collected by consulting the following information sources: publications by professional associations, statistics databases from the European Union, industry and trade publications, published market research reports, databases, policy and legislative documents and web sites.

Moreover – in order to ensure accuracy and reliability of regional data – 116 national authorities in the European Member States were asked to cooperate by providing information about the language industry in their respective country. The types of authorities that were contacted include the following (in order of frequency):

- Ministries of finance
- Chambers of commerce
- Companies Registers (alternative names: Enterprise Register, Companies Registration Office and Institute of Registries)
- Business Registers
- Trade authorities (alternative names: Ministry of Trade and Industry and Investment and Trade Development Agency)
- Ministries of Education
- Ministries of Justice
- Tax offices

The names of the authorities varied in some countries, some examples are included in brackets.

In addition to the national authorities, we contacted 217 national, European and international professional associations requesting published studies or statistics as well as information about their members.

Contacts with authorities and professional associations were established either through personalised e-mails, phone calls or contact forms on the website in those cases where no contact details at all were available.

Out of all professional associations contacted, 108 replied (corresponding to a response rate of almost 50%). Of this number, 9 were not able to provide any data at all while 64 provided at least information about their members. The remaining 35 associations either asked for additional information or referred us to another organisation, but have not provided any data, even though they were reminded several times. A complete list of all associations proving cooperative – including those not able to provide information but still sending kind replies to our request – can be viewed in Appendix VI, page 132.

After the questionnaire was finalised, we re-contacted all associations that had cooperated after first contacting them, with the request to endorse our study among their members and encourage them to fill in the questionnaire. Details about the level of cooperation for the second request will be discussed in Chapter 3.2.2, page 10.

As regards public authorities, a total of 63 replies (corresponding to a response rate of 53%) were collected. In 33 out of these 63 cases, authorities were not able to help at all (in 12 cases we were referred to other national authorities, in 5 cases we were informed that the data could be provided as a paid service and the remaining 16 authorities just stated that the information was not available).

Of the remaining 30 authorities, 2 belong to the category of respondents that replied either asking for additional information or providing different contact details, but have not provided any data so far. In any case, 28 out of 63 authorities – 44% of all authorities contacted – sent some data or statistics. Details about the information provided are discussed in the Methodology section (page 2) and in the Country fact sheets (page 191)

In addition to collecting statistics by contacting the national authorities directly, we performed thorough research at European level. Our search involved Eurostat, the European Business Register and the Organisation for Economic Co-operation and Development (OECD). As we could not find any data publicly retrievable, we contacted the European Business Register and OECD directly to enquire whether any relevant statistics could be made available. Both authorities replied saying that no data specifically about the language industry is being collected. While the European Business Register advised to contact the individual national authorities, the OECD suggested that we ask Eurostat. Our contact with the European authorities is discussed in more detail in section 4.2.1, page 22.

3.1.2. Breakdown of materials by sectors and Member States

So far, a total of approximately 240 secondary sources of information have been collected. The following tables (Figure 1 and Figure 2) show the number of publications collected per sector and per country. It is important to note that some publications were associated to more than one sector and more than one country. Therefore, the total number of publications of both tables does not equal the total number of publications actually collected.

A special remark needs to be made for the case of translation and interpreting: in many cases we encountered material that covered both topics together. This is true for such existing publications and reports where no distinction was made between the two sectors when presenting data. The same proved true in the case of statistics provided by national authorities. As a matter of fact, most statistical classification systems describe "translation and interpretation activities" in one and the same category.

As we pointed out earlier in this report, it proved difficult to retrieve publications for every one of the eight sectors. As a matter of fact, information about the sectors "software internationalisation, localisation and website globalisation", "organisation of international conferences with multilingual requirements" and "consultancy in linguistic issues" was often included in material focussing on other sectors.

Language teaching	92
Translation	87
Interpreting	50
Language technology tools	22
Subtitling and dubbing	14
Software localisation and website globalisation	8
Conference organisation	2
Consultancy	0

Figure 1 – Breakdown of materials by sector

The same difficulty was encountered in the case of countries: while in some cases (e.g. Germany and the United Kingdom) data retrieval proved to be very straightforward, for some other countries the material was not as abundant.

Europe	66	Slovenia	10
Worldwide	40	Finland	9
Italy	24	Latvia	9
UK	23	Poland	9
Germany	19	Portugal	9
Austria	17	Denmark	8
Slovakia	16	Netherlands	8
France	15	Greece	7
Belgium	13	Lithuania	7
Czech Republic	13	Luxembourg	7
Ireland	12	Sweden	7
Hungary	11	Estonia	6
Romania	11	Malta	6
Spain	11	Bulgaria	5
Cyprus	10		

Figure 2 – Breakdown of materials by country

3.1.3. Issues encountered

In this chapter, we will present the main issues encountered during the six months of the project.

3.1.3.1. Inhomogeneity of data provided

Without doubt the biggest and most incisive issue encountered was the inhomogeneity of data provided. At the level of national authorities, no data at all could be provided for the following sectors:

- software localisation and website globalisation
- language technology tool development
- organisation of international conferences with multilingual requirements
- consultancy in linguistic issues and/or multilingual questions

and very limited data was provided for the sector of language teaching.

This is either due to the fact that no specific classification code exists for these sectors, or that the level of detail adopted by the relevant office is not sufficient to describe the sector. For example, the closest classification for "consultancy in linguistic issues and/or multilingual questions“ is “business and management consultancy activities” (NACE Rev. 2 70.22). However, we do not have an empirical basis which allows us to establish the proportion of language-related consultancy out of general business and management consultancy activities. Likewise, while some sectors describe general software activities, no classification describes the software localisation and website globalisation market in detail. The same can be said for the remaining two sectors of the list above (“language technology tool development” and “organisation of international conferences with multilingual requirements”).

In the case of “subtitling and dubbing”, data is comprised in the NACE Rev. 2 code 59.12 (Motion picture, video and television programme activities), which encompasses a range of activities not directly related to subtitling and dubbing. Therefore, extracting information about subtitling and dubbing from figures referring to sector 59.12 would not lead to credible results.

A special mention needs to be made as regards “language teaching”. Most authorities that provided any information for this sector sent data referring to the NACE Rev. 1.1 code 80.42 (adult and other education non elsewhere classified): this was the case for the statistical offices of Cyprus, Denmark, Portugal, Slovakia and the UK. Other authorities (e.g. national statistics offices of Estonia and Greece) provided information for the NACE Rev. 2 sector 85.59 (Other education not elsewhere classified). In both cases, the code is too broad and comprises language schools among other educational institutions. Since we do not have any evidence as

regards the proportion of language schools for the sectors 80.42 and 85.59, the information produced by authorities about these two codes will not be used to calculate the size of the language teaching sector in Europe. Only very few authorities (for example the National Statistics office of Slovenia) sent data about the NACE code 80.42.1 ("language schools").

For all of the sectors above, any estimate of their size and volume within the European Union will rely on sources of information not related to national authorities.

The only sector allocated to a unique classification code is translation and interpreting, as described in the paragraphs below.

In general, data were provided by authorities in a variety of formats and levels of detail, ranging from NACE Rev. 1.1 to NACE Rev. 2 and national classification codes (such as ATECO 2002 in Italy, SIC 2003 in the United Kingdom and SKD 2008 in Slovenia, see Appendix II, page 97), and from 3-digit to 5-digit levels of detail.

The NACE structure developed at EU level and including the 4-digit level and above is used by all European Union Member States. Some countries decide to add a 5-digit subclass level to their national version of NACE to describe their economic activity at a more detailed level and these subclasses created vary from one Member State to another (National Office for Statistics, 2009).

For example, while the code 74.85.2 represents "translation companies" in Germany (Statistisches Bundesamt, 2009a; Statistisches Bundesamt, 2009b), the same code describes "translation and interpretation activities" in Belgium (Social Security Service Belgium, 2009). Each country that decides to add a 5-digit Subclass level performs its own consultation of national interests and then creates subclasses based on the feedback received.

This lack of consistency leads to considerable difficulties for objective data analysis and comparison. As an example, in the case of authorities still operating with the NACE Rev. 1.1 codes, data on translation were mostly included in the code 74.85, which comprises "secretarial and translation activities", as opposed to the more detailed NACE Rev. 2 code 74.30 referring to "translation and interpretation activities" only (Eurostat, 2008a). An excerpt of the correspondence table between NACE Rev. 1.1 and NACE Rev. 2 for translation activities can be seen in Figure 3.

NACE 1.1 class	74.85	Secretarial and translation activities
74.30	Translation and interpretation activities	Translation and interpretation
82.11	Combined office administrative service activities	Combined secretarial activities
82.19	Photocopying, document preparation and other specialised office support activities	Specialised secretarial activities: - typing - transcribing from tapes or discs - proofreading - photocopying etc.
82.99	Other business support service activities n.e.c.	- Telephone based support, except call centres and computer based phone support - Stenographic services during life legal proceedings and transcribing subsequent recorded material

Figure 3 – Excerpt of the correspondence table between NACE Rev. 1.1 class 74.85 and NACE Rev. 2. (Eurostat, 2008a)

From this table the substantial difficulty encountered with data about the translation and interpreting sector becomes evident: what used to be class 74.85 "Secretarial and translation activities" according to NACE Rev. 1.1 has been split up into four different classes with the new NACE Rev. 2 classification system, meaning that information is much more detailed at NACE Rev. 2 level than at NACE Rev. 1.1 level. An overview table of the classification codes used by the national statistics offices can be viewed in Appendix II, page 97.

Inhomogeneities were encountered not only on the data provided by the authorities, but also among the publications that were provided by the associations. While in some cases we received very detailed reports made available over a number of years (e.g. the Association of Romanian Translation Agencies), some other associations provided just some isolated facts about their organisation. Likewise, reports gathered through the internet have a variety of formats and levels of detail. All in all, many contents have been useful and relevant for the study.

3.1.3.2. Representativeness of data provided

As initially agreed, the sectors to be analysed in the report are eight in total: translation, interpretation, subtitling and dubbing, software internationalisation, localisation and website globalisation, language technology tool development, conference organisation, language teaching and consultancy. While for some of these sectors a wealth of publications exist (e.g. translation), some others are rarely described or documented in isolation (e.g. consultancy in linguistic issues).

3.1.3.3. Response times

The phase of data collection concerned with contacting the above mentioned associations and authorities has proven to be far more time-consuming than expected, in spite of the following precautionary measures: in order to allow the recipients of our message to attend to the request in the shortest time possible, direct contact details of the relevant person or office were retrieved during a preliminary investigation; secondly, all messages were personally

addressed to the recipients and to their organization to increase the probability of a response. Finally, the request was worded as clearly as possible, stating the purpose of the study as well as the specific requirements for the data to be delivered. Despite these preventive measures, the majority of addressees had to be reminded of our study several more times after the initial request by e-mail and by telephone, resulting in a considerable delay in data collection (the average response time ranged between four and six weeks with some peaks of 12 weeks). Our effort however paid off and the results are promising, with a total of 161 replies from associations and authorities (including some negative replies).

3.1.3.4. Language barriers

A difficulty in communication has emerged during data collection, which we anticipated considering that the EU currently comprises 23 official languages. Difficulties arose at three different levels:

1) Language barriers at first contact: while communication happened flawlessly with almost all associations, language represented a more concrete obstacle when dealing with the national authorities.
2) Language barriers within publications: an issue that emerged during data collection was the fact that many publications, reports and statistics are written in languages other than English.
3) Ambiguity of data provided: in addition to resources already published, we encountered difficulties when analysing and classifying statistics provided by national authorities, which were due either to the fact that information was translated into English, or to the lack of clearly defined terminology. As an example, our request for "number of employees per activity" was addressed with information about "employees" (e.g. COFACE, Belgium), "wage earners" (e.g. Statistics Belgium), "workers" (e.g. Czech Statistical Office), "number of persons employed [...] of whom employees [...]" (e.g. Statistics Denmark). However, we believe that discrepancies due to this type of difficulty will not lead to a severe bias of data.

3.1.3.5. Data provision not in line with company principles

Some big players do not provide data or any kind of background information as a matter of principle, e.g. Skrivanek (according to the owner Pavel Skrivanek). Other large LSPs are in a transitory period, which, explains the reluctance of providing data for instance in the case of CLS Communications a majority share of which was obtained by a US investor.

3.1.3.6. Reliability of data

Data provided by statistics offices were not necessarily always reliable. For example, the size of Italy's language industry seems big in comparison with other countries. However, the data provided was substantial and detailed (see chapter 4.7, page 81). We would therefore

conclude that the data made available by the other countries representing big languages – such as France and Germany – are restrictive and most probably do not contain all information that could be retrieved in principle. We therefore assume that the size of the language industry can be estimated as even larger than estimated in this report where estimates are based on official figures as far as possible.

3.2. Questionnaire

3.2.1. Presentation of the questionnaire

In order to be able to verify and compare the findings of the secondary research with actual market data, a questionnaire was developed and distributed among more than 1000 language service providers located across the European Union.

The development phase of the questionnaire spanned over a period of eight weeks and was based on the deliverables of the project. In order to develop a relevant and comprehensive survey, previous questionnaires performed within the language industry were studied as a reference (e.g. Statistics Canada, 2006). Questions were structured and standardised to ensure reliability, generalisability and validity. Moreover, they were formulated ensuring that respondents were addressed in the most objective and neutral manner. The questionnaire was developed in close collaboration with LTC's contact in the European Commission.

As an incentive to participate, all respondents were informed that the final report will include a list of all contributors to the study and that they could decide whether they wish to be included into this list or not[1].

Moreover – in order to obtain maximum participation – we decided that the time needed to fill in the questionnaire must not exceed 10-15 minutes. We therefore developed three versions of the questionnaire customised to three different target groups (see Figure 4):

- Individuals and micro-organisations
- Larger sized language service providers (LSPs[2])
- Corporate, institutional and governmental language service departments

[1] In total, out of 658 respondents who completed the questionnaire in full, the distinct majority (526 out of 658 or 80%) have expressed their desire to be included in the list of contributors to the study.

[2] For the purpose of the study, we define a LSP as a language service provider with at least 10 employees.

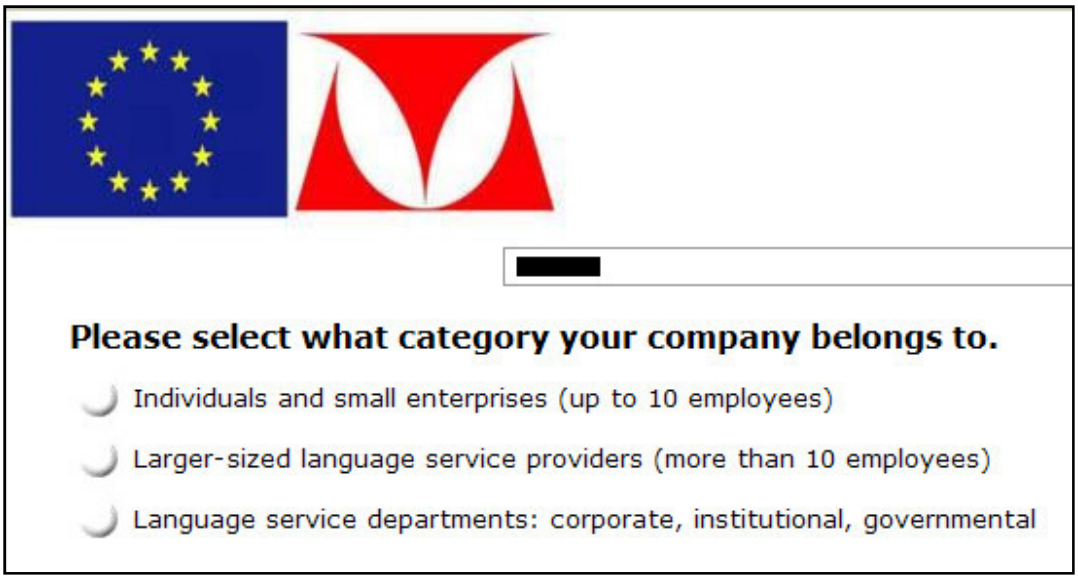

Figure 4 – Screenshot of first question

The full questionnaire for the larger-sized LSPs can be viewed in Appendix III, page 98.

Even though three distinct questionnaires imply more complexity at data analysis level, this solution allowed us to increase the response rate by customising the questionnaires and hence reflecting the types of participants better. Questions were worded according to each target group and simplified as much as possible, which meant that every respondent was only asked questions that were fully relevant to their group. Prior to contacting the respondents, a small pilot study was run for each of the three questionnaires to ensure ease of use and to eliminate potential technical issues.

3.2.2. Criteria used to create the addressee list

During the first month of the project, a list of 1024 LSPs based in the European Union to be contacted for the questionnaire was created through random sampling. Where possible, the contact details of the managing directors were retrieved, to maximise the response rate. Alternatively, contact details of the person deemed most relevant were added to the list.

The distribution of addressees for each European Member State is based on the number of employed citizens in the European Union (Eurostat, 2008b). Out of a total population of 499.7 million, 218.5 million are employed[3], and the distribution of the employment among the member states is listed below.

[3] (Romans & Preclin, 2008)

country	Employment (million)		
Germany	38.2	Hungary	3.9
UK	28.4	Bulgaria	3.3
France	25.6	Denmark	2.8
Italy	23.2	Finland	2.5
Spain	20.4	Slovakia	2.4
Poland	15.2	Ireland	2.1
Romania	9.4	Lithuania	1.5
Netherlands	8.5	Latvia	1.1
Portugal	5.2	Slovenia	1.0
Czech Republic	4.9	Estonia	0.7
Sweden	4.5	Cyprus	0.4
Greece	4.5	Luxembourg	0.2
Belgium	4.4	Malta	0.2
Austria	4.0	**Total**	**218.4**

Figure 5 – Distribution of employment in the 27 Member States of the European Union

The table above is shown as a bar chart in Figure 6, below.

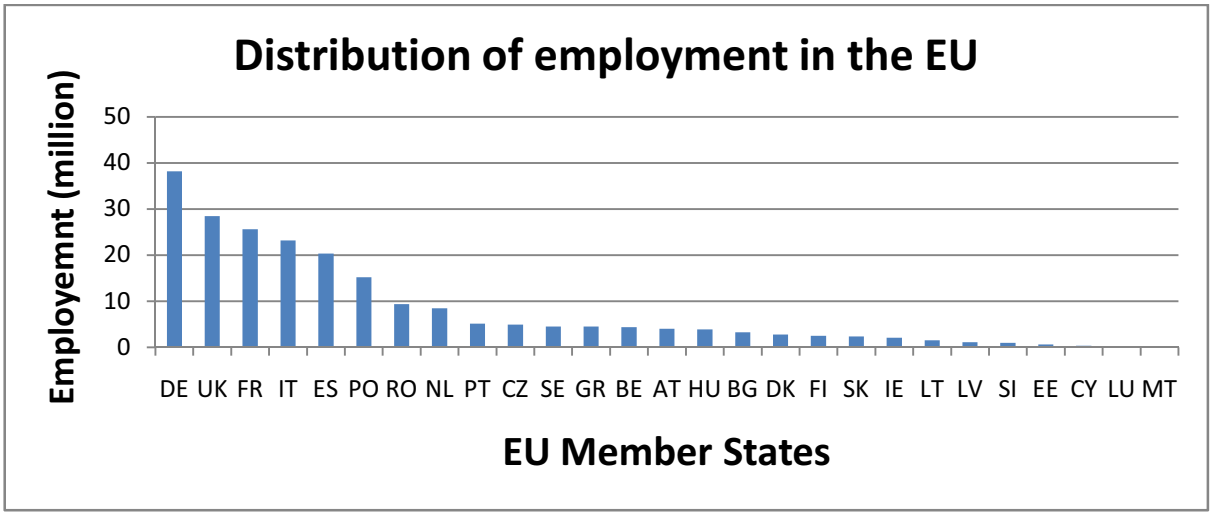

Figure 6 – Distribution of employment in the 27 member states of the European Union (sorted by employment). (Eurostat, 2008b)

The list of study participants was selected from a variety of sources:

- List of European Union contractors
- GALA (Globalization and Localization Association)
- Yellow Pages
- ProZ (*networking platform for freelance translators and translation agencies*)
- TranslatorsCafé [sic] (*The second largest translation marketplace in the world and on the Internet*)

- LTC's CRM[4] system containing several thousands of contact details of LSPs worldwide.
- ITI (Institute of Translation and Interpreting)
- IoL (Institute of Linguists)
- BDÜ (German Federal Association of Interpreters and Translators)
- ATC (Association of Translation Companies)
- ABTR (Association of Romanian Translation Agencies)
- ACT (Asociación de Empresas de Traducción), Spain
- CNET (Chambre Nationale des Entreprises de Traduction), France

In addition to the LSPs mentioned above, we invited the managing directors of the largest companies based in Europe to participate in the study and to fill in the questionnaire. Of the 30 largest LSPs worldwide - based on the most recent Common Sense Advisory report dated May 2009 (see Appendix VII, page 136). we included those companies also listed in the ranking published in 2008 (Beninatto & DePalma, 2008) on which our research was based, whereas LSPs included in the earlier list but not figuring in the most recent ranking were left aside for this report.

Every one of the more than thousand potential participants was addressed with a personalised message, containing the contact name as well as the name of the language service provider. Following our initial e-mail campaign, we increased the response rate by re-contacting the most relevant LSPs several more times with follow-up e-mails and telephone calls.

In addition – to reach as many potential respondents as possible – we asked a number of associations to encourage their members to participate. The cooperation has been beyond our expectation and in total 15 associations agreed to endorse our research, either by contacting their members by e-mail or by putting a link to the study onto their website. A List of these associations is included in Appendix VIII, page 137. Appendix IX, page 138 contains a selection of examples of how they have contributed towards a high response rate.

The link provided by the associations to their members refers to LTC's website on which a short description of the study is available and which points to the survey. A screenshot of this page can be viewed in Appendix X, page 140.

In addition to involving associations to endorse our survey, we increased the response rate even further by publicising the study through leaflets and personal promotion at the following conferences:

[4] CRM – customer relationship management

- *Localisation World – the leading conference for Localisation and Translation Professionals*[5]*, 8 – 10 June 2009 (Berlin, Germany)*
- *LISA (Localisation Industry Standards Association) Forum, 22 – 25 June 2009 (Tallinn, Estonia)*

Therefore, the questionnaire was kept live until the 25th of June.

As of 14th July, the site has had more than 3700 views, suggesting considerable EU-wide awareness of the study. A timeline of the numbers of access to the site can be viewed in Figure 7.

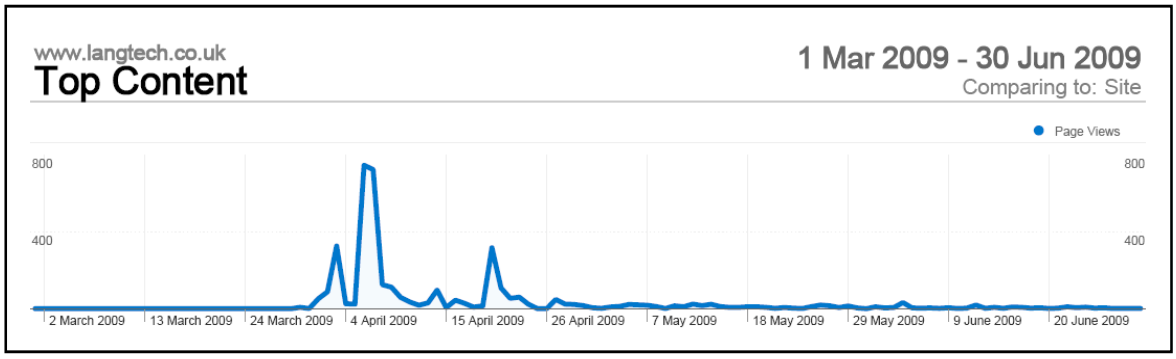

Figure 7 – Page statistics: number of clicks on DGT study as represented on LTC homepage. Total views: 3733.

3.1.1. Data on responses and their representativeness

By 25th June 2009, the total number of participants that have at least partially completed the survey amounts to 2037. 658 responses take into account respondents that have completed the questionnaire in full, which more than doubles our initial target of 250.

It is important to point out that apart from the 1024 LSPs that were contacted personally, it is not possible to track the number of potential respondents that have been pointed to the survey by the associations. Since the total sample size is unknown, the response rate cannot be calculated according to its traditional definition (number of respondents divided by total sample size). Hence, the response rate was calculated by taking into consideration the number of completed surveys over the number of surveys started but not completed. With this calculation, the resulting response rate is 32%, which is exceptionally high compared to similar studies (cf, for instance, CNET 2007 with 40 replies out of 389 or 10.3% response rate and the ASSIM study, 2000, with 1500 exploitable returns out of 15 000 questionnaires distributed, or 10% response rate).

[5] http://www.localizationworld.com/

In total, the distinct majority of respondents (536 out of 658 or 81%) have expressed their desire to be included in the list of contributors to the study.

3.1.2. Data on representativeness of the sample for each Member State

Overall, responses have been registered from all 27 Member States and a geographic distribution of all questionnaires completed by language service providers belonging to the first two categories can be viewed in the figure below.

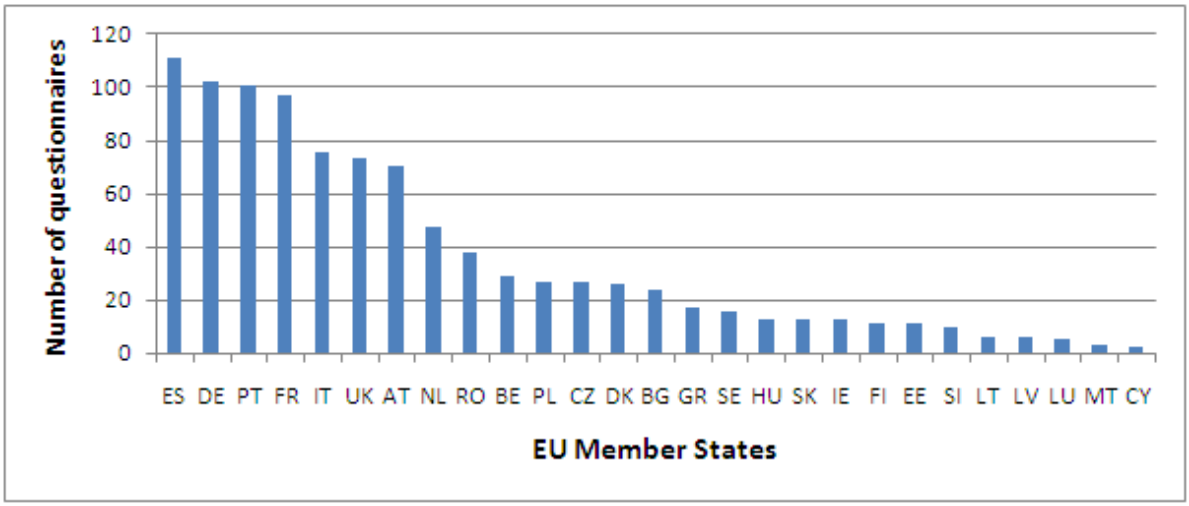

Figure 8 – Geographic distribution of completed questionnaires (category I and II)

On the whole, this distribution roughly follows the percentage of working population in the European Union. A direct comparison of the responses and the respective national employment is shown in the figure below.

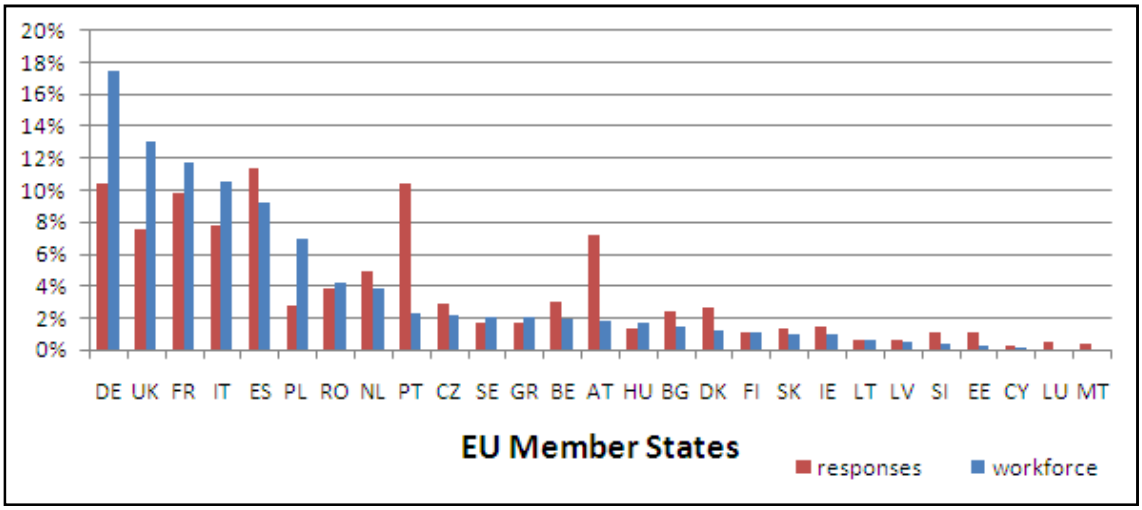

Figure 9 – Comparison of responses (category I and II) versus employment in the EU

It needs to be kept in mind, however, that the distribution of EU employment was used as an initial reference to establish the proportion of participants for every country.

3.1.3. Data screening for first two target groups

On 26 June, all responses were downloaded from Survey Monkey. It is important to point out that whenever respondents answered the screener question ("Please select what category your company belongs to"), an entry (i.e. a response) was created by Survey Monkey. In total, the dataset contained 2037 entries.

Because of the different nature of language service departments as opposed to LSPs and individuals, the data analysis was planned separately for the third category of respondents (language service departments). For the first two target groups, the dataset was screened according to the criteria described below.

All responses from the third target group (Language service departments: corporate, institutional, governmental) were excluded from further analysis, leaving the responses from the first two target groups (individuals and small enterprises and larger-sized LSPs).

Then, the dataset was screened for duplicate entries, both in terms of IP addresses[6] (i.e. for responses that had the same IP address) and in terms of identical entries to the first question of the questionnaire (the field "name of language service provider"). In order to exclude duplicate responses in these cases systematically, the most recent response was kept and all previous responses were excluded from the dataset.

The next step implied screening the dataset according to the responses provided: all respondents that had not provided an answer to the first ten questions have been excluded from the study.

When browsing through the dataset of language service departments, it became evident that some LSPs had erroneously categorised themselves as LSDs and therefore filled in the wrong questionnaire. For these cases, responses were moved to the dataset for LSPs and analysed accordingly.

The steps above left the dataset with a total of 1103 respondents belonging to the first two target groups.

[6] Every entry is identified by a sequential respondent ID (automatically assigned by SurveyMonkey), by the date and time the questionnaire was started and completed and by the IP address of the respondent. Multiple entries from the same IP address were accepted in order to allow respondents to fill in the questionnaire from a shared computer or workstation. However, this also implied that the questionnaire could potentially be filled in more than once by the same respondent.

3.1.4. Data screening for the third target group

Out of a total of 137 respondents within this target group, 88 were excluded from the study for the following reasons:

- 69 entries were totally blank
- 7 were identified as LSPs and therefore their responses were moved to the dataset of LSPs.
- 5 entries belonged to the same company and were identical, therefore 4 were removed
- 4 respondents provided random answers for the questions
- 3 respondents were excluded from the study because they have aborted the questionnaire before answering the first 10 questions.

The remaining dataset contained 49 responses. A list of these highly relevant organisations is included in Appendix IV, page 117. Information provided by language service departments (LSDs) cannot be directly compared to findings from the first two target groups (LSPs and individuals and small enterprises) and therefore a separate analysis of the data is required. We propose that the analysis of the information provided by the organisations belonging to the category of LSDs should be done at a future stage.

3.2. Web application

3.2.1. Description of the application

The web application displays the contents of the most important resources consulted, as well as a list of relevant organisations in the language industry with their main contact details. Each publication is classified according to the main sector or sectors (e.g. “translation”, “subtitling and dubbing”), the country (or countries) and other relevant keywords (e.g. “future trends”, “market size”).

The final product consists of a web interface from which users can select a range of criteria such as:

- Sector,
- Country,
- Language,
- Keyword and
- Name of organisation (see Figure 10 for screenshot of the application).

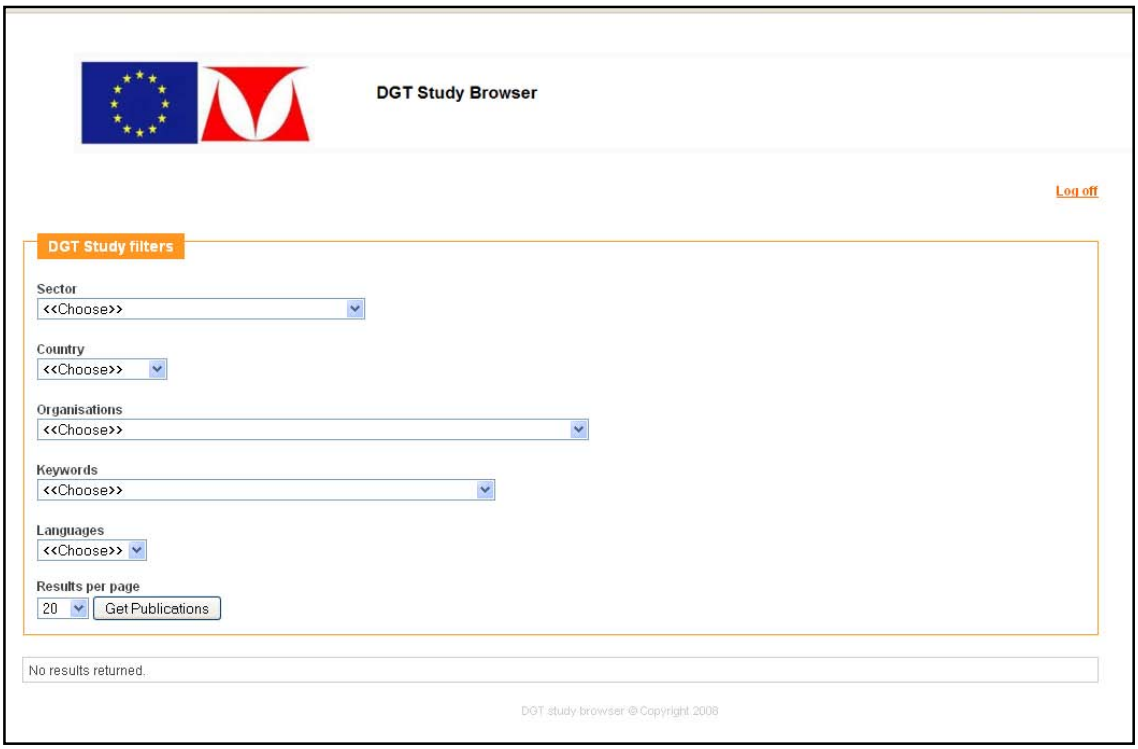

Figure 10 – Screenshot of web application: initial interface

Once these criteria are chosen, any matching reports will be displayed by author, title, publication year and relevance of the report, as well as the relevant country, sectors and keywords. Since some publications are in languages other than English, the language will be displayed as well. Every report is followed by a link to the contents and to the organisation responsible for publishing the report (see Figure 11). Due to the fact that a number of copyrighted publications were purchased against a fee, the contents of these reports will not be made available for download. Where possible, a link will be provided to the author's website to allow users to buy the report.

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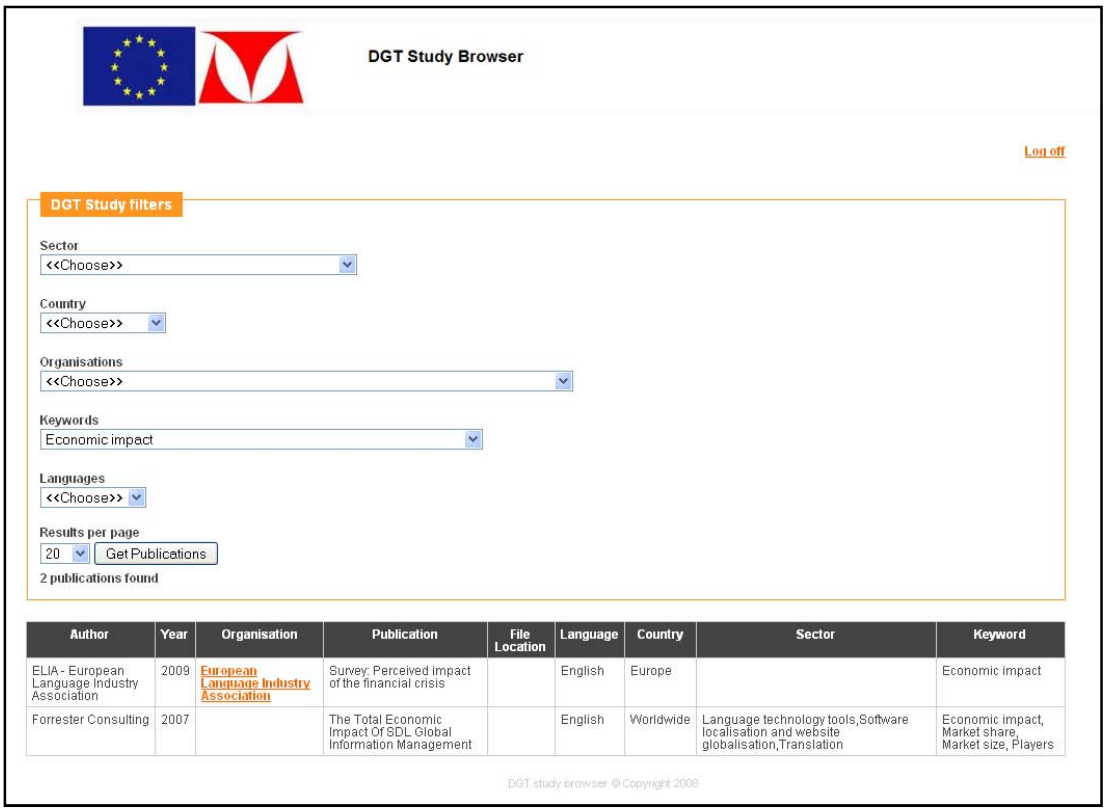

Figure 11 – Screenshot of web application: search results

By clicking on the name of the organisation, users will access a page displaying contact details as well as a list of other publications by the same organisation (see Figure 12).

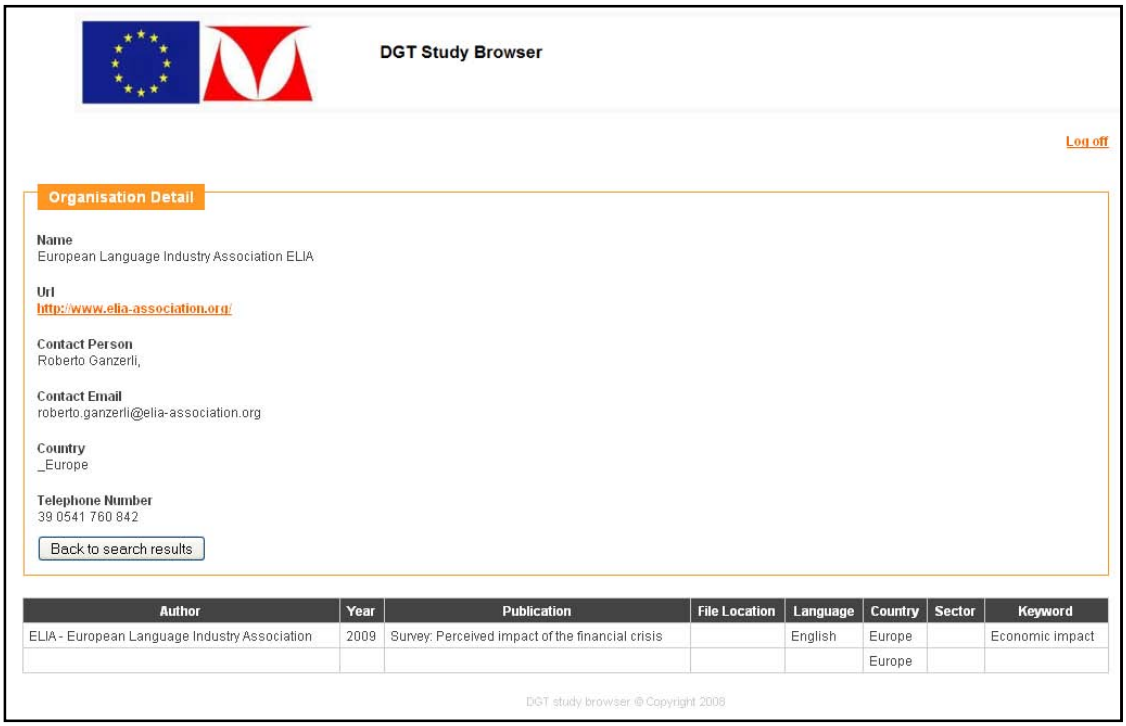

Figure 12 – Screenshot of web application: organisation details

3.2.2. Collecting the data

During the project the data was collected and stored in an Excel workbook with different worksheets used to store the reference data.

Within the individual sheets, text filters were used on the columns to ensure data could be manipulated – this allowed for the data to have some consistency.

For example simple searches or queries could be made on the data, e.g. select data from a single country, several countries or all countries.

Having the data in an Excel workbook has a number of drawbacks, including the difficulty to share the data across a network, and simple queries / filters requires knowledge of Excel functionality.

Therefore one of LTC's software developers spent some time building a web site offering the following features as described in the next section.

3.2.3. Features

- Web pages to browse the data by means of queries driven by option drop downs , e.g. find all references to documents where country = UK.
- This type of query would initally provide a summary list of avaliable documents which could then be selectively browsed.
- Access security to the web pages is controllled by users / passwords.
- Admin pages to manage uploading new documents, creating new users, creating new searches, etc.

3.2.4. Technology

- Data stored on a SQL database, so multiple simultaneous searches and access is possible without conflict
- Frontend developed in ASP.NET.
- Documents are avaliable via the web site. These documents are in different media formats, e.g. .pdf and .doc documents

4. Results

LTC's survey resulted in the following figures for the language industry:

	Total turnover (million €)							
	2008	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**
Translation and interpreting, software localisation and website globalisation	5 675	6 243	6 867	7 554	8 309	9 140	10 054	11 059
Language technology tools	568	624	687	755	831	914	1 005	1 106
Subtitling and dubbing	633	696	765	842	926	1 019	1 121	1 233
Language teaching	1 579	1 737	1 911	2 102	2 312	2 543	2 797	3 077
Conference organisation	143	157	172	190	209	229	252	278
Total	8 454	9 300	10 230	11 252	12 378	13 616	14 977	16 475

Figure 13 – LTC's estimate for 2008 and forecasts until 2015 of the value of the language industry. Average annual growth rate: 10%

Our estimate of the total value of the language industry amounts to **8.4 billion €** with a very conservative estimate of an average 10% growth rate over the next few years to result in a turnover of **16.5 billion €** minimum in 2015.

Figures for the translation and interpreting sector were obtained by adding up the total revenue for translating and interpreting for the single Member States (see Country fact sheets, page 191). For the six countries where total turnover figures could not be estimated due to the lack of data available (Cyprus, Bulgaria, Estonia, Ireland, Latvia and Malta), we estimated a total turnover with countries that are similar in size and relevance within the EU. We estimate that software localisation and website globalisation activities are included in the figures referring to translation and interpreting representing 25% of the market.

In the absence of more precise figures, we estimated investments in language technology at 10% of the value of the sector translation and interpreting (due to the fact that the language industry largely operates via the internet as virtual entities and require the most efficient productivity tools in order to meet speed, quality and cost requirements of customers with limited budgets). More detailed information about findings of our secondary and primary research can be obtained in section 4.3.4, page 43.

We estimated the value of the subtitling and dubbing sector at 10% of the translation and interpreting sector, which was then confirmed by the secondary data available (see section 0, page 38).

As regards language teaching, a detailed explanation of how the figures were calculated can be found in section 4.3.5, page 75.

The value of the conference organisation sector worldwide was estimated **3.18 billion €**. We assume that approximately 75% of this amount was generated in Europe and of that proportion, 5% could be attributed to organising multilingual support (interpreting including equipment). Further details of the limited findings of this sector can be obtained from section 4.3.6, page 76.

Consultancy was not given a separate value as it is usually delivered along with the other services.

We also assumed that an additional approximate 25% of the value generated in the LSP and private individual market was generated in corporate environments by employees directly or indirectly responsible for multilingual data processing. This figure is included in the numbers above and should be further confirmed by additional market research.

4.1. Primary Research

The results of the analysis of the data collected through the questionnaire are presented in Appendix XI, page 141. The conclusions will be presented in the relevant sections of the secondary research.

4.2. Secondary Research

As we pointed out in the introduction, revenues generated by European language services in 2008 were estimated at **4.17 billion €** or 43% of the global market (Beninatto & DePalma, 2008). This figure is almost double the value of the turnover generated by language services in the EU-25 in 2005 (2.90 billion €, a market share of 41% out of a global turnover of 7.07 billion €) (EUATC, 2005).

Two studies carried out in 1999 provided estimates of the translation and interpreting market in Europe of 3.75 billion € in 1997 (ASSIM, 2000) and of 1.92 billion € in 1999 (Allied Business Intelligence, cited in EUATC, 2005). The same studies provided the following forecasts for 2004: 4.78 billion € (ASSIM) and 2.5 billion € (Allied Business Intelligence).

When analysing the data quoted above, the considerable fluctuations in the figures become evident. These inconsistencies and inhomogeneities are a constant characteristic permeating all data referring to the language industry, independent of the sector (from translation to language teaching) and of the source (from official statistics published at governmental level to publications issued by professional associations).

One of the main issues identified within the publications collected is related to the limited clarity when describing the data. One of the most evident examples includes the case of interpreters: in many cases, it is not clear whether reports describe the market of translation

and interpreting or translation only. It seems as if "translation" includes "interpreting" in some cases.

Moreover, reports providing figures of the size of the language market rarely clarify whether the freelance market is covered as well.

Consequently, interpretation of data and comparison with findings from other sources becomes arduous and sometimes even pointless.

The same can be said about the sectors of the language industry: the boundaries between one segment and the next are dynamic and not well defined, which – once again – represents a major hurdle when interpreting the data.

The main consequence of the difficulties encountered above is that as the figures provided are approximate then their interpretation is bound to be highly speculative.

During the analysis of the secondary data collected, it became evident that the number of comprehensive studies published by official sources is very limited. Although an abundance of reports is available, only few of them were identified as relevant comprehensive studies.

Nevertheless, based on the multitude of secondary sources consulted as well as the extensive primary research performed, it is felt that the size of the market can be estimated at double the figure above.

4.2.1. Authorities – European and international level

Our secondary research involved first of all a search for data publicly available at international and European level at the following five authorities: Eurostat, the Organisation for Economic Co-operation and Development (OECD), the European business register (EBR), the United Nations Statistics Division and the World Bank. The only useful statistics fully relevant to our study – published by Eurostat – provides the number of students for every European Member State by foreign languages studied (Eurostat, 2009a; Eurostat, 2009b).

We then contacted all five authorities mentioned above in order to enquire whether any data could be provided upon request.

Eurostat pointed out that most of the activities covered by our study are included in the structural business statistics (SBS) data collection publicly available on the Eurostat website. However, they are part of a NACE class together with other activities and it is not possible to distinguish the indicators requested for these activities only. A special mention was made as regards to language teaching and education in general, which are not covered by the SBS data collection. For this sector in particular, we were pointed to the tables about language learning at school, which we had previously retrieved from the website. In addition, we were made aware of data about foreign language learning that will be published in Autumn 2009 (see section "Reports being prepared now", page 83). Our contact within Eurostat also highlighted

that Eurostat is not aware of any other source at European level that would be able to provide the detailed information requested.

The Organisation for Economic Co-operation and Development (OECD) informed us that although a wide range of industry statistics are available, data on businesses operating within the language industry is too specific and therefore cannot be provided. They advised to contact Eurostat.

The European business register (EBR) was not able to produce any statistics at European level either. The contact person of the information department informed us that only a minority of national business registers use a form of classification by activity code. However, none of these registers share their data through the EBR. Only in those countries that require it by law registries can provide information about turnover from the financial data available.

The United Nations Statistics Division informed us that no particular information about the language industry in the European Union is available and they advised to contact Eurostat.

We contacted the World Bank Group's Translation Unit (GSDTR) because of a report published in 2004 about Translation Business Practices. For the purpose of the report, the GSDTR surveyed a number of companies and organizations for the purpose of benchmarking its business practices with the market, with an emphasis on buying rates, language combinations, quality assurance and technology (World Bank Group's Translation Unit, 2004). Although the contact person for the report informed us that the report was one of a kind and that no more recent data was available at the World Bank, they showed considerable interest in knowing the trends in the European language market and expressed their wish to view the results of our study.

4.3. Review of the language industry by sector

The following main sectors of the language industry were reviewed – some of them with sub-sectors – and the volume and value per sector was determined where possible.

4.3.1. Translation and interpretation

According to Allied Business Intelligence (1999, in EUATC, 2005), human translation accounted for 66% of the language market in 1999 and 58% in 2004. We suppose that this proportion has now increased, with a steep increase of the segments of software localisation and website globalisation.

The translation sector is one of the most fragmented in the world (EUATC, 2005) due to the large number of freelancers. In a 2008 Common Sense Advisory survey, the majority of language service providers employed less than five people, suggesting a large proportion of freelancers in the market (DePalma, 2008). This was confirmed by our primary research: out of 700 participants, 43% have no employees at all (and consequently belong to the category of

freelancers or sole proprietors) and 36% have between 1 and 10 employees. Only the remaining 21% of respondents stated that the number of employees is above 10. The complete table of these figures can be viewed in Appendix XI, Figure 52 page 148). This seems to indicate that in an overall climate of market growth within the language industry, the market share of freelancers in relation to translation companies is in the region of 50%.

The main findings obtained during our secondary and primary research are listed below.

4.3.1.1. Market consolidation

According to EUATC there is a trend towards a quick increase of the number and size of translation companies, notably via acquisitions (EUATC, 2006). The increase of market share by big translation companies was stated as one of the main reasons why mergers and acquisitions happen, according to the respondents to our questionnaire. The complete table of answers can be viewed on page 163 in Figure 77 and Figure 78 (Appendix XI).

Consolidation in the translation market through acquisitions of translation companies had been a major development from 1995 until 2005. The combined turnover of the 15 biggest translation companies in the world represents 10% of the world market and 50% of the market for translation companies. (EUATC, 2005).

Market consolidation represents a threat to small businesses and individuals: the high production capacity reached by the big companies cannot be matched. As a consequence, an increased monopolisation of the market can be expected. These issues were confirmed by the participants to our questionnaire in the open-ended questions which can be read on page 166, Appendix XI.

According to Boucau, the growth of big companies is quicker than the growth of the rest of the language market (Boucau, 2009). Therefore, consolidation was estimated to increase in 2005 (EUATC, 2005) and in our opinion will increase further, especially due to the fact that multinational companies increasingly source multilingual service providers offering all languages for a given multilingual project.

4.3.1.2. Entry barriers

Entry barriers are very low for translation companies (EUATC, 2005), which implies that more and more individuals and new companies are trying to enter the market. The constant increase in the number of translation companies is resulting in a situation where supply continuously exceeds demand in terms of number of new start-ups available. The number of well-qualified linguists, however, is too small to cover the growing demand. This directly translates into lower profit margins for the providers and a decrease of the quality of services, partially due to unfair and fierce competition.

These trends were confirmed by the open-ended questions to our questionnaire. The complete list of answers provided can be read on page 166 in Appendix XI.

4.3.1.3. Languages

English is increasingly becoming the international communication language (EUATC, 2005).

The languages and dialects recorded at the UN add up to several hundred with just 60 languages currently being used for translation. EUATC estimated in 2005 that the ratio of what is actually translated compared with what could potentially be translated as 10% (EUATC, 2005).

According to Common Sense Advisory, there are seven languages that will undergo major growth: the so-called hyper-languages of the web (English, French, Italian, German, Spanish, Japanese and Chinese) (DePalma, 2008).

The findings from our questionnaire show that non-European languages represent a significant segment of the total turnover generated. As a matter of fact, out of 684 respondents Asian languages were mentioned by 166 respondents.

We then analysed the frequency with which European languages were mentioned and weighted the findings with the turnover of the business and with the turnover generated by that language. The resulting table confirms English as the clear leader, closely followed by German, French and Spanish (see Figure 55, page 150).

4.3.1.4. Prices

The worldwide survey of translation pricing published by Common Sense Advisory (DePalma, 2008) led to the finding that translation prices have been relatively stable between 2004 and 2008, with the overall fluctuation being less than 10%. An important factor playing a decisive role when it comes to pricing is foreign exchange rates, while prices are not influenced by inflation.

On a European scale, this finding could explain the trend of the growing language industry in Eastern European countries. As a matter of fact, among the 11 non-Euro countries, eight are part of the Eastern Europe market: Bulgaria, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland and Romania. These States can exploit their weak currencies and low salary structure by offering lower prices and hence beating the competition and attracting more clients.

4.3.1.5. Standards

The new standard EN15038 has been introduced in a number of LSPs already (see Appendix XI, heading “Standards”, page 146). However, according to interviews conducted with translators as part of this study, the standard – although well intended – does neither indicate nor reflect the quality of the output of an LSP. Due to downward pressures and trends in pricing, many translation agencies need to operate with limited budgets in order to stay competitive. As a result, if low cost and low quality translation work is performed, the mere

fact that such work is revised does not guarantee high quality. Quite the opposite is the case: Complying with standard EN15038 may mean low quality translation revised to a low standard. Well qualified revisers tend to refuse revising bad translations. Therefore, a poor translation superficially revised can be of considerable lower quality than an unrevised high quality translation. It therefore seems that a modification of the standard is required.

4.3.1.6. Market forecast

In Europe, there were an estimated 1 500 translation companies in 2005 (EUATC, 2005) and their average turnover was in the region of **300 000 €** at the time. This figure corresponds to what was provided by ACT in 2004 for the Spanish market (ACT, 2004). However, due to the highly diverse data provided at secondary research level, calculations of the average turnover per company were not possible at that stage.

According to EUATC, the overall market share of translation *companies* represented approximately 25% of the total revenue of the market in 2006 (EUATC, 2006) but will tend towards 30 to 40% in 2016. The market share of self-employed *freelancers* (working directly with the client) will drop from 75% to 60%, the main cause being the growing number of languages requested for each project (EUATC, 2006). The struggle to survive among freelancers clearly emerged from the responses to the open-ended questions to our questionnaire. The responses provided can be read in Figure 82 and Figure 83, page 181.

Further estimates regarding the future development of the language industry are discussed in section 4.6, page 79.

4.3.1.7. Literary translation

In 2008, the European Council of Literary Translators' Association (CEATL) published a report about comparative incomes of literary translators in Europe. Findings from this report are presented in the single country fact sheets.

The most comprehensive source of information as regards statistics about literary translation is published by UNESCO (2009): the Index Translationum database contains information on the number of books translated in all UNESCO Member States since 1979. Data about all European Member States was extracted and inserted into the country fact sheets.

Index Translationum also provided the base for the 2008 report "Translation Statistics Across Europe" written by Wischenbart (2008). An analysis of the languages of origin of all books shows that English is by far the leading language and the proportion of books translated into English compared to other languages is steadily increasing, as can be viewed in the table below.

	1979	1989	1999	2006
English	51,10%	53,66%	63,96%	60,44%
French	13,79%	12,60%	9,51%	10,73%
German	6,87%	6,52%	7,08%	6,97%
Top 3 languages	**71,76%**	**72,77%**	**80,56%**	**78,14%**
Italian	3,77%	3,78%	3,61%	3,46%
Russian	6,03%	5,19%	1,55%	2,85%
Spanish	1,46%	2,78%	2,70%	2,43%
Swedish	2,99%	2,65%	1,66%	2,06%
Dutch	1,28%	1,31%	1,55%	1,38%
Top 8 languages	**87,30%**	**88,48%**	**91,62%**	**90,32%**

Figure 14 – Ranking of languages of origin for translated books (Wischenbart, 2008, p. 19)

In May 2009, we extracted the number of books translated by original language and the statistics are as follows:

language	Books translated	Share of EU-27 total			
English	1 000 758	62.7%	**Finnish**	6 586	0.4%
French	186 036	11.7%	**Romanian**	5 029	0.3%
German	169 387	10.6%	**Greek**	3 908	0.2%
Italian	55 397	3.5%	**Estonian**	3 894	0.2%
Spanish	43 365	2.7%	**Slovak**	3 727	0.2%
Swedish	30 738	1.9%	**Bulgarian**	3 419	0.2%
Danish	16 222	1.0%	**Slovene**	2 052	0.1%
Dutch	16 050	1.0%	**Lithuanian**	1 801	0.1%
Czech	14 642	0.9%	**Latvian**	1 124	0.1%
Polish	12 279	0.8%	**Irish**	228	0.0%
Hungarian	10 487	0.7%	**Maltese**	21	0.0%
Portuguese	9 581	0.6%			
			Grand Total	**1 596 731**	

Figure 15 – Number of books translated by original language. (UNESCO, 2009)

The figures show that English is still the clearly dominating language, followed by French and German.

The extent to which English is dominant in the single countries shows some significant variations across Europe: the Netherlands emerged as the country with the highest penetration of English (more than 70% of books translated). At the other end of the scale, the Czech Republic turned out to be the country most resistant to English, with the proportion of books translated from English compared to other languages below 60% on average.

Interestingly, an analysis of the *countries* where most books are translated results in France being the leader, closely followed by Germany. This trend was confirmed by *Börsenverein des Deutschen Bundeshandels* for Germany and *Electre* for France (Wischenbart, 2008, p. 17).

4.3.1.8. Conference interpreting

"Conference interpretation deals exclusively with oral communication: rendering a message from one language into another, naturally and fluently, adopting the delivery, tone and convictions of the speaker and speaking in the first person" (DG SCIC, 2005). To allow people from different backgrounds and culture to communicate during meetings of various types, the role of conference interpreters becomes crucial. The main mission of the conference interpreter is to make sure that the message is carried across all languages spoken by the participants without losing the key content and intention of the message.

In order for conference interpreters to carry out their job as much in the background as possible (i.e. without interfering with the execution of the conference), technology plays a vital role. Hence, the technological aspect of conference interpreting will be analysed in further detail in section 4.3.4.10, page 70.

To retrieve information about the sector of conference interpreting, various international and national professional organisations were contacted numerous times. Of the associations contacted, none was able to deliver any statistics or studies about the sector of conference interpreting in their country or in the whole of Europe. The only data we could retrieve was some information about their members provided by the Italian National Association of Conference Interpreters Professionals (ASSOINTERPRETI) and the Spanish Association of Conference Interpreters (AICE).

For example, for Spain we received the following data:

	2005	**2006**	**2007**	**2008**
Spanish/English	4705	4823	5315	4442
Spanish/French	891	803	785	642
Spanish/German	397	399	442	433
Spanish/Italian	176	168	172	132
Spanish/Portuguese	30	62	0	56

Figure 16 – Number of full and half days worked by members. Source: (AICE, 2009)

The total number of members amounted to **68** plus 10 candidates in 2009.

The table confirms that English is still the dominating language (with some fluctuations as regards the total amount of full and half days performed with the combination Spanish-English over the years), followed by French, German, Italian and Portuguese. However, while the language combination Spanish-French has been steadily decreasing, the combination Spanish-German has experienced a slight increase and Spanish-Italian stayed relatively stable over the last four years. The emergence of German among members of AICE in Spain could be

explained by the general trend in Europe towards a growing demand for German, as emerged from our primary research (see 4.3.1.3, page 25).

As regards Italy, the information provided by ASSOINTERPRETI was quite exhaustive. As of March 2009, the association had **140** members plus 15 candidates. The most frequent language combinations are Italian-English, Italian-French, Italian-German and Italian-Spanish, which places Italy right among the other European countries, as found in our primary research and by Common Sense Advisory (see 4.3.1.3, page 25).

As regards additional information about the members, their age ranges between 27 and 65 and the prevalence of individuals are women in their 40's and 50's. In addition, several members are interpreters as well as translators and/or teachers of interpretation. This underlines the difficulties encountered when analysing the interpreting sector: since the sectors of translation and interpreting are closely intertwined, it is difficult to make a clear distinction and – above all – to establish clear turnover figures for both sectors separately.

From the sector study conducted by the Italian revenue agency (see country fact sheet Italy), the total number of interpreters paying taxes in Italy in 2004 amounted to **453**. Assuming that interpreters are likely to perform conference interpreting, one can assume that there is a large number of interpreters not members of any association (which was confirmed by Assointerpreti). This fact objectively leads to a difficulty in estimating the total number of interpreters active in Italy, and the same is true for the rest of Europe.

In order to get a picture of conference interpreting in Europe, we consulted the Association of Professional Conference Interpreters Worldwide (AIIC) since some useful data was available on their website (unfortunately, it was not in a readable format, see Figure 17). When contacted, AIIC was not willing to provide any additional data. We therefore have no means to reliably estimate the size and value of conference interpreting in Europe.

According to the AIIC website, European members account for 61% of the total members (1797 European members versus 2915 worldwide). The main language combinations are (in order of frequency) English, French, Spanish, German and Italian (see Figure 17), which – once again – confirms our findings of the primary research (see 4.3.1.3, page 25).

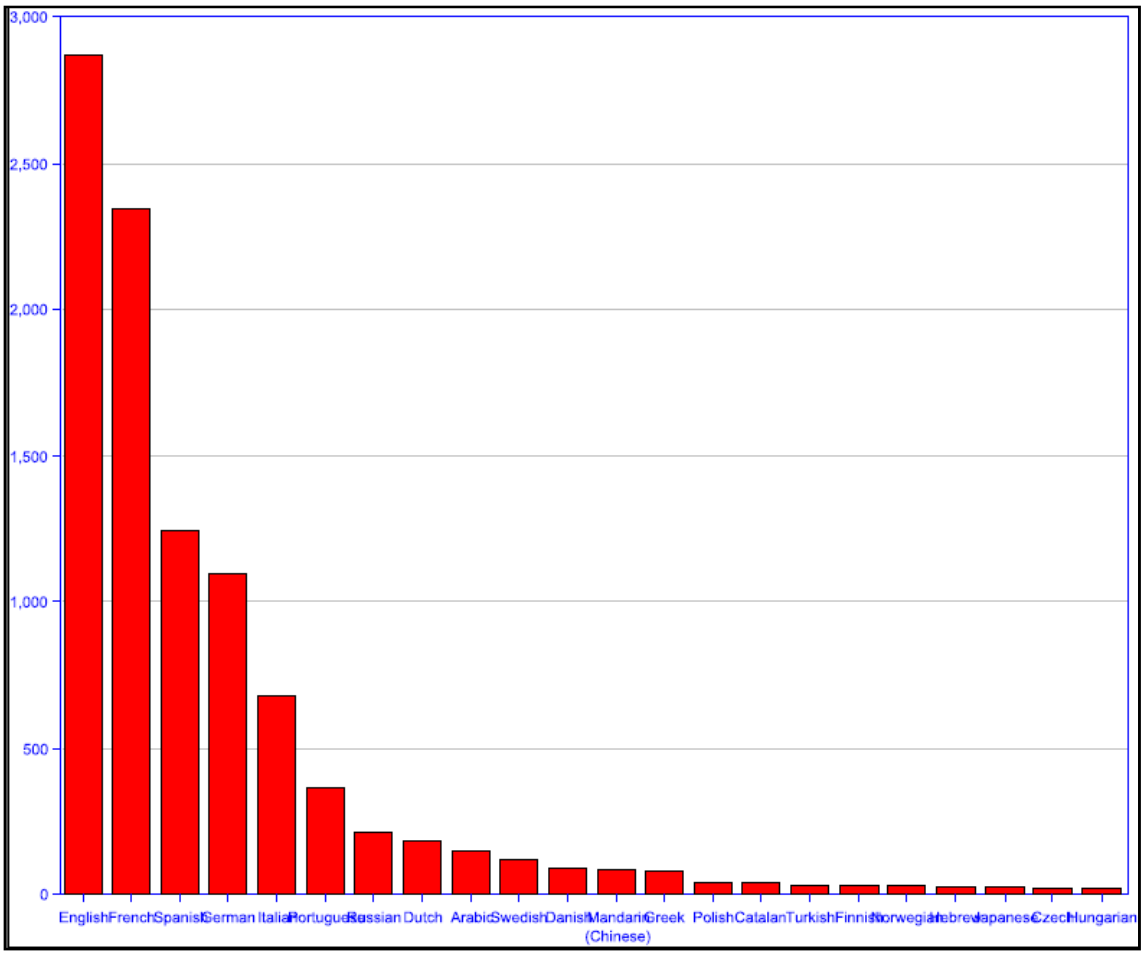

Figure 17 – AIIC Facts and Figures – AIIC interpreters by language. Source: www.aiic.net

According to the data above there are 1797 conference interpreters active in Europe (and part of a professional association). According to ACT less than 15% of translation companies are members of an association (ACT, 2004). If this proportion is applicable to the sector of conference interpreting in the whole of Europe, it can be estimated that in Europe, the total number of conference interpreters reaches 12 000.

Assuming that the conference interpreter work for an average of 100 full days per year at a rate of 350 € per day, the total turnover of conference interpreting in Europe can be estimated at **420 million €.**

According to Assointerpreti, interpreters not part of an association mostly work for the community, Tribunals, the Police, institutions and companies as employees. As a matter of fact, the proportion of interpreting performed for the European institutions is considerable due to the large number of languages involved and hence the strong necessity of multilingual communication. In 2004, the total cost of the Directorate general for Interpretation of the European Commission (DG SCIC) was estimated at 108 million € and the interpreting services of the European Parliament and the European Court of Justice was estimated at 76 million €, amounting to a total of 184 million €. The forecast for 2007-2010 was estimated at **238 million**

€ (DG SCIC, 2005), however it was not specified which additional Member Countries this number includes.

The fact that the DG-SCIC alone estimates costs for interpreting at 238 million € per annum suggests that our estimates of 420 million € are very conservative.

4.3.1.9. Sign language interpreting

Information about sing language interpreting was mostly extracted from the European Forum for sign language interpreters (EFSLI) website, as well as from the book published by de Wit in 2008 about sign language interpreting in Europe (de Wit, 2008). All data about single countries is presented in the country fact sheets.

The British association for Sign Language Interpreters ASLI published a fees and salaries report in the years 2001, 2004 and 2008 (ASLI, 2008). In the most recent edition, the survey was completed by 230 ASLI members. Among the respondents in salaried employment (27%), the average full-time equivalent gross salary resulted at £25 000 and £29 999 in the majority of cases (27%), see the figure below.

	Actuals	%
10,000 to 14,999	3	5%
15,000 to 19,999	8	13%
20,000 to 24,999	12	19%
25,000 to 29,999	**17**	**27%**
30,000 to 34,999	12	19%
35,000 to 39,999	6	10%
40,000 to 44,999	3	5%
45,000 to 49,999	1	2%

Figure 18 – Full-time equivalent gross annual salary. (ASLI, 2008, p. 10).

For respondents in freelance employment (73%), the average taxable profits declared on last tax return lied between £20 000 and £24 999 in 18% of cases (the majority).

In addition, the report contains information about fees and prices. Comprehensive information about fees is collected by de Wit (de Wit, 2008). However, since fees and prices are not the main focus of this report, this information was not inquired any further.

In our questionnaire, we found that in total 29 respondents are offering sign language interpreting services in the European Union and 11 outside the EU (see Figure 46 – Exact services provided, page 145). However, since sign language was not stated as a language option later in the questionnaire, nor were participants asked about the share of turnover

generated by sign language interpreting, no further findings could be retrieved from the primary data collection for this subsector.

4.3.1.10. Telephone interpreting

The need for spoken language services – such as telephone interpreting – is high in the public services of nearly all countries where a large number of languages are spoken, for example because of high levels of immigration (Kelly, Beninatto, & De Palma, 2008a).

The United Kingdom is an excellent example in this matter. According to the Annual Population Survey (APS) conducted in 2007 by the Office for National Statistics (ONS), the following population estimates were given for the top 20 nationalities of people residing in the country:

Rank	Country	Number of residents
1	United Kingdom	56 192 180
2	Poland	392 823
3	Ireland	347 932
4	India	296 462
5	United States	136 826
6	Pakistan	134 787
7	France	116 227
8	South Africa	102 959
9	Australia	102 242
10	Italy	92 907
11	Germany	89 030
12	Portugal	85 181
13	China	78 361
14	Nigeria	78 359
15	Bangladesh	74 082
16	Zimbabwe	71 031
17	Philippines	69 536
18	Spain (Except Canary Islands)	62 532
19	Jamaica	61 136
20	Somalia	60 892

Figure 19 – Top 20 nationalities of UK population. (CILT, 2009)

This wealth of diversity in the population is reflected in a wealth of languages spoken. The ONS estimated that in 2006 over 2 million people spoke a language other than English at

home in the UK[7] and this figure is likely to have increased since. As a direct consequence, the United Kingdom needs to tackle an elevated need for effective multilingual communication.

One example is represented by the British public health system (NHS), offering interpreting services for patients who are not able to communicate in English. Costs involved in interpreting in these cases are elevated because interpreters need to physically be present to intermediate between the patients and the personnel and are paid by the hour even if the actual amount of interpretation is minimal. Another major cost factor is represented by rare languages, where interpreters are equally rare and the costs involved are even higher than for languages more frequently spoken.

These two factors are the correct prerequisites of telephone interpreting, where the notion for "rare" language is relative (Kelly, Beninatto, & De Palma, 2008a) and where the pricing unit could be as little as per minute.

The market for telephone interpreting is global in scope. Users can be both in the private sector (B2C and C2C) and public sector (G2C[8]) and the major areas of need were identified as follows:

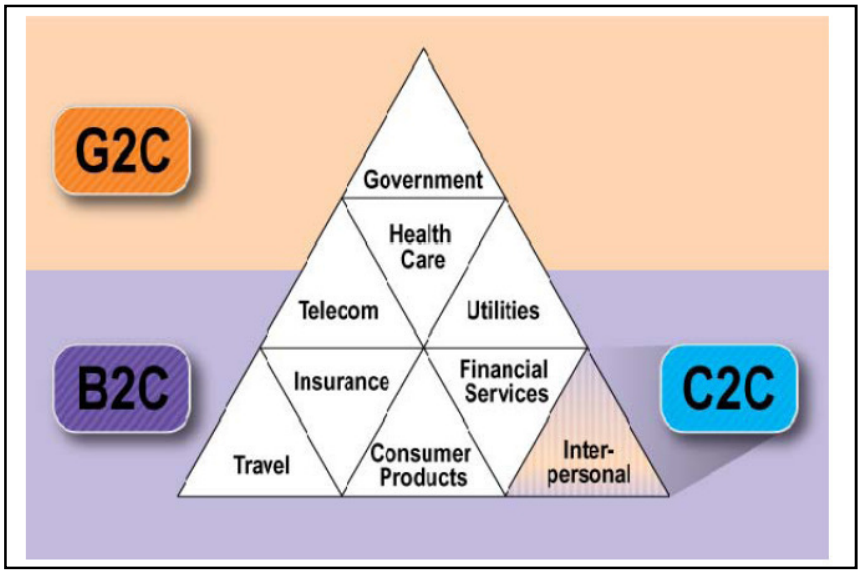

Figure 20 – Major areas of telephone interpretation need. (Kelly, Beninatto, & De Palma, 2008a).

It is estimated that the global revenue for telephone interpretation generated by the top 15 telephone interpretation companies worldwide was worth about **213 million €** (US$ 313 million) in 2007. Out of this number, 15% (or **32 million €**) are based in Europe.

[7] Details about the actual language spoken at home are not collected. However, the ONS have now recognised the demand for information on the linguistic diversity of the UK and in April 2008 they announced that a language question will be included in the Census in 2011 (CILT, 2009)

[8] G2C: Government-to-Consumer; B2C: Business-to-Consumer; C2C: Consumer-to-Consumer

The ranking of the top 15 telephone interpretation companies for 2007 is shown in the figure below. It is important to point out that the revenues listed below represent telephone interpretation revenue alone.

Rank	Company	Country of Headquarters	Telephone Interpretation Revenue in US$M	Status
1	Language Line Services	United States	180.45	Private
2	Manpower Business Solutions	Netherlands	26.57	Public
3	Pacific Interpreters	United States	17.80	Private
4	Cyracom	United States	16.92	Private
5	NetworkOmni	United States	15.00	Private
6	Semantix	Sweden	12.55	Private
7	Language Services Associates	United States	9.51	Private
8	LLE	United States	7.10	Private
9	Telelanguage	United States	6.30	Private
10	CanTalk	Canada	5.10	Private
11	Certified Languages International	United States	5.00	Private
12	thebigword Group	United Kingdom	3.43	Private
13	CTS Language Link	United States	2.80	Private
14	ISM Interprétariat	France	2.29	Private
15	Lionbridge	United States	2.26	Public

Figure 21 – Ranking of top 15 telephone interpretation companies worldwide. (Kelly, Beninatto, & De Palma, 2008b)

Other companies not included in the top 15 but still generating significant revenues in the telephone interpreting industry include Lyric Labs (India), E-C Translation & Localization (China), Tolketjeneste (Norway), and Geslingua (Spain).

The estimate for the global served market for outsourced interpretation services amounts to **1.7 billion €** (US$ 2.5 billion) in 2007. Out of this number, **476 million €** are attributable to telephone interpreting worldwide (Kelly, Beninatto, & De Palma, 2008a), of which 70% is known to be attributable to the United States. It is unknown where the remaining 30% are generated but we think it is safe to assume that half of it is generated in Europe. The resulting revenue for the European telephone interpreting market amounts to an estimated **71 million €** (of which **32 million €** are generated by the top 4 European companies worldwide, as explained above).

In our questionnaire, we found that in total 195 respondents are offering telephone interpreting services in Europe and 44 outside the EU (see Figure 46 – Exact services provided, page 145). However, since participants were not asked about the share of turnover generated by telephone interpreting, no further findings could be retrieved from the primary data collection for this subsector.

Market forecast

According to Common Sense Advisory, the market for telephone interpreting will reach **816 million €** in 2012, which represents an annual growth rate of 14.6% (Kelly, Beninatto, & De Palma, 2008a). Even though a drop in prices is forecasted, it is assumed that the industry of telephone interpreting will still grow.

Multilingual immigrants and long-term residents contribute significant amounts to a nation's economy. According to Kelly et al., more than half the world's immigrants reside in Europe and the U.S (Kelly, Beninatto, & De Palma, 2008a). In a climate of increasing migration and globalisation, we agree that the market for telephone interpretation has the potential to grow and develop considerably within Europe.

As regards the main players of the market, the report pointed out that an increasing number of businesses with a long tradition of translation and localisation activities are moving into the lucrative segment of telephone interpreting. Thebigword, TransPerfect and Lionbrige – three of language service providers among the top 30 language service providers worldwide (see Appendix VII, page 136) – have ventured into telephone interpreting with considerable revenues. One thing that these three companies have in common – and that significantly contributes to their success within the segment of telephone interpreting – is the availability of capital for new investments. As a matter of fact, the barriers to entry are rather high in this sector due to the high costs involved in the upfront investments into technologies (Kelly, Beninatto, & De Palma, 2008a).

Threats

Among the technologies with the potential to substitute telephone interpretation, the following are mentioned by Common Sense Advisory:

- Video interpreting (VI)
- Web-based services (e.g. SpeakLike)
- Machine interpretation
- Computer-assisted interpretation (CAI)

4.3.1.11. Translation and Interpretation at the EU institutions

The EU institutions represent a considerable proportion of the European translation and interpretation market. In this section we will illustrate some key facts, retrieved from the websites of the single institutions unless specified differently.

We assume that a certain proportion of the value of the translation and interpretation market related to the European institutions is partly included in the figures provided throughout our report. The figures below are therefore just reported for acknowledgment but are not

analysed in more detail as they were not part of our study. Any language-related employment within the institutions has not been analysed further or included in any of our statistics.

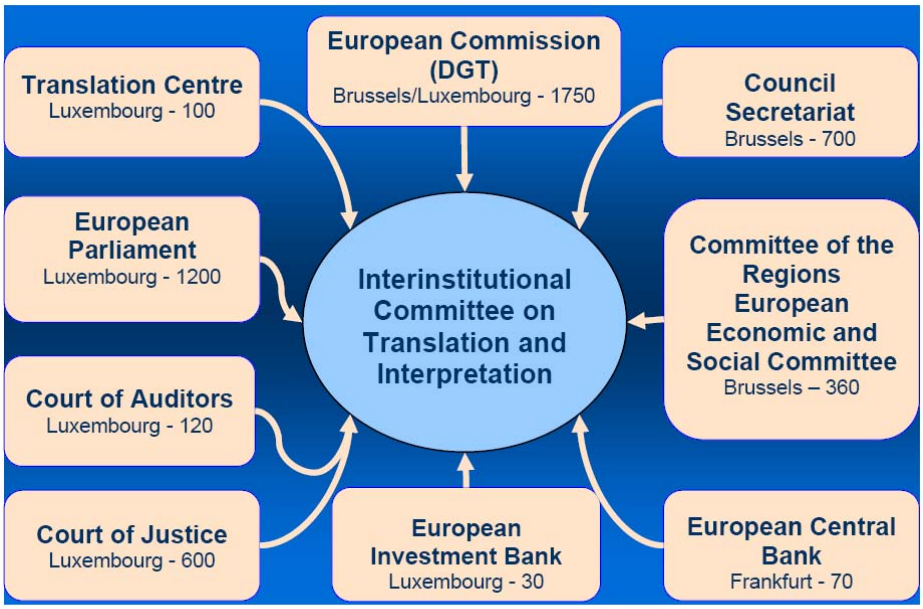

Figure 22 – Number of translators of each EU institution. Number of translators are rounded off and do not include interpreters not lawyer linguists. Source: DGT press pack

The following table shows the number of pages translated at the European Commission between 2000 and 2007

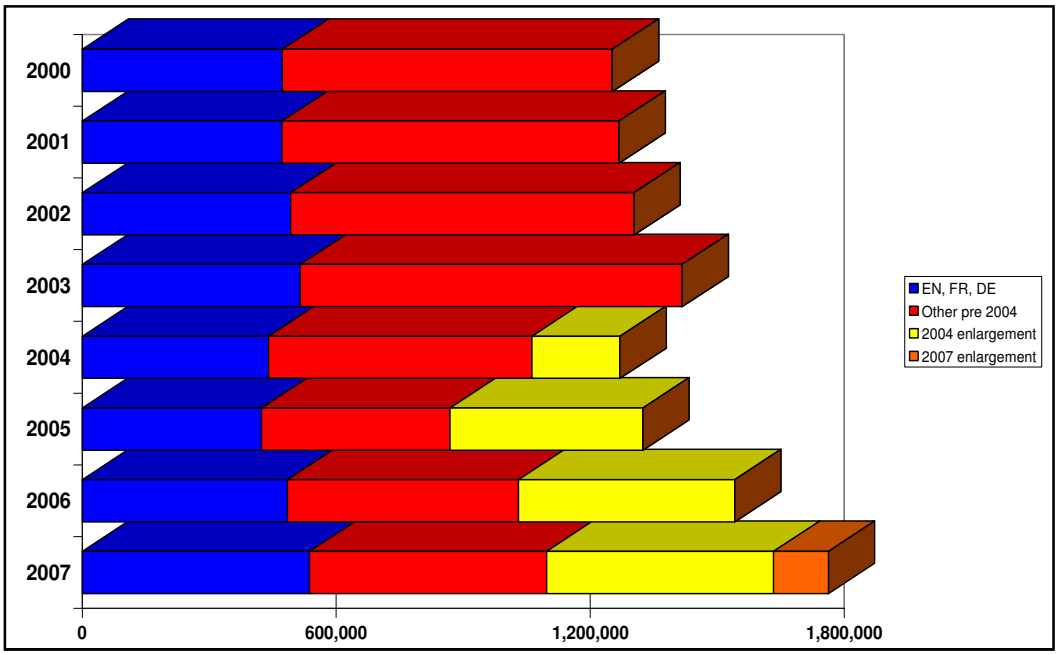

Figure 23 – Number of pages translated at the European Commission. (Majcen, 2008)

The breakdown of the pages translated by proportion of freelance translations, by the source text and by the growth since 1997 is displayed in the table below.

	1997	2004	2007	Average yearly growth (manually calculated)
Total output (pages)	1 125 709	1 270 586	1 762 773	57%
Proportion freelance	16%	23.00%	23.80%	133%
Source text in English	45%	62%	72%	151%
Source text in French	40%	26%	12%	-53%
Source text in German	5%	3.10%	3%	-6%
Source text in other EU languages	8%	9%	13%	154%

Figure 24 – Translation at the European Commission. (Majcen, 2008)

From the data shown above, it becomes evident that some major changes happened between 1997 and 2007: the total number of pages translated has increased by 50%. Out of this number, the proportion of freelance translators has almost tripled, as has the proportion of translations from English. While the number of translations from German are more or less stable (6% decrease), the number of pages translated from French has almost halved. In the meantime, the number of translations with other EU languages as a source language is almost three times as big in 2007 compared to 10 years earlier. This figure can be most probably explained by the languages that have been added as a result of the expansion of the EU.

A detailed breakdown of the pages translated by target language can be viewed in the graph below

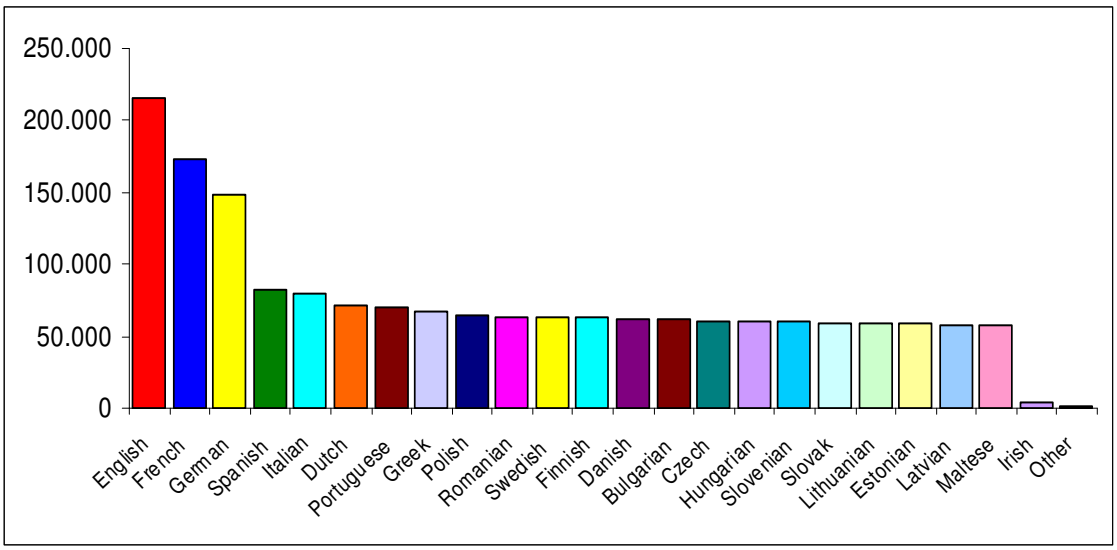

Figure 25 – Pages translated at the European Commission by target language. (Majcen, 2008)

It can be seen from the figure that English, French and German remain the main languages also in the ranking of target languages.

Translation centre (centre de traduction) for the bodies of the European Union

Number of pages translated in 2007: **732 673** (34% increase compared to 2006)

Availability on budget for external translation services for 2007: **13.39 million €**

European Parliament – Directorate General for Interpretation and Conference

Staff interpreters employed: approximately **430**

Freelance interpreters at disposal (auxiliary conference interpreters): **2 500**

Court of Justice – Interpretation Directorate

Permanent interpreters: **70**

External interpreters: **unknown**

European Commission – Directorate General for Interpretation

Staff interpreters: **500**

Accredited freelance interpreters: **2 700**

Total operating cost 2005: **100 million €**

The cost of interpreting is likely to increase by 20-40% when full capacity is reached in the new Member State languages.

European Commission – Directorate General for Translation

DGT's yearly publication concerning expenditure on external contracts with subject translation services: **12.16 million €.**

4.3.2. Subtitling and dubbing

The most comprehensive study available about subtitling and dubbing was conducted in 2007 by the Media Consulting Group in partnership with Peacefulfish on behalf of the Information Society and Media Directorate-General and the Education and Culture Directorate-General of the European Commission (Media Consulting Group / Peacefulfish, 2007). In addition, we retrieved information about the industry by conducting telephone interviews with Mario Paolinelli, president of the Italian Association of Audovisual Script Translators and Adaptors (AIDAC) (AIDAC/Paolinelli, 2009) and the secretary of the Subtitlers' Association (SUBTLE, 2009), United Kingdom. Some additional information was provided by FBO (the media translators' section of the Danish Union of Journalists).

Since subtitlers are technically speaking part of the audiovisual translation sector and dubbing actors are treated as artists, it is very difficult to retrieve concrete estimates about the volume and value of the subtitling and dubbing sector. As a matter of fact, there are very few people whose main activity is just subtitling because of the low revenue generated (SUBTLE, 2009).

Most information retrieved is very discursive and mostly concerned with the discussion of advantages of one technique over the other.

In Europe, there is a split between countries more inclined to subtitling as opposed to dubbing. **Subtitling** is the dominant form of media translation in Scandinavian countries, where dubbing is confined to some television programmes targeted at young children (FBO, 2009) while subtitling is even used in television news programmes in Finland (Education and Culture Directorate, 2007). This advocacy for subtitling can partly be ascribed to the fact that the Scandinavian population accounts for just 4% of the total European population.

In general, a distinction needs to be made between television and cinema. While *subtitling in cinemas* is the clear favourite of the majority of European countries[9] (*dubbing in cinemas* is favoured only by Germany, France, Italy and Spain), this number increases when it comes to television productions, where *dubbing* is preferred by ten member states such as Germany, Austria, Spain, France, Hungary, Italy, the Czech Republic, Slovakia and French-speaking Belgium. The post-production technique of *voiceover* is mainly used in television by Eastern European countries such as Bulgaria, Poland, Latvia and Lithuania. All other countries favour *subtitling* (Media Consulting Group / Peacefulfish, 2007).

None of the techniques described above is adopted by Luxembourg and Malta, where foreign audiovisual material is broadcast in the original language only.

To sum up, the biggest share of the market is represented by Italy, France, Germany and the United Kingdom, accounting for 85% of the market. Within this sub-group, there is a clear preference for dubbing (generating 60% of turnover) (Media Consulting Group / Peacefulfish, 2007).

When it comes to the decision of which technique to adopt for post-processing audiovisual material, finance plays an important role: subtitling represents just 10% of the cost of dubbing. This is the main reason why many small European countries favour subtitling (AIDAC/Paolinelli, 2009).

Nevertheless, according to Paolinelli a dubbed cinema movie generates eight times as much revenue as a movie with subtitles, which more than justifies the augmented expenditure at post-production level (AIDAC/Paolinelli, 2009). In addition, the main motivation behind the inclination for dubbing in countries such as France, Germany and Italy is not of financial nature but the wish to preserve the language and the culture.

However, there is a clear trend in France and Germany (Media Consulting Group / Peacefulfish, 2007) and Italy (AIDAC/Paolinelli, 2009) towards an increased use of subtitling.

[9] The European countries subject of the study conducted by the Media Consulting Group in partnership with Peacefulfish comprised the 27 EU Member States in addition to Iceland, Liechtenstein, Norway and Switzerland.

According to Paolinelli, subtitling is an emerging market in Italy and is still in an "experimental" phase and hence highly unregulated.

In general, supporters of subtitling claim that watching subtitled programmes can be used as a language learning tool and should therefore be encouraged (Education and Culture Directorate, 2007). In addition, subtitling should be considered more often as a choice in view of the ever expanding digitalisation of TV, broader reach of satellite programmes and consequent broadcast in more and more countries (AIDAC/Paolinelli, 2009).

Even though the High Level Group for Multilingualism claims that there is a shortage of subtitling translators in Europe, both AIDAC and SUBTLE raised the issue of poor conditions for subtitling translators in Europe, mainly due to the following issues:

- The rise of peer-to-peer style sites where whole videos – or just parts of them – are subtitled by other users for free,
- The low recognition of the profession among the general public but even some professional associations for translation and interpreting.
- Outsourcing is a big threat. Many projects are outsourced to Asian countries (e.g. China, India and the Philippines) because of very competitive prices. In Denmark, subtitling for television is often outsourced to the United States for the same reason (FBO, 2009). However, this often represents a danger to the quality of the work performed.
- Piracy: a large amount of audiovisual material is illegal. This represents a damage to the subtitling and dubbing industry as well.
- Copyright issues: according to the Berne International Convention stipulated in 1979 (Media Consulting Group / Peacefulfish, 2007), translators should be treated as authors. However, according to SUBTLE it often occurs that subtitlers' work is not credited.
- Unfavourable exchange rates have an impact on the sector. As an example, subtitlers in Denmark are paid less because they are paid in devaluated foreign currency (FBO, 2009).
- CAT software is increasingly used for subtitles because of the lower costs involved. However, this represents a heavy drawback in terms of quality since spoken language is not suitable for automated translation (FBO, 2009).

Quality is an issue in general when it comes to subtitling: there is no standardisation system to ensure quality in subtitles (Media Consulting Group / Peacefulfish, 2007). Moreover, stronger regulations are required to protect and preserve the profession. Right now, regulations are weak and scattered: Germany has a clearly legalised framework for dubbing actors (Media

Consulting Group / Peacefulfish, 2007), as do Italy (AIDAC/Paolinelli, 2009) and France with its national centre for cinematography (*Centre national de la cinématographie*)[10]. The subtitling sector is protected in Scandinavia through trade unions (SUBTLE, 2009). However, stronger regulations and protection is required at high level.

The market for subtitling and dubbing was estimated between 372 million € and 465 million € in 2006, with an estimated volume of **408 320 hours per year** (Media Consulting Group / Peacefulfish, 2007). If our modest 10% growth rate of the translation and interpreting sector was applicable to the subtitling and dubbing sector, the market for subtitling and dubbing would reach between **450 and 563 million €** in 2008 according to the 2007 study with an average of 506 million €.

One finding that distinctly emerged from all sources analysed is that the sector strongly needs regulations on a European level. The European Media Mundus programme[11] – involving a 15 million € investment from 2011 to 2013 – is a step into the right direction (AIDAC/Paolinelli, 2009). It is of paramount importance that quality levels are established and maintained through normalization of professional practices, standardization and quality labelling (Media Consulting Group / Peacefulfish, 2007) Moreover, the market needs to be supported through an incentive to circulate audiovisual material all over Europe (AIDAC/Paolinelli, 2009). These are the main prerequisites to sustaining and developing multilingualism in Europe.

4.3.3. Software localisation and website globalisation

Localization isn't just about delivering content to a specific audience, preserving market share, and defending and growing revenues. If organisations need localised software in order to conduct their operational day-to-day business, they are likely to place high importance on this software to be properly localised. Poor localisation is usually not reported back to the software developer, but seriously impacts on the customer experience in a negative way. Organizations that focus on localization stand to benefit from:

- Reduced exposure to fines because of compliance – As described in the revenue and market share models, organizations that lack optimal localization processes are ill-prepared to grow market share and defend revenue. But another important benefit of localization is that it can protect organizations from legal exposure due to failed compliance. How? Localization processes ensure that organizations review and vet content prior to release by standardizing translation and launch workflows and management.

- Improved Customer Experience – An optimal localization process accounts for local market nuances, target group expectations, and brand commitments. As a result, the

[10] http://www.cnc.fr

[11] http://ec.europa.eu/information_society/media/mundus/index_en.htm

content delivered to the various touch points – web sites, kiosks, branch offices and POS systems – meets customer expectations and improves their overall experience. On the flip side, organizations with ad-hoc localization processes fail to account for market demands and deliver poorly translated content which results in inconsistent experiences.

- Improved Branding / Consistency – One of the biggest challenges for global marketers is delivering local content while maintaining the overall brand image and perceptions. Too often corporate marketers find that the brand that costs millions to build and preserve is diluted when it travels to different geographies. Marketers are challenged to preserve the language, perceptions, values, and even tone of voice of the brand. Systems and processes that support localization help marketers overcome these challenges by delivering tools and business processes to effectively translate content, ensure the consistency of value propositions and reuse digital brand images across all geographies.

In a market research exercise by Forrester Research Inc. and published on December 7, 2007 (Forrester Consulting, 2007), 6 large corporations were interviewed and resulted in an optimal versus suboptimal revenue gap over three years totalling US$ 4.715 million. Although the study may be considered biased as it was commissioned by SDL, it is nevertheless valuable to compare the commercial difference.

It was also stipulated that the use of SDL technology in an optimised localisation process (and we can safely assume that the same would apply for optimised localisation processes using other types of tools) resulted in external cost savings of US$ 8 419 475 over three years. Internal cost savings were estimated at US$ 900 000 over three years. Altogether, Forrester calculated a three-year risk-adjusted ROI of 297% for the composite organization with a payback period of 14 months.

The composite organization as extracted by Forrester has the following characteristics:

- 50,000 employees globally
- Global revenues of US$ 21.2 billion
- Regional revenues: US$ 7.8 billion in North America, US$ 13.4 billion outside North America
- 20% market share (across multiple product segments and product lines), in North America, 19% market share outside North America
- 6% year-on-year growth in North America and outside North America.
- Selling directly but also through distributors.

- Currently operating in 20 countries, in 12 languages, with plans to expand into 3-5 new languages per year over the next three years.
- Four staff managing translation process with multiple vendors.

It should, however be noted that localisation needs to be addressed in a highly informed way: Not every area in a website or a software product requires localisation. It is important to analyse thoroughly where localisation has the highest positive impact.

The figures have been included in the estimated size and forecasts for the translation and interpreting sector and seem to correspond to approximately 25% of the translation activities based on the answers received to our questionnaire.

4.3.4. Language technology tool development

Language technology is often called human language technology (HLT) or **natural language processing** (NLP) and consists of computational linguistics (or CL) and speech technology as its core but also includes many application oriented aspects of them. Language technology is closely connected to computer science and general linguistics. In the context of this study we will focus on multilingual technology applications. An explicit evaluation of speech technology will be excluded. This is in principle relevant when examining language training systems and electronic dictionaries which provide speech output for pronunciation exercises.

The total value of the segment of language technology tool development was estimated at 10% of the overall translation market, as explained in the introduction of Section 4, page 20.

The following trends can be observed:

First if all we need to distinguish between “independent” language technology software vendors (focussing on nothing but language technology development) and LSPs building and selling software. When SDL acquired Idiom World Server in 2008, LSPs and LSDs lost an important alternative to SDL technology and through this acquisition found themselves to have become SDL customers involuntarily. Amongst the independent vendors are Across, MultiCorpora and Kilgray. Nevertheless, some LSPs like McElroy and text & form decided to build their own in-house tools while others such as CrossGap entered the commercial market with their existing solutions. Lionbridge announced that it would open freeway to freelancers and, ultimately, to other language service providers.

For more information about the dichotomy between independent and LSP software vendors and how these two categories are seen by potential tools buyers in the language industry, see (Sargent, 2009).

In addition to commercial software, open source technology, including commercial open source solutions, are gaining importance. Non-proprietary language projects, including FOLT, GlobalSight, Okapi, OmegaT, Project Open, and TinyTM need to be watched in the future.

Finally, Google is developing not only statistics based multilingual machine translation, the company has also launched its Translation Center including an easy-to-use editor for post-editing automatic translations, concordance facilities, translation memories, multilingual glossaries and translator collaboration features, with the objective of attracting more attention to the company rather than selling to the language industry.

A study carried out in 2007, Technolangue, consists of the update of a study carried out first in 2003 involving the 13 countries of the European Union (Germany, Austria, Belgium, Denmark, Spain, Finland, France, Greece, Ireland, Italy, the Netherlands, the United Kingdom, Sweden) and its extension to the 12 other member countries, 10 new members having joined in 2004 (Cyprus, Estonia, Hungary, Latvia, Lithuania, Luxembourg, Malta, Poland, Portugal, the Czech Republic, Slovakia, Slovenia).

According to this study, the language technologies market in the 25-countries European Union zone evolved from 610 million € in 2004 to 628 million € in 2005 and should attain 774 million euros in 2010. We assume that the two countries that have meanwhile joined the EU (Romania and Bulgaria) will result in a small increase of the above estimate. Our own research results are based on the assumption that language service providers invest between 5-10% of their turnover in multilingual technology tools. This is likely because speed, cost and quality of language services are increasingly dependent on the use of up to date multilingual technology.

Based on our estimate of the value of the language industry in 2008 of 8.3 billion € – including an estimated 25% of linguists and staff directly related to multilingual production – employed in government authorities, international organisations, the EU and European industry, **we have calculated the value of the multilingual technology tools market at 567.5 million € in 2008**. As the majority of the tools listed below are translation/localisation related, we calculated the value as 10% of these sectors only. Although it is difficult to predict the future of the European economy at this time (due to the credit crunch), we believe that the language industry will continue to grow at an average of 10% per annum to 10.1 billion € in 2010 and 16.3 billion € in 2015. Accordingly, **we estimate the size of the multilingual technology market to grow to 687 million and 1.1 billion € in 2010 and 2015, respectively.**

This tendency has been supported by European funding: In the 6th Framework Program, the European Union spent 135 million € on multi-modal interfaces and language technology, i.e. roughly 15 million € per year on language technology (Lazzari, 2006). The European Commission understood early on that language technology is an economic, political and cultural necessity in Europe. Breaking the language barrier would boost communication and the economy. HLT is already the focus of considerable European research effort, the strategic importance of the technology to Europe has resulted a much higher priority on the research agenda.

For the European Union, with its 23 official languages and many more spoken languages, the availability of fast, reliable and cheap translation is a necessity, and translation technology should be considered as strategically important.

Due to the need for machine translation and spoken language translation in Europe, there are favourable market conditions for companies that plan to offer translation technology and services. Several strong European research groups can serve as suppliers for translation technology. Beyond the European market, the demand for machine translation will be high in Japan, China and Korea as well as in India.

In an effort to co-ordinate needs, initiatives, research and development of language technologies and resources, the EU is funding a network of excellence called FlaReNet, and about to fund a network of excellence within the 7th Framework funding portfolio. Also, the budget for multilingual technologies, services and applications was increased to a total budget of 40 million € in 2009 alone, with an emphasis on multilingual web solutions and innovative computer-assisted multilingual services.

The following types of tools were included in our primary and secondary research:

4.3.4.1. Controlled language tools

ASD Simplified Technical English (ASD-STE100), formerly known as AECMA Simplified English, is an international specification for writing aerospace and defence documentation. The use of this specification is mandatory for many commercial and military projects worldwide. S1000D and ATA iSpec 2200 require the use of ASD Simplified Technical English for any documentation in English.

English is the official language for technical documentation in the aerospace and defence industries. However, many end-users are easily confused by complex sentence structures and by the number of different meanings and synonyms of English words. This applies especially to the many end-users who are not native English speakers.

As a result of joint efforts of AECMA (European Association for Aerospace Industries) and AIA (Aerospace Industries Association of America), the first issue of a controlled language for the aerospace and defence industries was released in 1986, entitled: AECMA Simplified Technical English, PSC-85-16598 "A Guide for the Preparation of Aircraft Maintenance Documentation in the International Aerospace Maintenance Language".

In 2004, AECMA merged with EDIG (European Defence Industries Group) and EUROSPACE (Association of the European Space Industry) to form ASD, the Aerospace and Defence Industries Association of Europe. As a result, AECMA Simplified English was renamed to ASD Simplified Technical English. It also became an official Specification: ASD-STE100. In 2007, ASD-STE100 received the European Community Trade Mark No. 004901195. Since its first release in 1986 several changes, issues and revisions were released up to the present Issue 4

(2007), entitled: ASD SIMPLIFIED TECHNICAL ENGLISH, Specification ASD-STE100, European Community Trade Mark No. 004901195 "International specification for the preparation of maintenance documentation in a controlled language".

ASD Simplified Technical English is characterized by a defined grammar and syntax rules, and a limited vocabulary. Today the standard is maintained by ASD and AIA members, which include companies such as British Aerospace, Airbus, Aermacchi, The Boeing Company, Lockheed Martin, Rolls-Royce, EADS, Dassault and Saab Aerosystems.

These strategies are increasingly adopted by additional document intensive industries. The definition is therefore extended as follows: controlled language is a specially simplified version of a language which is adopted (typically by a company or a documentation section of a company) as a partial solution to a perceived communication problem. Both the vocabulary and the syntactic structures may be restricted.

A number of software tools are available on the market to support the above requirements. In order to control the quality of technical and other texts, the tools examine spelling and punctuation, consistent use of (client specific) terminology and abbreviations. Semantic checking is aimed at avoiding ambiguity, and grammar/syntax/style proofing may be included. These tools have a significant impact on the quality of the output generated. Whilst they are useful in their own right standardising language, they are of particular relevance as a step preceding computer-assisted translation, especially when multilingual output is required. They were developed as a result of efforts aiming at reducing the volume and increasing the precision of important content

At European level, two companies develop and distribute systems, they are located in Germany and the Netherlands.

Acrocheck, developed by a company called Acrolinx can be considered global market leader of controlled language technology. Located in Berlin and Switzerland, they currently have approximately 50 corporate clients and approximately 8000 licenses installed. Acrocheck supports the English, German, French and Japanese languages and a variety of industries. Acrolinx is a technology company focussed on this software niche. Another tool is CLAT, which was developed at Saarbruecken University and never resulted in a spin-off company being created. Existing customers are supported, but the tool is not developed further.

HyperSTE was developed and is marketed by Tedopres in the Netherlands. It is based on the Boeing Checker and focussed on the industries that introduced AECMA/AST.

In New York, Smart Communications developed the MAXit checker tool. Like Hyper STE it supports the English language only and is focussed on ASD Simplified Technical English.

The current market for controlled language tools is estimated by Acrolinx at 7 to 10 million € worldwide. This is relatively small as this type of tools is relatively new, especially outside the

Aerospace industry. Acrolinx' turnover in 2008 was 3 million €, and growing to an estimated 4 million € in 2009. According to Acrolinx, the cumulated growth rate of the market is expected to be about 30% in the next couple of years rising to a market worth around 10 to 14 million €. A lot depends on more awareness being created in senior management of the potential savings that can be achieved with controlled language tools resulting in more interest in buying these tools. There seems to be a tendency for related departments in companies already deploying Acrocheck to also start using the same technology.

In our primary research, 562 respondents out of a total of 1103 valid responses refer to language technology tools, 18 respondents confirmed their use of controlled language tools, which corresponds to 3.20% of the total responses on tools and 1.63% of all valid responses. Some misunderstood the question and mentioned MS Office Proofing tools and other quality assurance tools. The only genuine controlled language tool mentioned (twice) was Acrolinx (see Appendix XI, page 156). This confirms their position as market leaders in a dedicated small niche within the language industry and also shows that understandably the practical use of tools applicable during the document creation stage is fairly low in the multilingual production sector.

4.3.4.2. Terminology tools (professional tools)

A fair number of terminology tools are available for professional use. Some are standalone products, some of these integrate with other systems, and many are offered as part of more comprehensive translator workbench type solutions. They enable greater consistency across a wide array of content and production teams. The ability to embed this language control into the production process ensures accuracy while accelerating times, a key issue in the on-demand world (HLTp. 47). A major example is IATE (**I**nter **A**ctive **T**erminology for **E**urope), an inter-institutional terminology database, which combines the terminological data of all European institutions and bodies, amounting to over 8 million terms and 500 000 abbreviations. Its data covers all official languages of the EU, as well as Latin. Development and maintenance of the database is the responsibility of an inter-institutional team. However, the database is fed by the language departments themselves. Every translator has the right to insert entries into the database. The quality of the content of the database is ensured via a multistage validation system. (Europa-Languages and Europe-Translation Bookshelf-Tools and Workflow).

A large number of terminology tools is available, developed and maintained by large and small players. For more detailed information, please consult Hutchin's Compendium of Translation Software (Hutchins, 2009).

One subset worthwhile mentioning in this category are terminology extraction tools. Term extraction can be either monolingual or bilingual. Monolingual term extraction attempts to analyze a text or corpus in order to identify candidate terms, while bilingual term extraction analyzes existing source texts along with their translations in an attempt to identify potential

terms and their equivalents. Although the initial extraction attempt is performed by a computer program, the resulting list of candidates must be verified by a human terminologist or translator. Therefore, the process of term extraction is computer-aided rather than fully automatic.

There are two main approaches to term extraction: linguistic and statistical. Term extraction tools using a linguistic approach typically attempt to identify word combinations that match certain part-of-speech patterns (e.g., "adjective+noun" or "noun+noun"). Obviously the linguistic approach is heavily language-dependent because term formation patterns differ from language to language. Consequently, term extraction tools that use a linguistic approach are generally designed to work in a single language (or closely related languages) and cannot easily be extended to work with other languages.

Term extraction tools using a statistical approach basically look for repeated sequences of lexical items. Often the frequency threshold, which refers to the number of times that a word or a sequence of words must be repeated to be considered a candidate term, can be specified by the user. The major strength of the statistical approach is its language-independence. However, the amount of "noise" (i.e., the number of unlikely terms) and "silence" (i.e., the number of terms that are not identified) is relatively high. Therefore, often aspects of both approaches are combined into hybrid term extraction tools[12] .

These tools use sophisticated statistical and linguistic algorithms to extract key terms from running text. They are usually sold as part or add-on to other linguistic tools. To mention just a few included in the offerings of developers with very different focuses: Acrolinx offers Term Harvester, Alchemy has a component dealing with term extraction and tagging, Yahoo offers a term extraction service, TermExtract is part of SDL Trados Multiterm and Deja-Vu has a "Create lexicon" function, to name just a few. The machine translation application "Promt" also has a term extractor.

Although a large variety of terminology tools is available and although the majority of companies within the localization industry do engage in terminology work, the tools used and the results are often basic, unreliable and lack the required level of sophistication. Many authors consider terminology work to be a part of the localization process rather than a core part of the content creation process. This leads to imbalances in who carries out terminology work and problems in implementing systematic processes for the management of terminology. Many companies still use spreadsheets for their terminological data gathering and exchange needs, a factor that severely limits the precision of data that can be represented. It seems that most current terminology management systems within organizations will not be able to support the anticipated needs of on-demand translation, and that solutions will need to grow in sophistication to meet future needs. Those actively working with terminology management often understand the benefits of terminology management

[12] http://ecolore.leeds.ac.uk/xml/materials/overview/tools/term_extraction.xml?lang=en

very well, but have trouble in making this value understood by upper management and by their clients. In many cases buyers do not see terminology information as a deliverable and are not willing to pay for it.

LSPs therefore need to factor the cost of buying and maintaining terminology tools as well as the human effort required to populate them into their overall translation / localisation fees. In a small survey conducted by LISA in 2004 (LISA, 2004), half of the total of 81 respondents spent less than 200 hours a year on terminology work. This tendency is likely to improve as can be seen in the increasing popularity of controlled language tools which systematically take care of key terms already at the document creation stage, kick-starting a process that is more likely to result in systematic multilingual terminology management once the source terms are available. The fact that search engines list websites according to certain priorities, which involve defining key terms and repeating them systematically as well as ad words bought to increase visibility on the Internet also contributes to increased awareness of terminology work and tools. Finally, translation and localisation project increase in size with ever narrower deadlines imposed, which requires teams of translators to collaborate on the same files, sets of files and projects. The use of terminology tools shared within a team is mandatory in such contexts in order to ensure decent quality.

As most terminology tools are part of a more comprehensive solution such as translation workbenches and machine translation systems, market estimates for these tools need to be seen in a wider context.

In our primary research, 562 respondents out of a total of 1103 valid responses refer to language technology tools, 306 respondents confirmed their use of terminology tools, which corresponds to 27.74% of the total responses on tools and 54.45% of all valid responses. SDL Trados Multiterm is still the clear market leader and was mentioned by 232 respondents, followed by Wordfast (19), SDLX (14), Across (13) and Deja Vu (11). 104 respondents use terminology tools developed in-house, and this most probably means the use of simple spreadsheets. For more detailed statistical information please see (see Appendix XI, page 154).

4.3.4.3. Electronic dictionaries (consumer tools)

An electronic dictionary is a small handheld computer with integrated reference materials. A variety of dictionaries is available commercially for personal use, some even with speech output, claiming to facilitate communication for tourists or usable for any kind of personal interaction between persons not sharing the same language.

Another variant for professional use is the machine readable dictionary: a machine-readable version of a standard dictionary, organised alphabetically. There is a wide range of electronic (talking) dictionaries available, and it would exceed the scope of this study to list and evaluate them all. Every reputable dictionary publisher now has electronic versions of their previous

paper based publications, and there are many low cost, low end products available for tourists.

In our primary research, 562 respondents out of a total of 1103 valid responses refer to language technology tools, 290 respondents confirmed their use of a multitude of electronic dictionaries, which corresponds to 26.29% of the total responses on tools and 51.6% of all valid responses. For more detailed information on the tools used please refer to Appendix XI, page 157.

4.3.4.4. Translation memory tools (TM)

Translation memory tools usually consist of alignment tools and bilingual or multilingual databases, storing information by segments. The technology allows for batch and interactive translation, and the user interface displays various types of total and fuzzy matches. TM remains the leading technology in terms of efficient production. TM via the web allows multiple translators to work simultaneously on a single project, leveraging the work done by each instantly to improve the collective performance. (HLTp. 47). It drives down costs and improves quality, especially the consistency of translations, which is important, for example in technical and legal fields (HLTp. 22).

(LISA, 2004) conducted an important study on translation memory tools online from August through October 2004. With responses from more than 270 companies, results indicated an expanding TM market, with many companies increasing TM usage as a strategy to reduce costs and improve time-to-market. The survey addressed translation volumes, TM usage rates, TM repository sizes, tools choice, the role of standards and future trends in TM implementation.

Significant findings were the following:

- The majority of companies are planning to extend their use of TM technology
- The majority of those using TM tools use it for at least half of their localization needs
- Companies with relatively low annual localization requirements use TM tools for significantly more of their content than do those with comparatively large localization requirements
- Typical TM repositories contain 300 000–370 000 segments, but users report repositories with as few as 2 000 and as many as 100 000 000 segments
- Although dominated by a few products, the TM market remains highly competitive with many niche, as well as general, TM tools in use. The most widely used TM tools were TRADOS, followed by SDLX, Deja Vu and Alchemy Catalyst

- Users of internally-developed TM systems have the largest TM repositories, averaging five times more TM data than those using commercial tools

Our own research in 2009 shows that the above trend has continued. More TM tools have hit the market, and they are increasingly embedded in more comprehensive solutions. 562 respondents out of a total of 1103 valid responses refer to language technology tools, 409 respondents confirmed their use of TM tools, which corresponds to 87.19% of the total responses on tools and 44.42% of all valid responses. SDL Trados is still the clear market leader and was mentioned by 565 respondents, followed by Wordfast (82), SDLX (63), Star Transit (61) and Deja Vu (37), closely followed by Across (35) and Idiom World Server (28). 73 respondents use TM tools developed in-house. For more detailed statistical information please see Appendix XI, page153.

4.3.4.5. Localisation tools

These are tools which facilitate the localisation of software user interfaces. Three dedicated localisation products are worthwhile mentioning:

Alchemy Catalyst, originally developed within the COREL localisation department, Dublin, as COREL Catalyst, renamed Alchemy Catalyst after a management buyout and formation of the Irish SME Alchemy, which was recently acquired by translations.com, a US based large LSP. **Passolo** was developed by the company with the same name based in Bonn, Germany, and recently acquired by SDL, and finally **Multilizer**, a Finnish product.

In our primary research, 562 respondents out of a total of 1103 valid responses refer to language technology tools, 149 respondents confirmed their use of localisaiton tools, which corresponds to 13.51% of the total responses on tools and 26.51% of all valid responses. SDL Passolo is the market leader and was mentioned by 57 respondents, followed by Alchemy Catalyst (54), SDL Trados (32), Microsoft Localisation Studio (17) and RC Wintrans (8). 104 respondents use terminology tools developed in-house, and this most probably means the use of simple spreadsheets. For more detailed statistical information please refer to Appendix XI, page 155. It should be noted that quite a number of localisers seem to use translation memory tools for localisation rather than dedicated localisation tools. This may be due to the interface natural language strings being delivered by developers in a format that cannot be fed into localisation tools and are processed with translation memory tools instead.

4.3.4.6. Machine translation systems

There are two fundamentally different approaches to machine translation. The earlier, rule based approach relies heavily on linguistic methods and the explicit coding of human knowledge, while the later one is very much data driven and exploits variants of statistical methods which have proven to be successful in the speech recognition field (HLTp. 49). From these two approaches hybrid solutions, combining rule based and statistical methods, are now emerging. MT is being used as a raw translation input to the human translation in order to

improve efficiency. In the European Union, raw translations are being used as a means to facilitate internal communication. The main advantage of MT lies in the rapid translation of texts that need to be understood for some purpose of work and where the translation cost or time prohibits the use of other methods (HLTp. 44-45). MT and spoken language translation can be expected to have a beneficial effect on both price and quality of human translation. (HLTp. 22).

Our primary research shows that the use of machine translation in multilingual workflows is still low. 562 respondents out of a total of 1103 valid responses refer to language technology tools, but only 36 respondents mention machine translation, which corresponds to 3.26% of the total responses on tools and 6.41% of all valid responses. Systran was mentioned by 9 respondents, followed by Google Translate (8), Babylon (3), Language Weaver (3) and Lucy Software (2). Although 14 respondents stated that they develop machine translation systems in-house, this figure needs to be seen with caution. What these respondents probably mean is the development of user dictionaries in-house. For more detailed statistical information please refer to Appendix XI, page 157.

As we predict the use of machine translation to grow substantially in the next few years due to ever and exponentially rising translation needs in increasingly globalised contexts, and embedded in multilingual workflows, we have included detailed information about machine translation below.

Four types of translation demand need to be distinguished:

1. The demand for translations of high, publishable quality. In this case, MT systems generally produce output which must be revised by human translators. Alternatively, the input text may be “controlled” in vocabulary and sentence structure so that the MT system produces few errors that have to be corrected.

2. The demand for translations of a lower level of quality and style, usually intended for users who need to understand the essential content of a document. In this case, MT systems work very well since for this kind of users, some translation, although poor, is better than no translation at all.

3. The demand for translations between participants in one-to-one communication, for instance by email. The possibility of human translation is out of the question in this context, therefore, MT systems are more suitable however poor the input. The development of systems for spoken language translation is currently being the focus of much research.

4. The demand for translations within multilingual systems of information retrieval, information extraction, database access, etc. This field is the focus of a number of projects in Europe that have the aim of widening access for all members of the EU to sources of data and information whatever the source language.

At the beginning and for years, the MT systems were based on direct translation via bilingual dictionaries and with little analysis of syntactic structures but new and more sophisticated approaches have been made due to the advances in computational linguistics. As Hutchins (2004) states, the available systems can be classified as follows:

- Direct
- Indirect: interlingual and transfer
- Data driven machine translation: example based (EBMT) and statistics based (SBMT)

The direct systems do a word-for-word translation by using bilingual dictionaries, with unfortunately very poor results on running texts most of the time.

Indirect systems analyse the source text into abstract representations of sentence structure and meaning and involve different programs to identify the morphology, syntax and semantics of the text. There are two basic indirect approaches, namely, interlingua and transfer machine translation systems.

In interlingua systems, the abstract representation is designed to be a kind of language-independent "interlingua" that can serve as an intermediary between a large number of natural languages. The translation consists of two steps: from the source language into the interlingua and from the interlingua into multiple target languages.

Transfer systems are focussed on correct syntactic transfer of sentences, and they use three basic stages, that are, syntactic analysis of the input text into an abstract source representation, transfer to an abstract syntactic target representation and generation of the output in the target language.

According to Van Der Meer, the differences in approach are determined by the level of analysis that is done purely on the source language and, in that way, a direct MT system is limited to rules that only deal with the transmission of one source language into another specific language whereas indirect MT systems analyse the source language independently of the target language by looking at morphology, syntax and semantics.

Such analysis is based on a 'parsing' of the source language sentence, therefore, transfer systems have a modular set up that consists of the analysis of the source language sentence, the transfer of the linguistic structure and the generation of the target language sentence.

From the 1980s onwards the MT systems requiring a language-dependent transfer temporarily lost their appeal because a dedicated set of rules would be required for each new language pair. This led to the definition of the N^2 problem (N = language) which means that, for instance, with the expansion of the EU to 20 languages, the number of language combinations and, consequently, the number of MT systems would be 399. A new idea came up then. It consisted of translating the source language into an 'interlingua' and then making

the transfer from this 'interlingua' into the target language. This way, the N^2 problem would be reduced to a 2N task. As a result, many systems were developed but only a few like the Japanese PIVOT from NEC and ATLAS II from Fujitsu are still in use. Another problem was that these MT systems only analysed and translated one sentence at a time and did not take context into account. Consequently, words with multiple meanings were translated at random and many times made no sense. This contributed to their "bad fame".

According to Van Der Meer (2005), this led to new approaches that were based on the premise that common sense and general knowledge is more important than linguistic knowledge and, therefore, the new systems started to analyse large corpora of texts instead of just one sentence trying to simulate the way human translators work. This new "general knowledge" approach is known as "data-driven" and it has two categories, namely, a statistical and an example-based approach. The example-based MT systems (EBMT) resemble the principle of translation memory (TM) but analyses phrases within sentences and add algorithms that help to match, combine and compose target language sentences. On the other hand, statistical-based MT systems (SBMT) rely on probabilistic and statistical models to compute the most likely translated sentences.

With time the use of MT became a matter of economics for two reasons. Initially because human translators were employed as "post-editors" and later, because with the evolution of these systems, more complex texts can be translated accurately and in many cases there is no need for human translation at all (refer to case study 1). In order to optimise the results, as far as quality is concerned, it seems to be quite useful to use the so-called "controlled languages". Hutchins states that one of the earliest examples of this is the application of the Systran system by the Xerox Corporation where both the use of specific terms and the construction of sentences is established. He also affirms that the advantages of this approach are the avoidance of ambiguities in the input, the resultant better quality output, the faster production of technical documents in several languages at the same time and the production of more easily comprehensible English documents.

Many multinational companies have become aware of these advantages and decided to make use of this approach. Examples of this are Ford, Volkswagen, and many more. Compared to the US, where machine translation is in use more widely, European companies are also becoming more aware of the benefits of these products. Apart from MT used in industry, another example of a customised MT system in a specialised area is the program developed for TCC Communications for translating closed captions from English into Spanish on television programs. This type of translation has many constraints compared to regular translation, that is, it has to be done in real time, and it must overcome the challenges of colloquialisms, dialogue, robustness, etc.

In order to give an overview of the practical use of machine translation in corporate environments, we selected a couple of companies using machine translation in their production process.

Automotive companies belong to the type of industry that is more likely to face communication problems due to language barriers because they usually set up their plants in different countries and, therefore, policies, instructions, etc must be explained in different languages and also because workers belonging to the same company may have to go to a different country and, consequently, face the linguistic and cultural differences. For that reason, our first case study is based on Ford as an automotive manufacturer.

Description of Ford solution

In 2002, Dr. Nestor Rychtyckyj, who works for Ford Motor Company, wrote an article titled 'An Assessment of Machine Translation for Vehicle Assembly Process Planning' in which he explains how Ford has overcome the problem of language barriers within its plants. For over ten years, Ford Vehicle Operations has utilised an Artificial Intelligence (AI) system to assist in the creation and maintenance of process build instructions for their vehicle assembly plants. This system, known as the Direct Labor Management System, utilises a restricted subset of English called Standard Language as a tool for the writing of process build instructions for the North American plants. The expansion of DLMS beyond North America as part of the Global Study Process Allocation System (GSPAS) required them to develop a method to translate these build instructions from English to other languages. This Machine Translation process, developed in conjunction with SYSTRAN, has allowed them to develop a system to automatically translate vehicle assembly build instructions for their plants in Europe and South America.

Ford uses the Direct Labor Management System (DLMS) to direct the use of labor on its assembly lines. According to Rychtyckyj (2002), DLMS achieves standardisation within the vehicle process build description, provides a tool for accurately estimating the time required to perform the vehicle assembly and the framework for allocating the required work among several operators at the plant, and 'builds a foundation for automated machine translation of the process descriptions into foreign languages'.

In order to provide the instructions and necessary information to build vehicles or parts of them, Ford uses process sheets which are written in the so-called Standard Language. This is a controlled language developed at Ford in conjunction with industrial and manufacturing engineers and provides for the expression of imperative English assembly instructions at any level of detail. The terminology is then stored in the DLMS base as a semantic category. Verbs, for instance, are associated with specific instructions and, if necessary, they can be modified by adverbs. Every verb describes a particular action. The controlled language sentence must have at least a verb phrase written in the imperative form and a noun phrase acting as the object. As happens in a natural language, a greater level of detail can be added by using other parts of speech such as prepositional phrases; this is entirely up to the process writer. If any errors are found, they are marked by the system and sent back to the engineer who will fix them before releasing the process sheet. The following is an example of how a sentence is parsed:

(S (VP (VERB FEED)) (NP (SIMPLE-NP (QUANTIFIER 2) (DIM (QUANTIFIER 150) (DIM-UNIT-1 MM)) (ADJECTIVE WIRE) (NOUN ASSEMBLY))) (S-PP (S-PREP THROUGH) (NP (SIMPLE-NP (NOUN HOLE) (N-PP (N-PREP in) (NP (SIMPLE-NP (ADJECTIVE LIFTGATE) (ADJECTIVE OUTER) (NOUN PANEL)))))))

Figure 26 – Sample of parse tree structure in DLMS. (Rychtyckyi, 2002),

As the vehicle assembly process is very dynamic and, therefore, continuously changing, the controlled language has to change and evolve continuously as well. According to Rychtyckyj (2002), these changes are approved by the Industrial Engineering organization and then added to the system. Also, 'the use of Standard Language has eliminated almost all ambiguity in process sheet instructions' and 'improves the quality of translation by limiting both the syntax and vocabulary of the text that will be translated. These restrictions must be enforced through the use of a checker that will accept or reject text based on its compliance with those rules'.

In order to encode time and motion information, the grammar of the Standard Language had to be modified in relation to general English grammar and, consequently, equivalents had to be found in the target languages. This caused some problems in the implementation of machine translation because 'the sentence structure in Standard Language is always imperative with the verb phrase in the beginning of the sentence. The verb phrase could also use a modifier that could impact the meaning of the verb. This modifier is in the form of an adverb, but in some cases, this word is a noun or an adjective that functions as an adverb. For example, the term "Robot Spot-weld the Object" uses the word "Robot" to modify the verb. These types of unconventional grammatical usage caused problems for SYSTRAN, which was developed to work with common English grammar' (Rychtyckyj, 2002). Another crucial issue was the use of long noun phrases because if the whole phrase is not present in the dictionary, the system would do a word-for-word translation which, in most cases, was incorrect and had to be manually translated. Among the many problems they had to face, there was also the fact that some terminology was specific to Ford. This meant that no one outside the company would be able to understand certain terms and they were even difficult to understand for some people working at Ford. As a consequence, these terms had to be translated manually before adding them into the SYSTRAN dictionaries. Moreover, there is the issue of multiple spellings and misspellings. As the DLMS system allows engineers to add new terms, it is also possible to make mistakes when writing a term or to write it in different ways. For instance, some engineers would enter acronyms with periods, e.g. A.B.S and others without them, e.g. ABS. This could lead to some inconsistencies. Rychtyckyj (2002) claims that 'attempts were made periodically to clean up the knowledge base, but multiple terms did not become an issue until they all had to be translated'. The translation of verbs was also a source of trouble because, as stated previously, each verb represents a specific action and is defined in an unambiguous way. Trying to transfer the meaning into other languages can be an ordeal and, in some cases, an impossible task. According to Rychtyckyj (2002), 'the translation was

accomplished only after spending considerable time on redefining their meanings in English and then translating the verb based on the most common usage in the target language. In some cases, one single English verb would have multiple translations based on its context or object that it was acting upon'. Compound verbs which are a creation of Standard Language also constituted a translation problem because they also have to be created in the target languages. These verbs express two actions that usually occur together (i.e. press-and-hold). In addition, the use of articles is optional in Standard Language and they are not usually used, whereas the MT software expects complete English sentences, and this can also lead to translation errors. According to Rychtyckyj (2002), 'this problem was partially solved by modifying the parser in the AI system to add articles into the text where appropriate. Another extension to Standard Language allowed for the usage of certain adjective modifiers after the noun in order to override some attribute of the part. This structure also caused problems during translation and the parser was modified to handle these problems also. Abbreviations are also expanded into their full size before the translation to prevent similar errors with their meaning'. However, one of the greatest problems was the use of comments within Standard Language. It is possible to include any comments in the Standard Language provided they are delimited by brackets, and they do not have to conform the Standard Language rules, so the translation was very unreliable. In short, as Rychtyckyj (2002) states, 'Standard Language was never designed to produce regular grammatical sentences; the goal was to develop a consistent and understandable means of communicating engineering instructions. The initial implementation of Standard Language in our North American assembly plants also encountered user resistance until the process engineers were trained and learned how to use it effectively. It is not a surprise that the translation of Standard Language is also being resisted, as the user community needs to have an understanding of Standard Language before it can accept these translations. In this case the user community includes the plant personnel at the assembly plants that are building our vehicles. The machine translation system cannot be expected to produce exact grammatical translations in target languages and we have had some difficulties in getting this point across to our users'. According to Rychtyckyj (2004), 'Standard Language contains a vocabulary of some 5,000 words including acronyms, abbreviations, proper nouns and the specific terminology of Ford'.

As for the implementation of the MT system, it was integrated into the Global Study Process Allocation System (GSPAS) by developing an interface to the Oracle database. Rychtyckyj (2004) states that 'the goal of GSPAS is to incorporate a standardized methodology and a set of common business practices for the design and assembly of vehicles to be used by all assembly plants throughout the world. GSPAS allows for the integration of parts, tools, process descriptions and all other information required to build a motor vehicle into one system and provides the engineering and manufacturing communities a common platform and toolset for manufacturing process planning'.

All the process build instructions are kept in an Oracle database. They are written in English and validated by the AI system; their translation is completely automated and does not need

manual intervention. Rychtyckyj (2004) states that this validation 'consists of parsing the Standard Language sentence, analyzing it and matching the description to the appropriate work description in the knowledge base and creating an output set of work instructions, their associated MODAPTS codes and time required to perform each operation. MODAPTS codes (Modular Arrangement of Predetermined Time Standards) are used to calculate the time required to perform these actions. MODAPTS is an industrial measurement system around the world'. After the validation of the process sheet, the AI generates the proper MODAPTS codes and times. It may happen that a vehicle is built at different plants in different countries. It that is the case, the information about each local plant is stored in the database and those plants that require translation are picked up by the system.

The characteristics of this controlled language mentioned above made the DLMS application, as maintained by Rychtyckyj (2002), a very strong candidate for machine translation and after an evaluation, they decided to go with SYSTRAN. The challenge was enormous as the amount of data they had to translate consisted of some 50,000 terms for each vehicle/language pair. The process is carried out in three steps:

1. Ford's translation programs extract the data from the Oracle database.
2. They use SYSTRAN to complete the translation.
3. They write the data back into the Oracle database.

Ford and SYSTRAN developed the customised dictionary that contains Ford technical terminology based on input from human translators and, to measure the quality of the output, they use the J2450 metric developed by SAE. Ford also carried out a thorough analysis of the source text to identify which terms are used more often. In order to do so, they used the parser from their AI system to store parsed sentences in the database. In Rychtyckyj's (2002) own words, 'periodically, we run an analysis of our parsed sentences and create a table where our terminology is listed in use of frequency. This table is then compared to the technical glossary to ensure that the most-commonly used terms are being translated correctly. The frequency analysis also allows us to calculate the number of terms that need to be translated correctly to meet a certain translation accuracy threshold'. As an MT system like SYSTRAN has to translate sentence by sentence in order to achieve a greater level of accuracy, it is necessary to build sample test cases for isolated words or phrases that will need to be tested for translation accuracy. Every test case uses every specific term in its correct usage within the sentence. According to Rychtyckyj (2002), 'a file containing these translated sentences (known as a test corpus) is used as a baseline for regression testing of the translation dictionaries. After the dictionary is updated, the test corpus of sentences is retranslated and compared against the baseline. Any discrepancies are examined and a correction is made to either the baseline (if the new translation is correct) or the dictionary (if the new translation is incorrect)'. Since translation quality varies significantly between translation evaluators, Rychtyckyj (2004) states that they 'have also allowed the users to

manually override the translated text with their preferred translation. These manual translations are not modified by the system, but have to be redone each time that the process sheet is revised.

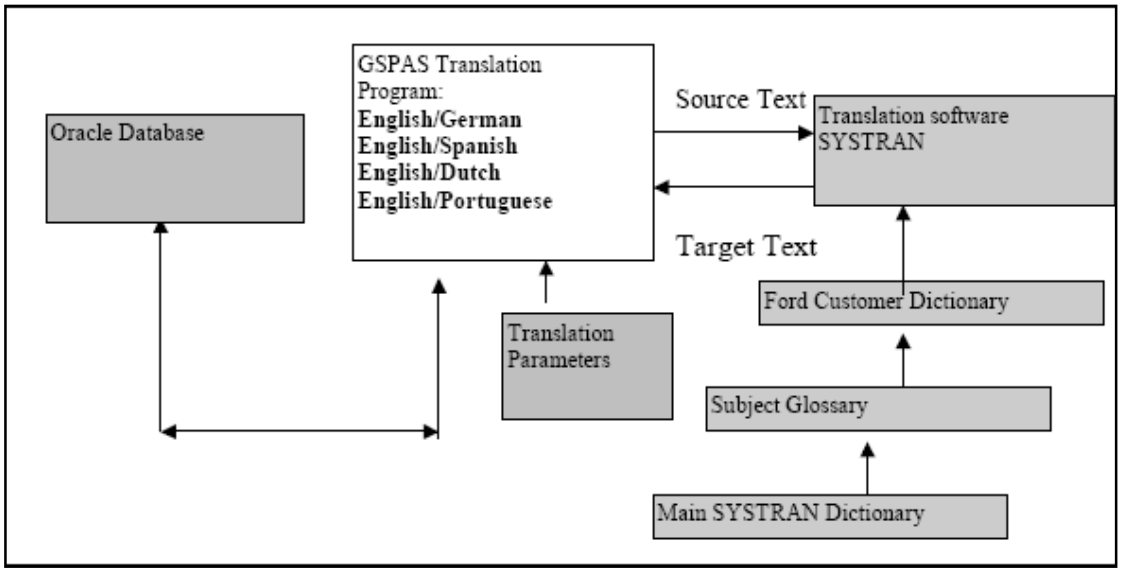

Figure 27 – Machine Translation in GSPAS. (Rychtyckyj 2002)

For Rychtyckyj (2004), 'the greatest improvements to machine translation quality can be made by limiting the expressiveness and grammar of the source text by imposing restrictions on that text. This restricted language improves the quality of translation by limiting both the syntax and vocabulary of the text that will be translated. These restrictions must be enforced through the use of a checker that will accept or reject text based on its compliance with those rules'.

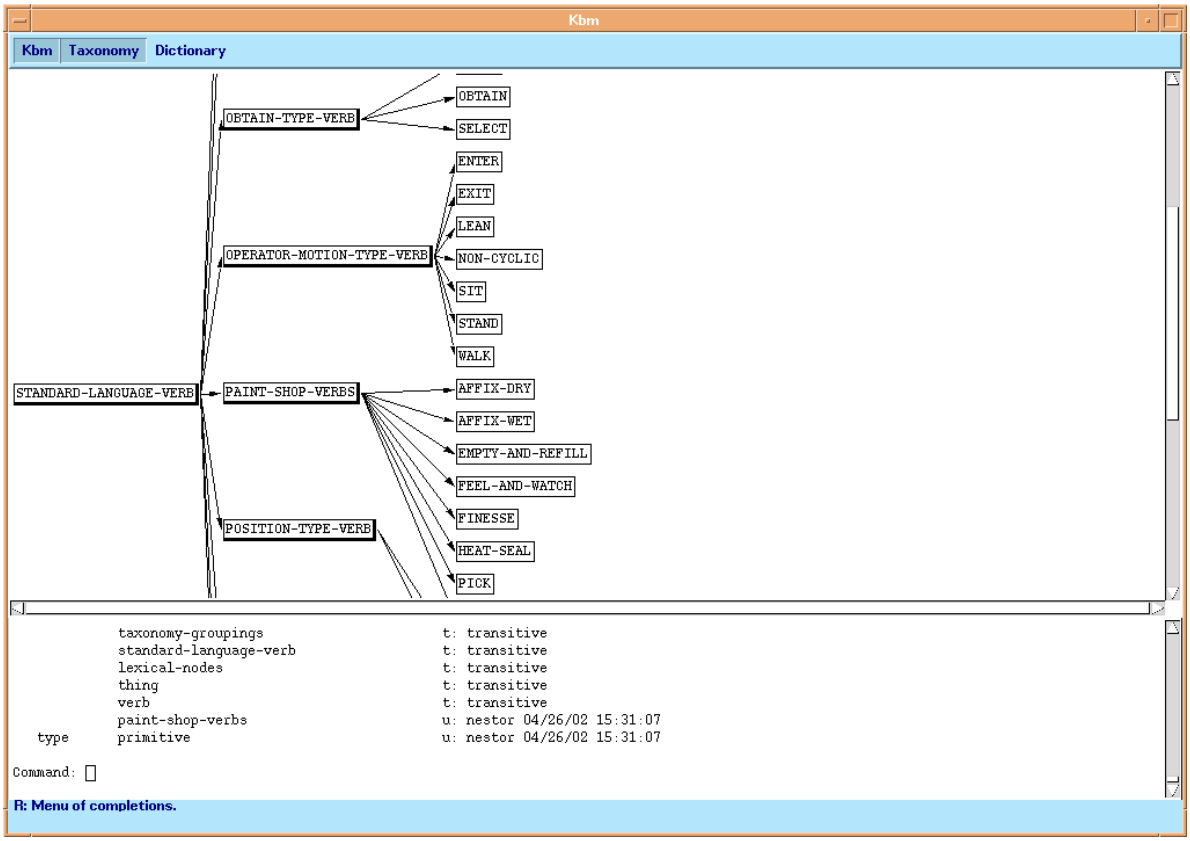

Figure 28 – The Knowledge Base Manager (KBM). (Rychtyckyj 2004)

As for system maintenance, Rychtyckyj (2004) claims that the initial release of their MT system 'was designed so that all updates to the technical glossaries required SYSTRAN to create and compile a new set of dictionaries that would include the new changes. SYSTRAN would need to test these dictionaries through their internal quality control program and then deliver the updates to Ford. We would also need to test the updates against our internal benchmarks and deploy them into production if the result of the testing was acceptable. The entire process would be delayed if any problems were discovered during testing. This approach was too cumbersome and time-consuming and was not viable for the long term'. In order to build a process for on-line dictionary management, SYSTRAN developed an Excel spreadsheet-based system which allowed Ford to modify the translation of an existing lexical item and add new terminology to the spreadsheet. At any time, they could recompile the whole spreadsheet and create a new set of translation dictionaries which would be tested against Ford's benchmarks and deployed if all translations were correct. Nevertheless, according to Rychtyckyj (2004), this approach had some imperfections, namely:

1. It was not possible to test individual terms for accuracy and they had to recompile the whole dictionary.

2. Every recompilation of the dictionary required all the sample translation to be tested again for accuracy.

3. It was impossible to control the changes that were being made to the spreadsheet.

As a result, SYSTRAN developed the Systran Review Manager (SRM), a web-based system deployed on a Ford internal server which allowed them to control the access to the application. Ford users received the proper training in order to be able to use this tool and they achieved the following benefits through it:

1. Changes to the technical glossaries can be made by the users and a translation can be run immediately. This translation will test how the change impacts translation quality.

2. The SRM allows users to create and modify different versions of the user-defined dictionaries without interfering with the changes being made by another user.

3. It is possible to load and analyze the corpuses directly within the SRM.

4. The web-based architecture of the SRM allows Ford's users to have access to the system without any additional hardware of software requirements.

5. The SRM provides very quick turn-around time for the process of modifying and deploying an updated translation glossary.

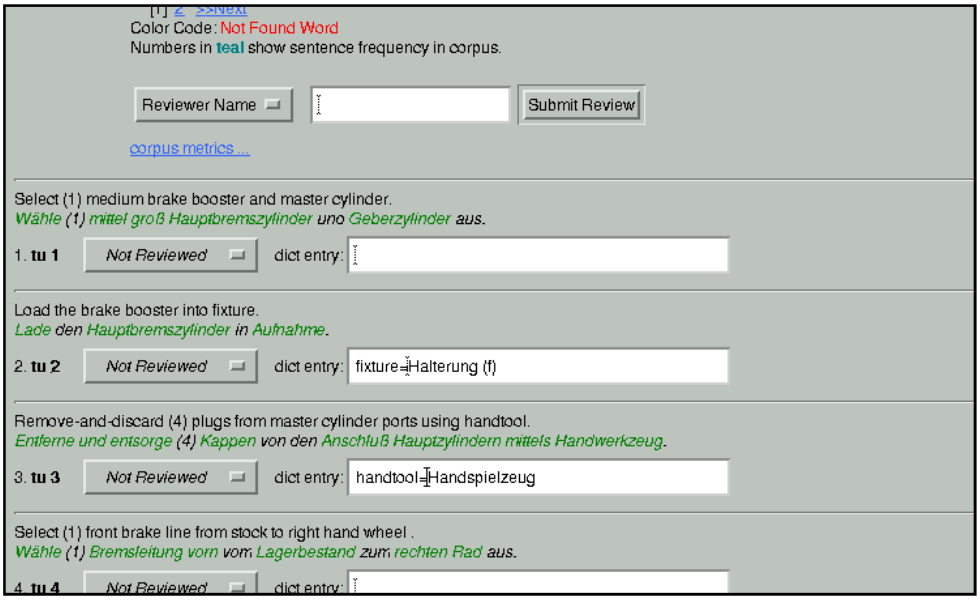

Figure 29 – SYSTRAN Review Manager. (Rychtyckyj 2004)

As discussed previously, free-form texts or text not written according to Standard Language rules but in normal English grammar, such as comments, presented a translation problem. Another aspect of the dictionary maintenance deals with this issue. According to Rychtyckyj (2004), 'a Standard Language element may contain embedded free-form text that is ignored by the AI system; however this text must be translated and sent to the assembly plants. This free-form text usually consists of additional information that may be useful to the operator on the assembly line'. The following figure contains an example of a sentence with embedded free-form text comments:

PLACE TWO MOULDINGS INSIDE HEATER {TAPE SIDE UP}

Figure 30 – Example of free-form comments. (Rychtyckyj 2004)

According to Rychtyckyj (2004), the text in brackets 'is not really part of the sentence; it actually describes the position of the mouldings. Therefore, a translation system that processes this sentence as one entity would not generate an accurate translation. This problem is solved by embedding tags into the source text before it gets translated. These tags function to identify comments and provide the translation program with information about how these comments should be translated. Short comments are processed differently from long comments within Standard Language regarding translation parameters (dictionaries and segmentation)'.

The underlying software architecture that supports Ford's translation system constitutes another aspect of system maintenance. Rychtyckyj (2004) maintains that a set of programs communicating with a database as well as with the translation engines and technical glossaries is involved in translation in GSPAS and that 'most changes to the translation engine processing also require changes to the translation pre-processing programs. In addition, modifications to the database model or upgrades to the operating system require extensive testing and validation of the translation results'.

In summary, it can be said that one of the main solutions to Ford's maintenance problems was the development and installation of the Systran Review Manager (SRM) because it allowed users to test and update the technical glossaries according to their needs. According to Rychtyckyj (2004), the implementation of the SRM has reduced their turnaround time for deploying changes to the dictionaries from two months to less than 48 hours.

Description of Volkswagen solution

'Volkswagen sells its vehicles in more than 150 countries, which means that information management tasks and associated potential problems can become very large' (Bernardi, Bocsak, & Porsiel, 2005). For this reason, language issues can become one of the key points for the company, as happens in many other international companies, and so an accurate and fast translation solution is needed. 'In addition to owner's manuals, approx. 40,000 pages of highly diverse publications are produced annually in the Workshop Information department of Volkswagen's headquarters in Wolfsburg'. Although German is the source language, all this material has to be translated into over twenty different languages including English, Spanish, Hebrew, Chinese, etc. In order to overcome this issue and others like greater vehicle complexity, shorter time-to-market and reduced innovation cycles, Volkswagen started a terminology management project which involved translators, technical authors and terminologists and the main objective was to ensure high quality information for both internal and external use.

Sometimes having the gist of a document is enough to make a decision because a complete and deep understanding of the whole text is not necessary. However, on other occasions, a deep and thorough understanding is essential. For this reason, 'advanced, powerful and easy-to-use tools for internal communication within the Volkswagen Group were needed for gaining information quickly for business research, reporting and monitoring to overcome the language barriers between the company's 340,000+ employees in production, design, research and assembly locations all over the world. Machine translation is a tool which can help accelerate everyday processes by providing the user with "raw" or "gist translations" in a split-second for sources such as e-mails, reports, websites etc. thus helping the user gain a competitive edge when it comes to further action to be taken. For standardisation and real-time availability of specific Volkswagen terminology, integration of terminological tools and large-scale terminology imports into the machine translation system proved to be indispensable. Thus, the basis for the Language Portal was formed, and Volkswagen terminology was integrated into MT engines to ensure high terminology consistency throughout the Group' (p.42). According to these authors (p. 42 ff) 'Volkswagen's terminology management project has three main components:

1. A web-based **multilingual terminology database initially** containing some 12,000 revised terms in German, English, French, Russian and Spanish. Each of the entries comprises a definition, a context example, sources, comments and illustrations where necessary and helpful. This customised multilingual dictionary is made available via the Language Portal throughout the whole Group as a unique terminology and corporate language quality assurance system. The terminology database is also vital for supplying verified terminology to the two following applications. Altogether, 'Volkswagen's Language Portal now (as of December 2008) contains a comprehensive multilingual company-specific terminology database with automotive-specific content in 20 languages with approximately 15,000 German terms and contains exclusively group-specific concepts. It is continuously enlarged, maintained and updated by terminologists and translators.

2. **Machine translation** in German, English, French, Russian and Spanish for internal communication among Volkswagen Group employees.

3. An **automated authoring system**: this complex tool supplies authors a range of functions such as checking of spelling, grammar, style, validated terminology and specific Volkswagen abbreviations. Terminology is imported into the system via an interface to the terminology database which is maintained continuously by Volkswagen translators and terminologists'.

MT had been used before at Volkswagen Coaching but after the launch of Volkswagen Language Portal, it was handed over to the terminology project staff.

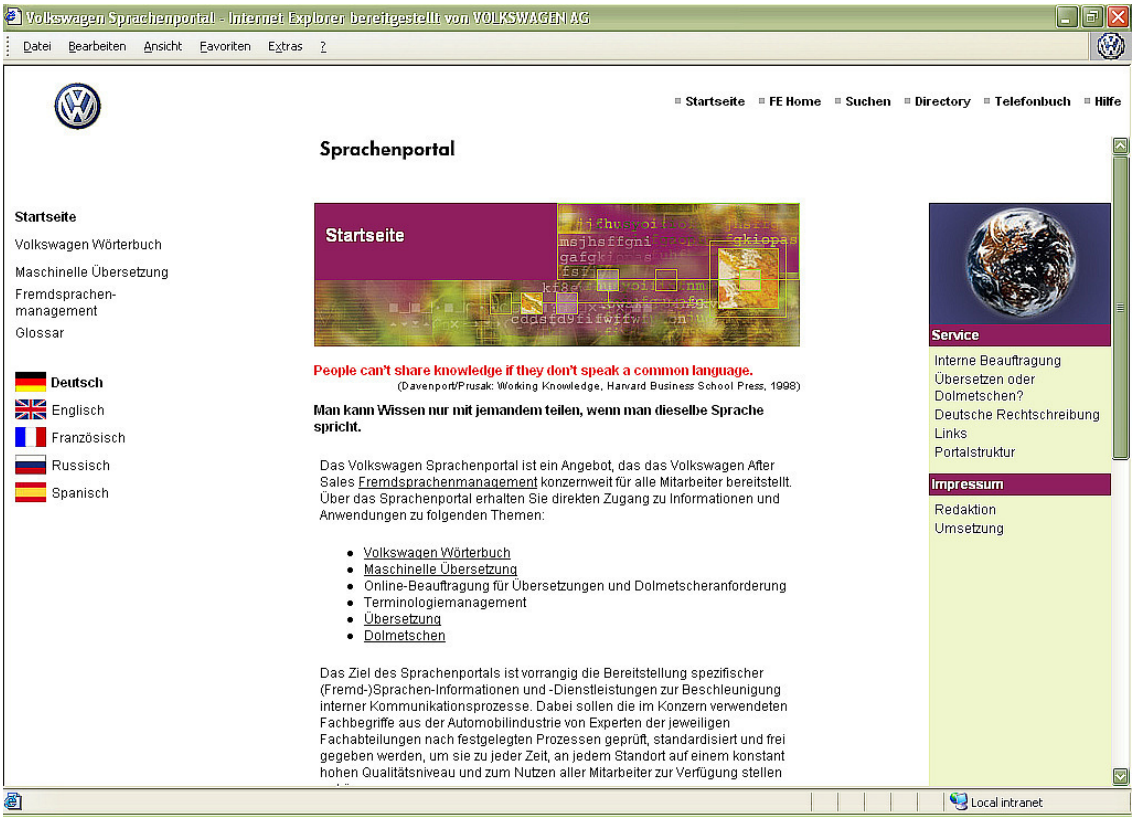

Figure 31 – Volkswagen Language Portal in 5 languages. Screenshot provided by Volkswagen in June 2009.

After testing several MT providers, Volkswagen decided to choose Lucy Software and Services GmbH's Translator Server (formerly Comprendium). The languages used are German, English, French, Russian and Spanish.

Volkswagen tested its Language Portal together with a first test of the machine translation software between December 2002 and the summer of 2003, and they found out that 'sent tasks/hits totalled approximately 465,000 per month in a phase where access was limited to a very small number of specially selected users. Internal demand for fast gist translations turned out to be extremely high, much higher than expected. General access to the Language Portal, and thus to Machine Translation, was provided on 21 September 2004: The number of hits within the first month increased by a stunning 2 198%. Currently, an average of 7000 machine translations are carried out every day, this means a translation volume of 1 500 standard pages per day. (Porsiel, 2008, p. 59)

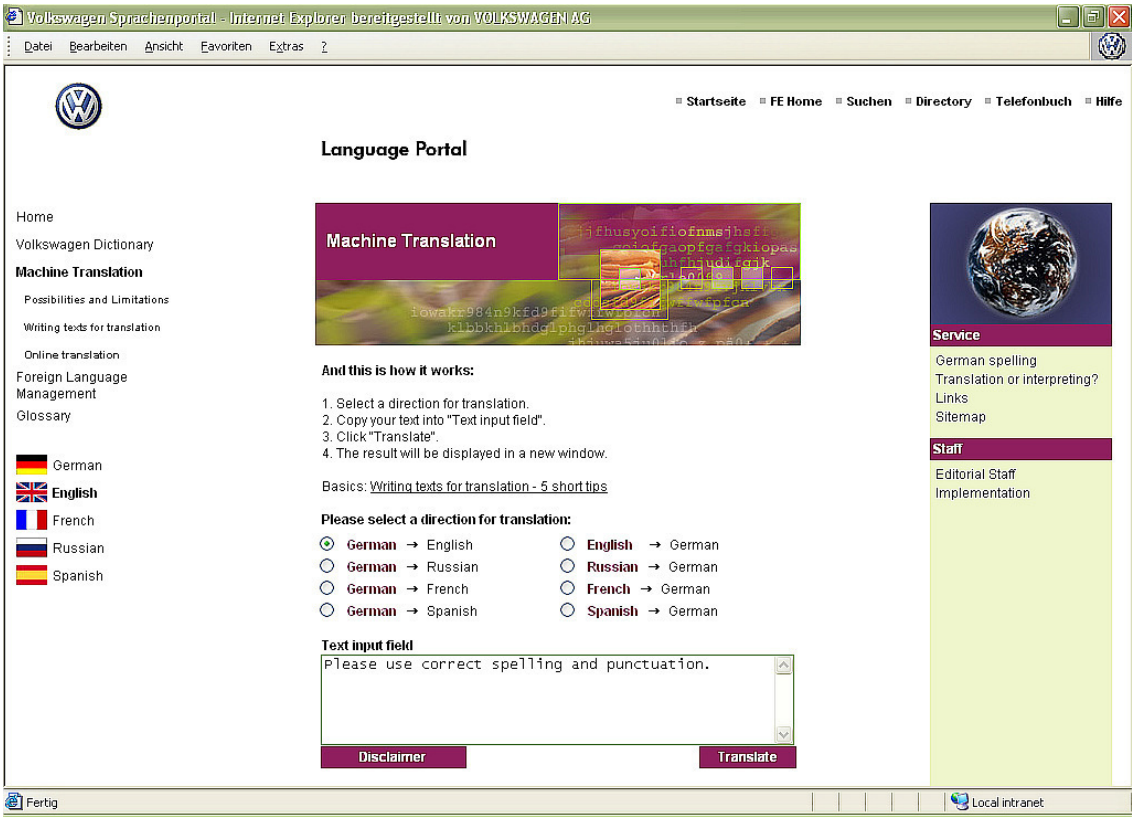

Figure 32 – Volkswagen Language Portal – Machine Translation. Screenshot provided by Volkswagen in June 2009.

The above two case studies show that machine translation, especially when implemented in conjunction with other quality enhancing tools, can be deployed successfully, provided that the required support in terms of funding and human resource allocation is available at senior management level. Initial investment is high, but the ROI is impressive.

Some forecasts

According to a study conducted by Lazzari in 2006, "Human Language Technolgies for Europe (Lazzari, 2006), the language industry is rapidly growing, but the full potential of machine translation will go beyond an efficiency improvement of current human translation. It is expected to unfold in market segments that barely exist at present and that are so low-margin that they will never be attractive for human translation services. Just as it was impossible to extrapolate SMS usage from the usage of telegrams, we have a hard time predicting the translation volume of the future. It will be very large, and it will help unfold the part of our economic potential that is still being blocked by language barriers.

A study carried out by Common Sense Advisory in 2007 across 8 countries (The countries were Brazil, China, France, Germany, Japan, Russia, Spain, and Turkey) "Going from Simple Translation to Successful Transactions on Global Websites" (2007) states that "more than half of the respondents sometimes use machine translation (MT) to read an English-language website – even if they are proficient in English. This proved our contention that machine

translation is far better than the option of no translation at all. We also found that this usage of automated translation maps intriguingly to the relative quality of output (with Spain being an exception). French and German output is better than Turkish, Chinese, and Brazilian Portuguese. Japanese buyers are more accustomed to using MT output, having relied on it for many years."

Further evidence was collected in another study, published earlier this year: Cross Language (Cross Language, 2009) conducted a survey among over 250 independent Language Service Providers (LSPs) in order to investigate to what extent machine translation (MT) as a Computer Assisted Translation (CAT) technology is currently being used in the translation services business area. The participating LSPs were globally located with varying sizes and diverse market services. The sample was sourced from the company's client database.

The survey consisted of 30 questions sent to over 250 independent Language Service Providers (LSPs). The most relevant questions can be viewed inAppendix XII, page 186.

This study seems to suggest that machine translation is gaining acceptance amongst language professionals. This is certainly at least partially due to the fact that Google is now offering free machine translation on the internet which increases acceptance by consumers and therefore also increases acceptance by linguists.

Further evidence along the same lines is given in the results of the March 2009 TAUS market survey (TAUS, 2009): only 14% of the LSP respondents state that they will never use MT, 40% already use it today. This provides strong evidence that MT is moving into the mainstream among LSPS. To launch a series of reports on LSP deployment, this report focuses on the two major LSPs which own and develop their own MT systems.

The world's second and third largest language service provider companies Lionbridge Technologies (US) (2008 revenues US$ 419.0 million 3 820 employees, 48 offices) and SDL International (UK) (2008 revenues US$ 174.5 million, 1 700 employees, over 50 offices), are also two of the very few LSPs to have acquired, developed and use their own machine translation systems.

Other LSPs who have some experience in deploying MT systems include CLS Communications (DE, CH), which uses an in-house version of the BrainTribe MT system (now developed and marketed under the Lucy Software umbrella), and WorldLingo (US), which uses MT technology as both an advertising gimmick and a production tool. Compared with them, however, SDL and Lionbridge maintain substantial development teams for their wholly-owned systems, but until very recently, have tended to use the technology as a discreet asset rather than as a major plank in their strategic or marketing development.

However there are clear differences in the two companies' MT agendas. Unlike Lionbridge, SDL also sells its translation technology, alongside its services. Having first acquired Trados (translation memory and terminology tools) and then Idiom (GMS solution), with their existing

broad customer bases in the translation industry, SDL announced in October 2008 that it was marketing a new range of translation technology products which includes its "automated" translation solution. This brings SDL out of the MT as a production option space and into the MT *vendor* market where systems are sold either under license or as off the shelf products. It is therefore competing either head-on or indirectly with players such as Language Weaver (US), Systran, and PROMT (RU), as well as with the dozen or so much smaller technology providers working across restricted language pairs, (e.g. AppTek (US) and Linguatec(DE)). Like some other vendors, it also offers a free machine translation service online[13] for the automatic translation of websites and short text.

There is probably only a slight chance today of another LSP investing deeply in MT technology as a development option, more because of the very high cost of skilled human resources and the development/training process than the actual technology itself in a market that is under increasing price pressure.

However, TAUS has collected evidence of the strong likelihood that LSPs will engage much more closely with MT, either by licensing some form of technology, working in partnership with an MT vendor (as in the PROMT's LSP Partnership Program) or working more closely as a supplier of post-editing services with large-account customers who may decide to use the technology in-house.

It is also more likely for language-centric people such as translators to opt for rule based or hybrid systems rather than statistics based MT systems. Rule-based systems embody declarative "linguistic knowledge", whereas data-driven language-independent SMT systems take a more "engineering" approach to the process.

However, a number of LSPs are beginning to experiment with the Moses open-source MT engine, which means that their principal costs will be in people rather than software licences. It may well be possible for even smaller LSPs to train and tune very finely-targeted SMT engines, once they have access to large collections of language data (e.g. via TDA), and build up capabilities in SMT deployment. Examples of LSPs going down this route are Translated.net and Pangeanic.

Lionbridge and SDL are therefore likely to remain in a special category as LSPs due to their capacity to develop MT technology as well as service clients with production solutions. At the same time, they are pursuing quite different strategies.

SDL is strengthening its position as technology supplier, both at the level of infrastructure with its newly Common Enterprise Application Framework, and by recent acquisitions of content management systems, and in terms of selling tools (MT system, authoring system, GMS, TMS, translation memory), much to dismay of many LSPs who feel locked into these products while

[13] http://www.freetranslation.com/

SDL is competing against them for translation business. It will be interesting to see how many LSPs interested in deploying MT as a partial solution to their service requirements benefit from SDL's MT offering, rather than using pure plays such as PROMT or Systran, for example. LSPs who act as subcontractors to SDL already have access to the service as a option, and a small subset of these also license MT software from MT system vendors, playing off different quality levels and language pairs as they search for the optimum cost-time-quality equation.

4.3.4.7. Translation management systems

These systems are designed to manage and (partially) automate translation workflows. They are translation driven and include automated analysis of a document, automated pre-translation using translation memory and terminology tools, as well as automated post-processing tasks using workflow technology.

The by far most popular system has been Idiom World Server. Its popularity is mainly due to the fact that the technology was provided free of charge to all interested LSPs in an attempt to lock them into the system. Unfortunately, the system was sold to SDL before being able to prove its ability to succeed independently. This has hopefully been a lesson to LSPs teaching them that technology cannot come for free in the medium and longer term and that provisions must be made for investments in technology in order to remain competitive.

The SDLTeamworks solution is installed at a few corporate sites and there are plans to merge it with Idiom World Server to create one final SDL commercial TMS solution.

GlobalSight is another TMS and now is a collaborative, open source initiative to develop a flexible and sustainable Translation Management System. GlobalSight embraces an ecosystem of enterprise clients, translators, language service providers, technology suppliers, universities, research institutions and individuals alike. Originally offered as a commercial system without the success required for it to survive, it was recently acquired by Welocalise who were realistic enough to see that they would be unable to turn such a mammoth into commercial success, and offered it as open source solution in order to have multiple (potential) users contribute to its functionality.

Freeway is a system offered by Lionbridge to their service customers and to their suppliers free of charge, including their Logoport translation memory.

Language Director by thebigword is another TMS offered to clients as part of their service offering.

SDL Trados Synergy is a TMS for small companies.

In our primary research, 562 respondents out of a total of 1103 valid responses refer to language technology tools. 88 respondents confirmed their use of TMS systems, which corresponds to 7.98% of the total responses on tools and 15.66% of all valid responses. Again, SDL leads with 8 responses relating to the SDL TMS, and another 7 responses for SDL Synergy,

reflecting the different sizes of the responding organisations. The next in line is Across (7), followed by Projetex and Translation Office 3000 (5 each) in third position. These are both business management tools for individuals and very small companies and do not quite fit the definition above as they do not incorporate translation memory systems. Position 4 is shared by Idiom, Plunet, Project Open and LTC technology (mentioned 3 times each). Once again, Plunet, ProjectOpen and LTC do not quite fit the definition above. They interface with TM tools, but do not use proprietary TM technology. 86 respondents use translation management systems developed in-house, and most likely mean by this translation business management tools. For more detailed statistical information please refer to Appendix XI, page 155.

4.3.4.8. Business information systems specific to the language industry

These systems manage business workflows (request management, project management, resource management, financial management, business reporting etc.) specific to the multilingual production process. A number of systems are available on the market, for freelancers, small and larger size LSPs as well as corporate language service departments.

In our primary research, 562 respondents out of a total of 1103 valid responses refer to language technology tools, 45 respondents confirmed their use of business information systems, which corresponds to 4.08% of the total responses on tools and 8.01% of all valid responses. Translation Office 3000, a system for individuals and micro LSPs leads the table and was mentioned by 9 respondents, followed by Plunet and LTC (4 each). Projetex is mentioned twice, and all other systems only once. 45 respondents use business systems developed in-house. For more detailed information please refer to Appendix XI, page 156.

4.3.4.9. Language training software (desktop and web based)

This is software supporting the language learning process, including vocabulary, pronunciation, basic grammar exercises etc. They cannot replace human language teaching but can be used as a tool to support and greatly enhance the language learning process, particularly at beginners' and intermediate levels.

A multitude of software is available at different price levels and it would be beyond the scope of this study to list and evaluate them all. In our primary research, 562 respondents out of a total of 1103 valid responses refer to language technology tools, only 15 of these respondents confirmed their use of language training software, which corresponds to 1.36% of the total responses on tools and 2.67% of all valid responses. 12 respondents ticked the box for in-house developments. For a list of the tools mentioned please refer to Appendix XI, page 157.

4.3.4.10. Conference and telephone interpretation systems

A simultaneous interpretation (SI) system is a unique configuration of conference electronics that allow a conversation to be heard in several different languages "simultaneously". If this equipment is not being used, conferences needing language interpretation must rely on "consecutive" interpretation in which the interpreter repeats everything the speaker says every few sentences. Conference audio (called the floor channel) is fed into the SI control unit where it is routed into the headphones of simultaneous interpreters. These interpreters are highly skilled language specialists that have the unique ability to listen in one language, interpret what the delegate is trying to communicate, and simultaneously speak the information in a different language into their microphone. The interpreted audio is then distributed back to the conference delegate.

A telephone interpretation assistance device makes it possible, in telephone interpretation when persons who speak different languages meet each other, that an interpreter interprets the speech of a speaker in progress simultaneously without interrupting the speech of the speaker or mixing up the conversation, thereby allowing quick and precise interpretation. Telephone interpretation services are provided by using a telephone interpretation system using the telephone interpretation assistance device. Bidirectional simultaneous interpretation services are provided by using the telephone interpretation assistance device and the telephone interpretation system. Some systems also calculate the duration and cost of calls.

The barriers to entering the translation field are low. The same cannot be said of telephone interpreting.

Every technology has a life span. Thankfully for companies offering telephone interpreting services, there will be a need for speech-to-speech communication across languages as long as humans speak to each other, although sooner or later, video interpreting is likely to replace telephone interpreting. Also, computer-assisted interpretation is experimented with and will reach commercial exploitation quality in the next few years by combining machine translation with speech recognition and text to speech technology.

In summary, several technology research areas and pilots are likely to reduce the telephone interpreting market. On-site interpreting is expensive in terms of human resources and travel and subsistence costs, demand is rising, so telephone interpreting and other remote translation / interpreting offerings fill in the gaps. In years to come, we predict that remote and computer-assisted methods of delivering spoken language services will take over more and more of the total interpreting market share along with the TI market. Providers will either invest in the technologies that will enable them to stay ahead of the game, participate in the development of these replacements and reap the benefits – or gradually see their services replaced by more cost-effective and efficient alternatives.

Many telephone interpreting companies have developed business management systems to help their customers manage their telephone interpreting usage. Some even help the interpreters by pre-provisioning them with assets that they need to do their job (Kelly, Beninatto, & De Palma, 2008a). These promising interpretation business management systems (IBMS) reflect the development of translation management systems (TMS). Systems currently available on the market place are by Telelanguage, which offers its Interpreter Management and Scheduling Software system as well as its GlobalInterpreter Platform program. It sells both systems to other companies, including some of its competitors. Thebigword – originally focussing on offering translation and localization services – has expanded their LanguageDirector, a translation management system, to cover Interpreting Management as well.

In our primary research, 562 respondents out of a total of 1103 valid responses refer to language technology tools, only 18 respondents confirmed their use of such systems, which corresponds to 1.63% of the total responses on tools and 3.2% of all valid responses. SDL Trados Multiterm is still the clear market leader and was mentioned by 232 respondents, followed by Wordfast (19), SDLX (14), Across (13) and Deja Vu (11). 104 respondents use terminology tools developed in-house, and this most probably means the use of simple spreadsheets. For more detailed statistical information please refer to Appendix XI, page 158.

4.3.4.11. Combined offerings and open systems

Some software houses combine two or more of the above technologies or allow easy integration with other systems. An increasing trend of partnerships between software vendors offering complementary technologies can also be observed.

4.3.5. Language teaching

If materials collected for the other sectors are inhomogeneous, this is especially true for language teaching. Publications analysed for this sector comprise language teaching policies at national and European level, as well as some very limited information provided by statistics offices and other publications. Data collected either referred to language teaching at compulsory school level, at private language schools, at adult education or at higher education. Since data was provided in different formats and contents, a direct data comparison was hardly feasible. Mostly, data referred to the number of teachers, the number of students or the number of languages/courses offered. Only in a small minority of cases financial data were available.

4.3.5.1. Institutional language teaching

Most information retrieved about institutional language teaching refers to EU-funded studies and reports. In addition, we found a comprehensive European overview on foreign language tuition at primary and secondary school compiled by Butašová *et al*. on behalf of the National Institute for Education of the Slovak Republic.

A special mention needs to be made for Germany, a federal parliamentary republic of 16 states (*Länder*) in their own right and with their own powers. Each of them has their own state constitutions, their own parliaments and governments as well as their own administration and organisation[14]. The *Länder* are responsible for the German education system and the federal government only has a minor role. For the purpose of the study, all 16 *Länder* were contacted with the request to provide statistics about the language teaching sector. However, each *Land* has its own idiosyncratic strategy of data organisation, collection and display and therefore it was not possible to arrive at one single result on the size of the sector language teaching within Germany.

On a European level, the linguistic landscape has changed dramatically over the last years, and these changes are still continuing. Between 1995 and 2007 the number of official EU languages has more than doubled and regional and minority languages have experienced a substantial revival. Overall, the number of languages spoken in Europe has increased beyond what anyone could have imagined only ten years ago.

In several Member States, there is a clear evidence of changing patterns in language learning and language use at all levels of education (Education and Culture Directorate, 2007, p. 9). The most frequent changes in the system of education of foreign languages in European countries include an increase of the time allocation for teaching and a decrease of the age level for the commencement of teaching of the foreign language. The bilingual teaching of some of the subjects is being introduced in some of the countries, which increases language competence of pupils. Changes for teaching the second foreign language are being supported. Further changes in the system of teaching foreign languages are reflected in the training of teachers (Butašová et al, 2007, p. 66).

Pupils have to learn a foreign language from primary education onwards in almost all European Member States. In several of them, they are obliged to do so in the first year of primary education or even at pre-primary level like in Belgium (German-speaking Community) and Spain. Indeed, the tendency to offer this provision at an increasingly early stage is apparent in most European education systems and reforms along these lines may be observed in several Member States. The percentage of pupils in primary education learning at least one foreign language has risen almost all over Europe in recent years. In 2006/07, in the majority of countries half of all pupils (or even more in certain countries) in primary education learnt at least one foreign language (Eurydice P9 EACEA, 2008, p. 12).

In 13 European countries, all pupils are obliged to learn English during compulsory education. In some countries the same is true for an even longer period extending into upper secondary education. Accordingly, in all these countries the proportion of pupils learning English in secondary education is higher than 90 %. In those countries where English is not compulsory,

[14] http://www.kinder-jugendhilfe.org/en_kjhg/cgi-bin/showcontent.asp?ThemaID=4800

the percentage of pupils choosing it as a foreign language is still close to 90% (Eurydice P9 EACEA, 2008, p. 14).

According to these data it can be concluded that English is the most commonly learnt language in almost all countries. This is confirmed at compulsory school level by Butašová *et al*. for Slovakia (Butašová et al, 2007). In both primary and secondary education, the percentage of pupils who learn English is rising, especially in most countries of central and Eastern Europe and in the Latin countries of Southern Europe. In these latter countries, this trend is especially marked in primary education in which compulsory teaching of a foreign language, or of English as a specific mandatory subject, occurs at an increasingly early stage. German and French generally share the position of second most commonly learnt language. German occupies a stronger position in the Netherlands, several Nordic countries and countries of central and Eastern Europe. For example, the number of hours taught in Slovakia per foreign language can be viewed in the table below.

	Number of hours taught			
	Primary school	**Eight-year Gymnasium [sic]**	**Secondary School**	**Total**
English*	4 504	16 585	12 906	**33 995**
German*	2 680	12 383	11 446	**26 509**
French*	40	2 181	1 064	**3 285**
Russian**	38	449	668	**1 155**
Spanish***	0	610	74	**684**
Latin	0	170	170	**340**
Italian**	0	156	102	**258**
Slovak Conversation	0	0	108	**108**
Total	**7262**	**32 534**	**26 538**	**66 334**

* Including conversation, specialised language and specialised conversation
** Including conversation and specialised language
*** Including conversation

Figure 33 – Number of hours taught at compulsory schools of Slovakia. Source: (Butašová et al, 2007)

French seems to be more popular in the countries of southern Europe, in particular the Latin countries (Eurydice P9 EACEA, 2008, p. 14).

In secondary education, English, French, German, Spanish and Russian represent over 95 % of all languages learnt in the majority of countries. For Slovakia, this was confirmed by Butašová *et al*. (see table above). The percentages of pupils learning Russian are highest in the Baltic countries but this language is also learnt by a large number of pupils in Bulgaria. Therefore, pupils essentially appear to opt for learning more widely used languages. This may be

attributable either to pressure from families or a lack of qualified teachers in other languages (Eurydice P9 EACEA, 2008, p. 13).

Between 2002 and 2006, the amount of taught time for foreign languages as a compulsory subject in primary education and/or lower secondary education has either increased or remained unchanged in all European countries. In a first group (consisting of the majority of countries) the amount of taught time recommended for teaching foreign languages as a compulsory subject in a notional year has been increased and sometimes substantially so. In five of these countries, namely Bulgaria, the Czech Republic, France, Latvia and Slovenia, the increase has been introduced at both primary and lower secondary levels. Just three countries in the group (the German-speaking Community of Belgium, Denmark and Greece), have concentrated on more provision at primary level, while others – Germany (in the *Hauptschule* and *Realschule*), Italy and Cyprus – have prescribed more time for foreign languages at lower secondary level only (Eurydice P9 EACEA, 2008, p. 91).

4.3.5.2. Teaching at private language schools

Our thorough research done within the timeframe available led to the conclusion that information about private language schools is difficult to obtain, unless it is provided by official sources such as national statistics institutes. Our search at the level of national authorities on language teaching figures led to data provision in only seven out of 27 Member States. Merely four countries produced data about private language schools, and the number of sources providing financial information is even smaller:

Czech Republic

There are 16 private language schools which are members of the Czech Association of language schools (AJSCR, 2009), comprising an average number of 137 teachers (of which 57 work permanent and 79 are external) and 2 993 students per school. Moreover, according to the Czech Statistics Office, as of September 2007 there were 9 independent language schools (however, this figure could be part of the figure provided by AJSCR) with state language exam accreditation (Czech Republic NSO, 2009), with an average number of 1 620 students per school. No turnover figure was provided by any of the sources. The only financial information that could be retrieved stated that the average salary of foreign language teachers amounts to approximately between CAD 663 and CAD 918 (between 452 € and 625 €[15]). This information was extracted from a report about the language training market in the Czech Republic which was compiled in 2007 by the Czech consulting company GfK Praha on behalf of Industry Canada in 2007 (Industry Canada, 2007a). The report contains a wealth of information both about the public and the private language teaching market and is the most comprehensive report about one country so far. For instance, it contains some key factors of the Czech language market, an outline of the competitive environment of language schools as well as

[15] 1 € = 1.47 CAD in 2007 (European Central Bank, 2009a)

the profiles of private-sector and public-sector customers of the Czech language training market. In addition, the report supplies names and contact details of a number of language schools and institutes in the Czech Republic.

Estonia

According to Statistics Estonia, there were 133 businesses performing language teaching in 2008, with a total of 583 persons employed, leading to an average of 4.4 employees per business (Statistics Estonia, 2008). This figure seems very low compared to the figures provided by AJSCR in the Czech Republic, even considering that most probably external personnel is likely to be employed.

Finland

The information provided by Statistics Finland stated that in 2007, there were 123 enterprises registered as "language schools and centres" (code 80423) and the personnel amounted to 630 (with an average of 5.1 employees per language school). Statistics Finland was one of two sources to provide some financial information, stating that the turnover in 2007 amounted to **27.8 million €**, and that the average wage per employee was 20 700 € per year. This represents 23% of **122 million €**, the total turnover of translation and interpreting activities in Finland, as presented in the country fact sheet.

In addition, we were provided with a set of tables about the number of students registered in language courses in higher education. The tables can be viewed in the language teaching section of the country fact sheet Finland and they show that far more students are enrolled in German language degrees compared to French.

Slovakia

The Slovak Institute of Information and Statistics INFOSTAT provided some information as regards businesses registered under the classification code 80421 "education in foreign language schools". In total, the number of businesses active in 2008 amounts to 759, including entrepreneurs. The total turnover generated by these businesses in 2008 amounts to **20.8 million €**.

Given that the estimated turnover of translation and interpreting activities amounts to 29 million € (see country fact sheet Slovenia), we can assume that in reality, the total value of translation and interpreting in Slovakia is higher than what was estimated in this study.

4.3.5.3. Conclusions

From the information that could be retrieved during the six months of the study, it becomes evident that data retrieval at European level for the sector of private language tuition is difficult. While we were able to retrieve some country-related information on both public and

private language teaching (see country fact sheets, page 191 and following), hardly any material consulted referred to financial information of any kind.

The data provided by the National Statistics Offices show that the turnover generated by private language schools and centres is in the region of 23% of the total turnover of translation and interpreting in Finland and 72% of the total turnover of translation and interpreting in Slovakia. Since these are the only financial figures available for the language teaching sector, they are the only basis of our estimates of the total volume of the sector.

The first conclusion we can draw is that within the language industry, the share of turnover of the language teaching sector is considerably higher in Eastern European countries compared to Western European countries.

We therefore assume that in all Western European countries the turnover of the language teaching sector is approximately 25% of the turnover of translation and interpreting. Given the unrealistically high percentage represented by the language teaching segment in Slovakia, we assume that the language teaching sector in Eastern European countries generates double the turnover generated by Western European countries. Hence, in all Eastern European countries, we assumed the turnover of the language teaching sector to be approximately 50% of the turnover of translation and interpreting. This is how we estimated the total turnover of language teaching activities in Europe at **1.6 billion €**.

Following the trend of increasing globalisation and consequent need for multilingual communication, we believe in the importance and the big potential of the language teaching sector. Further in-depth research is required in order to obtain some more reliable financial indicators as a basis for taking further action of support and active development of the sector.

4.3.6. Conference organisation

In the context of our study, we have contacted four associations of conference organisers to retrieve any data or statistics available. The only association replying to our request was the International Association of Professional Congress Organisers (IAPCO). Among the data provided we were sent the results of a survey conducted in 2008 by IAPCO among its members in order to identify the position of IAPCO members in the meetings marketplace[16]. Results refer to the entire world and describe the activity as a whole (IAPCO, 2009). The isolation of the proportion of activity attributable to interpreting services and systems is therefore only possible with speculative estimates.

According to the survey, the economic impact of conferences organised by IAPCO is estimated at 3.18 billion € worldwide (IAPCO, 2009). Since 85% of all meetings are managed by the European members of IAPCO with a total of 1.4 billion delegates (which represent 77% of total delegates) (figures taken from IAPCO website), we assume that the economic impact of

[16] www.iapco.org

conferences organised by European members could represent at least 75% of the total impact, resulting at 2.38 billion €. Out of this figure, our estimate of the amount attributable to organising multilingual support (interpreting including equipment) amounts to 5%. We also assumed that an additional approximate 25% of the value generated in the LSP and private individual market is generated in corporate environments by employees directly or indirectly responsible for multilingual data processing. The resulting total revenue for 2008 for conference organisation is therefore estimated to be **143 million €**.

As regards the financial crisis, IAPCO members anticipate a decrease of activity for 2009. However, the outlook for 2010 is positive again, with a steady increase in business for the future.

Due to its multilingual nature, and considering the increasing globalisation and consequent need for multilingual communication, we see strong potential of international conference organisation and meetings. We therefore believe it will experience a significant growth over the next five years.

4.3.7. Consultancy

In the time and framework available, it was impossible to identify consultancy activities separately. More detailed research would be required to separate consultancy activities from the other specific services provided within the sectors. The number of independent consultants in the language industry is small, we therefore assume that consultancy is mostly provided free of charge as part of the respective service offering.

4.4. Review of the language industry by country

In order to provide a thorough review of the language industry by country, we have compiled a fact sheet for every European Member State, containing

- Statistical information (e.g. year of entry into the EU, population, average salary levels…),
- the list of professional organisations contacted,
- information about the national statistics office,
- a list of the authorities contacted and whether they have provided any data,
- a list of the publications collected, divided by sector. In some cases, the main findings of the publications are summarised.

The complete set of country fact sheets, preceded by an explanatory fact sheet, can be found in Appendix XIII, page 191.

Due to the lack of reliable data on other sectors, the country fact sheets led to an estimate of the total turnover generated in Europe by the translation and interpretation sector only.

The following figure shows the estimates of the turnover generated by translation and interpretation for every European Member State.

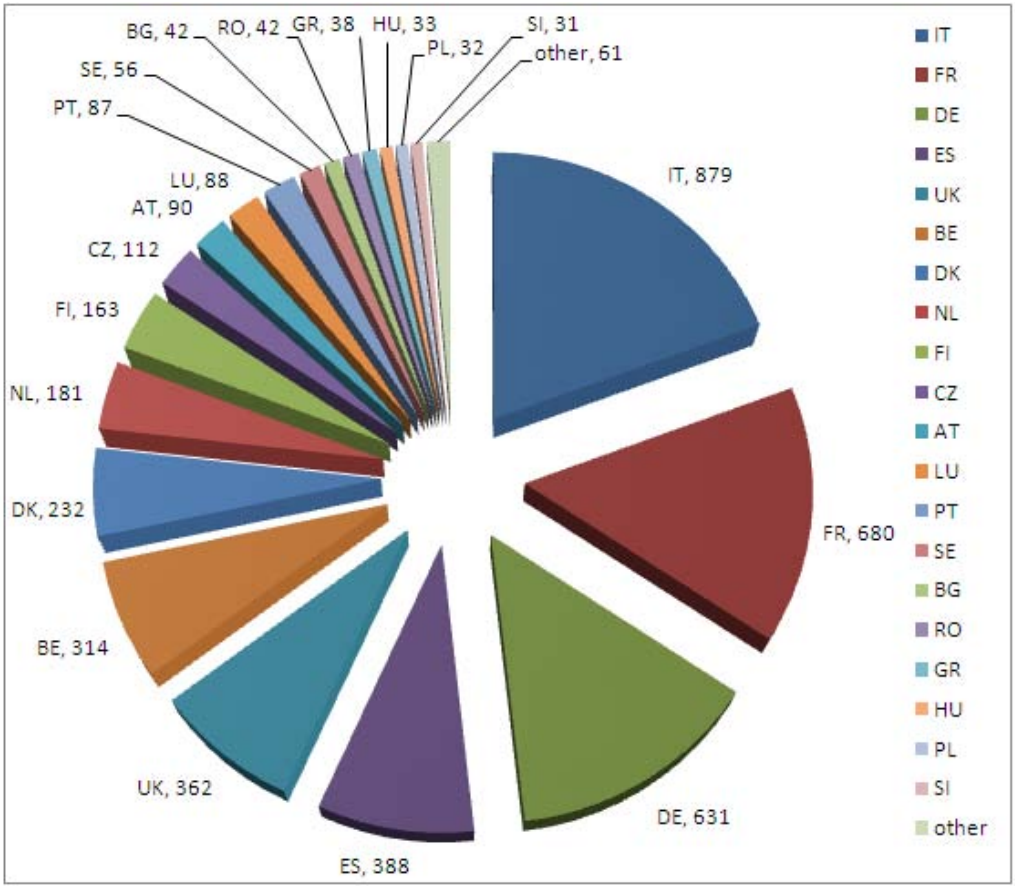

Figure 34 – Turnover (in million €) of translation and interpreting by Member State.

It is worth pointing out that no figures at all are available for Bulgaria, Cyprus, Estonia, Ireland and Latvia. In these cases, turnover figures were assumed to be equal to countries comparable in terms of working population and average income levels.

4.5. Analysis of socio-economic impact

As pointed out elsewhere in this study, the language industry will continue to grow considerably in the future, at an estimated conservative growth rate of 10% per annum.

A direct social impact of a growing European language industry is the increased exigency for multilingual communication, which needs to be reflected in language teaching strategies, offering appropriate and high quality foreign language learning opportunities already from childhood stage, as it becomes more and more difficult to master foreign language skills later in life. As the degree of specialisation within the language professions increases, this should be combined with technical skills and/or degrees.

From an economic viewpoint, the increasing need for multilingual communication is an incentive for many individuals to enter the language industry as professionals. As a matter of fact, as mentioned in several instances throughout the report, an increasing number of unskilled individuals are entering the profession due to low entry barriers. This was also one of the main points raised in the open-ended responses at the end of our questionnaire (see Appendix XI, Figure 82 page 181). In theory, this trend is a positive response to the increased demand for multilingual services Europe-wide. However, increasingly low quality levels are a serious threat to the profile of the language industry and clearly need to be tackled through regulations.

In order to reflect the highly skilled level of multiple competencies required in this profession, it is necessary to introduce appropriate payment and raise the overall image of linguists. Currently, this is low and therefore does not attract sufficient professionals.

This view is supported by the participants to our primary research: respondents perceive a low reputation of their profession and a lack of language competencies in general. There is a clear need of intervention at high level in order to counteract this trend. Secondary research confirmed these findings: the image of the language professions needs to be improved. Translation, for instance, is viewed as a commodity. In many cases, price takes precedence over quality. Companies do not view translation as a strategic element, they do not understand the full complexity of the process nor the negative economic impact of poor translation quality (EUATC, 2005).

Linguists need to be able to respond to this trend of growing competition and a steep increase in the demand for multilingual services. This leads to considerable growth in the development of linguistic and other tools specific to the language industry, supporting a small specialised linguistic community with highly specialised productivity tools.

The entire language industry is increasingly dependent on technology and – as a direct consequence – linguists either need to be technology savvy themselves or they need to be supported and guided by technology experts.

4.6. Market forecasts

The following table shows our estimate of the language industry for 2008, as well as forecasts until 2015.

	Total turnover (million €)							
	2008	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**
Translation and interpreting, software localisation and website globalisation	5 675	6 243	6 867	7 554	8 309	9 140	10 054	11 059
Language technology tools	568	624	687	755	831	914	1 005	1 106
Subtitling and dubbing	633	696	765	842	926	1 019	1 121	1 233
Language teaching	1 579	1 737	1 911	2 102	2 312	2 543	2 797	3 077
Conference organisation	143	157	172	190	209	229	252	278
Total	8 454	9 300	10 230	11 252	12 378	13 616	14 977	16 475

Figure 35 – LTC's estimate for 2008 and forecasts until 2015 of the value of the language industry. Average annual growth rate: 10%

Our estimate of the total value of the language industry amounts to **8.4 billion €** with a very conservative estimate of an average 10% growth rate over the next few years to result in a turnover of **16.5 billion €** minimum in 2015. This figure exceeds the forecast put forward by EUATC in 2006 of 6.43 billion € for 2010, as well as the forecasts provided by Common Sense Advisory, see Figure 36.

This is due to the fact that we estimated an additional 25% of language-related expertise in the corporate market. This remains to be confirmed based on further research. See also the beginning of section 4 (page 20).

Region	**Market Share**	**2009**	**2010**	**2011**	**2012**	**2013**
		US$ M	**US$ M**	**US$ M**	**US$ M**	**US$ M**
Europe	43%	6 468	7 331	8 409	9 703	10 781
U.S.	40%	6 074	6 884	7 896	9 111	10 123
Asia	12%	1 735	1 965	2 255	2 601	2 891
ROW	5%	722	818	939	1 083	1 203
Totals		**15 000**	**17 000**	**19 500**	**22 500**	**25 000**

Figure 36 – Projected Language Services Revenues for 2009-2013 in US$ millions. (Beninatto & Kelly, 2009). Average annual growth rate: 13.6%

As regards the impact of the financial crisis, some study participants report a slight decrease in turnover due to the economic downturn. This is especially true for small enterprises with turnovers below 50 000 €, while the impact of the crisis seems less incisive for larger-sized LSPs. The complete table of these findings can be viewed in Figure 79, page 164.

In line with these results, according to a survey conducted by the European Language Industry Association (ELIA) in 2009 about the impact of the financial crisis, only 25% out of 29

respondents report a significant decrease of turnover as a consequence of the recession (ELIA, 2009). A similar survey was published in June 2009 by the Globalization and Localization Association (GALA): while 83% of the Europe-based businesses report a direct impact by the financial crisis, 88% of the Europe-based respondents state that they did not have to dismiss any workers as a result of the financial crisis and – most importantly – the majority of European-based businesses stated that their revenues have stayed more or less the same in the last three months.

When asked about the estimated opportunities over the next years in terms of percentage change of turnover, the majority of respondents to our questionnaire estimate that their turnover will remain stable over the next year and two years. Over the next five years, an increase of turnover of up to 25% is envisaged while the forecasts get even more positive over the next 10 years, where the turnover is estimated to increase by 25% and above. The complete table with the responses provided as well as a graphic visualisation of the results can be viewed in Figure 80 and Figure 81, page 165.

According to Hollan (2008), the demand for language services is growing exponentially, e.g. the volume of documents that need to be translated is growing by 50% annually. Hollan concludes that the need is huge, the demand is big but since involved costs are high, the capacity is not fully exploited.

This confirms our own estimates of 10% of the market notwithstanding the financial crisis.

According to the EUATC study above mentioned, the financial crisis leads to a decline of 10% of the global turnover for 2009 compared to figures in 2008 (Boucau, 2009). This tendency will remain stable in 2010 (-5%) and 2011 and from 2012 the market will re-start to grow.

As Boucau seems the only source forecasting temporary decline, we have adopted the point of view that moderate growth is the more likely scenario.

4.7. Conclusions

As shown in Figure 34 (page 78), data collected during the six months of the project allowed us to estimate a figure for the total turnover of the language industry in Europe. However – as we pointed out several times throughout the report – these figures are highly speculative as few reliable studies and data exist.

For example, the detailed figures retrieved for Italy seem to indicate that estimates of the value of translation and interpreting in other countries are too low. The total turnover of the Italian translation and interpreting market was estimated to be between 781 million € and 976 million € according to the data provided by the national statistics office (see country fact sheet Italy). The estimated turnover of the German translation and interpreting market amounted to 631 million €, based on the data provided by the federal statistics office. Since Germany was the only country where freelancers were explicitly included in the statistics provided, we

assumed the figures to be accurately reflecting the current situation and no further adjustments were made. However, a comparison of these two countries shows that the figures retrieved for Italy are disproportionally large compared to Germany. Since it is rather unrealistic that the Italian statistics office delivered figures exceeding the actual value of the sector, we are led to assume that, in reality, the data provided by the German federal office for statistics did not include a portion of the market. This would mean that the actual figures for Germany are larger than estimated in this report, which can be assumed to be true for other Member States as well. This means that our estimated size of the language industry in Europe is probably even more conservative than the reality.

In order to be able to obtain data for every sector, we highlight the following countries as "best practice examples":

- As regards the sector translation and interpreting, **Belgium, Denmark, Estonia, Finland, Germany, Italy, Lithuania, Romania and Slovenia** are the countries that produced the most precise and hence reliable data in terms of number of *businesses* and *total turnover*, thanks to the data made available upon request by the National Statistics Offices (Belgium, Estonia, Finland, Germany, Italy, Lithuania, Romania and Slovenia) and the data publicly available on the website of the Statistics Office (Denmark). The Federal Office for Statistics of Germany delivered the most detail as regards the interpretation of the data provided (i.e. upon request, a detailed explanation of unclear terms was made available). Italy is the country that delivered by far the greatest detail as regards the number of *individuals* active in the sector, thanks to the data of the sector study conducted by the Italian revenue agency in 2004. Slovenia was the country that delivered *most recent data* by providing information about the year 2007, while the most recent year for all other countries was 2006.

- Concerning the sector subtitling and dubbing, the Ministry of Culture of the Republic of **Slovakia** was the only source providing very detailed information in terms of *hours of movie dubbing and subtitling* performed at the Slovak Television[17]. To be exhaustive, this information should ideally be completed with the amount of work performed for other clients in the country and cross-analysed with revenue data, which however is not currently available. The Danish Union of journalists (FBO) and the Italian Association of Audiovisual Script Translators and Adaptors (AIDAC) delivered most of the information retrieved on the sector.

- As regards the sector of private language tuition, Statistics **Finland** and INFOSTAT (the National Statistics office of **Slovakia)** provided accurate data about the number of language schools and the turnover. The National Statistics office of the **Czech Republic**

[17] Unfortunately, these figures were provided shortly before this report was finalised, hence they could not be included in the section about subtitling and dubbing.

provided detailed data about the number of courses per language taught and the number of students attending these courses. Meticulous information about institutional language tuition at all *compulsory school levels* was provided by the ÖSZ (Austrian Centre for language competency) for **Austria** and the National Institute for Education of **Slovakia**. Information about language tuition at *higher education levels* was provided comprehensively by the National Centre for Languages (CILT) of the **United Kingdom.**

- The sector of language technology tool development did not lead to satisfactory results in any Member State regarding information about the volume or value. The only study containing some information for a specific country was the technolangue study conducted in 2007 (technolangue, 2007) in **France**.

- As regards the sectors software localisation and website globalisation, conference organisation and consultancy, no relevant sources of information could be identified which allowed determining the volume and value in any of the Member States. This could imply that there simply is no relevant data which could have been made available by authorities, or no studies that were conducted which could lead to estimate of the volume and value of the sector in a specific country. On the other hand, it is possible that information is available but that it is only accessible through very specific channels, which we were not able to identify during the six months of the study. In addition, the activities covered by some of the sectors mentioned above are included in data covering other segments. For instance, we assume that consultancy in linguistic issues is often performed by service providers as integral part of their service offering and can therefore not easily be distinguished from that sector.

To sum up, data collection and analysis clearly led to the conclusion that information availability and retrieval vary dramatically across the language industry sectors and the Member States covered by the study.

For those sectors where information is available in some Member States (e.g. translation and interpreting and language teaching), we firmly believe that the same kind of data could be produced in the same format by the other Member States as well, leading to a solid base of comparison for more reliable market estimates.

4.8. Reports being prepared now

During the course of data collection, it emerged that some professional organisations and national and European authorities are in the course of compiling reports potentially relevant for the study.

4.8.1. Worldwide

Common Sense Advisory is currently updating "Finding the Elusive Translation Buyer", a research – conducted in 2004 – which profiles the "typical" buyer based on a survey with sales representatives from language service providers (LSPs). Users of translation, localisation and interpretation services are invited to participate.

4.8.2. Country independent

A publication on the economics of the multilingual workplace is in preparation, based on research carried out in Switzerland (**LEAP** study) where algorithms for the economic dimension and impact of multilingualism on overall economic performance are developed. This research needs to be examined thoroughly to see whether the actual and the required size of the language industry can be derived from overall economic indicators, taking into account questions such as the influence of multilingual competence on productivity in all areas of economic performance, such as sales and marketing, procurement, etc., not only for export oriented companies but also for companies operating within one language region only.

4.8.3. Europe

We were informed that **Eurostat** has some data on how adults see their language skills (self assessment, data from the Adult Education survey). However, the data is not yet published but will be shortly. Eurostat is also trying to prepare another publication on this kind of information for the International Day of Languages which is at the end of September.

4.8.4. France

A study on the uses and applications of language technology is being conducted by the French **Ministry of Culture and Education, Department of Studies, Prospective and Statistics (DESP)**. The study will take into account the international dimension of economic and cultural issues related to language technologies, with a particular focus on Europe.
The objective of the study will be to:

- get to know the applications of language technology in some areas identified as: European digital library, scientific publications and circulation of knowledge and circulation of works (literature, performing arts ...), dubbing and subtitles, interpreting, ...
- Knowing the tools necessary to develop these applications: translation, synthesis from text, voice recognition, search engines, character recognition, spelling correction, support for people visually or hearing impaired ...
- Identify needs in terms of language resources: corpora, lexicons, dictionaries, terminological databases.

- Identify needs in terms of software resources: data processing, standards for the broadcast, compatibility of inter-language.

4.8.5. Germany

In Summer 2009, the **German Federal Association of Interpreters and Translators (BDÜ)** will publish a report about data referring to the translation and interpreting market in Germany in 2007.

4.8.6. Spain

The **Professional Association of Translators and Interpreters of Catalonia (APTIC)** is currently designing a survey about real pricing among its members.

4.8.7. United Kingdom

As a contribution towards a policy that promotes multilingualism, the **Office for National Statistics** (UK) have recognised the demand for information on the linguistic diversity of the UK. A language question will be included in the Census 2011 (CILT, 2009).

5. Report limitations

As mentioned in many places within this study, the main limitation of our report is represented by the little availability of reliable data at the level of European and national authorities: many statistics offices and other authorities were unable to produce the information requested. Undoubtedly, the transition from the national classification system NACE Rev. 1.1 to NACE Rev.2 plays a significant role as regards for instance the sector "translation and interpreting". However, other factors such as reporting methods within the single countries and levels of detail of data stored are to be taken into account as well.

In addition, data provision proved to be unsatisfactory at the level of professional associations. Although a large number of reports were retrievable, only few of these provided usable statistics for the purpose of this study. Many are based on small samples and do not thoroughly explain the study methodology, hence the representativeness of these publications may be questioned.

For some sectors such as software localisation and website globalisation, language technology tool development, conference organisation and consultancy, no data at all could be retrieved through authorities and in the case of consultancy and software localisation and website globalisation we could not find data at professional organisations either. This lack of publicly available information leads to an objective difficulty in presenting thorough results that can be put into the context of a broader picture comprising the language industry as a whole, and used for future studies as a reference.

Regarding our primary research, the sample size was initially set at 250 LSPs but eventually the survey led to four times as many responses that were included in the analysis. This high number of respondents is representative for the European language industry as a whole and the single sectors, but cannot be used to put forward estimates of the size of the market without support from reliable statistical data. As regards the single countries, the number of respondents per country ranged from 111 in Spain to 2 in Cyprus. In order for the dataset to be representative enough to draw country specific conclusions, the number of respondents per each country should be increased substantially.An additional limitation that needs to be addressed in the context of this study is related specifically to the sector of language teaching. Our estimates of this market are the most speculative, because the only financial data that could be retrieved by official sources were from Finland and Slovakia (see section 4.3.5, page 71). We used these figures to arrive at a value of the language teaching sector for all European countries, estimating a higher need for Eastern European countries than Western Europe. This is, of course, highly questionable and only shows the need for more reliable data gathered by official sources. The language teaching market needs to be properly assessed with the greatest urgency, as today's children will be tomorrow's linguists.

6. Recommendations

1. As mentioned under "report limitations", one limitation – and finding – that distinctly and repetitively emerged is that the language industry is missing standards as regards data registration and publication. This issue became apparent not only from our personal experience during data collection, but also from reports consulted as part of the desk research (e.g. Boucau, 2009). It is of utmost importance to introduce such standards and we are confident that the benefits would be manifold. A standardised reporting method would allow snapshots of the industry at any time, which directly translates into shorter reaction times should any type of political or other intervention be required. In addition, standardised information ensures accuracy, reliability and – above all – comparability of data, at all levels (from European to national). On the basis of our expertise and the knowledge acquired through this project, we recommend that action be taken at a high level within the European Commission, especially liaising with national and European authorities resulting in consistent and standardised information provided about the language industry and all sectors within it across Europe.

   Germany presents a special case because of its *Länder* who are responsible - among other things – for the German education system (see section 4.3.5, page 71). All 16 *Länder* were contacted with the request to provide statistics about the language teaching sector. However, due to the diversity in data provided, it was not possible to estimate the value or volume of this sector in Germany. The provision of consistent and comparable data across the *Länder* would allow obtaining a unified national picture which could then be used at European level for studies similar to this.

2. While some authorities were unable to produce the data requested, five authorities required payment for providing information. Due to the restricted timeframe of the project, further negotiations with these authorities were abandoned. However, we suggest that these data should be obtained and included in future studies. In addition, we believe that data provision should be equal across Member States, not only in terms of standards of data collection and distribution, but also in terms of charges applied. For example, data should be provided free of charge for political planning purposes.

3. Despite the multilingual resources available in our team, it was decided to publish the questionnaire of the primary research in English only. This restriction was imposed by the limited timeframe of the study, as a multilingual survey would have implied major complexity both during the questionnaire development and in the data analysis phase. Future studies building on the solid basis provided in our work should be based on multilingual primary research.

4. As mentioned under the report limitations (chapter 5, page 86), in a potential follow-up study country-specific surveys should be conducted with a larger number of responses per

Member State (at least 100-250, possibly lower for the smallest countries). In addition, deeper insights into single sectors (for instance language teaching, subtitling and dubbing and conference organisation) should be obtained by developing detailed sector-specific surveys, aiming for at least 250 responses per sector across Europe.

5. In addition to targeting specific sectors in more detail, a further recommendation for future research concerns the corporate sector. Many linguists and staff performing multilingual tasks are employed in large multinational corporations, in international organisations and in public authorities, where not all linguistic and language related tasks are outsourced. The very rough estimate of this proportion of the language industry provided in this study needs to be addressed more systematically, confirmed and if necessary modified.Due to its international nature, the language industry is characterised by a high degree of dynamism. The growing globalisation and consequently an increasing need for multilingualism will keep the language industry thriving and vibrant in the future. The rising demand for multilingual products and services requires proper planning at political and commercial levels in order to monitor and strengthen Europe's leading international position within the language industry. Therefore, regular reporting is required to reflect current and future requirements and trends. A wealth of material was gathered in the course of this study. In order for a potential future study to refine the results of the current work done, it is certainly worthwhile exploring some of these materials in more depth. Besides, a number of highly relevant studies are currently in preparation (see 4.8, page 83), these should be used on publication to verify and where necessary update this study.In line with the tender specifications, the present report is mainly focussed on the European Union Member States and their activity within the EU. In order to get a picture as complete as possible, which is crucial to obtain a thorough understanding of the main underlying forces and dynamics of the industry, the relative significance of the language industry in Europe compared to the rest of the world should be analysed in more detail in a future report, confirming the leading role of Europe within the language industry.

6. This study does not aim to provide a perfectly complete overview of eight sectors of the language industry within 27 Member States. Within the timeframe available, data collection and analysis was maximised, and significant conclusions and recommendations were drawn. However, we are sure that additional valuable information can be provided by knowledgeable readers of this report. We therefore encourage a certain element of crowd-sourcing and joint efforts by interested parties, facilitated by the web based application made available as a deliverable of this report. This knowledge base should be extended to contain a "supplier" interface where knowledgeable suppliers can upload additional information.

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Appendix I – Summary of effort

According to the tender specifications, this project had an estimated value of 6 person/months for a total of 120 days. Despite our initial estimate of 8 person/months (or 160 days), the actual time and effort dedicated to the project so far exceed this figure considerably. As a matter of fact, the resources allocated so far by LTC include a team of nine researchers and developers.

Project supervision:	Dr. Adriane Rinsche
Project coordination and data analysis:	Nadia Portera-Zanotti
Research support:	Nadine Graf
	Susann Stein
	Daniela Salinas
	Sylwia Starzec
	Carmen Cameron
Database coordination:	Paulo Serra
	Bilal Khan

The scope of the project is very broad. In order for the results to be of real value and use for the DGT, the European Commission and possibly the general public, the effort of 6 person/months estimated by the DGT as per tender specifications was extended more than three-fold at LTC's expense.

Appendix II – Coding systems of national statistics offices across the EU

	NACE code	National code	Description of code
Austria	NACE 1.1	ÖNACE 2003	
Belgium	NACE 1.1	NACE-BEL	
Bulgaria	NACE 2	NACE.BG 2008	
Cyprus	NACE 2		
Czech Republic	NACE 2	CZ-NACE	
Denmark	NACE 2		
Estonia	NACE 2	EMTAK 2008	EMTAK (Estonian Classification of Economic Activities)
Finland	NACE 2		
France	NACE 1.1	NAF	
Germany	NACE 1.1		
Greece	NACE 2		
Hungary			
Ireland			
Italy	NACE 1.1	ATECO 2002	
Latvia			
Lithuania			
Luxembourg			
Malta			
Netherlands	NACE 1.1		
Poland	NACE 1.1	PKD	PKD (Polish Classification of Activities)
Portugal	NACE 1.1	CAE 2.1	CAE (Nomenclatura Portuguesa das Actividades Económicas)
Romania		CAEN 2	
Slovakia	NACE 1.1		
Slovenia	NACE 1.1		
Spain		CNAE 93 Rev.1	
Sweden			
United Kingdom	NACE 1.1	UKSIC(2003)	UKSIC (UK Standard International Classification)
NACE (*Nomenclature générale des activités economiques dans les Communautés européennes* – Statistical Classification of Economic Activities in the European Community)			

Figure 37 – Coding systems of national statistics offices across the EU. Sources: websites of statistics offices.

Appendix III – Questionnaire for LSPs

intro

Thank you for taking the time to participate in this study about the size of the language industry in Europe.

The survey is carried out under the Code of Conduct of the Market Research Society and the Code of Practice of the ICC (International Chamber of Commerce) and ESOMAR (World Association of Opinion and Marketing Research Professionals). Data obtained through the questionnaires will be treated in strict confidence in accordance with the terms of the Data Protection Act 1998, used for statistical purposes and published in aggregated form only. Unless specifically authorised by the respondents, no data disclosing information that could lead to the potential identification of single respondents will be released.

The survey will take approximately between 15 and 20 minutes.

In order to progress through the questionnaire, please use the following navigation links:

- Click the "Next" button to continue to the next page (responses will be saved).
- Click the "Previous" button to return to the previous page (responses will be saved).
- Click the "Submit" button to submit your survey.

If you would like additional information about the questionnaire please contact Nadia Portera-Zanotti at nadia.portera-zanotti@langtech.co.uk or +44(0)20 8549 2359 (ext. 214)

screener

Please select what category your company belongs to.

- ◯ Individuals and small enterprises (up to 10 employees)
- ◯ Larger-sized language service providers (more than 10 employees)
- ◯ Language service departments: corporate, institutional, governmental

M3

Please provide the following details.

Name of language service provider

Year of establishment

Name of contact person for this questionnaire

E-mail address

Phone number

In what region is your company headquartered?

- ◯ European Union (EU) Member State
- ◯ Europe outside the EU
- ◯ USA & Canada
- ◯ Rest of World (please specify)

In which of the following EU Member States is your company headquartered (if applicable)?

	EU Member State
Headquarters	

Which of the following certifications do you have?

- ☐ None
- ☐ ISO 2001
- ☐ EN 15038
- ☐ Other (please specify)

Please list your professional affiliations below.

Does your company have any subsidiaries?

- ◯ Yes
- ◯ No

M5

Please indicate the number of subsidiaries for each region or state.

Europe outside the EU	
USA & Canada	
Rest of World	
Austria	
Belgium	
Bulgaria	
Cyprus	
Czech Republic	
Denmark	
Estonia	
Finland	
France	
Germany	
Greece	
Hungary	
Ireland	
Italy	
Latvia	
Lithuania	
Luxembourg	
Malta	
Netherlands	
Poland	
Portugal	
Romania	
Slovakia	
Slovenia	
Spain	
Sweden	
United Kingdom	

M6

Which of the following language-related activities does your company currently perform? If applicable, please distinguish between the branches of your business within the Member States of the European Union ("EU") and the branches in the rest of Europe ("Non-EU").

	EU	Non-EU
Translation (including literary translation)	☐	☐
Interpreting (on-site and by telephone, including sign language interpreting)	☐	☐
Subtitling and dubbing	☐	☐
Software localisation & website globalisation	☐	☐
Language technology tools development	☐	☐
Organisation of international conferences with multilingual requirements	☐	☐
Language teaching	☐	☐
Consultancy on linguistic issues and/or multilingual questions	☐	☐

Please state any other activity that you perform that is not included in the previous question.

M7

For each of the following language activities, please state the exact services provided. If applicable, please distinguish between the branches of your company within the Member States of the European Union ("EU") and the branches in the rest of Europe ("Non-EU").

Translation

	EU	Non-EU
(Multilingual) terminology generation and management	☐	☐
Human translation (HT)	☐	☐
Computer-assisted translation (CAT)	☐	☐
Machine translation (MT)	☐	☐
Post-edition, revision, quality control	☐	☐

Type of interpreting

	EU	Non-EU
Whispered (chuchotage)	☐	☐
Simultaneous	☐	☐
Consecutive	☐	☐
Telephone interpreting	☐	☐
Sign interpreting	☐	☐

Interpreting by customer type

	EU	Non-EU
Commercial interpreting	☐	☐
Community interpreting	☐	☐

M8

Please state the number of employees. If applicable, please distinguish between the branches of your company within the Member States of the European Union ("EU") and the branches in the rest of Europe ("Non-EU").

	Between 10 and 49 employees	Between 50 and 249 employees	250 and more employees
EU	◯	◯	◯
Non-EU	◯	◯	◯

Please estimate the number of freelancers and subcontracting companies REGULARLY used by your offices within the EU and outside the EU, if applicable.

Freelancers (EU) ☐

Freelancers (Non-EU) ☐

Subcontracting companies (EU) ☐

Subcontracting companies (Non-EU) ☐

Where are your FREELANCERS mainly located? Please state your best estimate of the percentage according to each state or region.

European Union (EU) Member States (%) ☐

Rest of Europe (Non-EU) (%) ☐

Rest of World (%) ☐

Where are your SUBCONTRACTORS mainly located? Please state your best estimate of the percentage according to each state or region.

European Union (EU) Member States (%) ☐

Rest of Europe (Non-EU) (%) ☐

Rest of World (%) ☐

M9

What is your best estimate of the breakdown of the workload from your offices within the EU across the three groups shown?

Translation services (if applicable)?

Employees (%)

Freelancers (%)

Subcontracting companies (%)

Interpreting services (if applicable)?

Employees (%)

Freelancers (%)

Subcontracting companies (%)

Subtitling and dubbing services (if applicable)?

Employees (%)

Freelancers (%)

Subcontracting companies (%)

Software localisation & website globalisation services (if applicable)?

Employees (%)

Freelancers (%)

Subcontracting companies (%)

Language technology tools development (if applicable)?

Employees (%)

Freelancers (%)

Subcontracting companies (%)

Organisation of international conferences with multilingual requirements (if applicable)?

Employees (%)

Freelancers (%)

Subcontracting companies (%)

Language teaching (if applicable)?

Employees (%)

Freelancers (%)

Subcontracting companies (%)

Consultancy on linguistic issues and/or multilingual questions (if applicable)?

Employees (%)

Freelancers (%)

Subcontracting companies (%)

Other activities (e.g. admin, layout, etc...) (if applicable)?

Employees (%)

Freelancers (%)

Subcontracting companies (%)

M10 - finance

Please state the most recent financial year end date for which annual accounts were finalised.

	DD	MM	YYYY
End of financial year	/	/	

Please provide the total turnover of your company generated by the branches of your business for the above year inside and outside the European Union (EU).

	Up to € 100 000	Between € 100 000 and € 500 000	Between € 500 000 and € 2 million	Between € 2 and 10 million	Between € 10 and 50 million	Above € 50 million
EU	○	○	○	○	○	○
Non-EU	○	○	○	○	○	○

If the currency of your state is not the EURO, please provide your currency and the exchange rate used for the purpose of this questionnaire.

Currency

Exchange rate (€ 1.00 = ...)

Please provide a rough estimate of the share of turnover (in %) generated by the following language related activities offered by your company in Europe.

Translation (including literary translation) (%)

Interpreting (on-site and by telephone, including sign language) (%)

Subtitling and dubbing (%)

Software localisation & website globalisation (%)

Language technology tools development

Organisation of international conferences with multilingual requirements (%)

Language teaching (%)

Consultancy on linguistic issues and/or multilingual questions (%)

Other goods and services (%)

M11 - languages

What language groups does your company currently cover? If applicable, please refer to the branches of your company within the European Union Member States only.

- ☐ EU official languages
- ☐ Other European languages
- ☐ Asian languages
- ☐ Russian
- ☐ Arabic
- ☐ African languages
- ☐ Other (please specify)

What are the top 5 languages (or language combinations) offered by your company? If applicable, please refer to the branches of your company within the European Union Member States only.

	Source	Target
Language (combination) 1		
Language (combination) 2		
Language (combination) 3		
Language (combination) 4		
Language (combination) 5		

Other language (combination): please specify

For each language (or language combination) listed above, please select the type of language activity offered.

	Translation	Interpreting	Subtitling and dubbing	Software localisation & website globalisation	conference organisation	Language teaching
Language (combination) 1	☐	☐	☐	☐	☐	☐
Language (combination) 2	☐	☐	☐	☐	☐	☐
Language (combination) 3	☐	☐	☐	☐	☐	☐
Language (combination) 4	☐	☐	☐	☐	☐	☐
Language (combination) 5	☐	☐	☐	☐	☐	☐

Please state the percentage of turnover generated by each language (or language combination).

% of turnover generated by language (combination) 1

% of turnover generated by language (combination) 2

% of turnover generated by language (combination) 3

% of turnover generated by language (combination) 4

% of turnover generated by language (combination) 5

% of turnover generated by other language (combination), as stated above

M12 - clients

How many clients do you currently have in total?

- ◯ 1-100
- ◯ 101-500
- ◯ More than 500

Where are your clients mainly located? Please state your best estimate of the percentage according to each state or region.

European Union (EU) Member States (%) ☐

Europe outside the EU (%) ☐

Rest of World (%) ☐

What is your best estimate of the percentage of clients headquartered in the EU for each of the following types?

Commercial Buyers of language services (%) ☐

International Institutions (%) ☐

Government bodies (%) ☐

Other (%) ☐

If you work for clients that have their own in-house language service department (LSD), please specify for the biggest five: the industry sector and your best estimate of the size of their language service department.

	Industry Sector	Size
1st LSD:		
2nd LSD:		
3rd LSD:		
4th LSD:		
5th LSD:		

What are the fields of expertise most in demand among your clients?

- [ ] Business, Finance and Marketing
- [ ] Legal and Patents
- [ ] Health and Medical
- [ ] IT: Hardware, Software etc...
- [ ] Technical and Engineering
- [ ] Scientific
- [ ] Education
- [ ] Art and Literature
- [ ] Social Sciences
- [ ] Other (please specify)

SM 13 - LTT

For the following language technology tools, please specify the name(s) of the product(s) you mainly use, if applicable.

Translation memory tools

Terminology tools

Localisation tools

Translation management systems

Business information systems specific to the language industry

Controlled language tools

Electronic dictionaries

Machine translation systems

Language training software (desktop and web-based)

Conference and telephone interpreting systems

Combined offerings and open systems (please state type of product as well as the name)

If applicable, please select which tools you develop in-house.

- [ ] Translation memory tools
- [ ] Terminology tools
- [ ] Localisation tools
- [ ] Translation management systems
- [ ] Business information systems specific to the language industry
- [ ] Controlled language tools
- [ ] Electronic dictionaries
- [ ] Machine translation systems
- [ ] Language training software (desktop and web-based)
- [ ] Conference and telephone interpreting systems
- [ ] Combined systems and open systems (please specify)

Please provide a rough estimate of the amount (in EUROS) that you have invested in language technology tools to date and the likely amount you will be investing within the next 5 years.

Past investment in in-house development (€)

Past investment in off-the-shelf purchase (€)

Future investment in in-house development (€)

Future investment in off-the-shelf purchase (€)

Please state what kind of commercial language technology tool you are most likely to invest in.

First priority	
Second priority	
Third priority	

If your choice is not included in the list, please specify

SM 14

How has the recent financial crisis impacted your company in terms of estimated change of turnover?

Increase of turnover (%)

OR decrease of turnover (%)

How do you see your opportunities over the next years in terms of percentage change of turnover? Please provide a rough estimate.

	Significant decrease by 25% and more	Slight decrease of up to 25%	Stability(no change)	Slight increase of up to 25%	Significant increase of 25% and above
1 year	○	○	○	○	○
2 years	○	○	○	○	○
5 years	○	○	○	○	○
10 years	○	○	○	○	○

Are you aware of recent mergers and acquisitions among language service providers? If yes, what were the main reasons in your opinion?

- ☐ To increase market share
- ☐ To eliminate competition
- ☐ To increase expertise
- ☐ To be able to decrease prices
- ☐ To increase performance
- ☐ To diversify (enter a new industry)
- ☐ Other (please specify)

In your opinion, how will the language industry develop in the future and why?

Do you have any additional comments you would like us to include in the report? Please provide them here.

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The final report handed to the Directorate General for Translation of the European Commission will include a comprehensive list of all contributors to the study. Do you wish the name of your entity, your country and your contact e-mail address to be included in this list?

- ◯ Yes
- ◯ No

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You have now reached the end of the survey, thank you very much for your time and your contribution.

If you would like additional information about the questionnaire please contact Nadia Portera-Zanotti at nadia.portera-zanotti@langtech.co.uk or +44(0)20 8549 2359 (ext. 214)

Appendix VII – Ranking of top 30 language service providers worldwide

Rank	Company	HQ Country	Revenue in US$M	Employees	Offices	Status
1	Global Linguist Solutions, LLC*	US	691.00	6500	6	Private
2	Lionbridge Technologies	US	461.00	4500	40	Public
3	L-3 Communications (LOTS)	US	434.59	1049	1	Public
4	SDL International	UK	294.54	1981	55	Public
5	Language Line Holdings	US	212.64	4719	7	Private
6	TransPerfect / Translations.com	US	204.77	1115	56	Private
7	STAR Group*	CH	164.83	910	42	Private
8	SDI Media Group	US	140.00	800	1	Private
9	Purple Communications, Inc.	US	130.08	577	5	Public
10	euroscript international S.A.	LU	129.03	1267	32	Private
11	Xerox Global Services*	UK	113.74	506	9	Public
12	RWS Holdings PLC	UK	106.76	451	12	Public
13	CLS Communication	CH	57.62	360	14	Private
14	Manpower Business Solutions	NL	55.91	150	7	Private
15	Semantix A/B	SE	53.26	160	10	Private
16	Logos Group	IT	50.22	135	17	Private
17	thebigword Group	UK	49.90	270	9	Private
18	Welocalize, Inc.	US	49.86	402	12	Private
19	AAC Global Corporation	FI	48.99	304	14	Public
20	Moravia Worldwide	CZ	42.80	446	12	Private
21	Honyaku Center Inc.	JP	42.68	193	7	Public
22	Jonckers Translation & Engineering s.a.	BE	37.21	280	13	Private
23	hiSoft Technology International Ltd.	ZH	35.10	926	16	Private
24	HP ACG	FR	30.06	150	9	Public
25	Merrill-Brink International	US	30.02	100	4	Private
26	Crestec, Inc.	JP	28.56	511	22	Private
27	CBG Konsult AB	SE	28.54	180	9	Private
28	VistaTEC Ltd.	IE	27.23	102	5	Private
29	Telelingua Group	BE	21.98	135	5	Private
30	SEPROTEC Translations	ES	20.12	358	15	Private

Figure 38 – Ranking of top 30 LSPs worldwide. Source: (Beninatto & Kelly, 2009)

Appendix X – Page relating to DGT study on LTC homepage

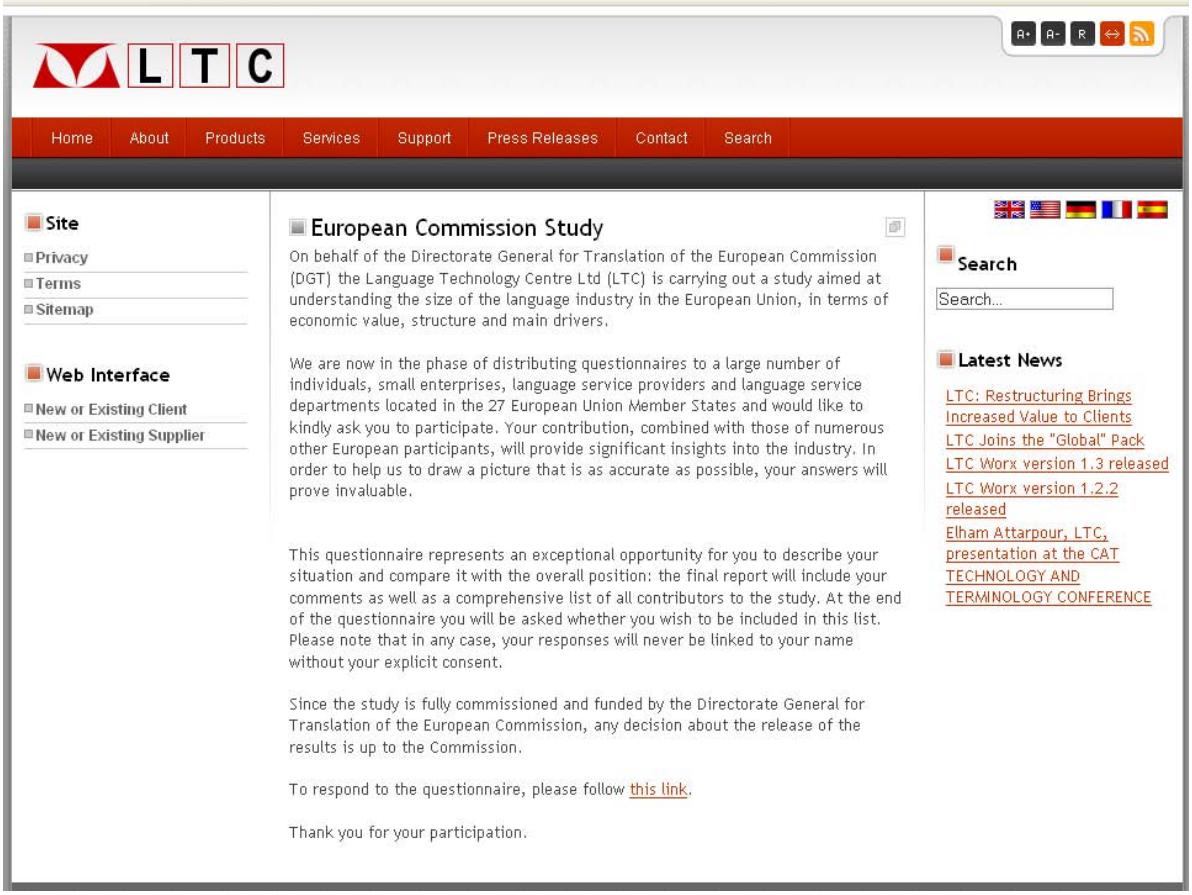


Figure 42 – Page relating to DGT study on the LTC homepage

Appendix XI – Results of primary research

All findings in this section refer to respondents pertain to the first two target groups (LSPs and individuals and small enterprises). The total number of suitable respondents amounts to 1103, as explained in the Methodology section of this report. Responses from language service departments were listed and can be analysed in a separate study.

1. Activities performed

The question **"which of the following language-related activities does your business/company currently perform?"** was part of the compulsory questions and therefore answered by all 1103 respondents. Respondents were allowed to select more than one activity, hence the total number of responses does not add up to 1103.

A distinction was made between activities of European businesses inside and outside the EU. For instance, if an LSP has three subsidiaries outside the EU, we wanted to know which types of activity are relevant within and which one outside the EU. The activities are listed according to the number of respondents.

Type of activity	EU	Non-EU
Translation (including literary translation)	952	158
Software localisation & website globalisation	421	87
Interpreting (on-site and by telephone, including sign language interpreting)	378	66
Consultancy on linguistic issues and / or multilingual questions	284	50
Language teaching	245	46
Subtitling and dubbing	184	43
Organisation of international conferences with multilingual requirements	65	24
Language technology tool development	76	22

Figure 43 – Activities performed

Out of the total respondents, 339 individuals stated that they perform other activities not named in the list above. The total list of responses – sorted alphabetically – is presented below.

Alignment	Back translation
Art direction and design, naming and branding	Business development and services
Articles and manuals	Camp organisation, Language courses for specific needs of migrating people
Audio and voice transcription, audio and video translation	Commercial business
Author of dictionaries	Communication advice

Company communication

Comprehensibility studies and usability studies
Computer Aided Translation (CAT) tools teaching

Consultancy
Consultancy and projectmanagement on EU funding policy (VI and VII Framework)
Consultancy in translation technology procedures
Consultancy on and renting out of conference equipment (interpreter's booths, microphones, headsets etc.)
Continuing professional development for translators

Copyediting

Copywriting

Creation of customized dictionaries

Creation of Material Safety Data Sheets
Cross-cultural collaboration management consulting services

Cross-cultural training

Design and multilingual layout
Development of software for events, electronic interactive voting, added-value reporting writing
Distribution of CAT-Tools and Project Management Systems

Document and content management

Document and Data processing

Documentation

DTP

DTP for translated materials only

Economist

Editing and typesetting of literary translations

Editing back translations
Editing of English texts written by non native speakers

e-Learning

Engineering

English language teaching methodology

English texting for industrial communications

Evaluation of translation tests

Examination and assessment

Foreign language surveys

Foreign language typesetting

Ghost writing

Graphic service
Helping particulars and countries to establish in other countries (administrative and cultural aid)

Information design
Information on Notary authentication, Apostille Regime, immigration process
Information search for customers on the Internet

Intercultural trainings

Intercultural, cross language communication

Intermediary
Intermediation of notarization services for translated documents

International business matchmaking

Internet marketing

Interviews in English (job positions)

IT-consultancy

Journalism – blogging

Journalism – broadcasting

Language student counselling

Language study abroad

Law teaching
Lecturing and teaching (college and university level)

Linguistic testing
Lobbying at EC level (represent the European feed additives industry)

Localisation testing

Long distance translation teaching

LQI for other clients
Machine translation as a service, terminology extraction as a service, document maps
Making and updating terminological databases and translation memories

Man-power leasing
Marketing, marketing materials, marketing research

Materials writing for MA translation courses

Mediation

Mentoring of translators

Multilingual content production

Multilingual DTP

Multilingual recruitment
Multimedia localization, e-learning materials localization

Note-taking & delivery of minutes
Organisation of specialized seminars for financial translators
Organisation of teams of interpreters and, if required, provision of the relevant equipment

Organisational consulting, process consulting

Organising language study tours

Post-editing machine translation

PR consultation

Presentations

Printing and distribution

Project management

Proofreading

Providing technical equipment for interpreting

Publication

QA testing, software testing

Quality analysis

Recruitment
Research and consultancy on translation services for government departments

Research on translation

Reseller of CAT tools

Review

Reviews and assessments of translated texts

Revision of translations
Secondment of translators, recruitment of translators

Secretariat

Selling language technology tools

Seminars on the new German spelling
Set a code of good practices in several languages for the feed additive industry

Sign Language interpreter training programme

Soft Skills Training in English and Czech

Software development

Speaker

Special Educational Needs / Speech and Language Therapy in English

Speech to text transcription

Summarising

Supplier of European DVDs and books

Teaching and training interpreters

Teaching translation
Technical Communication (including writing in multiple languages)

Technical writing

Television programmes monitoring

Terminology extraction

Terminology generation and management

Terminology research, glossary creation

Terminology work

Text adaptations
Tourism, guest service, transfers, hotel booking, excursions, Tour guiding, etc.

Trade facilitation

Training for language providers

Training in Localization/CAT tools

Transcription

Transcription of oral interviews

Translation memory creation and handling
Translation teaching (university) and continuous professional training courses

Tutoring MA students

Typesetting and printing
University Counselling – Press Office and Public Relations (Cinematographic Field)

Virtual assistance

Voice-overs

Web / Online research

Web design for multilingual sites

Web development

Writing workshops

Figure 44 – Other activities performed

The following graph shows the services provided, divided by country. Answers are weighted according to the range of turnover of the respondents.

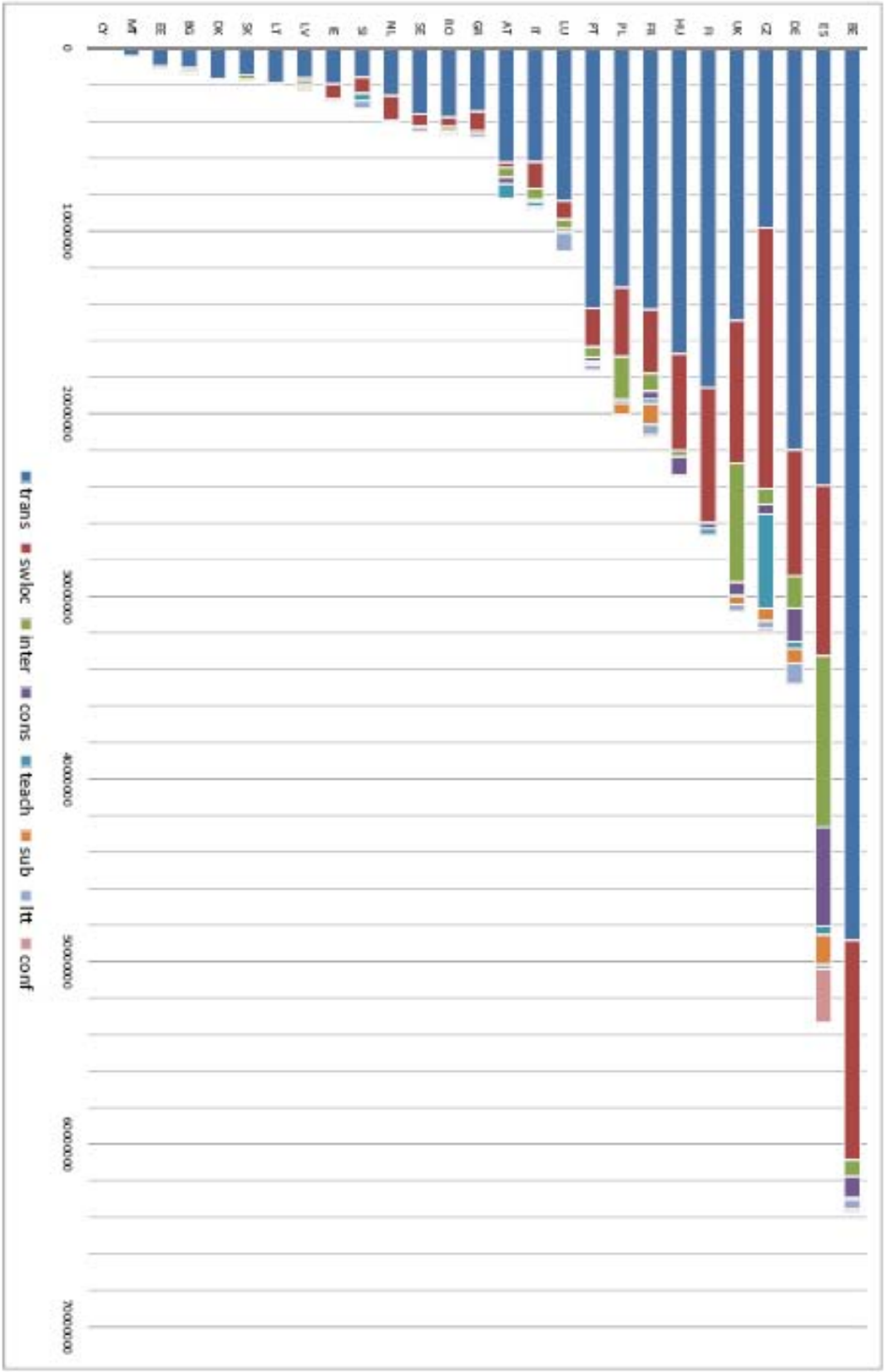


Figure 45 – Services provided by country.

For those respondents stating that they performed translation and interpreting services, we asked for the exact services provided. This question was answered by a total of 1052 individuals. A distinction was made between businesses located within the EU and businesses located outside the EU. Answers are summarised in the table below.

	EU	non-EU
Translation		
Human translation (HT)	838	140
Post-edition, revision, quality control	748	121
Computer-assisted translation (CAT)	679	107
(Multilingual) terminology generation and management	440	91
Machine Translation(MT)	88	27
Type of interpreting		
Consecutive	380	68
Simultaneous	264	50
Whispered (chuchotage)	230	33
Telephone interpreting	195	44
Sign interpreting	29	11
Interpreting by customer type		
Commercial interpreting	392	76
Community interpreting	199	49

Figure 46 – Exact services provided

2. Geographic location

Out of all 1103 respondents, 89% were located in a European Union Member State.

Region	Number of respondents	Proportion out of total
European Union (EU) Member State	982	89.0%
Rest of World	49	4.4%
Europe outside the EU	42	3.8%
USA & Canada	30	2.7%
	1103	

Figure 47 – Location of respondents

The detailed breakdown of the number of respondents per Member State can be viewed in the table below. On the left-hand side, data is sorted alphabetically by country and on the right-hand side it is sorted by number of respondents.

Region	Number of respondents	Proportion out of total
Austria	71	7.2%
Belgium	29	3.0%
Bulgaria	24	2.4%
Cyprus	2	0.2%
Czech Republic	28	2.9%
Denmark	26	2.6%
Estonia	11	1.1%
Finland	11	1.1%
France	97	9.9%
Germany	102	10.4%
Greece	17	1.7%
Hungary	13	1.3%
Ireland	14	1.4%
Italy	76	7.7%
Latvia	6	0.6%
Lithuania	6	0.6%
Luxembourg	5	0.5%
Malta	3	0.3%
Netherlands	48	4.9%
Poland	27	2.7%
Portugal	102	10.4%
Romania	38	3.9%
Slovakia	13	1.3%
Slovenia	11	1.1%
Spain	112	11.4%
Sweden	16	1.6%
United Kingdom	74	7.5%
Total	**982**	

Region	Number of respondents	Proportion out of total
Spain	112	11.4%
Germany	102	10.4%
Portugal	102	10.4%
France	97	9.9%
Italy	76	7.7%
United Kingdom	74	7.5%
Austria	71	7.2%
Netherlands	48	4.9%
Romania	38	3.9%
Belgium	29	3.0%
Czech Republic	28	2.9%
Poland	27	2.7%
Denmark	26	2.6%
Bulgaria	24	2.4%
Greece	17	1.7%
Sweden	16	1.6%
Ireland	14	1.4%
Hungary	13	1.3%
Slovakia	13	1.3%
Estonia	11	1.1%
Finland	11	1.1%
Slovenia	11	1.1%
Latvia	6	0.6%
Lithuania	6	0.6%
Luxembourg	5	0.5%
Malta	3	0.3%
Cyprus	2	0.2%
Total	**982**	

Figure 48 – Number of respondents per Member State, sorted by country (left) and by number of respondents (right)

3. Standards

Out of all respondents, the following answers were provided to the question "**which of the following certifications do you have?"** It needs to be noted that "certified linguist" was only provided as an option to individuals and small enterprises.

Type of certification	Number of responses
Certified Linguist	348

ISO 2001	55
EN 15038	42
Question not answered	537
Total respondents	**1103**

Figure 49 – Certifications

The following graph shows the responses per Member State.

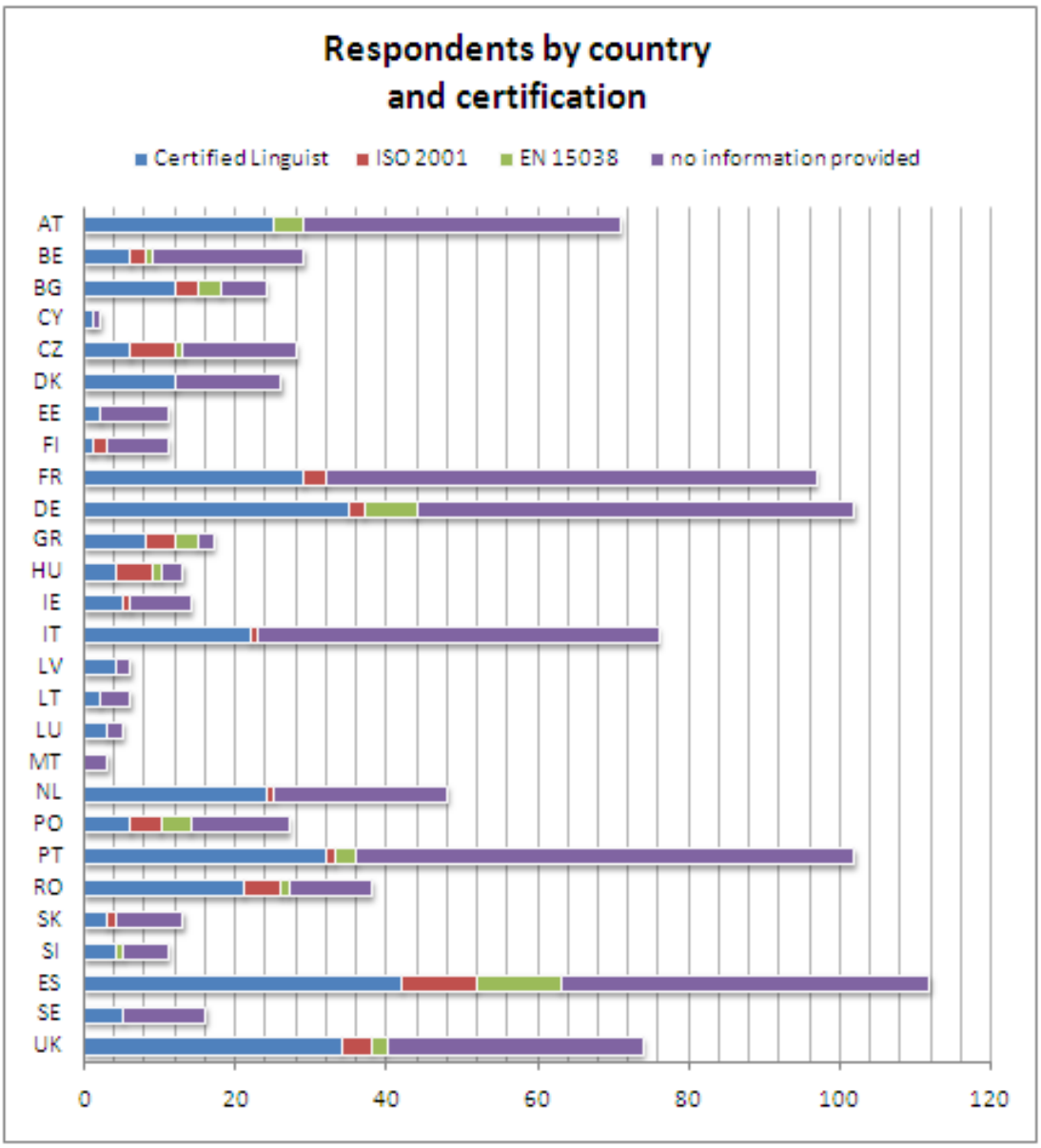


Figure 50 – Responses by country and certification

4. Turnover

As regards turnover, individuals and small enterprises were provided with a different choice of ranges compared to the larger language service providers. For the purpose of data analysis,

the two ranges were merged and the resulting categories were as follows: below 50 000 €, between 50 000 € and 100 000 €, between 100 000 € and 500 000 €, between 500 000 € and 2 million €, between 2 million € and 10 million €, between 10 million € and 50 million € and above 50 million €.

In total, 700 responses for this question were collected and the total number of respondents per category can be viewed in the following table:

Category of turnover	Number of respondents	Proportion out of total
< 50k	376	53.7%
50k – 100k	115	16.4%
100k – 500k	112	16.0%
500k – 2m	67	9.6%
2m – 10m	19	2.7%
10m – 50m	11	1.6%
50m <	0	0
Total	**700**	

Figure 51 – Total respondents per category of turnover

The interpretation of these figures by themselves does not provide much information about the sample and the market as a whole. We have therefore correlated the level of turnover with the number of employees, the number of freelancers and the number of partner companies/subcontractors. The tables with the complete numbers are presented below. For the purpose of this analysis, we have grouped the number of employees, the number of freelancers and the number of partner companies/subcontractors into subgroups: 0, 1-10, 11-49, 50-249, 250 and above for freelancers and 0, 1-3, 4-9, 10-29, 30 and above for partner companies/subcontractors. The groups were chosen in order to best represent the distribution of responses among the sample.

employees vs. turnover	0	1 – 10	11 – 49	50 – 249	250 ≤	blank	Total
< 50k	235	88	0	0	0	53	**376**
50k – 100k	41	59	5	0	0	10	**115**
100k – 500k	16	79	14	0	0	3	**112**
500k – 2m	6	29	30	2	0	0	**67**
2m – 10m	2	0	7	10	0	0	**19**
10m – 50m	3	0	1	4	3	0	**11**
50m <	0	0	0	0	0	0	**0**
blank	0	0	0	0	0	0	**0**
Total	**303**	**255**	**57**	**16**	**3**	**66**	**700**

Figure 52 – Range of turnover vs employees

freelancers vs. turnover	0	1 – 10	11 – 49	50 – 249	250 ≤	blank	Total
< 50k	116	166	33	7	1	53	**376**
50k – 100k	23	32	26	17	7	10	**115**
100k – 500k	10	15	41	36	7	3	**112**
500k – 2m	3	3	12	30	19	0	**67**
2m – 10m	2	0	3	8	6	0	**19**
10m – 50m	0	0	2	3	6	0	**11**
50m <	0	0	0	0	0	0	**0**
blank	0	0	0	0	0	0	**0**
Total	**154**	**216**	**117**	**101**	**46**	**66**	**700**

Figure 53 – Range of turnover vs freelancers

subcontractors vs. turnover	0	1 – 3	4 – 9	10 – 29	30 ≤	blank	Total
< 50k	186	48	42	40	7	53	**376**
50k – 100k	61	19	11	12	2	10	**115**
100k – 500k	38	27	18	19	7	3	**112**
500k – 2m	16	6	17	25	3	0	**67**
2m – 10m	4	3	2	7	3	0	**19**
10m – 50m	1	0	2	3	5	0	**11**
50m <	0	0	0	0	0	0	**0**
blank	0	0	0	0	0	0	**0**
Total	**306**	**103**	**92**	**106**	**27**	**66**	**700**

Figure 54 – Range of turnover vs partner companies/subcontractors

5. Languages

The question "**what language groups does your business currently offer**" was answered by 684 respondents in total. More than one option could be provided, hence the total number of respondents does not match the sum of the single responses.

Language group	Number of responses	Proportion out of total respondents
EU official languages	671	98.1%
Other European languages	237	34.6%
Russian	233	34.1%
Asian languages	166	24.3%
Arabic	152	22.2%

African languages	59	8.6%
Other	24	3.5%
Total respondents	**684**	

Figure 55 – Language groups offered

The next question "**what are the top 5 language combinations offered by your business?"** was answered in total by 683 respondents.

To draw significant conclusions from the responses provided, we weighted the language pairs with the turnover range of the respondent. Moreover, the percentage of turnover generated by each language combination[18] was taken into consideration. The order by which language pairs were mentioned is not taken into account for the analysis.

A breakdown of responses per country was performed. However, the results were not representative due to the low number of respondents per single Member States.

The following table shows the results of our analysis. The table is sorted by relevance of language pair, both horizontally and vertically

Source \ Target	English	Spanish	French	Hungarian	German	Italian	Polish	Portuguese	Finnish	Swedish
English	+	11.81%	12.17%	7.43%	6.91%	4.43%	4.34%	2.66%	1.48%	0.75%
German	4.83%	1.92%	1.23%	1.25%	+	0.70%	0.36%	0.85%	0.89%	0.10%
French	3.47%	1.63%	+	0.03%	0.24%	0.14%	0.22%	0.19%	0.00%	0.01%
Spanish	3.13%	+	0.25%	0.00%	0.09%	0.07%	0.01%	0.38%	0.00%	0.04%
Finnish	1.45%	0.00%	0.00%	0.00%	0.02%	0.00%	0.00%	0.00%	+	0.95%
Czech	1.66%	0.02%	0.20%	0.00%	0.12%	0.00%	0.00%	0.00%	0.00%	0.00%
Italian	0.51%	0.15%	0.10%	0.00%	0.18%	+	0.00%	0.05%	0.00%	0.00%
Portuguese	0.48%	0.27%	0.22%	0.00%	0.01%	0.00%	0.00%	+	0.00%	0.00%
Dutch	0.46%	0.02%	0.27%	0.00%	0.11%	0.01%	0.00%	0.00%	0.00%	0.01%
Polish	0.58%	0.00%	0.00%	0.00%	0.03%	0.00%	+	0.00%	0.00%	0.00%

Figure 56 – Top 10 language combinations

In the table above, Hungarian appears to be the 4th most important target language. This very unexpected finding is not confirmed by any other source and was therefore analysed more in-depth. The investigation led to the conclusion that one single respondent had provided a very high share of turnover generated by language combinations with Hungarian being the target language. In addition, the overall turnover generated by the LSP in question was very large,

[18] The question asked "please state the percentage of turnover generated by each language or language combination"

which led to the figures as displayed in the table above. Since all other responses provided by this participant were plausible, it was decided not to exclude him from the analysis. A detailed follow-up interview will clarify the results plotted above.

6. Fields of expertise

The question **"what are the fields of expertise most in demand among your clients"** was responded by 707 respondents.

Fields of expertise	Number of responses
Business, Finance and Marketing	522
Technical and Engineering	449
Legal and Patents	351
IT: Hardware, Software etc...	338
Health and Medical	295
Scientific	146
Education	125
Social Sciences	117
Art and Literature	88
Other (please specify)	122
Total respondents	707

Figure 57 – Fields of expertise

Other fields of expertise mentioned are listed in the table below. The table is sorted by fields most mentioned first and then alphabetically.

Tourism and travel (33)
EU, European Union, EU-related, EU affairs, EU matters, EU specific (8)
Games, gaming, videogames (8)
Automotive (5)
Agriculture (4)
Environment (4)
Journalism (4)
Literature (4)
Marketing, Marketing research & studies (4)
Architecture (3)
Certificates and Diplomas (3)
Food & beverage (3)
General, virtually everything (3)

Multimedia (3)
Music (3)
Sports (3)
Advertising (2)
Defence (2)
Government (public service) material, documents and annual reports (2)
International development issues (2)
Leisure (2)
Administration
Advertising and product descriptions for various fields
Aeronautic
Aviation
Chemistry

Commercial translations	Human rights
Contracts	Human services
Cooking	Linguistics
Corporative law	Management
Cosmetics	Manufacturing
Culture	Military
Economics	Oil industry
Editing	Organisational psychology
Energy	Politics
Entertainment	Private texts
Environment and ecology	Psychology
Environment and renewable energies	Public services
Environmental assessment	Questionnaires and surveys
Fashion	Real estates
Fisheries	Reflexology
Fundraising letters	Religion
Gastronomy	Safety
General community interpreting	Security & protection
Haute cuisine	Telecommunications
Hazardous products	Training
Health and Safety at Work	Transport
History	Waste
Horse industry	Water
Human resources	Wine

Figure 58 – Other fields of expertise

7. Language technology tools

7.1. Tools mainly used

"For the following language technology tools, please specify the name(s) of the products you mainly use". This question was answered by a total of 562 respondents. The following table shows the number of responses for each sub-question, as well as the proportion of responses out of the total number of respondents.

Language technology tools	Number of responses	Proportion out of total respondents
Translation memory tools	490	87.2%
Terminology tools	306	54.5%
Electronic dictionaries	290	51.6%
Localisation tools	149	26.5%

Translation management systems	88	15.7%
Business information systems specific to the language industry	45	8.0%
Machine translation systems	36	6.4%
Controlled language tools	18	3.2%
Conference and telephone interpreting systems	18	3.2%
Language training software (desktop and web-based)	15	2.7%
Combined systems and open systems (please specify)	7	1.3%
Total respondents	**562**	

Figure 59 – Number of responses per language technology tool used

As regards the tools mentioned, a wealth of names were provided in the open text fields. The following sections contain all responses given. In those cases where tools were addressed with different names but clearly referred to the same tool, responses were grouped together.

7.1.1. Translation memory tools

Tools mentioned	Number of times
SDL Trados, Trados, SDL Trados Pro, SDL Trados 2007, SDL Trados Studio 2009, SDL Trados Translator's Workbench, SDL	365
WordFast	82
SDLX	63
Star Transit, Transit XV, Transit Satellite PE	61
Déjà Vu, Atril's Deja Vu, Déjà Vu X, DVX	37
Across	35
Idiom, Idiom WorldServer	28
MemoQ	17
Logoport	14
Alchemy Catalyst, Catalyst	10
Passolo	8
IBM Translation Manager, IBM TM	7
SDL Freelance Suite, Trados Freelance	7
OmegaT	5
Heartsome, Heartsome Translation Suite	4
MetaTexis	4
Fortis	3
LocStudio	3
proMT	3
Similis	3
XLIFF, XLIFF Translation Editor	3
Babylon	2
HyperHub	2
LogiTerm, Logiterm & Logitrans	2
Nemo	2
Swordfish	2
Anaphraseus	1
Appletrans	1
FLIP	1
Foreign Desk	1
GlobalLink Transtudio	1
Helium	1
LanguageDirector	1
Multitrans	1
Olifant	1
OmniLingua OTIS system	1
OpenTMS	1
PlusTools	1
poEdit	1
PT2008	1

RC Wintrans	1
SDL Edit	1
SDL TM Server	1
SDL Trados Synergy Server	1
SDTOOL	1
Transibar	1
Ttw10	1

Figure 60 – Translation memory tools used

7.1.2. Terminology tools

Tools mentioned	Number of times
SDL Trados MultiTerm, SDL MultiTerm, Trados MultiTerm, MultiTerm	235
WordFast	19
SDLX	15
Across	13
Déjà Vu, Atril's DejaVu	11
Star termstar	8
IATE, IATE online database	5
MemoQ	5
Transit	5
SDL Trados 2007	4
termbase	4
multitrans	3
SDL Termbase	3
crossterm	2
Idiom, Idiom WorldServer	2
logiterm	2
MOT, MOT Gateway	2
WinAlign	2
ABBY Lingvo	1
Acolada	1
Apsic workbench	1
Apsic Xbench	1
Autoterminology (Logoport)	1
Babylon 7	1
Come2Terms	1
crosstank	1
EURLEX	1
Examine	1
Focal.ie	1
Fortis	1
GDT	1
google.com	1
Heartsome	1
Hotkey	1
HyperHub	1
ISYS	1
Langenscheidt	1
LanguageDirector Terminology	1
Lingo 4	1
Logoport	1
MetaTexis TDB	1
Multilingue Dictionary	1
multiturn	1
Olifant	1
OTISterminology	1
PlusTools	1
ProMT	1
SDLX Babylon	1
Terminology Extractor	1
WordBank	1
XBench	1
XTS	1

Figure 61 – Terminology Tools used

7.1.3. Localisation tools

Tools mentioned	Number of times
SDL Passolo, SDL Passolo 2007, Passolo, Passolo 07	57
Alchemy Catalyst, Alchemy, Catalyst	54
SDL, SDL Trados, Trados	32
Microsoft Localization Studio, Microsoft LocStudio, LocStudio	17
RC Wintrans	8
Helium	7
SDLX	7
Multilizer	6
Idiom WorldServer, Idiom WS, Idiom	5
Sisulizer	5
Across	4
WordFast	4
HyperHub	3
IBM Translation Manager, IBM TM	3
WebBudget	3
Deja Vu	2
Madcap, Madcap Flare	2
STAR Transit, Transit	2
AppleGlot	1
Avral Tramigo	1
D-Localizer	1
Heartsome	1
HTMLQA	1
LanguageDirector	1
MemoQ	1
OmegaT	1
Pebbles	1
PlusTools	1
RCLocalize	1
Robohelp	1
SAP se63	1
SIAT	1
S-Tagger	1
TranslateCAD	1
Visual Localize	1
WinTrans	1
Xbench	1

Figure 62 – Localisation tools used

7.1.4. Translation management systems

Tools mentioned	Number of times
SDL Trados, SDL Trados 2007, SDL	8
SDL Translation Management System	8
SDL Trados Synergy, Trados Synergy, Synergy, SDL Synergy	7
Across	7
Projetex	5
Translation Office 3000, TO3000	5
LTC, LTC Organiser	3
Idiom WS, Worldserver	3
Plunet Busienss Manager, Plunet	3
Project Open	3
Beetext Flow	2
WordFast	2
4D	1
Déjà Vu	1
Easy Management (order processing)	1
Espresso	1
GlobalSight (soon)	1
google.com	1
LanguageDirector	1
MemoQ	1

Merlin	1
OTIS	1
PATHPARTU NET	1
PT2008	1
SAP se63	1
Star Transit XV	1

Translator Office Manager	1
Windows Vista Business	1
Workshare Proffesional	1
XBench	1
XTRF	1

Figure 63 – Translation management systems used

7.1.5. Business information systems specific to the language industry

Tools mentioned	Number of times
TranslationOffice, TranslationOffice 3000, TO3000	9
LTC, LTC Organizer, LTC Worx, Worx	4
Plunet	4
Projetex	2
4D	1
Beetext Flow	1
Biro 2000 Online	1
CatsCradle	1
Easy Management (order processing)	1

LanguageDirector	1
Libellex	1
Lotus Notes	1
OTIS	1
Project Open	1
Proz Com; Translator's Cafe	1
RPS	1
SDL	1
TextCount	1
Trados	1
Tuition Manager	1
WebBudget	1

Figure 64 – Business information systems specific to the language industry used

7.1.6. Controlled language tools

Tools mentioned	Number of times
MS Office Proofing Tool, MS Proofing Tools	4
Antidote	2
ErrorSpy	2
Pro Lexis	2
QA distiller	2

Trados QA Checker	2
Acrocheck, acrolinx for quality control	2
i-Match	1
LanguageDirector	1
Ofro	1
Xbench	1

Figure 65 – Controlled language tools used

7.1.7. Electronic dictionaries

This list comprised 210 entries and will not be published here.

7.1.8. Machine translation systems

Tools mentioned	Number of times
Systran	9
Google, Google Translate, translate.google.com	8
Babylon, Babylon 7.0 pro	3
Language Weaver	3
Lucy, Lucy LT	2
ProMT	2
Trados	2
Babelfish	1
Kingsoft Fast AIT	1
LanguageDirector	1
Life translator	1
Lingoes	1
Moses	1
OpenLogos	1
OPTIMOT (CATALAN)	1
Power Translator	1
Pragma	1
Reverso	1
VoiceTRAN	1
Webforditas	1
Weblingo	1
webtrance30	1

Figure 66 –Machine translation systems used

7.1.9. Language training software (desktop and web-based)

Tools mentioned
ACEBO
BYKI
Digital Publicing
Dragon
Editorial Planeta (Spanish) all teachers books
Fronter
Global English
LangMaster
Longman
MacMillan Campus
McMillans
Moodle
Petrini
Rosetta
Routledge
Translito
VLS Learning Centre

Figure 67 – Language training software (desktop and web-based) used

7.1.10. Conference and telephone interpreting systems

Tools mentioned
Bahus
Beyerdynamics
Bosh
Brähler ICS
DIS
Genesys
Messenger
NetMeeting
Philips
Sennheiser
Skype
teletraductores
VoIP
WebEx

Figure 68 – Conference and telephone interpreting systems used

7.1.11. Combined offerings and open systems

Tools mentioned
Bosh, DIS
CRM: Goldmine, CMS: Schema, DMS: Docuware
Google Translate
Xbench, AntConc

Figure 69 – Combined offerings and open systems used

7.2. Products developed in-house

"Please select which tool you develop in-house": this question was answered by a total of 219 respondents. The following table shows the number of responses for each sub-question, as well as the proportion of responses out of the total number of respondents.

Language technology tools	Number of responses	Proportion out of total respondents
Translation memory tools	73	33.3%
Terminology tools	104	47.5%
Electronic dictionaries	81	37.0%
Localisation tools	29	13.2%
Translation management systems	86	39.3%
Business information systems specific to the language industry	48	21.9%
Machine translation systems	14	6.4%

Controlled language tools	13	5.9%
Conference and telephone interpreting systems	9	4.1%
Language training software (desktop and web-based)	12	5.5%
Combined offerings and open systems (please specify)	7	3.2%
Total respondents	**219**	

Figure 70 – Tools developed in-house

For those respondents who selected "combined offerings and open systems" in the question above, the following information was provided

Tools mentioned
Access Database for management and tracking
Add-ons to commercial systems
Add-ons to SAP Translation Management System
Cross-Culture information and training software
NLP analysis tools
proofing tools (spelling checkers etc)
QA tools
Translation training FOSS

Figure 71 – Combined systems and open systems developed in-house

7.3. Investment

"Please provide a rough estimate of the amount that you have invested in language technology tools to date and the likely amount you will be investing within the next 5 years".

This question was answered by 485 participants. In total, the numbers sum up to 45.8 million €, of which the proportion according to in-house and off-the-shelf, and past and future investments are shown in the table below:

	Past	Future	Total
In-house	16 732 218 €	19 857 77 €5	**36 589 993** €
Off-the-shelf	4 359 331 €	4 833 980 €	**9 193 311** €
Total	**21 091 549** €	**24 691 755** €	**45 783 304** €

Figure 72 – Future and past investment in language technology tools

The answers were then analysed by country and the cumulative results are shown in the graph below.

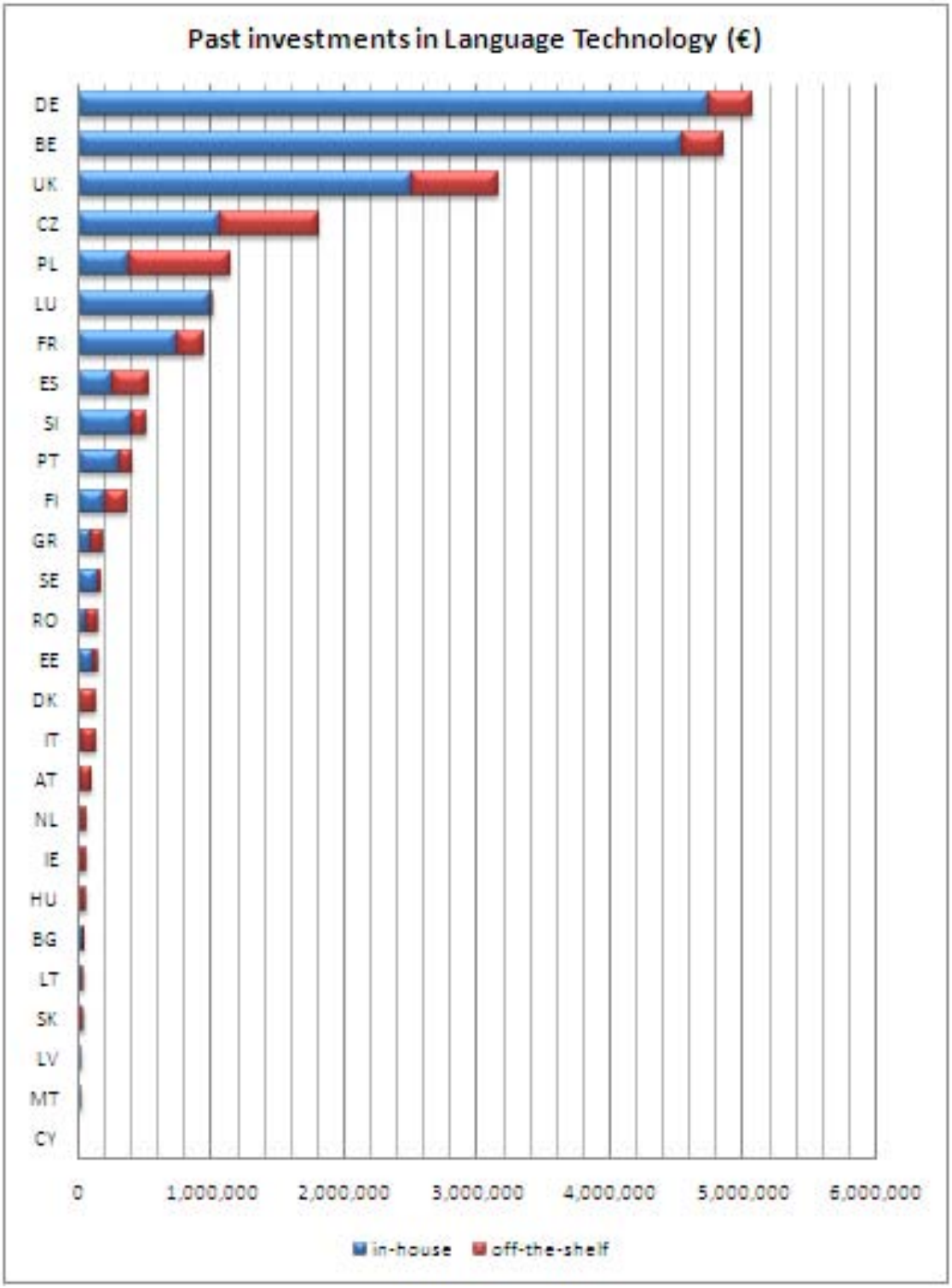


Figure 73 – Past investments in language technology tools

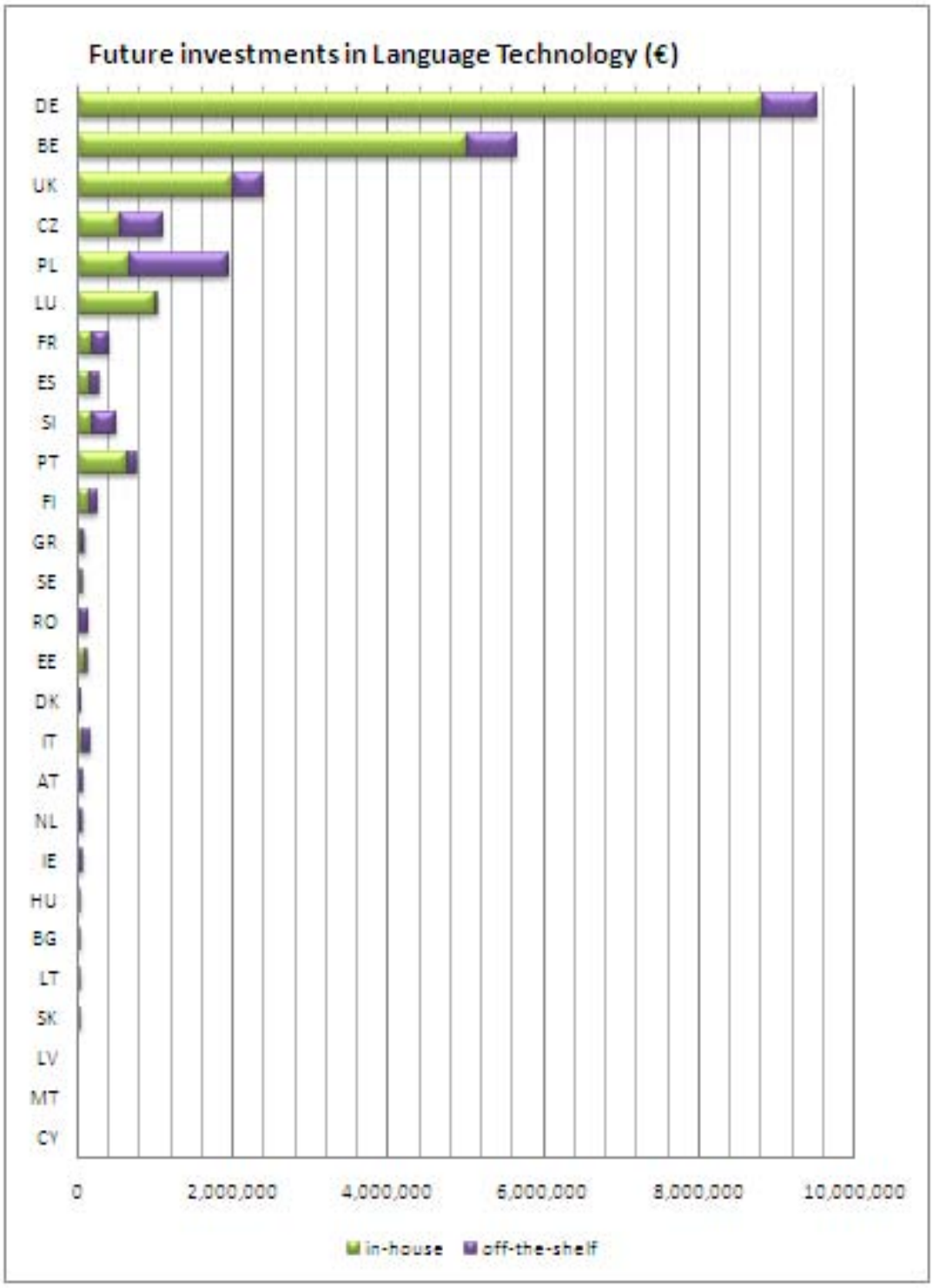


Figure 74 – Future investments in language technology tools

The question **"please state what kind of commercial language technology tool you are most likely to invest in"** was answered in the following manner:

Commercial language technology tools	priority			Total
	1st	2nd	3rd	
Translation memory tools	347	74	28	449
Terminology tools	34	135	69	238
Electronic dictionaries	61	77	85	223
Translation management systems	60	53	42	155
Localisation tools	14	67	59	140
Business information systems specific to the language industry	16	22	32	70
Machine translation systems	14	19	24	57
Conference and telephone interpreting systems	4	8	15	27
Language training software (desktop and web-based)	5	10	11	26
Controlled language tools	2	7	8	17
Total number of responses	**557**	472	373	

Figure 75 – Type of tool likely to be chosen for investment

This finding very clearly demonstrated that the industry continues to invest in linguistic technology as highest priority.

17 respondents stated that their choice was not included in the list above. The following tools were mentioned to the question **"If your choice is not included in the list, please specify"**

CMS
Computer hardware and software
Cross-culture information and training software (web-based)
Cross-platform, use of open databases, LISA compliant
Dictation software (Dragon type)
Dictionaries in printed book form
Document management software
Documentation management system
Glossaries given by the own clients
Multimedia (audio/video) localisation tools (dubbing & subtitling)
Office equipment
Specialised paper dictionaries, study books
Speech recognition systems
Subtitling and script translation tools
Subtitling software & tools
Training in language technology tools
Voice recognition software & tools

Figure 76 – Other types of tools

8. Mergers and acquisitions

"Are you aware of recent mergers and acquisitions among language service providers? If yes, what were the main reasons in your opinion?"

This question was answered by 485 respondents in total and participants were allowed to state more than one choice. The answers can be viewed in the table below

	Number of responses
To increase market share	354
To eliminate competition	265
To increase expertise	108
To be able to decrease prices	171
To increase performance	115
To diversify (enter a new industry)	97
Other reasons	23
Total respondents	**485**

Figure 77 – Mergers and acquisitions, predefined answers

The answers provided in the field "other reasons" are listed in the table below

Was not aware of any mergers or acquisitions out of the ordinary, or of the specific reasons for any that may have taken place
To use synergies
To stop themselves going bust
To reduce costs
To move (in my case).
To maintain the prices
To lower the cost of working with free-lancers
To increase prices
to forcibly lower the prices
To face front to the crisis
To be able to take on large volume urgent work
To be able to offer the client a wider range of language combinations.
The industry in general is consolidating.
Squeeze rates particularly when CAT systems are used
Satisfying the ego of CEOs, selling one's business and retirement
Profit seeking
Old companies get tired, don't see a future

Not particularly aware of such a development
Not noticed such actions
No, I'm not aware
Market & monopoly agreements
Ego
Create economies of scale

Figure 78 – Mergers and acquisitions, free answers.

9. Impact of financial crisis

"How has the recent financial crisis impacted your company in terms of estimated change of turnover"?

In total, this question was answered by 565 participants. In order to be able to contextualise responses, data was correlated with the ranges of turnover provided earlier in the questionnaire. Results are shown in the table below.

Turn Over / %	<50	50k-100k	100k-500k	500k-2m	2m-10m	10m-50m	no turnover data available	Total
decrease between 80 and 100%	5	0	1	1	1	0	0	8
decrease between 61 and 80%	9	3	3	0	0	0	2	17
decrease between 41 and 60%	31	9	4	2	0	0	6	52
decrease between 21 and 40%	67	16	21	12	1	0	17	134
decrease between 1 and 20 %	61	28	26	14	5	3	14	151
no change	30	14	17	9	3	2	5	80
incease between 1 and 20%	38	11	16	7	4	3	2	81
increase between 21 and 40%	11	5	2	5	0	1	1	25
increase between 41 and 60%	6	1	2	1	0	0	0	10
increase between 61 and 80%	0	1	1	0	1	0	1	4
increase between 81 and 100%	1	1	1	0	0	0	0	3
Total	259	89	94	51	15	9	48	565

Figure 79 – Impact of financial crisis

10. Market forecasts

"How do you see your opportunities over the next years in terms of percentage change of turnover? Please provide a rough estimate"

This question was answered by 649 respondents. The detailed number of responses per option is shown in the table below.

Please note that "no opinion" was attributed for those respondents who provided an answer to one column (e.g. 1 year) but not to the others (e.g. 2 years, 5 years, 10 years).

	1 year	2 years	5 years	10 years	Total responses
No opinion	5	59	78	105	**247**
Significant decrease by 25% and more	109	16	11	20	**156**
Slight decrease of up to 25%	162	83	21	12	**278**
Stability(no change)	237	247	140	116	**740**
Slight increase of up to 25%	110	198	285	216	**809**
Significant increase of 25% and above	26	46	114	180	**366**

Figure 80 – Future opportunities – table

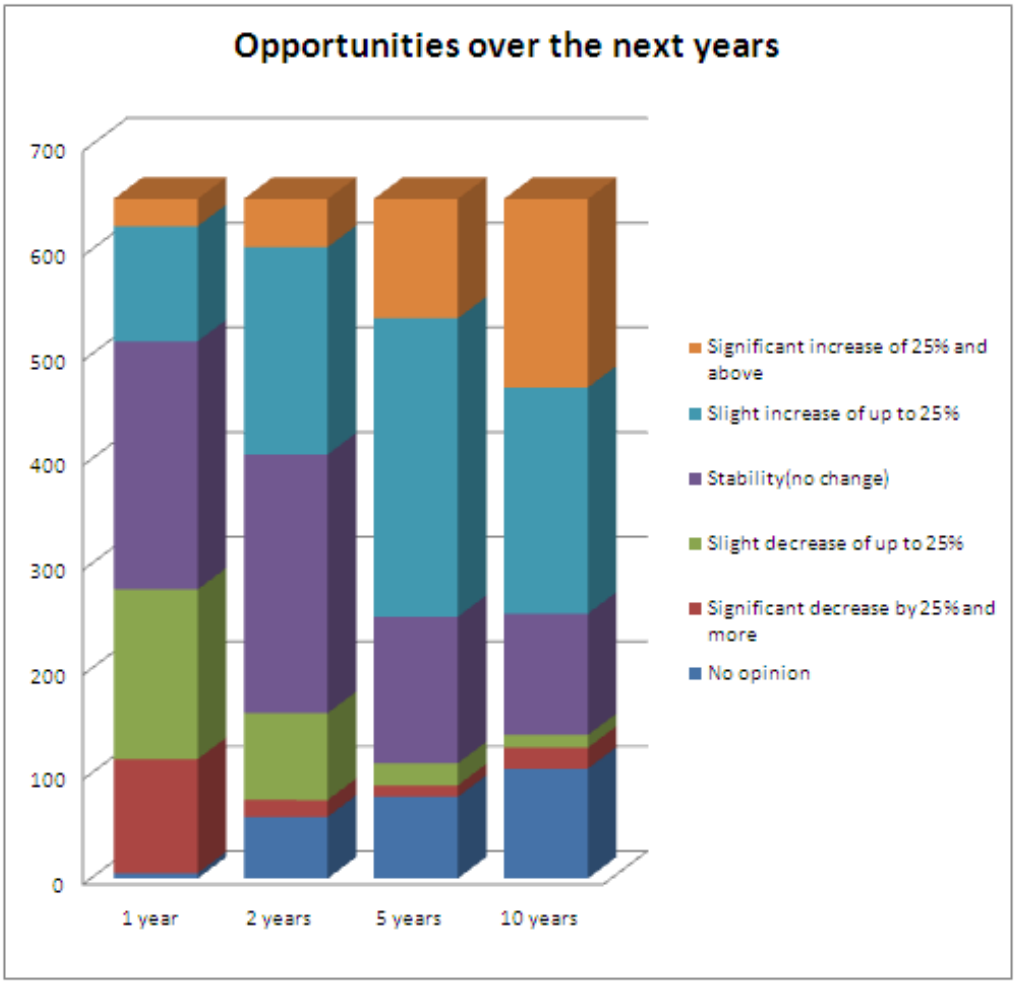


Figure 81 – Future opportunities – graph

11. Open-ended questions

11.1. Future development

"In your opinion, how will the language industry develop and why?" In total, 352 participants responded to this question. All responses were analysed and a set of keywords or "subject areas" were identified. Every response could be associated to more than one keyword. The following table summarises the number of topics mentioned by keywords:

tools/technology	123
quality/prices	110
increase	94
consolidation	46
decrease	33
globalisation	31
stability	23
geography	20
social	10

The complete set of responses can be read in the table below. Please note that responses have not been edited in any way.

Apart of the work flow will "emigrate" to the east and asiatic countries.
A lot depends on quality of MT. If gets closer to human translation then the landscape will change dramatically. If not, crucial differentiator will be ability to manage massive online collaboration without quality deterioration.
a lot of bad quality translations at very low prices
A race to the bottom. It will be very difficult to recruit new translator with sufficient skills due to impossible working conditions and low pay.
Access to translation services by Internet is leading to savings by customers, often startlingly low standard of work done and negative effects on work opportunities for competent translators
After a certain decrease, services of the language industry will develop to more qualitative services
After a period of increased computerization and standardization of procedures within the industry, it will however reach the limits of this evolution, as translation is mainly a human cognitive activity. So should "second generation TM tools" take over (corpus-based Translation-memory tools, experience/expertise sharing sites a.m.o.)
After the crisis, development will increase
An increase of quality will be requested because the globalization is forcing enhanced competition, and a bad translation can hurt expansion into a new (or existing) market, as people will associate bad quality texts with bad quality products.
As "globish" is taking over the world and clients "get used to it" (who wants to admit that he/she does NOT understand the provided "english" ???) language combinations dissapear (hardly any more work INTO French on the German speaking part of Switzerland although it is the second language of the country!) and the profession of interpretation, on private markets, will most probably dissapear, also because anyone can call himself/herself a translator and/or interpreter. Thus, the grey market is booming and.... clients don't really care mih about quality (nobody writes / speaks like YOU!!!)
As for the CAT tools, there is a trend of hegemony, since almost all companies require freelance translators to use Trados and Trados related software. I think this has a negative impact on the market, since you either buy this software or have to refuse work.

AS IN MANY OTHER MATURE INDUSTRIES, THE TREND IS LIKELY TO BE TOWARD MERGERS AND OUT-AND-OUT TAKEOVERS, WITH LARGE TRANSLATION COMPANIES TAKING THE LION'S SHARE OF THE MARKET, TO THE DETRIMENT OF SMALLER SERVICE PROVIDERS AND INDIVIDUAL FREE-LANCERS.
As long as we live and speak different languages, there always be need for translations and interpretations. With that shall improve computer and equipment technology.
As the world becomes more and more global there is an ever greater need for translators. I hope that people will become better at recognizing a good translation and realize that is it worth the cost.
badly because less and less have the conscience that translating is a real work and not only a 'google-translation'
become more bottonline and less quality
Bigger companies will continue to get bigger, and medium companies will have a harder time surviving; especially since clients start to build their own language expertise.
by streamlining process, being more flexible and develop useful machine translation tools
Collaborative cooperation
Commercial versus open formats and standards
Communication as part of globalization has an increased importance every year. Language industry is the core of this engine.
Computer aided translations will increase with prices going down
Computers will play a larger role in written translation
concentration
Concentration, elimination of small competitors
Constant increase, because of increasing population and economic growth
Continued trend towards mergers and acquisitions because larger organisations are more flexible to absorb market fluctuations and increase market share
Continuity of development, more technology, stability of prices, increase of languages needs.
Continuous quality reduction, due to lower rates, faster turnarounds, growing lack of transparency in final revision procedures and quality of translators and proof-readers. As I was told by a German customers, "final customer doesn't want quality but only cheaper prices".
Crisis will hit very hard and some translation agencies will go bankrupt, others will manage by sacking their inhouse staff severely. I myself has suffered from lack of tasks already once for 5 weeks in a row, and that is worse than usual winters! Apart from that agencies are squeezing the rate they are willing to pay for translations, which is unfair to the individual translator.
Crowdsourcing, huge databases of shared language data, Machine Translation & Post Editing will play an increasing role, especially regarding the most popular language combinations. However when it comes to less common language combinations, Human Translation will remain to play a key role.
Currently we plan to expand the operations of our Polish subsidiary, using it as our base of operations in the EU. Translation and localization are only one section of operations, but volume is likely to increase as we have plans to localize software that has been successful in Japan for use in the EU.
Customers will show greater willingness to get more expertise and the low-cost-companies won't be able to master the financial crisis
decentralization owing to too greedy language service providers, therefore the clients will increasingly rely on the not so expensive services provided by individual translators, freelancers
Decrease and then stagnation; people more skilled in European lingua franca languages (en, es, fr); maybe increase in other European (ru), lesser used languages and non-European lingua franca (zh, ar,?) languages.
Decrease in price
Demand for translation will continue to expand. Experts in specific fields will be more sought-after.
Demand will increase due to an increase in multilingual communication

Depends on the market and on the laws. More translations, more understanding, so let the market rule.
Despite the financial crisis, I expect growth will continue, althoug it may slow down. International co-operation increases continuously, which increases the demand for language services. The economic situation affects some corporate clients heavily, but language services are needed in many other areas, too, which will soften the impact to our industry.
Development of more sophisticated CAT tools, with build in intelligence modules
Development will be based on even more efficient translation tools. Awareness of customer concerning translation tools will rise as well as required quality standards. Companies have to focus on state of the art technology to be competitive. Prices will drop even more due to market pressure.
Due to globalisation language industry will grow.
Due to the global economic crisis also having its impact on Estonia (in particular, the recent increase in unemployment at the rate where more than 2000 people are losing their jobs per week), many of the freshly unemployed people have started to offer translation services and some of them might even be good at it, so the competition will increase. However, as a provider of quality services, I am hoping to keep my current customer base (some of them have commissioned translation services elsewhere at much lower rates and yet have come back to me as they are willing to pay more for quality). However, this increased competition is to be expected for the near future. Regarding the long term perspective, I'd assume that different software applications (translation memories, terminology tools etc.) will become increasingly important. Regarding Estonian the machine translation/automated translation will not have as much relevance due to the peculiar linguistic structure and grammar of that language. Same applies to Finnish. So human translation will be needed for these languages. regarding the industries, I would expect to see more language service providers merging or combing their forces.
Due to the smaller number of the business companies, the language industry will decrease
English beace common language and the necessity to translate will be limited
English will continue its ascendancy as the preferred language of the EU and in the longer term reduce demand for translation into minority languages.
Eventually translation will be automated completely, or people will speak a universal language (direct thought processing), until that time translations will be done by humans
Evolution towards integration of authoring and translation by sharing TM with authoring tools. We do not see a change in the fragmentation of the industry, although a consolidation at certain levels will continue to occur.
favorable
Favorable development because of increasing exchange between nations.
Fewer, bigger companies and more professionalised companies.
focus will have to be placed on quality rather than price. There is a current trend to drop prices, but this will backfire the industry in the long run. As more people become aware of the relation between rates per word/line/page and their hourly income, more and more people will probably start to opt for hourly rates, not text-based ones.
FREE-LANCE TRANSLATORS WILL INCREASINGLY DEPEND ON TRANSLATION COMPANIES FOR WORK, AS THE LATTER WILL TAKE A GROWING SHARE OF THE MARKET.
Further technical development, increase in working in teams on platforms with precise terminology. Still – there always will be a place "other" – the highly specialized translator who works with – a pencil and paper.
FUTURE DEVELOPMENTS OF LANGUAGE INDUSTRY TEND TO AN INCREASE IN THE PERCENTAGE OF MACHINE TRANSLATION USED, WHICH WILL PROBABLY LEAD TO A DECREASE IN PRICES, BUT MAY ALSO RESULT IN AN INCREASE IN PRODUCTIVITY. THERE IS ALSO A TENDENCY TO HAVE HOMOGENEUOUS PRICES ALL-AROUND THE WORLD.
Given the current situation of price competition, the development of purchasing behaviours tending to buy (low) prices instead of quality services, dumping practices by non professionals and/or colleagues coming from markets with significantly lower life standards, tax situations etc., misinformation of clients future is not bright. Personally, I would certainly consider changing business/job in the future.

globalisation will continue, with growing use of TM; at the same time, there will be small niche markets for quality translation in expert fields
Globalization and automatic electronical translating tools.
Greater use of central server-based outsourcing to increase flexibility in response to demand while maintaining/improving quality and consistency Increased integration of MT and CAT tools and consequent reduction in proportion of non-creative commercial texts (technical instructions, contractual texts, product specifications...) being humanly translated, to cut costs.
Greater use of translation assistance software with consequent reduction in fees for freelance translators. The agencies may do well from this, but the translators will not. The profession is getting more and more difficult as clients have more demanding on delivery times.
grow
Grow & become more automated, more controlled. Projects will be more & more diverse
growing competition and mergers will raise market share of larger providers, situation gets harder for one-person and small-sized businesses with fewer language combinations and smaller advertising budgets, smaller providers often forced into low paid subcontracts, aggressive competition from lower-income countries will increase, use of computer-assisted tools will increase
Growing specialisation at the high end, growing mediocrity at the low end.
Hard to say. The most important orders are subcontracted to others and then sub-sub-contracted. The professionals that are actually working in the language field are often hidden behind 2 or 3 ranges of persons that are sub-contracting the jobs.
Higher standards, greater competition, better quality
Hopefully the language industry will gain stability starting from this year since all companies producers and which are in service business already started to probe the world market for their products and services
Humans like to converse in their mother tongue. The demand for translated documents will therefore increase or at least remain stable. With the advent of machine translation, quality will become an issue and an USP for human translators, especially as concerns the non-measurable criteria, such as elegance of expression, appropriateness of tone, etc. Human translators that excel in these criteria will continue to find their niche, whereas the other translators will gradually be replaced by cheap offshore competition in the short run and machine translations in the long run. This transition will start quite soon for all language pairs that contain English, indeed, it may already have begun. For the other language pairs, it will take quite some time before that transition begins in earnest.
I am not well acquainted with the language industry. One thing is sure: the tools must not lay stress on schematic links between the source and target texts trying to keep them at all costs, and must not erase better (or even corrected translations) in the same way as wrong translations.
I believe that big language service providers will decrease their presence in the markets. The future si for small "virtual" companies and groups of freelancers associated.
I believe that tools will take a bigger place. We will see a new wave of mergers, but most of the industry will remain made of small companies. New language services will appear in the future.
I believe the language service providers will become more specialised and there will be more smaller LSP that are specialists in one language and one field on one hand, and large LSP that outsource to those smaller LSPs on the other.
I believe the translation industry will continue to grow as organisations decide to produce more and more content in other languages, and that this will be accompanied by an increase in the use of machine translation and post-editing by certain market segments.
I belive it will concentrate into larger units and, on the other hand, further specialise in terms of business concept and services provided.
I can't tell. As a freelancer, I only have a very limited view of the industry.
I do not have any overview of what is going on so I cannot nake any predictions.
i do not the slightly know, sorry.
I don't expect much change in future

I don't know yet
I guess there will be less freelance. It is difficult to be in competition with the language service providers, espacially in financing.
I have no idea, yet, but I know I have to think about it.
I have not worked long enough to say much ... It seems to me people/companies do not pay for translations unless they need to, which is why I do not think there is much margin for a decrease in assignments due to the recent crisis. New generations will be using more machine translation functions, though. Also, this very demanding work is not paid by far according to the education and work in-put. Even though I like my work very much, I could not recommend this career to anyone, unless they know they can get an in-house position with a monthly salary.
I hope it will grow, as that will benefit language contractors and subcontractors
I just hope there is still work enough for the translators
I see a strong tendency towards machine translations and decreasing awareness of the importance of human translations.
I see an increase in online learning in terms of education, and an increase in use of MT as it improves, and as MT marketing improves.
I suspect that partly depends on the results of this questionnaire! I could imagine that there will be even more outsourcing as companies expand into "pastures new" without wishing to employ permanent translators. We have discovered a large amount of interest in various regions in adult English teaching (mainly but not only in businesses). We could imagine that controls may become tighter on translators with reference to Quality Management.
I think a lot of Language Service Providers won't be able to provide quality translations anymore if they constantly ask freelancers for lower prices because freelancers will have to find more lucrative jobs.
I think it will be more and more field-specific and it will use more and more cat tools, although these are not able to provide a good product.
I think it will continue to be fragmented and will develop slowly.
I think machine translation will increase considerably. It will probably be used everywhere where controlled language is applied. Human or CAT-supported translation will be used for marketing and high-end translations only.
I think speech recognition is going to change the way translation agencies work, they will have to do some investment in cabins and equipment for individual in-house translators, but this is going to increase their work outpout and their turnover
I think that this crisis will demand that companies will have to broaden their market, so translation will be needed.
I think the emphasis will be even more on quality. CAT tools will be inevitable for all translators. Perhaps turnover times will shorten. Also, translators will be more of a community/network than so far. Hopefully there will be more and better (updated) web-based terminology databases for multiple languages (e.g. an improved IATE). At the moment new automated tools (like Google) are no threat to quality translators, but time will show. It's difficult to see how it works for agglutinating languages, also re. style.
I think the language industry will be limeted to 3 or 4 official languages.
I think the market is already saturated with translations into some languages, and due to lack of communication between governmental agencies information is being translated in duplicate is not in triplicate, a waste of money.
I think there is going to be a substantial growth to cover the needs of an ever growing European Union.
I think there will be a slow period for language industry now, but with the economy boosting in the next few years I would expect great development of it.
I think there will be two main directions : on one side, language service providers will continue merging, while on the other side there will be an increase in social networking of freelancers offering translation services directly to final clients

I think there will be two markets, one for manual and big texts with CAT tools, processing old memories to save money and mostly carried out in cheap countries and a market in high wage country for image sensitive translations with very demanding clients and closer cooperation between the agency and the client's own proofreaders. Agencies that can't distinguish themselves on price or quality will die.
I think this industry will boom again after the crisis. Because globalization needs language services.
I think we have to increase our professionalism to be different from those people who pretend to be LSPs.
If international trade and relations flourishe, then the language industry shall flourish too.
If prices continue to decline, bright individuals will leave for greener pastures and the industry will be dominated by the 24/7/365 ALL LANGUAGES at 0.03 EUR per word crowd.
If the crisis goes on, the companies will decrease the budget for language services because these services are not a priority for them during a crisis. The language industry will not develop as quickly as it could. However, more and more companies want to enter new markets and need for example their websites in several languages so the development of the language industry will increase (if the companies have the money to enter new markets...)
If the market does develop for other things like in the last years, I see a continuation of the positive long term development of the language industry, especially for the new EU languages.
If there is a major breakthrough in machine translation, the industry will be revolutionised. Until such time, I believe the business of translation will remain pretty much as it is now.
If we don't understimate the value of the human intervention, this industry will develop in the right direction.
I'm afraid of automatic translations, instead of human translations
I'm afraid prices are going further down to the detriment of quality and qualified translators
I'm not optimistic. Language providers are not prepared to pay a fair price for translation. Everything goes up and translators get less for their job as time goes on. I don't think mergers will help the situation.
I'm not very optimistic, because of the increasing number of new translators and translation agencies.
Implementing more technological advancements, offering more comprehensive services, hopefully developing some standards to eliminate pseudo-translators from the industry.
in an epoch of globalisation, language industry will increase more and more. The basis and the privileged element of communication is language!
in general there will be a good development, but customer requirements are constantly changing
In my opinion the industry is going to split in to part. On one hand, we have a more and more "technical" language industry working with CAT and other Computer tool, familiar with translation project management, which puts the stress on efficiency and the practical dimension of the job :"to make it understandable". On the other hand, we have a kind of "traditional" translation world, made of people working alone, who gain their efficiency being spezialised in one field they like to work on. They put the stress according me on nuances, which make a text not only understandable but also pleasant for a native speaker in the target language. We need both kind of translation, depending on the field and the purpose of the text.
In my opinion, a larger share of translation jobs will be assigned to larger translation companies for their experience and ability in applying CAT etc. tools and other kinds of applicable software. More and more efforts will be applied in compiling TM-s, data bases, in developing all kinds of IT-based texts processing techniques and programs. Language industry seems to be loosing the human participation.
In my opinion, language industry will develop more accurate language, localization etc... tools in order to increase performance and require less manpower intervention during the whole translation process.
In terms of workload, it will remain more or less stable. However, I expect an ongoing monopolization.
In the immediate future it will lessen because the credit crunch is discouraging expansion; after the next couple of years, I think it will grow again as companies start to expand anew.
in the long turn only professional LSPs offering comprehensive service range will survive

Increase of computer aided translations. More mergers
Increase use of machine translation to offset decreasing margins resulting from what will continue to be, and increasingly so, a fragmented market
Increase.
Increased attention for multilingual offerings in terms of advertising as the market globalises. More companies are becoming aware of the power of the Internet as part of their marketplace and therefore are providing web pages in a variety of languages. When this happens there is more work for translators as customers also need to be able to ask for goods in their own language.
Increased competition from automated, on-line or web-based translation services.
increasing because of the needs, especially commercial one's
Increasing demand due to global business
increasing need for language services through globalisation
Increasingly sophisticated CAT tools and electronic memories
Individual freelancers will feel more and more pressure from the large corporations to reduce their rates.
It has already split into two tiers: (a) businesses demanding quality translations and willing to pay the market price; (b) business only interested in meeting legal demands to provide localized texts and typically offering prices between 1/3 and 1/2 of the market price.
It has to develop, due to practical needs that generate demand for translations. This will be more significant for language pairs including the languages of newer EU member states and Asian languages; but the market for translations among widely used languages like English / Spanish / Russian will also grow.
It is difficult to say
it is going to be very difficult seeing that there are many providers from low-cost countries offering dumping prices and the customers already don't want to pay for translations, especially for English
It is going to be worse and worse without some regulation (rates and quality-wise)
It is likely too grow because communications are extremely vital, and globalisation is not longer an abstract concept.
It must develop through must ,ore EFFICIENT translation memory programmes (TRADOS is very complicated and brings much problems, according to mine and others experiences)
It will be lower prices, and harder to make a living. This comes from many things, among them the development of giant TMs.
It will be more and more free-lance based with companies being reduced to their PM departments only. Actually, I see even the PMs being free-lance... Maybe the translation companies of the future will just have a very good marketing and accountant department and all the actual language work (Translators and PM) will be all free-lance.
It will be more be specialised by sectors or industries as clients are starting to seek the services of language providers which are specialised in a given field. Also, localisation will continue to develop and to establish itself as a distinct service from translation alone. Clients will become more and more aware of the importance of localising – not just translating – their websites, products and services.
It will be more concentrated, the gap between big players and average company will increase
It will be more networking and more technological means will be introduced. Higher requirements to the quality of translation and other lingusitic srvices will be seen. Less possibilities for "lone wolves" – bigger share of agencies with regular translators more or less loosely attached.
It will become more and more centralized, owned by only a few big service providers with massive database of freelancers
It will become more specialised and more globalised.
it will become more technologised and even more globalised than it is now, because these means are very useful and are available wherever you are

It will become more technology based as software improves. Requirements will change too with regard to specific languages, for example, demand for French and German will decline while demand for Eastern European and Asian languages will grow.
It will consolidate at an increased pace compared to the current situation. Less developed economies (such as those in ECE, for instance) will pose increased resistance to that process for yet a few more years.
It will continue developing the same way it has been developing for the previous decade.
it will continue growing and expanding
It will continue to expand because of worldwide business and international communication
It will continue to flounder for as long as the industry depends on freelance translators and customers have little idea of the translation process and its issues.
It will continue to increase.
It will decrease since English is going to be an universal language
it will decrease until EEUU financial crise is overcomed and after it will slightly, but slowly increase
It will depend more on freelancers and less on multiple language providers as most clients (at least in Greece) are primarily concerned on low prices.
It will develop tremendously due to immigration and EU languages increase.
It will focus on the provision of highly specialized services, it will require a lot of investment in finding new business opportunities.
It will increase because of growing demand. However, rates will fall significantly.
It will increase in speed and reduction of cost by means of computerized language translation and teaching tools.
It will increase.
It will increase.
It will increasingly be done in low development countries or the new economic "good examples" (i.e. India, China, etc.)
It will persist, but with other languages in the focus and with significantly lower tariffs, joined by even poorer quality.
It will shape change but essentially will remain.
It will use more intensively TM and MT tools. The trend is these tools are becoming more and more productive, especially MT.
It's a quite insensitive market. Translations will be needed!
It's getting worse and worse, since people are worried just about the crisis (NUMBERS) and are putting away their concernings about linguistics. We don't spezk "numberist", we speak Portuguese, or English, or French, or Italian...
Language industry will become more and more dependant on IT
Language industry will become more and more important, specially due to the enlargement of EU.
Language industry will cover up after a periode of decrease; demand will increase again
Language industry will develop for those companies who will survive in this crisis, work will be more as less companies will be able to cover the needs of the clients.
Language industry will increase and grow exclusively in high-quality professional translations. Everyday translations will be increasingly dealt with by non-professionals (e.g. everybody who "speaks English")
Language Technology Tools would be more widespread, but the translating standards will not improve.
Large agencies are driving down prices, this will increasingly supply bad quality. Hopefully clients who care will not go for this opening up market space for networks of specialised translators to grow. Language agencies can then deal with the multilanguage projects and special needs management alone.

Large language service providers will likely lose market share to translators working directly with clients, causing these LSPs to lower prices and shorten deadlines. Because good translators are in extremely high demand, quality provided by large LSPs under high pressure will also drop.
Less control for translators. The big companies are investing in translation management systems and using them as leverage over translators (i.e. obligation to use Trados rather than any of the other alternatives on the market, despite the fact that some of the alternatives are far superior..)
Less interpretation, more translation. More docs will remain in English. Prices will remain stable, leading to an effective decrease in earnings for translators considering inflation.
Less quality, lowbanning, more market shares for countries with very low rates in translation
less translation services, more translation management services
lower prices = poor quality
Lower prices because of cheaper offer
Lower prices for LSP. New LSP entering the market. Global competition from low-cost countries.
LSP's will most likely diversify in their services and widen their scope to get more market share.
machine based translation or cheaply translated jobs are more and more becoming a rule. Kexy customers increasingly ask for "certified Translations" but don't want to pay certified proces. Translation sellers buy "cheap" freelancers, Expertise abd perfect performance are increasingly replaced by cheap mass production. However, chances are, that in a few years the mistakes made today will have become obvious and then – maybe – quality will take over again:-)
Machine tranlsation is likely to increase in order tu cut the cost of all market related translations
Machine translation based on corpora will have a larger role
Machine translation will become a significant factor. Translation will become more technical, more efficient and much bigger volumes will be translated. I don't expect a rise in prices though, as very few translators are catching up with technology.
Machine translation will become increasingly important, because the technology will continue to improve.
Machine translation will continue to develop and we shoud incorporate it as part of our daily work.
Machine translation will develop and take over most of translating.
Machine translation will improve. Economic downturn could lead to a decrease. More companies will standardize to Englis
Machine translation will never be as good as human translation. Solution: good language teaching.
Machine translations will increase due to improved tools
Many more loose networks of freelancers.
Many new startups, few companies with ability to offer sustained value, higher prices, focus on very large translation memories and networking
Mergers and acquisitions will continue in order to improve productivity, flexibility and lower costs
mergers will decrease, smaller companies will rise again, become bigger, start new mergers and the cycle begings again
More accords of the London agreement type are likely to consolidate/limit the requirements for translations in all sectors in the coming years. This will be made worse by the current economic climate.
More and more automation due to the improvement of translating software. However the increase in the use of automatic translation tools will be paired by the increase of demand for translations.
More and more 'giants' like Lionbridge or SDL will take over smaller companies, creating almost monopoly-like situtions and making it harder for smaller (local) translation agencies to compete, and for freelancers to have enough different clients.
More and more machine translation tools will be used
More and more mergers because of Clients' request for decreasing prices

More and more use of technologies and automation in order to face the market demands in terms of low cost, good quality and tight deadlines.
More and more use will be made of translation tools but, and that may just be expressing my hope, it will also become noticeable that tools facilitate the work but can never replace a human translator.
more automation
more automation resulting in lower prices and far higher volumes => market growth above 15% / yr
More automation, fewer more specialised staff
more automatisation in order to decrease prices
MORE AUTOMATIZED. AND MORE OUTSOURCED GLOBALLY. NOT A GOOD TREND THOUGH, BUT IT SEEMS UNAVOIDABLE.
More cheap unqualified suppliers, drop in prices
More competition and less qualifications
more computerized
More consolidation as clients will expect more professional services from the service side.
More dependence on technology, not as much outsourcing as predicted
More emphasis on Chinese owing to China's increasing importance in the global economy.
More freelancers, less in-house translators
More global players joining the English-laénguage market (Asian, East European). Further development of CAT tools.
More individual CAT tools (agency owned), aiming at quality.
More languages will be added
More Machine translation for IT manuals which will lead to lower prices for translators (and lower quality). Increase in prices for higly specialized translations (medical etc)
More machine translation, because of costs
More machine translation, with human editing, because it will be cheaper.
More machine translations
More machine translations and translations by third world countries
More machine translations will be sold and accepted, the need for quality translation will decrease, just because people tend to get more and more less quality products. Price governs.
more MandA for the above reasons
More mergers Development of Machine Translation
More mergers and acquisitions, quality might become more important for clients
More mergers to come; more translation tools will be used; machine translation will be more widely used as a sketch, and then corrected by humans to get the final version
More mergers which decrease price and quality, and on the other hand, creation of new smaller and quality-driven agencies
More online service provided
More person to person help required, language training and translation/proofreading on personal basis
More service-oriented; quality will be paramount, as will the human touch.
More use of technology for productivity reasons
More, and more Translation tool, and terminology tools will be used. I think it's also possible that companies will start using machine translation for some type of documents.
most translations will be done by Asian cheap translators
Much more competition from outside Europe. Cheap but standards variable. More machine translation forcing greater discounting but quality at present nowhere near good human translation standards.

My experience tells me that as long as one product is exported, the translation has to be made. So I believe the language industry will keep being needed and won't suffer much with the crisis.
My opinion is that good, specialised translators will get most of the work load and for a good rate. Generalists and mediocre translators (as well as occasional translators) will be replaced by machine translation systems.
Negativelly, with a gradual transformation of the language industry scenario, with more constraints and drawbacks to the LSP. More actors playing diversified, non-professional tasks, standardisation measures and quality-control, process-oriented procedures and the risk of fragmentation.
No big changes – new tools will occur and several providers of the tools will merge
No change
No significant change will happen
Not sure... I am a freelancer and my clients seem to be using the current financial crisis as an excuse to reduce the translation rates, so it is not looking very good at the moment. Translators are given the opportunity to bid for translation jobs on various forums where the clients ask for the lowest (or "best") rate resulting, I believe, in translators working for peanuts. It is very competitive and I think the future does not look very bright for translators financially although, I think, the workload will increase as the EU is becoming larger and excahnge of information worldwide increases.
offering domain specific MT+Post-editing
Only a combination of services and technology will foster the development of this industry.
only MLV will survive and those with savings
Only the future can say
Overall business will be reduced due to the crisis. Larger localization companies will try to reduce costs using freelancers instead of small agencies. Quality will go down.
People are always in search of tapping into new markets or reaching out to new audiences. Internet and other associated presentation technologies are becoming less expensive and more accessible to people all over the world. Despite the economic downturn – or possibly because of it – the above mentioned drivers combined with technology may increase demand for language services and quality of the service provided would be the differentiation point for language service providers no matter where they are located around the globe.
personal electronic translators.
Point1: As in others sectors, there are many players growing in the emerging countries. Actual players in the G20 countries are increasing the sucontracting of some activities to low cost emerging countries. However the translators themselves (in majority freelancers) remain still in the G20 countries because of specific knowledge, skills and edcuation. Point 2: There will be more consolidation of the translation agencies to reach a sufficient size to cope with corporate customer global needs and also to fill all functions: project maangement, terminology management, quality control, technology management, administrative, invoicing, sales, etc.
Price dumping may be a problem as due to the financial crisis more people will be out there willing to work for very little.
Prices and quality will decrease – more use of machine translation (= deterioration of quality)
Prices decrease. Developping of MT.
probably expansion of low-end providers because what counts is price and not quality
Quality and specialisation
QUALITY WILL MATTER MOST – ATTENTION TO PROVIDERS IN INDIA,CHINA, SOUTH AMERICA
Quality will suffer, because too many people believe in the partly outragous nonsense CAT systems produce as they have not yet realised that CAT tools are only as intelligent as the people who use them. AAT systems can be helpful and might increase turnaround times, but translators still do the translation.

Recently, I have noticed that the volume (whether a single document or several related documents) of documents requiring translation has increased, that is in my field (legal translation). It is extremely difficult to manage several large sized documents when you work alone. Therefore, it would seem to me that if this trend should be confirmed, that it is becoming more and more necessary to work as a team, either by merger or outsourcing (not my favourite)...
remain as is. MT will not be used by SMEs for another 50 years but remain a niche product for the big corporations.
shift from translation to editing texts by non-native speakers
Shorter product lifecycles and increased competition will emphasize the need for more automated processes.
Significant growth
Slow, linear fashion. Language standards dropping (e.g., electrical goods sub-standard multi-language manuals) and widely accepted. Machine translation users breaking into market and setting very low prices
Stability. Quality service languages is always on demand.
Stable
Stably grows because there will be more international transactions.
Stagnate due to crisis
Standardization, global competitors.
Standards for exchanging memories and terminology TMX, TBX), i.e. the tool used for translation is not that important anymore, translators can use their preferred tool without negative impact for the client; centralized memories/termbases; vendor independent editors (XLIFF), i.e. the translator cann use his/her favorite editor
Strong increase in Machine Translation
subcontract to those low cost workforce
Technology will drive performance.
Tendency towards more solely web-based agencies to cut down overheads
Text translation will become machine-driven with massive TMs, but multimedia translation has hardly even begun yet, and the challenges here are huge.
The big players will get bigger, eating the smaller players (who will suffer from the recession anyway). More work will go to China, India, etc. due to cheap labour costs assisted by technology.
The continued expansion of international business will propel continued growth of the language industry. The European Union will continue to contribute to this growth by maintaining and expanding its translating and interpreting activities, offering grants for literary translation projects, etc.
The current economic situation has led to a drastic decrease in prices. For that reason only companies – no matter what size – with a reasonable financial background will have a chance to survive.
The development will be significant due to EU market needs.
The English language will dominate even more and less translations are required
the focus will be more in machines & software and on an overall service incl, DTP, proof review, etc. or on very specializes fields
The gap between large service providers and freelancers or very small enterprises will increase. Translation buyers will continue to neglect quality: low prices will keep on dictating their law. Young translators will be more and more efficient due to the development of translation studies. Market segmentation will be more visible: business / international organisations / arts & culture
The industry has already become vastly more technical, a trend which is likely to continue. Globalization has intensified and certain types of projects have multiplied in size and complexity as a result. As well as creating outsourced work, I believe that this is leaving an increasing niche for for small, flexible setups that can meet less gargantuan individual, institutional or corporate needs.
The industry is too overcrowded. A full-time freelance translator starting business at this moment, has few possibilities to succeed in a short or medium term. Too much competence is not very healthy for

the industry.
The industry will decline and more and more work will be done via TM and Machinetranslation
the industry will revert to mother tongue translators paying for quality rather than cheap low quality translations being bought in today
The language industry is developing towards a single unified global provider (still wondering who? :-).
The language industry is flooded by untrained translators who offer their services at a low price and deliver sloppy work.
The language industry is, unfortunately, price-driven rather than quality-driven so the future will probably see more large-scale LSPs emerging trying to benefit from economies of scale while small to medium-sized LSP will try to serve niche markets.
The language industry will be developed in the future because every business nowadays can not work without language services... any kind of business must use translation companies to be able to gain customers worldwide.
The language industry will continue to standardize, consolidate and professionalize. Unfortunately, because the language services industry continues to ignore the fact that it has isolated itself from the rest of professional services it will remain an international cottage industry allowing self-destructive, cannibalistic customer acquisition methods and continued attempts in developing proprietary IT solutions.
The language industry will develop,because the World is becoming a common community and needs to communicate.
The language industry will not have a very good short-term development because of the crisis, in any case when we speak about development, we have to point only the long-term development, I mean in terms of 5 years periods or even more... The companies are trying to reduce the costs (and the costs for language services are not an exception).
The language industry will probably keep growing up as the communication and comprehension are fundamental for every relationship, both private or business related. The development will undoubtedly cover a wide range of more or less complex technological solutions, giving new possibilities to language service providers to simplify their workflows, to organize project management, to have more and better quality assurance systems etc. Thus, in the next future, language service providers are supposed to achieve more computer skilles, besides language related abilities and specialization, in order to stay in the market and improve the quality of the services provided.
The large providers will be proven to be less and less efficient in terms of quality. There will be a return to small providers who are the only ones who can offer the quality required.
The latest boom being largely powered by and via the Internet, there may be no more increase other than that driven by the new media.
The market may increase but rates and working conditions are falling down... Translators do need to specialize themselves if they want to survive...
The market will remain splitted: a few hudge LSP's against a lot of small agencies. In terms of CAT Tools, Open Source solutions will replace heavy-loaded expensive proprietary software.
The necessity for language in a globaliizing environment will increase and be better understood as a significant aspect of selling on worldwide markets; therefore, the amount of work will increase. Prices will initially go up due to greater demand, but this will be short term. Machine translation will not make the breakthrough it has forecast for several years as buyers cannot invest in the sophistication of the system to adapt it to their needs.
The need for translation will increase, but it will be more and more automated: when the jobs are small, the process (e.g. project management) will be automated; when the jobs are big, the translation itself will be automated and reviewed (see the new version of Systran). Translators will have to agree to work with translation engines to improve their productivity or they will see their rates lower. There is also an urgent need for the translators to get their language / translation skills certified by an independent authority.

The number of people being able to learn and speak another language should not increase, just because the world is getting smaller: you either have a talent for it or not. Therefore the language industry will continue to grow, as people will need help understanding other languages.
The quality will deteriorate as translation companies keep prices down and non-qualified people offer to do translations.
The tendency I see since a few years is that quantity is being more important than quality. The use of TAO increases the quantity of work done at a medium quality level. But there's no time any more to produce a high level work.
The top end will improve (in terms of earnings for good translators) while the lower end will get even worse (I'm talking of translators, not companies).
The use of machine translation and controlled writing will continue to rise.
There are far too many language agencies on the market today, and many of them only focus on a quick buck and not on quality. I believe some of these agencies will disappear due to the financial situation. Hopefully the remaining ones will be more solid and focused on long-term quality.
There is a clear trend to adopt Machine Translation. Statistical machine translation seems to be very accurate for highly technical translations. The translator will evolve to a reviewer role. Machine Translation will not be applicable to marketing and life sciences translations.
There is considerable pressure on prices at present, exacerbated by the recent economic situation but already existing before that. This may lead to more mergers.
there is going to be split into two sectors first IT and technical translation will use grat percantage of MT SW and the second one will use still more and more TM SW
there might be an increasing number of translators due to the current downturn, resulting thereby in affecting the language industry
There will always be a need for language services. As companies become more multi-national and the employees more culturally diverse, it could be that to many companies assign in-house employees who are not professional linguists with language tasks. This could lead to a drop in quality however, at which point serious companies will again turn to professional language service providers.
There will be a continued focus on process automation. Continued trend among large buyers to move to Single-Language Vendors.
There will be an even bigger lack of translators and teachers who can handle difficult (technical and legal) texts. They are not adequately trained at the university leve.
There will be an increasing demand for translation services, however with bigger pressure on prices, reaching a lowest-ever in probably 5 years from now. Mergers and acquisitions will save smaller size businesses from collapsing. New, smaller niche providers will emerge, managing to attract clients with very special needs and high expectations on quality.
There will be an increasing trend due to the necessity of translating all the EU documents.
There will be developed machine translation tools for the big languages. which decreases the turnover of some translation agencies with focus on these languages. Translation memory tools will be even more supporting. Because of the increasing cooperation between the European countries language industry will be utilized more than ever.
There will be little short-term changes
There will be more and more machine translation, because clients ask for lower prices
There will be more demand for minority lamguages such as Finnish
there will be more fusions/partnerships of small companies to be able to face market diversities and only those with good tools/technology will survive
There will be more interest in giving the job to a professional translator because in the long run, it´s more economical than having a bad translation redone.

There will be no room for cheap translators who produce rubbish. Translation agencies which hire less-qualified translators from China, India, and other low-wages countries will have to stop paying peanuts otherwise they will continue doing monkey business. Then, their clients will expell them from the market.
This depends to a freat deal of the structure and procedures and funding of the European Union
Thrive and flourish
To progress significantly due to widening of the EU common market and the intensifying the relations between EU and non-EU countries.
Toward MT, but fortunately MT technology is not so advanced and seems like it won't be a competitor for at least next 5 years
Towards a more web localisation market, hence less paper, more online demands,
Towards lower prices in general. Because of end-client cost-cutting pressures, automatisation of certain phases of the production process due to the widespread use of new technologies.
Trados will pravail
translation is an increasing business within the globalisation and machine translation will not be able to cope with it. The human translation is still the only valid.
Translation: Quality has been deteriorating with the arrival of less-than-competent and low-priced translators from new EU Member States and will continue to deteriorate as large language providers grow larger and more hungry for profits, and therefore will continue to look for cheap (and not so competent) translators in low-cost countries via Internet. Interpretation: Shouldn't change much for simultaneous conference interpreting – although some large agencies are already trying to cut costs by pushing conference interpreting via telephone and also hiring unqualified but inexpensive providers in low-cost countries. Unfortunately these large agencies are also pushing down the market rates for consecutive and liaison interpreting. There again, quality will deteriorate if this trend continues.
Translations into English will become more and more important
Translations will become more important as smaller countries enter international markets. Languages change constantly meaning translations have to be updated. Conglomerates will form but the translation world will always need freelancers due to the diversity in translations and translation services.
Translators will be able to share gigant memories on a server they connect to via the Internet.
Tremendously. All the human need communication
Two separate fields: price driven and specialty-driven, both for language training and translating with a substantial price differential
Unfortunately we will depend more on machines and technology for language services.
Unless people start concentrating on quality I am afraid the translation quality will deteriorate. We need qualified, trained translators to take care of the translations and interpretation work.
Very positive because business will become even more global.
We think that on the long-term there might be automated solutions offered at very competitive prices. On the short-term there will an increase of demand due to globalisation, EU expansion, etc.
We will see more mergers among LSP's and small companies as TEXTOS will have to work as a subcontractor to survive.
We work with 24 countries in language training courses. Thus, we have a lot of connections. We also have solution partners in 4 EU member countries and about to establish a translation and counseling company in Germany. We wish that our works will speedily grow up after crisis will be finished.
Will become more and more "industrial" removing a creativity component by applying more unadequate deadlines and lower rates
will develop towards bundled professional services, technology and managed solutions hosting
will not change much, unless legal situation (protection of title) of translators or interpreter changes (no sign of that in the offing) or machine translations become so reliable that translators end up as editors/correctors/proofreaders

will specialize and diversify even more as more and more specialized and detailed knowledge is required
With machine translation getting more and more accurate in terms of quality, the industry will suffer.
With rates being constantly pushed down, freelancers will probably end up reviewing machine translated texts.
WORKING OVER WORLD

Figure 82 – Future development of the language industry

11.2. Additional comments

“ Do you have any additional comments you would like us to include in the report?

Responses provided to this question are reproduced below. As for the previous question, responses were not edited or modified.

about 90% of people offering translation services on the Web do not qualify for genuinely professional translations
At the risk of putting us all out of a job, I think it would be logical to pool translation memories at the level of, say the Commission of the EU
Automatic translation tools usage increased along the last few years, leading many people to think it can do the translator's job.
Considering that today frfeelance translators are more than before offered rates by agencies which are in direct competition with the ones of their cleaning ladies, it would be a good thing if there were public funding for networks of independent translators.
Due to the importance of quality in the translation business governments and customers should direct their attention rather on qualifications than on prices.
Due to the stated in the above question, I am striving now to find direct clients and to use the TM tools for my own benefit. I think it's very wrong the way rates go down when you own one of this, since you still have to do a lot of work and revision (no matter how many matches etc). Also, my situation now is slightly better because I entered the literary translation world. Although traditionally "low pay", literary translation provides me with some stability and the rates regular agencies are prepared to pay are going down so fast that no amount of work done for them is worthwhile anymore.
EU should insist on use of English as sole European language.
Freelance translation service providers should work together more closely (networking).
Good translators have no lack of work, but may act irrationally in view of the economic climate
Governments should do more to facilitate access to information that is necessary to humankind progress and development. Partnerships and programs, if available, need to be closely monitored to ensure good results and avoid bureaucracy and corruption.
harmonizing terminology internationally
I am concerned about the later tendencies in our industry such as lower rates and lower professional standards.
I am grateful to the DGT for making Eurovoc available to the language community many years ago, and more recently IATE and the Acquis Communautaire TM.
I feel that the confidentiality issues raised by third-party on-line machine translation and data storage are not being addressed at present and that they will become more important in the market segments moving towards greater MT and post-editing.
I have used different Cat Tools in the past, but for the last years or so I have solely being dedicating my work to first quality translations, for clients who cannot rely upon cheap translations. In many parts of the world, the one cent of a dollar per word Indian translation agencies and other Cat Tools mass translation 'factories' are splitting the market in two: a) for many clients who are not concerned about quality, b) for some clients who need perfect jobs and can afford them. I work for the latter.

I hope in the next years, end clients will seak quality and not cheap translation.
I hope that freelancers will be able to open up the market and work directly with the final customers without passing through agencies and/or language service providers
I still find quite shocking the level of innacuracy and inconsistency in the translated versions of the (mainly online) texts presented by even major companies and institutions which have quite clearly commissioned a professional translation service (in-house or our-sourced), but failed throughout the workflow to apply the necessary quality and documentary control, despite having the relevant ISO certifications. Examples would include government ministries, major cultural institutions, international banks...
I think Latin is a rising asset, as Greek will be in the future, as well as a unifying factor.
I think that translators should be integrated compulsory in every companies who have business with foreign countries as well as it is necessary an accountant, the same should apply for a translator even as freelance
I would like to mention that there is still a really great difference in how translation and language services business operates in West-European (and overseas) countries on one hand, and on the other hand – in those in Central, South and East Europe. Hence, the greater difficulties, to virtual impossibility, for independent small businesses in this field in these particular countries to develop correspondingly to the efforts and funds they invest. Hence, translation rates – it is an outrageous fact that clients tend to negotiate rates on geopolitical grounds! Also, the ISO Certification procedures should be perhaps altered a bit, in favour of the applicant.
I would like to see international standardisation of terminology in specific areas, e.g. banking...
I'm against the decreasing of prices. Translators are not cheap labour.
In fact, and with whole world crisis, I am really dissapoint with get payment after 30 – 45 days. We all were living under the same crisis, you can't wait 45 days for recieve payment and then you have to run after client all over the net for catch that payment. That is SOMETHING that translators have to be together for reject. When we finish a work we have to recieve the payment, or we cash 20% before and 80% when we finish. The rules have to be for everyone fair, if an Agency or private client demand on myself: DEADLINE, CV, EXPERIENCE, REFERENCES. I have the right to claim my payment on right time.
In some countries, there are no translator's certifications available, such as in Portugal. There are a few master's degrees in translation, but mainly for literary translation. The status of the translators is not regulated and anyone can provide translation services without any kind of certification. There should exist a competent body to regulate the profession status and to provide training in technical fields.
Interpreting at court has to be improved. It is still underestimated in most EU member states.
It is difficult to give an answer as far as the influence of the crisis is concerned. It is too early in the year to give an answer now. The only thing I noticed since the beginning of year 2009 is less consistency in the workflow. Working conditions have worsened for two to three years already. Deadlines are shorter and customers less respectful.
It is time that all professionals that want to promote in other countries and consequently in other languages than their native language understand that it is more important to have good quality. It is not serious to provide cheesy translations with many mistakes and unintelligible only because it was cheaper!
It would be important to have the market (at least in the EU) regulated so that there is fairer competition regarding rates and quality. There is so much difference at the moment and no regulation at all and final clients do not have the slightest idea of the way the translation and interpreting business is organised – when it is...
Language industry associations will (have to) play a bigger role in supporting mid-sized companies in their development.
Language related tools are still too expensive.
Language training material in other languages than English should be more readily available, therefore we are trying to develop such tools online for teachers to use
Localozation and website globalization tools could be more affordable.
LSPs should be careful not to put their vendors under too much pressure regarding rates/payment terms. We should pay increased attention to quality.

Machine translations should be banned.
Make this a regular inquiry (6 months), using a fixed panel (80%) and a floating panel (20%). PUBLISH results widely.
Many customers still prefer to work with freelance translators rather than with LSPs.
More egalitarian and less sophisticated EU translation service tendering procedures needed; representative bodies in individual member countries should be provided with better information on arising job opportunities to pass on to their members;
More protocols and guidelines (at least in the EU context) about language industry and publication of information about it.
Need to assess quality and regulate fees and terms of payment
Networking among freelancers should be developped
Point1: There is a lack of visibility today on the quality of translation agencies and translators because there is a lack of standards regarding translation diplomas and certifications. Also the translation job market is not open, most of times centered on specialized network channels and spontaneous applications.
Price pressure is beyond belief and customers are sadly indifferent as to what quality they get
Reference to standards for language service providers.
Sadly experienced proof-reading of stuff translated by others whose mother tongue was not the target langage = double work (every thing had to be re-translated), less time (short deadline), and over all very bad rate pro word (0,02 euro) Now I decline such work that comes more and more as "work oppotunity" I feel that it's done that way so that the provider can reduce his costs and bill for high quality work, regardless of the way they work with confirmed translators or not. So we find more and more documents with poor target translation and this is something which harms the whole profession
Small (one-person) companies will form an important niche due to quicker, more personal and flexible service as well as better availability (round the clock...)
Something really needs to be done to make freelance assignments pay enough to make a decent living. I still use only 50 % of my effective work hours doing paid work – the rest is book-keeping, marketing, applications, research, learning new computer programs, chasing payments, customer care etc, etc ... and then I pay approx. 60 % tax. There should be a non-protectionist union to make conditions better for all: freelancers, other translators, companies, and clients.
Sometimes there are excellent translators, but they do not get an opportunity to proof there talent. Eather, they can´t find a job or they cannot finance their own business or they do not have the relation ship.
The actual pressure on rates paid to individual translators is dangerous for future of this profession. Technology does not fulfill as far its promises and reduction of translation costs is achieved mainly by commodization of the service. It has to impact qiality at the end of the day.
The bigger reliance on Language Technologoy tools will eliminate the good (mainly older) translators who do not use those tools. As the translating process will become more automatic and uniform, the errors would be emulated and well rooted, so uprooting them would become more difficult. The technologically minded young individuals would be in the driving seat, facilitating the process, but at the same time distorting a language and making it less intelligible.
The dissemination of information through African languages has to become a priority to bridge the literacy gap.
The EU Institutions are one of the major sources of translation work. Unfortunately in 2009 the work requested by EU Institutions has decreased very significantly. This will lead to the closure of several translation agencies and force freelance translators to seek alternative jobs, in such a manner that when EU institutions require work from freelancers again, they will not be around to provide it.
The EU is basically correct re the need for certification, but invoices are hardly legitimate proof of experience (to participate in EU tenders)- in fact in most peripheral economies, they can be better characterised as proof of corruption!
The EU should support European Language Technology companies by sponsoring research a lot more that it is currently the case.
The EU-languages are getting closer to each other and more simple; there are less synonymes; words,

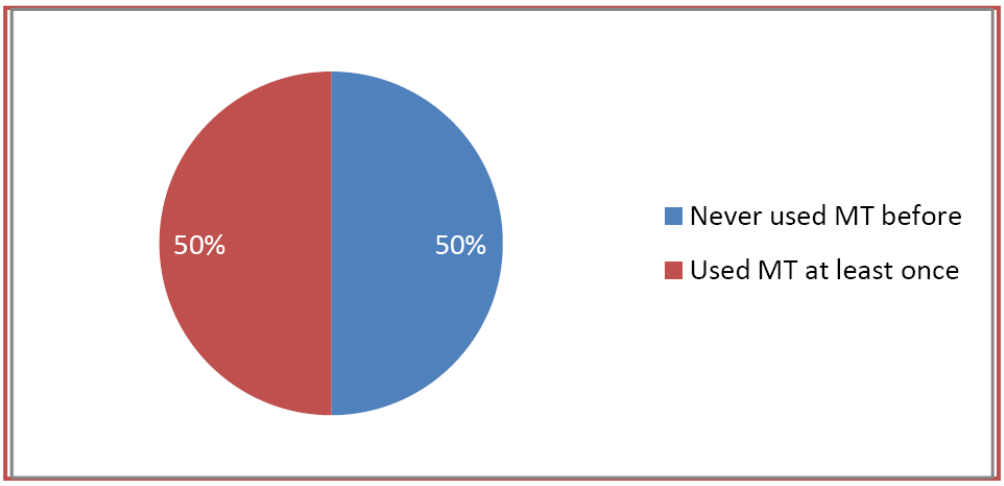
phrases and sentenses are made universal with symbols (like Chinese); EU will speak and write only Chinese in year 2200
The Euroepan Union should cooperate with all kind of language services, by granting financial support to all of them and not only to the big institutions of the country.
The existing standards for translations don't provide any strict guidance as to what quality translations should meet. This holds the door open to all kinds of potentially hazardous translations done by people unqualified for the job.
The freelancers and small companies are struggling to make ends meet. What happens now is that many companies that are awarded public procurement contracts dictate the terms of cooperation and practice "dumping" prices which negatively affect the market as a whole. There is also increasing competition from China, India, Eastern Europe. The translations provided are sometimes disatrous, which is easy to understand given the low prices they pay to their translators, but they work with high volumes. We certainly cannot work at such prices if we want to pay the freelancers an honest price and we must also keep a decent profit margin in order to finance our high corporate tax, social security system. There are also many big players on the market that get the big businesses, but seeing how SOME of them work is disturbing. Their project managers are mere administrative workers, they have no linguistic experience of background, they are just forwarding emails and provide no actual added value to the customer. There are many go-betweens in this business, sometimes 4-5 transl. agencies between final customer and translator. This means that the person doing the actual work gets a very small amount of the price paid by the customer which in turn affects sometimes quality (no direct control of quality due to outsourcing, low motivation of translator due to low prices, shorter deadlines because of the long chain of outsourcers, etc.).
The 'human' quality of translations (as opposed to artificial 'quality' measures such as EN15036) looks set to decline unless clients realize the value of using qualified linguists despite higher costs.
The industry needs more specialisation by language and field of expertise.
The insidious procedure of some agencies of paying with 60 days from the date of delivery will come to an end as more and more translators are becoming aware of their rights and market strength as to run out from such agencies.
The language industry is probably the only industry with continuosly falling prices. Together with high investments in tools this means less profit. We have to at least maintain our price level and focus on higher quality using such tools.
The overall quality of translations has become lower and continues to become more lower – the main reason, in my opinion, is an absence of adequate status and understading of this profession in the society in general and among the final clients. Thus paying less and using not qualified (I don't mean qualified formally) persons. Too often a great lack of feedback from customers that results in reproduction of low quality translations. The professional newcomers should be not only those that have acquired a degree in linguistics (with an addition of a component covering specific fields) but also those who acquired a degree in particular fields (e.g. Bachelor level) and then have been able to use an (university) option focused upon improvement of their language skills aimed to be prepared to perform translation tasks. The latter might become true if the income of translators corresponds to that of engineers, etc.
The price offered per word is dropping all the time which may make it difficult for agencies placed in high-cost countries, such as Denmark, to survive.
The translation industry needs to get rid of the self -proclaimed "translators" that mine the work of the professionals by lowering prices to a ridiculous level and by delivering poor quality jobs that only hurt the name of the real translators. Language organizations should work to educate individuals about the fact that you need more than being bilingual to be a translator.
The translation is a pretty much individual skill, it is connected with devotion and conscience of each translator.
There are some extremely bad habits in the industry – there are a lot of customers asking for a discount when CAT systems are used and unfortunately getting these discounts. CAT systems, however, do not reduce the work load very much but shift it to controlling the CAT system not to produce nonsense which they easily do.
There is a pressing need to raise our profile as a way to fight the trend towards lower prices in the language services industry. To this end, it is important that associations, institutions and users highlight

the value (quality) translations add both to businesses and the public.
There is an obsession with TM which is very misplaced. TM is useful for large bodies like the EU, for individual translators or companies that continuously need to switch from subject to subject, it is an expensive and useless adjunct that wastes translators' time and money. I have developed a system for speeding up translations and making them more accurate, using Word, that beats TM hands down, involves no expensive training and upgrades, and uses the existing tools.
There must be a way to help non-EU translators like me to be considered and used more by the EU institutions and language services. I have collected big experience in my field of expertise, but Macedonia do not use me to the full measure. Corruption is dominating on the translation scene in MK. I fight severe to survive as translator. It is a shame.
Think outside the square when looking for language expertise. Sometimes best service can be obtained not from within but from outside the country where a particular language is widely spoken.
Translation in Europe is severely menaced by offshore agencies.
Translation opportunities (particularly translations ordered and financed by EU and national government istitutions) should be more equally distributed among various providers of translation services.
Translation professions should be regulated (diplomas, membership of professional organisations submitted to quality tests and credentials) Set a minimum rate to avoid lowbanning
Translations must be given more recognition.
Translators come fom various backgrounds and acquire their skills in different ways. It would be useful to have a European Certificate for translators, obtained by passing an examination rather than taking specific courses, to guarantee a good standard of work.
We are definitely oriented towards technical, non-literary translations. EU procedures to accede to the translation jobs are way to complicated and restrictive.
We find ourselves here in Germany in an odd situation: whereas the qualifications for every other job are clearly defined and training provided accordingly, we were able as native speakers with equivalent – but not "official" translator qualifications to set up our business. This has been achieved by sheer force of personality – something which isn't usually taken into account in Germany – and the fact that we are all native speakers. This is also partly due to the fact that the "Fremdsprachenkorrespondent" qualification offered in Germany often proves insufficient for this kind of job. We also notice that our customers, often highly paid managers, take their English lessons seriously but are delighted to find something which is NOT subjected to quality management in terms of certification, tests etc. They are becoming increasingly interested not just ion the English langauge itself but also in cultural differences and characteristics: something which will help them in future to make lasting contacts and to communicate effectively.
we had to decrease our prices in order to keep clients, they are not interested in quality too much
We have quality concerns because of the great number of "non professionals" in our business; people who have no special education, but are allowed to use the titel of "interpreter" or "translator" – which should be protected.
We should significantly decrease the large price differences between translators mainly in the new EU countries toward the elder EU countries.
Whatever developments there are in machine translation the truth is that the best source of good translations will always remain human translation i.e. by a person as the human brain still exceeds the capacity to interpret words displayed by a computer.
With the arrival of countries such as India on the market, and the increased use of Internet and English as a target language, clients are inclined to use translators from third-world countries who charge far less and certainly produce work of a lower standard. Price is all-important but those of use living in high-cost countries are becoming marginalised. I would not recommend the profession to a young language graduate, other than in an international organisation.

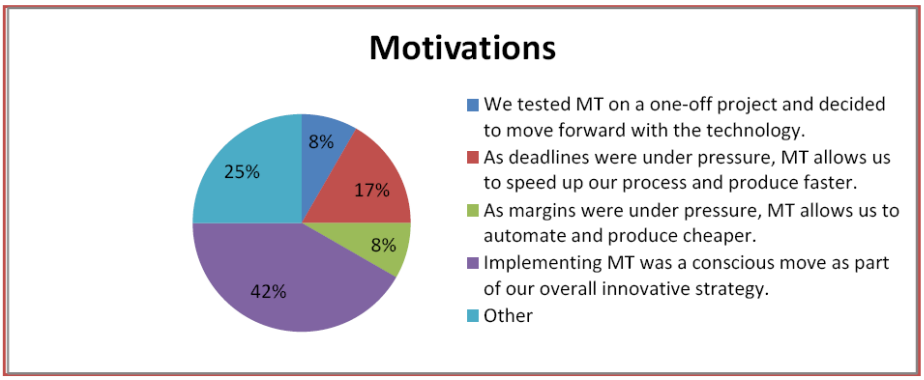
Figure 83 – Additional comments

Appendix XII – Cross language study

All figures of this appendix are taken from the 2009 study conducted by CrossLanguage (Cross Language, 2009)



What was the main reason for trying Machine Translation (MT)?



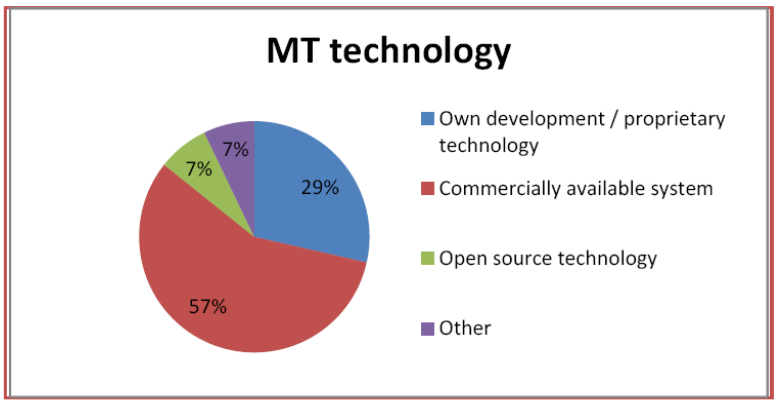
*What are the reasons for **not** implementing MT in your production process?*

Scale: 0: Not important 5: Very important

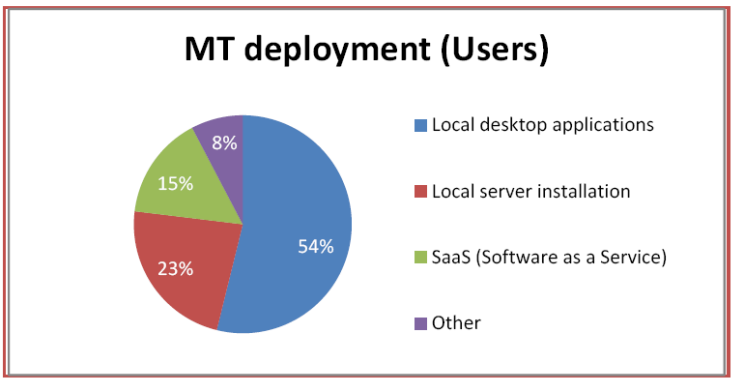
What are the main goals you would like to reach from implementing MT?

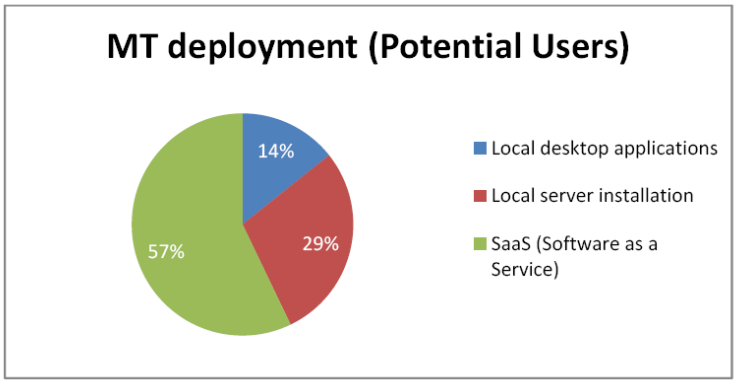
Scale: 0: Not important 5: Very important

What is the origin of the Machine Translation system(s) that you make use of?

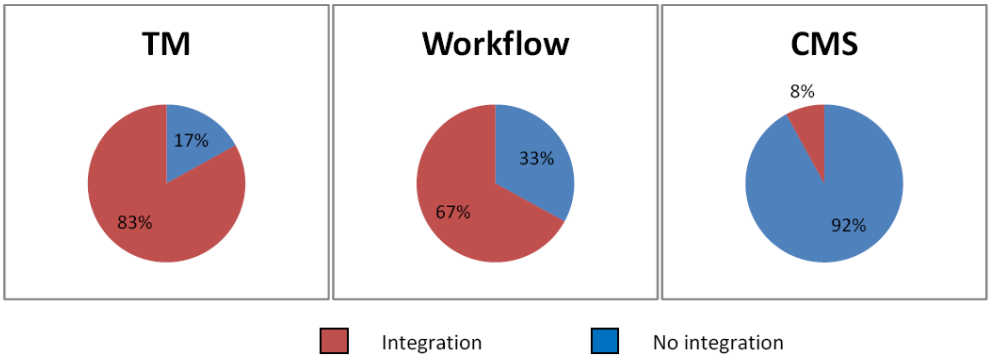


How do you deploy Machine Translation (MT)?

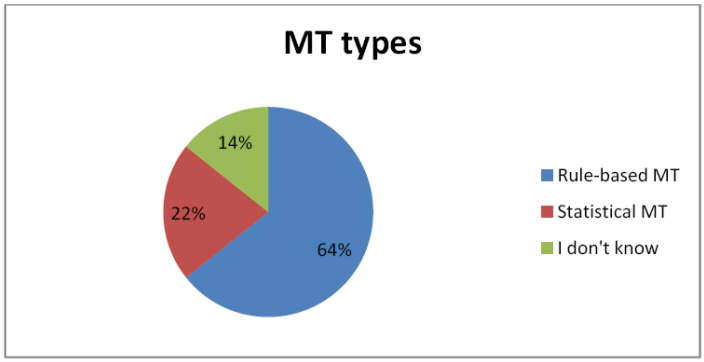




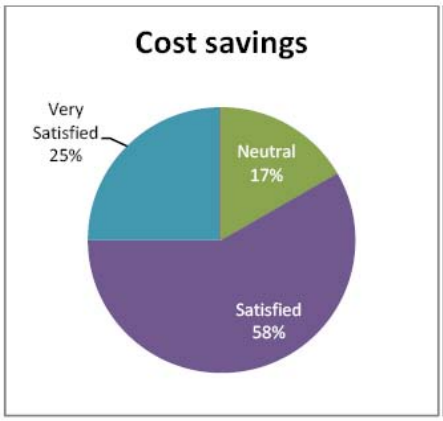
Which software applications is your MT engine integrated with?

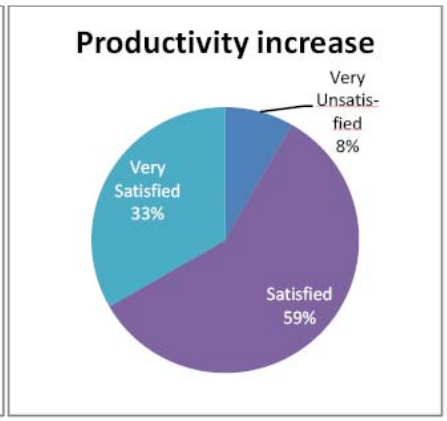


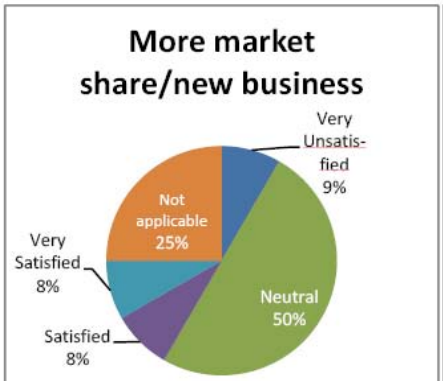
Which type of Machine Translation (MT) technology do you deploy?



How satisfied are you with the benefits obtained from implementing MT?

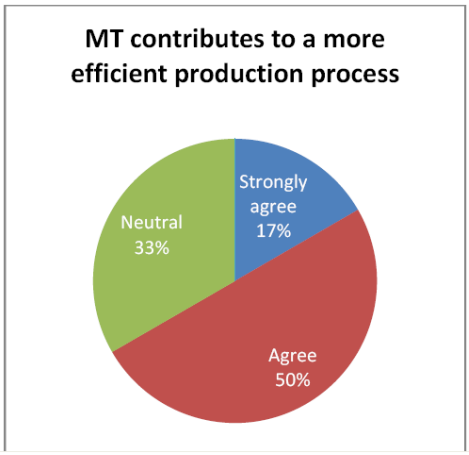


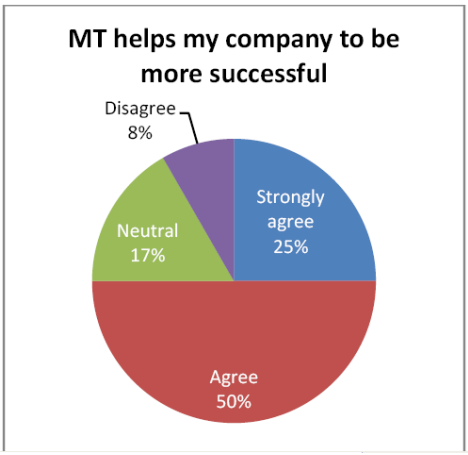


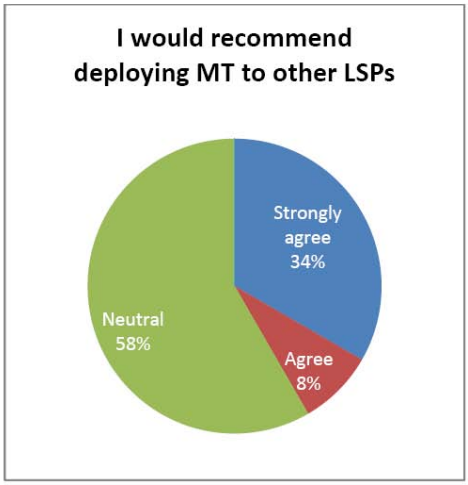


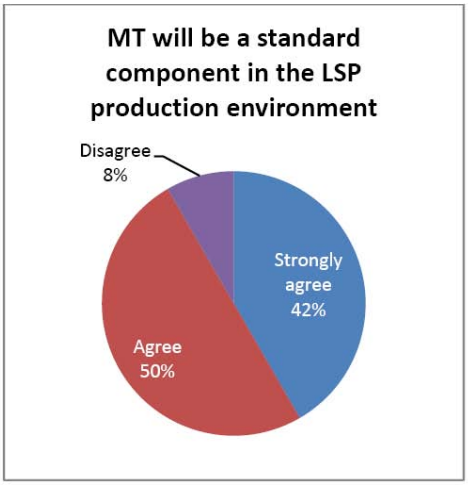
Do you agree or disagree with the following statements:

By way of conclusion, the survey respondents were asked whether they agreed or disagreed with a few statements on MT.









Appendix XIII – Country fact sheets

Explanatory country fact sheet

1. Country facts

The information in this section is retrieved from the following sources:

Year of EU entry:	(European Union, 2009)
Political system:	(European Union, 2009)
Capital:	(European Union, 2009)
Official language(s):	(European Union, 2009)
Currency:	(European Union, 2009)
Exchange rate as at 19.05.2009 (1 €=...):	(European Central Bank, 2009)
Population (million):	(European Union, 2009)
% of EU-27 total:	Manually calculated
Employment (million):	(Eurostat, 2008b)
% of EU-27 total:	Manually calculated
Average gross annual earnings (€), 2006:	(Eurostat, 2008b)
Level above/below EU-27 average:	Manually calculated

2. Main actors

2.1. List of professional organisations contacted for the study

The list of professional organisations was compiled manually, from a variety of sources (e.g. through the member lists of European and international associations)

2.2. List of universities offering studies in applied linguistics

This section contains a list of European universities offering studies in applied linguistics

3. Statistical data

3.1. National Statistics Office

This section contains the main information about the statistics offices in each country. The information was retrieved manually through the national websites of the statistics offices. The information about the national coding system and the NACE code it relied on was retrieved either through the websites, or through the data that was provided by the offices themselves.

3.2. Other authorities contacted

This section lists all other authorities that were contacted in the course of our research. The types of authorities that were contacted include the following (in order of frequency):

- Ministries of finance
- Chambers of commerce
- Companies Registers (e.g. Enterprise Register, Companies Registration Office and Institute of Registries)
- Business Registers
- Trade authorities (e.g. Ministry of Trade and Industry and Investment and Trade Development Agency)
- Ministries of Education
- Ministries of Justice
- Tax offices

The names of the authorities varied in some countries, some examples have been included in brackets.

4. Materials collected per sector

This section contains all information that was collected for every sector. In case we were not able to retrieve any report, publication or statistics which refer specifically to the country, the following will be stated in the relevant section:
No publications referring specifically to this sector could be retrieved for the country.
All statistics, reports or publications are introduced with the following heading:

Author	Year of publication	Title of publication

Any contents of the publication will be explained underneath the heading. At the bottom of every section, there will be the list of remaining publications not yet mentioned with the following note:

Additional information on this sector is available in the report(s) above.

A comprehensive list of all reports and publications mentioned in the country fact sheets will be contained in the bibliography list at the end of the report.

4.1. Translation and Interpreting

4.1.1. General translation

This section contains all reports, publications and statistics about the translation and interpreting sector, excluding the sub-sectors literary translation and sign language interpreting, which are treated separately.

Where possible, we provided estimates for the year 2008. Moreover, in those countries where data was provided from a variety of sources, comparisons were made among these publications and the data collected through authorities. However, comparisons were not always possible because of the different data collection methods.

In some cases, we used the following findings from other reports to obtain concrete figures:

- In 2006 in France, there were 13 times as many freelancers as businesses (CNET, 2006). Hence, the ratio of freelancers per business operating in the translation and interpretation market is 13/1. Although this ratio is likely to be higher in some emerging European markets, due to the fact that no other reliable sources could be identified, we used this ratio as a guide for calculations throughout these country fact sheets.
- The average yearly turnover growth rate of the language industry was estimated at 7.5% by Common Sense Advisory (Beninatto & DePalma, 2007).
- According to the business services report published by the French Institute of Statistics and Economic Studies (INSEE, 2007), the proportions of "translation and interpretation" out of the broader classification code "Secretarial and translation activities" are as follows:
    - number of businesses: 33.5%
    - number of persons employed: 24.2%
    - turnover: 26.3%

The findings above might not always be applicable to other Member States. However, since we could not identify other reliable data sources for this matter, we believe these proportions provide a valid basis for making assumptions about the European market.

4.1.2. Literary translation

Information in this section is taken from – but is not limited to – the following publications:

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

For the relevant countries, data on literary translation extracted from the CEATL report mentioned above was summarised into a table as follows:

Number of active literary translators:	
Association members (lit. trans. only):	
Number of (new) books published per year:	
Percentage of translations:	
Number of new works of literature per year:	
Percentage of translations in literature:	
Average annual income (turnover) of literary translators (€):	This figure is the sum of the following: the maximum fee per page multiplied by the average annual output, the average annual income from royalties or percentage shares and the average annual income from grants and subsidies.
Average annual gross income of literary translators (€):	The average gross income corresponds to the average annual income less a 25% general rate for allowable business expenses.
Average gross income in the manufacturing and services sectors (€):	
Per capita GDP in terms of PPS (€):	
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	
PPS = Purchasing Power Standard (OECD, 2009)	

UNESCO	2009	Index Translationum

The following information was extracted in May 2009 from Index Translationum about the single Member States:

Cumulative bibliographical information on books translated and published since 1979:	
Total EU-27:	

4.1.3. Sign language interpreting

Information in this section mostly refers to the following publications:

deWit	2008	Sign Language Interpreting in Europe

4.2. Subtitling and dubbing

We were able to retrieve very limited published data on subtitling and dubbing, especially data specifically relating to individual European countries.

4.3. Software localisation, website globalisation and language technology tool development

This section contains all reports, publication and statistics about the software localisation, website globalisation and language technology tool development sector. Since there is very limited country-specific published data on this sector, in most country fact sheets this section is empty.

4.4. Language Teaching

For almost every country, the following tables extracted from Eurostat will be included:

1. The number of students in ISCED 3, listed by modern foreign language studied (Eurostat, 2009a). Unless otherwise stated, all data refers to the year 2006 and all languages indicated in the original data source will be stated.
2. The number of students in ISCED 3, listed by number of foreign languages studied (Eurostat, 2009b). Unless otherwise stated, all data refers to the year 2006.

In addition, other publications and statistics will be explained and summarised.

4.5. Conference Organisation

In most cases, in the time available we were not able to retrieve any publications for the sector of conference organisation specifically relating to single countries.

4.6. Consultancy

In most cases, in the time available we were not able to retrieve any publications for the sector of consultancy in linguistic issues specifically relating to single countries.

5. Questionnaire

5.1. Statistics on respondents from the country for each target group

This section contains some basic information about the respondents to the questionnaire:

Total number of respondents based in the country:	
Individuals and small enterprises:	
Language service providers:	
Language service departments:	

All other findings from the questionnaire will be discussed in the main report.

6. Estimate of volume and value of language market

Where possible, an estimate of the volume and value of the language market in the specific country will be provided. Figures provided in this section of the fact sheet refer to estimates and analyses obtained from data discussed and presented in section 4 – Materials collected per sector.

In almost all cases, the volume and value was only calculated for the translation and interpreting sector because we were unable to retrieve reliable figures for any of the other sectors.

Country fact sheet – Austria

1. Country facts

Year of EU entry:	1995
Political system:	Federal republic
Capital:	Vienna
Official language(s):	German
Currency:	EUR - Euro
Population (million):	8.30
% of EU-27 total:	1.68%
Employment (million):	4.03
% of EU-27 total:	1.84%
Average gross annual earnings (€), 2006:	36 673
Level above/below EU-27 average:	17.2%

2. Main actors

2.1. List of professional organisations contacted for the study

Austrian Association of Literary and Scientific Translators (Übersetzergemeinschaft im Literaturhaus, Interessengemeinschaft von Übersetzern literarischer und wissenschaftlicher Werke)
Kultur und Sprache - Österreichzentrum (Kultur und Sprache - Österreichzentrum)
ÖGSDV - Austrian Association of Sign Language Interpreters
ÖVGD - Austrian Association of Certified Court Interpreters (Österreichischer Verband der Gerichtsdolmetscher)
Universitas - Austrian Translators' and Interpreters' Association (Universitas - Berufsverband für Dolmetschen und Übersetzen)
WKÖ - Fachverband Druck Arbeitskreis Sprachdienstleister (Fachverband Druck Arbeitskreis Sprachdienstleister)

2.2. List of universities offering studies in applied linguistics

Karl-Franzens-Universität, Graz (Institut für Theoretische und Angewandte Translationswissenschaft)
Leopold-Franzens-Universität, Innsbruck (Philologisch-Kulturwissenschaftliche Fakultät, Institut für Translationswissenschaft)
Universität Wien (Zentrum für Translationswissenschaft)

3. Statistical data

3.1 National Statistics Office

Name of office (original language):	Bundesanstalt "Statistik Österreich"
Acronym:	ÖSTAT
Name of office (English):	Statistics Austria
Website:	http://www.statistik.at/
National coding system:	ÖNACE 2003
Coding system based on:	NACE 1.1
Code for translation and interpreting:	K 74 85
Contacted?	No (data available on the website)
Responded?	N/A
Data provided?	Yes
Data exploitable?	Fully

3.2 Other authorities contacted

Name of authority in English	Responded?	Data provided?	Data exploitable?
Federal Ministry of Finance	No	-	-
Austrian federal economic chamber	Yes	Yes	No (no explanation of data provided)
Telekom Austria AG - the Austrian partner of the European Business Register	No	-	-
Ministry for Education, the Arts and Culture	Yes	Yes	-
Federal Computing Centre of Austria	No	-	-
Ministerium für Wissenschaft und Forschung	No	-	-
: not applicable			

4 Materials collected per sector

4.1 Translation and Interpreting

4.1.1 General translation

Statistik Austria	2008	Leistungs- und Strukturstatistik 2007 - Produktion und Dienstleistungen

Code: 7485 (Secretarial and translation activities and copy shops)					
Class	**Businesses**	**Number of persons employed, yearly average**		**Turnover**	**Wages**[1]
	2006	**total**	**Of which employees**	**(in 1 000 EUR)**	
7485	1 607	3 414	1 870	182 343	41 889

Figure 1 – Source: (Statistik Austria, 2008b)

The following data is available for the year 2005:

Class	**Businesses**	**Number of persons employed, yearly average**
		Total
7485	1 503	3 066

Figure 2 – Source: (Statistik Austria, 2008b)

Since the data above includes secretarial activities and copy shops, an estimate of the proportion of translation and interpreting activities was performed based on the proportions provided by the French Institute of Statistics and Economic Studies (INSEE, 2007). The following table shows the estimate of the proportion of translation and interpreting activities for 2005 and 2006 based on the data provided by the statistics office, and for the years 2007 and 2008 calculated through linear regression. Since data about turnover was available only for the year 2006, it has been assumed that the turnover grows with the same rate as the number of businesses (worst case), i.e. 6.5% yearly growth rate.

	Data		**Estimate**		**Average yearly growth (%)**
Year	**2005**	**2006**	**2007**	**2008**	
Businesses	504	539	573	608	6.5%
Persons employed	743	828	912	996	10.3%
Turnover (1 000 EUR)	-	47 885	50 993	54 302	6.5%
Turnover per business (1 000 EUR)*	-	88.92	88.93	89.28	
Turnover per person employed (1 000 EUR)*	-	57.85	55.91	54.49	
Persons employed per business*	1.5	1.5	1.6	1.6	
: not available					
* manually calculated					

Figure 3 – Data on translation and interpreting (2005-2006) and estimates for 2007 and 2008

[1] „Personalaufwand“ in original document. Information on wages is only available for sector 74.

It is unknown whether freelancers are included in the figures above. Assuming that freelancers are not included, there could be an estimated **7800** freelancers in Austria. This figure was retrieved by applying the findings of the CNET study conducted in France in 2006 (CNET, 2006), according to which there are 13 freelancers for every business within translation and interpreting.

In terms of turnover, freelancers represented 40% of the total value of the French translation and interpreting market in 2006 (CNET, 2006). Accordingly, for Austria the total turnover for freelancers only would be **36 million €** and the total turnover for the translation and interpreting market in Austria would amount to **90 million €.**

EUATC - European Union of Associations of Translation Companies	2009	Practice in parts of Europe on sworn translations, notorisation and apostille

Educational / other requirements: What it takes to be accepted as a sworn/authorised/official translator

An exam needs to be passed, regardless of the degree. The exam is divided into three parts:

- Translation of legal and contractual documents,
- court interpretation,
- a theoretical part about the legislation system.

Rights/ duties of a sworn translator

Sworn translators register and operate in the legal district of their residence, unless there is shortage in other districts. Only residents from Austria are allowed to translate documents.

Universitas	2008	Mitteilungsblatt 4/2008: Verdienstmoeglichkeiten von Uebersetzerinnen und Dolmetscherinnen: (p. 19)

In September 2008, the professional association UNIVERSITAS conducted a survey among its members about the yearly income of translators and interpreters. In total, 80 respondents participated. Responses were given by both self-employed employed translators and interpreters. Out of all respondents, 80% are self-employed as opposed to only 20% working as employees. For interpreters, this gap is even wider, with 91.3% of interpreters working self-employed.

The main findings are summarised in the table below:

Overview of total turnover for the year 2007 provided by respondents to questionnaire conducted by UNIVERSITAS.

		Translators	Interpreters
Employed **(Gross earnings)**	Above € 70 001: € 50 001 – 70 000: €30 001 – 50 000: € 20 001 – 30 000: Below € 20 000:	None 25% 33.33% 33.33% 8.33%	None None 100% None None
Statistik Austria (average gross earnings, 2003)	€ 22 833		
Self-employed **(Gross turnover)**	Above € 90 001: € 70 001 - € 90 000: € 50 001 - € 70 000: € 30 001 – 50 000: € 20 001 - €30 000: Below € 20 000:	1.96% 5.88% 13.73% 23.53% 17.73% 17.65%	None 9.52% 19.05% 28.57% 19.05% 23.81%
Statistik Austria: average earnings, 2003)	€ 24 911		

Figure 4 – Overview of total turnover for the year 2007 provided by respondents to questionnaire conducted by UNIVERSITAS (Universitas, 2008)

4.1.2 Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	approx. 280*
Association members (lit. trans. only):	250*
Number of (new) books published per year:	approx. 8 500*
Percentage of translations:	approx. 5%*
Number of new works of literature per year:	approx. 2 050*
Percentage of translations in literature:	25%*
Average annual income (turnover) of literary translators (€):	22 800
Average annual gross income of literary translators (€):	17 100
Average gross income in the manufacturing and services sectors^ (€):	36 032
Per capita GDP in terms of PPS^ (€):	28 900
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	47%
*: Figures from 2005 or earlier. ^: Source: Eurostat 2005/2006 data PPS = Purchasing Power Standard (OECD, 2009)	

Figure 5 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	7 969
Total EU-27:	1 220 037

Figure 6 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3 Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Austrian Sign Language
Sign language recognised?	Yes
Deaf sign language users:	10 000
Number of sign language interpreters currently working:	100
Hourly rate (€):	40.0
Interpreter organisation:	Österreichischer Gebärdensprach DolmetscherInnen-Verband (OEGSDV)

Figure 7 – Source: (de Wit, 2008)

4.2 Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3 Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4 Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
English:	376 703
French:	97 101
Italian:	41 551
Spanish:	15 586
Czech:	722
Slovene:	678
Hungarian:	502
Slovak:	73
Total:	**532 916**

Figure 8 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3[2] by number of modern foreign languages studied

Year:	**2006**
Zero:	14 145
One:	234 365
Two:	126 223

[2] (UNESCO, 1997)

Three:	16 287
Four or more:	188

Figure 9 – Source: (Eurostat, 2009b)

Statistik Austria	2008	Arbeitskräfteerhebung 2007 - Ergebnisse des Mikrozensus

Data for 2007:

- Population 15 years and over, economically active persons and employed persons by field of study of highest education completed:
    - Foreign languages: 23 700 out of 6 905 100 (Statistik Austria, 2008a)
- Population 15 years and over by fields of study of current formal education, yearly average.
    - Foreign languages: 16 000 out of 718 400 (Statistik Austria, 2008a, p. 105)
- Employed persons and employees in job-related non formal education or training and by age and field of study.
    - Foreign languages: 31 400 out of 541 000 (age: 15 years and more)
    - Foreign languages: 28 100 out of 470 200 (age: 25 – 64 years) (Statistik Austria, 2008a, p. 113)

AMS - Arbeitsmarktservice Österreich	2008	Berufseinstieg, Joberfahrungen und Beschäftigungschancen von UNI-AbsolventInnen
Butašová et al	2007	Conception of Teaching Foreign Languages at Primary Schools and Secondary Schools
Council of Europe	2008	Language Education Policy Profile - Austria
ÖSZ - Österreichisches Sprachen-Kompetenz-Zentrum	2007	Der Schulische Fremdsprachenunterricht in Österreich
ÖSZ - Österreichisches Sprachen-Kompetenz-Zentrum	2008	Language and language education policies in Austria

<u>Languages taught</u>

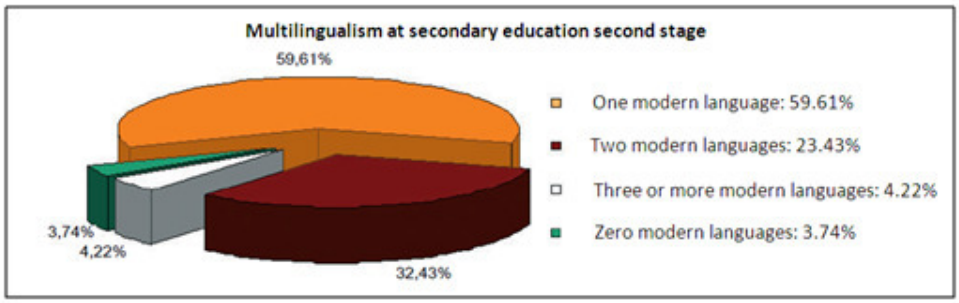
In the school year 2006/2007, approximately 430 foreign language assistants were active at Austrian schools, from English speaking countries (among other countries: USA 128, England 120, Scotland 17, Northern Ireland 2, Republic of Ireland 4) and from francophone countries

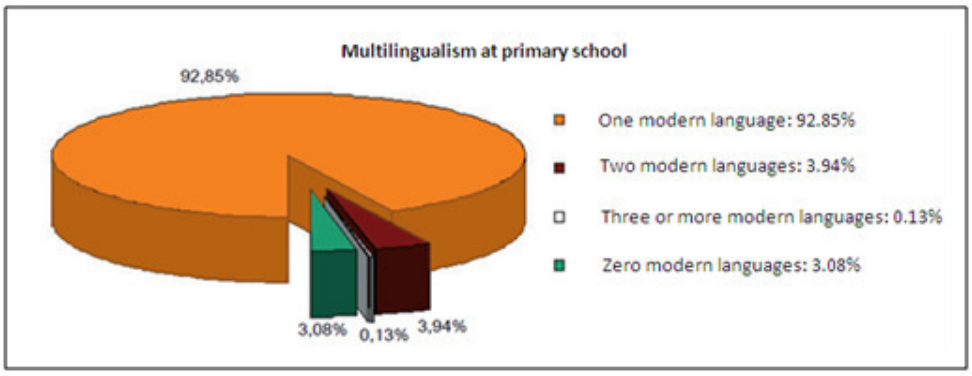
(France 125, Belgium 1, Switzerland 1); also from Italy (23), Spain (6), Croatia (2), Slovenia (2) and Russia (1) (ÖSZ, 2008, p. 57).

Delivery of classroom teaching - as well as the selection and engagement of teachers - is in the sole responsibility of the Austrian education authorities. In the school year 2005/2006, 26 019 pupils attended courses covering mother tongue teaching. Languages taught were: Albanian, Arabic, Bosnian/Croatian/Serbian (B/K/S), Bulgarian, Chechen, Chinese, Hungarian, Italian, Macedonian, Persian, Polish, Portuguese, Romani, Romanian, Russian, Slovakian, Spanish, and Turkish. (ÖSZ, 2008, p. 35).

There are university courses to prepare students to teach (*Lehramtstudium*) foreign languages, such as Bosnian/Croatian/Serbian, Czech, Hungarian and Slovene. From autumn 2008 the University of Vienna also offers courses in Polish and Slovak. For Albanian, Arabic, Turkish and other languages it is possible to obtain an MA degree (*Diplomstudium*) but not a teaching qualification. The courses in most of these languages are also offered at the four university language centres. (Council of Europe, 2008, p. 10).

The following graphs show the statistics for multilingualism at all three school levels (ISCED 1-3).





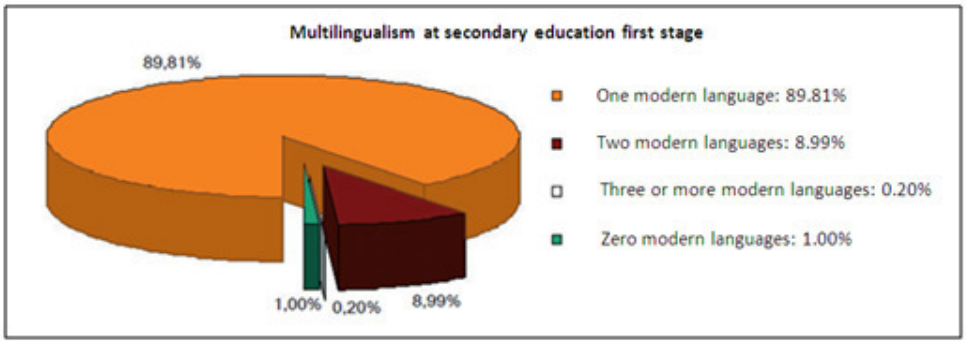


Figure 10 – Source: (ÖSZ - Österreichisches Sprachen-Kompetenz-Zentrum, 2007, p. 3)

During the school year of 2004/2005, English was the most commonly learnt language in Austria's schools. 97% of primary school pupils, 99% of students attending the secondary education first stage and 96% of those attending the secondary education second stage chose English as a modern foreign language (ÖSZ - Österreichisches Sprachen-Kompetenz-Zentrum, 2007, p. 4). The most frequent languages after English are French and Italian, which can be viewed in the following graphs.

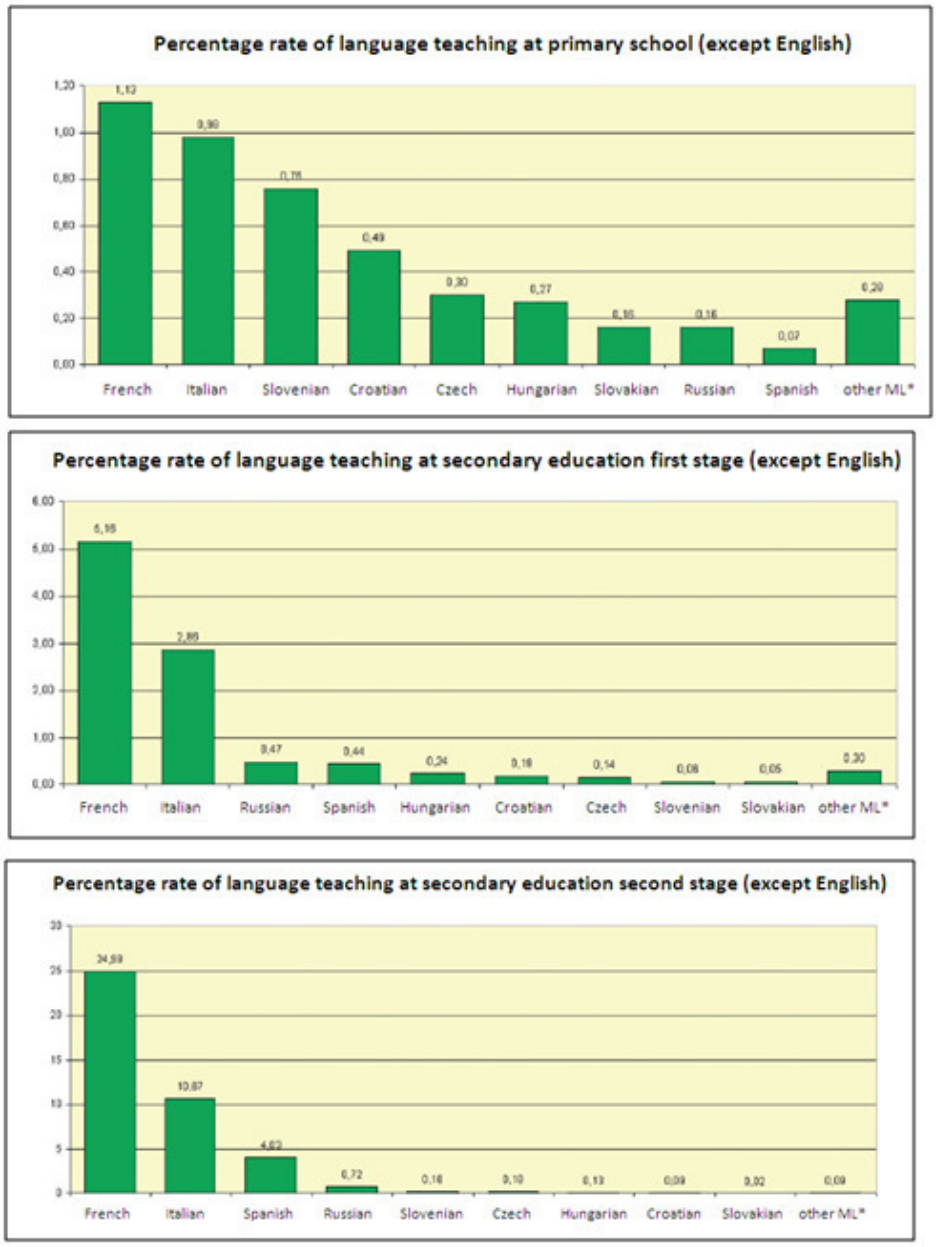


Figure 11 – (*ML = modern language). Source: (ÖSZ, 2007, p. 5)

The figures of the graphs above confirm the findings from the school year 2004/2005. The table below shows the total number of pupils receiving modern foreign language teaching at school in Austria in years 4, 8, 10 and 12 (numbers and percentages) during the school year 2004/2005.

Languages	Year 4	Year 8	Year 10	Year 12
Another MFL	231 0,25%	324 0,33%	122 0,11%	51 0,06%
English	91.718 98,61%	97.906 98,82%	104.305 94,16%	83.915 96,13%
French	1.639 1,76%	8.809 8,89%	25.710 23,21%	23.481 26,90%
Italian	1.338 1,44%	3.727 3,76%	10.638 9,60%	10.287 11,78%
Croatian	488 0,52%	199 0,20%	71 0,06%	64 0,07%
Russian	176 0,19%	462 0,47%	735 0,66%	661 0,76%
Slovak	140 0,15%	47 0,05%	22 0,02%	20 0,02%
Slovene	716 0,77%	56 0,06%	201 0,18%	143 0,16%
Spanish	97 0,10%	1.041 1,05%	4.525 4,09%	4.142 4,74%
Czech	278 0,30%	144 0,15%	195 0,18%	162 0,19%
Hungarian	195 0,21%	222 0,22%	133 0,12%	103 0,12%

Figure 12 – Source: (ÖSZ, 2008, p. 45)

Languages used informally by Austria's resident population

The Census 2001 included a question about what language or languages were usually spoken in personal situations. The following were stated as possible options: German, Burgenland Croatian, Romani, Czech, Slovak, Hungarian, Slovene, Croatian, Serbian, Turkish, and other languages used informally. The Austrian Sign Language (*Österreichische Gebärdensprache, ÖGS*) was not included in the Census: its users were classed as speakers of German. (ÖSZ, 2008, p. 15)

4.5 Conference Organisation

No publications referring specifically to this sector could be retrieved for Austria.

4.6 Consultancy

No publications referring specifically to this sector could be retrieved for Austria.

5 Questionnaire

5.1 Statistics on respondents from Austria for each target group

Total number of respondents based in Austria:	77/1152
Individuals and small enterprises:	71/77
Language service providers:	0/77
Language service departments:	6/77

6 Estimate of volume and value of language market

Estimated volume (total number of persons active in translation and interpreting activities, 2008): **1000 persons employed in companies and 7800 freelancers.**

Estimated value (total turnover of translation and interpreting activities, 2006): **90 million €, of which 36 million €** are likely to be attributed to freelancers.

Country fact sheet – Belgium

1. Country facts

Year of EU entry:	Founding member
Political system:	Constitutional monarchy
Capital:	Brussels
Official language(s):	German, French, Dutch
Currency:	EUR - Euro
Population (million):	10.70
% of EU-27 total:	2.17%
Employment (million):	4.38
% of EU-27 total:	2.01%
Average gross annual earnings (€), 2006:	37 674
Level above/below EU-27 average:	20.4%

2. Main actors

2.1 List of professional organisations contacted for the study

BAPCO - Belgian Association of Professional Conference Organisers
BQTA - Belgian Quality Translation Association
CBTIP-BKVTF - Belgian Chamber of Translators, Interpreters and Philologists

2.2. List of universities offering studies in applied linguistics

École d'interprètes internationaux (EII) - Mons (École d'interprètes internationaux (EII) - Mons)
Erasmus Hogeschool (Erasmus Hogeschool)
Haute Ecole de Bruxelles (Institut supérieur de traducteurs et d'interprètes – ISTI)
Haute Ecole Francisco Ferrer (Institut Cooremans)
Hogeschool Antwerpen (Hoger Instituut voor Vertalers en Tolken)
Institut Libre Marie Haps - BRUXELLES (Études supérieures en traduction)
Lessius University College - ANVERS (Department of applied language studies)
Université de Liège (Master de langue et littérature moderne avec module traduction)
Université de Mons-Hainaut (Institut de linguistique)
University College Ghent (Faculty of Translation Studies)

3. Statistical data

3.1 National Statistics Office

Name of office:	Statistics Belgium
Website:	http://statbel.fgov.be/home_en.asp
National coding system:	NACE-BEL
Coding system based on:	NACE 1.1
Code for translation and interpreting:	K 74 85
Contacted?	Yes
Responded?	Yes
Data provided?	Yes
Data exploitable?	Fully

3.2. Other authorities contacted

Name of authority in English	**Responded ?**	**Data provided?**	**Data exploitable?**
National Bank of Belgium	No	:	:
COFACE Belgium (the Belgian partner of the European Business Register)	Yes	Yes	Yes
Social Security Service – Statistics Division	Yes	Yes	
Tax office	No	:	:
: not applicable			

4. Materials collected per sector

4.1 Translation and Interpreting

4.1.1 General translation

National Statistics Office Belgium	2006	Statistics on average gross annual earnings

The following data were provided by the national statistics office at first contact:

Average gross annual earnings3					
Code: 7430 (Translation and interpretation activities)					
	data provided			**estimate**	
	2004	**2005**	**2006**	**2007**	**2008**
All wage earners	36 526	36 944	37 779	38 336	38 962

Figure 13 – Source: (National Statistics Office Belgium, 2006)

National Statistics Office Belgium	2009	Statistics on number of employees and turnover

The following data were provided by the national statistics office at second contact:

Statistics on number of employees and turnover					
Code: NACEBEL 74832 – Translation and interpreting services					
	data provided			**estimate**	
	2004	2005	2006	2007	2008
Number of businesses	2 562	2 629	2 692	2 729	2 770
Turnover (€)	169 568 730	187 907 354	211 647 438	234 878 827	235 563 484
Turnover per business*	66 186	71 475	78 621	86 068	85 049
*** manually calculated**					

Figure 14 – Source:(National Statistics Office Belgium, 2009)

COFACE Belgium	2009	Statistics on number of businesses

The following data were provided by COFACE Belgium:

Statistics on number of businesses	
Code: NACEBEL 74300 – Translation and interpreting	
Year: unknown	
Employees	**Number of businesses**
Total	3982
0 or unknown	3841
1 – 4	110
5 - 9	16
10 – 19	9

[3] The number of hours worked were not taken into consideration for this statistic.

20 – 49	6
Total	**3982**
Note: Data is based on VAT returns, which are completed by company and not by institution. Firms are classified into classes according to NACE for all their activities according to their main activity only.	

Figure 15 – Source:(COFACE, 2009)

The table above shows that the vast majority of businesses operating in the sector of translation and interpreting in Belgium have zero or an unknown number of employees, which could be explained with a high number of freelance translators and interpreters.

Social Security Service Belgium	2009	Data provided (2004-2007)

The following table contains the data provided by the social security service of Belgium

Statistics on number of employees and turnover					
Code: 74.852 Translation and interpretation activities					
	Data provided				**estimate**
	2004	**2005**	**2006**	**2007**	**2008**
Number of registered businesses	56	61	62	53	56
Numbers of employees	423	458	502	567	606
Employees per business*	7.6	7.6	8.1	10.6	10.8
Total wages	2 963 233	3 224 306	3 724 048	4 209 232	4 589 640
* manually calculated					

Figure 16 – Source: (Social Security Service Belgium, 2009)

We performed a range of calculations based on the data provided by the three institutions listed above (Statistics Office, COFACE and Social Security Service). All calculations led to highly discordant and even contradicting results. We were therefore not able to retrieve satisfying figures. Assuming that the data provided by the National Statistics Office at second contact is reliable, the turnover figures for 2008 can be estimated (through linear regression) at **236 million €**.

If freelancers were not included in this figure, and if the figures obtained by the CNET study for France for the year 2006 (CNET, 2007) are applicable to other European countries, the total turnover would increase to **393 million €** (of which **236 million €** would be earned by companies and the remaining **157 million €** would be attributed to freelancers).

Our estimated turnover generated by translation and interpreting activities in 2008 ranges therefore between 236 million € and 393 million €.

This range is in line with the estimate of the EUATC report (EUATC, 2005), according to which the turnover of the translation market in Belgium and Luxembourg in 2004 is 170 million €. Assuming a yearly growth of 7.5%, and adding interpreters to the statistic (representing 15% of the market), in 2008 this figure would reach 267 million € - which is at the lower end of our estimated range.

Based on the data provided by the Belgian authorities, no estimates can be made about the total number of persons active in the translation and interpretation sector.

4.1.2 Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	~~
Association members (lit. trans. only):	~~
Number of (new) books published per year:	~~
Percentage of translations:	~~
Number of new works of literature per year:	~~
Percentage of translations in literature:	~~
Average annual income (turnover) of literary translators (€):	33 950
Average annual gross income of literary translators (€):	24 465
Average gross income in the manufacturing and services sectors^ (€):	36 672
Per capita GDP in terms of PPS^ (€):	27 600
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	69%
*: Figures from 2005 or earlier ^: Source: Eurostat 2005/2006 data ~~ : No data available	

Figure 17 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	30 666
Total EU-27:	1 220 037

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3 Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Flemish Sign Language, French Sign Language
Sign language recognised?	:
Deaf sign language users:	4 500 (Flanders) & 300 - Survey 2004, response from ABILS (Wallonia)
Number of sign language interpreters currently working:	150 (Flanders) & 25- Survey 2004 response from ABILS (Wallonia)
Hourly rate (€):	27.5
Interpreter organisation:	Flanders: Vlaamse Vereniging Tolken Gebarentaal (VVTG) Walloia: Association Belge Francophone des Interpretes en Langue des Signes (ABILS)
: No data available	

Figure 18 – Source: (de Wit, 2008)

4.2 Subtitling and dubbing

No publications referring specifically to this sector could be retrieved for Belgium.

4.3 Software localisation, website globalisation and language technology tool development

No publications referring specifically to this sector could be retrieved for Belgium.

4.4 Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
English:	376 645
French:	248 435
Dutch:	139 813
German:	89 923
Spanish:	12 633
Italian:	576
Total:	**868 025**

Figure 19 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	2006
Zero:	64 172
One:	92 777
Two:	250 980
Three:	88 592
Four or more:	1 878

Figure 20 – Source: (Eurostat, 2009b)

Butašová et al	2007	Conception of Teaching Foreign Languages at Primary Schools and Secondary Schools
Eurydice P9 EACEA	2008	Key data on teaching languages at school in Europe

In Belgium, the total minimum amount of the recommended time for foreign language teaching as a compulsory subject in primary education is 485 hours and 364 hours in compulsory secondary education (Eurydice P9 EACEA, 2008, p. 96).

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe – Belgium (Flemish community)
Eurydice	2005	Content and language integrates learning (CLIL) at school in Europe – Belgium (French Community)
Eurydice	2005	Content and language integrates learning (CLIL) at school in Europe – Belgium (Germany Community)

Additional information about language teaching in Belgium can be found in the reports above.

4.5 Conference Organisation

No publications referring specifically to this sector could be retrieved for Belgium.

4.6 Consultancy

No publications referring specifically to this sector could be retrieved for Belgium.

5. Questionnaire

5.1 Statistics on respondents from Belgium for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Belgium:	**30/1152**
Individuals and small enterprises:	19/30
Language service providers:	10/30
Language service departments:	1/30

6. Estimate of volume and value of language market

Estimated value (total turnover of translation and interpreting activities): between **236 million €** and **393 million €** (of which **236 million €** could be earned by companies and the remaining **157 million €** could be attributed to freelancers)**.**

Country fact sheet – Bulgaria

1. Country facts

Year of EU entry:	2007
Political system:	Republic
Capital:	Sofia
Official language(s):	Bulgarian
Currency:	BGN - Lev
Exchange rate as at 19.05.2009 (1 €=...):	1.96
Population (million):	7.60
% of EU-27 total:	1.54%
Employment (million):	3.25
% of EU-27 total:	1.49%
Average gross annual earnings (€), 2006:	2,195
Level above/below EU-27 average:	-93.0%

2. Main actors

2.1 List of professional organisations contacted for the study

AIT - Association of Interpreters and Translators in Bulgaria
ASEC - Association for communication in specialised languages (Association pour Communication en Langue Spécialisée)
BAPITA - Bulgarian Association of Professional Interpreting and Translation Agencies
BTU - Union of Bulgarian Translators
OPTIMA - Bulgarian Association of Quality Language Services

2.2. List of universities offering studies in applied linguistics

New Bulgarian University - SOFIA (Foreign languages and cultures (philologies))
Saint Kliment Ohridski University - SOFIA (Faculty of Classic and modern languages)
South-West University “Neofit Rilski” (Faculty of Philology)
St. Cyril and St. Methodius University of Veliko Tarnovo (St. Cyril and St. Methodius University of Veliko Tarnovo)
The Paissii Hilendarski University of Plovdiv (Faculty of Philology)
University of SHUMEN (Faculty of Philology)

3. Statistical data

3.1 National Statistics Office

Name of office:	National Statistical Institute Bulgaria
Acronym:	NSI
Website:	http://www.nsi.bg/
National coding system:	NACE.BG 2008
Coding system based on:	NACE 2
Code for translation and interpreting:	unknown
Contacted?	Yes
Responded?	Yes
Data provided?	No (no data available)
Data exploitable?	N/A

3.2 Other authorities contacted

Name of authority in English	Responded?	Data provided?	Data exploitable?
Ministry of Finance	Yes	No (referred to NSI)	:
Bulgarian Chamber of Commerce & Industry	No	:	:
: not applicable			

4. Materials collected per sector

4.1 Translation and Interpreting

4.1.1 General translation

EUATC - European Union of Associations of Translation Companies	2009	Practice in parts of Europe on sworn translations, notorisation and apostille

Educational / other requirements: What it takes to be accepted as a sworn/authorised/official translator

Everybody can act as a sworn translator in Bulgaria, provided a declaration before a notary is signed.

The Rights/ duties of a sworn translator

The responsibility for the quality, the accuracy and truthfulness of the translation lies with the translation agency that signed the contract.

Legalisation / notarisation / Apostille

The translation can be legalized only if the translation agency has signed a contract with the Consular Department of the Ministry of Foreign Affairs and has deposited the documents (diploma of a philologist even of a graduate of a language school is regarded as sufficient) of its sworn translators together with their signatures. The translation needs to be printed with the letterhead and stamp of the agency. The Consular Department verifies the signature of the sworn translator - not the translation.

4.1.2 Literary translation

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	22 635
Total EU-27:	1 220 037

Figure 21 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3 Sign language interpreting

No reports were found about sign interpreting specifically referring to Bulgaria

4.2 Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3 Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4 Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year: 2006	
English:	256 939
German:	116 357
French:	45 690
Spanish:	14 321
Italian:	6 151
Total:	**439 458**

Figure 22 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year: 2006	
Zero:	59 598
One:	79 572
Two:	225 661
Three:	2 519
Four or more:	0

Figure 23 – Source: (Eurostat, 2009b)

Bulgarian National Statistics Institute	2007	Adult Education Survey 2007 - Main results

Usage of foreign languages

55.9% of the population in active working age (25-64) use actively or passively at least one foreign language. 40.2% of the population at the age of 25-64 use Russian, 20.7% English, 10.4% German and 9.0% French. The usage of English language is almost twice as frequent among the young people aged 25-35 (37.3%) than among those aged 35-49 (20.6%). The most rare usage of English (9.4%) is among people aged 50-64.

The Russian language, however, is used significantly more often among persons aged 35-49 (46.6%) and 50-64 (43.7%) than among the younger (26.6%). It is expected that 85.8% of the people with higher education use at least one foreign language, while the percentage for those with secondary education is 59.1% and for the persons with elementary and lower education only 20.8%. There are differences in foreign language usage regarding the employment status. Among the persons employed, the usage of foreign languages is much higher (63.6%) than among the unemployed (36.2%). The level of language usage among the economically inactive is 41.8% (Bulgarian National Statistics Institute, 2007, p. 5)

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Bulgaria

Some additional information on language teaching in Bulgaria is available in the report(s) above.

4.5 Conference Organisation

No publications referring specifically to this sector could be retrieved for Bulgaria.

4.6 Consultancy

No publications referring specifically to this sector could be retrieved for Bulgaria.

5. Questionnaire

5.1 Statistics on respondents from Bulgaria for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Bulgaria:	**24/1152**
Individuals and small enterprises:	22/24
Language service providers:	2/24
Language service departments:	0/24

6. Estimate of volume and value of language market

No data could be retrieved that allowed us to estimate the volume or value of the language market in Bulgaria.

Country fact sheet – Cyprus

1. Country facts

Year of EU entry:	2004
Political system:	Republic
Capital:	Nicosia
Official language(s):	Greek, English
Currency:	EUR - Euro
Population (million):	0.80
% of EU-27 total:	0.16%
Employment (million):	0.38
% of EU-27 total:	0.17%
Average gross annual earnings (€), 2006:	21,310
Level above/below EU-27 average:	-31.9%

2. Main actors

2.1 List of professional organisations contacted for the study

PANUTI - Pancyprian Union of Graduate Translators and Interpreters

2.2. List of universities offering studies in applied linguistics

University of CYPRUS (Department of English Studies)

3. Statistical data

3.1 National Statistics Office

Name of office:	Department of Statistics and Research Cyprus
Website:	http://www.mof.gov.cy/mof/cystat/statistics.nsf/index_en/index_en?OpenDocument
National coding system:	unknown
Coding system based on:	NACE 2
Code for translation	74851

and interpreting:	
Contacted?	Yes
Responded?	Yes
Data provided?	Yes
Data exploitable?	Yes

3.2 Other authorities contacted

Name of authority in English	**Responded ?**	**Data provided?**	**Data exploitable?**
Ministry of Finance	No	:	:
Department of the Registrar of Companies and Official Receiver (D.R.C.O.R.) of the Republic of Cyprus	No	:	:
: not applicable			

4. Materials collected per sector

4.1 Translation and Interpreting

4.1.1 General translation

Statistical Service of Cyprus	2009	Number of enterprises

Data provided by the National Statistics Office of Cyprus

Code: 74851 (Secretarial and translation activities and messenger services)	
Year	**Total number of enterprises**
2007	79

Figure 24 – Source: (Statistical Service of Cyprus, 2009)

Since the data above includes secretarial activities and messenger services, an estimate of the number of enterprises within translation and interpreting activities was performed based on the proportions provided by the French Institute of Statistics and Economic Studies (INSEE, 2007). The following table shows the proportion of translation and interpreting activities for 2007.

Translation and interpreting activities	
Year	**Total number of enterprises**
2007	26

If the proportions provided by INSEE are true for Cyprus, there are approximately 26 businesses whose main activity are translation and interpreting activities. Since the industrial classification code 74851 has different meanings in different countries, it is not known whether freelancers are included in the data provided.

Assuming that they are not included, and assuming the findings of the CNET study for France are applicable to other European countries (CNET, 2007), there would be 13 freelancers for every business, amounting to a total of just over **330** freelancers.

However, no assumptions can be made about the number of persons active in this sector and the total turnover.

Statistical Service of Cyprus	2009	Statistics on Business Services 2007

We were pointed to this report by the Statistical Service of Cyprus. The report contains some general information about business services but no data specifically relating to translation and interpretation.

4.1.2 Literary translation

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	371
Total EU-27:	1 220 037

Figure 25 – Source: (UNESCO, 2009)

4.1.3 Sign language interpreting

No report specifically relating to Cyprus could be found for this sector.

4.2 Subtitling and dubbing

No report specifically relating to Cyprus could be found for this sector.

4.3 Software localisation, website globalisation and language technology tool development

No report specifically relating to Cyprus could be found for this sector.

4.4 Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year	**2006**
English:	29 722
French:	11 468
Italian:	8 516
Spanish:	2 220
German:	1 032
Total:	**52 958**

Figure 26 – Source: (Eurostat, 2009a)

Council of Europe	2005	Language Education Policy Profile - Cyprus

The teaching of foreign languages is one of the five pillars of the Cypriot educational system. The most recent available statistics indicate that the 12 “most popular” languages spoken as first languages by students from newly arrived minorities who attend compulsory primary education in Cyprus are the following: English (36%), Bulgarian (4%), Romanian (4%), German (3%), Arabic (3%), Swedish (2%), French (2%), Finnish (2%), Georgian (2%), Filipino (2%) and Spanish (2%)

A range of other languages accounts for 9% of the population of “new” minorities in primary schools.

English is the sole language of instruction in 17 of 34 private secondary schools in Cyprus and English as a "second language" has a major role in Cypriot society. Between the age of 12 and 15, both English and French are compulsory at school. About three periods per week (3-3-3.5) are allocated for English and two for French. From September 2001, a minimum of 4 periods was allocated to foreign languages in the second and third years (Forms B and C) of the Lyceum. Students can choose among two languages: English, French, German, Italian, Russian, Spanish and Turkish. (Council of Europe, 2005, p. 16ff).

Statistics Cyprus	2008	Enrolments in part-time institutes by subject, level and sex

The following table shows enrolments in (non-formal) part-time institutes by foreign language and level for the academic year 2006/2007.

subject	Preprimary & primary	Secondary education		Adults	total
		Lower secondary	Upper secondary		
PUBLIC schools					
English	2 317	2 551	1 240	448	6 556
French	139	555	179	58	931
German	0	24	0	6	30
Italian	0	1	14	51	66
Russian	0	0	0	41	41
Greek	0	8	1 239	211	1 458
Greek for foreigners	0	0	0	169	169
Spanish	0	3	6	65	74
Turkish	5	27	80	629	741
PRIVATE schools					
English	11 893	8 670	5 529	567	26 659
French	50	222	95	17	384
German	19	34	53	34	140
Italian	0	0	7	11	18
Russian	21	11	0	15	47
Greek	69	50	574	143	836
Greek for foreigners	0	0	0	42	42
Spanish	0	0	3	1	4
Turkish	0	2	0	0	2
TOTAL	**16 497**	**17 424**	**18 319**	**4 499**	**56 739**

Figure 27 – Source: (Statistical Service of Cyprus, 2008)

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Cyprus
Statistical Service of Cyprus	2009	Economic Statistics on Education 2006

Additional information can be found in the reports above.

4.5 Conference Organisation

No publications referring specifically to this sector could be retrieved for Cyprus.

4.6 Consultancy

No publications referring specifically to this sector could be retrieved for Cyprus.

5. Questionnaire

5.1 Statistics on respondents from Cyprus for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Cyprus:	**2/1152**
Individuals and small enterprises:	2/2
Language service providers:	0/2
Language service departments:	0/2

6. Estimate of volume and value of language market

Based on the data provided by the authorities, and the data retrieved during the phase of secondary data collection, we do not have enough evidence to put forward an estimate of the volume and value of the language market in Cyprus. The only figure that could be estimated based on the data provided is that the total number of freelancers in the year 2007 active in translation and interpreting amounts to **330**.

Country fact sheet – Czech Republic

1. Country facts

Year of EU entry:	2004
Political system:	Republic
Capital:	Prague
Official language(s):	Czech
Currency:	CZK - CZK
Exchange rate as at 19.05.2009 (1 €=...):	26.92
Population (million):	10.30
% of EU-27 total:	2.09%
Employment (million):	4.92
% of EU-27 total:	2.25%
Average gross annual earnings (€), 2006:	8,284
Level above/below EU-27 average:	-73.5%

2. Main actors

2.1 List of professional organisations contacted for the study

ACTA - Association of Czech Translation Agencies
AJSCR - Czech Association of Language Schools
Bohemica.com - Czech Language and Culture Junction
Czech Centres (Ceske Centrum)
Czech Literary Translators' Guild
JTP - Union of Interpreters and Translators

2.2 List of universities offering studies in applied linguistics

Charles University - PRAHA (Institute of Translation Studies)
Masaryk University (Faculty of Arts)
Palacky University - OLOMOUC (Department of English and American Studies, Faculty of Arts)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Český statistický úřad
Acronym:	CSU
Name of office (English):	Czech Statistical Office
Website:	http://www.czso.cz/eng/redakce.nsf/i/home
National coding system:	CZ-NACE
Coding system based on:	NACE 2
Code for translation and interpreting:	74.85
Contacted?	Yes
Responded?	Yes
Data provided?	Yes, about language teaching. Data for translation and interpreting is included in the broader CZ-NACE code 74. Data extraction at a more detailed level is a payable service.
Data exploitable?	Partly

3.2 Other authorities contacted

Name of authority in English	Responded?	Data provided?	Data exploitable?
Ministry of Finance	No	:	:
Czech Chamber of Commerce	No	:	:
Ministry of Industry and Trade	No	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

Hemera, Elekes	2008	The Eastern European translation market

This report about the Eastern European translation market presents some general facts about the Czech Republic, Hungary, Poland, Romania, Slovakia and Slovenia. The following figure was provided about Czech market data.

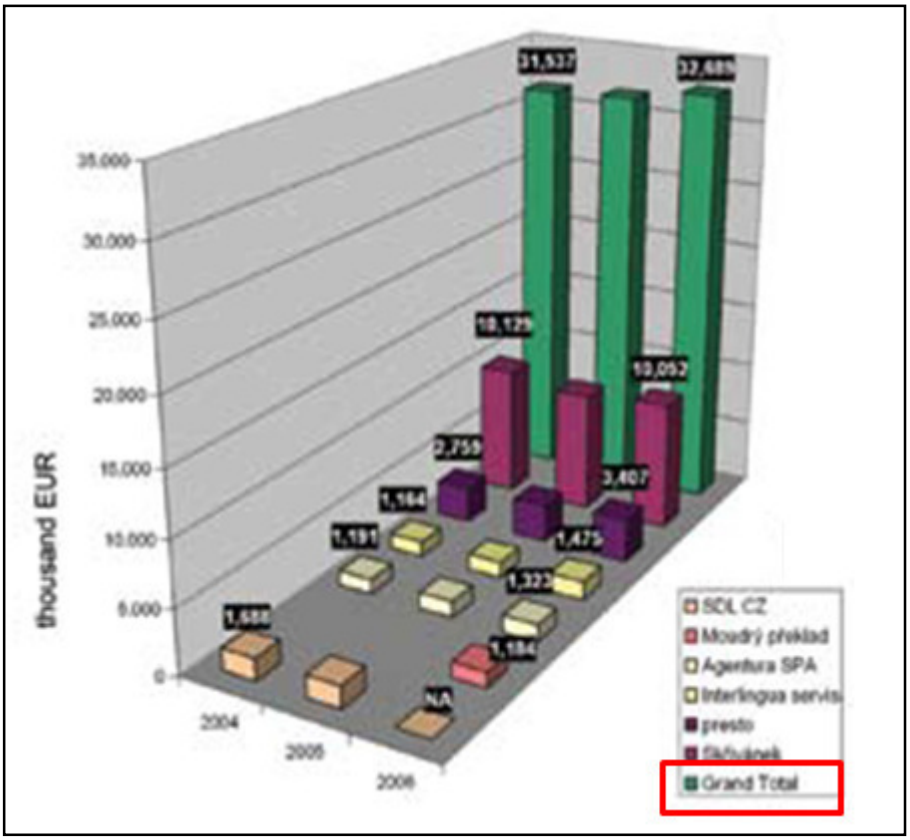


Figure 28 – Source: (Elekes & Hemera, 2008)

The quality of the image was quite poor and the data were not commented in the rest of the report. Therefore, only a very approximate interpretation of the figures was possible.

Assuming that the green columns of the first chart represent the total turnover, we can assume that between 2004 and 2006 the total turnover for the Czech Republic has increased from approximately **31 million €** to **33 million €**. Provided this trend remained constant until 2008, the market would be worth **35 million €** in 2008.

Assuming that this statistic does not account for freelancers, and applying the figures retrieved by CNET for France (CNET, 2007), the market could be worth an additional **23.3 million €**, adding up to a total of **58.3 million €**.

However, this figure is unreasonably low considering that two of the largest LSPs worldwide are headquartered in the Czech Republic: Moravia with a total turnover of 31.5 million € in 2008 (Beninatto & Kelly, 2009) and Skrivanek with a total turnover of 22 million € in 2007 (Beninatto & DePalma, 2008).
We assume that these two companies have not been included in the report cited by Hemera and Elekes and are therefore adding their turnover to the total turnover estimated for 2008. The resulting turnover amounts to **111.8 million €.**

EUATC - European Union of Associations of Translation Companies	2009	Practice in parts of Europe on sworn translations, notorisation and apostille

Educational / other requirements: What it takes to be accepted as a sworn/authorised/official translator

Sworn translators are nominated by Regional Tribunals. To be eligible, they have to demonstrate knowledge of the language through a diploma or state exam.

The Rights/ duties of a sworn translator

Sworn translators are not necessarily good translators. They have to work in a prioritarian way for tribunals, police and public bodies and get paid according to prices regulated by these authorities.

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	800-1 000
Association members (lit. trans. only):	450-500
Number of (new) books published per year:	approx. 18 000
Percentage of translations:	33%
Number of new works of literature per year:	approx. 4 000
Percentage of translations in literature:	approx. 80%
Average annual income (turnover) of literary translators (€):	5 900
Average annual gross income of literary translators (€):	4 425
Average gross income in the manufacturing and services sectors^ (€):	8 284
Per capita GDP in terms of PPS^ (€):	17 100
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	53%
*: Figures from 2005 or earlier. ^: Source: Eurostat 2005/2006 data	

Figure 29 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	47 316
Total EU-27:	1 220 037

Figure 30 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Czech Sign Language
Sign language recognised?	1998
Deaf sign language users:	2 500
Number of sign language interpreters currently working:	150
Hourly rate (€):	9.0
Interpreter organisation:	Ceska Komora tlumocniku znakoveho jaZY Ka

Figure 31 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4 Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	2006
English:	351 152
German:	271 205
French:	37 023
Spanish:	14 136
Italian:	1 384
Total:	674 900

Figure 32 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	2006
Zero:	16 253
One:	250 570
Two:	205 379
Three:	6 125
Four or more:	0

Figure 33 – Source: (Eurostat, 2009b)

AJSCR - Czech Association of Language Schools	2009	Czech Association of Language schools - information compiled by Czech Business Weekly BOL (published by STANFORD)

Out of a total of 16 language schools, the average number of teachers is 137, of which 57 are working permanent and 79 are working as external teachers. Out of a total of 16 language schools, the average number of students is 2993. The average number of students per teacher out of a total of 16 language schools is 28 (AJSCR, 2009)

Languages taught:

English: at all language schools

Czech: at all language schools

German: at 13 language schools out of 16

French: at 13 language schools out of 16

Spanish: at 13 language schools out of 16

Russian: at 13 language schools out of 16

Italian: at 10 language schools out of 16

National Statistics Office of the Czech Republic	2009	Language Schools with state exam

Language schools with state language exam accreditation – basic overview, by territory		
State: 30.9.2007		
Territory: Czech Republic total		
Independent schools*	**Total number of courses organised by school**	**Total number of pupils**
9	1 436	14 579
*Language schools are separate and are set up as part of primary or secondary school.		

Figure 34 – Source: (Czech Republic NSO, 2009)

National Statistics Office of the Czech Republic	2009	Language school by type and language

Language schools - according to type of course and language		
state: 30.9.2007		
Language	**courses**	**students**
English	823	2 247
French	133	1 166
German	231	2 062
Russian	35	244
Spanish	80	707
Italian	31	302
Other	103	870
Total	1436	7598

Figure 35 – Source: (Czech Republic NSO, 2009)

Industry Canada	2007	The language training market in the Czech Republic

An abundance of information about the public and private language teaching sector in the Czech Republic is included in the abovementioned report compiled by the consulting company GfK Praha on behalf of Industry Canada.

According to the findings of the report, the Czech language training market is fragmented and strongly competitive due to a wealth of domestic and foreign language schools.

In the tertiary education sector, language tuition can be split into three types of schools:

1) Non-degree granting (NDG) Vocational Schools

2) University and College Education

3) On-the-job Training: typically, larger corporations and foreign companies tend to offer such training. According to the report, the demand for corporate language training is rising faster than for general language courses.

Languages:

English, German, French, Spanish and Russian comprise 89% of all language school lessons offered in the country. The proficiency of English among the Czech population is growing but still below the EU-average. Czechs are most likely to speak German, followed by English and Russian.

European language standards:

In 2007, approximately 40% of all language schools in the Czech Republic based the content and delivery of their language courses on the principles outlined in the Common European Framework of Reference (CEFR) and this percentage is steadily increasing.

Working opportunities for teachers:

In 2007, the number of language teachers (both foreign and domestic) working in the Czech Republic was insufficient. For this reason, Czech language schools seek co-operative ventures with foreign language schools.

As regards remuneration, foreign teachers are paid as Czech teachers at approximately CAD 663 – CAD 918 per month before taxes and other contributions.

Competitive environment:

The Czech language market is highly fragmented, with hundreds or language schools and agencies competing for market share. Among the big players of the language teaching segment:

- The Caledonian School, employing 210 language teachers and enrolling more than 7000 students across the country

- The Bell School, a private British language school in the Czech Republic.

- The Akcent International House Prague
- The Berlitz School of Languages
- London Institute of Praha
- Glossa, Channel Crossings, Ulrych Language Studio, Amadeus, Elvis Language School, Bohemia Institut, Lngea Centrum, Prague Language Center, Tutor, Sentia, Threshold Training Associates, St. James Language Center, Polyglot, James Cook Languages, Languages at Work, Cloverleaf, London School of Modern Languages, Rolino and Ars Linguarum.

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Czech Republic

Some additional information on language teaching in the Czech Republic is available in the report(s) above.

5. Questionnaire

5.1. Statistics on respondents from the Czech Republic for each target group

Total number of respondents based in Czech Republic	**28/1152**
Individuals and small enterprises:	17/28
Language service providers:	11/28
Language service departments:	0/28

6. Estimate of volume and value of language market

No data could be retrieved that allowed us to estimate the number of businesses, persons employed or freelancers active in the country.

Based on the data collected through secondary research the value of the market of translation and interpreting can be estimated at **111.8 million €** in 2008 (including freelancers).

Country fact sheet – Denmark

1. Country facts

Year of EU entry:	1973
Political system:	Constitutional monarchy
Capital:	Copenhagen
Official language(s):	Danish
Currency:	DKK - Danish Krone
Exchange rate as at 19.05.2009 (1 €=...):	7.45 DKK
Population (million):	5.40
% of EU-27 total:	1.09%
Employment (million):	2.80
% of EU-27 total:	1.28%
Average gross annual earnings (€), 2006:	48,307
Level above/below EU-27 average:	54.30%

2. Main actors

2.1. List of professional organisations contacted for the study

Association of Danish Authorized Translators
Danish Cultural Institute (Det Danske Kultur Institut)
Danish National Association of Teachers
DOF - Danish Translators' Association (Dansk Oversætterforbund)
DT - Danish Association of State-authorised Translators and Interpreters (Dansk Translatørforbund)
FBO - Danish Union of Journalists
Union of Communication and Language Professionals (Forbundet Kommunikation og Sprog)

2.2. List of universities offering studies in applied linguistics

COPENHAGEN Business School (Institute for Language Studies and Knowledge Technology)
Handelshøjskolen i Aarhus (Aarhus School of Business) (Department of Language and Business Communication)

3. Statistical data

3.1 National Statistics Office

Name of office (original language):	Denmarks Statistik
Name of office (English):	Statistics Denmark
Website:	http://www.dst.dk/
National coding system:	unkown
Coding system based on:	NACE rev. 2
Code for translation and interpreting:	unknown
Contacted?	Yes
Responded?	Yes
Data provided?	Yes, helped extracting data from website
Data exploitable?	Fully

3.2. Other authorities contacted

Name of authority in English	**Responded?**	**Data provided?**	**Data exploitable?**
Ministry of Finance	No	:	:
Danish Commerce and Companies Agency	Yes	No (paid service. Referred us to Statistics Denmark)	:
Danish Ministry of Education	Yes	No (referred us to Statistics Denmark)	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

Statistics Denmark	2006	Statistics on businesses, employees, turnover, etc

code: 748520 (Translation and interpretation activities)						
	Actual data				**Estimate**[4]	
	2003	**2004**	**2005**	**2006**	**2007**	**2008**
Number of enterprises	659	749	780	808	868.5	916.3
Number of persons employed	1 100	1 229	1 301	1 388	1489	1582
Of whom employees	492	531	577	644	687	737
Turnover (DKK million)	697	753	857	886	966	1033
Turnover (€ million)	94	101	115	119	130	139
Turnover per person employed (DKK 1 000), average	657	626	667	643	648	648
Turnover per person employed (€ 1 000), average	88.2	84.0	89.5	86.3	87	87
Wages per employee (DKK 1 000), average	385	374	386	392	393	396
Wages per employee (€ 1 000), average	51.7	50.2	51.8	52.6	52.7	53.1
Turnover per enterprise* (€ 1 000)	142.0	134.9	147.5	147.2	149.3	151.3
* manually calculated						

Figure 36 – Source: (Statistics Denmark, 2006)

It is unclear whether freelancers are included in the data above. If freelancers were not included, the turnover would increase to **232 million €** (applying the statistic according to which freelancers account for 40% of the total turnover of the translation and interpretation market) and in total **11 700** freelancers had to be added to the number of persons employed.

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	~~
Association members (lit. trans. only):	190
Number of (new) books published per year:	6 000
Percentage of translations:	60%
Number of new works of literature per year:	2 000
Percentage of translations in literature:	60%
Average annual income (turnover) of literary translators (€):	31 400
Average annual gross income of literary translators (€):	23 550

[4] Figures for 2008 have been obtained through linear regression from data for 2003 – 2006.

Average gross income in the manufacturing and services sectors^ (€):	47 529
Per capita GDP in terms of PPS^ (€):	29 100
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	50%
*: Figures from 2005 or earlier. ^: Source: Eurostat 2005/2006 data ~~ : No data available	

Figure 37 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	63 801
Total EU-27:	1 220 037

Figure 38 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Danish Sign language
Sign language recognised?	No
Deaf sign language users:	5000
Number of sign language interpreters currently working:	200
Hourly rate (€):	30.0
Interpreter organisation:	FTT - The Association for Sign Language Interpreters (Foreningen at Tegnsprogstolke)

Figure 39 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
English:	19 3388
German:	10 2101
Spanish:	29 061
French:	23 475
Italian:	1 917
Total:	349 942

Figure 40 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year	**2006**
Zero:	7 538
One:	116 815
Two:	77 561

Three:	26 352
Four or more:	0

Figure 41 – Source: (Eurostat, 2009b)

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Denmark

Some additional information on language teaching in Denmark is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Denmark.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Denmark.

5. Questionnaire

5.1. Statistics on respondents from Denmark for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Denmark:	**27/1152**
Individuals and small enterprises:	24/27
Language service providers:	2/27
Language service departments:	1/27

6. Estimate of volume and value of language market

Based on the data available from the national authorities for 2006, the following estimate of the volume and the value of the translation and interpreting market in Denmark for 2008 was retrieved:

Estimated volume (total number of persons employed in translation and interpreting activities): approximately **1 580** persons employed in companies and **11 700** freelancers.

Estimated value (total turnover of translation and interpreting activities): **139 million €** for companies and **93 million €** attributable to freelancers, amounting to a total of **232 million €.**

Country fact sheet – Estonia

1. Country facts

Year of EU entry:	2004
Political system:	Republic
Capital:	Tallinn
Official language(s):	Estonian
Currency:	EEK - Estonian Kroon
Exchange rate as at 19.05.2009 (1 €=...):	15.65
Population (million):	1.40
% of EU-27 total:	0.28%
Employment (million):	0.66
% of EU-27 total:	0.30%
Average gross annual earnings (€), 2006:	:
Level above/below EU-27 average:	:
: not available	

2. Main actors

2.1. List of professional organisations contacted for the study

AETC - Association of Estonian Translation Companies
EATE - Estonian Association of Teachers of English
ETTL - Estonian Association of Translators and Interpreters

2.2 List of universities offering studies in applied linguistics

EUROUNIVERSITY (Translation and Interpretation Faculty)
TALLINN University (Interpreter and Translator Training Centre)
University of TARTU (Translation Centre)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Statistikaamet
Acronym:	ESA
Name of office (English):	Statistics Estonia
Website:	http://www.stat.ee/
National coding system:	EMTAK 2008
Coding system based on:	NACE 2
Code for translation and interpreting:	74.30 (Translation and interpretation activities)
Contacted?	Yes
Responded?	Yes
Data provided?	Yes
Data exploitable?	Yes

3.2 Other authorities contacted

Name of authority in English	Responded?	Data provided?	Data exploitable?
Ministry of Finance	No	:	:
Estonian Chamber of Commerce & Industry	No	:	:
Ministry of Justice Centre of Registers and Information Systems	No	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

Statistics Estonia	2008	Response from National Statistics Office

Code 74.30 (translation and interpretation activities)					
	2005	**2006**	**2007**	**2008**	**Average yearly growth* (%)**
Total number of businesses	12	16	19	28	33.15%
Total number of persons employed	48	75	112	150	46.50%
Average number of persons employed per business*	4.0	4.7	5.9	5.4	
Turnover	Data extraction not possible.				
* manually calculated					
The total number of businesses includes undertakings, sole proprietors and non-profit organisations					

Figure 42 – Source: (Statistics Estonia, 2008)

Based on these figures alone, and due to the fact that Estonia has entered the EU relatively recently and therefore data is not likely to follow EU-averages, no further estimates can be retrieved for Estonia.

Assuming that the data above does not include freelancers and if the findings from the CNET report are applicable to Estonia (CNET, 2006), the estimated number of freelancers would reach **370**.

4.1.2. Literary translation

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	13 994
Total EU-27:	1 220 037

Figure 43 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Estonian Sign Language
Sign language recognised?	2007
Deaf sign language users:	1500
Number of sign language interpreters currently working:	27
Hourly rate (€):	6.4
Interpreter organisation:	Eesti Viipekeele Tolkide Uhing (EVTU)

Figure 44 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4 Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
English:	53 473
German:	22 058
Estonian:	17 782
French:	2 687
Finnish:	2 507
Swedish:	536
Spanish:	119
Total:	99 164

Figure 45 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	**2006**
Zero:	0
One:	11 081
Two:	30 219
Three:	18 522
Four or more:	1 211

Figure 46 – Source: (Eurostat, 2009b)

Statistics Estonia	2008	Response from National Statistics Office

As regards language teaching, Statistics Estonia sent us the following table:

Code 85.59 (Other education n.e.c.)					
	2005	**2006**	**2007**	**2008**	**Average yearly growth* (%)**
Total number of businesses in language teaching	89	100	122	133	14.5%
Total number of persons employed	525	559	631	583	3.9%
* manually calculated					
The total number of businesses includes undertakings, sole proprietors and non-profit organisations					

Figure 47 – Source: (Statistics Estonia, 2008)

The total number of persons employed most probably includes staff other than language teachers. Moreover, external teachers are likely to be used as well. Therefore, the data provided by Statistics Estonia could not be exploited any further.

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Estonia

Some additional information on language teaching in Estonia is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Estonia.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Estonia.

5. Questionnaire

5.1. Statistics on respondents from Estonia for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Estonia:	**12/1152**
Individuals and small enterprises:	9/12
Language service providers:	2/12
Language service departments:	1/12

6. Estimate of volume and value of language market

Based on the data provided by the national statistics office of Estonia, it is only possible to state the total number of persons employed in translation and interpreting activities for 2008: **150** persons are employed by companies and in addition there are **330** freelancers.
No estimates can be retrieved for turnover.

Country fact sheet – Finland

1. Country facts

Year of EU entry:	1995
Political system:	Republic
Capital:	Helsinki
Official language(s):	Finnish, Swedish
Currency:	EUR - EUR
Population (million):	5.30
% of EU-27 total:	1.07%
Employment (million):	2.49
% of EU-27 total:	1.14%
Average gross annual earnings (€), 2006:	34,080
Level above/below EU-27 average:	8.9%

2. Main actors

2.1. List of professional organisations contacted for the study

CIMO - Centre for International Mobility
Finnish Cultural and Academic Institutes
Finnish Institute in London
Media translators' section of the Finnish Union of Journalists
SKTL - Finnish Association of Translators and Interpreters
SKTOL - Association of Finnish Translation Companies (Suomen käännöstoimistojen liitto ry)
SUKOL - Federation of Foreign Language Teachers in Finland (Suomen kieltenopettajien liitto ry)

2.2 List of universities offering studies in applied linguistics

MonAKO (Multilingual communication programme; NB: in 2009 the unit will merge with the university's Department of Translation Studies.)
Universität JOENSUU (Faculty of humanities, Department of foreign languages and translation studies)
Université de TURKU (Center for Translation and Interpreting)
University of TAMPERE (School of Modern Languages and Translation Studies (Department of Translation Studies))
University of Vaasa (Department of Modern Finnish and Translation)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Tilastokeskus
Name of office (English):	Statistics Finland
Website:	http://www.stat.fi/
National coding system:	unknown
Coding system based on:	NACE 2
Code for translation and interpreting:	74.30 (Translation and Interpretation activities)
Contacted?	Yes
Responded?	Yes
Data provided?	Yes
Data exploitable?	yes

3.2. Other authorities contacted

Name of authority in English	**Responded?**	**Data provided?**	**Data exploitable?**
Ministry of Finance	No	:	:
Central Chamber of Commerce	No	:	:
Finland Business Register	No	:	:
National Board of Patents and Registration of Finland Trade	No	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

Statistics Finland	2007	Response from NSO on enterprises

The following data was provided by Statistics Finland upon our request

Code: 74853 (Translation and interpretation activities)

	Actual data				estimate
	2004	**2005**	**2006**	**2007**	**2008**
Enterprises	813	844	954	1 056	1127
Personnel	1 204	1 090	1 221	1 454	1463
Turnover (1 000 EUR)	80 009	76 584	89 655	117 259	122 082
Wages	22 974	21 139	23 333	29 549	29 728.50
Wage/employee	28.10	31.90	31.30	32.30	33.90
Turnover/enterprise (1 000 EUR)	98.40	90.70	94.00	111.00	108.80
Turnover/employee (1 000 EUR)	66.40	70.20	73.40	80.60	84.10
This statistics includes enterprises and establishments that operated for more than six months in the reference year and employed more than one-half of a person or had a turnover in excess of an annually specified statistical limit (9 636 EUR in 2007)					

Figure 48 – Source: (Statistics Finland, 2007)

Most probably, this statistics does not include freelancers. If the turnover generated by freelancers represented 40% of the market (CNET, 2007), the total turnover would increase from **122 million €** to **203 million €** (of which 81 million € would belong to freelancers) and an additional **14 440** freelancers would have to be added to the number of persons employed.

This estimated range of turnover (122 million € - 203 million €) is larger than the turnover of **96 million €** estimated by SKTOL in 2004[5] (EUATC, 2005).

We therefore assume that freelancers are included in the figures provided by the statistics office and that the total turnover of translation and interpretation activities in Finland amounts to **122 million €**.

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	500-600
Association members (lit. trans. only):	400
Number of (new) books published per year:	4 070
Percentage of translations:	approx.50%

[5] In 2004, SKTOL estimated the translation market at 61 million €. Assuming a yearly growth of 7.5% (Beninatto & DePalma, 2007) and adding interpreters (representing 15%) to the total, the figure reaches 96 million €.

Number of new works of literature per year:	1 899
Percentage of translations in literature:	66%
Average annual income (turnover) of literary translators (€):	19 330
Average annual gross income of literary translators (€):	14 500
Average gross income in the manufacturing and services sectors^ (€):	33 290
Per capita GDP in terms of PPS^ (€):	26 200
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	44%
*: Figures from 2005 or earlier. ^: Source: Eurostat 2005/2006 data	

Figure 49 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	44 378
Total EU-27:	1 220 037

Figure 50 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Finnish Sign Language
Sign language recognised?	1995(Sign Languages of Europe- Future Chances, Vera Krausneker, April 2000)
Deaf sign language users:	3000
Number of sign language interpreters currently working:	450

Hourly rate (€):	18.9
Interpreter organisation:	Suomen Viitomakielen Tulkit (SVT)

Figure 51 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Statistics Finland	2007	Response from NSO on education

The following table was provided by Statistics Finland about language teaching:

Code: 80423 (Language schools and centres)					
	Actual data				**Estimate**
	2004	**2005**	**2006**	**2007**	**2008**
Enterprises	117	120	121	123	125
Personnel	453	596	609	630	708
Turnover (in 1 000 EUR)	26 637	35 675	28 153	27 796	28554
Wages (in 1 000 EUR)	11 154	15 232	11 456	11 580	11731
Wage/employee (in 1 000 EUR)	28.5	28.1	20.7	20.7	16.8

Turnover/enterprise (in 1 000 EUR)	227.7	297.3	232.7	226	228.5
Turnover/employee (in 1 000 EUR)	58.8	59.9	46.2	44.1	37.8

Figure 52 – Source: (Statistics Finland, 2007)

Based on the data above, we estimate that there are **125** businesses or other entities in Finland whose main activity is language teaching. As regards teachers, the estimated number of personnel for 2008 amounts to **708**. However, this number most likely includes personnel not involved in language teaching. In addition, it is most likely that the school employs external teachers as well.

In addition to the table above, we were provided with a set of tables about the number of students registered in language courses in higher education. The summary of the tables can be found below.

Number of students per degree and language, year 2007					
	Number of Students				
	BA	**MA**	**Licenciate**	**PhD**	**Total**
English	1250	1699	28	148	**3125**
Finnish	964	1289	30	144	**2427**
Swedish	795	1009	11	82	**1897**
German	621	845	12	72	**1550**
French	337	450	6	32	**825**
Russian	245	441	1	33	**720**
Classic languages	81	127	10	32	**250**
Slavic languages	86	143	0	17	**246**
Spanish	105	123	1	15	**244**
Italian	100	63	4	9	**176**
Baltic-finnish languages	17	39	0	9	**65**
Other languages	2	58	0	0	**60**
Sign language	18	25	0	1	**44**
Lappish	8	23	0	8	**39**
Baltic languages	13	11	0	0	**24**
Hungarian	0	4	0	7	**11**
Total	**4642**	**6349**	**103**	**609**	**11703**

Figure 53 – Source: (Statistics Finland, 2007)

The table shows that English, Finnish, Swedish, German and French are the languages with most enrolments, representing 85% of the total number of students enrolled in language degrees.

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Finland

Some additional information on language teaching in Finland is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Finland.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Finland.

5. Questionnaire

5.1. Statistics on respondents from Finland for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Finland:	**11/1152**
Individuals and small enterprises:	8/11
Language service providers:	3/11
Language service departments:	0/11

6. Estimate of volume and value of language market

Estimated volume (total number of persons employed in translation and interpreting activities, 2008): **1460** persons employed.

Estimated value (total turnover of translation and interpreting activities, 2008): **122 million €**

Country fact sheet – France

1. Country facts

Year of EU entry:	Founding member
Political system:	Republic
Capital:	Paris
Official language(s):	French
Currency:	EUR - EUR
Population (million):	63.70
% of EU-27 total:	12.90%
Employment (million):	25.64
% of EU-27 total:	11.74%
Average gross annual earnings (€), 2006:	31,369
Level above/below EU-27 average:	0.2%

2. Main actors

2.1. List of professional organisations contacted for the study

APIL - Association of professionals of the language industry (Association des Professionnels des Industries de la Langue)
APLV - French Association of Teachers of Modern Languages (Association des Professeurs de Langues Vivantes)
APROTRAD - Professional association of careers in translation (Association professionelle des métiers de la traduction)
ATAA - French Association of Audiovisual Translators (Association des Traducteurs / Adaptateurs de l'Audiovisuel)
ATALA - Association for Natural Language Processing (Association pour le traitement automatique des langues)
ATIA - Association of Professional Translators and Interpreters in Aquitaine (Association des Traducteurs et Interprètes Professionnels d'Aquitaine)
ATLF - Association of literary translators in France (Association des traducteurs littérares de France)
CETIECAP - Company Expert translators and interpreters at the Court of Appeal of Paris (Compagnie des Experts Traducteurs et Interprètes en Exercice près la Cour d'Appel de Paris)
CNET - National Chamber of Translation Companies (Chambre Nationales des Enterprises de Traduction)

French national union of professional translator (syndicat national des traducteur professionnel)
International Language Schools (EF Ecole Internationale de Francais)
proTLS - Professional Association of Treatment of Specialized Languages (Association des Professionnels du Traitement de Langages Spécialisés)
SFT - French Society of Translators (Société française des Traducteurs)
UNETICA - national union of experts in translation and interpreting at the Courts of Appeal (Union Nationale des Experts Traducteurs- Interprètes près les Cours d'Appel)
Alliance Francaise

2.2 List of universities offering studies in applied linguistics

Ecole supérieure d'interprètes et de traducteurs - ESIT (Ecole supérieure d'interprètes et de traducteurs - ESIT)
INALCO - PARIS (Institut national des langues et civilisations orientales - INALCO)
Institut de Traducteurs, d'Interprètes et de Relations Internationales (ITI-RI) Strasbourg
ISIT - PARIS (Institut supérieur de traduction et d'interprétation - ISIT)
Université Catholique d'Angers (Institut de Langues Vivantes d'Angers (IPLV))
Université catholique de Lyon (ESTRI –Ecole supérieure de traduction et relations internationales)
Université d'Angers (UFR Lettres, Langues et Sciences Humaines)
Université de Cergy-Pontoise (UFR Langues)
Université de Haute Alsace - Mulhouse (Faculté des Lettres, Langues et Sceinces Humaines)
Université de la Sorbonne Nouvelle - Paris III (UFR Langues étrangères appliquées)
Université de Lille 3 (UFR Langues étrangères appliquées)
Université de Metz (UFR Lettres et langues)
Université de Montpellier 3 (UFR Langues étrangères appliquées)
Université de Nice - Sphia Antinopolis (Faculté des Lettres, Arts et Sciences humaines)
Université de Paris 8 (UFR Sciences du Languages)
Université de Paris Diderot – Paris 7 (UFR Etudes interculturelles de langues appliquées)
Université de Pau et des Pays de l'Adour (UFR Lettres)
Université de PROVENCE AIX-MARSEILLE I (Département LEA)
Université de Rennes 2 (UFR Langues)
Université de Strasbourg 2 (UFR des Langues et Sciences Humainess appliquées)
Université de TOULOUSE-Le Mirail (IUP de Traduction - Interpretation)
Université d'Orléans (UFR Lettres, Langues et Sciences Humaines)
Université du Littoral - Boulogne (Centre Universitaire St Louis 2)
Université Jean Monnet - Saint-Etienne (Faculté d'Arts, Lettres, Langues)
Université Lille 3 - VILLENEUVE D'ASCQ (UFR Angellier (langues, littératures et civilisations des pays anglophones))

Université Lumière LYON 2 (Centre de recherche en terminologie et traduction)
Université Michel de Montaigne - Bordeaux 3, (UFR Langues étrangères et langues étrangères appliquées)
Université Stendhal - GRENOBLE (DESS « Traduction spécialisée et production de textes multilingues »)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Institut national de la statistique et des études économiques
Acronym:	INSEE
Name of office (English):	National Institute of Statistics and Economic Studies
Website:	http://www.insee.fr/fr/default.asp
National coding system:	NAF
Coding system based on:	NACE 1.1
Code for translation and interpreting:	74.8F (Secretariat et traduction)
Contacted?	Yes
Responded?	Yes
Data provided?	Yes
Data exploitable?	Fully

3.2. Other authorities contacted

Name of authority in English	**Responded?**	**Data provided?**	**Data exploitable?**
Ministry of Culture and Communication	Yes	Yes	Yes
Ministry of Economy, Industry and Employment	Yes	No (referral to APIL and technolangue study)	:
National Institute of Industrial Property	No	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

INSEE - French National Institute of Statistics and Economic Studies	2005	Les services en France, édition 2005/2006 (FRENCH)
INSEE - French National Institute of Statistics and Economic Studies	2006	Fiches thématiques: Les Services en France, édition 2007 (FRENCH)

Code: 74.8F (secretarial and translation activities)					
	Actual data		**estimate**		
	2003	**2005**	**2006**	**2007**	**2008**
Number of businesses	10289	13 840	15616	17391	19167
Persons employed	18086	26 426	30596	34766	38936
Turnover (M€)	1024	1 725	2076	2426	2777
Wage per employee (k€)	no data	26	-	-	-

Figure 54 – Source: (INSEE, 2006; INSEE, 2009)

Code: translation and interpretation					
	Actual data		**estimate**		
	2003	**2005**	**2006**	**2007**	**2008**
Number of businesses	3448	4 638	5233	5828	6423
Persons employed	4385	6 407	7418	8429	9440
Turnover (M€)	269	453	545	637	729
Wage per employee (k€)	No data	35	-	-	-

Figure 55 – Source: (INSEE, 2006; INSEE, 2009)

Data provided by INSEE allowed to retrieve the proportion of "translation and interpretation activities" out of the broader "secretarial and translation activities" for other countries:

Proportion of "translation and interpretation activities" out of "secretarial and translation activities"	
Number of businesses:	33.5%
persons employed:	24.2%
Turnover:	26.3%

We assume that freelancers are included in Figure 55 since the findings of the CNET report 2006 (see below) estimated a total of 400 translation companies in France and the data in the table above is exceeding these figures by far. Also, with an average of 13 freelancers for every business, the number of freelancers would reach over 80 000, which is unrealistic considering that CNET obtained a figure of 5 000 for 2006. In addition, if the turnover above was to be increased by the proportion of turnover generated by freelancers, the figure would be over 1.2 billion € which – again – exceeds by far findings from other reports.

Therefore, our estimated turnover for translation and interpretation activities in France amounts to **729 million €**. This figure seems plausible compared to the estimates provided by CNET in the 2004 EUATC report (EUATC, 2005): in 2004, the translation market was estimated at between 200 million € and 500 million €. Considering a 7.5% annual growth and the addition of interpreters (which account for 15%) to the statistic, the turnover range for 2008 is between 314 million € and 786 million €. According to the EUATC estimate, our turnover range is placed in the higher end of the range.

CNET - National Chamber of Translation Companies	2006	Resultats questionnaire observatoire de la traduction 2006 (FRENCH)

The National Chamber of Translation Companies (CNET) provides a study of the translation market in France, from the viewpoint of translation agencies. As this survey is carried out fairly regularly, some lessons about market development can be drawn. Moreover, the study includes work performed by Boucau on behalf of EUATC into the findings.

In 2004, CNET estimated the French translation market between **200 million €** and **500 million €**, of which approximately two-thirds are generated by translation enterprises and one-third by freelancers. This figure grew to between **360 million €** and **440 million €** in 2005.

In 2005, EUATC estimated the translation market (excluding institutional translations and language service departments) at **735 million €.**

Findings from the report:

1) Translation enterprises: total turnover of **240 million €** realised by **389** businesses.

2) Freelancers: total turnover **160 million €** realised by an estimated **5000** freelance translators, which leads to an average turnover per person of **32 000 €**.

The resulting total turnover for the translation market in France amounts to **400 million €** for 2006.

EUATC - European Union of Associations of Translation Companies	2009	Practice in parts of Europe on sworn translations, notorisation and apostille

Educational / other requirements: What it takes to be accepted as a sworn/authorised/official translator

The French courts hold a meeting to appoint new sworn translators each year (if it is necessary to replace or increase the number of existing ones). The selection criteria are unclear, which leads to a serious problem in the French system of sworn translation: translators are not always qualified, which leads to poor and unreliable translations.

The Rights/ duties of a sworn translator

Unlike all other translators, sworn translators are officially appointed and appear on an official list.

Legalisation / notarisation / Apostille

In France, sworn translations and legalized translations are 2 different issues. Legalized documents are only and mainly required for export, sworn translations are more widely required.

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	~~
Association members (lit. trans. only):	950
Number of (new) books published per year:	approx. 40 000
Percentage of translations:	14.40%
Number of new works of literature per year:	8 284
Percentage of translations in literature:	41.40%
Average annual income (turnover) of literary translators (€):	33 695
Average annual gross income of literary translators (€):	25 270
Average gross income in the manufacturing and services sectors^ (€):	30 520
Per capita GDP in terms of PPS^ (€):	25 500
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	83%
*: Figures from 2005 or earlier. ^: Source: Eurostat 2005/2006 data ~~ : No data available	

Figure 56 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	163 480
Total EU-27:	1 220 037

Figure 57 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	French Sign Language
Sign language recognised?	2005
Deaf sign language users:	100 000
Number of sign language interpreters currently working:	180
Hourly rate (€):	20.0
Interpreter organisation:	Association Francaise des Interpretes en Langue des Signes (AFILS)

Figure 58 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

In France, 109 companies have been able to be identified as falling within the perimeter of language engineering: the generated turnover represents approximating **78.8 million €**, 16% of the European market. France is the second leading country after the United Kingdom.

On the language tools market, the average turnover of the smallest companies is **300 000 €**. For the 20 companies positioned at the "hard" core of the language technologies sector, the average turnover is **5 billion €.**

If correct, this number most certainly includes voice technology, spellcheckers etc., as it by far exceeds all other figures in all other sources of information consulted.

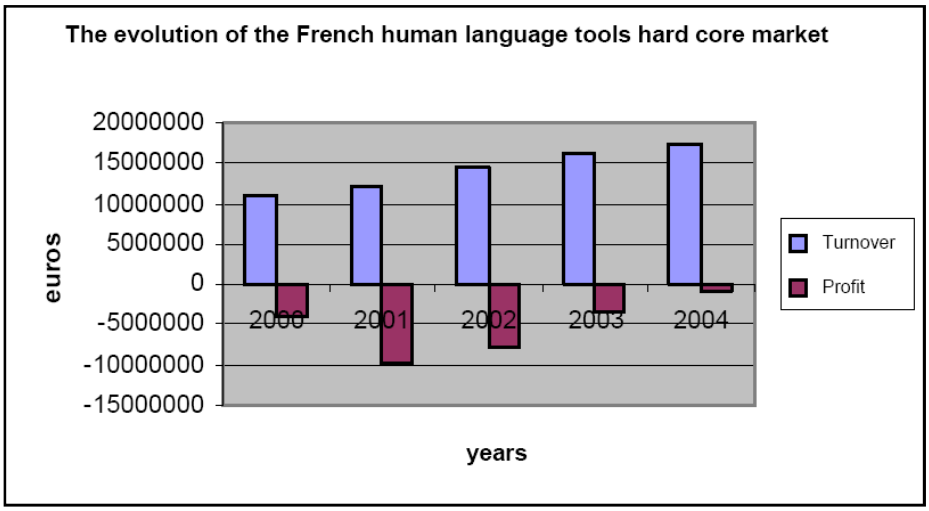


Figure 59 – Evolution of the French human language tools market. Source: (technolangue, 2007)

The core market of language technologies in France is estimated to reach **45.8 million €** in 2010 (high estimate).

CNET - National Chamber of Translation Companies	2006	Resultats questionnaire observatoire de la traduction 2006 (FRENCH)
DGLFLF - Délégation générale à la langue française et aux langues de France	2007	La langue au coeur du numérique - les enjeux culturels des technologies de la langue

Some information on this sector is available in the reports above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
English:	2 298 942
Spanish:	1 046 821
German:	380 433
Italian:	128 102
Portuguese:	6 597
Dutch:	766
Polish:	220
Total:	**3 861 881**

Figure 60 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	**2006**
Zero:	19 849
One:	872 937
Two:	1 368 921
Three:	98 968
Four or more:	0

Figure 61 – Source: (Eurostat, 2009b)

Butašová et al	2007	Conception of Teaching Foreign Languages at Primary Schools and Secondary Schools

In France, a minimum of one hour per week and a maximum of two hours per week are allocated to the teaching of a foreign or regional language at basic level, based on a schedule of 26 hours per week (Butašová et al, 2007, p. 44).

The foreign language is taught compulsory from the 3rd grade of compulsory school attendance, which corresponds to the pupils' age of 11 years (Butašová et al, 2007, p. 40).

Mostly, the young French choose English as their first foreign language, and Spanish as the second one. In elite classrooms, the pupils opt for German as a first foreign language as a first choice, followed by English language as their second one (Butašová et al, 2007, p. 46).

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe – France

Some additional information on language teaching in France is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for France.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for France.

5. Questionnaire

5.1. Statistics on respondents from France for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in France:	**98/1152**
Individuals and small enterprises:	89/98
Language service providers:	8/98
Language service departments:	1/98

6. Estimate of volume and value of language market

Estimated volume (total number of persons employed in translation and interpreting activities, 2008): **9440**
Estimated value (total turnover of translation and interpreting activities, 2008): **729 million €**

Country fact sheet – Germany

1. Country facts

Year of EU entry:	Founding member
Political system:	Federal republic
Capital:	Berlin
Official language(s):	German
Currency:	EUR - Euro
Population (million):	82.50
% of EU-27 total:	16.70%
Employment (million):	38.21
% of EU-27 total:	17.49%
Average gross annual earnings (€), 2006:	42,382
Level above/below EU-27 average:	35.4%

2. Main actors

2.1. List of professional organisations contacted for the study

ADÜ Nord - Associated Translators and Interpreters in Northern Germany eV (Assoziierte Dolmetscher und Übersetzer in Norddeutschland e.V.)
Association for German as a Foreign Language (Fachverband für Deutsch als Fremdsprache)
Association of English & multilingualism (Verband Englisch & Mehrsprachigkeit e.V.)
ATICOM - Association of Professional Freelance Translators and Interpreters, Germany (Fachverband der Berufsübersetzer und Berufsdolmetscher e.V.)
BDÜ - German Federal Association of Interpreters and Translators
BGSD - National association of sign language interpreters (Bundesverband der Gebärdensprachdolmetscher)
DGÜD - German Association for Translation and Interpretation Studies (Deutschen Gesellschaft für Übersetzungs- und Dolmetschwissenschaft)
DSV - German Association of Teachers for Spanish (Deutscher Spanischlehrer-Verband)
FN - Association of the Dutch language (Fachvereinigung Niederländisch)
International Association of Teachers of German (Internationaler Deutschlehrerverband)

Modern Languages Association (Gesamtverband Moderne Fremdsprachen)
QSD - Quality Language Services Germany (Qualitäts-Sprachendienste Deutschlands e.V.)
tekom - German Association for Technical Communication
VdF - Association of Teachers of the French language (Vereinigung der Französischlehrerinnen und –lehrer e.V.)
VDÜ - Federation of German translators of literary and scientific works (Verband deutschsprachiger Übersetzer literarischer und wissenschaftlicher Werke e.V.)
VKD - Association of Conference Interpreters in the BDÜ (Verband der Konferenzdolmetscher im BDÜ e.V.)

2.2 List of universities offering studies in applied linguistics

AKAD. Die Privat-Hochschulen (locations all over Germany)
Fachhochschule Flensburg (Studiengang Internationale Fachkommunikation)
Fachhochschule KÖLN (Institut für Translation und Mehrsprachige Kommunikation (Institute of Translation and Multilingual Communication))
Fachhochschule Würzburg-Schweinfurt (Fakultät Allgemeinwissenschaften)
Hochschule Anhalt, Köthen (Technical translator Training)
Hochschule Magdeburg-Stendal (Bereich Fachkommunikation)
Hochschule Zittau/Görlitz (Fachbereich Sprachen)
Humboldt-Universität zu Berlin (Philosophische Fakultät II)
Johannes-Gutenberg-Universität Mainz (Fachbereich Angewandte Sprach und Kulturwissenschaft in Germersheim)
Private Fachakademie für Fremdsprachenberufe Kempten
Sprachen- und Dolmetscherinstitut München (SDI) (Hochschule für Angewandte Sprachen / Sprachen & Dolmetscher Institut München)
Universität Bonn (Rheinische Friedrich-Wilhelms-Universität) (Institut für Orient- und Asienwissenschaften, Abteilung für orientalische und asiatische Sprachen)
Universität des Saarlandes (Angewandte Sprachwissenschaft sowie Übersetzen und Dolmetschen)
Universität Düsseldorf (Heinrich-Heine-Universität) (Philosophische Fakultät)
Universität Heidelberg (Ruprecht-Karls-Universität), (Institute for General and Applied Linguistics)
Universität Hildesheim (Stiftung Universität Hildesheim) (Institut für Angewandte Sprachwissenschaft)
Universität Leipzig (Institut für Angewandte Linguistik und Translatologie)
Würzburger Dolmetscherschule - (Fachakademie für Fremdsprachenberufe GmbH)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Statistisches Bundesamt Deutschland (StBA)
Acronym:	StBA
Name of office (English):	Federal Statistics Office
Website:	http://www.destatis.de/jetspeed/portal/cms/
National coding system:	unknown
Coding system based on:	NACE 1.1
Code for translation and interpreting:	74.85.1 (Freiberufliche Dolmetscher) 74.85.2 (Übersetzungsbüros)
Contacted?	Yes
Responded?	Yes
Data provided?	Yes
Data exploitable?	Fully

3.2. Other authorities contacted

Name of authority in English	Responded?	Data provided?	Data exploitable
Ministry of Finance	Yes	No	N/A
Germany Trade and Invest	Yes	No (referred us to the national statistics office and to a professional association)	N/A
German Institute for Economic Research	Yes	No	N/A
Centre of Education of the *Land* Baden-Württemberg	Yes	No (e-mail forwarded to someone else)	:
Institute of Teacher Training of the *Land* Brandenburg	No	:	:
Ministry of Cultural Affairs of the *Land* Saxony-Anhalt	No	:	:
Ministry of Cultural Affairs of the *Land* Thuringia	Yes	Yes	No
Ministry of culture of the Land Hamburg	Yes	Yes	No
Ministry of Education and Cultural Affairs of the *Land* Hessen	Yes	No	:
Ministry of Education and Cultural Affairs of the *Land* Lower Saxony	No	:	:
Ministry of Education and Women's Issues of the *Land* Schleswig-Holstein	No	:	:

Ministry of Education, Family, Women's Issues and Culture of the *Land* Saarland	Yes	Yes	No
Ministry of Education, Science and Culture of the *Land* Mecklenburg-Western Pomerania	No	:	:
Ministry of Education, Science, Youth and Culture of the *Land* Rhineland-Palatinate	Yes	Yes	No
Ministry of School and Further Education of the *Land* North Rhine-Westphalia	No	:	:
National Insitute of School of the *Land* Bremen	Yes	Yes	No
Senate Department of Education, Science and Research of the *Land* Berlin	Yes	No (e-mail forwarded to someone else)	:
State Ministry of Class and Cultural Affairs of the *Land* Bavaria	No	:	:
State Ministry of Cultural Affairs of the *Land* Saxony	No	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

Statistisches Bundesamt	2009	Strukturerhebung im Dienstleistungsbereich Referat VII C1 7 74.85.1-.2_(2.1-2.9)_2003-06 (GERMAN)
Statistisches Bundesamt	2009	Strukturerhebung im Dienstleistungsbereich Referat VII C1 74.85.1-.2_(1.1-1.4)_2003-06 (GERMAN)

Data provided by the German federal statistics office.

Code:	**74.85.1 (freelance translators)**		**74.85.2. (translation companies)**		**Total**		
Year: 2006					**Data**	**Estimate**	
	Cat I	**Cat II**	**Cat I**	**Cat II**	**2006**	**2007**	**2008**
Number of enterprises	1 685	33	3 221	280	5 219	5 610	6 031
Number of persons employed	1 919	84	5 918	2 326	10 247	11 016	11842

Of whom employees	231	55	2 737	2 143	5 166	5 553	5 970
Total Turnover (1000 €)	103 916	12 588	194 820	235 047	546 371	587349	631 400
Average turnover per enterprise (1 000 €)	61671	381 455	60 484	839 454	104 689	104 689	104 689
Wages (1000 €)	2 877	691	67 579	61 979	133 126	143 110	153 844
Category 1 (cat I): turnover above 17 500 EUR							
Category 2 (cat II): turnover above 250 000 EUR							

Figure 62 – Source: (Statistisches Bundesamt, 2009b)

The data above includes freelancers. An estimate for the growth of the market in 2007 and 2008 is based on the average annual growth of 7.5% estimated by a Common Sense Advisory report (Beninatto & DePalma, 2007).

The estimated turnover for the translation and interpreting market in Germany of **631 million €** lies slightly below the estimates provided by QSD in the EUATC report (EUATC, 2005). According to those figures, the turnover of the German translation market in 2004 ranged between 500 million € and 700 million €. Considering an annual growth of 7.5% and including interpreters (accounting for 15% of the market), the estimated range of turnover for 2008 reaches between 786 million € and 1.1 billion €.

This could either mean that the German market of translation and interpreting has grown less than expected, or that a portion of the market is not included in the figures provided by the Federal statistics office.

Übersetzerportal	2008	U-Jobs-Statistik 2008, Top 10 Sprachen und Sprachrichtungen

10 most important languages	**10 most important language combinations**
English 35.0% (36.9%*)	German > English 23.1% (25.9%)
French 13.6% (12.5%)	English> German 11.9% (11.0%)
Italian 6.9% (5.6%)	German > French 8.1% (9.5%)
Spanish 6.0% (6.85)	German > Spanish 3.9% (4.5%)
Russian 5.4% (4.3%)	German > Italian 3.7% (3.4%)
Polish 3.5% (2.7%)	French > German 3.5% (3.0%)
Dutch 3.3% (3.1%)	German > Russian 3.3% (2.6%)
Portuguese 3.3% (2.0%)	Italian > German 2.5% (2.2%)
Turkish 2.3% (2.3%)	German > Dutch 2.1% (2.3%)
Swedish 2.0% (2.0%)	German > Polish 2.1% (1.9%)

*the numbers in brackets represent the percentage for 2007. All percentages refer to the total number of projects posted on the Übersetzerportal mailing list. Total projects: 1 533.

EUATC - European Union of Associations of Translation Companies	2009	Practice in parts of Europe on sworn translations, notorisation and apostille

Educational / other requirements: What it takes to be accepted as a sworn/authorised/official translator

In Germany every federal state has its own legislation about sworn translators and interpreters. Translators needs a university degree or equivalent (however, the definition of "equivalent" is not clear) or pass an exam. All other procedures are similar to those in Spain.

BDÜ - German Federal Association of Interpreters and Translators	2008	Honorarspiegel für Übersetzungs- und Dolmescherleistungen in der Bundesrepublik Deutschland für das Jahr 2007 (GERMAN)
BDÜ - German Federal Association of Interpreters and Translators	2008	Zahlen und Fakten - Maerz 2008 (GERMAN)
BDÜ - German Federal Association of Interpreters and Translators	2009	Zahlen und Fakten - Februar 2009 (GERMAN)
Übersetzerportal	2008	U-Jobs-Statistik 2008: Top 10 Sprachen und Sprachrichtungen

Additional information about translation and interpreting can be found in the reports above.

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	1 500-2 000
Association members (lit. trans. only):	1 270
Number of (new) books published per year:	94 000
Percentage of translations:	7.20%
Number of new works of literature per year:	approx. 11 300
Percentage of translations in literature:	21.50%
Average annual income (turnover) of literary translators (€):	24 370
Average annual gross income of literary translators (€):	18 280
Average gross income in the manufacturing and services sectors^ (€):	41 694
Per capita GDP in terms of PPS^ (€):	25 700
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	44%

*: Figures from 2005 or earlier. ^: Source: Eurostat 2005/2006 data

Figure 63 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	239 784
Total EU-27:	1 220 037

Figure 64 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	German Sign Language
Sign language recognised?	2002
Deaf sign language users:	80 000
Number of sign language interpreters currently working:	600
Hourly rate (€):	42.5
Interpreter organisation:	Bundesverband der Gebardensprachdolmetscher innen Deutschlands e.V (BGSD)

Figure 65 – Source: (de Wit, 2008)

Monfort	2004	Sign Language Interpreter - a graduate profession

Additional information on sign language interpreting in Germany can be retrieved from the report(s) above.

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Germany is a federal parliamentary republic of 16 states (*Länder*). The *Länder* are states in their own right and with their own powers. Each of them has their own state constitutions, their own parliaments and governments as well as their own administration and organisation[6]. The *Länder* are responsible for the German education system and the federal government only has a minor role. Because of this structure, it was not possible to retrieve an overall picture about language teaching for the present study. About half of the Länder provided some information. However, the data were inhomogeneous and not comparable.

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
English:	1 823 965

[6] http://www.kinder-jugendhilfe.org/en_kjhg/cgi-bin/showcontent.asp?ThemaID=4800

French:	379 179
Spanish:	218 131
Italian:	30 176
Total:	**2 451 451**

Figure 66 – Source: (Eurostat, 2009a)

Butašová et al	2007	Conception of Teaching Foreign Languages at Primary Schools and Secondary Schools
Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Germany

Some additional information on language teaching in Germany is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Germany.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Germany.

5. Questionnaire

5.1. Statistics on respondents from Germany for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Germany:	**107/1152**
Individuals and small enterprises:	91/107
Language service providers:	11/107
Language service departments:	5/107

6. Estimate of volume and value of language market

Estimated volume (total number of persons employed in translation and interpreting activities, 2006): **approximately 6 000** (including freelancers)
Estimated value (total turnover of translation and interpreting activities, 2006): **631 million €** (including freelancers)

Country fact sheet – Greece

1. Country facts

Year of EU entry:	1981
Political system:	Republic
Capital:	Athens
Official language(s):	Greek
Currency:	EUR - EUR
Population (million):	11.20
% of EU-27 total:	2.27%
Employment (million):	4.51
% of EU-27 total:	2.06%
Average gross annual earnings (€), 2006:	:
Level above/below EU-27 average:	:

2. Main actors

2.1. List of professional organisations contacted for the study

HATC - Hellenic Association of Translation companies
PASMEE - Pan-Hellenic Association of Translational Enterprises
PEKADE - Panhellenic Association of State School Teachers of English
PEM - Panhellenic Association of Translators
QLS - Panhellenic Association of Accredited Quality Language Schools

2.2 List of universities offering studies in applied linguistics

Ionian University CORFU (Department of Foreign Languages, Translation and Interpreting)
National and Kapodistrian University of Athens (Faculty of English Studies, School of Philosophy)
Université Aristote de THESSALONIKI (Faculty of Philosophy)

3. Statistical data

3.1. National Statistics Office

Acronym:	NSSG
Name of office (English):	National Statistical Service Greece
Website:	http://www.statistics.gr/
National coding system:	unknown
Coding system based on:	NACE 2
Code for translation and interpreting:	74.3 (translation and interpretation activities)
Contacted?	Yes
Responded?	Yes
Data provided?	Yes
Data exploitable?	yes

3.2. Other authorities contacted

Name of authority in English	**Responded?**	**Data provided?**	**Data exploitable?**
Ministry of Economy and Finance	No	:	:
Athens Chamber of Commerce and Industry	No	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

Greek National statistical Service	2009	Response from NSO GR

Code: 74.3 (translation and interpretation activities)	
	year unknown
Number of enterprises	1297
Number of employees	283
turnover (million EUR)	22.73

Figure 67 – Source: (Greek National statistical Service, 2009)

Assuming that these figures do not include freelancers, and assuming that the findings of the CNET report are applicable for Greece as well (CNET, 2007), the total turnover for Greece amounts to **37.8 million €**, of which **15.1 million €** belong to the freelance market.

Pasmee	2008	Market Survey Greece 2008 (GREEK)

Additional information about the translation and interpreting sector can be found in the report(s) above

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	~~
Association members (lit. trans. only):	75
Number of (new) books published per year:	9 803
Percentage of translations:	44%
Number of new works of literature per year:	1 907
Percentage of translations in literature:	47%
Average annual income (turnover) of literary translators (€):	11 160
Average annual gross income of literary translators (€):	8 730
Average gross income in the manufacturing and services sectors^ (€):	19914^^
Per capita GDP in terms of PPS^ (€):	19 200
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	44%
*: Figures from 2005 or earlier. ^: Source: Eurostat 2005/2006 data ~~ : No data available ^^ Eurostat data, average estimated on the basis of OECD data	

Figure 68 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	23 268
Total EU-27:	1 220 037

Figure 69 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

No information specifically relating to sign language interpreting could be retrieved for Greece

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	2006
English:	308 306
French:	34 901
German:	7 855
Italian:	343
Total:	351 405

Figure 70 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	2006
Zero:	34 802
One:	315 507
Two:	17 949
Three:	0
Four or more:	0

Figure 71 – Source: (Eurostat, 2009b)

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Greece

Some additional information on language teaching in Greece is available in the report(s) above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Greece.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Greece.

5. Questionnaire

5.1. Statistics on respondents from Greece for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Greece:	**19/1152**
Individuals and small enterprises:	14/19
Language service providers:	3/19
Language service departments:	2/19

6. Estimate of volume and value of language market

Due to the fact that the year of the data provided is unknown, we will only provide the value of the translation and interpreting market in Greece: **23 million € for companies and 15 million € for freelancers, for a total of 38 million €.**

Country fact sheet – Hungary

1. Country facts

Year of EU entry:	2004
Political system:	Republic
Capital:	Budapest
Official language(s):	Hungarian
Currency:	HUF - Forint
Exchange rate as at 19.05.2009 (1 €=...):	284.15
Population (million):	10.10
% of EU-27 total:	2.04%
Employment (million):	3.92
% of EU-27 total:	1.80%
Average gross annual earnings (€), 2006:	7,840
Level above/below EU-27 average:	-75.0%

2. Main actors

2.1. List of professional organisations contacted for the study

Association of Hungarian Translators and Interpreters
HAALLT - Hungarian Association of Applied Linguists and Language Teachers
Hungarian Association of Language Schools
Hungarian Cultural Institutes Worldwide
MFE - Association of Hungarian Translation Companies (Magyarországi Forditóirodák Egyesülete)

2.2 List of universities offering studies in applied linguistics

Budapest Business School (College of International Managemeent and Business Studies)
Corvinus University of Budapest (Faculty of Arts)
Eötvös Loránd Tudományegyetem, Budapest (Departement of Translation and Interpreting)
Kodolányi János Főiskola
Nyugat-Magyarországi Egyetem (Berzsenyi Dániel Főiskola), Bölcsészettudományi Kar
Pécsi Tudományegyetem, University of Pécs (Translatiors training program social sciences and economy)

Péter Pázmány Catholic University (Faculty of Arts)
Szent István Egyetem, Gazdaság- és Társadalomtudományi Kar, (SZIU Faculty of Economics and Social Sciences, Department of Translation and Interpreting in the field of social sciences and economics)
Université des Sciences Techniques et Économiques de Budapest (École de Traducteurs et Interprètes Internationaux)
University of Debrecen (Faculty of Arts)
University of Miskolc (Department for Applied Linguistics)
University of SZEGED (Interdepartmental Translator and Interpreter Training Programme, Faculty of Arts)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Központi Statisztikai Hivatal
Acronym:	KSH / HCSO
Name of office (English):	Hungarian Central Statistical Office
Website:	http://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_main
National coding system:	unknown
Coding system based on:	unknown
Code for translation and interpreting:	Unknown
Contacted?	Yes
Responded?	Yes
Data provided?	No
Data exploitable?	N/A

3.2. Other authorities contacted

Name of authority in English	**Responded?**	**Data provided?**	**Data exploitable?**
Ministry of Finance	Yes	No	:
Investment and trade Development Agency	No	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

Hemera, Elekes	2008	The Eastern European translation market

In the Czech Republic, Slovakia, Hungary, Poland, Romania and Slovenia, growth is perceived in the size of the market, the number of new agencies opening, the intensity of the life of associations and the translator community. The following figure was provided about the number of translation agencies established in Hungary:

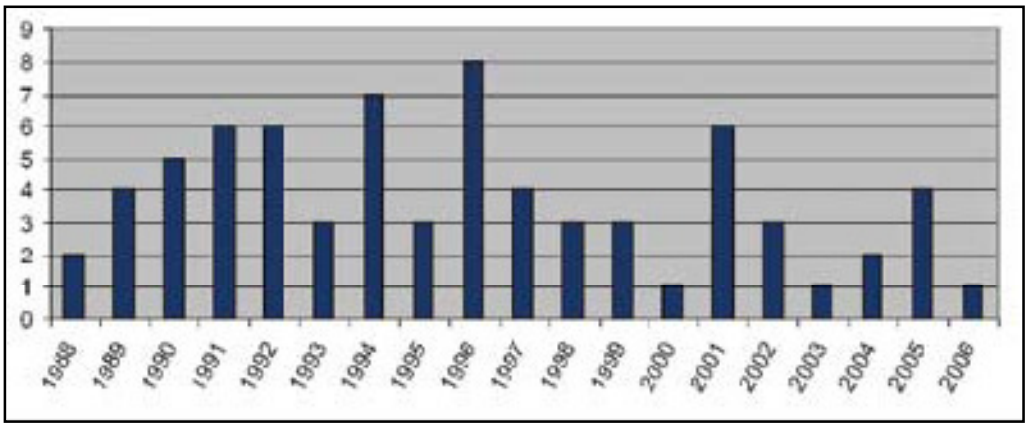


Figure 72 – Number of translation agencies established in Hungary. Source: (Hemera & Elekes, 2008)

Since the tables were not commented in the rest of the report, it was very difficult to interpret the figures. The total number of translation agencies established in Hungary adds up to 69 since 1988 according to the graph above.

The following figure was provided about Hungarian market data:

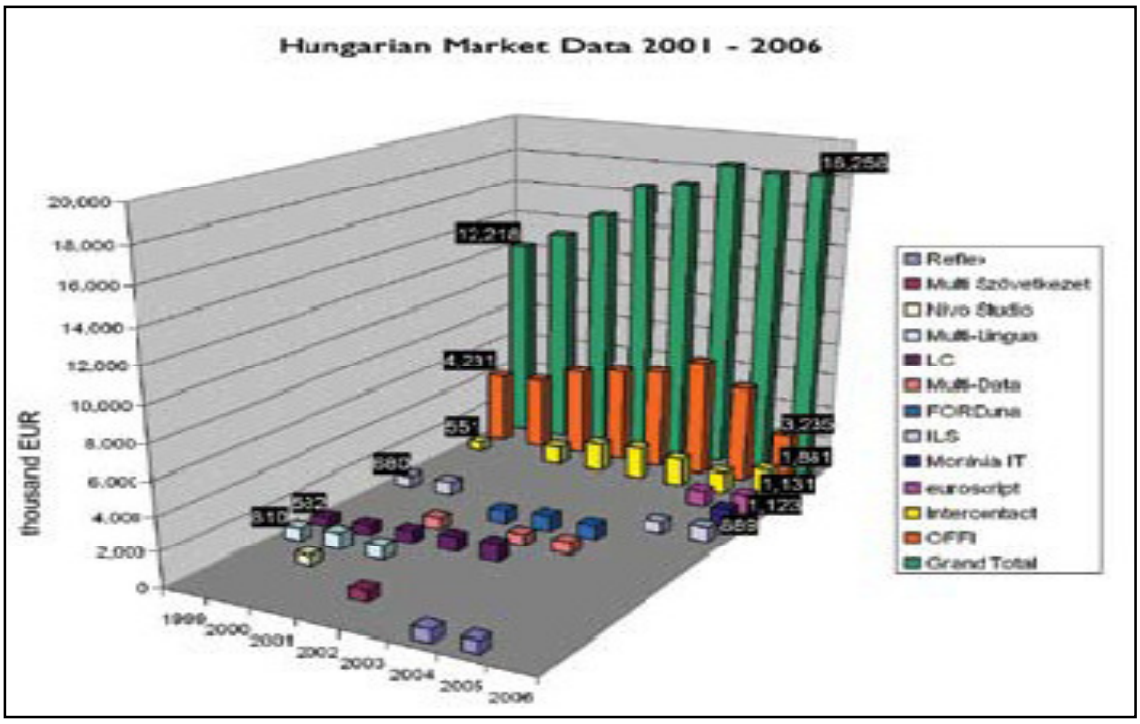


Figure 73 – Hungarian market data 2001 – 2006. Source: (Hemera & Elekes, 2008)

The quality of the image was quite poor and the data were not commented in the rest of the report. Therefore, only a very approximate interpretation of the figures was possible.

Assuming that the green columns of the first chart represent the total turnover, we can assume that between 1999 and 2006 the total turnover for Hungary has increased from approximately **12 million €** to **18 million €**. Provided this trend remained constant until 2008, the market would be worth **19.7 million €** in 2008.

Assuming that this statistic does not account for freelancers, and applying the figures retrieved by CNET for France (CNET, 2007), the market could be worth an additional **13.1 million €**, adding up to a total of **32.8 million €**.

This figure is slightly lower compared to the estimates provided by MFE in the 2005 EUATC report (EUATC, 2005): the turnover in 2004 of the Hungarian translation market was estimated at 28 million €. Considering an annual growth of 7.5% (Beninatto & DePalma, 2007) and including interpreters (accounting for 15% of the market), the estimate for 2008 reaches 44 million €.

We could therefore assume that market growth was slower in Hungary compared to the global growth rate of 7.5%

In any case, the article reported that the language market in Hungary is growing in terms of number of new translation agencies opening and the intensity of the life of associations and the translator community.

Fischer (Budapest Business Journal)	2006	Translation market waits for 'official' liberalization

According to industry analysts, clients of Hungarian translation agencies are growing more and more demanding – a development that is forcing competing agencies to invest in sector-related technology. The more cost-conscious segments of the market, however, remain focused on price, which is forcing some agencies to charge minimum rates.

Meanwhile, the entire sector awaits liberalization of the market for officially certified translations, now the virtual monopoly of the National Translation and Attestation Office Zrt (OFFI). While competition is somewhat stiff, the local translation market is relatively small, and there are plenty of freelancers and smaller agencies thrown into the mix.

Some interviews were conducted with experts of the field and the main points raised are summarised below:

László Reha (president of the Association of Hungarian Translation Agencies and managing director of ILS Kft):

- "Although we registered some 313 translation agencies in 2005, only 20 or so are significant players on the market,"
- "due to the relatively small local market, large international translation agencies are unlikely to acquire Hungarian agencies. Some big ones have already established subsidiaries in Hungary, but I don't think any more large international firms will enter the Hungarian market,"

Miklós Bán (managing director of e-spell Group):

- "no multilingual vendors (MLVs) – i.e. the largest, global translation companies – are prepared to enter the Hungarian market due to its relatively small size".
- The market will move when the OFFI monopoly ends: "Every company with a strategic way of thinking has to be prepared to react on time, taking into consideration that the OFFI's annual turnover of nearly Ft 2 billion [€7.32 million] will be out on the free market," he said.
- "market entry is more difficult than it used to be: Entering the market today requires technology: hardware and software utilities, but also well-trained IT professionals and translators"

Annette Hemera (regional director of Skrivanek Hungary Kft):

- There is healthy competition: "Opening a new translation agency doesn't require a huge capital investment. So there are all kinds of players on the market, and lots of small ones too. A company basically has to define its target group, and being prepared for constant change is one of the most characteristic features of the translation market."

Veronika Mendel (managing director of Intercontact Budapest Kft)

- "Lately, there have been some unrealistically depressed prices from translation agencies interested in public procurement tenders".

GVH - Hungarian Competition Authority	2008	Faster and cheaper attested translations

The GVH (Hungarian Competition Authority) initiated proceedings against the National Office for Translation and Attestation (Országos Fordító és Fordításhitelesítő Iroda Zrt., hereinafter OFFI) in September 2007 to examine whether the Office abused its dominant position when applying its price setting practices. After the initiation of the proceeding, OFFI made certain commitments. The GVH accepted the commitments of OFFI and terminated the proceeding by an order without establishing the infringement.

4.1.2. Literary translation

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	47 337
Total EU-27:	1 220 037

Figure 74 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Hungarian Sign Language
Sign language recognised?	No
Deaf sign language users:	8 000
Number of sign language interpreters currently working:	70
Hourly rate (€):	15.0
Interpreter organisation:	Hungarian Association of Sign Language Interpreters(JOSZ)

Figure 75 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete

		study (IN FRENCH)
Prószéky	2009	HLT in Hungary

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
English:	155,663
German:	79,877
Italian:	26,652
French:	6,624
Spanish:	999
Total:	**269,815**

Figure 76 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	**2003**
Zero:	0
One:	0
Two:	0
Three:	0
Four or more:	0

Figure 77 – Source: (Eurostat, 2009b)

Council of Europe	2003	Language Education Policy Profile - Hungary
Petneki /National Institute for Public Education	nd	Teaching foreign languages

Some additional information on language teaching in Hungary is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Hungary.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Hungary.

5. Questionnaire

5.1. Statistics on respondents from Hungary for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Hungary:	**14/1152**
Individuals and small enterprises:	12/14
Language service providers:	1/14
Language service departments:	1/14

6. Estimate of volume and value of language market

Based on the data collected through secondary research, the value of the market of translation and interpreting can be estimated at **33 million €** in 2008 (including freelancers). No data could be retrieved that allowed us to estimate the number of businesses, persons employed or freelancers active in the country.

Country fact sheet – Ireland

1. Country facts

Year of EU entry:	1973
Political system:	Republic
Capital:	Dublin
Official language(s):	English, Irish
Currency:	EUR - EUR
Population (million):	4.00
% of EU-27 total:	0.81%
Employment (million):	2.11
% of EU-27 total:	0.97%
Average gross annual earnings (€), 2006:	40462*
Level above/below EU-27 average:	29.3%

2. Main actors

2.1. List of professional organisations contacted for the study

ACELS - Advisory Council for English Language Schools
ATS - Association of Teachers of Spanish of Ireland
FAILTE - Irish National Tourism Development Authority
FTA - French Teachers' Association of Ireland
GDI - German Teachers' Association of Ireland
INTO - Irish National Teachers' Organisation
ITE - Linguistics Institute of Ireland
ITIA - Irish Translator's and Interpreter's Association
LCI - Language Centre of Ireland
Marketing English in Ireland (the association of recognized ELT organizations)
Modern Languages in Primary Schools
RIA - Royal Irish Academy-Modern Language, Literary & Cultural Studies
Teaching Council
UCD - Applied Language Centre

2.2 List of universities offering studies in applied linguistics

Dublin City University (Dublin City University)

National University of Ireland GALLWAY

3. Statistical data

3.1. National Statistics Office

Name of office:	Central Statistics Office Ireland
Acronym:	CSO
Website:	http://www.cso.ie/
National coding system:	unknown
Coding system based on:	unknown
Code for translation and interpreting:	unkown
Contacted?	Yes
Responded?	Yes
Data provided?	No (not available)
Data exploitable?	N/A

3.2. Other authorities contacted

Name of authority in English	Responded?	Data provided?	Data exploitable?
Department of Finance, Government of Ireland	No	:	:
Chambers Ireland	No	:	:
Companies Registration Office	Yes	No (referred to the statistics office and to several private market research companies)	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

O'Connell, Walsh	2006	Translation and language planning in Ireland: challenges and opportunities

Some information on Ireland is available in the report(s) above.

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	50-60
Association members (lit. trans. only):	approx.40
Number of (new) books published per year:	~~
Percentage of translations:	~~
Number of new works of literature per year:	~~
Percentage of translations in literature:	~~
Average annual income (turnover) of literary translators (€):	38,300
Average annual gross income of literary translators (€):	28,725
Average gross income in the manufacturing and services sectors^ (€):	40,462
Per capita GDP in terms of PPS^ (€):	32,100
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	71%
*: Figures from 2005 or earlier. ^: Source: Eurostat 2005/2006 data ~~ : No data available	

Figure 78 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	188
Total EU-27:	1 220 037

Figure 79 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Irish Sign Language
Sign language recognised?	No
Deaf sign language users:	5000
Number of sign language interpreters currently working:	40
Hourly rate (€):	:
Interpreter organisation:	Folded in 2007
: No data available	

Figure 80 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
Dutch:	117
French:	82,933
German:	23,318
Spanish:	11,579
Italian:	2,312
Polish:	7
Portuguese:	6

Greek:	1
Swedish:	1
Total:	**120,274**

Figure 81 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	**2006**
Zero:	20,478
One:	103,109
Two:	8,087
Three:	671
Four or more:	56

Figure 82 – Source: (Eurostat, 2009b)

Council of Europe	2008	Language Education Policy Profile - Ireland
FAILTE - Irish National Tourism Development Authority	2006	EFL Final Report
FAILTE - Irish National Tourism Development Authority	2007	English Language schools survey
Slattery M	2000	European Language Learning Material Survey - Ireland National Report

Ireland is the only country in Europe (other than Scotland) where a foreign language is not compulsory at any stage of the school. French is the dominant foreign language, followed by German. Spanish and Italian are far less frequently selected (Council of Europe, 2008, p. 18).

The number of students taking a foreign language as a subject for the examination is decreasing. In 2001, approximately 94% of the students who sat the Junior Certificate examinations chose a foreign language as one of the subjects for assessment. In 2005, for the same Certificate this percentage decreased to less than 88.5%. At Leaving Certificate, the figures were respectively 79% (2001) and 75.3% (2005). Fewer students are taking a foreign language at both examination levels compared to 4 years ago. In one or two schools recently visited by Inspectors, it was noted with concern that up to 50% of students in the first year were not studying any foreign language at all (Council of Europe, 2008, p. 19).

Irish as a foreign language in the EU

In Northern Ireland courses in Irish are attended by about 3000 people. Out of this number, approximately 25% are learning Irish for the first time. About 30% might have learnt Irish before as teenagers in summer schools, and another 30% are quite good at the language and attend to keep up their knowledge of the language. Approximately 5% have not had the opportunity to have any contact with the Irish language before this for various political or cultural reasons (Slattery M, 2000, p. 12).

English as a Foreign Language (EFL)

A survey of 51 ACELS approved schools in Ireland providing EFL courses established that 57 221 students attended EFL courses in the period April 2005 to March 2006. 85% of students were European, of which 79% were represented by the following countries: 21 880 from Italy, 8 611 from Spain, 5 203 from France, 2 870 from Austria and 2 790 from Germany (FAILTE, 2006, p. 3).

The total number of students attending EFL courses grew to 77 766 between November 2006 and October 2007 according to another survey conducted by FAILTE (total number of schools: 66), which is an average of 1 196 Students per school (FAILTE, 2007). As in the previous year, 84% of the students came from Europe and Italy had the highest attendance levels.

Based on the average of 1 196 students per school and the total number of schools approved by ACELS which amounts to 110, the total number of EFL students for 2007 in Ireland is estimated between 130 000 and 140 000 (FAILTE, 2007).

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Ireland
ACELS - Advisory council for English Language Schools	2008	Report with description of activities

Some additional information on language teaching in Ireland is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Ireland.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Ireland.

5. Questionnaire

5.1. Statistics on respondents from Ireland for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Ireland:	**15/1152**
Individuals and small enterprises:	11/15
Language service providers:	3/15
Language service departments:	1/15

6. Estimate of volume and value of language market

Since no data was provided by the authorities and nothing could be retrieved during secondary data collection, it is impossible to estimate the volume and value of the language market for Ireland.

The language industry in Ireland is probably large because of the large number of localisation departments within many European headquarters of US software companies located in Ireland, including HP, Microsoft, Oracle and many more.

Country fact sheet – Italy

1. Country facts

Year of EU entry:	Founding member
Political system:	Republic
Capital:	Rome
Official language(s):	Italian
Currency:	EUR - EUR
Population (million):	57.30
% of EU-27 total:	11.60%
Employment (million):	23.22
% of EU-27 total:	10.63%
Average gross annual earnings (€), 2006:	:
Level above/below EU-27 average:	:
: not available	

2. Main actors

2.1. List of professional organisations contacted for the study

AIDAC - Italian Association of Audiovisual Script Translators and Adaptors (Associazione Italiana Dialoghisti Adattatori Cinetelevisivi)
AISLi - Italian Association of Language Schools
AITI - Italian Translators and Interpreters Association
ANILS - National Association of Teachers of Foreign Languages (Associazione Nazionale Insegnanti Lingue Straniere)
ANIOS - Italian association for sign language interpreters (associazione interpreti di lingua dei segni italiana)
ANITI - National Association of Italian translators and interpreters (Associazione Nazionale Italiana Traduttori e Interpreti)
ANTIMI - National Association of Translators and Interpreters of the Ministry of Interior (Associazione Nazionale dei Traduttori e degli Interpreti del Ministero dell'Interno)
ASSITERM - Italian Association for Terminology (Associazione Italiana per la Terminologia)
ASSOINTERPRETI - National Association of Conference Interpreters Professionals (Associazione

Nazionale Interpreti di Conferenza Professionisti)
FEDERCENTRI - National Federation of Centers of Translation and Interpreting (Federazione Nazionale dei Centri di Traduzione e Interpretariato)
Italian Institute of Culture (Instituto Italiano di Cultura)
LDÜ-UDT - Professional association for translators in South Tyrol (Landesverband der Übersetzer - Unione provinciale traduttori)
MET - Mediterranean Editors and Translators
Translators section of the National Union of Writers (Sezione traduttori del Sindacato Nazionale Scrittori)

2.2 List of universities offering studies in applied linguistics

Libera Università di lingue e comunicazione di Milano
Libero Istituto Universitàrio "San Pio V" di Roma (Facoltà di Interpretariato e Traduzione)
Scuola Superiore Mediatori Linguistici (Scuole Civiche di Milano)
Università degli Studi "Ca' Foscari" di Venezia (Facoltà di lingue e letterature straniere)
Università degli Studi della Tuscia di Viterbo (Facoltà di lingue e letterature straniere moderne)
Università degli Studi di Catania (Facoltà di lingue e letterature straniere (sede di Ragusa))
Università degli Studi di Macerata (Facoltà di lettere e filosofia)
Università degli Studi di Messina (Facoltà di lettere e filosofia)
Università degli Studi di Napoli "L'Orientale" (Facoltà di lingue e letterature straniere)
Università degli Studi di Palermo (Facoltà di lettere e filosofia)
Università degli Studi di Parma (Facoltà di lettere e filosofia)
Università degli Studi di Pavia (Facoltà di lettere e filosofia)
Università degli Studi di Perugia (Facoltà di lettere e filosofia)
Università degli Studi di Roma "La Sapienza" (Facoltà di scienze umanistiche)
Università degli Studi di Roma Tre (Facoltà di lettere e filosofia)
Università degli Studi di Torino (Facoltà di Lingue e Letterature Straniere)
Università degli Studi di Trento (Facoltà di lettere e filosofia)
Università degli Studi di Trieste (Scuola superiore di lingue moderne per interpreti e traduttori (SSLMIT))
Università degli Studi G. D'Annunzio di Chieti (Facoltà di lingue e letterature straniere (sede di Pescara))
Università del Salento (Facoltà di lingue e letterature straniere)
Università della Calabria (Cosenza) (Facoltà di lettere e filosofia)
Università dell'AQUILA (Facoltà di lettere e filosofia)
Università dell'Insubria (Como) (Facoltà di giurisprudenza)
Università di Bologna (Dipartimento di lingue e letterature straniere)
Università di Bologna (Scuola Superiore di Lingue Moderne per Interpreti e Traduttori - (SSLMIT))

Università di Cagliari (Facoltà di lingue e letterature straniere)
Università di Firenze (Facoltà di lettere e filosofia)
Università di Genova (Facoltà di lingue e letterature straniere)
Università di Milano (Facoltà di scienze politiche/ Facoltà di lettere e filosofia)
Università di Padova (Facoltà di lettere e filosofia/Facoltà di scienze politiche)
Università di Pisa (Facoltà di lingue e letterature straniere)
Università di Udine (Facoltà di lingue e letterature straniere)
Università per stranieri di Siena (Facoltà di lingua e cultura italiana)
University of Bari (Facoltà di lingue e letterature straniere)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Istituto nazionale di statistica
Acronym:	ISTAT
Name of office (English):	National Institute of Statistics
Website:	http://www.istat.it/
National coding system:	ATECO 2002
Coding system based on:	NACE 1.1
Code for translation and interpreting:	74.85 2
Contacted?	Yes
Responded?	Yes
Data provided?	Yes
Data exploitable?	yes

3.2. Other authorities contacted

Name of authority in English	Responded?	Data provided?	Data exploitable?
Business register	No	:	:
Chamber of commerce	No	:	:
Tax authority*	No	:	:
: not applicable			
* although the Italian tax authority did not reply to our initial request, valuable information was retrieved through the internet			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

ISTAT - Italian National Institute of Statistics	2005	Conti economici delle imprese (ITALIAN)

Data for economic Activity 7485: Reprography services (reproduction of text and documents).

The national classification ATECO 2002, coming from the international classification NACE REV. 1.1, is more detailed (at 5 digit) so the more appropriate ATECO 2002 code is 74.85.2 (Translations and interpreting). Statistics for this sector need ad hoc extraction and have been requested.

Code: 7485: Reprography services	
Year: 2005	
Functional units (number)	**Gross turnover (1 000 EUR)**
18 462	1 797 473

Figure 83 – Gross turnover (in 1 000 EUR) of functional commercial units and of services. Source: (ISTAT, 2005)

Code: 7485: Reprography services			
Year: 2005			
Employees			**Cost of employees**
Entrepreneurs and adjuvants	**Employees**	**Total**	**Wages and salaries (1 000 EUR)**
24 995	12 514	37 509	214 930

Figure 84 – Expenses (in 1 000 EUR) for employees. Source: (ISTAT, 2005)

The figures provided in the tables above refer to code 7485 which includes - but is not limited to - translation and interpreting activities. If the proportions provided by INSEE (2007) are valid for Italy as well, the number of businesses active within translation and interpreting amounts to **6 187**, whereas the total turnover would be **472 million €**.

Based on the data provided, and assuming a turnover growth of 7.5% (Beninatto & DePalma, 2007), the total turnover for translation and interpreting activities is estimated at **586 million €**.

In the 2005 study by EUATC (2005) it was reported that FEDERCENTRI had estimated the Italian translation and interpretation market at **795 million €** (676 for translation only). With a yearly growth of 7.5%, this figure would reach **1.1 billion €** in 2008. This big difference could

be explained with the fact that data provided by ISTAT does not include freelancers, and by the fact that the market growth was not at 7.5% annually.

Assuming that freelancers account for 40% of the turnover of the translation and interpreting market, the total turnover for 2008 would increase to **976 million €**, which however exceeds the FEDERCENTRI findings considerably. We therefore assume that the total turnover of the translation and interpreting market lies between **781 million €** and **976 million €**.

We contacted FEDERCENTRI with the request of viewing the study cited in the 2005 EUATC report, but unfortunately they were not able to provide it.

ISTAT - Italian National Institute of Statistics	2009	Imprese e addetti ateco 74852 per classi di fatturato

Ad-hoc data extraction provided by ISTAT:

Code: 74852 (translation and interpreting activities)		
Year: 2006		
Turnover class	**Enterprises**	**Employees**
> 20.000	2 869	2 903
20.000 - 50.000	2 188	2 264
50.000 - 100.000	595	780
100.000 - 200.000	192	302
200.000 - 500.000	174	528
500.000 - 1.000.000	52	303
1.000.000 - 2.000.000	23	195
2.000.000 - 4.000.000	7	108
Totale	**6 100**	**7 382**

Figure 85 – Source: (ISTAT, 2009)

According to the table above, there were 6 100 enterprises in Italy active within translation and interpreting (which is confirms our assumptions above: the proportions provided by INSEE are applicable to Italy as well) and a total of 7 382 employees.

Unfortunately it is not possible to retrieve an exact turnover from these figures, as turnover is expressed as ranges. By multiplying the number of enterprises with the minimum and maximum turnovers for each range, the resulting turnover ranges between 191 million € and 478 million € in 2006. Considering an average annual growth of 7.5% (Beninatto & DePalma, 2007), this range increases to between **220 million €** and **552 million €** in 2008.

In the same way as we did in the first set of data provided by ISTAT, we assume that these figures do not include freelancers. Assuming that freelancers represent 40% of the market in

Italy (CNET, 2007), the new turnover range amounts to a minimum of **367 million €** to a maximum of **920 million €**.

We therefore confirm our estimate that the total turnover of the translation and interpreting market in Italy lies between **781 million €** and **976 million €**.

AITI - Italian Translators and Interpreters Association	2008	Study on the Italian translation and interpretation market (ITALIAN)

In 2007, AITI performed a survey among its members. In total, 681 responses were collected.

The purpose of the survey was to shed light onto the market of translation and interpreting in Italy, for which statistics are very vague so far.

According to statistics published on different occasions, there are approximately 20 000 translators and interpreters in Italy. The Italian tax office – on the other hand – provided estimates of just 3 883 individuals regularly involved with this activity and 816 companies (including commercial entities)

Main findings of the survey:

- Fees earned and income generated are very low, independently of years of experience.

Turnover achieved by technical-scientific translators in 2006: Figure 86 shows a clear tendency of data towards right (lower turnover). More than half of respondents state that their income is between 0 and 25 000 €. About 10% of respondents earns over 50 000 € per year and the far end even shows someone earning above 95 000 €.

Turnover achieved by interpreters in 2006: statistics for interpreters follow the trend registered for translators: in most cases, turnover is comprised between 0 and 5 000 € and the vast majority lies below 25 000 € per year.

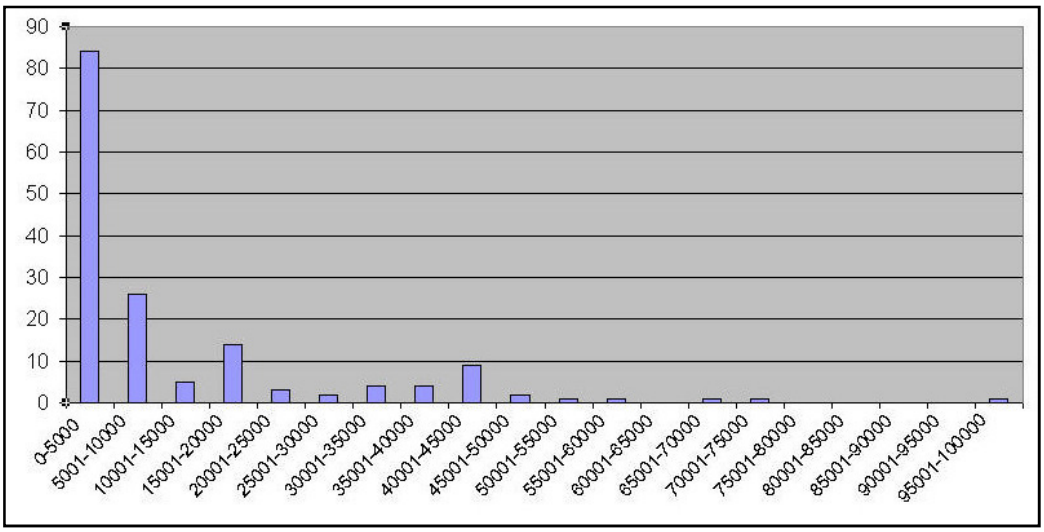


Figure 86 – Source: (AITI, 2008)

Agenzia delle Entrate (Italian Revenue Agency)	2004	Evoluzione Studio di settore TG53U (ITALIAN)

The Italian revenue agency is conducting sector studies to understand structural market changes within certain economic sectors.
This sector study analysed all economic activities belonging to the following ATECOFIN 2004 classification codes:

- 74.85.2 (translation and interpreting)
- 74.87.6 (organisation of trade fairs, exhibitions and conferences).

The number of taxpayers belonging to the above categories during the tax period 2004 amounted to 6 036, of which only **5 223** were included for data analysis.
As a result of data analysis, 12 clusters were identified according to the type of activity, the size and the type of clients.
Clusters relevant for our study are as follows:

Cluster 1: Interpreters	
Size of cluster:	453
Size of business:	Mostly self-employed with no employees.
Type of activity:	Interpreting services account for 92% of their income. Interpreting is mostly simultaneous (47% of income)

Cluster 2: Translation and interpreting agencies	
Size of cluster:	108
Size of business:	Businesses in this cluster mostly employ 5 employees, 54 non-employed translators and 10 non-employed interpreters.
Type of activity:	Translations account for 74% of revenue, Interpretation services (mostly simultaneous) for 11%.

Cluster 5: Translators	
Size of cluster:	1 140
Size of business:	Mostly self-employed with no employees.
Type of activity:	Translation services account for 89% of revenue.

Cluster 6: Translators/Interpreters	
Size of cluster:	835
Size of business:	Mostly self-employed.
Type of activity:	Translation services account for 46% of revenue, interpreting services for 27%. In 40% of the cases, other services are offered among which transcriptions, revisions, consultancy in linguistic issued, generating 37% of revenue.

Cluster 7: Small translation agencies	
Size of cluster:	170
Size of business:	The cluster is composed both by sole proprietors and companies. On average, there are 3 employees and 20 non-employed translators and – in 31% of cases – 3 non-employed interpreters.
Type of activity:	85% of revenue is generated by translation services.

Cluster 8: Translators for translation and interpreting agencies	
Size of cluster:	874
Size of business:	Mostly freelancers with no employees
Type of activity:	Translations account for 90% of their revenue.

Cluster 11: Translators for publishers and film production companies	
Size of cluster:	123
Size of business:	Mostly freelancers with no employees
Type of activity:	95% of revenue is generated by translations.

Cluster 12: Language courses	
Size of cluster:	269
Size of business:	Mostly freelancers employing 1-2 employees.
Type of activity:	Language courses account for 80% of revenue and in 57% of cases, translations account for 24%.

EUATC - European Union of Associations of Translation Companies	2009	Practice in parts of Europe on sworn translations, notorisation and apostille

Educational / other requirements: What it takes to be accepted as a sworn/authorised/official translator

In some Italian courts only sworn translators certified by the court can do sworn translations, in some other courts there are no restrictions. According to a specific article of the law, each clerk in chief of the court can decide the best policy as per sworn translations in his/her own court.

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	~~
Association members (lit. trans. only):	100
Number of (new) books published per year:	59,000
Percentage of translations:	22%
Number of new works of literature per year:	~~
Percentage of translations in literature:	~~
Average annual income (turnover) of literary translators (€):	15,100
Average annual gross income of literary translators (€):	11,325
Average gross income in the manufacturing and services sectors^ (€):	28010 ^^
Per capita GDP in terms of PPS^ (€):	24,100
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	40%
*: Figures from 2005 or earlier. ^: Source: Eurostat 2005/2006 data ^^ Eurostat data, average estimated on the basis of OECD data	

Figure 87 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	53,254
Total EU-27:	1,220,037

Figure 88 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Italian Sign Language
Sign language recognised?	No
Deaf sign language users:	40,000
Number of sign language interpreters currently working:	200 (ANIMU) & 100 (ANIOS)
Hourly rate (€):	Anios=55/ Anium=50
Interpreter organisation:	ANIOS:www.anios.it ANIMU:www.animu.it

Figure 89 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry
Agrosì	2005	Intervista a Mario Paolinelli e Eleonora Di Fortunato, traduttori-adattatori di dialoghi 27-07-2005 (ITALIAN)
AIDAC - Italian Association of Audiovisual Script Translators and Adaptors	2008	Tabella compensi minimi - 080331 (ITALIAN)
AIDAC/Paolinelli	2009	Phone interview (ITALIAN)
ASINC - online magazine on criticism and politics of the art of dubbing	2008	News on subtitling and dubbing
Paolinelli	2000	Dubbing at the gate of the third millennium

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

AITI - Italian Translators and Interpreters Association	2008	Study on the Italian translation and interpretation market (ITALIAN)

In 2007, AITI performed a survey among its members. In total, 681 responses were collected.

Main findings of the survey:

- Main CAT tools used:
    - Trados/SDL (258 respondents),
    - Wordfast (128),
    - Star Transit (67),
    - DejaVu (53)

  Usually, the use of Trados is associated with the use of Wordfast (57), Star Transit (53), DejaVu (27), Passolo (14), Across (10), OmegaT (6), Fusion and MetaTexis (3).

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
English:	2,558,217
French:	763,469
German:	208,239
Spanish:	99,539
Total:	**3,629,464**

Figure 90 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	**2006**
Zero:	84,977
One:	1,711,547
Two:	757,812
Three:	133,025
Four or more:	4,352

Figure 91 – Source: (Eurostat, 2009b)

ASILS – Italian language schools	2008	Rapporto ASILS sull'insegnamento dell'Italiano L2 in Italia

ASILS comprises most Italian language schools operating in Italy. In 2008, a report was compiled about tuition of Italian as a second language in Italy.

According to the presentation of the findings, the total number of teachers employed at ASILS schools amounts to 600.

The total number of students in 2007 was 29 500 (see graph below). By looking at the figures from 2004 until 2007, it can be noticed that while the trend is increasing, the curve is less steep in the most recent year.

The total turnover associated with the tuition of Italian at ASILS schools was estimated at **32**

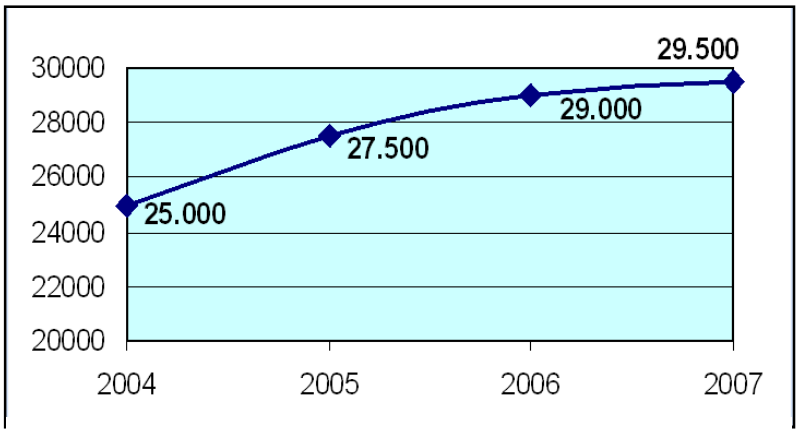


Figure 92 – Number of students at ASILS schools. Source: (ASILS, 2008)

million € for 2007.

Among the main conclusions of the report, the following issues were raised:

- The promotion of Italian as a foreign language should be actively supported on a global basis;

- Private Italian language schools should be accredited by the Italian Ministry of Public Education.

ISTAT - Italian National Institute of Statistics	2006	La lingua italiana, i dialetti e le lingue straniere (ITALIAN)

The report cited above includes some general facts on the Italian language and on foreign language learning in Italy.

Butašová et al	2007	Conception of Teaching Foreign Languages at Primary Schools and Secondary Schools
Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Italy

Some additional information on language teaching in Italy is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Italy.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Italy.

5. Questionnaire

5.2. Statistics of respondents from Italy for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Italy:	**78/1152**
Individuals and small enterprises:	74/78
Language service providers:	2/78
Language service departments:	2/78

6. Estimate of volume and value of language market

The total value of the translation and interpreting market in Italy- including freelancers - lies between **781 million €** and **976 million €.**

However, based on the data provided we cannot estimate the total number of persons active within translation and interpreting.

Country fact sheet – Latvia

1. Country facts

Year of EU entry:	2004
Political system:	Republic
Capital:	Riga
Official language(s):	Latvian
Currency:	LVL - Lats
Exchange rate as at 19.05.2009 (1 €=...):	0.71
Population (million):	2.30
% of EU-27 total:	0.47%
Employment (million):	1.12
% of EU-27 total:	0.51%
Average gross annual earnings (€), 2006:	5,211
Level above/below EU-27 average:	-83.4%

2. Main actors

2.1. List of professional organisations contacted for the study

LALT/LVASA - Latvian Association of Language Teachers
Latvian Association of English Teachers

2.2 List of universities offering studies in applied linguistics

University of Latvia (Faculty of Modern Languages, Department of Contrastive Linguistics, Translation and Interpreting)
Ventspils University College (Faculty of Translation Studies)

3. Statistical data

3.1. National Statistics Office

Name of office (English):	Central Statistical Bureau Latvia
Website:	http://www.csb.gov.lv/
National coding system:	unknown

Coding system based on:	unknown
Code for translation and interpreting:	unknown
Contacted?	Yes
Responded?	Yes
Data provided?	No (payable service)
Data exploitable?	N/A

3.2. Other authorities contacted

Name of authority in English	**Responded?**	**Data provided?**	**Data exploitable?**
Ministry of Finance	No	:	:
Latvian Chamber of Commerce & Industry	No	:	:
Companies register	No	:	:
Lursoft - the Latvian partner of the European	Yes	Yes	Yes
Ministry of Education and Science	Yes	Yes	Yes
Translation and Terminology Centre	No	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

LURSOFT (Latvian partner of the European Business Register)	2007	Number and list of companies by main business activity (Translation and Interpretation)

According to Latvian Law, annual reports are not mandatory to all companies.

Number of companies registered in Latvia which main business activity is “translation and interpretation”: **179**

According to the CNET study, in France for every business within translation and interpretation there are 13 freelancers (CNET, 2007). Assuming that this proportion can be applied to Latvia as well, it could be estimated that there are **2300** freelancers in Latvia.

At LURSOFT, the only data available other than the total number of businesses are full company reports for the year 2007. However, they are available as a payable service.

4.1.2. Literary translation

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	4 050
Total EU-27:	1 220 037

Figure 93 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Latvian Sign Language
Sign language recognised?	2000
Deaf sign language users:	2500
Number of sign language interpreters currently working:	20
Hourly rate (€):	2.0
Interpreter organisation:	LNS Komunikaciju centrs (LAD Communication Center)

Figure 94 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	2006
English:	67,484
German:	24,938
French:	2,949
Spanish:	380
Swedish:	188
Polish:	134
Finnish:	86
Danish:	82
Italian:	28
Estonian:	9
Total:	96,278

Figure 95 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	1998
Zero:	738
One:	11,747
Two:	32,588
Three:	7,173
Four or more:	467

Figure 96 – Source: (Eurostat, 2009b)

Latvian Ministry of Education and Science	2009	Language teaching figures (response from ministry of education and science)

From e-mail: "statistical data about foreign language teachers at vocational schools, higher education institutions, private language schools and courses of continuing education are not available.

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Latvia

Some additional information on language teaching in Latvia is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Latvia.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Latvia.

5. Questionnaire

5.1. Statistics on respondents from Latvia for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Latvia:	7/1152
Individuals and small enterprises:	4/7
Language service providers:	2/7
Language service departments:	1/7

6. Estimate of volume and value of language market

The only estimate that can be provided is the total number of businesses active in translation and interpreting, which amounts to **179**, and the total number of freelancers, which is estimated at **2 300**.

Country fact sheet – Lithuania

1. Country facts

Year of EU entry:	2004
Political system:	Republic
Capital:	Vilnius
Official language(s):	Lithuanian
Currency:	LTL - Litas
Exchange rate as at 19.05.2009 (1 €=...):	3.45
Population (million):	3.40
% of EU-27 total:	0.69%
Employment (million):	1.53
% of EU-27 total:	0.70%
Average gross annual earnings (€), 2006:	:
Level above/below EU-27 average:	:
: not available	

2. Main actors

2.1. List of professional organisations contacted for the study

Lithuanian Translators Guild
LKPA - Language Teachers' Association of Lithuania

2.2 List of universities offering studies in applied linguistics

University of Technology - KAUNAS (Faculty of Humanities)
University of VILNIUS (Department of translation and interpreting studies)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Statistikos Departamentes
Name of office (English):	Department of Statistics
Website:	http://www.stat.gov.lt/lt/

National coding system:	unknown
Coding system based on:	unknown
Code for translation and interpreting:	7430 (translation and interpretation)
Contacted?	Yes
Responded?	Yes
Data provided?	Yes
Data exploitable?	yes

3.2. Other authorities contacted

Name of authority in English	**Responded?**	**Data provided?**	**Data exploitable?**
Ministry of Finance	No	:	:
State Enterprise Centre of Registers	No	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

Statistics Lithuania	2009	Data provided (2005-2006)

The following data were provided by the national statistic office of Lithuania

Code: 7430 (translation and interpretation)	**data**		**estimate**
	2005	**2006**	**2008**
Number of enterprises	1017	84	
Number of persons employed	1182	261	
Number of employees	197	218	
Income, LTL mill.	42.84	17.28	18.57
Income (million €)			5.38
Gross investment in tangible assets, LTL mill.	1.65	1.32	

Figure 97 – Source: (Statistics Lithuania, 2009)

Based on the figures provided, we assume that data for 2005 was retrieved according to the NACE Rev. 1 coding system and data for 2006 according to NACE Rev. 2. We have therefore disregarded data for 2005 and only taken into consideration data for 2006.

Assuming that the Lithuanian market follows the globally established growth rate of 7.5% for the language market (Beninatto & DePalma, 2007), we estimate that the total turnover for translation and interpreting businesses reached **5.4 million €** in 2008.

Most probably, this figure does not include freelancers. If freelancers account for 40% of the total turnover of the translation and interpreting market (CNET, 2007), the total turnover increases to **9 million €**, of which **3.6 million €** are attributable to freelancers.

Despite the fact that there were 84 enterprises active in translation and interpreting in 2006, no estimates can be retrieved for 2008. If the proportion of freelancers for every company retrieved by CNET can be applied to Lithuania as well (CNET, 2007), there are **1 092** freelancers in Lithuania in 2006.

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	approx.200
Association members (lit. trans. only):	100
Number of (new) books published per year:	4,548
Percentage of translations:	33%
Number of new works of literature per year:	1,545
Percentage of translations in literature:	51%
Average annual income (turnover) of literary translators (€):	7,340
Average annual gross income of literary translators (€):	7340
Average gross income in the manufacturing and services sectors^ (€):	8972^^
Per capita GDP in terms of PPS^ (€):	12,200
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	**82%**

*: Figures from 2005 or earlier.

^: Source: Eurostat 2005/2006 data

^^ Eurostat data, average estimated on the basis of OECD data

in bold: figures not very significant due to the lower average income of the manufacturing and services sector in countries that are still lagging far behind the rest of the EU in terms of economic development

Figure 98 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	9,193
Total EU-27:	1,220,037

Figure 99 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
English:	86,004
German:	28,285
French:	5,535
Spanish:	245
Italian:	182
Swedish:	33
Polish:	6
Danish:	3
Total:	**120,293**

Figure 100 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	**2006**
Zero:	8,230
One:	56,074
Two:	48,615
Three:	3,575
Four or more:	0

Figure 101 – Source: (Eurostat, 2009b)

Council of Europe	2006	Language Education Policy Profile - Lithuania

With the entry of Lithuania into the European Union, the social demand for foreign languages - especially English - has grown.

In the Lithuanian schooling system, the first foreign language can be taught from the second grade on, but becomes compulsory at the 4th grade level. However, taking a second foreign language is compulsory from grades 6 to 10 (Council of Europe, 2006, p. 2f). At the secondary

school level the learning of a third foreign language is optional. The number of hours allotted to a foreign language can vary from 2 to 4 hours per week (Council of Europe, 2006, p. 24).

English is the most dominant first language, followed by Russian (Council of Europe, 2006, p. 3). The high increase in the demand for English has affected other languages, especially romance once. Polish is not taught outside the national minority schools and languages from the other Baltic States have no place in the school system (Council of Europe, 2006, p. 3).

General basic and secondary education

English is the first choice as a first foreign language in general basic schools and in gymnasia and has increased from 78% to 83% between 2001 and 2003. German, however, decreased from 18.5% to 14.1% and French even more, namely from 3.9% to 2.7%.

As regards the second compulsory foreign language, Russian is the first choice, followed by German.

In general, it can be said that the languages involved in foreign language tuition are exclusively always the same: English, German, French, Russian. Other languages, whether Romance (Spanish, Italian) or Scandinavian (Danish, Swedish), geographically close (Polish, Latvian) or distant (Chinese, Japanese) are nearly non-existent as third or even second foreign languages. According to the council of Europe, this limited offering is a matter of concern for the future (Council of Europe, 2006, p. 24).

Vocational schools

In vocational schools, the study of at least one foreign language is compulsory up to grade 10. Figures confirm that English is the most popular choice (in 50% of cases), followed by Russian (just above 25%). The charts provided by the Country Report register fluctuations from year to year, but in all cases Russian places after English and before German (20%) in the respective percentages, and French lags behind. Over 80% of the students take only one language and this percentage tends to rise. In some rural areas there is a lack of teachers of English. (Council of Europe, 2006, p. 24f).

Colleges and universities

The situation is slightly different at the level of colleges and universities. In both cases the number and proportion of students taking one or two foreign languages is very high, which highlights the sustained interest and motivation. English clearly remains in first position, followed by German (as opposed to vocational schools, were Russian is the preferred second choice). At colleges and universities, Russian is at the same level with French (Council of Europe, 2006, p. 25).

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Lithuania

Some additional information on language teaching in Lithuania is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Lithuania.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Lithuania.

5. Questionnaire

5.1. Statistics on respondents from Lithuania for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Lithuania:	**6/1152**
Individuals and small enterprises:	4/6
Language service providers:	2/6
Language service departments:	0/6

6. Estimate of volume and value of language market

Based on the data provided by the national statistics office, we can say that in 2006 there were **261** persons employed by businesses operating within translation and interpreting and approximately **1 100** freelancers.

The estimated volume of the translation and interpreting market in 2008 amounts to **9 million €**, of which **3.6 million €** are generated by freelancers.

Country fact sheet – Luxembourg

1. Country facts

Year of EU entry:	Founding member
Political system:	Constitutional monarchy
Capital:	Luxembourg
Official language(s):	French , German
Currency:	EUR - Euro
Population (million):	0.50
% of EU-27 total:	0.10%
Employment (million):	0.20
% of EU-27 total:	0.09%
Average gross annual earnings (€), 2006:	43,621
Level above/below EU-27 average:	39.4%

2. Main actors

2.1. List of professional organisations contacted for the study

No professional organisations were contacted in Luxembourg

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Service central de la statistique et des études économiques
Acronym:	STATEC
Name of office (English):	Central Service for Statistics and Economic Studies
Website:	http://www.statec.public.lu/fr/index.html
National coding system:	unknown
Coding system based on:	unknown
Code for translation and interpreting:	74.30 (Translation and interpreting)
Contacted?	Yes
Responded?	Yes
Data provided?	Yes, and referred us to the Ministry of Education
Data exploitable?	Partly

3.2. Other authorities contacted

Name of authority in English	Responded?	Data provided?	Data exploitable?
Ministry of Finance	No	:	:
Chamber of Commerce	No	:	:
Trade and Companies Register	Yes	No (referred us to statistics office and chamber of commerce)	:
Ministry of Education - Statistical Unit	:	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

STATEC	2009	Number of registered businesses for 2007

Number of registered businesses for 2007, NACE code 74.30 (translation and interpretation): **95**.

Data about number of employees, overall turnover and wages are not available.

Assuming that the findings of the CNET study (CNET, 2007) are applicable to Luxembourg as well, there are 13 freelancers for every company whose main activity is translation and interpretation. We could therefore assume that in 2007 there were **1 218** freelancers in Luxembourg.

4.1.2. Literary translation

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	43
Total EU-27:	1,220,037

Figure 102 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
French:	14,033
German:	12,961
English:	11,825
Spanish:	430
Italian:	237
Dutch:	22
Total:	**39,508**

Figure 103 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	**2006**
Zero:	1,351
One:	2,990
Two:	2,750
Three:	9,422
Four or more:	688

Figure 104 – Source: (Eurostat, 2009b)

Butašová et al	2007	Conception of Teaching Foreign Languages at Primary Schools and Secondary Schools
Council of Europe	2006	Language Education Policy Profile - Luxembourg
Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Luxembourg

Some additional information on language teaching in Luxembourg is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Luxembourg.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Luxembourg.

5. Questionnaire

5.1. Statistics on respondents from Luxembourg for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Luxembourg:	**5/1152**
Individuals and small enterprises:	4/5
Language service providers:	1/5
Language service departments:	0/5

6. Estimate of volume and value of language market

Based on the data provided by STATEC Luxembourg, we know that there were 95 companies registered with translation and interpretation activities. The estimate of the total number of freelancers in 2007 amounts to **1 280**.

No estimates can be put forward regarding the value of the language market in Luxembourg. However Euroscript - the 10th biggest language service provider worldwide - is headquartered in Luxembourg with a total turnover of 87.8 million €. We can therefore assume that the market is worth at least **87.8 million €** in Luxembourg (Beninatto & Kelly, 2009).

Country fact sheet – Malta

1. Country facts

Year of EU entry:	2004
Political system:	Republic
Capital:	Valletta
Official language(s):	Maltese, English
Currency:	EUR - Euro
Population (million):	0.40
% of EU-27 total:	0.08%
Employment (million):	0.16
% of EU-27 total:	0.07%
Average gross annual earnings (€), 2006:	11,669
Level above/below EU-27 average:	-62.7%

2. Main actors

2.1. List of professional organisations contacted for the study

Maltese Institute (Ghaqda tal-Kittieba Maltin)

2.2 List of universities offering studies in applied linguistics

University of Malta - MSIDA (University of Malta, Msida)

3. Statistical data

3.1. National Statistics Office

Acronym:	NSO
Name of office (English):	National Statistics Office Malta
Website:	http://www.nso.gov.mt/site/page.aspx
National coding system:	unknown
Coding system based on:	unknown
Code for translation and interpreting:	unknown
Contacted?	Yes, several times
Responded?	Yes
Data provided?	No

Data exploitable?	:

3.2. Other authorities contacted

Name of authority in English	Responded?	Data provided?	Data exploitable?
Ministry of Finance of the Government of Malta	No	:	:
Registry of Companies	No	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

Mallia	nd	Maltese translation in transition

Ever since Malta joined the European Union and the Maltese language was formally recognized as one of the official EU languages as from 2004, there was a boom in the Maltese translation market. We saw the cropping up of local translation agencies and many international translation agencies, mostly European, are demanding more Maltese translators.

The University of Malta felt this change in the Maltese Language and took up the challenge. By the end of the year, the University of Malta is going to launch a brand new dictionary on the local market in assistance to Maltese translators and the general public.

4.1.2. Literary translation

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	84
Total EU-27:	1 220 037

Figure 105 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Maltese Sign Language
Sign language recognised?	No
Deaf sign language users:	120
Number of sign language interpreters currently working:	3
Hourly rate (€):	14.3
Interpreter organisation:	ASLM

Figure 106 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2005**
English:	3,882
Italian:	1,266
French:	409
German:	102
Spanish:	89
Total:	**5,748**

Figure 107 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	**2005**
Zero:	5,403
One:	4,041
Two:	782
Three:	49
Four or more:	0

Figure 108 – Source: (Eurostat, 2009b)

Eurydice P9 EACEA	2008	Key Data on Teaching Languages at School in Europe

In Malta all schools offer bilingual education in English and Maltese from primary level onwards (Eurydice, 2006, p. 25). Schools have to offer seven languages at lower secondary level and pupils can choose only one, whereas at upper secondary level, schools have to offer six out of which pupils may choose three (Eurydice P9 EACEA, 2008, p. 31).

In a large group of countries that includes all the Nordic countries and the three Baltic countries, as well as Greece, France, Italy, Luxembourg, Malta, Portugal and Romania, at least 50 % of pupils learn two or more foreign languages. And in Estonia, Luxembourg, Malta, the

Netherlands and Finland, the proportion of pupils who learn three or even more languages is higher than 15 % (Eurydice P9 EACEA, 2008, p. 59)

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Malta

Some additional information on language teaching in Malta is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Malta.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Malta.

5. Questionnaire

5.1. Statistics on respondents from Malta for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Malta:	**3/1152**
Individuals and small enterprises:	3/3
Language service providers:	0/3
Language service departments:	0/3

6. Estimate of volume and value of language market

Since no data could be retrieved from authorities or from secondary data sources, it is not possible to estimate the volume and value of the language market in Malta.

Country fact sheet – Netherlands

1. Country facts

Year of EU entry:	Founding member
Political system:	Constitutional monarchy
Capital:	Amsterdam
Official language(s):	Dutch
Currency:	EUR - Euro
Population (million):	16.40
% of EU-27 total:	3.32%
Employment (million):	8.46
% of EU-27 total:	3.87%
Average gross annual earnings (€), 2006:	38 700*
Level above/below EU-27 average:	23.6%

2. Main actors

2.1. List of professional organisations contacted for the study

ATA - Association of Translation Agencies
Foundation Translator Forum (Stichting Vertalersforum)
Multilingual Association of the Netherlands
NBTG - Dutch Association of Sign Language Interpreters (Nederlandse Beroepsvereniging Tolken Gebarentaal)
NGTV - Netherlands Society of Interpreters and Translators (Nederlands Genootschap van Tolken en Vertalers)
SIGV - Court Interpreters and Legal Translators
Union of Media Translators
VLLT - Dutch Association of Teachers of modern languages (Vereniging van Leraren in Levende Talen)
VZV - Freelance Translators Association (Vereniging Zelfstandige Vertalers)

2.2 List of universities offering studies in applied linguistics

Hogeschool West-Nederland (Opleiding Vertaler / Tolk)
ITV Hogeschool voor Tolken en Vertalen (ITV Hogeschool voor Tolken en Vertalen)
LOI

Rijksuniversiteit Groningen (Rijksuniversiteit Groningen)
UTRECHT University (Department of Foreign Languages)
VertalersVakschool (VertalersVakschool)
Vertol (Vertol)
Vrije Universiteit Amsterdam (Vrije Universiteit Amsterdam)
Zuyd University - MAASTRICHT (Department of Translation and Interpreting, Maastricht School of International Communication)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Centraal Bureau voor de Statistiek
Acronym:	CBS
Name of office (English):	Central Bureau of Statistics/Statistics Netherlands
Website:	http://www.cbs.nl/nl-NL/menu/home/default.htm
National coding system:	unknown
Coding system based on:	NACE 1.1
Code for translation and interpreting:	7485 (secretarial and translation activities)
Contacted?	Yes
Responded?	Yes
Data provided?	Yes (helped with data extraction from the website)
Data exploitable?	yes

3.2. Other authorities contacted

Name of authority in English	Responded?	Data provided?	Data exploitable?
Ministry of Finance	yes	No (referred to Statistics Netherlands)	:
Trade register	yes	No	:
Chamber of Commerce	yes	Yes (referred to Statistics Netherlands)	Partly
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

Statistics Netherlands	2008	Data on sector "secretarial and translation activities" - 2007 and 2008

Business, economic activity, size and legal form			
Code 7485 - secretarial and translation activities			
	Actual data		**estimate**
	2006	**2007**	**2008**
Total number of companies	4680	4790	4900
1 employee	4005	4155	4305
More than 1 employee (between "2" and "100 and more")	675	635	595

Figure 109 – Source: (Statistics Netherlands, 2008)

The table clearly shows that almost 90% of the companies have one employee only. This leads us to suppose that the statistic includes freelancers.

Based on the data provided, no estimates can be put forward concerning the total turnover.

In 2005, ATA (EIM) estimated the Dutch translation market at 115 million € (EUATC, 2005). Considering an annual growth of 7.5% and adding interpreters (which account for 15% of the market) to this figure, the estimated turnover for 2008 is **181 million €**. At the moment, this is the only estimate that can be provided for the turnover of the Dutch translation and interpreting market.

Chamber of Commerce of the Netherlands	2008	e-mail response

In the Netherlands, as at 25th March 2009 there are about 4150 companies that have one or more of the following activities: translation/interpretation/correction of texts. More information can be obtained through a charged service.

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	500-600
Association members (lit. trans. only):	350
Number of (new) books published per year:	approx.12, 250
Percentage of translations:	36%
Number of new works of literature per year:	2,395
Percentage of translations in literature:	67%
Average annual income (turnover) of literary translators (€):	31,250
Average annual gross income of literary translators (€):	23,435
Average gross income in the manufacturing and services sectors^ (€):	38,700
Per capita GDP in terms of PPS^ (€):	28,900
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	61%
*: Figures from 2005 or earlier. ^: Source: Eurostat 2005/2006 data	

Figure 110 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	80,305
Total EU-27:	1,220,037

Figure 111 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Dutch Sign Language
Sign language recognised?	No

Deaf sign language users:	15,000
Number of sign language interpreters currently working:	207
Hourly rate (€):	42.7
Interpreter organisation:	Nederlandse Beroepsvereniging Tolken Gebarentaal (NBTG)

Figure 112 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

Thelen, van de Staaij, Klarenbeek	nd	Localisation in The Netherlands: Training and Career Opportunities

<u>The Localisation Industry</u>

The rapid growth of the localisation industry in the Netherlands is characterised by three phases:

1) First boost: 1980 with the first personal computer, for which various types of content needed translation;

2) Second boost: when the first translation memories appeared, making translation much cheaper, faster and more consistent;

3) Third boost: the emergence of the Internet which opened up the international market for everyone, creating a considerable growth on the translation demand side.

Various factors have since contributed further to this growth:

- <u>IT and multimedia side</u>: the upcoming Microsoft Office 2007 suite and Microsoft Windows Vista operating system and the rise in sales of home networking products, gaming products and domestic appliances

- automotive/mechanical engineering side: new EU environmental directives which led to the development of new engines and vehicles, and more localisation work as a consequence. Another factor is that companies realise more and more that they will lose out on sales if they do not continue or start localising their products

- the expansion of the EU and an increase in European directive, which lead to an increased demand for localisation.

The report states that within some agencies in the Netherlands, Dutch was added to the so-called FIGS list (French, Italian, German, Spanish). This clearly indicates that the demand for localisation into Dutch is and will keep growing. However, there is a great shortage of translators in the Netherlands – in particular in the localisation industry.

The Market Players

SDL and Lionbridge are the two main localisation players in The Netherlands.

The Future

The prospects for localisation look promising in the Netherlands: more and more training institutions are including localisation as a subject in their curricula. The Department of Translation and Interpreting of the Maastricht School of International Communication goes even further since the its curriculum is being adapted to allow industry representatives to take part in the training of prospective localisers.

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2003**
English:	183,633
German:	157,311
French:	128,453
Total:	**469,397**

Figure 113 – Source: (Eurostat, 2009a)

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - The Netherlands

Some additional information on language teaching in the Netherlands is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for the Netherlands.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for the Netherlands.

5. Questionnaire

5.1. Statistics on respondents from the Netherlands for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Netherlands:	**51/1152**
Individuals and small enterprises:	46/51
Language service providers:	2/51
Language service departments:	3/51

6. Estimate of volume and value of language market

Based on the data provided by Statistics Netherland, we estimate that there are **4 900** companies currently active within translation and interpreting in the Netherlands. This figure includes sole proprietors.

Based on data provided during secondary research, the estimated total turnover for translation and interpreting activities reaches **181 million €**

Country fact sheet – Poland

1. Country facts

Year of EU entry:	2004
Political system:	Republic
Capital:	Warsaw
Official language(s):	Polish
Currency:	PLN - Zloty
Exchange rate as at 19.05.2009 (1 €=...):	4.47
Population (million):	38.10
% of EU-27 total:	7.71%
Employment (million):	15.24
% of EU-27 total:	6.98%
Average gross annual earnings (€), 2005:	6 269.9
Level above/below EU-27 average:	-80.0%

2. Main actors

2.1. List of professional organisations contacted for the study

PASE - Polish Association for Quality in the Teaching of Foreign Languages (Polish Association for Standards in Language Education)
PSBT - Association of Polish Translators and Interpreters (Polskie Stowarzyszenie Biur Tlumaczen)
PTN - Modern Language Association of Poland (Polskie Towarzystwo Neofilologiczne, Polan)
STP - Association of Polish (Stowarzyszenie Tlumaczy Polskich)
TEPIS - Polish Society of Sworn and Specialised Translators (Towarzystwo Tlumaczy Prawniczych, Ekonomicznych i Sadowych)

2.2 List of universities offering studies in applied linguistics

Jagiellonian University of KRAKOW (Postgraduate Study in Translation, UNESCO Chair for Translation Studies and Intercultural Communication)
Maria Curie-Skłodowska University (UMCS), Lublin (Department of Applied Linguistics, School of German)
Szkoła Tłumaczy i Języków Obcych - POZNAN (School of Translation, Interpreting and Languages)
Université Adam Mickiewicz - POZNAN (Centre for Translator Training, School of English,)
University of Łódź (Postgraduate Programme in Translation)

University of Silesia, Katowice/Sosnowiec (Postgraduate Translator Training Programme, Institute of English,)
Warsaw University (Institute of Applied Linguistics, Postgraduate Interdisciplinary Translator Training Programme, Warsaw University (UW), Warsaw)
Wrocław University (Postgraduate Study in Translation, English Department)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Polska Statystyka Publiczna
Name of office (English):	Poland Public Statistics
Website:	http://www.stat.gov.pl/cps/rde/xchg/gus
National coding system:	PKD
Coding system based on:	NACE 1.1
Code for translation and interpreting:	unknown
Contacted?	Yes
Responded?	Yes
Data provided?	No (no data available)
Data exploitable?	N/A

3.2. Other authorities contacted

Name of authority in English	**Responded?**	**Data provided?**	**Data exploitable?**
Ministry of Finance of the Republic of Poland	No	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

Hemera, Elekes	2008	The Eastern European translation market

This report about the Eastern European translation market presents some general facts about the Czech Republic, Hungary, Poland, Romania, Slovakia and Slovenia. The following figure was provided about Polish market data.

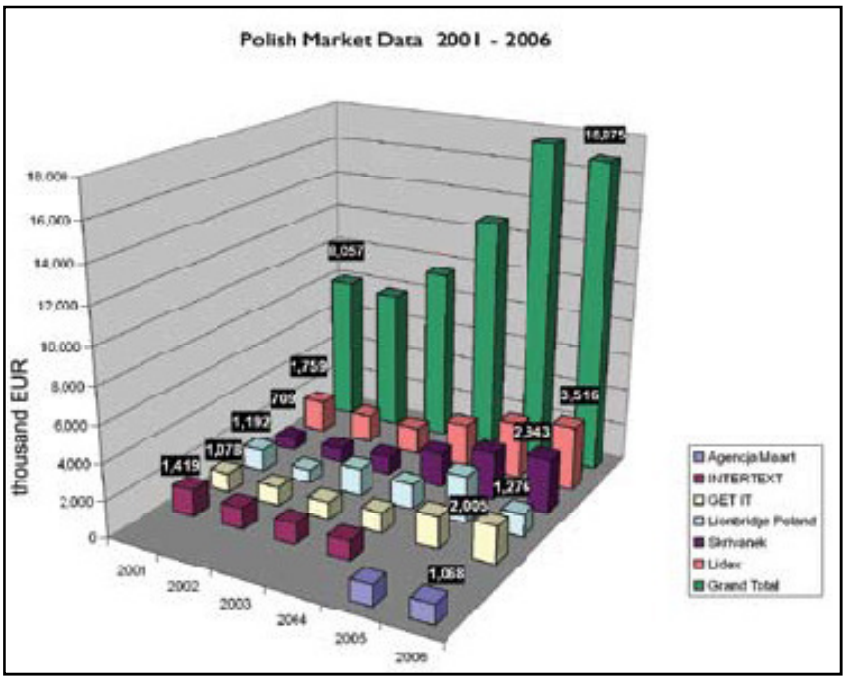


Figure 114 – Source: (Hemera & Elekes, 2008)

The quality of the image was quite poor and the data were not commented in the rest of the report. Therefore, only a very approximate interpretation of the figures was possible.

Assuming that the green columns of the chart represent the total turnover, we can assume that between 2001 and 2006 the total turnover for the Czech Republic has increased from approximately **8 million €** to **16 million €**. Provided this trend remained constant until 2008, the market would be worth **19.2 million €** in 2008.

Assuming that this statistic does not account for freelancers, and applying the figures retrieved by CNET for France (CNET, 2007), the market could be worth an additional **12.8 million €**, adding up to a total of **32 million €**.

In any case, the article reported that the language market in Poland is growing in terms of number of new translation agencies opening and the intensity of the life of associations and the translator community.

EUATC - European Union of Associations of Translation Companies	2009	Practice in parts of Europe on sworn translations, notorisation and apostille

<u>Educational / other requirements: What it takes to be accepted as a sworn/authorised/official translator</u>

The regulations concerning requirements, licensing and responsibilities of sworn translators have been defined in the Act of 25 November 2004 on the Profession of Sworn Translator (and Interpreter). A state exam was introduced as an extra requirement (apart from a relevant degree and documented experience) around the year 2000.

The Rights/ duties of a sworn translator

A person who has passed the examination obtains a licence to practise the profession of sworn translator. Sworn translators are licensed to:

1) prepare and certify translations from a foreign language into the Polish language, from the Polish language into the foreign language, as well as to verify and certify such translations prepared by other persons;

2) prepare certified copies of documents in a foreign language, verify and certify copies of documents prepared in the given language by other persons;

3) interpret.

4.1.2. Literary translation

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	65 194
Total EU-27:	1 220 037

Figure 115 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Polish Sign Language
Sign language recognised?	No
Deaf sign language users:	40,000
Number of sign language interpreters currently working:	200
Hourly rate (€):	:
Interpreter organisation:	No

: No data available	

Figure 116 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)
Przepiórkowski	2009	Polish Language Technology Landscape

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
English:	1,616,050
German:	1,240,083
French:	157,071
Spanish:	11,211
Italian:	11,012
Total:	**3,035,427**

Figure 117 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	**2003**
Zero:	0
One:	0
Two:	0
Three:	0
Four or more:	0

Figure 118 – Source: (Eurostat, 2009b)

Council of Europe	2007	Language Education Policy Profile - Poland

The situation with respect to foreign language teaching is under development. Among other things the planned changes concern:

- development of a core curriculum for foreign language teaching
- introduction of compulsory foreign language teaching into integrated teaching

From 1st September 2006 a pilot programme of English language teaching in grade I of primary school was introduced. This programme includes the provision of 2 lessons of English per week. 65% of Polish schools have participated in this pilot programme in the school year 2006/2007.

The programme is planned to continue for grades I and II of primary school in the school year 2007/2008. Furthermore, the planned changes include issues of plurilingualism: the provisions of the draft of the regulation stipulate that schools should encourage and prepare their students to use foreign languages (Council of Europe, 2007, p. 24).

This program represents major changes, as is evident from a summary of the situation hitherto: one foreign language was compulsory from grade IV at primary school. In addition, some of the schools offered a non-compulsory foreign language in the first stage. English was the dominant foreign language followed by German and Russian in primary and lower secondary schools, with Russian more popular in rural areas. In vocational schools German was a more popular choice than English and in upper secondary schools two foreign languages were compulsory. Thereby, German was the most popular choice as a second foreign language (Council of Europe, 2007, p. 24f).

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Poland

Some additional information on language teaching in Poland is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Poland.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Poland.

5. Questionnaire

5.1. Statistics on respondents from Poland for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Poland:	**27/1152**
Individuals and small enterprises:	14/27
Language service providers:	13/27
Language service departments:	0/27

6. Estimate of volume and value of language market

Based on the data provided by secondary data collection, the translation and interpreting market has a total turnover of **32 million €**, of which **13 million €** belong to the freelance sector.

Country fact sheet – Portugal

1. Country facts

Year of EU entry:	1986
Political system:	Republic
Capital:	Lisbon
Official language(s):	Portuguese
Currency:	EUR - Euro
Population (million):	10.40
% of EU-27 total:	2.11%
Employment (million):	5.17
% of EU-27 total:	2.37%
Average gross annual earnings (€), 2006:	15,930
Level above/below EU-27 average:	-49.1%

2. Main actors

2.1. List of professional organisations contacted for the study

APET - Portuguese Association of Translation Companies (Associação Portuguesa de Empresas de Tradução)
APP - Association of Teachers of Portuguese (Associaçao de Professores de Português)
APT - Portuguese Association of Translators
ATeLP - Association of translations in the Portuguese Language (Associação de Tradução em Língua Portuguesa)
FNAPLV - National Federation of Modern Language Teachers' Associations (Federaçaõ Nacional das Associacões de Professores de Linguas Vivas)

2.2 List of universities offering studies in applied linguistics

Instituto Politécnico de LEIRIA (Instituto Politécnico de LEIRIA)
Universidade Aberta (Universidade Aberta)
Universidade de Coimbra (Faculdade de Letras)
Universidade de Lisboa (Faculdade de Letras)
Universidade do Porto (Faculdade de Letras)
Universidade Nova de Lisboa (Faculdade de Ciências Sociais e Humanas)

University of Évora (Departamento de Linguística e Literaturas)
University of Minho - BRAGA (Institute of Arts and Human Sciences)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Instituto Nacional de Estatística
Acronym:	INE
Name of office (English):	Statistics Portugal
Website:	http://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_main
National coding system:	CAE 2.1
Coding system based on:	NACE 1.1
Code for translation and interpreting:	unknown
Contacted?	Yes
Responded?	Yes
Data provided?	Yes
Data exploitable?	yes

3.2. Other authorities contacted

Name of authority in English	**Responded?**	**Data provided?**	**Data exploitable?**
Ministry of Finance	No	:	:
Institute of Registries	No	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

Statistics Portugal	2009	Data provided (2006)

Statistics Portugal uses an Economic Activity Classification named CAE (*Classificação das Actividades Económicas*) which is equivalent to the NACE up to the 4 digit level. The

corresponding CAE for NACE Rev. 2 is CAE Rev. 3. However, the requested data is not available by CAE Rev. 3 yet, only by the previous CAE Rev. 2.1.

Code 74.85 (secretarial and translation activities)					
	2006				
Employment size class	**Total**	**0 - 9**	**10-49**	**50 - 249**	**250 and more**
Number of enterprises	4947	4928	17	2	0
Number of persons employed	6031	5412	-	-	0
Turnover (€)	103 245 639	74 511 829	-	-	0
- no data available					

Figure 119 – Source: (Statistics Portugal, 2009)

Since the data above includes secretarial activities, an estimate of the proportion of translation and interpreting activities was performed based on the proportions provided by the French Institute of Statistics and Economic Studies (INSEE, 2007). The following table shows the proportion of translation and interpreting activities for 2006.

Code: translation and interpreting activities					
	2006				
Employment size class	**Total**	**0 - 9**	**10-49**	**50 - 249**	**250 and more**
Number of enterprises	1658	1651	6	1	0
Number of persons employed	1462	1312	-	-	0
Turnover (€)	27 113 203	19 567 454	-	-	0
Average turnover per business* (€)	16 355				
- no data available					
* manually calculated					

It is assumed that freelancers are included in this statistic. Firstly, because the table shows that the almost absolute entirety of enterprises operating in translation and interpreting activities are comprised in the employment size class “0-9 employees”. Secondly, because the average turnover per enterprise is quite low at 16 355 €.

Assuming that the yearly growth rate of 7.5% applies to Portugal as well (Beninatto & DePalma, 2007), the total turnover of translation and interpreting activities can be estimated at **31.3 million €** for 2008.

This figure lies far below the estimate provided by APET for the EUATC report (EUATC, 2005), where the translation market was estimated at 91 million € in 2004. Considering an annual

growth of 7.5% (Beninatto & DePalma, 2007) and adding interpreters (which account for 15% of the market) to this figure, the estimate for 2008 would amount to **143 million €**.

Considering that the language market in Portugal is very large because of the economic uplift of Brazil and consequently a large request for translations from and into Portuguese, we estimate that the total turnover for Portugal in 2008 lies at **87 million €** (the average of the two figures above).

EUATC - European Union of Associations of Translation Companies	2009	Practice in parts of Europe on sworn translations, notorisation and apostille

Educational / other requirements: What it takes to be accepted as a sworn/authorised/official translator

Everybody can act as a sworn translator, provided they swear before the judge that the translation or interpretation is faithful and correct.

Legalisation / notarisation / Apostille

24.40 € need to be paid to have the signature recognised by a notary.

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	~~
Association members (lit. trans. only):	~~
Number of (new) books published per year:	~~
Percentage of translations:	~~
Number of new works of literature per year:	~~
Percentage of translations in literature:	~~
Average annual income (turnover) of literary translators (€):	12 670
Average annual gross income of literary translators (€):	9,505
Average gross income in the manufacturing and services sectors^ (€):	14 715
Per capita GDP in terms of PPS^ (€):	16 700
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	65%

*: Figures from 2005 or earlier.

^: Source: Eurostat 2005/2006 data

~~ : No data available

Figure 120 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	17,267
Total EU-27:	1,220,037

Figure 121 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Portugese Sign Language
Sign language recognised?	1997(Sign Languages of Europe- Future Chances, Vera Krausneker, April 2000)
Deaf sign language users:	8000
Number of sign language interpreters currently working:	137
Hourly rate (€):	22.5
Interpreter organisation:	0 (previous AIGLP)

Figure 122 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
English:	192,016
French:	60,962
German:	5,260
Spanish:	2,896
Total:	**261,134**

Figure 123 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	**2006**
Zero:	126,762
One:	180,142
Two:	40,496
Three:	0
Four or more:	0

Figure 124 – Source: (Eurostat, 2009b)

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Portugal

The number of hours allocated for teaching foreign languages in school to the second cycle (5 and 6 years of schooling) of primary education is 80 hours. "Since 2005/06, 80 hours are also earmarked for teaching foreign languages in school years 3 and 4 (pupils aged 8-10) under the national programme of English teaching in the first cycle of primary school, " corresponding to the first four years of compulsory schooling (Eurydice P9 EACEA, 2008, p. 93).

FIPLV - World Federation of Modern Language Associations	2008	Manifesto for the Improvement of Language Teaching and Learning in Portugal

Some additional information on language teaching in Portugal is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Portugal.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Portugal.

5. Questionnaire

5.1. *Statistics on respondents from Portugal for each target group*

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Portugal:	**102/1152**
Individuals and small enterprises:	96/102
Language service providers:	6/102
Language service departments:	0/102

6. Estimate of volume and value of language market

Estimated volume (total number of persons employed in translation and interpreting activities, 2006): **1 462** (including freelancers)

Estimated value (total turnover of translation and interpreting activities, 2008): **87 million €** (including freelancers)

Country fact sheet – Romania

1. Country facts

Year of EU entry:	2007
Political system:	Republic
Capital:	Bucharest
Official language(s):	Romanian
Currency:	RON - Romanian leu
Exchange rate as at 19.05.2009 (1 €=...):	4.17
Population (million):	21.50
% of EU-27 total:	4.35%
Employment (million):	9.35
% of EU-27 total:	4.28%
Average gross annual earnings (€), 2006:	3,713
Level above/below EU-27 average:	-88.1%

2. Main actors

2.1. List of professional organisations contacted for the study

ABTR - Association of Romanian Translation Agencies
AFIT - Romanian Association of Translation and Interpreting Companies
ATR - Romanian Translators Association
QUEST - Romanian Association for Quality Language Services
Romanian Association of Teachers of English

2.2 List of universities offering studies in applied linguistics

Dunarea de Jos" University of Galati (Faculty of Letters and Theology)
Faculté des Lettres - CLUJ-NAPOCA (Faculty of Letters, Department of Applied Modern Languages)
Stefan cel Mare" University – Suceava (Faculty of Letters and Communication Sciences)
Transilvania University of Brasov (Faculty of Letters)
Université de CRAIOVA (Faculty of Letters - Department of Applied Modern Languages)
Université de l'Ouest - TIMISOARA (Faculty of Letters, History and Theology)
University of Bucharest (Faculty of Foreign Languages and Literatures)
University of IASI (Department of Applied Modern Languages)
University of SIBIU (Faculty of Letters and Arts)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Institut Nacional de Statistica si Studii Economice
Acronym:	INSSE
Name of office (English):	National Institute of Statistics and Economic Studies
Website:	http://www.insse.ro/cms/rw/pages/index.ro.do
National coding system:	CAEN 2
Coding system based on:	unknown
Code for translation and interpreting:	743 (Translation and interpretation activities)
Contacted?	Yes
Responded?	Yes
Data provided?	Yes
Data exploitable?	Yes

3.2. Other authorities contacted

Name of authority in English	**Responded?**	**Data provided?**	**Data exploitable?**
Ministry of Finance	No	:	:
Chamber of Commerce and Industry of Romania	No	:	:
National Trade Register Office	Yes	No (only list of companies; paid service)	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

Romanian National Statistics Office	2007	Response from NSO RO

The following table shows the data provided by the Romanian National Statistics Office.

code 743 (translation and interpretation activities)		
	data	**estimate**
	2007	**2008**
Number of businesses	1 613	
Turnover (lei)	16 1657 636	173 781 959
Turnover (€)	38 766 819	41 674 331
Number of employees	2 857	
Average turnover per business (€)	24 034	
* manually calculated		

Figure 125 – Source: (Romanian National Statistics Office, 2007)

The average turnover per business is relatively low, especially compared to the figures obtained by the analysis of the Romanian translation market (see below). We therefore assume that freelancers are included in the statistic. The resulting estimated turnover for 2008 amounts to **41.7 million €**.

Since the proportion of sole proprietors cannot be distinguished out of the total number of businesses, no estimates can be put forward regarding the total number of freelancers.

ABTR - Association of Romanian Translation Agencies	2007	Analysis for the Romanian translation market in 2007 (ROMANIAN)

Group	**Number of offices**	**Turnover**	
		2006	**2007**
A: Large group offices, with turnover above 300 000 €	15	10 182 310 €	
B: enterprises with turnover between 50 000 € and 300 000 €	44	4 880 870 €	
C: small offices with turnover of less than 50 000 €	29	1 069 661 €	
Total	88	8 695 990 €	16 132 842 €

Figure 126 – Source: (ABTR, 2007)

Main conclusions of the analysis:

- In total, the translation market has experienced an increase of 86% of turnover in 2007 compared to 2006.
- The market share of group A is relatively constant in 2007 compared to 2006.
- The turnover of group B has increased considerably, even though market share declines.
- The largest increase in turnover was registered for businesses belonging to group C, which market share has almost doubled in 2007 compared to 2006.

ABTR - Association of Romanian Translation Agencies	2004	Analysis for the Romanian translation market in 2004 (ROMANIAN)
ABTR - Association of Romanian Translation Agencies	2005	Analysis for the Romanian translation market in 2005 (ROMANIAN)
ABTR - Association of Romanian Translation Agencies	2006	Analysis for the Romanian translation market in 2006 (ROMANIAN)

Data about previous years is available in the reports above.

Hemera, Elekes	2008	The Eastern European translation market

In the Czech Republic, Slovakia, Hungary, Poland, Romania and Slovenia the size of the market is growing in terms of number of new agencies opening, the intensity of the life of associations and the translator community.

4.1.2. Literary translation

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	19 219
Total EU-27:	1 220 037

Figure 127 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Rumanian Sign Language
Sign language recognised?	2002
Deaf sign language users:	18 500
Number of sign language interpreters currently working:	:
Hourly rate (€):	:
Interpreter organisation:	No
: not available	

Figure 128 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)
Cristea	2009	Romanian Language Technology and Resources go to Europe

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
English:	808,723
French:	745,328
German:	69,730
Spanish:	10,112
Italian:	9,445
Portuguese:	297
Greek:	108
Total:	**1,643,743**

Figure 129 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	**2006**
Zero:	6,134
One:	453,984
Two:	578,690
Three:	13,043
Four or more:	0

Figure 130 – Source: (Eurostat, 2009b)

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Romania

Some additional information on language teaching in Romania is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Romania.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Romania.

5. Questionnaire

5.1. Statistics on respondents from Romania for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Romania:	**38/1152**
Individuals and small enterprises:	34/38
Language service providers:	4/38
Language service departments:	0/38

6. Estimate of volume and value of language market

Estimated value (total turnover of translation and interpreting activities, 2008): **42 million €** (including freelancers)
Estimated volume (total number of persons employed in 2007): **2 857** (excluding freelancers)

Country fact sheet – Slovakia

1. Country facts

Year of EU entry:	2004
Political system:	Republic
Capital:	Bratislava
Official language(s):	Slovak
Currency:	EUR - Euro
Population (million):	5.40
% of EU-27 total:	1.09%
Employment (million):	2.36
% of EU-27 total:	1.08%
Average gross annual earnings (€), 2006:	7,040
Level above/below EU-27 average:	-77.5%

2. Main actors

2.1. List of professional organisations contacted for the study

ATCSK - Association of Translation Companies of Slovakia
Faculty of Arts, Constantine the Philosopher University in Nitra, SK
LIC - Centre for Information on Literature (Literarne Informacne centrum (Slovakia))
SAAIC - Slovak Academic Association for International Co-operation
Slovak Association of Teachers of English
SSPOL - Slovak Society of Translators of Scientific and Technical Literature (Slovenská spoločnosť prekladateľov odbornej literatúry)

2.2 List of universities offering studies in applied linguistics

UMB – Matej Bel University (Faculty of Human sciences)
University of PRESOV (Institute of Translation and Interpretation)
Univerzity Komenského - BRATISLAVA (Filozofická fakulta)
ÚPJŠ – Pavol Jozef Šafárik Univesity in Košice (Faculty of Philosophy)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Statistický úrad Slovenskej republiky
Acronym:	SUSR
Name of office (English):	Statistical Office of the Slovak Republic
Website:	http://www.statistics.sk/
National coding system:	unknown
Coding system based on:	NACE 1.1
Code for translation and interpreting:	74.85
Contacted?	Yes
Responded?	Yes
Data provided?	No (referred to INFOSTAT)
Data exploitable?	N/A

3.2. Other authorities contacted

Name of authority in English	**Responded?**	**Data provided?**	**Data exploitable?**
Ministry of Finance	Yes	No	:
Slovak Chamber of Commerce & Industry	No	:	:
Slovak Investment and Trade	No	:	:
Ministry of Education	Yes	Yes	Partly
Ministry of Justice of the Slovak Republic	Yes	No (forwarded our request to Ministry of Culture, Ministry of Education and the Slovak Association of Translators and Interpreters)	:
INFOSTAT	Yes	Yes	Yes
Ministry of Finance	Yes	No (referred to Ministry of Education)	:
Ministry of Culture of the Slovak Republic	Yes	Yes	Yes (subtitling and dubbing)
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

INFOSTAT	2009	Response from INFOSTAT

Code 7485 (Secretarial and translation activities)	
	2008
turnover (1 000 EUR)	109 121
number of employees	1 188
number of businesses	4 796

Figure 131 – Source: (INFOSTAT, 2009)

Since the data above includes secretarial activities, an estimate of the proportion of translation and interpreting activities was performed based on the proportions provided by the French Institute of Statistics and Economic Studies (INSEE, 2007). The following table shows the proportion of translation and interpreting activities for 2008.

Translation and interpreting activities (with INSEE)	
	2008
Turnover (1 000 EUR)	28 656
Number of employees	288
Number of businesses	1 598
Average turnover per business* (€)	17 931
Average number of employees per business	
* manually calculated	

In the table above, the number of employees is six times smaller than the number of businesses. It is therefore assumed that freelancers are included in this statistic. Since the proportion of sole proprietors cannot be distinguished out of the total number of businesses, no estimates can be suggested regarding the total number of people active in translation and interpreting.

Hemera, Elekes	2008	The Eastern European translation market

Additional information about Slovakia is available in the report(s) above.

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	500
Association members (lit. trans. only):	350
Number of (new) books published per year:	9 638
Percentage of translations:	13%
Number of new works of literature per year:	731
Percentage of translations in literature:	approx.70%
Average annual income (turnover) of literary translators (€):	9 100
Average annual gross income of literary translators (€):	6 825
Average gross income in the manufacturing and services sectors^ (€):	7 040
Per capita GDP in terms of PPS^ (€):	12 900
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	**97%**
*: Figures from 2005 or earlier. ^: Source: Eurostat 2005/2006 data	

Figure 132 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	9 881
Total EU-27:	1 220 037

Figure 133 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Slovakian Sign Language
Sign language recognised?	No
Deaf sign language users:	55 000 (approx.)
Number of sign language interpreters currently working:	14
Hourly rate (€):	24.2
Interpreter organisation:	1.Slovak Association of Sign Language Interpreters 2. EFFETA-centre of St. Francis of Sales Samova 4,949 01 Nitra, Slovakia

Figure 134 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

Ministry of Culture of the Slovak Republic	2009	Information provided by the Slovak Television about subtitling and dubbing

The following table contains the data provided by the Slovak Television to the Division of International Cooperation, Department of Multilateral Cooperation of the Ministry of Culture of the Slovak Republic.

Year	Movie Dubbing (hours)	Documents (hours)	Subtitles (hours)
2006	1105.5	466.5	161
2007	1599.6	717.4	169.3
2008	1225.7	120.7	116.8

Figure 135 – Data provided by the Ministry of Culture, Slovak Republic

Slovakia is the only country for which reliable data was provided as regards the volume of subtitling and dubbing activities.
However, we were not able to retrieve any sources which allowed us to estimate the volume of subtitling and dubbing outside the Slovak Television.

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

Absolon	2008	A survey on the effectiveness of using computer assisted translation (CAT) tools
technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

INFOSTAT	2009	Response from INFOSTAT

Code 80421 (education in foreign language schools)	
	2008
Turnover (1 000 SKK)	625 659
turnover (1 000 EUR)	20 768
number of employees	359
number of businesses*	759
* including entrepreneurs	

Figure 136 – Source: (INFOSTAT, 2009)

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
English:	213,207
German:	177,442
French:	20,060
Slovak:	13,292
Spanish:	4,508
Italian:	1,017
Total:	**429,526**

Figure 137 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	**2006**
Zero:	503
One:	142,652
Two:	145,837
Three:	2,253
Four or more:	0

Figure 138 – Source: (Eurostat, 2009b)

Butašová et al	2007	Conception of Teaching Foreign Languages at Primary Schools and Secondary Schools

Pupils may choose from the offer of the following 6 languages: English, German, French, Russian, Spanish and Italian. However, the choice offered by the schools is usually more limited, depending on the availability of qualified vs. unqualified teachers of foreign languages (Butašová et al, 2007, p. 12).

The following table summarises the number of learners of foreign languages at all school levels in Slovakia

	English	**French**	**German**	**Russian**	**Spanish**	**Italian**	**Other**	**n.e.c.**	**Total**
PS-1st level	75099	235	23234	390	0	0	0	147395	**246353**
PS-2nd level	204391	5578	132579	15501	19	21	0	832	**358921**
1st – 4th grades at eight-year Gymnasiums	18322	1969	9238	297	338	0	18	0	**30182**
SS (GYM)	76821	10698	60927	2581	2954	671	100	0	**154752**
SS (SVS)	69355	4862	54514	3315	609	377	47	286	**133365**
SS (ZSS)	29039	1683	31937	2132	40	0	0	1037	**65868**
SS (SAS)	34539	513	43132	3605	0	27	0	3636	**85452**
Total	**507566**	**25538**	**355561**	**27821**	**3960**	**1096**	**165**	**153186**	**1074893**

Figure 139 – Number of learners of foreign languages at all school levels (Butašová et al, 2007, pp. 13-20)

The table below shows the number of teachers per language taught at all school levels, and the total number of hours taught.

	primary school		gymnasiums		secondary school	
	Teachers	**Hours taught**	**Teachers**	**Hours taught**	**Teachers**	**Hours taught**
English	960	4394	943	15156	821	12135
German	649	2582	768	11729	781	10765
French	12	40	184	2049	101	992
English conversation	46	110	430	1394	140	468
Conversation in German	48	98	254	648	140	496
Russian	11	38	90	423	102	645
Spanish	:	:	47	558	11	71
Latin	:	:	38	170	24	170
Specialised English	:	:	2	35	25	239
Italian	:	:	12	150	10	94
French conversation	:	:	45	132	15	48
Specialised German	:	:	:	:	22	153
Slovak conversation	:	:	:	:	27	108
Specialised English conversation	:	:	:	:	23	64
Spanish conversation	:	:	10	52	2	3
Russian conversation	:	:	11	26	6	12
Specialised German conversation	:	:	2	6	12	32
Specialised French	:	:	:	:	2	22
Specialised Russian	:	:	:	:	4	11
Conversation in the Italian language	:	:	2	6	1	3
Specialised Italian	:	:	:	:	1	5
Specialised French conversation	:	:	:	:	1	2
Total	**1726**	**7262**	**2838**	**32534**	**2271**	**26538**
: not available at this type of school						

Figure 140 – Source: (Butašová et al, 2007, p. 30)

Council of Europe	2007	Language Education Policy Profile - Slovakia (FRENCH)
De Jaegher, Vaškaninová	nd	Politika viacjazyčnosti európskej komisie a viacjazyčnosť' v kontexte Slovenskej republiky (SLOVAK)

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Slovakia
Gadusova	2009	Info on BSc. and M.A. and PhD. courses in translation and interpretation, Constantine the Philosopher University in Nitra
University of Economics in Bratislava	2009	Foreign Language Tuition

Some additional information on language teaching in Slovakia is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Slovakia.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Slovakia.

5. Questionnaire

5.1. Statistics on respondents from Slovakia for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Slovakia:	**13/1152**
Individuals and small enterprises:	13/13
Language service providers:	0/13
Language service departments:	0/13

6. Estimate of volume and value of language market

Estimated value (total turnover of translation and interpreting activities, 2008): **29 million €** (including freelancers)**.**

No estimate can be put forward regarding the total number of persons active in translation and interpreting.

Country fact sheet – Slovenia

1. Country facts

Year of EU entry:	2004
Political system:	Republic
Capital:	Ljubljana
Official language(s):	Slovenian
Currency:	EUR - Euro
Population (million):	2.00
% of EU-27 total:	0.40%
Employment (million):	0.99
% of EU-27 total:	0.45%
Average gross annual earnings (€), 2006:	Not available
Level above/below EU-27 average:	Not applicable

2. Main actors

2.1. List of professional organisations contacted for the study

Centre for Slovene as a second/foreign language
DZTPS - Association of Scientific and Technical Translators of Slovenia
International Association of Teachers of English as a Foreign Language - Slovenia
SDUTSJ - Slovene Association of LSP Teachers
ZKTS – Slovene association of conference interpreters

2.2 List of universities offering studies in applied linguistics

University of LJUBLJANA (Faculty of Arts)
University of Maribor (Faculty of Arts)
University of Primorska (Faculty of Humanities)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Statisticni urad Republike Slovenije
Name of office (English):	Statistical Office of the Republic of Slovenia
Website:	http://www.stat.si/

National coding system:	unknown
Coding system based on:	NACE 1.1
Code for translation and interpreting:	M 74.3 (Translation and interpreting activities)
Contacted?	Yes
Responded?	Yes
Data provided?	Yes (helped with data extraction)
Data exploitable?	Yes

3.2. Other authorities contacted

Name of authority in English	Responded?	Data provided?	Data exploitable?
Ministry of Finance	No	:	:
Chamber of Commerce and Industry of Slovenia	Yes	No (payable service)	:
Agency of the Republic of Slovenia for Public Records and Services (AJPES)	Yes	Yes	Yes
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

National Statistics Office Slovenia	2009	Average monthly wages, Slovenia

Average monthly wages for 2008, code M74.3 (translation and interpretation activities): **1463.17 €**

Resulting yearly wage: **17 558 €**.

AJPES - Agency of the Republic of Slovenia for Public Legal Records and Related Services	2009	Data on enterprises in required activities in the years 2004 to 2007

Data provided by AJPES

Data on enterprises in required activities in the years 2004 to 2007

74.851 (Translation)					
	actual data				estimate
	2004	2005	2006	2007	2008
No. of enterprises	55	58	78	85	96.5
No. of employees	75	101	124	172	196.5
Net sales (€)	6 013 229	7 408 561	11 270 823	14046415	1 6675 212
Yearly wages (€)	996 967	1 325 696	1 832 524	2 876 851	3 294 630
Yearly wage per employee (€)	13 252	13 170	14 730	16 726	17 465
* manually calculated					

Figure 141 – Source: (AJPES, 2009)

Data on sole proprietors in required activities in the years 2004 to 2007					
74.851 (Translation)					
	actual data				estimate
	2004	2005	2006	2007	2008
No. of sole proprietors	136	206	247	319	374.5
No. of employees*	7	11	19	34	40
Net sales (EUR)	2 808 942	4 386 140	5 883 824	8 319 734	9 857 175
* Sole proprietor does not count as an employee.					

Figure 142 – Source: (AJPES, 2009)

Data on enterprises AND sole proprietors in required activities in the years 2004 to 2007					
74.851 (Translation)					
	Actual data				estimate
	2004	2005	2006	2007	2008
Total number of persons active	218	318	390	525	611
Total net sales in EUR	8 822 171	11 794 701	17 154 647	22 366 149	26 532 387

Figure 143 – Summary table

The table above only describes translation activities. Since interpreters represent 15% of the total turnover of the language market (EUATC, 2005), the total turnover for translation and interpreting activities in Slovenia in 2008 is estimated at **31 214 €.**

Fiser	2008	Recent trends in the translation industry in Slovenia

Hemera, Elekes	2008	The Eastern European translation market

Additional information on translation and interpreting in Slovenia can be found in the report(s) above.

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	approx.280
Association members (lit. trans. only):	210
Number of (new) books published per year:	4,340
Percentage of translations:	25%
Number of new works of literature per year:	928
Percentage of translations in literature:	42%
Average annual income (turnover) of literary translators (€):	16,310
Average annual gross income of literary translators (€):	12,235
Average gross income in the manufacturing and services sectors^ (€):	17110^^
Per capita GDP in terms of PPS^ (€):	18,700
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	**72%**

*: Figures from 2005 or earlier.

^: Source: Eurostat 2005/2006 data

^^ Eurostat data, average estimated on the basis of OECD data

in bold: figures not very significant due to the lower average income of the manufacturing and services sector in countries that are still lagging far behind the rest of the EU in terms of economic development

Figure 144 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	11 651
Total EU-27:	1 220 037

Figure 145 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**
English:	104,423
German:	60,956
Italian:	11,371
French:	4,229
Spanish:	2,464
Hungarian:	324
Slovene:	61
Total:	**183,828**

Figure 146 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	**2006**
Zero:	2,747
One:	44,936
Two:	62,827
Three:	4,467
Four or more:	0

Figure 147 – Source: (Eurostat, 2009b)

Council of Europe	2006	Language Education Policy Profile - Slovenia

English occupies a predominant position in the education system. In compulsory education 85% of the pupils are studying this foreign language with a total of 655 periods of 45 minutes each, i.e. about 490 hours in total. German is chosen by 15% of pupils. It is considered necessary to learn at least two foreign languages, but only some schools meet this requirement in the normal curriculum. Pupils who do not continue their training in general secondary education mostly learn only one language (Council of Europe, 2006, p. 19).

The Country Report states that a second foreign language like German, English, French, Italian, Spanish or Russian is studied in some four-year programmes. In general education programmes (the so-called *gimnazija*) and in some technical programmes it is compulsory while only one foreign language - if any - is taught in vocational schools (Council of Europe, 2006, p. 19).

Young adults are open to language diversification and therefore many children follow private foreign language courses out of school both in English and in other languages (Council of Europe, 2006, p. 19).

In 2003, the language choices – according to the Ministry of Education, Science and Sport – were as follows:

Foreign language	**Number of pupils**
English	103 424
German	67 943

French	3 152
Italian as a foreign language	10 344
Italian for the Italian minority	1 841
Spanish	399
Hungarian as a foreign language	0
Hungarian for the Hungarian minority	546
Russian	14
Classical Greek	86
Latin	2 136
Total	**189885**

Figure 148 – Source: (Council of Europe, 2006, p. 20)

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Slovenia

Some additional information on language teaching in Slovenia is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Slovenia.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Slovenia.

5. Questionnaire

5.1. Statistics on respondents from Slovenia for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Slovenia:	**13/1152**
Individuals and small enterprises:	7/13
Language service providers:	4/13

6. Estimate of volume and value of language market

Estimated volume (total number of persons active in secretarial and translation activities, 2008): **611** (including freelancers)

Estimated value (total net sales of secretarial and interpreting activities, 2008): **31 million €** (including freelancers)

Country fact sheet – Spain

1. Country facts

Year of EU entry:	1986
Political system:	Constitutional monarchy
Capital:	Madrid
Official language(s):	Spanish
Currency:	EUR - Euro
Population (million):	45.30
% of EU-27 total:	9.17%
Employment (million):	20.36
% of EU-27 total:	9.32%
Average gross annual earnings (€), 2006:	21,150
Level above/below EU-27 average:	-32.4%

2. Main actors

2.1. List of professional organisations contacted for the study

ACEtt - Spanish Literary Translators Association
ACT - Spanish association of translation centres (Agrupacion de Centros especialiyados en Traduccion)
AGPTI - Galician Association of Professional Translation and Interpretation (Asociación Galega de Profesionais da Traducción e da Interpretación)
AICE - Spanish Association of Conference Interpreters (Asociación de Intérpretes de Conferencia de España)
AIETI - Iberian Association of Translation Studies and Interpretation (Asociación Ibérica de Estudios de Traducción e Interpretación)
APETI - Spanish Professional Association of Translators and Interpreters (Asociación Profesional Española de Traductores e Interprétes)
APFUE - Association of Teachers of French in the Spanish University (Asociación de Profesores de Frances de la Universidad Española)
APTIC - Professional Association of Translators and Interpreters of Catalonia (Associació Professional de Traductors i Intèrprets de Catalunya)
Aragonese Association of Teachers of German (Asociación Aragonesa de Germanistas y Profesores de Alemán)

ASATI - Aragonese Association of Translators and Interpreters (Asociación Aragonesa de Traductores e Intérpretes)
ASELE - Association for the Teaching of Spanish as a foreign language (Asociación para la ensenañza del españnol como lengua extranjera)
ASETRAD - Spanish association of translators, revisers/editors and interpreters (Asociación Española de Traductores, Correctores e Intérpretes)
Association of Teachers of French in Valencia (Asociación de Profesores de Frances de Valencia)
Association of Translators, Correctors and Interpreters of the Basque Language (Asociación Profesional de Traductores, Correctores e Intérpretes de Lengua Vasca)
XARSATIV - Network of translators and interpreters of the Valencia Region (Red de traductores e intérpretes de la Comunidad Valenciana)

2.2 List of universities offering studies in applied linguistics

Universdad de MÁLAGA (Facultad de filosofía y letras, Departamento de traducción e interpretación)
Universidad Alfonso x el sabio (Universidad Alfonso x el sabio)
Universidad Antonio de Nebrija (Departamento Lenguas Aplicadas)
Universidad Complutense de Madrid (Centro de Estudios Superiores Felipe II)
Universidad de Alicante (Departamento de Traducción e Interpretación)
Universidad de GRANADA (Faculty of Translation and Interpreting)
Universidad de SALAMANCA (Facultad de traducción y documentación)
Universidad de Valladolid (Facultad de Traducción)
Universidad europea de Madrid (Facultad de Comunicación y Humanidades)
Universidad Pablo de Olavide de Sevilla (Facultad de Humanidades)
Universidade de Vigo (Facultade de Filoloxía e Tradución (Phylology and Translation Faculty))
Universitat Autònoma de BARCELONA (Facultat de traducció i d'interpretació)
Universitat Jaume I, Castellón (Universitat Jaume I, Castellón)
Universitat Pompeu Fabra, BARCELONA (Faculty of Translation and Interpreting)
Université Pontificia Comillas de MADRID (Translation and Interpreting)
University of Murcia (Facultad de letras)
University of Vic (Facultat de Ciències Humanes, Traducció i Documentació)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Instituto Nacional de Estadística
Acronym:	INE
Name of office (English):	National Statistics Institute

Website:	http://www.ine.es/
National coding system:	CNAE 93 Rev.1
Coding system based on:	NACE 1.1
Code for translation and interpreting:	74832
Contacted?	Yes
Responded?	Yes
Data provided?	No
Data exploitable?	N/A

3.2. Other authorities contacted

Name of authority in English	Responded?	Data provided?	Data exploitable?
Ministry of Finance	No	:	:
Chamber of Commerce	No	:	:
The Spanish partner of the European Business Register	No	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

ACT - Agrupacion de Centros especializados en Traduccion	2004	Estudio de mercado de la traducción en España 2004 (SPANISH)

Main findings:

Most translation agencies have an average of less than 4 full-time employees. The majority of them are SMEs and micro enterprises.

Average turnover of translation companies (including big companies): **295 000 € per annum**. Small companies only: **238 000 € per annum**.

Out of the total, only 35% of the companies have more than 10 years experience. 13% has less than 3 years experience, which shows a slowdown in the creation of new translation companies.

The main languages translated into and from Spanish are: English (43%), German (22%) and French (18%).

Prices charged by translation agencies:

EN-ES: General 0.79 €, Specialized 0.88 €, Sworn 0.11 €.

ES-EN: General 0.83 €, Specialized 0.92 €, Sworn 1.19 €.

... of which fees given to the translators:

EN-ES: General 0.49 €, Specialized 0.53 €, Sworn 0.71 €.

ES-EN: General 0.52 €, Specialized 0.57 €, Sworn 0.19 €.

Companies make a **profit of 38%** (considering the translator's salary and without taking into consideration other expenses like revision, internet, etc). The translator's fee corresponds to 62% of the final price.

The main clients of translation companies are mainly private Spanish businesses, foreign private companies (mainly from France, Germany, UK, Belgium and the US).

According to the interviewees, the main challenges translation companies are faced with are quality, price, competition with other companies and the use of new technologies.

Type of translators: translators that create a company but do not employ any staff, team of translators (usually 2 to 4 translators) and freelance translators.

Around 3,000 words are translated per day by translators.
The average annual turnover of translators is **21 118 €.** Freelancers tend to have less profit (**15 821 € per annum**) than translators belonging to a company or to a team of translators.

Active Language Providers

Employees	Natural Persons	Societies	Others	Total
Less than 2	3201	248	0	**3499**
2 to 4	250	200	100	**550**
5 to 19	14	110	26	**150**
20 to 99	0	20	0	**20**
More than 99	0	1	0	**1**
Total	**3465**	**579**	**126**	**4170**

According to the 2005 EUATC report (EUATC, 2005), the Spanish translation market for 2004 was estimated at 247 million €. Considering an annual growth of 7.5% (Beninatto & DePalma, 2007) and including interpreters (accounting for 15% of the market) into this figure, the estimated turnover for translation and interpreting in 2008 reaches **388 million €**.

Since no other data has been made available by any authority, this is the only possible estimate for Spain.

EUATC - European Union of Associations of Translation Companies	2009	Practice in parts of Europe on sworn translations, notorisation and apostille

Educational / other requirements: What it takes to be accepted as a sworn/authorised/official translator

Sworn translators need to pass an exam by the Spanish Foreign Office. Alternatively, they need to have a university degree in translation, with a certain number of academic credits on legal and economic translation.

The Rights/ duties of a sworn translator

Sworn translators are allowed to translate and interpret official documents and in court. In general, sworn translators translate into their target language, although exceptions can be made.

Legalisation / notarisation / Apostille

A sworn translation can either just carry the stamp of the translator, or it can be legalised by a stamp of the Spanish Foreign Office stating that the translator is on the official list.

Navas, Palomares	2002	Un estudio del mercado español de la traducción en la internet (SPANISH)

Additional information on the translation market in Spain can be found in the report(s) above.

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	approx.800-900
Association members (lit. trans. only):	500
Number of (new) books published per year:	approx.60,000
Percentage of translations:	35%
Number of new works of literature per year:	approx. 22 000

Percentage of translations in literature:	35%
Average annual income (turnover) of literary translators (€):	21 825
Average annual gross income of literary translators (€):	16 370
Average gross income in the manufacturing and services sectors^ (€):	21 150
Per capita GDP in terms of PPS^ (€):	23 100
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	77%
*: Figures from 2005 or earlier. ^: Source: Eurostat 2005/2006 data	

Figure 149 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	209,644
Total EU-27:	1,220,037

Figure 150 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Spanish Sign Language
Sign language recognised?	yes
Deaf sign language users:	1,000,000
Number of sign language interpreters currently working:	700
Hourly rate (€):	60.0
Interpreter organisation:	FILSE – the Spanish Federation for Sign Language Interpreters and Guide-Interpreters for the Deaf-Blind

Figure 151 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

ACT - Agrupacion de Centros especializados en Traduccion	2004	Estudio de mercado de la traducción en España 2004 (SPANISH)

Percentage of companies using...

- CAT tools: 56%%
- MT: 11%
- desktop publishing: 42%,
- Multimedia systems: 55%,
- telephone interpreting systems: 25%,
- videoconference software: 9%,
- localization programmes: 27%,
- other types of technology: 5%
- No technology at all: 20%.

Most common translation programmes: TRADOS (49%) and Déjà-Vu (9%)

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	2006
English:	674,399
French:	186,193
German:	12,631
Italian:	3,610
Portuguese:	628
Greek:	90
Dutch:	50
Swedish:	39
Romanian:	15
Danish:	8
Finnish:	7
Irish:	6
Total:	877,676

Figure 152 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	2006
Zero:	28,110
One:	522,707
Two:	177,300
Three:	588
Four or more:	0

Figure 153 – Source: (Eurostat, 2009b)

Butašová et al	2007	Conception of Teaching Foreign Languages at Primary Schools and Secondary Schools
Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Spain

Some additional information on language teaching in Spain is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Spain.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Spain.

5. Questionnaire

5.1. Statistics on respondents from Spain for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Spain:	**117/1152**
Individuals and small enterprises:	102/117
Language service providers:	10/117
Language service departments:	5/117

6. Estimate of volume and value of language market

The data collected was not sufficient to estimate the volume of the language market in Spain. The value of translation and interpreting activities was estimated at **388 million €** in 2008, based on findings of the 2004 ACT study.

Country fact sheet – Sweden

1. Country facts

Year of EU entry:	1995
Political system:	Constitutional monarchy
Capital:	Stockholm
Official language(s):	Swedish
Currency:	SEK - Krona
Exchange rate as at 19.05.2009 (1 €=...):	10.60
Population (million):	9.20
% of EU-27 total:	1.86%
Employment (million):	4.54
% of EU-27 total:	2.08%
Average gross annual earnings (€), 2006:	35,084
Level above/below EU-27 average:	12.1%

2. Main actors

2.1. List of professional organisations contacted for the study

FAT - Association of Professional Translators (Föreningen Auktoriserade Translatorer)
LMS - Modern Language Teachers' Association of Sweden (Riksföreningen för Lärarna i Moderna Språk)
SFÖ - Swedish Association of Professional Translators (Sveriges Facköversättarförening)
SI - Swedish Institute (Svenska institutet)
Swedish Union for Theatre, Artists and Media
Swedish Writers' Union, Translators' Section

2.2 List of universities offering studies in applied linguistics

Linköping University (Department of Culture and Communication)
Lunds universitet (Översättarutbildningen, Språk- och litteraturcentrum)
Stockholm University (Tolk- och översättarinstitutet (TÖI), /Institute for Interpretation and Translation Studies)
Uppsala university (Dpt of Scandinavian Languages)
Växjö University (Institutionen för humaniora)

3. Statistical data

3.1. National Statistics Office

Name of office (original language):	Statistiska Centralbyrån
Acronym:	SCB
Name of office (English):	Statistics Sweden
Website:	http://www.scb.se/
National coding system:	SNI 2007
Coding system based on:	NACE 2
Code for translation and interpreting:	743 (translation and interpretation activities)
Contacted?	Yes
Responded?	Yes
Data provided?	No (payable service and they could only provide list of companies)
Data exploitable?	N/A

3.2. Other authorities contacted

Name of authority in English	Responded?	Data provided?	Data exploitable?
Ministry of Finance	Yes	No (referred us to Statistics Sweden)	:
Swedish Companies Registration Office	Yes	No (referred us to Statistics Sweden)	:
Swedish Patent and Registration Office	No	:	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

SFÖ - Swedish Association of Professional Translators	2007	Survey of Rates

This report is the first such picture in the 15 year life of the association, hence no comparison with previous data is possible.

The association conducted a survey among its members and obtained a total of 416 responses.

Main results:

- **Services offered**: 402 respondents offer translation services, 299 proofreading, 273 language revision, 120 editing, 57 copywriting, 17 dubbing/voiceovers, 32 subtitling, 55 localisation, 21 glossary compilation and 22 'other' translation-related services (including interpreting, language consultancy, on-site document review, validation of technical terms in English, layout work, transcription, training services and administrative services).
- Translators are feeling downward pressures from translation agencies. One potential way to raise the income is to increase productivity by using tools (e.g. translation memory and dictation software).
- **Translation output**: 54% translate on average less than 2000 words per day. 22% have an average daily output of more than 2500 words. 34% translate on average more than 4000 words per day. 3 members translate more than 5000 words daily.
- Respondents were mainly sole traders.
- **Annual income**:
    - 32.6%: less than SEK 150 000 (14 150 €)
    - 46% : between SEK 150 000 and 200 000 (14 150 € and 18 868 €).
- 73.5% of respondents base their rate per word on source text, which is standard practice in Sweden, but not in Finland.
- **Average standard rate**: SEK 1.72 (0.16 €) for direct clients and SEK 1.29 (0.12 €) for translation agencies.
- **Average hourly rate for translation services**: SEK 482.97 (45.56 €) for direct clients and SEK 368.64 (34.78 €) for agencies.

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	approx. 650
Association members (lit. trans. only):	550

Number of (new) books published per year:	2 886
Percentage of translations:	45%
Number of new works of literature per year:	644
Percentage of translations in literature:	52%
Average annual income (turnover) of literary translators (€):	34 510
Average annual gross income of literary translators (€):	25 880
Average gross income in the manufacturing and services sectors^ (€):	34 049
Per capita GDP in terms of PPS^ (€):	26 900
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	70%
*: Figures from 2005 or earlier. ^: Source: Eurostat 2005/2006 data	

Figure 154 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	21 071
Total EU-27:	1 220 037

Figure 155 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	Swedish Sign Language
Sign language recognised?	1981
Deaf sign language users:	10 000
Number of sign language interpreters currently working:	450

Hourly rate (€):	25.0
Interpreter organisation:	Sveriges teckenspråkstolkars förening (STTF)

Figure 156 – Source: (de Wit, 2008)

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

SFÖ - Swedish Association of Professional Translators	2007	Survey of Rates

Main finding: the dominant product among SFÖ members is Trados, which is used by 244 out of 416 respondents, followed by SDLX (47), Wordfast (44), STAR Transit (39), Deja Vu (21) and LogoPort (18).

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	**2006**

English:	83,844
Spanish:	17,189
German:	13,346
French:	9,128
Italian:	4,621
Finnish:	300
Danish:	295
Polish:	126
Greek:	100
Hungarian:	25
Portuguese:	21
Czech:	1
Dutch:	1
Latvian:	1
Slovene:	1
Total:	**128,999**

Figure 157 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	**2006**
Zero:	487
One:	44,283
Two:	31,734
Three:	7,003
Four or more:	903

Figure 158 – Source: (Eurostat, 2009b)

Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - Sweden

Some additional information on language teaching in Sweden is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for Sweden.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for Sweden.

5. Questionnaire

5.1. Statistics on respondents from Sweden for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in Sweden:	**17/1152**
Individuals and small enterprises:	15/17
Language service providers:	1/17
Language service departments:	1/17

6. Estimate of volume and value of language market

The data collected was not sufficient to estimate the volume and value of the language market in Sweden.

However, two of the largest LSPs worldwide are headquartered in Sweden: Semantix A/B with a total turnover of 36.2 million € in 2008 (ranked 15th worldwide) and CBG Konsult AB, generating a total turnover of 19.4 million € in 2008 and ranked 27th worldwide (Beninatto & Kelly, 2009).

This implies that the language market is worth at least **55.6 million €** in Sweden.

Country fact sheet – United Kingdom

1. Country facts

Year of EU entry:	1973
Political system:	Constitutional monarchy
Capital:	London
Official language(s):	English
Currency:	GBP - Pound sterling
Exchange rate as at 19.05.2009 (1 €=...):	0.88
Population (million):	60.40
% of EU-27 total:	12.23%
Employment (million):	28.44
% of EU-27 total:	13.02%
Average gross annual earnings (€), 2006:	44,496
Level above/below EU-27 average:	42.1%

2. Main actors

2.1. List of professional organisations contacted for the study

ALL - Association for Language Learning
ABPCO - Association of British Professional Conference Organisers
ASLI - Association of Sign Language Interpreters
ATC - Association of Translation Companies
British Council
CILT - National Centre for Languages
CROESO - Association of Welsh Translators and Interpreters
FBCC - French Chamber of Commerce in Great Britain GBCIC - German-British Chamber of Industry & Commerce
IOL - Chartered Institute of Linguists
ITI - Institute of Translation & Interpreting
MLANI - Modern Language Association of Northern Ireland

NICILT - Northern Ireland Centre for Information on Language Teaching and Research
RLN - Regional Language Network London
Society of Authors - Translation Association
SUBTLE - Subtitlers' Association

2.2 List of universities offering studies in applied linguistics

Aston University - BIRMINGHAM (Languages and social sciences)
City University - LONDON
Herriot-Watt University - EDINBURGH
Imperial College - LONDON
Middlesex University - LONDON
University of BATH
University of BRISTOL
University of East Anglia
University of Exeter (
University of LEEDS
University of MANCHESTER
University of PORTSMOUTH
University of SALFORD
University of Surrey - GUILFORD
University of Wales, Bangkor
University of Wales, SWANSEA
University of Westminster - LONDON
Newcastle University (School of Modern Languages)

3. Statistical data

3.1. National Statistics Office

Name of office:	Office for National Statistics | UK Statistics Authority
Website:	http://www.statistics.gov.uk/hub/index.html
National coding system:	UKSIC(2003)
Coding system based on:	NACE 1.1
Code for translation and interpreting:	7485 (Secretarial and translation activities)
Contacted?	Yes

Responded?	Yes
Data provided?	No (referred us to CILT – the National Centre for Languages)
Data exploitable?	N/A

3.2. Other authorities contacted

Name of authority in English	Responded?	Data provided?	Data exploitable?
British Chambers of Commerce	No	:	:
Companies House	Yes	No	:
Inter-departmental Business Register	Yes	No (pointed us to a set of studies)	:
Trade Info - HM Revenue & Customs (HM Customs and Excise)	Yes	No (referred us to national statistics office)	:
BERR - UK Department for Business, Enterprise and Regulatory Reform	Yes	Yes	Yes
UK Trade Invest	Yes	No	:
: not applicable			

4. Materials collected per sector

4.1. Translation and Interpreting

4.1.1. General translation

BERR - Department for Business Enterprise & Regulatory Reform	2009	Business- Activity, Size, Location

Data provided by the BERR only includes businesses registered for either VAT and/or PAYE, hence does not include a large number of small businesses and sole proprietorships.

UKSIC(2003): 7485 - Secretarial and translation activities, including translation and interpretation services. This is the finest breakdown for the UK

Number of VAT and/or PAYE based enterprises in 2008. Class By Employment Size Band							
Employment size							
0 - 4	**5 - 9**	**10 - 19**	**20 - 49**	**50 - 99**	**100 - 249**	**250 +**	**TOTAL**
2,165	205	105	85	25	15	10	2,610

Number of VAT and/or PAYE based enterprises in 2008. Class By Turnover Size Band							
Turnover size (£ thousand)							
0 - 49	**50 - 99**	**100 - 249**	**250 - 499**	**500 - 999**	**1,000 - 4,999**	**5,000 +**	**TOTAL**
1,025	680	455	160	120	135	35	2,610

The tables above show the distribution of turnover and employment among businesses which main activity are secretarial and translation activities.

If the proportions provided by INSEE apply to the United Kingdom as well, the amount of businesses active within translation and interpreting activities out of the figures above amounts to 875 businesses.

Due to the high amount of businesses with 0-4 employees (83%), we assume that freelancers are included in the figures above.

Based on the number of businesses per turnover size, the total turnover for the minimum and the maximum value were established. The resulting total turnover ranges between £ 489.5 million and £ 1.45 billion. Considering that these figures apply to enterprises active within secretarial and translation activities, the proportion for translation and interpreting activities was retrieved according to the figures provided by INSEE (2007). The resulting total estimated turnover ranges from a minimum of **146 million €** to a maximum of **434.3 million €**.

In 2004 (EUATC, 2005), the total turnover of the UK market of translation was estimated at between 300 million € and 480 million € by ATC. Assuming an annual growth of 7.5% of the translation turnover (Beninatto & DePalma, 2007) and adding interpreters (which account for 15% of the market) to this figure, the total turnover for 2008 increases to between **471 million € and 754 million €**.

Taking into consideration the estimate provided by ATC, we assume that the total turnover of the translation and interpretation market in the United Kingdom lies in the upper half of the range calculated above and is therefore estimated between **290 million € and 434 million €**.

Companies House	2009	Data provided for feb 2009 (number of businesses)

As at 29th February 2009 there were 2409 companies registered in the Companies House records with the Standard Industrial Classification Code of 7485 (Secretarial and Translation activities). Applying the proportion provided by INSEE (2009), it can be estimated that of this figure, **807** businesses are within translation and interpretation activities.

Merlin Scott Associates Limited	2009	Industry Report - Translation Services

	2003	2004	2005	2006	2007	2008
turnover per employee (£)	74 744	103 263	110 772	126 233	129 381	125 456
average wage (£)	23 994	27 753	29 796	31 403	33 253	33 614

Top 5 companies, ranked by turnover:

Name of company	Turnover in 2008 (£)
Merill Corporation Ltd.	44 814 000
Thebigword Holdings Limited	21 333 000
Link Up Mitaka Limited	20 879 000
Cintra Limited	3 415 962
Clarion Interpreting Limited	810 114

EUATC - European Union of Associations of Translation Companies	2009	Practice in parts of Europe on sworn translations, notorisation and apostille

Educational / other requirements: What it takes to be accepted as a sworn/authorised/official translator

Members of the Association of Translation Companies (ATC) and the Institute of Translating and Interpreting (ITI) are recognised by the Home Office, other government bodies and the courts. Evidence of an official translation can be provided by these translators through a stamp which can be applied onto translators and which identifies them uniquely.

Legalisation / notarisation / Apostille

The UK does not have notarisation (a translator takes their translation and personal identification to a notary public who states that the person who has presented the translation is the person on the identification, but does not offer any 'guarantee' about the translation.)

4.1.2. Literary translation

CEATL - European Council of Literary Translators' Associations	2008	Comparative income of literary translators in Europe

Number of active literary translators:	~~
Association members (lit. trans. only):	465
Number of (new) books published per year:	125,000
Percentage of translations:	3%
Number of new works of literature per year:	~~
Percentage of translations in literature:	~~
Average annual income (turnover) of literary translators (€):	41,000
Average annual gross income of literary translators (€):	30,750
Average gross income in the manufacturing and services sectors^ (€):	42,866
Per capita GDP in terms of PPS^ (€):	27,300
Literary translators' average gross income in proportion to that in the manufacturing and services sector, average:	72%
*: Figures from 2005 or earlier. ^: Source: Eurostat 2005/2006 data ~~ : No data available	

Figure 159 – Source: (CEATL, 2008)

UNESCO	2009	Index Translationum

Cumulative bibliographical information on books translated and published since 1979:	14 182
Total EU-27:	1 220 037

Figure 160 – Source: (UNESCO, 2009)

Wischenbart	2008	Diversity Report 2008: Translation Statistics Across Europe

Additional information on this sector is available in the report(s) above.

4.1.3. Sign language interpreting

deWit	2008	Sign Language Interpreting in Europe

Sign language:	British Sign Language

Sign language recognised?	2004
Deaf sign language users:	50,000
Number of sign language interpreters currently working:	450
Hourly rate (€):	38.5
Interpreter organisation:	Association of Sign Language Interpreters for England, Wales & Northern Ireland (ASLI)

Figure 161 – Source: (de Wit, 2008)

ASLI - Association of Sign Language Interpreters	2001	Fees & Salaries report 2001
ASLI - Association of Sign Language Interpreters	2006	Fees & Salaries report 2006
ASLI - Association of Sign Language Interpreters	2008	Fees & Salaries report 2008

Additional information about sign language interpreting can be found in the reports above.

4.2. Subtitling and dubbing

MCG / Peacefulfish	2007	Study on Dubbing and Subtitling Needs and Practices in the European Audiovisual Industry
SUBTLE - Subtitlers' Association	2009	Phone interview with secretary

Some information on this sector is available in the report(s) above.

4.3. Software localisation, website globalisation and language technology tool development

technolangue	2007	Language technologies in Europe: the market and trends - complete study (IN FRENCH)

Some information on this sector is available in the report(s) above.

4.4. Language Teaching

Eurostat	2009	Students in ISCED 1-3 by modern foreign language studied

Students in ISCED 3 by modern foreign language studied

Year:	2006
French:	266,582
German:	100,006
Spanish:	59,990
Total:	426,578

Figure 162 – Source: (Eurostat, 2009a)

Eurostat	2009	Students in ISCED 1-3 by number of modern foreign languages studied

Students in ISCED 3 by number of modern foreign languages studied

Year:	2006
Zero:	364,600
One:	351,900
Two:	46,300
Three:	2,200
Four or more:	0

Figure 163 – Source: (Eurostat, 2009b)

Butašová et al	2007	Conception of Teaching Foreign Languages at Primary Schools and Secondary Schools
Whitby et al.	2008	Language Learning Provision at Key stage 2: findings from the 2007 survey

At first and second level of compulsory school the teaching of foreign languages is facultative. Foreign language teaching is compulsory as of the 3rd grade of compulsory school attendance, i.e. from age 11. Schools have to offer pupils in their 3rd level of education one or more official working languages of the European Union, i.e French, German, Spanish, Italian, Finnish, Danish, Dutch, modern Greek, Portuguese or Swedish (Butašová et al, 2007, p. 40).

There are a number of positive developments in the progress being made by primary schools in implementing the National Languages Strategy:

- 84% of schools are offering pupils in KS2 the opportunity to learn a language within class time. This is a rise of 14 percentage points compared to 2006;
- 54% of schools are fully meeting the entitlement for all year groups. This is a rise of 20 percentage points compared to 2006;

- 86% of schools are confident that current arrangements for language teaching at KS2 are sustainable into the future. This is a rise of eight percentage points from 2006. (Whitby et al., 2008, p. 1);
- The most popular language by far was French, which is offered by 89% of the schools. Spanish and German remained popular languages for schools to offer (23% and 9% respectively), and a small number (less than 3%) offered Italian, Chinese, Japanese or Urdu (Whitby et al., 2008, p. 2).

CILT - National Centre for Languages	2007	Enrolments trends over past 5 years by language

The following tables show the enrolment trends in UK higher education (first degrees, other undergraduate degrees and postgraduate degrees) over the past five year by foreign language studies.

	2002/3	2003/4	2004/5	2005/6	2006/7	Average %change
Celtic studies	985	930	915	950	935	**-5.1%**
French	8 265	7 820	7 665	7 725	7 760	**-6.1%**
German	3 330	3 200	3 075	2 970	2 985	**-10.4%**
Italian	1 670	1 575	1 505	1 420	1 360	**-18.6%**
Spanish	4 510	4 475	4 630	4 725	4 840	**+7.3%**
Portuguese	295	305	310	325	335	**+13.6%**
Scandinavian studies	145	145	155	135	120	**-17.2%**
Russian & Eastern European studies	950	920	935	920	910	**-4.2%**
Other European languages (R9+R0)	5 980	5 055	4 780	4 885	4 710	**-21.2%**

Figure 164 – First degrees. Source: (CILT, 2007, p. 1)

	2002/3	2003/4	2004/5	2005/6	2006/7	Average %change
Celtic studies	2 025	2 740	2 915	2 980	2 415	**+19.3%**
French	4 405	4 150	4 175	4 505	3 860	**-12.4%**
German	1 555	1 465	1 475	1 605	1 935	**+24.4%**
Italian	1 910	2 035	2 145	2 350	2 035	**+6.5%**
Spanish	3 325	3 500	3 700	4 645	4 405	**+32.5%**
Portuguese	210	245	225	360	310	**+47.6%**
Scandinavian studies	445	405	340	490	325	**-27.0%**
Russian & Eastern European studies	585	710	790	1 000	860	**+47.0%**
Other European languages (R9+R0)	5 650	4 780	3 910	3 805	4 390	**-22.3%**

Figure 165 – Other undergraduate degrees. Source: (CILT, 2007, p. 2)

	2002/3	2003/4	2004/5	2005/6	2006/7	Average %change
Celtic studies	300	325	295	285	290	**-3.3%**

French	500	485	420	385	420	**-16.0%**
German	345	310	315	280	280	**-18.8%**
Italian	170	170	155	165	195	**+14.7%**
Spanish	305	270	290	300	360	**+18.0%**
Portuguese	25	35	25	25	30	**+20.0%**
Scandinavian studies	20	15	20	20	15	**-25.0%**
Russian & Eastern European studies	300	330	295	305	390	**+30.0%**
Other European languages	1 415	1 520	1 685	1 670	1 555	**+9.9%**

Figure 166 - Postgraduate degrees (taught and research). Source: (CILT, 2007, p. 2)

The figures above show that French is the most popular language, closely followed by other European languages, Spanish and German.

When analysing the average growth (or decrease) of number of students per foreign language, the largest growth is registered for Portuguese (+27% change on average across the three degrees) and Russian & Eastern European studies (with an average percentage change of +24% across the three degrees).

On the other hand of the scale, Scandinavian studies have experienced a strong decline (-23% change on average across the three degrees), closely followed by French with -11.5% average change across the three degrees.

CILT - National Centre for Languages	2007	GCSE language entries trend analysis, all schools in England
Eurydice	2005	Content and language integrated learning (CLIL) at school in Europe - United Kingdom, Scotland
Eurydice	2005	Content and language integrated... - United Kingdom,England,Wales and Northern Ireland
King	2004	The National Languages Strategy, the story so far
Slattery S	2004	Multilingual Britain: implications for MFL teaching in secondary school

Some additional information on language teaching in the United Kingdom is available in the reports above.

4.5. Conference Organisation

No publications referring specifically to this sector could be retrieved for the United Kingdom.

4.6. Consultancy

No publications referring specifically to this sector could be retrieved for the United Kingdom.

5. Questionnaire

5.1. Statistics on respondents from the United Kingdom for each target group

The number of respondents for this country over the total number of valid responses to the questionnaire (1152) is listed below.

Total number of respondents based in United Kingdom:	**77/1152**
Individuals and small enterprises:	67/77
Language service providers:	7/77
Language service departments:	3/77

6. Estimate of volume and value of language market

Based on the figures provided by the authorities, the estimated value of the translation and interpreting market in the United Kingdom ranges between **290 million € and 434 million €**. However, no estimate can be made concerning the volume of the market.

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