ASTT-Tagung 2022

Trends und Entwicklungen in der Sprachindustrie

30. Juni 2022

Florian Faes, Geschäftsführer, Slator AG

- **Eine Wachstumsbranche**

- **Regionale Verteilung**

- **Die Käufersicht**

- **2022 Language Service Provider Index**

- **Bei Investoren beliebt**

- **Aktuelle Lage auf dem Arbeitsmarkt**

- **PEMÜ - gekommen um zu bleiben**

- **Mögliche Preismodelle für PEMÜ**

- **DeepL**

- **Expert-in-the-Loop: Gestern, Heute, Morgen**

- **Karrierechancen**

- **Neue Märkte**

Agenda

Research & Analyse

News, Podcast

- Newsletter mit 15,000 Abonnenten
- Tägliche Berichterstattung
- SlatorPod
- LocJobs

Beratung

- M&A
- Commercial Due Diligence
- Custom Research
- RFP Beratung
- Strategieberatung

Insights & Daten

- LSP Index
- Investoren-Datenbank
- Jobs Index
- RFP Center

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Projected Growth to 2026
Language services and technology industry projected growth (in USD bn) to year-end 2026 based on conservative, base, and optimistic growth scenarios
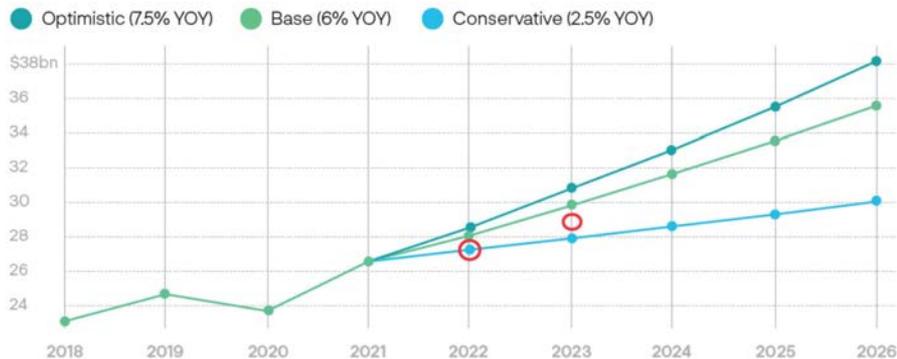
Extrem starker Anstieg der Nachfrage nach vielsprachigen Inhalten generell

- Alle Techgiganten forschen an Sprachtechnologie
- DeepL unter den Top 150 meistbesuchten Websites weltweit
- Neue Technologien ermöglichen zahlreiche weitere Anwendungen vielsprachig anzubieten
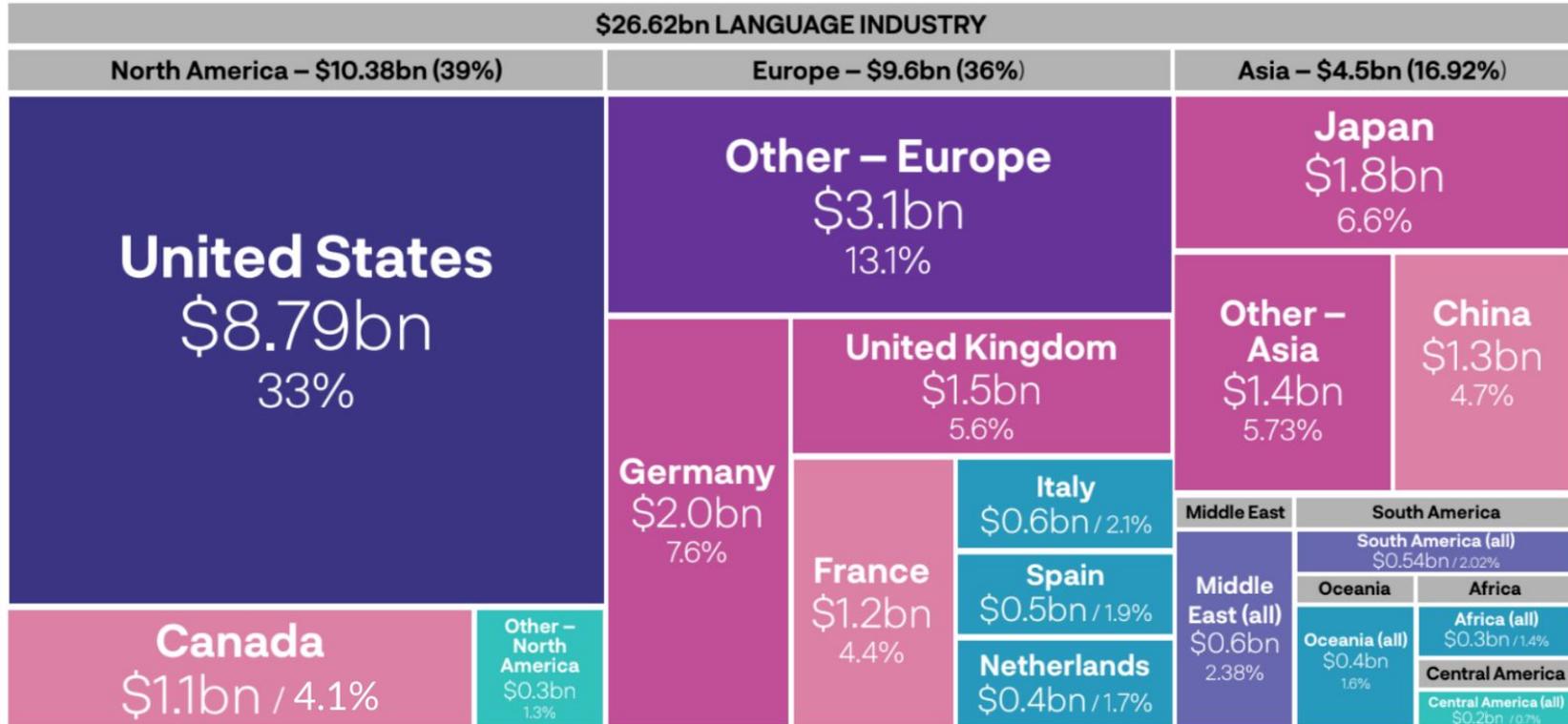
5-8% jährliches Wachstum für Expert-in-the-Loop Übersetzung

- Neue Märkte wie Gaming und Streaming eröffnen neue Berufschancen
- Besser MÜ-Qualität führt u.a. Treibt auch Nachfrage nach Expert-in-the-Loop Übersetzung

Language Industry Market Size per Region

Per geographic region in 2021, including top 10 countries by percentage and USD

$26.62bn LANGUAGE INDUSTRY

North America – $10.38bn (39%) | Europe – $9.6bn (36%) | Asia – $4.5bn (16.92%)

United States $8.79bn 33%

Canada $1.1bn / 4.1%

Other – North America $0.3bn 1.3%

Other – Europe $3.1bn 13.1%

Germany $2.0bn 7.6%

United Kingdom $1.5bn 5.6%

France $1.2bn 4.4%

Italy $0.6bn / 2.1%

Spain $0.5bn / 1.9%

Netherlands $0.4bn / 1.7%

Japan $1.8bn 6.6%

Other – Asia $1.4bn 5.73%

China $1.3bn 4.7%

Middle East

Middle East (all) $0.6bn 2.38%

South America

South America (all) $0.54bn / 2.02%

Oceania

Oceania (all) $0.4bn 1.6%

Africa

Africa (all) $0.3bn / 1.4%

Central America

Central America (all) $0.2bn / 0.7%

Source: Slator

Wieso Übersetzung und Lokalisierung eingekauft wird

Slator "Buyer Intention Framework". In Mrd. US-Dollar

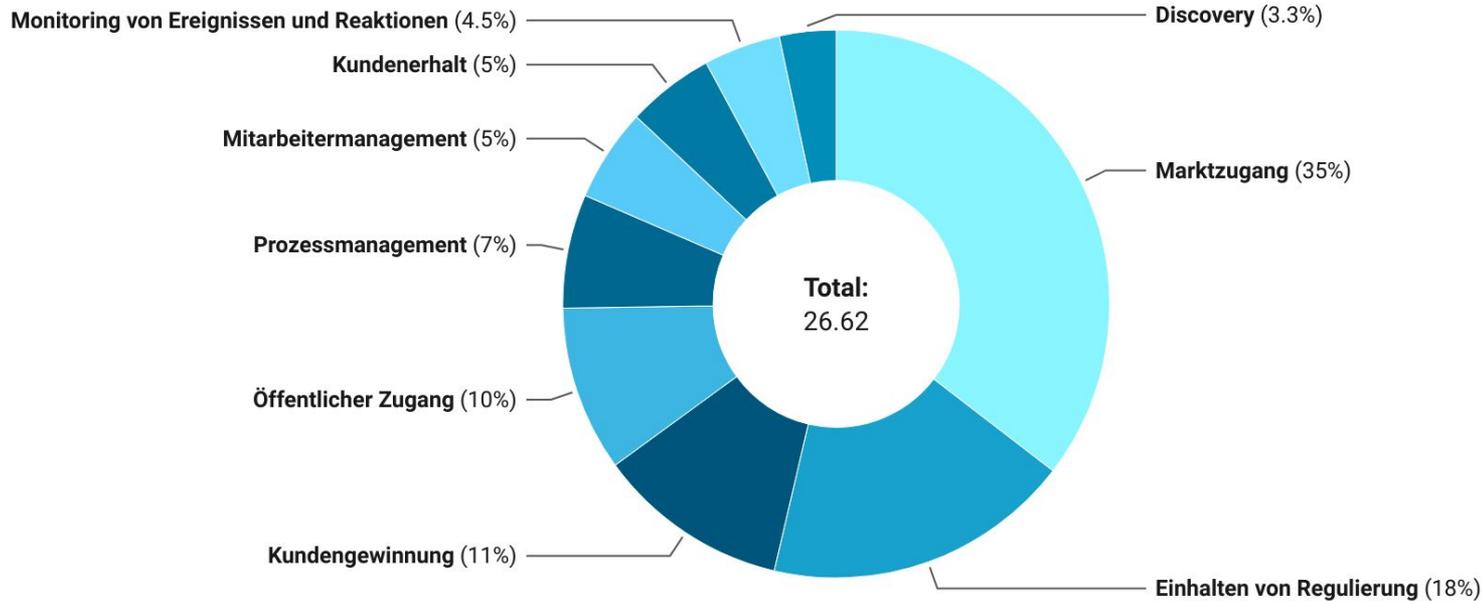Monitoring von Ereignissen und Reaktionen (4.5%)

Kundenerhalt (5%)

Mitarbeitermanagement (5%)

Prozessmanagement (7%)

Öffentlicher Zugang (10%)

Kundengewinnung (11%)

Discovery (3.3%)

Marktzugang (35%)

Total:
26.62

Einhalten von Regulierung (18%)

Chart: Slator • Source: Slator 2021 Language Industry Market Report • Created with Datawrapper

Rekordhohe Teilnahme

- 300 LSPs sind inzwischen im Slator Language Service Provider Index (LSPI)
- 5 Super Agencies, 55 Leaders, 49 Challengers, 186 Boutiques

LSPI repräsentiert bereits 9,5 Mrd. US-Dollar Umsatz

- Die im LSPI vertretenen Firmen machen 1/3 der Branche aus

Die Großen werden größer

- Wachstum bei Super Agencies lag bei 33%, bei den Leadern bei 18%, den Challenger be 14%, und den Boutiquen bei 16%
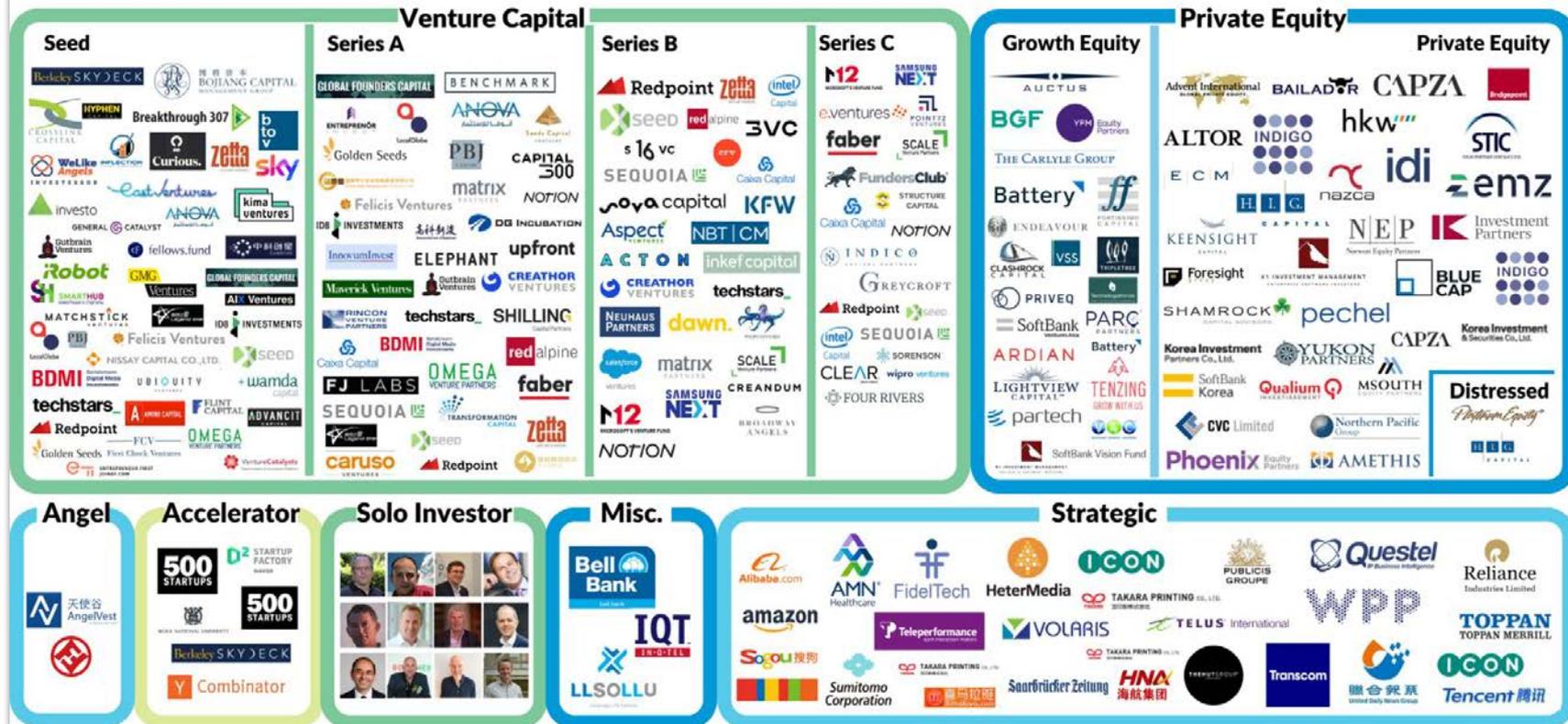
Durchschnitt und Median

- 32m Mio. US-Dollar 👉 **durchschnittlicher** Umsatz der LSPs 2021
- 4.6m US-Dollar 👉 **Median** LSP revenue 2021
- Der durchschnittliche LSP beschäftigt 137 Mitarbeiter

Super Agencies

TransPerfect	United States	1
RWS	United Kingdom	2
Lionbridge	United States	5
Welocalize Inc.	United States	7
Acolad group	France	8

Slator Language Industry Investor Map

Slator Language Industry Investor Map

- Over 300 transactions
- 2015 to April 2022

Slator Language Industry Job Index — Erste Zeichen der Schwäche

Per Juni 2022

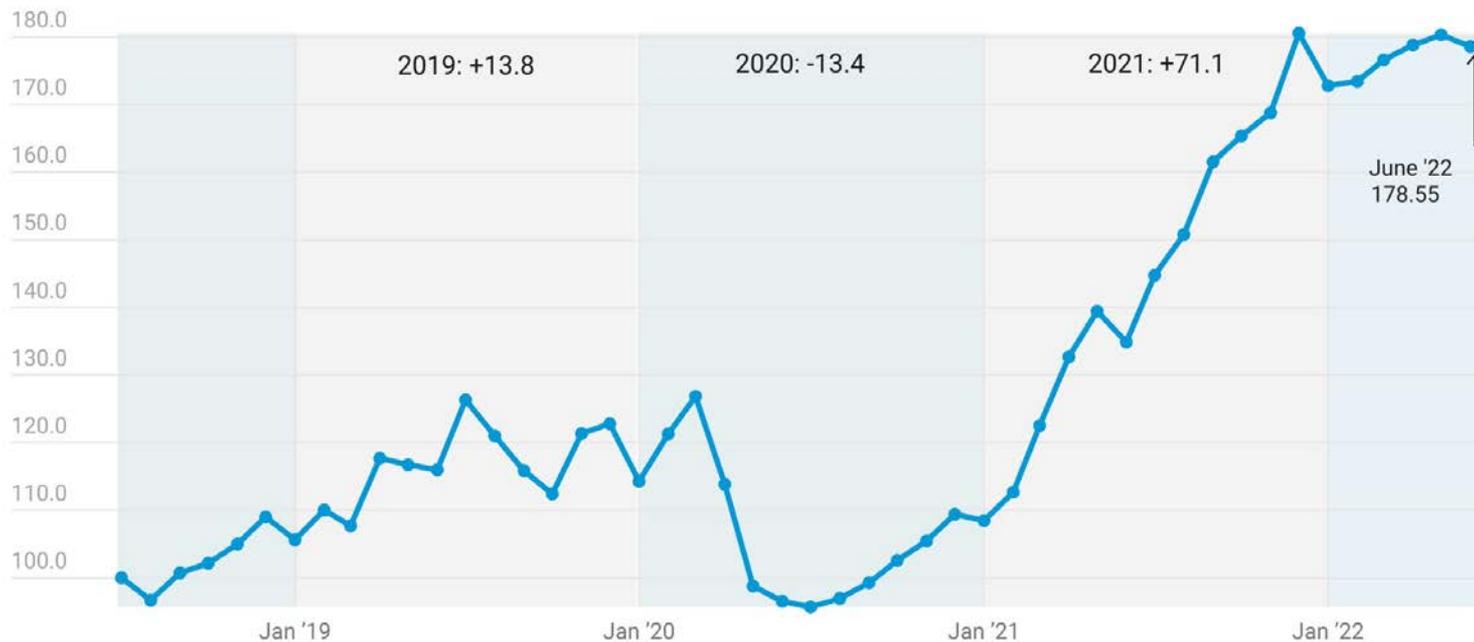2019: +13.8   2020: -13.4   2021: +71.1

June '22
178.55

Chart: Slator • Source: Slator • Created with Datawrapper
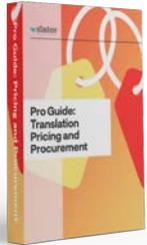
Data from Memsource show that 2020 was the first year when <u>post-editing machine translation became the dominant</u> translation method.
(Januar 2021)

We are expecting translators to <u>be able to post-edit</u>. We are expecting translators to be able to [depart from] the source [and to have] cultural adaptation, research capabilities [and] feel confident to be in a dialogue with the client.
(May 2022)

I would guess that <u>75% of all [our] translation work</u> is going through some sort of PEMT process
(Juni 2022)

MT-enabled Pricing Models for Translators

	TYPE	DESCRIPTION
Standardized pricing — Aims to generalize translator rates across all MTPE tasks	Discounted per-word rate	MT-generated segments are paid in the same way as fuzzy matches; e.g., at roughly 50–60% of a translator's standard per-word rate.
	Per-hour editing rate	Post-editing is paid to linguists per hour at the linguists' hourly rate. An expected throughput is defined in advance, typically around 1,000–1,200 words.
Variable pricing based on quality or effort evaluation. — Aims to account for variations in MT output quality. Variable models tend to combine and take into account **multiple** factors.	Human evaluation	Linguists review the quality of MT output and negotiate a per-project, per-word rate or hourly editing rate with the LSP.
	Automated evaluation	An analysis is performed on MT output to gain insight into output quality. AI-powered tools, such as Memsource's Machine Translation Quality Estimation (MTQE), provide a quality score for each segment, allowing weighted discounts to be applied to MT segments, in addition to TM matches. Quality scores are presented alongside segments in the same way as TM match scores.
	Engine evaluation	MT engines (for specific language pairs, domains, and / or customers) are evaluated individually to gauge quality levels. Evaluation may be performed manually or using automated quality evaluation tools. Translators are then paid a percentage of their per-word rate for PEMT based on the engine that is applied. MT Engine analysis must be performed on an ongoing basis to capture incremental quality improvements gained from retraining.
	Edit distance	Edit distance represents the number of edits (and, therefore, the post-editor's effort) required to bring MT output to the required quality level. TMSs such as SDL Trados, XTM, and Memsource have in-built edit distance tools. Post-editors are typically paid a percentage of their per-word rate based on the actual number of changes implemented on TM matches and MT output during the task
	Actual edit time	Many of these tools now have functionalities to generate an edit time report, which can be used to pay post-editors by actual hours spent, regardless of throughput rate. However, in practice, it is rare for actual edit time to be used to calculate payment without reference to any further information.
	Human post-evaluation	LSPs may manually collect information from post-editors on MT output quality and use this to assess MT engine quality and to cross-check and recalibrate rates.

Fixe Preisstruktur

- **Rabatt auf Wordpreise gemäß MÜ-Qualität (analog TM)**
- **Stundenpreis für Editieren (auf Wortbasis)**

Variable Preisstruktur nach Aufwand

- **Projektbezogene Aufwandschätzung (durch Linguist oder automatisiert)**

- **Edit-Distanz**

- **Tatsächlicher Zeitaufwand**

Translators as **decision-makers**

Translators as **creators**

Translators as **world changers**

Translators as **consultants and testers**

Translators in **law**   reutlaw

Translators at the **start of the loop**

Translators as **terminologists**

Translators **transforming literature**

Translators **closing the loop**

Translators as **researchers**

Features · By Anna Wyndham On 22 Oct 2021

10 Areas Where Translators Are (and Will Remain) Essential Experts in the Loop

DeepL

Anzahl Mitarbeiter bei DeepL

Quelle — LinkedIn Profile

Anzahl Mitarbeiter
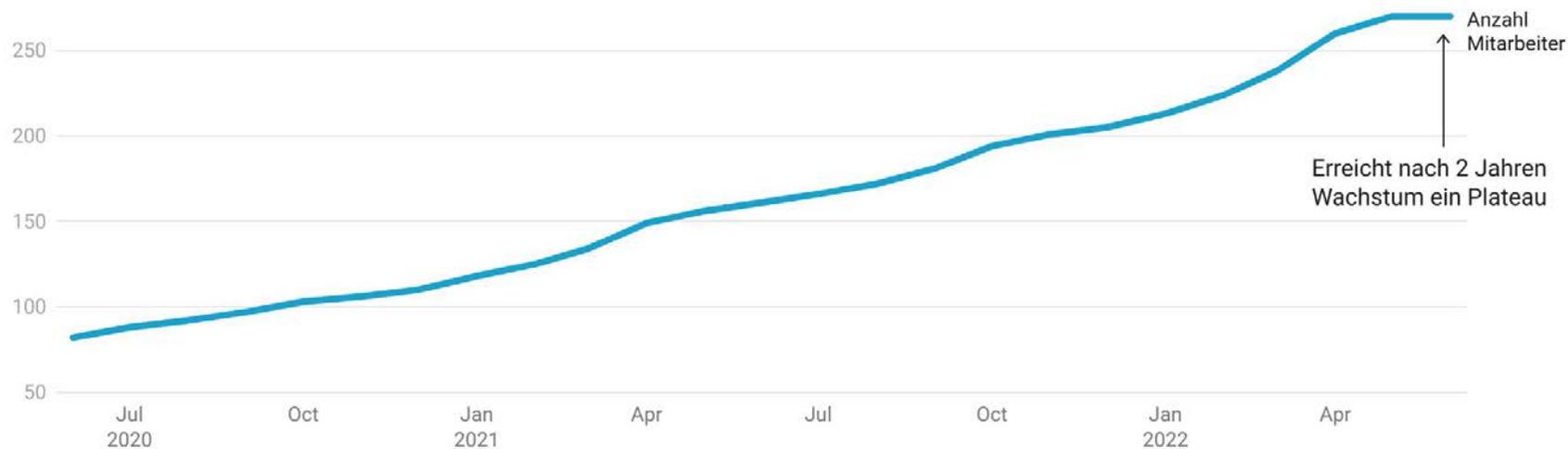
Erreicht nach 2 Jahren Wachstum ein Plateau

Chart: Slator • Source: Slator • Created with Datawrapper

2016 – 2019

- **Abwägen der Chancen und Risiken von PEMT**

- **LSPs testen, wo sich PEMÜ eignet**

- **Preismodelle werden ausgearbeitet**

2020 – 2022

- **Bessere Kalibrierung der PEMÜ Kompetenzen, Ausbildung, Spezialisierungsgrad**

- **Nachfrage nach Fachspezialisten / Post-Editoren steigt**

2023 👉

- **Schließen der "letzten Meile" als Chance und Alleinstellungsmerkmal**

- **Fortschritte bei der Forschung zur Zusammenarbeit von Mensch-Maschine**

- **Spracherkennung und andere Modalitäten setzen sich verstärkt durch (Multi-Modal)**

slator

Für Extrovertierte und Umtriebige

- ### Vertrieb und Business Development

Die Kombination von Fachwissen in Sprache, Technologie und der Industrie des Kunden ist selten. Möglichkeit zum Karrierewechsel.

Für Tüftler

- ### MT Engineer, Post-Editing Berater

Auswahl und Training von MÜ. Finden und erstellen von Trainingscorpora. Bestimmen von Projektaufwand, MÜ-Risikoanalyse. Projektmanagement.

Post-Editors, MT Engineers, PE Consultants — Here Are the Skills You Need

2 Weeks Ago   Machine Translation   · By Maria Stasimioti On March 3, 2022

Post-editors need specific competencies and skills to fulfill the requirements of a post-editing task — and establish post-editing as a profession in its own right. Continue reading

Für geborene Sprachler

- ### Die letzte Meile der Branche

Expert-in-the-Loop, kreatives und hochspezialisiertes Übersetzen

10 Areas Where Translators Are (and Will Remain) Essential Experts in the Loop

5 Months Ago   Features   · By Anna Wyndham On October 22, 2021

Where translators make the difference in mission-critical cases around subtitling, politics, brand marketing, language technology, and more. Continue reading

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Vielen Dank!