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Recent trends in the translation industry in Slovenia

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ABSTRACT

Following two earlier studies, which examined the use of translation tools and the needs of the translation job market, this paper reports on the results of an empirical study into the state of affairs in the Slovene translation industry. A survey of the Slovene translation market was performed to analyse the demand for translation services, how translation businesses are organised and what technology they use. The second part of the paper compares the working environments of ten most successful translation companies. Finally, a custom-built project management system that helps one of the fastest-growing translation companies with its workflow was examined.

KEYWORDS

Translation market, translation companies, translation technology, project management, translators' working environment.

1. Introduction

The translation industry is a fast-growing service sector both in terms of volume and turnover. This is particularly true in Europe, where the need to preserve cultures, and therefore languages, has contributed significantly to its growth. Translation services have also gained importance in a number of industries and companies of all sizes due to an increase in international business, as well as growing sophistication of industrial products, leading to a greater volume of documentation in languages of the target countries (Sager 1993).

The changes in demand have had a major impact on the translation profession, which has become more industrialised. The implications of this process have been addressed by several authors (e.g. Bowker 2002; Fulford and Granell-Zafra 2005; Pym 2003). They all seem to agree that there has been a shift towards large language service providers, full document production and automation. Similar trends are reported by Boucau (2006), who observes that the translation market remains very fragmented, but that large translation companies are quickly gaining in number and size.

Over the past 25 years, the sheer number of languages per project has led to the creation of translation companies whose overall market share currently stands at about 25%. Boucau predicts that this will increase to about 40% over the next decade, as companies use more freelance translators. On the other hand, he claims that the market share of self-employed freelancers working directly with clients will drop from 75% to 60%, the main cause being the growing number of languages requested for each project (Boucau 2006:17).

Another interesting recent phenomenon is outsourcing translation work to low-cost countries (Eastern Europe, Argentina, China etc.). As a result, companies in high-cost countries face the challenge of having to offer competitive pricing. In a world of tougher competition and lower margins, the need for operational efficiency becomes crucial. Fountoukidis (2006) believes that translation companies providing well-organised, efficient processes and experienced staff at the lowest possible price will prevail.

Earlier studies of the translation industry in Slovenia have shown that its major players have recognised the need for and advantages of integrating CAT tools into their workflow (Fišer and Vintar 2004), and that requirements for language professionals wanting to enter the job market have changed accordingly (Fišer 2005). As for characteristics of the translation industry as a whole, they have remained largely unexplored. Some related preliminary work was done by Omerza (1997), who looked into the working world of freelance translators, their business and educational needs during the first years after Slovenia gained independence. But since then the situation has changed. This paper aims to close the gap by exploring how recent social, economic and political changes in Slovenia have influenced the translation industry and how recent trends in the Slovene translation market fit into the big picture of the present-day translation industry.

This paper is organised as follows: the next section presents the results of the translation market survey. Section 3 takes a closer look at the working environments in ten of the most successful translation companies in Slovenia. In Section 4, a project management system of one of Slovenia's most successful translation companies is presented, and the paper ends with some conclusions and the outlook for the future.

2. A survey of the Slovene translation market

The present survey takes a closer look at the translation market in Slovenia, to see to what extent global trends have influenced and changed the Slovene translation service sector. In particular, I was interested in the demand for translation services, who the main providers were and how the translation industry in Slovenia was organised. The survey draws mainly from the Slovenian Business Register, a public database of all business entities in Slovenia, maintained by the Agency of the Republic of Slovenia for Public Legal Records and Related Services.

2.1. Type of organisation

All business entities which list Translation (K74.851) as their main activity were extracted from the register. As seen in Table 1 below, there are currently 481 registered business entities that provide translation services in Slovenia. By far the most common type of organisation is sole proprietor (75.5%), followed by limited liability company (15.6%). The remaining types are rare (8.9% in total).

It must be noted here that there are in fact more than five court interpreters in Slovenia as the register suggests, though for legal and administrative reasons most of them are not registered as such but rather as sole proprietors. Furthermore, the registered freelance artist status is reserved for literary translators who normally do not compete for technical, legal or economic translations on a full-time basis, and will therefore not be discussed further in this paper. The status of miscellaneous 'natural person' is a remnant from past employment systems which allowed translators to hold regular jobs and provide translation services on the side, on a temporary or part-time basis. Because of changes in legislation, this type of business entity has now largely been replaced by sole proprietorship, and has therefore been excluded from the survey.

Type of business entity	**no.**	**%**
Sole proprietor	389	76.3%
Limited liability company	75	14.7%
Freelance artist	20	3.9%
Unlimited company	9	1.8%
Limited partnership	6	1.2%
Court translator/interpreter	7	1.3%
Institute	2	0.4%
Miscellaneous natural person	2	0.4%
Total	510	100%

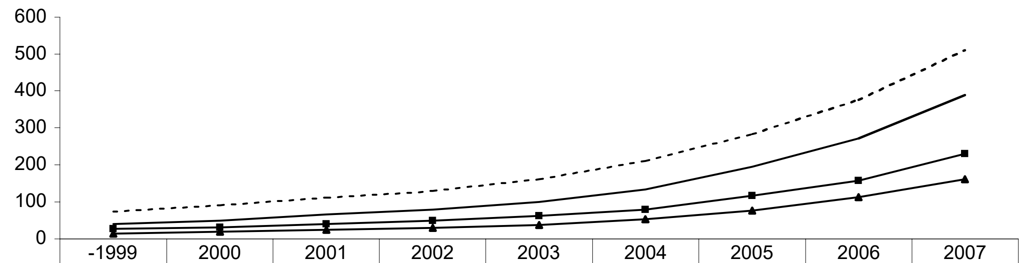
Table 1: Types of translation businesses

2.2. Year of establishment

The first translation companies were established in 1990 and 1991, when Slovenia became independent. There was a steady growth of newly founded translation companies until 2003, just before Slovenia acceded to the EU, at which point the number started to show a dramatic rise. There are several reasons for this: on the one hand, there were fewer employment opportunities for translators in large (multinational) companies; on the other hand, changes in legislation made it easier for translators to start their own businesses.

But the crucial factor was the unprecedented need for professional translations of EU-related documents, which exceeded the capacity of the Government Office for European Affairs (GOEA) translation service and were therefore outsourced through public tenders to freelance translators or translation companies. According to GOEA data, some 80,000 to 100,000 pages of the Official Journal of the European Union have been translated so far, while about 15% of the legislation is still in an ongoing process of translation.

The number of translation companies keeps growing; figures for 2007 exceed the number of businesses that were started in any of the previous years. The most significant increase has been in the number of sole proprietors (see Figure 1). While it is true that most sole proprietors are registered in the capital, Ljubljana, there has been a significant rise in the number of sole proprietors starting their businesses in other Slovene regions in recent years. Recent advances in IT, better Internet connection and decentralisation of the language services sector in Slovenia have made telecommuting feasible and translators' lives more flexible.



	-1999	2000	2001	2002	2003	2004	2005	2006	2007
sp Ljubljana	14	19	25	30	38	53	77	114	160
sp other	27	31	41	49	63	80	118	157	229
sp total	41	50	66	79	101	133	195	271	389
all companies	74	91	112	129	161	210	283	376	510

Figure 1: Establishment of translation businesses

2.3. Start-up capital

Very few businesses were started with mixed or foreign capital, which means that not many large international language service providers have set up their local branch offices in Slovenia. The exceptions are SDL, Skrivanek and Star. Skrivanek and Star are among top 10 companies in terms of their market share in Slovenia, while SDL and Skrivanek have also been ranked among top 20 translation companies in the world (Beninatto and DePalma 2006). Despite the fact that they are still rare, this finding shows that large international companies are important players in the Slovene translation market. Most other businesses were started by foreigners who have moved to Slovenia and work here as translators and language teachers. Although it might be interesting to know more about the origin of these individuals, the database used in the survey lacks such information.

2.4. Number of employees

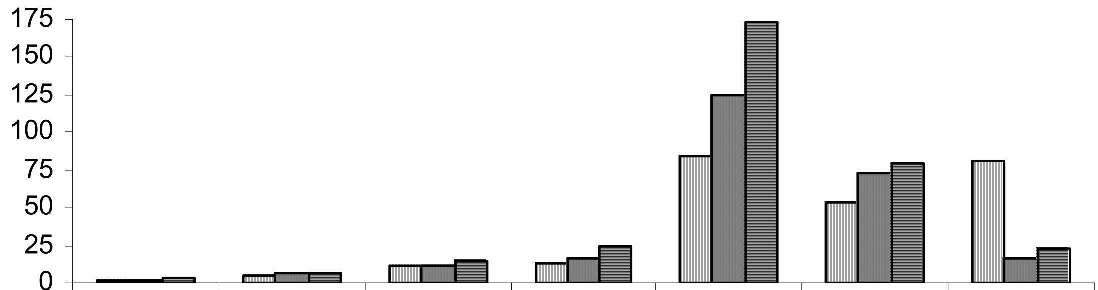
Another important finding is that only 13 (2.7%) of the registered translation service providers have four or more employees, which suggests that most of the work is done by freelancers and that we have not experienced the shift to large translation and document processing companies who rely mainly on their in-house staff, as suggested by Sager (1993). However, there is still a strong correlation between company size and turnover, as eight of the top ten companies (in terms of their market share) have between 4 and 17 employees.

2.5. Turnover

In addition to the increase in the number of businesses providing translation services, the volume of translations they complete and consequently their turnover has been on the rise as well (see Figure 2). Figures for 2004 to 2006 were analysed, because data for 2007 was available at the time. From 2004 to 2006, Slovenia's translation industry enjoyed 3% annual growth. This is still less than the European average, which stands at 4% per annum (Boucau 2006), but there is an upward trend. Boucau estimates that this level of growth cannot be expected to change until 2012.

Demand for translation is growing for many reasons, but the primary ones are membership in the EU and all consequent activities; a more mature IT and technology market requiring more localisation; a better economy and more international business relations overall. The number of companies rises each year in all turnover categories except the last one (those with a turnover of less than €1,000), where it falls by 71%. This could be interpreted as a sign that translation services are becoming increasingly professional. If the number of translators in the lowest turnover bracket is falling while all the other categories are gaining importance, this indicates that there are now fewer part-time translators and companies who offer translation as just one of their business activities.

The greatest change is apparent in the €10,000 to €50,000 turnover category, where the number of companies has doubled in the past three years. In the first three categories (turnover of €100,000 or more), limited liability companies prevail but are greatly outnumbered by sole proprietors in the final three categories (turnover of €10,000 or less). This suggests that larger and more complex translation jobs can only be tackled by teams, and that self-employed freelancers cannot take on the growing number of languages requested for each translation project. The observed trend is in line with Boucau's findings (see above).



	over 1000	500-1000	100-500	50-100	10-50	1-10	under 1
2004	1	5	11	13	85	54	81
2005	2	6	12	16	124	73	17
2006	3	7	15	25	174	79	23

Figure 2: Annual turnover of translation companies (in €1,000)

2.6. Market share

The translation industry market is very fragmented. This can be seen in the uneven distribution of companies according to their market share (see Figure 3). The market leader has more than 10% of the market share. The top three companies cater for more than a quarter of the market, and the top ten companies (2% of total) control more than half of the market. As Table 2 shows, the largest ten companies have lost some market share in the past three years, but considering that 198 new companies (41%) have been established since 2004, their loss is not significant. There is not much change in the top ten group. It consists of the same companies through the years, but there is some variation in their ranking. In broad terms, companies from the first half of the list have lost some market share since 2004 and the bottom two have gained a significant amount. The greatest drop in rank was six places and the greatest climb, four places in three years.

Compared to official figures quoted by Common Sense Advisory, where the 15 largest translation companies account for 47% of the worldwide market and are gaining more market share mostly through acquisitions, the top ten companies in Slovenia are likely to continue losing some of their market in future. If worldwide trends are likely to affect the Slovene market as well, we will see the most successful local translation companies and new local branches acquired by multinational corporations, not yet a characteristic of Slovenia. For example, the five largest language service providers according to Common Sense Advisory for 2000 were Berlitz, Bowne Global, Lernout & Hauspie, Lionbridge, and Alpnet. By 2006, Bowne and Lionbridge absorbed parts of Lernout & Hauspie, and then Lionbridge acquired Bowne in its entirety. SDL acquired Alpnet and recently it also took over Idiom.

	2004	2005	2006
top	14.81%	10.40%	10.93%
top 3	28.03%	25.86%	26.98%
top 10	54.55%	50.11%	51.42%
others	45.45%	49.89%	48.58%

Table 2: Market share in 2004-06[1]

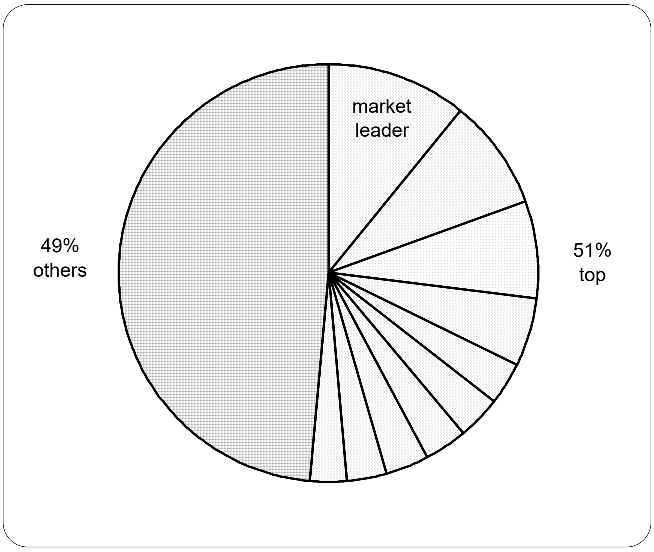


Figure 3: Market share in 2006

2.7. Market fluctuations

The data shows that Slovene translation companies have not been marginalised or forced out of the market either by large international translation companies or by outsourcing translations to lower-cost countries. Reasons for this are twofold: on the one hand, there are not many offshore translation companies who can provide large-scale, high-quality translations for Slovene. If clients were attracted by lower prices but were not satisfied with the quality of translations they received, they soon returned to local translation providers. Also, Slovene translation companies soon realised the price sensitivity of their services and were quick to adopt the latest technology to try to optimise their workflow, which not only helped them keep local clients by offering high quality local customer service, but also made them more competitive in the international market.

The data available to me do not show the share represented by projects for international clients. Nevertheless, I can guess that international clients do play a role in the Slovene translation market, because translation companies publish their affiliations with international translation institutions and translation service providers. A further indication that this is the case is the growing number of language combinations which Slovene translation companies offer. In addition, more and more freelance translators compete in the international job market by joining on-line translator directories (e.g. ProZ) or collaborate directly with translation agencies from abroad.

3. Working environment in the top ten companies

Social, economic and political factors that influence the dynamics of the translation market are closely intertwined and often cannot be observed in isolation. While it is true that the growing number of translation businesses and the rise in their turnover would not have been possible without favourable socio-political conditions, the first part of my research focuses mostly on the economic aspect of the Slovenian translation market. In the second part of the survey I give more attention to the nature of translation businesses, the services they provide, their workflow and the technology they use. This information has been obtained by analysing web pages of the ten translation businesses that have the greatest share in the market. These are: Amidas, Iolar, Ceformit, Star, Eurotranslate, Veris, Skrivanek, A3, Biro2000 and Thurn.

There are a number of differences among them; these could be divided into two main groups[2]: in the first, companies still offer very traditional translation and language editing services to local, technologically less demanding clients (Eurotranslate, A3, Thurn). The second group is larger and consists of more technically-oriented companies using the latest translation technology and carrying out complex, often multilingual, translation and localisation projects (Amidas, Iolar, Ceformit, Star, Veris, Skrvanek, Biro2000).

3.1. Type of organisation

Eight of the ten companies are limited liability companies (Amidas, Iolar, Ceformit, Star, Veris, Skrivanek, A3 and Biro2000), one is a sole proprietorship (Eurotranslate) and one a limited partnership (Thurn). This shows that a well-staffed and well-organised team is required to deal with complex translation projects.

3.2. Year of establishment

Nine companies are more than five years old, only one of the companies was established in 2006 (Thurn). It is interesting to observe that the youngest company is among the least developed as far as project management and translation technology are concerned. On the other hand, most of the oldest companies have developed clear translation workflows and have taken advantage of the translation technology available (Amidas, Iolar, Star, Biro 2000). This suggests that optimisation of the translation process and quality assurance standards are evolutionary processes that develop with the maturity of the company and are adapted to its current needs and abilities as discussed by Thomson-Wohlgemuth (2004).

3.3. Number of employees

According to the data obtained from the register, four companies in the top ten group have more than ten employees. Iolar heads the list with 17 employees, followed by Ceformt (14), Veris (12) and Star (11). Four companies have more than three (Amidas, Skrivanek, A3 and Biro2000) and two companies have only one employee (Eurotranslate and Thurn). Naturally, these companies have more temporary in-house staff and use even more freelancers but the figures are still rather low, especially for a labour-intensive industry and a sector that has been experiencing steady growth for a number of years now. One of the reasons is perhaps the inflexible employment and tax legislation in Slovenia, that is not well suited to unpredictable and changeable circumstances in which translation companies have to survive. The other reason could be that the owners and managers of translation companies have yet to realise the true value of in-house know-how and experience. They do not see their staff as their main asset and a long-term investment but prefer to contract out most of the work and save costs on social security benefits, office space and equipment instead.

3.4. Services

Companies provide a different range of services. The less technically oriented ones provide translation, interpreting and language editing, while those with a more technical orientation also add localisation, web content translation, subtitling and desktop publishing to the list. Iolar and Ceformt work only with three or four languages; others offer services in all major world languages. The two branches of international translation companies send jobs in the languages they cannot provide in Slovenia to be translated locally by other branches of the same company.

There were only three companies that specialise in a niche market (Iolar, Ceformt and Star), the rest try to cater for every possible client. Perhaps translation companies in Slovenia should pay more attention to knowing their limitations and offering the services they are most qualified for.

3.5. Translators

Ceformt, Iolar and Star do their work only with in-house translators. Veris, Amidas and Skrivanek use both in-house and external translators while Eurotranslate, Biro2000, A3 and Thurn only use external translators for their jobs. They report a network of 50 to 600 freelance translators in Slovenia and abroad. Companies with in-house translators resemble translation departments in big companies. They are more specialised and regularly provide training and plenty of technical support for their translators. On the other hand, companies that mostly rely on freelance translators act more as intermediaries in the translation cycle and therefore only employ project managers and administrative staff who take care of the financial and organisational aspect of projects, the rest being contracted out to freelancers. They hire translators according to their immediate needs and are less motivated to invest in their training or to provide technical support. They have developed sophisticated translation workflows and use project management software to help them with their every-day distribution of work and communication with their translators.

3.6. Clients

Three of the companies carry out large-scale projects for their long-term regular clients (e.g. multinational companies from automobile, mobile phone and software industries), while others combine big projects with smaller one-off jobs as well. This is another important difference between the companies because the nature of their work varies greatly. On the one hand, there is the need to commit fully to the user's needs and requirements in long-term large-scale projects, in many cases highly-specialised staff are required or have to be trained, the dynamics of incoming translations is predictable and quality assurance is constant. On the other hand, companies that perform mainly one-off translations for smaller clients and do not specialise need translators with very different profiles, cannot plan the volume of work over a longer period of time and need different quality assurance strategies for different kinds of jobs. One of the advantages for these companies might be that they do not rely on a single client and will be less affected when the project ends.

3.7. Technology

The three companies that provide less technically oriented translations do not report on the use of any technology on their webpage. The rest of the companies all use CAT tools for translation memory and terminology management (mostly Trados), two of them have server-based licences (Iolar, Ceformt). In addition, Veris, Skrivanek and Biro2000 accept on-line orders, Iolar and Star automate their workflow with a content management and a project management system. Iolar also provides security in terms of hardware solutions as well as non-disclosure agreements. There is no doubt that translation service providers in Slovenia have realised that the increase in efficiency needed to deal with the growing demand for translations can only be achieved by the use of the latest translation technology at each step in the translation process.

3.8. Quality assurance

Most companies assure quality by using professional language editors to revise translations. In addition, five companies ensure consistency throughout a given project by using a translation memory and terminology database (Iolar, Ceformt, Biro2000, Skrivanek and Star). Iolar and Star have automatic document quality checking in place, Ceformt has its internal style guide and Star has adopted the ISO 9001 2000 and DIN 2345 standards. Although quality assurance is dealt with very differently by these companies, the fact that most of them see it as a crucial part of the service they provide is a clear indication of their efforts to reassure their clients that they will receive a quality product. According to Thomson-Wohlgemuth (2004), the commitment to work to industrial standards is instrumental in demonstrating a translation company's dedication to quality. However, such process-based standards are regarded by many as inappropriate for translation businesses. One common criticism is their failure to emphasise the role of people both in the definition of the processes and in their implementation. They are also expensive to obtain and follow. This is perhaps why they have not yet been adopted by more translation companies in Slovenia. The analysis of translation companies' websites shows that, at least among the key players in the translation market in Slovenia, industrialisation and technologisation are already well on its way (Baer and Koby 2003). A large majority of the companies I have considered deal with bigger and more complex translation jobs which can be tackled only by teams and with the help of IT. Also, the working environment of translators in Slovenia is evolving towards decentralised global teams, which is why efficient project management has become an important feature of the larger translation companies.

4. A case study of project management in a large translation company

Pérez (2001) claims that the link between technology on the one hand and project management on the other is of key importance to translation project management because the translation industry can only respond to market requirements with a set of good tools. She divides project management into three levels:
(1) business management (cost accounting and invoicing);
(2) process management (translation workflow, file transfer and internet collaboration);
(3) language management (translation memory and terminology).

An experienced and resourceful manager is crucial for any project but a good project management system should be helpful at all three levels. In this case study, the project management system of Biro2000 is presented. This company was selected because its translation company has seen the biggest increase in turnover in the past three years. Such an expansion of business could not be feasible without an efficient project management and IT support, which is why I was interested in their solution. Their approach is standard from the technological point of view, and it does not introduce any novel ideas as far as project management theory is concerned. However, the realisation that such a system is needed and the willingness to make a substantial investment in its development and maintenance is still quite rare in the Slovene environment and can therefore be seen as a sign of the maturity of the company and as an indication of future trends in the Slovene translation industry.

4.1. Technical aspects of the system

Although there are many commercial project management systems available on the market today (e.g. across Language Server, Advanced International Translations Projetex, SDL Trados Synergy), the translation company I visited and interviewed had automated parts of the business process (such as invoicing and accounting) before, and wanted to leverage their previous investment, which is why they opted for a tailor-made system.

The on-line system is hosted on an external server, is written in PHP language and uses the MySQL relational database. The development and testing phase lasted for about six months and the company started using it in November 2006. The main components of the system are two databases. One is a database of translators who work for the company and the other contains all the information about the company's clients. Translators who are interested in working with the company fill in the translator's profile and are added to the database. When their profile is processed, they receive a test translation. If they pass, their status changes from pending to active, which means from this point on they will be considered for the jobs that match their profile (e.g. language combinations, areas of specialisation, daily translation capacity). Their database currently contains about 600 translators. The database of clients and jobs is maintained by project managers.

Most efforts have been invested in the first two levels of project management while the third, language management, is currently carried out by an external commercial application. The system speeds up business management by the automatic creation and sending of contracts, purchase orders and invoicing. At process management level, the system can be used to search automatically for the most suitable translator/language editor for the job. The person is then contacted by the system and able to confirm or reject the offer. File handling and communication by e-mail are automated as well. The system also enables automatic job tracking and reporting. When the project is finally confirmed by the project manager, the client is automatically notified. In addition, the system supports the reporting of any problems that may occur during the project. In this way problems can be analysed and solved systematically, and the workflow can be improved if necessary. Language management is currently not integrated in the project management system. The company is using Trados Synergy 2007 floating licenses and plans to upgrade to SDL TM Server in the future.

4.2. The system at work

The project management system the company has developed has been in use for a year. During this time they have collected 600 translator's profiles and have entered over 500 clients into their database. In one year the system was used to manage about 6,000 projects in 35 languages and 139 language combinations. Over 12,000 pages were translated within these projects and 932 hours were spent on various jobs that charged by the hour (e.g. proofreading, glossary maintenance, PDF checking). Overall, the most frequent language combinations for translations are: English-Slovenian (9,500 pages), Slovenian-English (3,000 pages) and German-Slovenian (2,400 pages). The most frequent language combinations for translation jobs charged by the hour were English-Slovenian (280 hours), English-Macedonian (90 hours) and Slovenian-English (70 hours). It must be noted here that Macedonian is not one of the major working languages for translators in Slovenia in general. The translation company presented in the case study happened to have a large client in need of this language combination.

As far as editing is concerned, the top three languages in the past year were Slovene (5,800 pages), English (1,700 pages) and Croatian (500 pages). Similar to translations, the language editing of Slovene texts charged by the hour amounted to 100 hours, with 50 hours for Croatian texts and to 18 hours for Macedonian texts.

4.3. Plans for further improvements

Improvements of the system involve allowing clients to track their projects down and have access to all project materials. In this way, an archive of translations will be made available to clients and dealing with complaints will be improved. Eventually, the client's profile could evolve into a fully automated web service requiring little input from project managers who could devote more of their time to intellectual tasks that cannot be automated. Such services are already in use by large international translation companies, such as SDL's Click2Translate. Despite the development and maintenance costs, the company is very satisfied with the system they have integrated into their workflow and believe it has contributed significantly towards the greater capacity, better organisation and higher quality of their service. Freelance translators and language editors who have to use the system on a daily basis have also expressed very positive opinions about their experience and have gained confidence in both the company and their work. It will be interesting to see how other translation companies address the issue in the future.

5. Conclusions and outlook

The survey of the private translation sector I conducted in Slovene translation companies officially registered as businesses in the official business register of Slovene companies and by the analysis of the web pages of the biggest Slovene translation companies, shows that Slovenia has experienced a high degree of professionalisation and regulation of the translation sector compared to the situation of professional translators in the first years of Slovene independence (Omerza 1997). The translation market in Slovenia is smaller than in most other European countries. But when their trends are compared, Slovenia displays similar growth in volume and turnover to Greece, Italy, Holland and Hungary, countries that have seen 5-7% growth between 2004 and 2006. In line with the situation in other countries, one of the most important factors in securing large translation projects in Slovenia is the size of a translation company in terms of productivity, the services and the number of language combinations it can provide.

This is why translation workflow in the biggest translation companies has changed and has become more technology-driven as predicted by Austermühl (2001). As a consequence, several aspects of the translation process are affected: the communication with clients and other translators, the speed and amount of information that can be retrieved and the way texts are created and handled (Pym 2003).

In this setting, translators are required to acquire new skills to remain competitive in the market. This need is already being addressed by the redesigned university syllabuses (e.g. Gabr 2001; Biau Gil 2006; Jaatinen and Jääskeläinen 2006; Li 2000) but there is considerably less support for other language-related professions that have proliferated, most notably that of project manager (Shreve 2000). The future of the translation industry will continue to be strongly influenced by advances in technology. The Internet bandwidth will increase, hardware costs will continue to fall while performance increases and subscription to server-based software will make translation tools accessible to an even broader audience. According to Zydron (2006), all this will give rise to borderless virtual translation companies. Web services that will fully automate quoting and file handling will reduce the project management burden, allowing more resources for quality assurance. This leaves us just a step away from what Zydron calls direct web translation in which translators will no longer be sent any files, they will just log on to a web application and translate directly from the web with full support of the required tools, such as spell checking, concordances, automatic terminology detection, and translation memories. The analysis presented in this paper shows that the major translation companies in Slovenia seem to be aware of this fact and are responding to the changed needs of the market which is following the trends observable in other European markets.

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Biography

Darja Fišer graduated from the Department of Translation Studies at the Faculty of Arts, University of Ljubljana, Slovenia in 2004 with a thesis on the introduction of Trados into a workflow of a translation agency that received the faculty award for best thesis. She now teaches courses on translation tools as an assistant in the same department, participates in national and international projects in the field of human language technologies, and is working towards her PhD in computational lexical semantics.
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[1] This table gives information on the market share of translation companies, broken down into four categories: market leader, top three companies, top ten companies and others. Because the market leader is included in the top three companies category and these are included in the top companies, the sum total exceeds 100%. But the figures for the top ten companies and all the others add up to 100%.

[2] While it is true that there is a difference between *translation companies*, which typically hire in-house staff, and *translation agencies*, which outsource much of their work to freelance translator, the distinction between the two types is not always clear-cut. For example, some translation companies may hire registered free-lance translators only for the duration of a large translation project, while the translators are free to continue to work for several clients. On the other hand, some agencies that do not employ translators organise the work to be carried out on their premises and equipment with external staff due to the technical or confidential nature of their translation project. This is why I do not distinguish between the two types of organisations and refer to all translation business that are analysed in this section as *companies*.