



ELIS 2021 - EUROPEAN LANGUAGE INDUSTRY SURVEY

POWERED BY ELIA | EMT | EUATC | FIT EUROPE | GALA | LIND | WOMEN IN LOCALIZATION



ELIS 2021: Tech - Tools – Initial Findings and Outlook



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ELIS 2021 - 9th edition

What: Initiated in 2013 by EUATC, the European federation of national associations of translation companies.

Who organises it: Run in partnership with ELIA, FIT Europe, GALA, the EMT university network, the European Commission's LIND group, and - since this year - Women in Localization.

Who participates in it: Open to Language service companies, independent language professionals, training and language technology providers, language service buyers, private and public translation departments.





ELIS 2021 - 9th edition

2021: 907 responses

172 language service companies

575 independent language professionals

105 representatives of training institutions

44 language departments and language service buyers

11 language technology providers

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





ELIS 2021 – What we look at



Language Service Companies

Tech acquisition
Actual v planned

Changes in tech usage

Developments

Rise of MT

Emerging trends – RSI / AI

Independent Language Professionals

Tech usage
Planned investments

Tech-related stress

Tech-related training

Rise of MT

Emerging trends – RSI / AI

LSCs

MT the strongest technology trend, but CAT still going strong

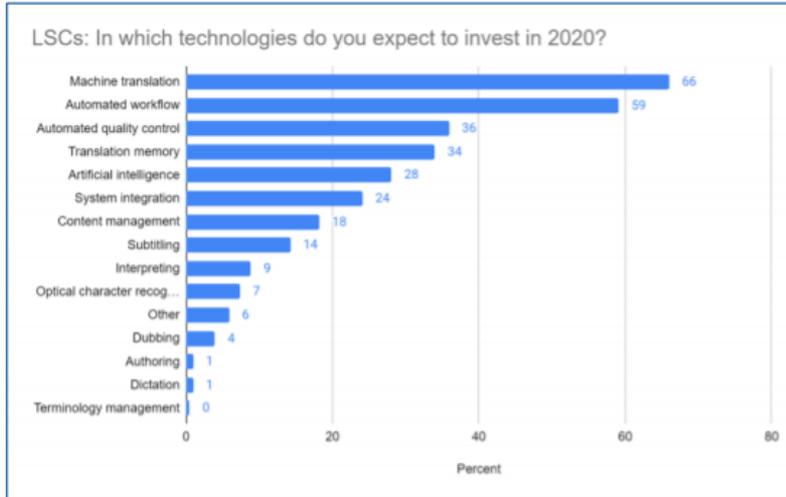
Workflow technology is high on the agenda among translation companies

Automated QA getting more attention

Independent professionals mainly focused on CAT technology

Automated Interpreting and Audio/Video solutions still far behind

Technology wish-list strongly depends on respondent type



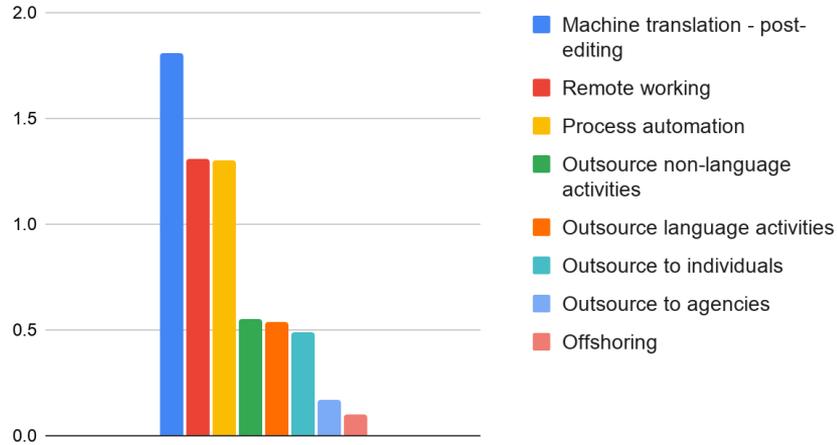
In 2020, LSCs respondents invested most heavily in remote interpreting systems (15%) and machine translation (9%).

In 2021, focus will apparently be on project management related automation such as project administration, followup, workflow and reporting.

Among the improvement requests for translation management systems (74% of the respondents answered that question and therefore indicate that they are using some sort of TMS), CAT/MT interaction and quality management features are top of the bill.

Operational changes

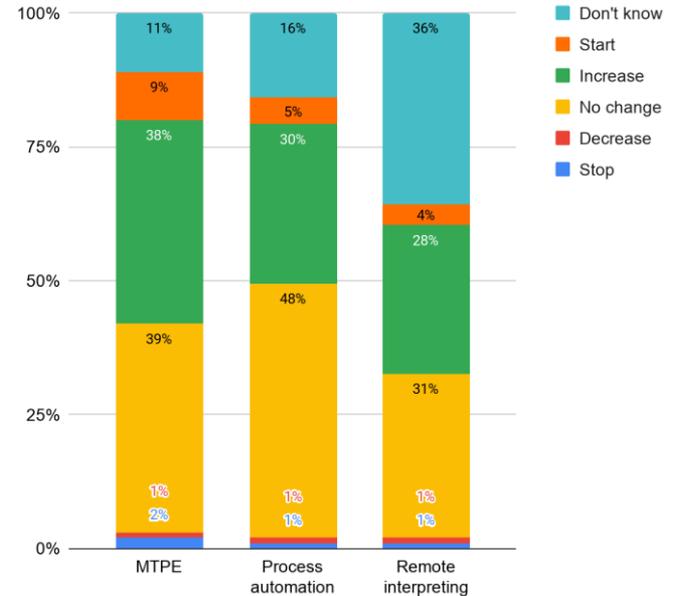
Operational changes



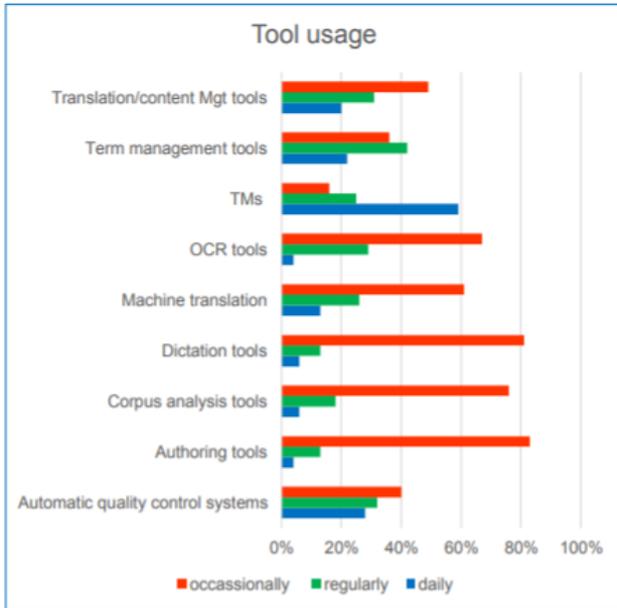
Average of score: Start = 5, Considerably increase = 2, Increase = 1, Decrease = -1, Considerably decrease = -2, Stop = -5

The Increase & Start categories cover all freelance respondents that work as interpreter (approx. 30%).

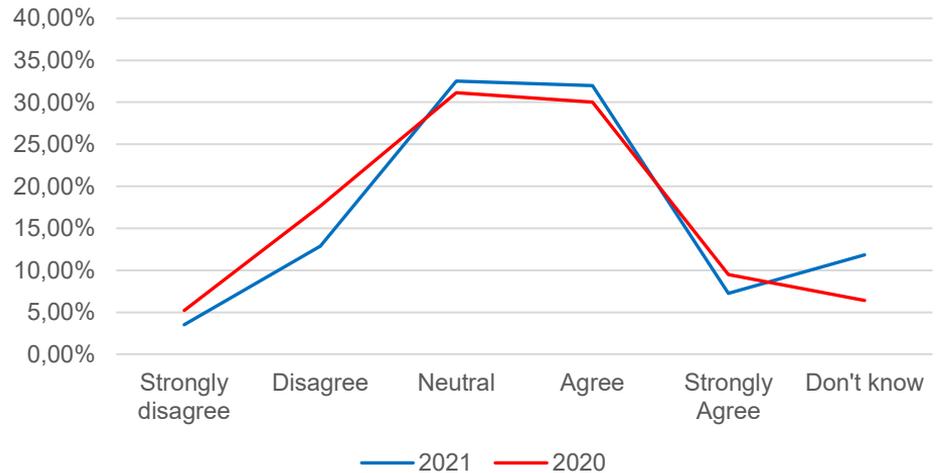
Independent professionals



Independent Professionals



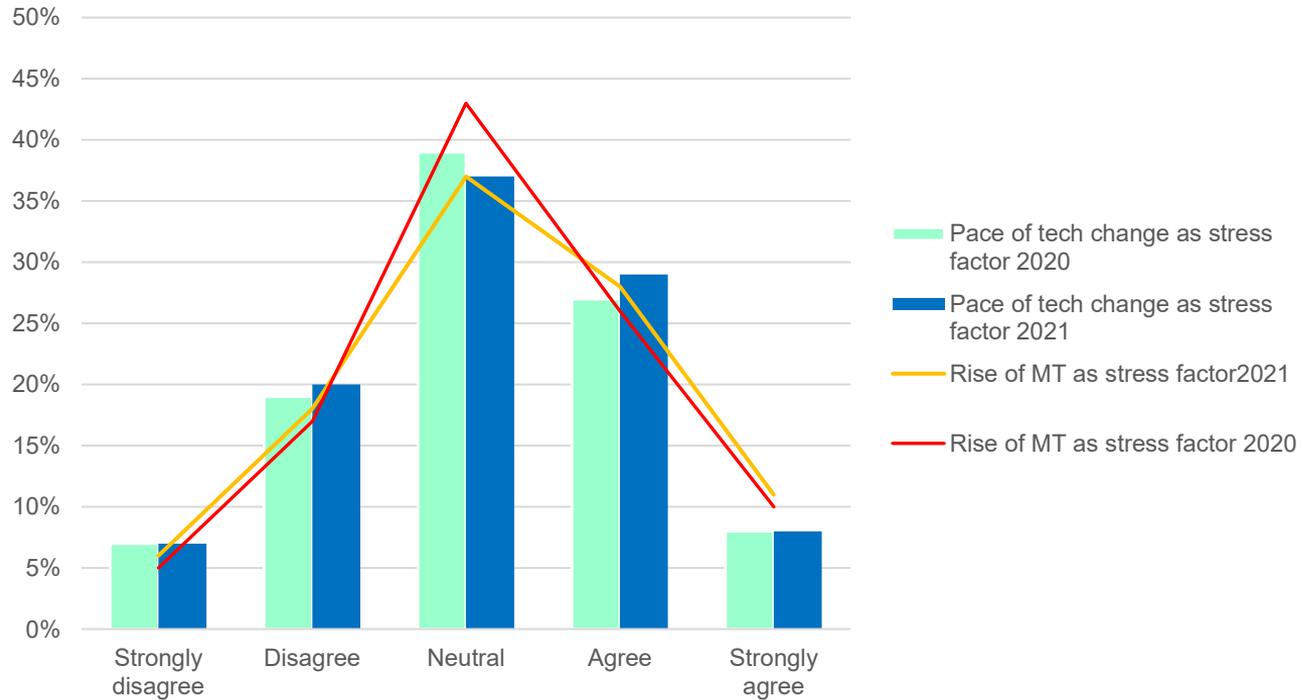
Tech training sufficient to allow me to compete



CAT tools continue to dominate – MT usage on the rise - Major scope for tech providers to offer better training

Independent Professionals

Tech as a stress factor



Industry mood and Outlook – only part of the picture

	Companies	Investment	Disinvestment	2018	2019	2020	2021
Austria	16	9	4	0.67	1.3	0.7	0.3
Belgium	9	6	0	0.62	0.57	0.8	0.7
Bulgaria	6	4	2				0.3
Czech Republic	6	6	0	1.4	1.2	0.5	1
Denmark	2	1	0	0	1	1	0.5
Estonia	7	8	0	0.67	0.8	0.8	1.1
Finland	2	3	0	1	0.57	2	1.5
France	5	2	2	1.1	0.53	0.7	0
Germany	12	10	5	0.8	0.89	1.6	0.4
Greece	2	2	0	0.7	1.2	0.7	1
Hungary	8	2	2	1	0.88	0.7	0
Italy	8	8	0	0.91	0.76	1.3	1
Latvia	4	2	0	1.17	2	0.7	0.5
Lithuania	5	6	0		0.71	0.8	1.2
Netherlands	9	8	0	1.27	1.42	1	0.9
Poland	3	2	2	1	0.8	0.4	0
Portugal	9	6	0	0.92	1.18	1	0.7
Romania	5	6	0	0.71	0.43	1	1.2
Russia	5	5	2				0.6
Serbia	1	0	0	0.86	0	1.5	0
Slovakia	1	1	0	0.6	0.67	1	1
Slovenia	6	3	2	1.36	1.44	0.9	0.2
Spain	14	3	2	0.76	0.56	0.7	0.1
Sweden	2	0	0	1	0.67	1.7	0
Ukraine	1	2	0				2
United Kingdom	13	10	0	0.53	1.1	0.8	0.8
				0.9	0.9	1.0	0.6

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

Score 0 = as many investment as disinvestment intentions

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

Significant number of countries below threshold (results less reliable)

Global industry mood deteriorated compared to previous years



Main event

Preliminary results

Overall survey findings to be presented at online event on 15 April

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for more details about how to register and attend

Thank you!