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Economic trends and developments in the translation industry: what relevance for translator training?

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Abstract

This paper examines some of the features of the translation services sector, based on economic performance data, industry-specific surveys and developments in the formulation of international standards for translation services. A section of the paper is devoted to each of these aspects. The picture which emerges from the economic data is of a fragmented sector consisting of predominantly freelance translators on the one hand and ever-expanding international companies reaping most of the financial benefits on the other. Industry-specific surveys confirm what we learn from the economic data, and provide us with some additional information about the freelance translator's profile and training needs. An analysis of the new European standard for translation services brings into focus some possible future directions for translation companies and freelancers. In a final section, the paper reflects critically on the relevance of these issues for translator training, using intended learning outcomes as a means of formulating the connections between the current state of the language services industry and the professionalization element in university translator training programmes.

1. Translation as an economic activity

Publications in the area of translation studies do not often discuss translation from the perspective of its economic contribution and significance. This section explores the extent to which information about translation activity is made available by national economic statistics bodies or other sources. It also comments on where translation and interpreting fit into systems for classifying economic activity and it discusses discernible trends in the sector, based on recent statistics on turnover and employment.

1.1. US Economic Census

In the USA it is possible to retrieve data on business activity in translation from the US Economic Census carried out by the US Census Bureau. This census is conducted on the basis of establishments, so companies operating at more than one location will file a separate report for each of those offices.

Translation and interpreting services come under the ‘Professional, Scientific, and Technical Services’ sector in this census. This sector is described as covering businesses carrying out activities which require a high degree of expertise and training, providing services to clients in a variety of industries and sometimes to households. The activities included here are, among others, accounting, architectural design, veterinary, computing, advertising and photographic services.

Table 1 compares data for US translation companies in 1997 with those of 2002 (US Census Bureau 2001a and 2004). Interesting here is the clear trend towards larger companies operating out of numerous locations and occupying an ever-larger market share. In 1997, the top four companies had 12.2% of the total market share but few branches; in 2003 the top four companies had substantially more branches and had doubled their market share. In 1997, the top four companies were employing approximately 14% of the total number of employees; in 2003, they were employing more people, but there were more people working in the sector as a whole, so the percentage employed by the top four companies decreased slightly. The overall picture, therefore, is one where the sector more or less doubled both in terms of revenue and employment rates in those five years. In 2003 the top companies had a larger share of the total revenue but a proportionately smaller share of the employees; to put it another way, 24% of the sector’s revenue is generated by 14% of the employees.

Census year	Total no. of establishments	Revenue (total) (\$1,000)	No. of employees (total)	No. of establishments of top 4 companies	Revenue of top 4 companies as % of total	Employees of top 4 companies
1997	904	414,570	4,863	5	12.2%	715
2002	1,587	900,138	8,390	97	24.0%	1,170

Table 1 Translation in the US Economic Census data from 1997 and 2002 (US Census Bureau 2001a and 2004)

The data in Table 1 relates to companies with employees. There is another source of information in the US Economic Census, namely non-employer statistics, i.e. statistics for businesses that have no employees. Tables 2 and 3 present the number of establishments and revenues in 1997 and in 2002 (US Census Bureau 2001b and 2005). There is a decrease in the overall number of establishments over this period. We can also see a decline in the number of individual proprietorships (unincorporated businesses owned by an individual, including self-employed people, both full-time and part-time), while there is an increase in the number of corporations (legally incorporated businesses) and in partnerships (unincorporated business owned by two or more people with a shared financial interest). Unincorporated businesses owned by

individuals still account for most of the market but, over this five-year period, some of their share has shifted to the corporations and partnerships.

Translation and interpretation services 1997	No. of establishments	% of total	Revenue (\$1,000)	% of total
All establishments	28,014	100	536,301	100
Individual proprietorships	27,697	98.9	517,538	96.5
Corporations	234	0.8	13,639	2.5
Partnerships	83	0.3	5,124	1.0

Table 2 Non-employer statistics for 1997 from the US Economic Census data (US Census Bureau 2001b)

Translation and interpretation services 2002	No. of establishments	% of total	Revenue (\$1,000)	% of total
All establishments	27,289	100	555,860	100
Individual proprietorships	26,589	97.4	507,333	91.3
Corporations	492	1.8	30,599	5.5
Partnerships	208	0.8	17,928	3.2

Table 3 Non-employer statistics for 2002 from the US Economic Census data (US Census Bureau 2005)

The picture which emerges from these statistics is that, firstly, most of the revenue is generated increasingly by larger companies with multiple branches and, secondly, most people who work in the sector do so as individuals on a freelance basis, but with a trend towards forming partnerships and incorporated companies.

1.2 UK and EU classifications

The UK Standard Industrial Classification of Economic Activities (UKSIC) has been in use since 1948 for classifying business establishments according to their economic activity. The current version of this national classification, UKSIC 2003, maps onto the EU classification NACE (Nomenclature statistique des activités économiques dans la Communauté Européenne), of which Rev. 1.1 is the current version. Both UKSIC and NACE Rev 1.1 have the following categories and subcategories seen in Table 4.

74	Other business activities
...	
74.8	Miscellaneous business activities
...	
74.85	Secretarial and translation activities

Table 4 Current categorization of translation activities in UKSIC (2003) and NACE Rev. 1.1 (Office for National Statistics 2002 and Eurostat 2002)

It is interesting to note the difference between the position allocated to translation and interpreting services in the US and the UK. In the US system they form part of specialized, scientific and technical services, while, in the UK and EU they are

currently part of other business activities, then miscellaneous business activities, then secretarial and translation activities. In the UK, ‘translation activities’ and ‘interpreter’ sit alongside ‘envelope stuffing, sealing and mailing service’ and ‘circular addressing’ as well as some more specialized skills such as proofreading, transcription and desktop publishing activities, as can be seen in Table 5.

74.85 Secretarial and translation activities

- 8395 Circular addressing
- 8395 Direct mailing
- 8395 Document copying service
- 8395 Duplicating service
- 8395 Envelope addressing service
- 8395 Envelope stuffing, sealing and mailing service including for advertising
- 9890 Interpreter**
- 8395 Multigraphing
- 8395 Proof reading
- 8395 Reprographic activities (other than printing)
- 8395 Secretarial activities
- 8395 Shorthand writing
- 8395 Transcribing services from tapes, discs, etc.
- 8395 Translation activities**
- 8395 Typing, word processing and desk top publication service

Table 5 Breakdown of category 74.85 in the UK Standard Industrial Classification of Economic Activities, UKSIC (Office for National Statistics 2002)

Unfortunately at both UK and EU levels, the economic indicators reported are generally for 74.8 ‘miscellaneous business activities’ and do not extend to subsections of this category¹.

It can be noted that these traditional classifications do not reflect the changing language industry. Localization, for example, does not figure in any form in the current UKSIC or NACE classifications. However, a revision of NACE (Rev. 2) is underway and in the process of being accepted (Eurostat 2006). This revision introduces a significant change as far as translation and interpreting is concerned, envisaging a new category 74 ‘other professional, scientific and technical activities’ and, within this, 74.3 ‘translation and interpretation activities’. In addition, the new category 58.29 ‘other software publishing’ will include ‘translation or adaptation of non-customized software for a particular market’. It is expected that EU members will implement this new system by 2007 and, for the first time, we can expect national surveys of business activities and services in EU member states to have a category for ‘translation and interpretation’ which is entirely separate from ‘secretarial services’. This should improve access to sector-specific economic data and facilitate comparisons across EU countries. Furthermore, assigning the new category of ‘translation and interpretation’ to ‘other professional, scientific and technical

¹ The UK *Distributive and Services Trades* report, first released for Q3 of 2005, presents turnover data for category 74.8 and no subsets of this category. However, in addition to ‘secretarial and translation activities’, the category 74.8 includes ‘photographic activities’, ‘packaging activities’, ‘call centre activities’ and ‘other business activities’ so this data is not particularly useful if we wish to obtain details about translation activities.

activities' removes translation and interpreting from its previous association with envelope stuffing and direct mailing and places it closer to other professional and technical activities in the domains of photography, design, advertising, legal matters, architecture, scientific research etc.

Although UK statistics on revenue and employment are not detailed enough to provide data for the 'secretarial and translation activities', translation does figure elsewhere in UK economic statistics. The Corporate Services Prices Index (CPSI) was introduced in the UK with the aim of measuring the quarterly movement in the prices of services provided from businesses to other business or government customers. Together with the Retail Price Index and the Producer Price Index, it is compiled by the Office for National Statistics and is used, among other things, to provide a measure of inflation². The current version of the CPSI is calculated by surveying the cost of 32 business services, including 'translation and interpreting services'³. The latest statistics up to and including 2005 (Office for National Statistics 2006: 7) show the year-on-year changes in the cost to business of translation and interpreting services, depicted in Figure 1, and an overall increase of 6.2% in the cost from 2000 to 2005. This compares with an (experimental) change in costs of business services overall from 2000-2005 of 14%, so the cost of translation and interpreting has increased at a considerably slower rate than business services overall.

Figure 1 Year-on-year movement in cost to UK businesses of translation and interpreting services (Office for National Statistics 2006)

The overall CSPI is calculated with weightings for each of the industries to give an overall measure of cost movement. Industries with high weightings and therefore having a bigger impact on the CSPI are freight transport by road, business telecommunications, employment agencies and property rentals. Translation and interpretation services have the lowest weighting of all industries listed (0.05 out of 100), and are therefore highly insignificant in the overall index of business costs.

It is interesting to note that translation and interpreting services were retained when the CPSI calculation was revised in 2000, given their insignificance in the larger picture of business costs. Their position as the least influential of 32 diverse business

² Although it has been in use for a number of years now, the CPSI overall measure is still regarded as experimental and its methodology continues to undergo refinement.

³ The data concerning costs of translation and interpreting services is obtained from 196 separate price quotes collected per quarter for 6 services/products and 10 respondents.

services, however, may be seen to confirm a perception that many UK businesses see translation and interpreting as an area of minimal expenditure.

1.3 Translation activity in France and Germany

The INSEE (Institut national de la statistique et des études économiques) in France publishes statistical reports on economic activities, among other things. The most recent survey available of business services is from the annual business survey, Enquête Annuelle d'Entreprise for 2003, results of which were published in September 2005. It surveyed a sample of approximately 5% of the companies in the 74.85 category 'secretarial and translation services'⁴. Table 6 presents some of the survey's results.

2003 French sector report	Total companies	Total workforce	of which employees	Turnover (in million euros)
74.85	12,858	25,844	15,374	1,666

Table 6 Data for 2003 for all companies categorized as 74.85 in France (Insee 2005)

Germany's federal statistics office, the Statistisches Bundesamt Deutschland, publishes reports on overall turnover, employment figures and data on types of company operating in this sector. These were not given for 74.85 in 2001 but were given in 2003, perhaps indicating increased importance or status of category 74.85 'secretarial and translation services'⁵. This survey (Statistisches Bundesamt Deutschland 2005a) gives data first for companies with a turnover of €17,500 (the threshold above which companies are liable to pay VAT) and then for those within this who have a turnover in excess of €250,000. This data is based on a sample of 14.8% of the sector, and is presented in Tables 7 and 8.

2003 German sector report	Total companies	of which individual proprietorships	Total workforce	of which employees	Average no. of people per company
74.85 Companies with a turnover of over €17,500	9,040	8,205	19,635	10,461	2

Table 7 Data for 2003 for all companies categorized as 74.85 in Germany (Statistisches Bundesamt Deutschland 2005a)

⁴ This category designation in French is 'Secretariat et traduction' (Insee 2005).

⁵ This category's designation in German 'Sekretariats-, Schreib- und Übersetzungsdienste; Copy-Shops' (Statistisches Bundesamt Deutschland 2005a).

2003 German sector report	Total firms	of which individual proprietorships	Work-force	of which employees	% part-timers	% female
74.85 Companies with a turnover of over €250,000	407	160	6,975	6,648	30.7	54.4

Table 8 Data for 2003 for companies categorized as 74.85 in Germany with a turnover in excess of €250,000 (Statistisches Bundesamt Deutschland 2005a)

Comparing the French and German statistics we can see that there are more people involved in this sector in France than in Germany but a similarly high proportion of individually owned businesses with no employees.

The Statistisches Bundesamt Deutschland also produces quarterly reports which document percentage changes in revenue and employment for individual services sectors. They include the 74.85 category 'secretarial and translation services' and are based on a sample of up to 7.5% of the sector. Reports for 2004 and 2005 (Statistisches Bundesamt Deutschland 2005b, 2005c) show year-on-year increases in revenue but small decreases in employment over that period. It must be reiterated that data on category 74.85 is the closest we get to information about translation and interpreting activities but that these surveys also include secretarial activities.

1.4 Towards a more worldwide view of translation activity

An often-cited source of information on the global translation market is a report produced in the USA by Allied Business Intelligence in 1998. It estimated the number of translators then to be 140,000 full-time and 252,000 part-time, and predicted growth from \$7.3 billion in 1998 to between \$8.8 and \$9.6 billion in 2003 (Allied Business Intelligence 1998). A more recent report (Beninatto and DePalma 2005), published by Common Sense Advisory, estimates the worldwide value of the translation market to be \$8.8 billion and predicts that it will rise to \$12 billion by 2010, with an average growth of 7.5 % per year, and with the US holding and continuing to maintain a slight advantage over the European market in terms of market share. According to Beninatto and DePalma (ibid.: 7), the current \$8.8 billion breaks down into \$6 billion in the private market and \$2.6 billion in the public sector.

In the same report Beninatto and DePalma (2005) present the top twenty translation/localization companies worldwide, seen in Table 9. Following its acquisition of Bowne Global Solutions (BGS) in September 2005, Lionbridge is now the biggest. Both Lionbridge and BGS had grown steadily in recent years through acquisitions; Lionbridge has taken over a number of software and testing companies (e.g. Logoport, Mentorix Technologies Inc., eTesting Labs Inc, Data Dimensions Inc.), while Bowne Global Solutions acquired some of its competitors in the translation and localization industry such as Mendez and Berlitz GlobalNET.

By acquiring BGS in a \$193 million deal, Lionbridge attracted attention in the business world and created 'a \$400 million provider with global scale across more than 25 countries and approximately 500 customers' (Lionbridge 2005). Another

important acquisition, completed in July 2005, was SDL's takeover of Trados, making SDL the third-largest company in the sector, according to Beninatto and DePalma (2005). Acquisitions figure throughout the sector; for example, Merrill Corporation bought P.H. Brink International to form Merrill Brink International in 2005, now in 17th position on the rankings list (ibid.). Since Beninatto and DePalma published their report in June 2005, Titan Corporation, then in second place, has been acquired by L-3 Communications to form L-3 Communications Titan Corporation, specializing in intelligence and surveillance systems but also the main provider of translation and language services to the US government.

Rank	Company	HQ country	Revenue in US\$M	Employees	Offices	Status
1	Lionbridge Technologies	US	377.1	4,000	50	Public
2	Titan Corporation	US	285.4	n/a	n/a	Public
3	SDL International	UK	146.0	1,400	36	Public
4	STAR AG	Switzerland	96.0	750	33	Private
5	RWS Group	UK	63.4	350	7	Public
6	SDI Media Group	US	60.3	200	20	Private
7	Xerox Global Services	UK	60.0	200	4	Public
8	Euroscript S.à.r.l.	Luxemburg	54.5	600	9	Private
9	Transperfect/Translations	US	50.2	325	29	Private
10	CLS Communication	Switzerland	36.0	260	11	Private
11	Logos Group	Italy	36.0	150	17	Private
12	LCJ EEIG	German/Italy/ Belgium/Spain	21.6	140	9	Private
13	Thebigword	UK	20.0	122	7	Private
14	Hewlett-Packard ACG	France	20.0	65	6	Public
15	Moravia	Czech Republic	19.0	350	11	Private
16	TOIN	Japan	19.0	105	5	Private
17	Merrill Brink International	US	18.5	120	4	Private
18	VistaTEC	Ireland	18.2	123	3	Private
19	Transware	Ireland	18.0	160	8	Private
20	McNeil Multilingual	US	17.2	105	9	Private

Table 9 Ranking of the top twenty translation companies, June 2005 (Beninatto and DePalma 2005: 6)

1.5 Summary of findings from the economic data

Unlike in the USA, translation and interpreting activities in Europe have been classified with secretarial services up to now. This will change with the new NACE Rev. 2 classification which introduces translation and interpretation activities as a

separate category within the area of professional, scientific and technical activities and will take effect from 2007. This revision should lead to more precise economic indicators for translation and interpreting activities, no longer bound up with secretarial services.

There is a trend towards larger companies taking an ever-larger share of the market. The biggest players in the field continue to grow through strategic acquisitions. As yet, there is no talk of a monopolization of the sector; in spite of the big players getting bigger, there remains a proliferation of individually-owned companies with no employees, many of whom provide freelance services for the sector's giants.

The sector has seen year-on-year growth reflected in national statistics, with global growth predicted to be strong. There is some indication of improvement of status/significance of the activity in economic terms, e.g. through more appropriate listing in NACE Rev. 2 as discussed above. There were also indications, from the UK figures, that costs to business of translation and interpreting services are increasing, but the rate of increase is somewhat lower than the rate of increase of costs of business services generally.

2. Industry-specific surveys

As can be seen above, it is often difficult to gain a clear picture of the sector's activities through national economic statistics, and it may be necessary to turn to industry-specific surveys for more precise information. This section presents a selection of surveys of the translation and interpreting sector in brief, focusing in particular on data related to modes of working, domains of activity, qualifications and perceived training needs, with a view to shedding more light on the profile of the freelance translator, much in evidence in the economic statistics above.

2.1 Report of the Canadian Translation Industry

In 1999 the Canadian Translation Industry Sectoral Committee (CTISC) published its report on the situation of the translation industry in Canada. In addition to presenting a picture of the sector at that time it also hoped to map out future some developments. A survey was carried out, with responses from:

- 283 firms and independent workers
- 225 client businesses
- 13 developers of aids for translation and machine translation systems

It also drew on other data, including interviews with 14 of the main translation companies and 11 university translation departments/schools.

The main findings (CTISC 1999) related to extent of translation activity are seen as an increase in the number of translators from 7,450 in 1985 to 11,790 in 1995. The general picture of the industry is that it is made up of self-employed translators and small firms, thus bearing similarity to the indications for the US, France and Germany discussed above.

Over 35% of translation work in Canada is for the public sector. The status of French and English in Canada means that most translation work (80%) involves this language pair. 81% of translation professionals in Canada hold at least a BA degree and a quarter of these also have a Master's degree. At the time of the survey, the Canadian translation workforce was seen as an ageing one but demand for graduates was expected to be strong in the years which followed⁶.

According to the survey (ibid.), some employers felt that university graduates were not adequately equipped for the profession and that university training was too theoretical. The translation companies cited 'narrow exposure to culture, lack of practical training and difficulty in working independently' (ibid.: 19) as the main shortcomings in graduates starting their professional careers.

2.2. Workforce Research Project in Interpreting and Translation

The Workforce Research Project in Interpreting and Translation ran from 2002 to 2004 in the UK, initiated by the Language National Training Organisation, supported by the Foreign and Commonwealth Office Language Group and carried out by Schellekens Consultancy. The results of the survey were published by CILT, the National Centre for Languages. The project's aims were:

- to map the fields of interpreting and translation;
 - to collect information on strengths and weaknesses;
 - to review development needs;
 - to recommend priorities for action;
 - to provide the basis for workforce development planning which stakeholders can take forward
- (Schellekens 2004a: 1)

The survey received responses from:

- 305 interpreters and translators
- 28 interpreting and translation organizations/agencies
- 22 organizations providing courses and training in translation and/or interpreting.

The survey (Schellekens 2004a and 2004b) found that 90% of the individuals surveyed worked as translators but half of these worked as both translator and interpreter. 52% of those surveyed held a professional interpreting or translation qualification (most commonly diploma, BA, MA). 68% were freelance. Translation/interpreting in the public service represented 13%, considerably lower than in Canada where there is a requirement for government service documents to be published in French and English. In the translation companies surveyed, the bulk of

⁶ Another view of the Canadian translation industry is offered by Bowker's (2004) analysis of a database of job advertisements for translators in Canada. There is considerable agreement between Bowker's and the CTISC's findings regarding the translator's skill set and developments in the industry, with variation principally in relation to the importance of a third language (given more importance by CTISC than in the advertisements) and the need to have experience of using translation technology (crucial according to CTISC, yet something which is not necessarily stipulated by employers but for which Bowker admittedly finds growing demand).

the workforce (76%) was made up of 'ad hoc freelancers'. The age profile was similar to the Canadian context, with most respondents over 40.

As regards training, one of the findings was that translation course provision is based on student supply rather than industry needs. Almost half of the translation organizations felt that their new recruits needed training of various kinds when they started. While this sometimes referred to guidance on company-specific procedures, some employers commented that there was too much focus on academic or literary perspectives in the university training and not enough coverage of commercial translation (Schellekens 2004b: 8). 40% of professionals felt that their needs for continuing professional development were not being met.

2.3 Surveys by professional translator associations

The most recent translator survey available at the time of writing is one which was conducted in 2005 in Germany by the regional professional association, Assoziierte Dolmetscher und Übersetzer in Norddeutschland e.V (ADÜ Nord 2005) with 819 respondents. 93% of respondents were freelance; this high proportion was to be expected since the association's membership is mostly freelance. 67% of those surveyed had a translation qualification and 68% said they pursued continuing professional development in some form (e.g. attendance at seminars). There was a clear trend towards working directly for clients (as opposed to working for agencies) as translators amassed professional experience. Finally, while the respondents report very varied positions with regard to their pre-tax income from translation activities, 20% experienced a drop in profits in the period 2000 to 2003. The author of the survey report is not surprised by this, given that this period was regarded as a very difficult one for German industry (ADÜ Nord 2005: 4).

The UK's Institute of Translation and Interpreting have undertaken Rates and Salaries surveys in 1998 and 2001, providing a wealth of information about the rates of pay for a large range of language combinations, directions and specializations. Its 2001 survey (Aparicio, Benis and Cross 2001) received responses from 518 individuals, most freelance translators. One interesting finding in the data on income and rates is that, while adding languages to one's portfolio did not appear to increase earnings, translators having a single specialization earned an average 17% more than those who did not specialize to this extent, in part due to the higher productivity rates which could be attained by a specialized translator (ibid: 13). Finally, 72.5% of those surveyed in 2001 were over 40 (ibid: 24), showing similarity with the UK and Canadian studies discussed above.

2.4 Summary of findings from industry-specific surveys

These surveys were carried out in different countries and over a 6-year period. The surveys themselves give considerably more detail than was presented here, where I have focused on a few key findings. Most of the translators surveyed work freelance; as mentioned above, this is sometimes a reflection of the nature of the organization carrying out the survey, but the surveys outlined in 2.1 and 2.2 attempted to be industry-wide. Younger age groups are not heavily represented in the sector; the majority of translators are over 40, with sizeable proportions of the population over

50. Most translators are university graduates but often require some kind of on-the-job training. In addition to this, employers and/or translators perceive a need for continuing professional development but are not always able to obtain it.

3. Standards for the translation industry

The third aspect of the translation industry to be considered in this paper is the development of international standards specifically for the translation industry. Standards which specify aspects of terminology work (e.g. *ISO 704 Terminology work – Principles and methods*) have existed for some time, but these do not deal explicitly with translation. The first standard to address translation was that developed by the German standardization body (DIN), the English version of which was entitled *DIN2345 Translation Contracts*⁷. However, this DIN standard has been superseded by a European standard, referred to as *EN 15038: 2006 Translation Services – Service Requirements*. The following section provides an overview of the content of this European standard.

3.1 Purpose and scope of EN 15038:2006

This standard has been produced by the European Committee for Standardization (Comité Européen de Normalisation, CEN). A meeting in mid-2005 discussed several hundred comments on the 2004 draft (prEN 15038) from national bodies comprising translators' associations, associations of translation companies and national standards agencies (Anderson 2005). The final, revised version of the standard was published in April 2006. Once published as a European Standard, the standards bodies of member states can adopt it into its set of national standards. The British and Dutch standards bodies did this immediately, with others likely to follow (some, like the German standards body, DIN, are currently preparing a translation).

The standard aims to 'establish and define the requirements for the provision of quality translation services' (BSI 2006: 4). It offers translation service providers (TSPs) and their clients descriptions and definitions of various elements within the translation process and sets out procedures and requirements for TSPs. In the first section of the standard, 19 definitions are offered for a set of terms which includes 'translate' and 'translator', 'revise' and 'reviser', 'text type convention', 'source language' and 'target language'.

The next section of the standard outlines the requirements of professional competence which translators must meet. Five types of competence are given. Firstly, 'translating competence' refers to the ability 'to translate texts to the required level', where the required level is the level specified in the translation process section of the standard. (ibid.: 7) This competence also includes the ability to assess problems of both text comprehension and text production and to render the target text in accordance with the agreement made between the service provider and the client. The final aspect of this competence is the ability 'to justify the results' (ibid.). 'Linguistic and textual

⁷ There have been similar national standards in Austria (Önorm D1200, Önorm D1201) and Italy (UNI 10574).

competence' is the term used to denote textual comprehension and production as well as knowledge of text-type conventions and the ability to apply this knowledge. 'Research competence, information acquisition and processing' refers to the ability to acquire linguistic and specialized knowledge to understand the source text and produce the target text, as well as ability to use research tools efficiently. 'Cultural competence' refers to the ability to make use of information about the source and target cultures. Finally, 'technical competence' is defined as the ability to and skills to prepare and produce translations, including the use of technical resources. Revisers must have these competences and should also have translation experience in the relevant domain.

The EN 15038: 2006 standard (BSI 2006: 7) recommends that these competences be acquired through one or more of the following:

- formal higher education in translation (recognized degree);
- equivalent qualification in any other subject plus a minimum of two years of documented experience in translating
- at least five years of documented professional experience in translating.

The standard appears to differentiate here between 'documented experience in translating' and 'documented professional experience in translating', but this differentiation is not elucidated. Nor is the manner in which experience may or must be documented.

The standard obliges TSPs to ensure that these professional competences are maintained and updated (but, as discussed below, not necessarily to provide continuing professional development or training). TSPs must ensure availability of various technical and information resources, they must have project management in place for each translation project and quality management commensurate with the size of the service provider. A further section deals with the relationship between the client and the TSP, referring to documented procedures for taking enquiries, assessing feasibility of a translation job, providing quotations, entering into an agreement with the client, invoicing and recording payment, archiving and assurance of client satisfaction.

The procedures in translation services are split into three categories in the standard: managing translation projects, preparation and the translation process (BSI 2006). Project management includes procedures for handling communication with all parties involved, procedures for allocating resources and monitoring quality. Preparation involves logging the job and assigning resources to it, making technical resources available, carrying out any pre-processing (e.g. for use of CAT tools) and ensuring that a source text analysis is done out to anticipate translation problems. The translation process involves translating the text, checking by the translator, revising by a reviser, reviewing by a domain specialist (if specified in the agreement with the client), proofreading (if specified) and a final verification that the product meets the client's specifications before delivery. In translating the text, the translator is obliged to 'transfer the meaning in the source language into the target language in order to produce a text that is in accordance with the rules of the linguistic system of the target language and that meets the instructions received in the project assignment' (BSI 2006: 11).

The translator must check his/her own translation and the TSP is obliged to provide revision of the translation by someone other than the translator. The reviser must have the appropriate source and target language competence and examines the translation for its suitability for purpose. The reviewer, if required, performs a monolingual check for suitability for purpose, through assessment of register and respect for domain-specific conventions.

The standard document (BSI 2006) contains five informative annexes, with guidance on what could constitute project registration details, technical pre-translation processing, source text analysis, style guide and value-added services.

It is interesting to trace the changes which were made to the draft standard, published in 2004, and the final version, made available in 2006. One revision is that the draft standard states that the required competences would be ‘preferably acquired through’ one of the three methods outlined above (translation degree, translation experience or combination of university degree and translation experience), while the final version of the standard uses the formulation ‘should be acquired through one or more’ of those same methods. Although ‘should’ expresses a recommended but not a mandatory requirement – the latter indicated by ‘shall’ in the language of standards – the new formulation is arguably more forceful than the previous one.

There were several changes to the definitions of terms. The terms ‘controlled language’, ‘edit’, ‘localisation’, ‘post-editing’, ‘pre-editing’ and ‘service product’ are all removed from the glossary. New terms added are ‘register’, ‘review’, ‘reviewer’, ‘revise’, ‘reviser’, ‘text type convention’ and ‘translate’. The entries for ‘target document’ and ‘source document’ are replaced by ‘target text’ and ‘source text’ respectively. This seems to indicate a stronger focus on established terms from the field of translation studies than was initially the case.

The most significant change in the standard from draft to final version is on the issue of continuing professional development (CPD). The draft standard states the following:

TSPs shall ensure continuing professional development of all persons involved in the translation process.

For translators and revisers this continuing professional development shall comprise:

- professional competences in accordance with 3.1.2;
- fields of specialisation and specialised languages;
- issues and technologies relating to the profession.

TSPs shall ensure a regular analysis of training needs and shall adequately document activities regarding training and ongoing professional development. (CEN 2004: 7)

This is replaced in the final version of the standard by the single sentence:

The TSP shall ensure that the professional competences required by 3.2.2 are maintained and updated (BSI 2006: 7).

This represents a considerable shrinking of the TSPs' responsibility with regard to CPD, i.e. they are not obliged to analyze training needs and document their training activities. They must ensure that the competences are maintained and updated, but they are not obliged to get involved themselves in this maintenance and updating; responsibility for this may be placed almost entirely on the translator. This revision, in particular, reflects the influence of the organizations which represent translation companies and reveals the reluctance of translation companies to provide CPD.

3.2. Potential impacts of standards on the translation industry

Benefits regarded as potentially accruing from the implementation of standards in the services sector generally include increases in productivity, competitiveness and international compatibility, and reduction of trade barriers (Blind 2003: 13). Standards may also improve transparency and thus boost consumer confidence (ibid.: 14). On the negative side, standards can impede rapid adaptation to consumers' changing needs or preferences and can discourage innovation (ibid.). The increase in competition can also be seen as having undesirable effects, making it difficult or impossible for some companies to survive.

Translation service providers will not be obliged to comply with the new European standard, but as in many areas of service provision, clients may well expect compliance and those companies who do so may gain a competitive edge. One issue discussed in the UK prior to the revision of the draft in 2005 was the requirement for translations to be revised by someone with similar competencies to the translator (Anderson 2005: 108), which essentially requires two translators to be assigned to any one translation job, thus increasing the costs of providing the service and perhaps making compliance difficult for smaller companies. By contrast, the head of the Spanish committee working on the draft standard, Arevalillo Doval (2005) presents the majority view of the formulating committee as one which saw the emphasis on revising as 'one of the principal successes of the standard', and integral to translation quality.

The standard document states that 'conformity assessment and certification based on this standard are envisaged' (BSI: 2006: 4). However, it remains to be seen how compliance will be measured and services providers accredited, and indeed whether the standard gains currency in Europe generally. If so, it is likely to make life more difficult for companies whose practices are shady. Widespread compliance, although inevitably incurring cost and increasing paperwork, may help to destabilize undercutting and to strengthen the sector's professional profile among clients. The financial burden of complying with the standards is likely to be felt more at the level of translation company or agency but translators themselves will also be affected if their agency or company is complying. Arevalillo Doval (2005) also sees the standard as contributing positively towards better working relationships between translation companies and freelancers, since it will require working procedures to be better defined and followed.

Unlike standards which deal with business and administrative processes generally and which some translation companies have achieved in recent years (notably the ISO9000 family of standards), the new European standard is specific to translation activities. However, entitled *Translation Services – Service Requirements*, the standard clearly focuses more on the procedures surrounding the translation activity and the relationship between the client and the translation service provider than on the quality of translations themselves. It should be noted that there is a similar ongoing development in the US, where ASTM Technical Committee F15.48 is in the process of developing a *Consumer-Oriented Guide to Quality Assurance in Translation and Localization* (ASTM International 2005). The American standard appears to take a comparable perspective to its European counterpart, providing a framework for the participants in the translation services agreement.

4. What relevance for translator training?

It is not the aim of this section to review the curricula of universities where translators are trained, although surveys of current training practice could certainly further inform this discussion in an interesting way. Rather, the purpose of this paper is to approach the issue of training from the perspective of the end-product which the market appears to require at the present time. It is thus argued that the analyses of the market, of employment trends, of translator profiles and of developments in standards for translation services are highly relevant for translator training because they can provide input for the translator training curriculum and syllabus. Critical reflection on these aspects of the market enable us formulate learning outcomes, i.e. desirable outcomes of components of a translator training programme which have professional development as their focus. Since these learning outcomes relate specifically to aspects of the above analysis of the industry, they are presented and discussed in two categories below: firstly, translation as an entrepreneurial activity and, secondly, translation as provision of a specialized services.

A further stage in this work would be to discuss the learning and teaching processes which would allow students to achieve the intended learning outcomes and also to specify of how the learning outcomes would be assessed⁸. It is beyond the scope of the article to do this; however, it is envisaged that the collaborative learning approach involving project work on real translation assignments, as advocated by Kiraly (2000, 2005), could provide appropriate means to achieve some of these outcomes. Kiraly's approach is a social constructivist one and is founded on the notion of empowerment. Students, by working on real translation assignments, learn to deal with real-life constraints and experiences: they acquire knowledge and skills; they develop expertise, autonomy and the ability to collaborate; they gain self-confidence and a concept of themselves as budding professionals. Another approach is that offered by González Davies (2004, 2005) who applies the notion of task-based learning to translator training. Here, specific tasks are designed and assigned to students in order to fulfil certain learning objectives and to enable students to practise and acquire specific procedural and declarative knowledge. Kelly (2005) assesses these and other approaches. She argues that Kiraly's approach may be more appropriate for advanced

⁸ See Kelly 2005 for extensive discussion of learning outcomes and curriculum design in translator training.

students and that there may be practical and ethical difficulties in obtaining translation assignments (ibid: 76) but asserts that task-based and what she terms project-based approaches do not have to be seen as opposing paradigms; both can play their part in translator training, perhaps at different stages, corresponding to the different stages in the development of learner autonomy (ibid.: 116).

4.1 Translation as an entrepreneurial activity

The ageing profile of the translator on the one hand and the predicted growth in the sector on the other hand indicate that there are opportunities for translation graduates and that there is and will continue to be a need for their expertise. However, it is also clear that they are unlikely to be employed in-house; the vast majority of them will work freelance and be self-employed. How aware are they of this likelihood? How well does translator training prepare them for this experience? If we take the view that preparation for the world of work is an important aspect of translator training, then trainers need to prepare students specifically for the freelance experience. Initially, even before students enrol on a programme, trainers can make students aware of the likelihood of a freelance career. Indeed, if they do not do this, they run the risk of having graduates who are dissatisfied or disillusioned because they do not find salaried in-house positions, particularly if they have chosen to pursue a postgraduate programme in translation studies to enhance their perceived employability following an undergraduate language programme. Inability to procure a salaried position in translation should not be regarded as an indicator of failure in this sector.

Few would dispute the assertion that some people are better suited to the self-employed status than others. Suitability is, to some extent, linked to skills and abilities; it is possible to learn how to market one's services, how to manage one's time and one's finances etc. However, personalities and personal circumstances can make working freelance a daunting prospect for some and an impossibility for others. On the other hand, there are challenges to be relished, under the right circumstances. Training can help to highlight these, so that working freelance is not seen as a last resort but as a mode of working which offers advantages to those who are suitably prepared. Experiencing the challenges first-hand during their training can provide students with the opportunity to evaluate their suitability for this potential career path and with the necessary self-confidence to pursue it. Kiraly sees the usefulness of 'simulated *practice*' (Kiraly 2004: 1103, his italics) for some kinds of learning but he views 'real *praxis*' (ibid.) as being more valuable in preparing students for the complexities of the profession.

Based on this view of the industry and its needs, the following learning outcomes for a component or components of translator training are proposed.

Translation as entrepreneurial activity

On completion, students should be able to:

- understand the pros and cons of freelance translation work
- show familiarity with the procedures for establishing a freelance business in their chosen country of operation
- evaluate methods for advertising translation services and winning clients
- demonstrate an understanding of how translation companies are structured and operate
- evaluate the technical and other resources required for freelance translation activity
- submit effective and realistic applications, tenders and quotations for translation jobs
- deal with test translations and other selection procedures
- communicate effectively with translation companies and other professional colleagues
- manage their own translation assignments under time constraints

4.2 Translation as provision of specialised services

The issue of whether, and in what form, theory belongs in translator training programmes is frequently addressed in the literature (see, for example, Chesterman and Wagner 2002, Pym 2003, Bartrina 2005, Chesterman 2005, Nord 2005). Findings from surveys, as seen above, show that some translation companies feel that graduates' training has been too academic and not practical enough. This could be seen, not as a criticism of the inclusion of theory in translator training, but rather as a reflection of the lack of sufficient practical experience in some programmes. It can be argued that theory plays an important part in professionalization and in confidence-building for all translators, and perhaps most importantly for the freelancer. As mentioned above, an aspect of 'translating competence', as set out in the European standard EN15038:2006, is the ability to justify decisions taken. Theory and reflection in translator training develops and hones this competence in trainees, enabling them to meet professional international standards with confidence. Indeed, it is difficult to see how the aspect of translation competence which has to do with explaining and justifying choices can be attained without access to conceptual and analytical tools for thinking about and discussing translation, in a range of contexts, for a range of text types etc., i.e. without access to translation theory and theorizing⁹.

While we cannot yet say anything about possible take-up of the new European and American standards for translation services, we can note the emphasis on revision as a vital part of the translation process. Where the standard is adopted, revision will have to be done on all texts, by people who have had the same training as translators. This formalizes the role and competencies of the reviser. Against this backdrop, it makes

⁹ The issue of what constitutes translation competence (or 'translator competence' or 'translating competence') has been discussed by many scholars. Pym (2003) offers an overview of the different approaches. He opts for a 'minimalist' approach whereby translation is seen as 'a process of producing and selecting between hypotheses' and thus as 'a mode of constant theorization' (ibid.: 492); translators develop the ability to generate more than one TT for an ST and then the ability to select confidently and quickly a viable TT from the range generated (ibid.: 489).

sense to integrate revision activities into translator-training programmes, where this has not already taken place (see Mossop 2001).

The links between earning potential, productivity and specialisation can be taken account of in training, with more efforts targeted at helping students to specialize. The traditional distinction in services between standardized and bespoke services is not as relevant or useful in the translation sector as in other service industries. One can argue that there remains a large degree of customization in translation since each client presents a different source text and has different translation needs. However, a degree of standardization is also in evidence when companies can provide instant, online quotes for translation jobs (e.g. SDL's Click2Translate service). Small translation companies cannot benefit from these larger companies' economies of scale and possibly economies of scope, and they may not be able to reduce costs through technology as much as large companies. They might therefore profit more from emphasizing their high knowledge capital and their ability to provide a bespoke product, assuming that clients are willing to pay for a bespoke service.

Relevant in this context is the notion of add-on services. Lionbridge, introduced earlier as the top-ranked translation company in the world, offers product and content globalization. Translation is part of this but it is not offered by Lionbridge in isolation, so to speak, but as part of a content localisation solution. Translation is seen as one element in intercultural communication, and trainees' reflection on this role of translation is likely to make them better able to see the value of offering add-on services.

Based on this view of the industry and its needs, the following learning outcomes for a component or components of translator training are proposed.

Translation as provision of specialized services

On completion, students should be able to

- show familiarity with national/international standards which apply to the provision of translation services
- acquire specialized knowledge required for translation assignments in a specific domain
- evaluate viability of value-added services
- offer one or more value-added services
- check their own translations
- revise translations produced by others
- justify translation decisions and revision decisions
- understand project management and quality management procedures

5. Conclusion

This paper has analyzed a range of economic data from the UK, the USA, France and Germany in order to ascertain how translation activity contributes to those national economies. We have seen the lack of clear status for the translation activity, which is frequently subsumed under more general categories for business services, and there is a dearth of comparable data across economies. Where we have been able to examine

measures in different countries, we have gained a picture of the translation profession as one which is carried out predominantly by freelancers. Their employers on the global scene are increasingly likely to be large, international companies, with a trend towards continued growth of the top companies through mergers and acquisitions. There is also a trend towards formulation of and perhaps eventual compliance with international standards for translation services. While translation companies will hold the certification, the burden of conforming to standards specifications will be experienced directly by translators in all aspects of their work.

Surveys of translators have given us a profile of today's translators in terms of their age, training, expertise and activities and have confirmed some of the findings from the economic data, notably with regard to mode of working. Surveys which include employers of translators have shown us that the typical graduate from translator training delivered at university is not as well equipped for the professional context as might be expected by those employers. The shortcomings are perceived predominantly as a lack of practical experience.

When we bring together what we know about the industry and about present-day translators, the picture for the future is somewhat hopeful: translation is a viable professional activity, in increasing demand worldwide, with room for entrants to the profession in the coming years. However, it is also highly competitive, and year-on-year increases in prices charged and revenue earned appear to be smaller than in some other business services sectors. Being able to promote oneself, maintain high levels of productivity and offer value-added services therefore become paramount. Specialisation is also seen as key to increasing productivity and thus earnings. This snapshot of the industry and the profession is unlikely to surprise many of those involved in it. However, the combination of economic statistics and quantitative and qualitative survey data is novel and it reveals similarities across some North American and European countries. The perspective could be broadened by data from other parts of the world, as they become available.

According to the new European standard, translators will have to gather at least two years of documented experience of translation if they wish to work for a company complying with the standard and if they do not have a higher education qualification in translation. This condition places increased emphasis on translation degrees – undergraduate or postgraduate – as the principal means by which to enter the profession. The responsibility for preparing people for the industry is thus allocated primarily and explicitly to universities, many of whom endeavour, increasingly, to tailor their programme to industry's needs¹⁰. With this in mind, and using market needs and employment trends as a basis, a set of learning outcomes for translator training programmes has been developed. These learning outcomes do not represent

¹⁰ Perhaps this affirmation of the university's role in producing translators could serve as an invitation to funding bodies such as the UK's Arts and Humanities Research Council (AHRC) to re-assess their policy with regard to provision of studentships for postgraduate courses in translation studies. The AHRC provides funding through a scheme entitled Professional Preparation Master's Scheme but excludes 'interpreting and translation courses that are aimed at students wishing to pursue a career in the business and commercial sectors, rather than the arts and humanities' (AHRC 2006: 32), thus apparently only offering the opportunity for funding to would-be literary and film translators – a very small minority of translators in the UK context.

an entire programme but instead relate specifically to preparation for the profession. They are useful precisely because they have been derived from data about and from the industry. They may be used as a starting point in curriculum design to help focus attention on these profession-related aspects which are perhaps neglected in some training programmes. Approaches to learning could be provided by the collaborative approach to authentic translation assignments, as proposed by Kiraly (2000, 2005) and Risku (2002) or the task-based approach (González Davies 2004, 2005) or using a combination of the two. Specifying particular learning, teaching and assessment methods would constitute the next stage in curriculum design and development.

In conclusion, it is argued that the development in students of the knowledge and skills to enable them to enter the profession successfully starts, prior to training, with a realistic understanding of employment prospects. This development proceeds with an awareness of the challenges and rewards of translation as a predominantly freelance profession. It concentrates on translation as a service which is technical and specialized and which encompasses other activities and services in addition to the translation activity *per se*. Finally, it sees the professionalization of the translator as a process which can be firmly rooted in the university translator training programme.

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Note: All online references were last checked for availability on 7 September 2006.

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