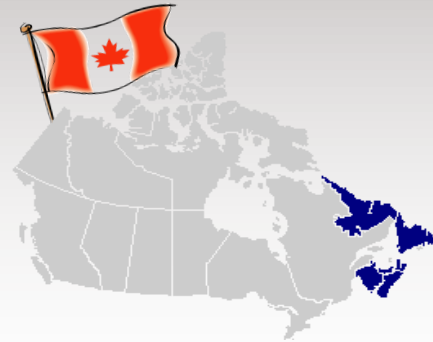
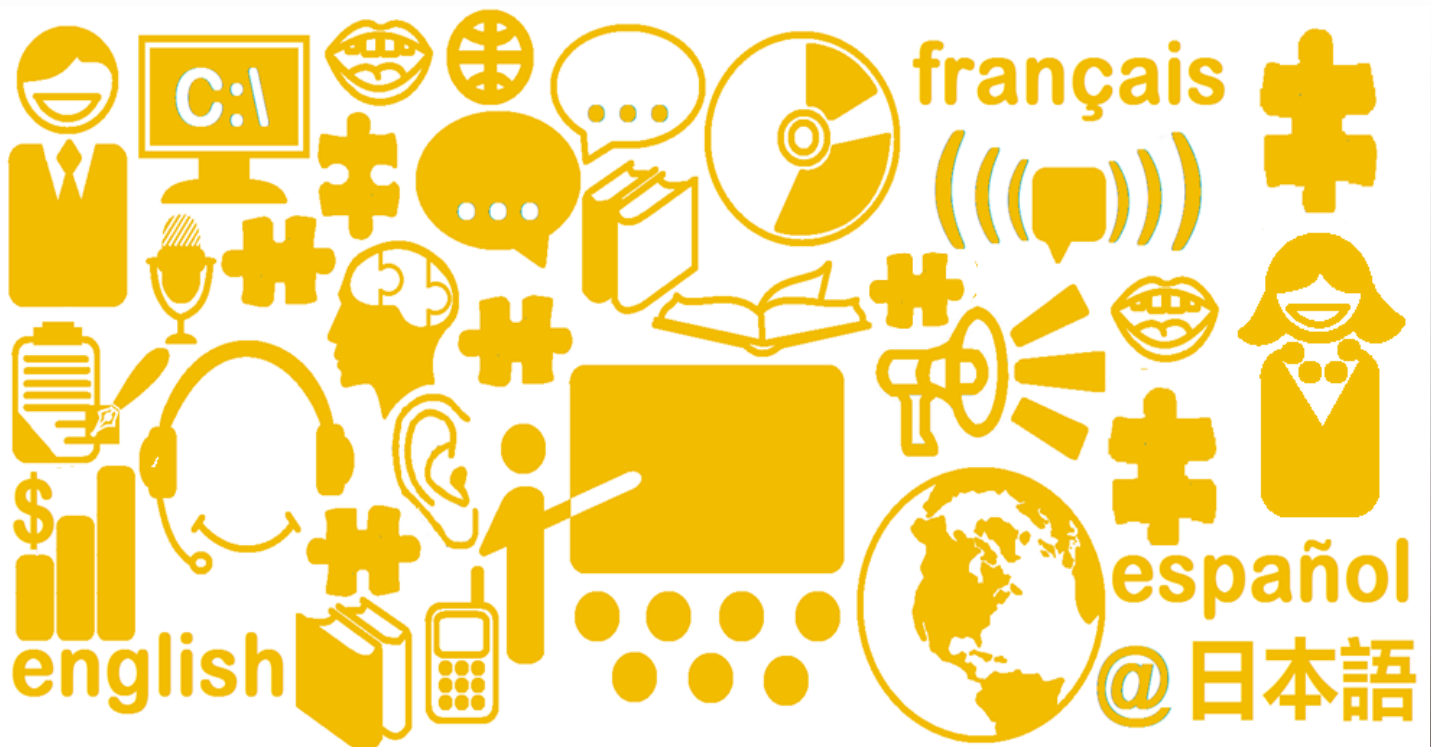


Publication of the Economic Information Observatory (EIO) for Regional Cooperation
between Atlantic Canada and Saint-Pierre and Miquelon, France



The Language Industry





The Economic Information Observatory (EIO) for Regional Cooperation between Atlantic Canada and Saint Pierre and Miquelon

Intell-Écho : Thematic Information Bulletin

Are you looking for business opportunities in this sector?
CACIMA and FCCC-AN can facilitate your exploration and partnership initiatives.
(see contact details on page 8)

Intell-Écho, vol. 1, n°9, 2014
ISSN 2272-0219

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The Economic Information Observatory is a regional cooperation project established between Atlantic Canada and Saint-Pierre and Miquelon. The publication of this information bulletin is made possible through the sponsorship of the Atlantic Canada Opportunities Agency and its various programs supporting research initiatives, linguistic minorities and business development, and the Province of New Brunswick as well as the Université de Moncton, Shippagan Campus, and the Prefecture and Territorial Council of Saint-Pierre and Miquelon.

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Information Policy: The aim of this project is to provide useful information to stakeholders seeking to promote regional cooperation between Atlantic Canada and Saint-Pierre and Miquelon. Information supplied herein may be used on the condition that the **Intell-Écho** bulletin be cited as a source.

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Language services in France and in Saint-Pierre et Miquelon...



◊ A market estimated at approximately **1 billion euros in 2013.**

◊ A rapidly growing sector : the demand for language services **increases by more than 10% per year.**

◊ A highly **fragmented** sector, with nearly **3,000 freelance translators, approximately 400 translation companies, and 800 language training organizations**, nationally.

A heterogeneous market

The language services market is one which includes various segments :

- ◊ translation
- ◊ correction/revision
- ◊ localization (texts and software)
- ◊ interpretation
- ◊ education
- ◊ indexing
- ◊ research and engineering

Some language professionals work in various fields while others specialize.



The EU on the cutting edge of language services

The EU has the largest interpretation service in the world: approximately **1,000 interpreters** provide this service for more than 11,000 meetings per year. The EU is also **a major player in language technologies**. It is one of the **most advanced markets in this sector**. Details regarding the European strategy in this field can be found at :

http://tcstar.org/publicazioni/ITC_francese.pdf



The Francoforum

The Francoforum is a language institute, which has **specialized in the teaching of French as a second or foreign language, since 1992.**

With emphasis on methods of communication, the Francoforum offers various interactive immersion courses throughout the year at the institute. Two of the main objectives of the Francoforum are :

- ◊ to help people to improve their level of French;
- ◊ to introduce people to French culture.

For additional information : see A word from an expert p.3



Translation consists of translating ideas expressed in writing from one language (source) to another (target), whereas **interpretation** aims at translating ideas expressed orally, or through the use of parts of the body (sign language), from one language to another. **Interpreters are therefore specialists in oral communication, while translators focus on writing.**

Main strengths of the sector
High quality training and skilled workforce.
Development based on the strength of the francophone world community.
The globalization of markets is a strong growth catalyst.

 Canada has one of the most well-developed language sectors in the world due to the fact that it has been using two official languages for more than 40 years. The Canadian legislative framework necessitates the translation of many official documents. This explains the significant development of this sector which includes more than 15,000 professional translators. It is estimated that approximately 90% of the translation done in Canada is provided between French and English.



Focus on Human Language Technologies (HLT)

France is a very advanced country in terms of language technology, as evidenced by its well-developed scientific communities and its extensive research in HLT. The country therefore is ideally positioned to exploit this sector. Most of the players are small businesses that focus on niches within their national market. However, the LT industry is gradually moving up the value chain through applications and consumer markets.

The main players in R & D for HLT

CRISCO (Centre de Recherche Inter-langue sur la Signification en Contexte) : this research team from the University of Caen specializes in the analysis of the relationship between syntax and semantics. The laboratory regularly organizes seminars and workshops. <http://www.crisco.unicaen.fr/>

HULTECH (HUMAN Language TECHNOLOGY) : HULTECH deals with issues related to Human Language Technologies. Within this framework, it concentrates its research on the following five areas: Document Engineering, Language Engineering, Textual Knowledge Engineering, Information Retrieval and Human-Machine Communication. Therefore, the team is developing many software platforms for processing web data and heritage archives, with a particular interest in mobile platforms and content accessibility. <https://www.greyc.fr/fr/hultech>

ATALA (association pour le traitement automatique des langues) : this association is dedicated to the development of Natural Language Processing (NLP). The association's website offers many resources on this subject (books, journals, databases ...) <http://www.atala.org/>

All of the research teams are listed here : <http://www.atala.org/Equipes-de-recherche->

Key Figures

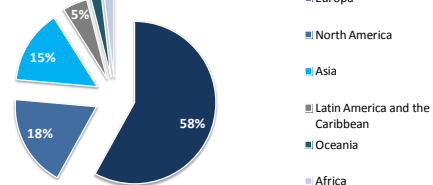


The world market for Language services

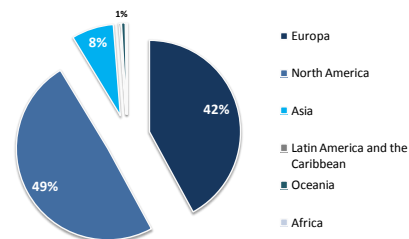
- ◊ The market for organizations offering language services is growing at an annual rate of 7.4%.
- ◊ Turnover of 38.96 billion USD in 2014 (forecast).
- ◊ Most of the revenue continues to be associated with translation services.
- ◊ The estimated revenue of the translation software market amounted to approximately 575.5 million USD in 2010.
- ◊ Revenue is expected to reach 3 billion USD by 2017.
- ◊ The sector has more than 25,000 organizations offering language services in 152 countries.

Breakdown of the market

By number of players



By turnover



The main players in the French market for translation*

- | | |
|-----------------------------------------------------------|--------------------------------------------|
| 1. ORTEC EUR 1 billion | 7. Tradutec EUR 10 million |
| 2. Ubiqus EUR 60 million | 8. Optilingua International EUR 10 million |
| 3. Telelingua EUR 17 million | 9. ADT International EUR 8 million |
| 4. Datawords Datasia EUR 16 million | 10. WHP INTERNATIONAL EUR 7 million |
| 5. Linguistique Communication Informatique EUR 15 million | 11. HL TRAD EUR 6 million |
| 6. Technicis EUR 11 million | 12. CPW Group EUR 3 million |

* these players are not all French and, in general, translation represents only a part of their business. The turnover shown is the total.

The main players in the French market of language training

	Type of network	Turnover (2010)	Number of centres
CEL-CCI	Parapublic	77 million	110
Wall Street Institute	Private	40 million	32
Berlitz - Telelangue	Private	35 million	67
GRETA	Parapublic	21 million	220
Inlingua	Private	19 million	40

A Word from an expert

Interview with Mrs. Jugan, Director of Education at the Francoforum in Saint-Pierre and Miquelon.

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www.lefrancoforum.com/



lefrancoforum@gmail.com



Can you give us some numbers that illustrate the success of the Francoforum programs?

The reception of high school students from Newfoundland and students from Memorial University, for an annual total of 700 and 55 respectively, contributes significantly to our growth.

The addition of a second Canadian Parents for French summer camp allows us to double the number of participants.

The offer of a new strictly cultural program met with encouraging success with 40 participants in 2014.

In your opinion, what are the reasons for this success? What are the strong points of the Francoforum programs?

Several reasons explain our success :

- ◊ The geographical proximity to Canada which facilitates accessibility to the French culture.
- ◊ Customer loyalty and the support of governments in the allocation of grants for some programs.

- ◊ The increase in our visibility through participation in trade fairs and forums across Canada and also through word of mouth advertising which works so well.
- ◊ Finally, the diversity and authenticity of the programs offered, whether they are linguistic or cultural, individual or group, for people of all ages-these are the pillars of Francoforum.

Do you think there are opportunities for development around language services in a broad sense in Saint-Pierre and Miquelon?

Yes, there is a greater economic potential, particularly for the Francoforum. The prospect of offering online programs is a possibility for development, in this Internet era.



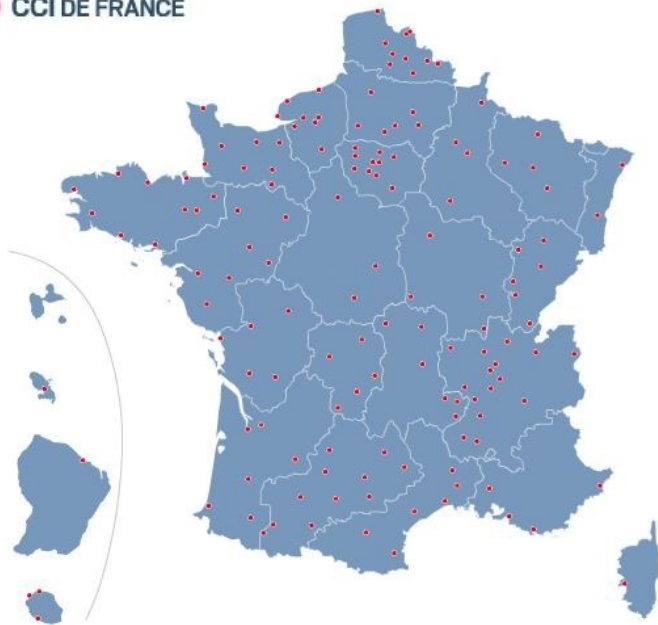
Upcoming events



Nom	Organisateur	Date	Lieu
TALN Conference (Traitement Automatic Natural Language Processing)	Caen-Basse Normandie University	June 22-25, 2015	Caen
EXPOLangues	L'Express	February 5-7, 2015	Paris
Conférence CNET (National network of translation companies)	CNET	March 2015	To be determined

Useful Information

The CCI network of centres for the study of languages (Centres d'Etudes des Langues)



The C.E.L. network includes nearly 100 Centres d'Etude de Langues (C.E.L.) distributed throughout all of metropolitan France. Coordinated and facilitated by CCI France, it is **the largest national operator of foreign language training for adults.**

The C.E.L. network represents more than :

- ◊ **26 languages taught** : modern foreign languages, French as a foreign language (FLE), regional languages...
- ◊ **3,000 professional trainers**, mostly native speakers of the language taught,
- ◊ **80,000 people trained** each year throughout France,.
- ◊ **1.5 million hours of training** provided every year
- ◊ **35 years of experience in teaching** languages to adults.

Associated with the Chambers of Commerce and Industry (CCI), these certified centers benefit from a privileged contact with companies and their employees. They offer solutions adapted to the needs of their respective markets, locally.

<http://www.reseau-cel.cci.fr/>



Links and contacts of Potential Interest

Export in France or acquire french products or services

- French agency for international investments : <http://www.invest-in-france.org>
- CCI France International : <http://www.cci-france-international.org/>

Principal sources of information utilized in this bulletin:

Organisation Internationale de la Francophonie, Price Waterhouse Cooper, Europa.eu, Translation 2.0, lesmétiers.net, LT-Innovate.eu



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4

If you are seeking
business opportunities in this sector,
CACIMA and FCCC-AN
can facilitate
your business prospection and
Help with establishing new
partnerships.



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Dieppe (NB) E1A 1G9
From Canada : 1 506 877 5014
From France : 00 1 506 877 5014
Email: direction@ccfcra.ca
Site : www.ccfcra.ca



Atlantic Canada – 4 provinces:
 Prince Edward Island (PEI),
 New Brunswick (NB),
 Nova Scotia (NS),
 Newfoundland and Labrador (NL)

Intell-Écho, vol. 1, no. 9, 2014
ISSN 2292-518X

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Information Policy: The aim of this project is to provide useful information to stakeholders seeking to promote regional cooperation between Atlantic Canada and Saint-Pierre and Miquelon. Information supplied herein may be used on the condition that the *Intell-Écho* bulletin be cited as a source.

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The Language Industry in Atlantic Canada

Since its founding in 1867, Canada has had two official languages: **English and French**. As such, the federal government is obligated to produce all official documents in both languages and to ensure full recognition of English and French by government institutions. Provincial and municipal institutions have a variety of systems in place to accommodate linguistic requirements. In **Atlantic Canada (AC)**, long attentive to the needs of its Francophone community, linguistic policies are subject to regular review. **New Brunswick** is Canada's only officially bilingual province and guarantees service in both official languages to its citizens. Whether in the areas of translation, official documentation, court interpreting or language training, the language industry helps to drive the country's social, cultural and political development.

Language industry



Official languages spoken in AC (2011)

	English only	French only	Bilingual
PEI	120,590	130	17,005
NB	426,675	66,380	245,885
NS	814,670	875	93,435
NL	485,740	135	23,450

22 language training centres (2011)

With a population that is 33.2% bilingual, NB has the highest number of **translation agencies** in AC. NB is also home to the region's alliance of professional translators (ALIANCO). NS is the leading province in AC in the area of language training, with 10 **language schools** generating more than \$640,000 in 2011.

PEI (3); NB (6); NS (10); NL (3); Canada (590)

Canada-European Union Comprehensive Economic and Trade Agreement (CETA)

CETA provides Canada access to the European market, increasing trade by 20% and growing Canada's GDP by more than \$12 billion annually. The agreement's chapters on **Regulation** and **Technical Barriers to Trade** set out certain provisions governing **compliance** as well as **marking** and **labelling**. Canadian companies seeking to export to the EU will be obliged to fulfil all linguistic requirements covered by CETA.

The **national standard** governing translation services is **CAN/CGSB-131.10-2008**.

An initiative to standardize and professionalize the community interpreting sector is also underway.

Cost of translation services

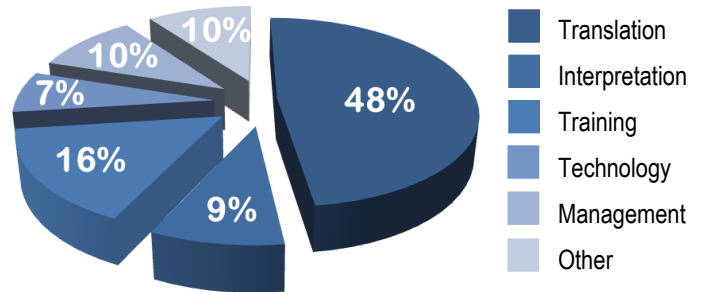
Pricing of translation services is not regulated in Canada. Rates within the industry in AC generally range between \$0.15 and \$0.25 per word.

The Language Industry: Key Facts and Figures

*most recent available statistics

The **language industry** generates more than \$38.9 billion worldwide annually, with Canada accounting for a little more than 10% of the market. Growth in this industry exceeds 7% annually, while the bilingual identity of Canadian public institutions ensures ongoing demand for language services. Some 90% of translation in Canada takes place between English and French. In 2006, industry revenue was distributed as follows: \$154.1M in translation, \$8.7M in interpretation and \$193.2M in training. The sector continues to grow in **Atlantic Canada**, which currently accounts for 4% of the Canadian industry.

The language industry in Canada (2012)

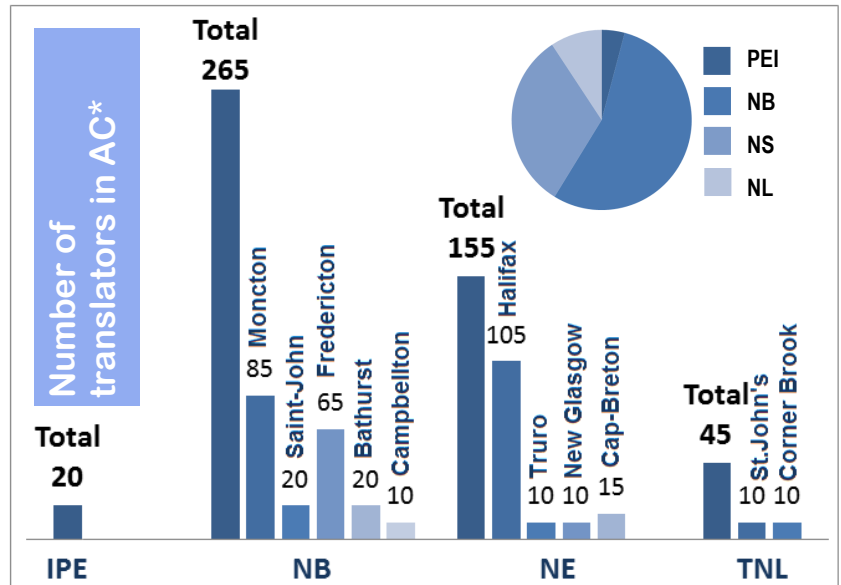


Access to language services

Administered by **ALIANCO**, the **Translation Assistance Program** offers financial aid to companies in AC

Employment sectors in translation (2013)	
Professional, scientific and technical services	60.0%
Public administration	13.6%
Federal administration	10.9%
Finance and insurance	4.4%
Information and culture	3.8%
Educational services	3.8%
Other	3.5%

At the national level, 38% of translation service providers export their services. Exports to the **US: 81%**; to the **EU: 38%**.



Establishments delivering translation services in AC*	
PEI	2
NB	58
NS	20
NL	5
Total Canada	2838

Average annual employment income in the translation sector*	
Full-time	47.3%
Average	\$49,988
\$0 - \$19,999	8.8%
\$20,000 - \$49,999	44.3%
\$50,000 or more	46.8%

- Nationwide, the translation industry in Canada means...**
- ◇ More than **800** translation agencies
 - ◇ More than **500** language schools
 - ◇ **100** R&D groups on linguistic tools
 - ◇ Approximately **30,000** direct jobs
 - ◇ An employment rate of nearly **98%**
 - ◇ Around **\$1 billion** in annual sales



Roadmap for Canada's Official Languages – Education, Immigration, Communities 2013-2018

To support the development of Canada's two official languages, the federal government launched the **Roadmap for Canada's Official Languages**, which supports a range of programs and initiatives to promote English and French in Canada. Funds under this program are distributed as follows: \$658 million to education, \$149.5 million to immigration and \$316.6 million to communities. The **Atlantic Canada Opportunities Agency (ACOA)** manages a \$6.20 million fund in order to promote the two official languages as per its Economic development initiative.

Development and Training in the Language Industry in Atlantic Canada



Language Industry Association

AILIA is a national association promoting the interests of the language industry in Canada. The essential industry representative to the public and private sectors, it is also responsible for certification within the industry.



Industry challenges and trends

CETA: The translation sector is preparing to leverage the business opportunities generated in the wake of expanded Canada-Europe trade by supporting industries and manufacturers seeking to establish new partnerships or invest in new markets.

Multilingual translation: Accelerating economic globalization is leading the translation industry to evolve in response to growing demand to foster relationships with emerging markets outside of the mainly Anglophone and Francophone spheres.

Interpretation: The industry needs a succession plan in AC as the immediate challenge will be replacement needs due to retirements.

Localization: This emerging discipline in language services involves the adaptation of information products to specific cultural profiles.



ALIANCO

Formerly known as NB Translation, **ALIANCO** is a not-for-profit organization based in Campbellton, NB, that seeks to rally and represent professional translators across AC to help support and promote the industry while also creating new business opportunities.

Leaders in AC

CLS Lexi-tech

Maritime Translation & Interpretation

Transmed Medical Transcription

Customized training

Centre international d'apprentissage du français (CIAF) **NB**

Université de Moncton (French immersion) **NB**

Université Sainte-Anne (French immersion) **NS**

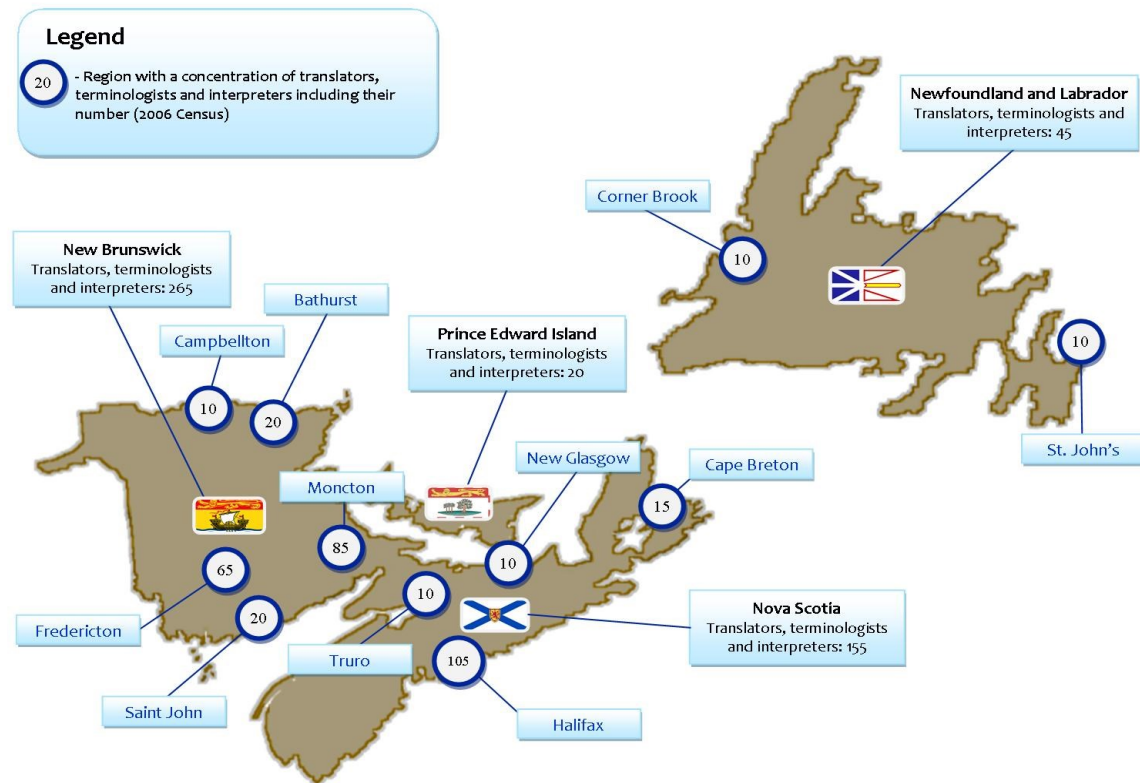
Post-secondary educational opportunities in AC				
	Program	Institution	Dur.	Diploma
NB	Translation	Université de Moncton	4 yrs	B.A.
	Certificate in ESL/FSL education	University of NB	1-2 yrs	Certificate
	Paralanguage services	CCNB Campbellton	1 yr	Diploma of advanced studies
	Bilingual medical transcription	CCNB Campbellton	2 yrs	College diploma
NE	Sign language	NSCC Dartmouth	1 yr	Certificate
	American Sign Language	NSCC Dartmouth	2 yrs	College diploma
	B.A. with certificate in translation	Université Sainte-Anne	4 yrs	B.A. with certificate

Professional associations and research/interest groups in Atlantic Canada	
National	Language Industry Association (AILIA)
	Translation Bureau of Canada
	Canadian Translators, Terminologists and Interpreters Council (CTTIC)
	Langues Canada
PEI	Acadian and Francophone Affairs Secretariat
NB	ALIANCO (alliance of professional translators in AC)
	NB Translation Bureau
	Centre international pour le développement de l'informa-tion en français (CIDIF)
	Centre de traduction et de terminologie juridiques (CTTJ)
	Corporation of Translators, Terminologists and Interpreters of NB (CTINB)
NS	Acadian Affairs (Government of NS)
	Association of Translators and Interpreters of Nova Scotia (ATINS)
	Dalhousie Natural Language Processing Group (Dalhousie University)
NL	Office of French Services (Government of NL)



Atlantic Canada is part of the innovation race in the area of **language technologies**. At the Université de Moncton, Shippagan (NB) Campus, **Centre DILan**, a language industry development centre, works closely with the **Laboratoire de recherche en interaction humain système (LARIHS)** and the translation agency **Transmed** to create a **new human-computer verbal interaction concept for improving the translation process**. Ultimately, DILan seeks to develop and market leading-edge language technologies.

Map: The Language Industry in Atlantic Canada



Links of interest if you are seeking to do business in this industry in Atlantic Canada

Alianco. www.alianco.ca

Language Industry Association. www.ailia.ca

Atlantic Provinces Linguistic Association.
www.unb.ca/fredericton/arts/departments/french/apla-alpa

Centre de traduction et de terminologie juridiques. www.cttj.ca

Cdn. Translators, Terminologists and Interpreters Council. www.cttic.org

CLS Lexi-tech. www.cls-lexitech.com

Dalhousie Natural Language Processing Group. www.dal.ca

Laboratoire LARIHS. www.umoncton.ca/umcs/node/79

Liberated Learning (St. Mary's Univ.). liberatedlearning.com

Maritime Translation & Interpretation. www.maritimetranslation.com

Osler. Doing Business in Canada.

www.osler.com/doing-business-in-canada-2011

Transmed. www.centretransmed.ca

Principal sources of information utilized in this bulletin:

Industry Canada; Statistics Canada; PEI, NB, NS and NL government websites; specialized associations; media sources



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If you are seeking business opportunities in this region, **CACIMA** and **FCCC-AN** can facilitate your business prospection process and help with establishing new partnerships



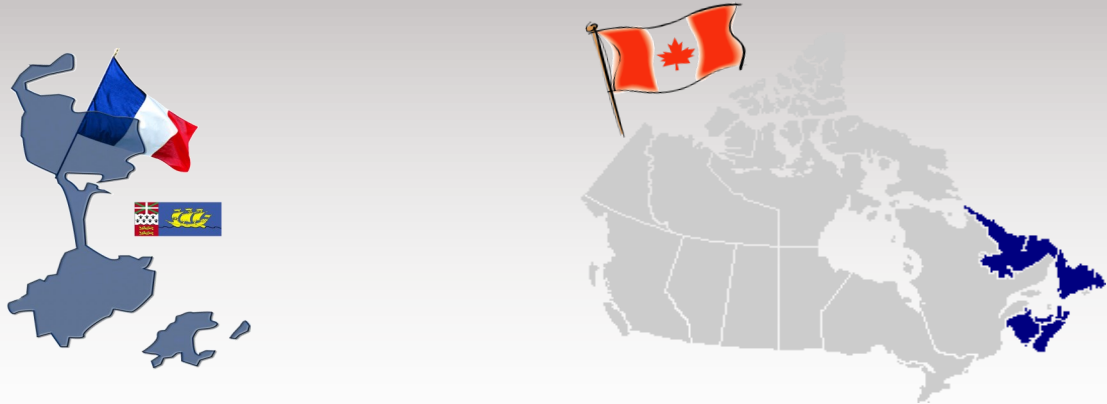
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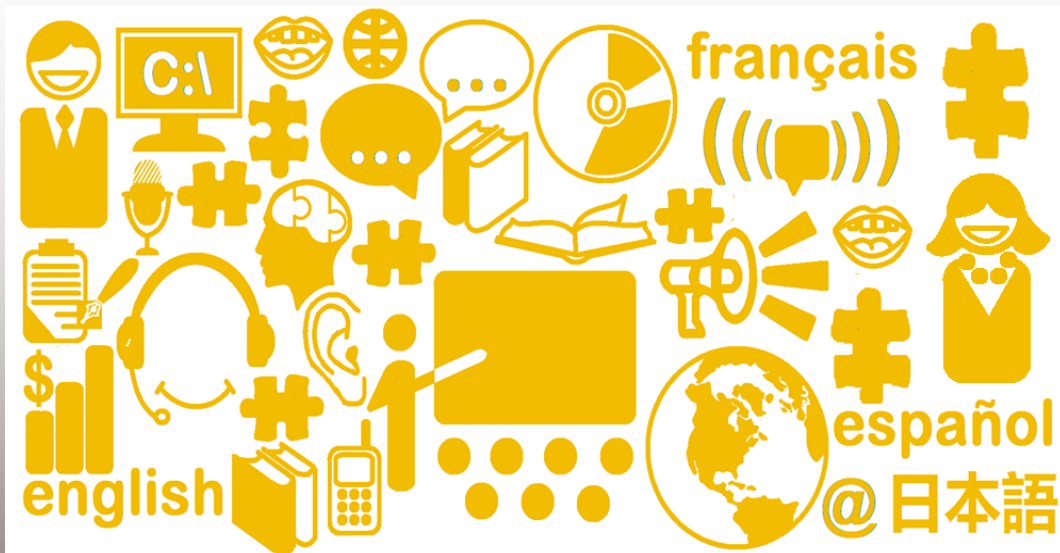
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