

Results of market study by QSD association

Language Services in Germany 2020

a guide for industry professionals



Qualitätssprachendienste Deutschlands e.V.



The Association "Qualitätssprachendienste Deutschlands (QSD) e.V." was founded in the spring of 1998.

QSD e.V. has brought together quality-conscious translation companies with their own audited quality assurance systems certified according to DIN EN ISO 9001 or ISO 17100, or proven quality assurance in line with the QSD quality guidelines.

The members of QSD as a whole play an important role in the German translation market.

36
members

720+
combined
staff

Close to €90
million combined
revenue

Mission: enhance
the reputation
of the sector,
represent the
industry

EUATC member

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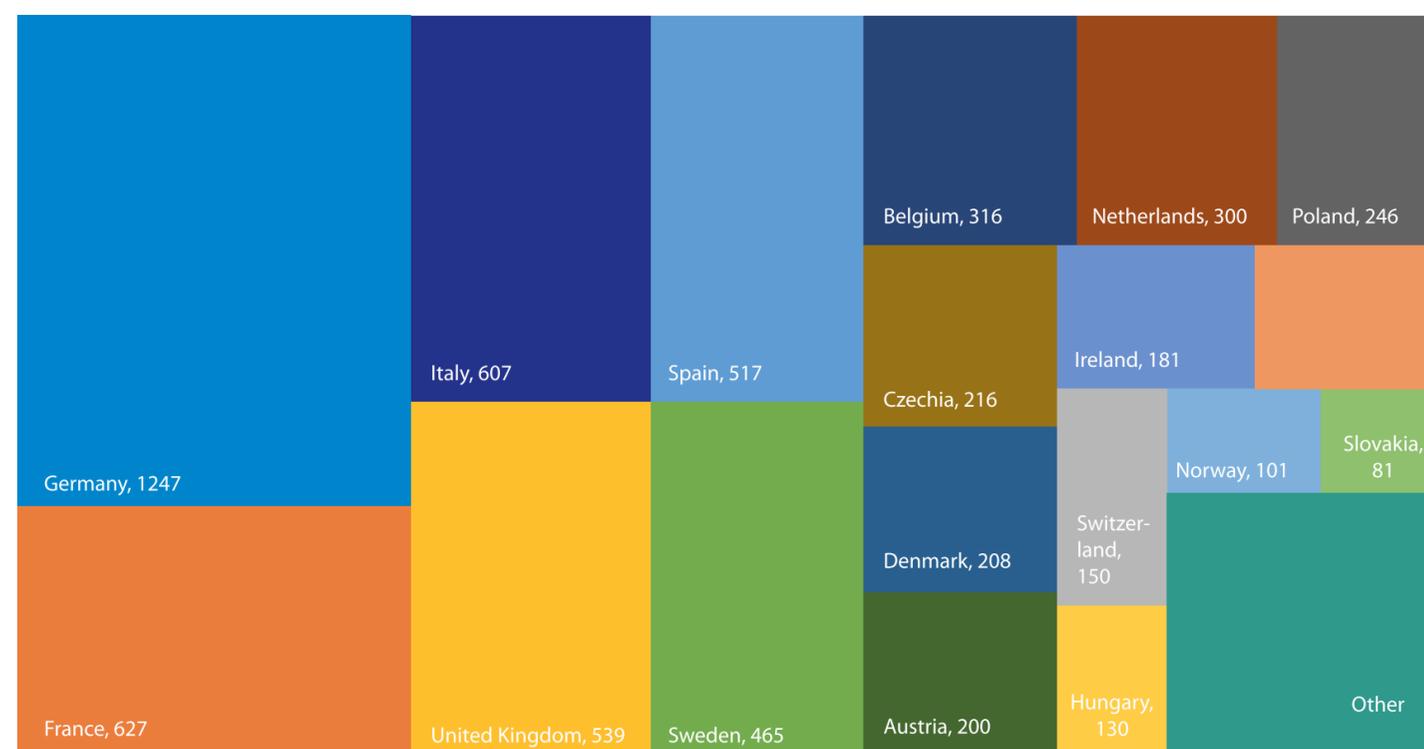
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The market

€1.25 bn: the largest EU market

Eurostat 2017 data + estimates, in € million



According to the fiscal data aggregated by Eurostat, LSPs in Germany generated over €1.25 billion in sales of translation and interpreting services, or about 19% of the EU market overall.

The only countries in the world that can produce similar volumes are the United States, China, and Japan.

Despite this immense opportunity, Germany has not produced a single LSP with a revenue over €100 million.

Germany: a key market

Germany is the most important market for language services and technology in Europe. It is the largest in revenue, and it is from here that many of the cornerstone translation technologies used everywhere around the world originate.

The language cluster in Germany is responsible for more than 25,000 diverse, knowledge-based jobs – from innovation in language AI to supporting German exports globally.

This market is on the cusp of transformation. This year, it is feeling the effects of the COVID crisis – with some businesses reeling and others seeing a record amount of work. In the next three years, it will consolidate at the top, shift towards more language services for the IT sector, and will witness rapid digitization of the Mittelstand, the medium-sized businesses that make up the core of the industry.

We are honored to identify, measure, and highlight these trends as they begin to unfold.

QSD contribution

In 2020, Qualitätssprachendienste Deutschlands e.V. conducted a study of the German market that included a survey of over 100 translation and interpreting companies, a series of interviews with business leaders, and a deep dive into the national statistics authority's (Destatis) figures.

Multiple sponsors and media partners supported this effort.

This report contains the study's findings. It is distributed free of charge to everyone who would like to work in Germany and drive the next wave of development for our industry.

Client verticals and sector specialists

“Industry” for the win

The largest customer vertical in the German market is technical translation for manufacturing and automotive companies, defined as “Industry” in the chart.

Life sciences (primarily medical device companies) and software sectors are growth areas.

The distribution in this chart is based on a sample of euro €165 million generated by more than 100 companies. The sample did not include many public sector providers, so the demand from government and municipal institutions is somewhat underrepresented.

Unlike the UK or the Nordics, public sector procurement is not centralized in Germany, and it is common to see self-employed professionals win contracts worth hundreds of thousands or even millions of euros.

Financial and legal - 7%



Marketing - 10%



Localization - 12%

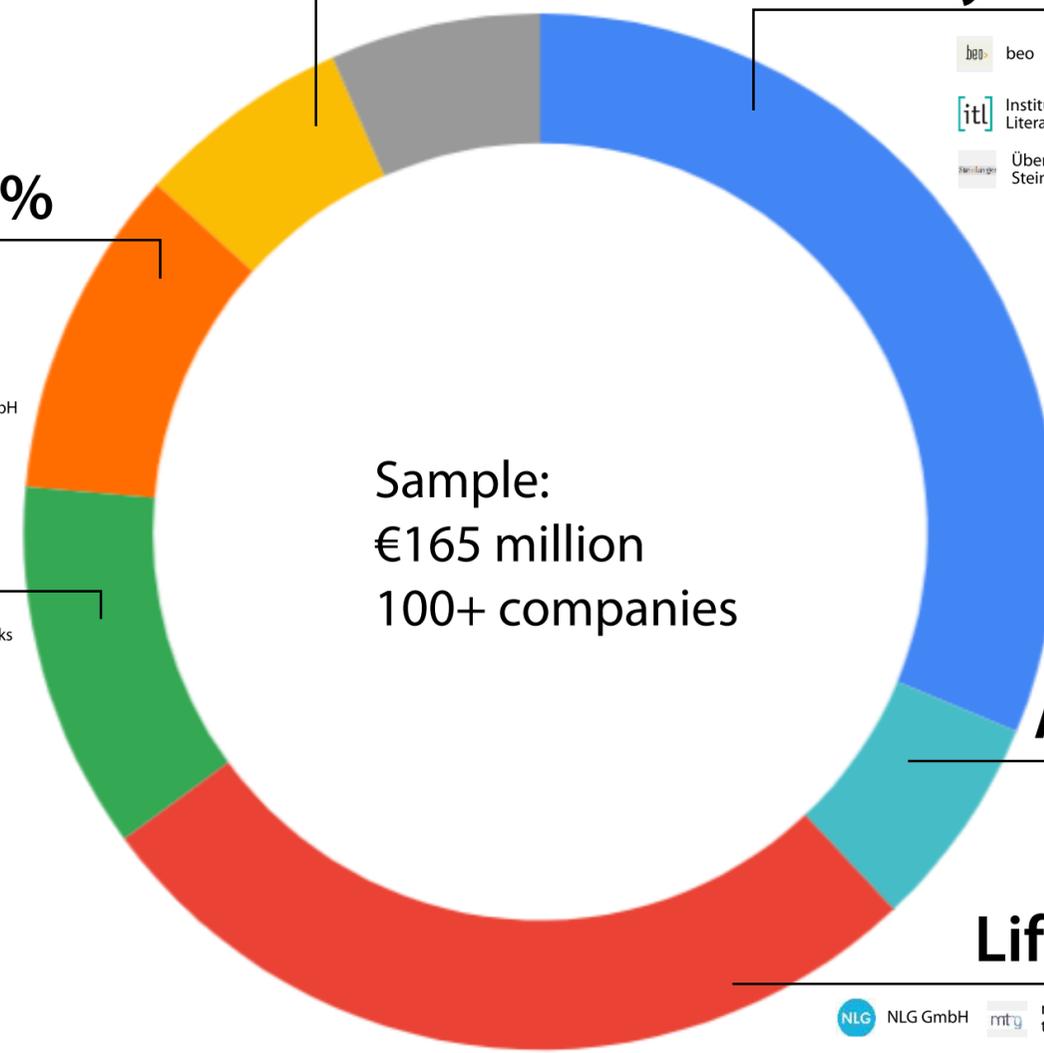


Industry - 31%



Automotive - 7%

Life sciences - 27%

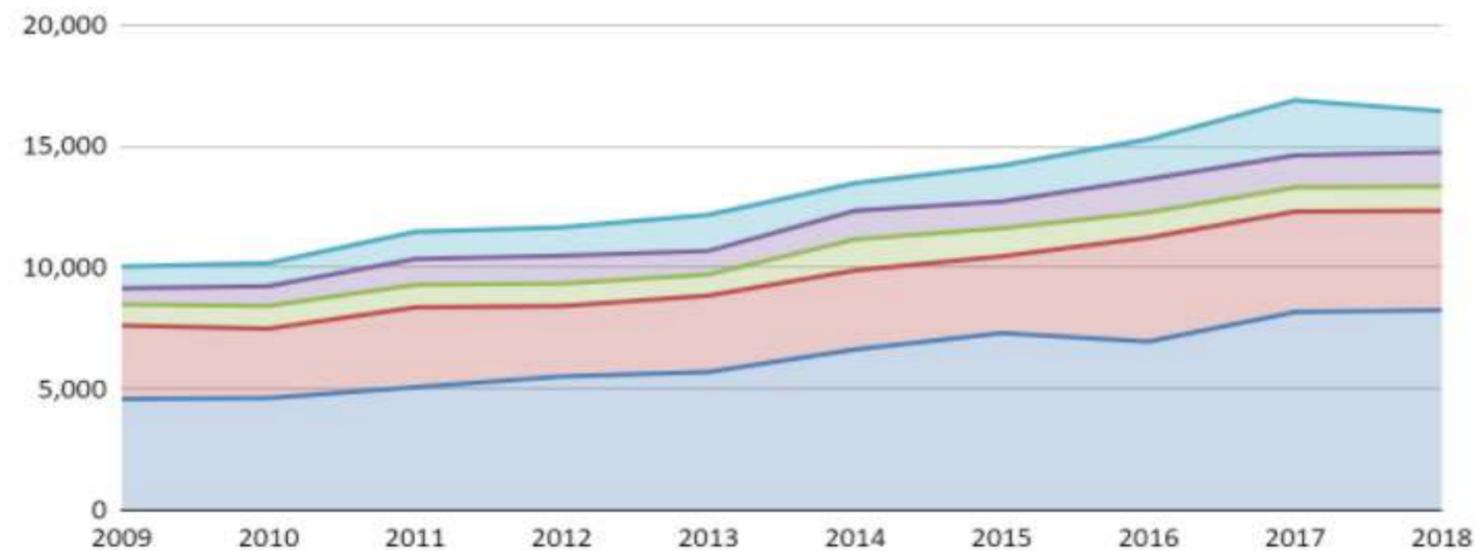


Sample:
€165 million
100+ companies

Source: QSD survey. This chart indicates example companies with a significant business portfolio in the listed vertical

Taxable jobs created: 16,000+

Employment by size, Eurostat data



0 to 1 employee(s)

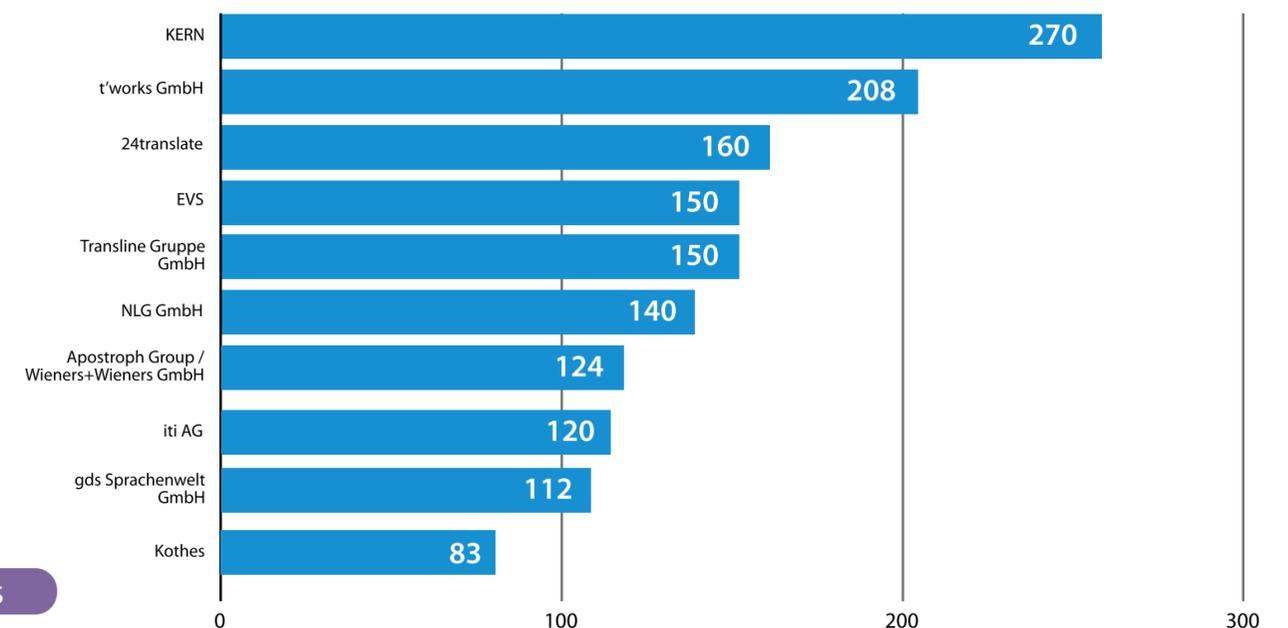
2 to 9 employees

10 to 19 employees

20 to 49 employees

50 to 249 employees

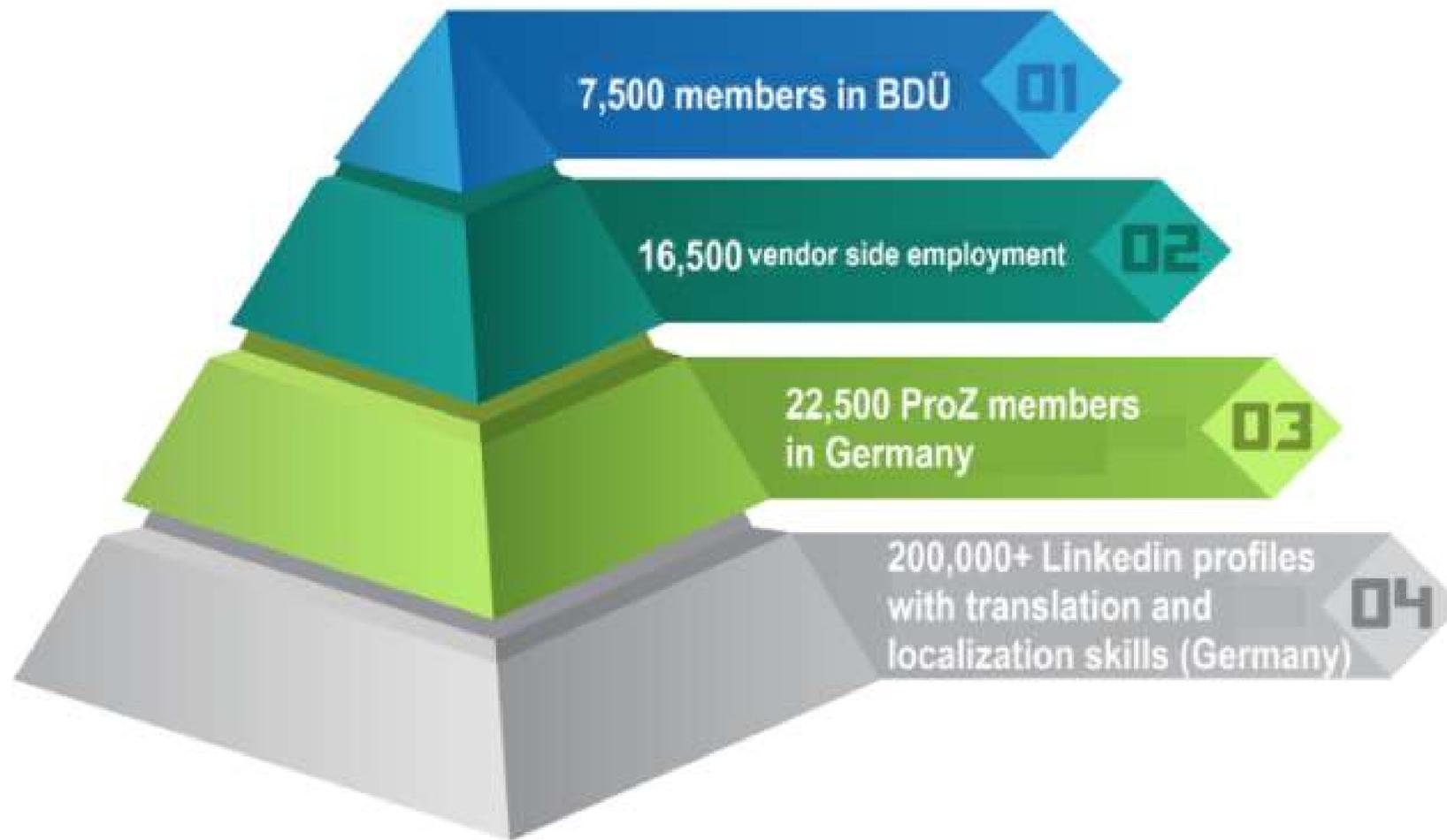
Largest employers, estimated



German translation and interpreting companies employ more than 16,000 professionals. This number has been increasing steadily over the years as the language sector grows in importance and creates more and more jobs. Despite advances in automation, translators have continued to flourish. *There is no sign of AI killing jobs.*

Sector growth feeds thousands of small businesses – and not just a few behemoth enterprises. Over half of the workforce comprise single enterprises, most of which are freelancers. Additionally, close to 5,000 professionals are employed by small companies that have two to nine people on staff.

More than 200,000 language professionals



The 16,000 jobs created by translation companies are just a small part of the whole picture.

Language professionals are employed by enterprises in many different sectors: education, manufacturing, software.

We estimate that there are more than 40,000 people involved in the industry on a regular basis and more than 200,000 professionals in Germany with relevant skills.

Average growth: $\approx 7.1\%$ per year

Sales by company size class, in € million

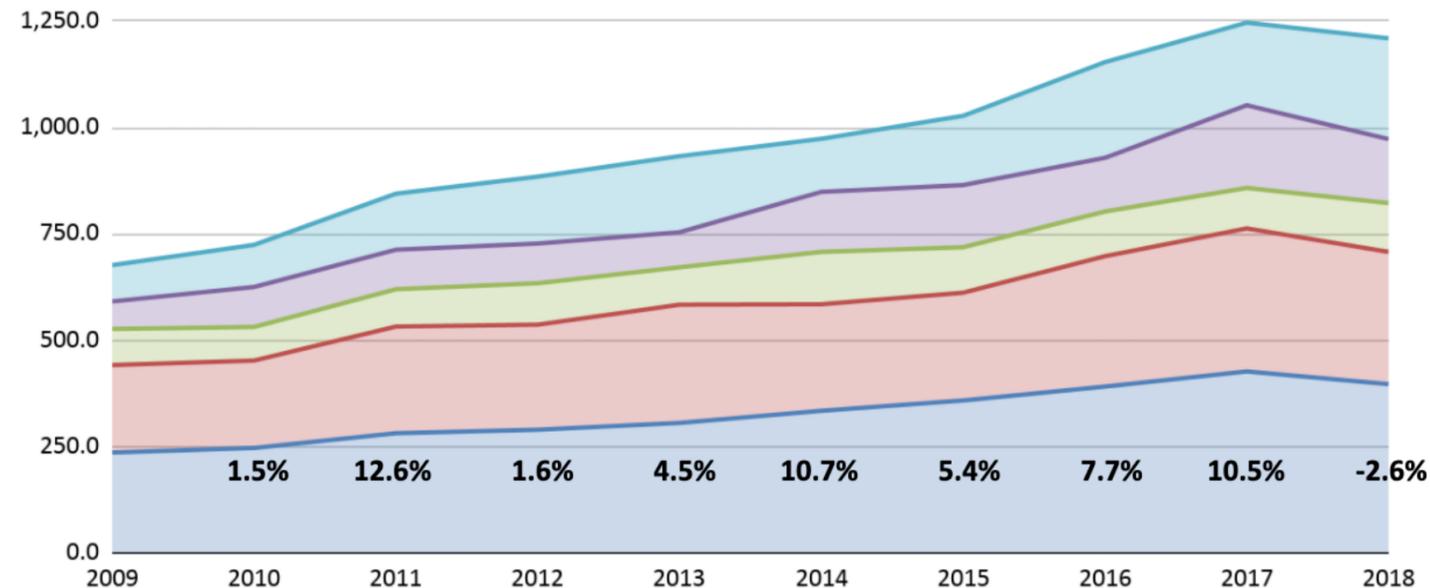
50 to 249 employees

20 to 49 employees

10 to 19 employees

2 to 9 employees

0 to 1 employee(s)



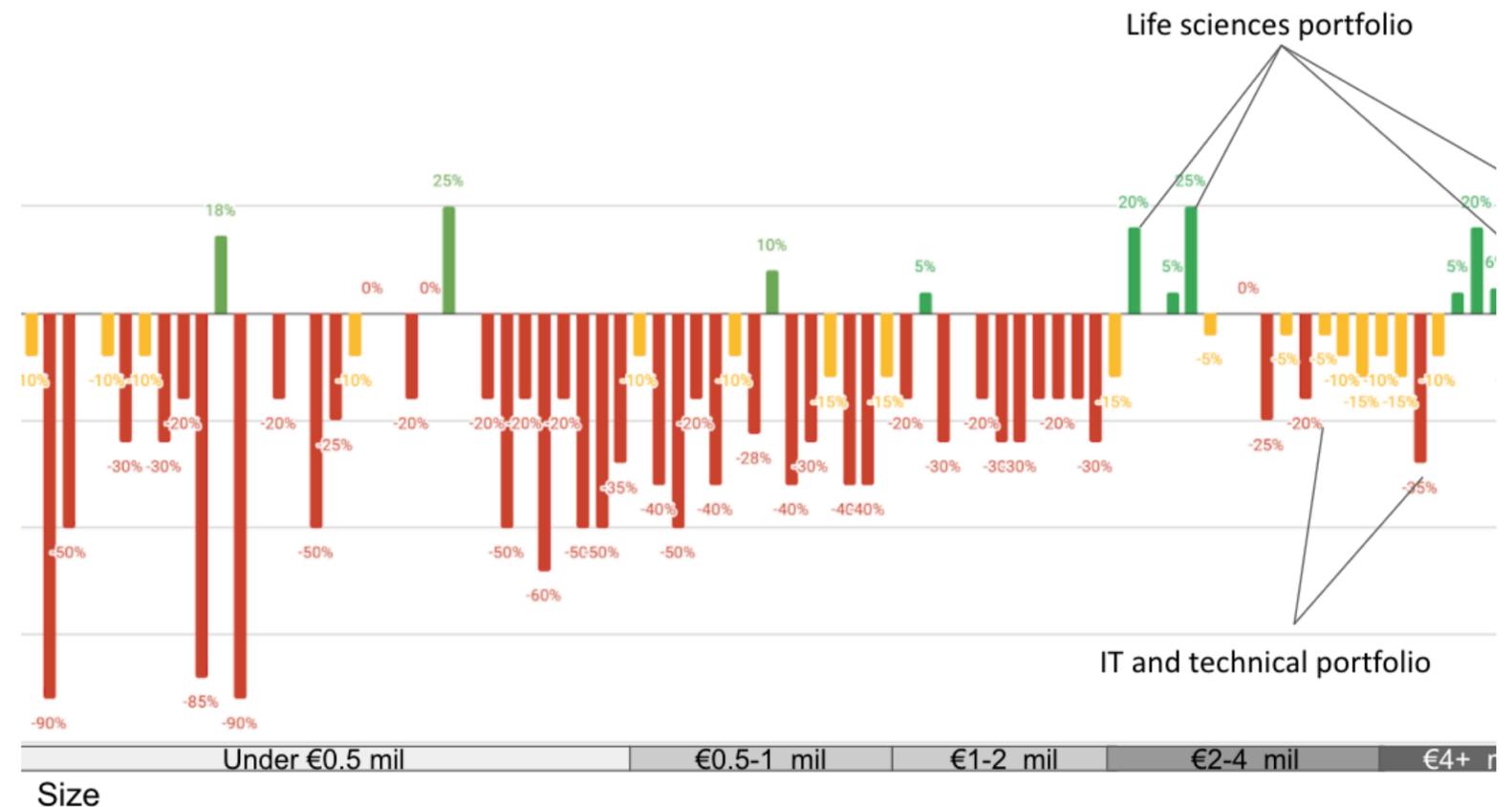
Fiscal data clearly shows strong growth. The market size increased 84% from 2009 to 2017 and has probably doubled over a span of ten years.

Larger firms increased their share of the market over this period of time. Freelancer revenue grew by 68%, and sales at companies with more than 20 employees increased 158%.

Source: Eurostat

COVID impact on language business: -6% growth in 2020

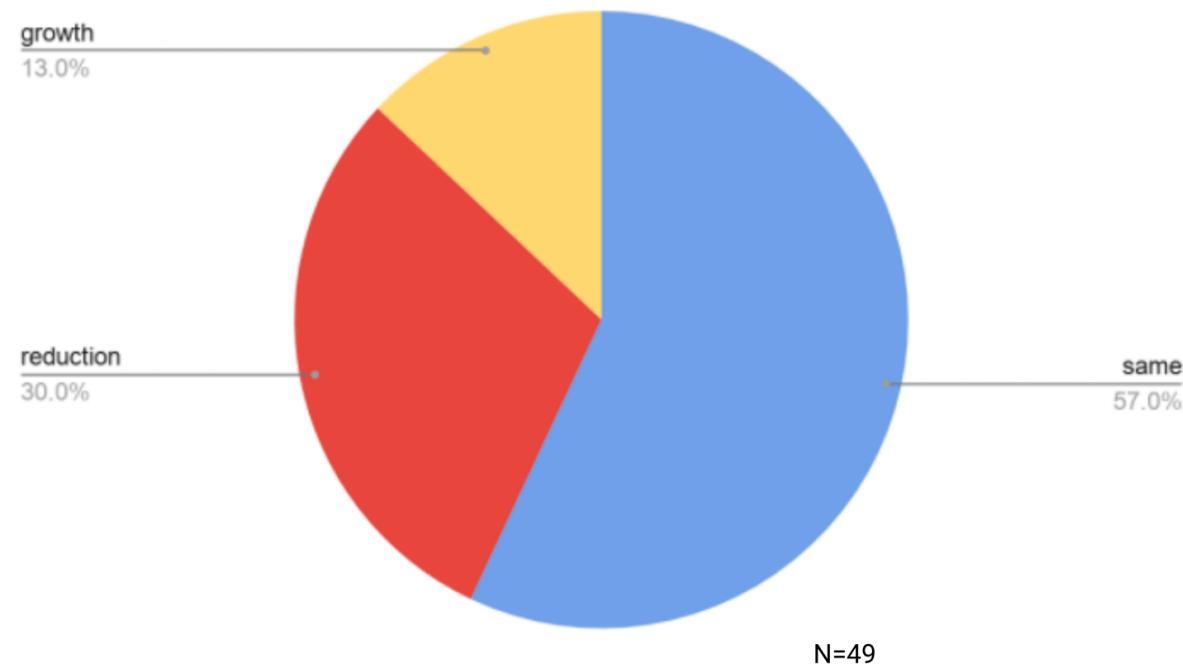
- 6 out of 7 companies experienced a downturn
- Large companies are affected significantly less
- Total volume forecast to drop by only 6%



The COVID epidemic had a strong economic impact. In this chart, each column represents a company and shows the change in sales compared to the prior year (measurement taken in July/August). Different companies were affected to different degrees. Smaller companies experienced severe downturns because small clients cut costs faster. The effect on larger companies on the right end of the chart was muted. Life sciences specialists have experienced growth due to urgent pandemic- and MDR-related work.

Changes in teams

Quantitative changes in LSP teams due to COVID-19



30% of respondents had to reduce teams in the wake of the pandemic

Qualitative changes:

- *The role of MT competence in teams is 20% more important*
- *15% increase in sales and marketing teams to boost falling sales*

Comments from our respondents

“In the case of new hires, we will increasingly look for qualifications in various areas of language technology (MT, AI).”

“Digitization and flexible working models // increasing price pressure and quality standards // tech-savvy corporate culture is extremely important.”

“We’re hiring more and more developers. SaaS development and SaaS sales are playing an increasingly important role.”

“Sales and marketing is a central issue, as well as technology and processes.”

“CAT competence is gaining in importance, especially MT, API, etc.”

Milestones of the German translation industry

- The first LSPs appear

- Intense market development

- Fewer new companies
- More new technologies
- "New-generation" LSPs
- Investors are coming

What's next:
Consolidation
and digital transformation

1969



1978



1982



1990

1994



Trados GmbH

The first Trados prototype is released

2000

2003

2009



The era of machine translation

2010



2013



2017



1976



1980



1986



2002



2004



Bigger cake, more mouths

Enterprises with ...	2009	2018	Growth
50 to 249 employees	12	19	58.3%
20 to 49 employees	21	43	104.8%
10 to 19 employees	63	76	20.6%
2 to 9 employees	1,012	1,516	49.8%
0 to 1 employee(s)	4,583	8,234	79.7%



On average, there are 61 more companies and 402 more registered freelancers every year.

Cumulative sales increased slightly faster than the number of registered providers over ten years.

This means that opportunities in language services in Germany have been growing.

Data: Eurostat

The actors

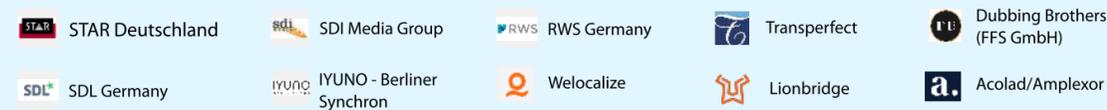
German language service providers

segment size

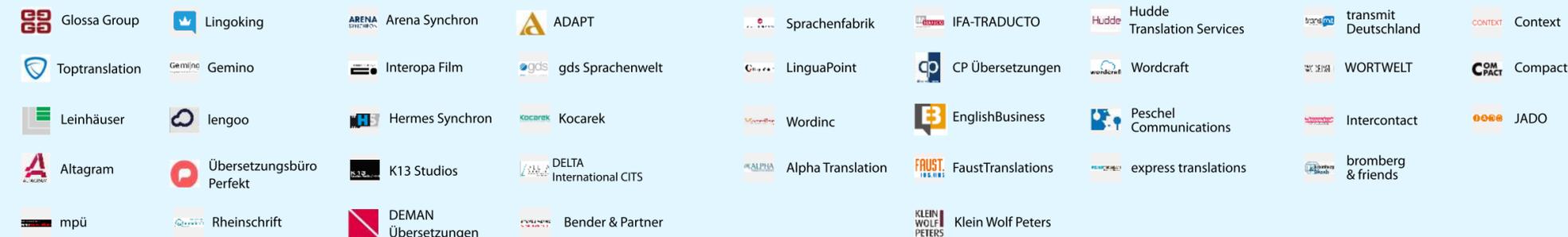
Top-grossing national players €225 mn



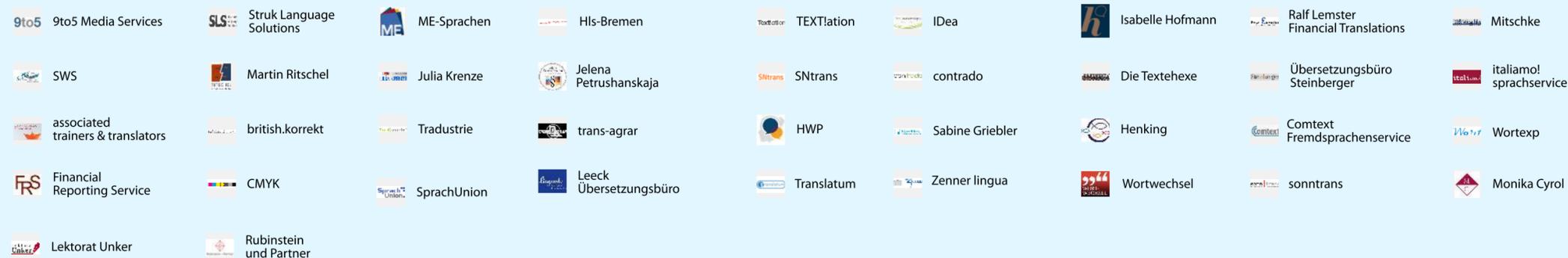
Global MLV presence €275 mn



Mittelstand €300 mn



SMEs and individual professionals €450 mn, 8,000+ entities



Polycentric

The German market is unique in its level of fragmentation.

In France and the Nordics, waves of investment, mergers and acquisitions, and the consolidation processes have created huge language companies in the €100 million revenue range such as Semantix and Acolad. Many medium-sized private companies have been acquired, creating a vacuum in the middle. Represented graphically, France and the Nordics look like an hourglass. These markets are waiting for new medium-sized companies to rise from the bottom, seize the initiative, and take on the establishment.

The market in Germany remains a strong pyramid. At the top are the largest local companies, such as Kern AG, t'works, and Wieners+Wieners. Next up, the local branches of foreign translation companies, which we call MLVs (multilingual vendors). Together, these two groups make up 40% of the market. Then come a few hundred medium-sized companies, the Mittelstand, the micro-enterprises, and the more than 8,000 freelancers. They still generate the majority of business.

Ripe for a daring investor

The future of this structure is clear: private equity will definitely seize the opportunity to consolidate and stitch together a behemoth German translation company that will be able to compete for the leading spots in the global industry Top 100. MLVs will want to acquire top locals; top locals will want to get the Mittelstand first.

German companies in the €8 to 20 million range that remain in private hands face a choice: they can join the race and try to reach €30 to 50 million by acquiring smaller players and then selling them at a better price. Or, they can remain lifestyle companies and be gradually eclipsed by more daring and aggressive competitors.

Prominent competitors

“Who do you consider to be your main local competitors?
Please indicate strong German companies in your niche and region.”

22 mentions	Kern AG
8 mentions	Wieners & Wieners
7 mentions	Lionbridge
5 mentions	Linguaworld
4 mentions	Inlingua, ITL, mt-g, Transline, TSD
3 mentions	EVS, Transperfect, Acolad & Amplexor
2 mentions	24Translate, Alpatrad, beo, Leinhauser, Rheinschrift, SDL, Toling, Tradex
1 mention	46 different companies

We asked business owners to indicate companies that they consider to be their most prominent competitors.

Kern AG was the first company that came to mind of entrepreneurs. Obviously, active promotional campaigns and sales activity generated a lot of publicity for the largest national player.

Perceptions can also be fickle. In the medical field, mt-g is perceived as a competitor more often than NLG despite the fact that NLG is 50% larger.

Tradition: companies that span generations

ENSSNER ZEITGEIST



Hanns Enssner



Christian Enssner

The translation profession in the Western world dates back 2,300 years to the first major Bible translation. However, the language industry with scalable companies is only 30 to 50 years old. In this stretch of time, Germany has given the world simultaneous interpreting, the first big professional software, the biggest European machine translation provider, and, finally, a few translation companies with such strong family tradition that they have been handed over generation after generation. We are proud to present the stories of two such companies.

Enssner

Enssner translation service in Schweinfurt was founded by Hanns Enssner (Dipl.-Ing., England) in 1946. Due to the company's proximity to industry in Schweinfurt, the orientation towards technical-scientific translation was a given very early on. When the demand for Eastern European languages increased enormously in the early 1990s, the range of services was expanded significantly.

MPÜ GmbH



Heidi Schmid



Kevin Schmid

The second generation of the family business was represented by Elfriede Enssner and her husband; in 1996 their son Christian Enssner took over the management. The company is now managed as a medium-sized company and has been a sister company of the t'works Group since 2018 – a large international language service provider with around 150 in-house translators at ten language hubs in Berlin, Leipzig, Landshut/Geisenhausen, Sheffield, Edinburgh, Mulhouse, Lyon, Utrecht, Verona, and Toronto.

MPÜ

mpü (short for medical and pharmaceutical translations) was founded by Heidi Schmid in 1980 as the first language service provider specializing in medical technology, medicine, pharmaceuticals, and chemistry. Heidi Schmid used to work as a translator in the clinical research department of Merckle/Ratiopharm where she encountered low-quality translations from different LSPs on a daily basis. This motivated her to establish a specialist company.

mpü has weathered a number of storms over the years, with the number of staff going up and down accordingly. To ensure that the company would meet the challenges of a digital future with youthful energy, while adhering to the existing principles, Heidi Schmid passed on operations in 2016, and executive management to her son Kevin in 2020. mpü's partner company orangeglobal (orangeglobal medical globalisation GmbH) was established in 2005 to supplement the services offered with experts in the field of regulatory affairs.

Who's who: the largest companies



€55*

Kern AG

Kern family: Michael, Birte, Manfred and Dr. Thomas Kern

Generalist company with a large network.



€28

Apostroph Group/ Wieners+Wieners

Ulrich Barnewitz, Philipp Meier

*Build-and-buy group with a focus on marketing **backed** by ECM Equity Capital Management.*



€18

NLG

Michael Oettli

Private medical device translation specialist focused on a small number of customers.



€17

t'works

Christian Enssner

*An alliance of LSPs, including Wohanka, Obermaier & Kollegen, Ü-Werk, Enssner Zeitgeist, and text&form; **backed** by AUCTUS Capital Partners.*

* Company sales figures: Public data for 2019, million euros, rounded up

Who's who: the largest companies



Transline Group

Dr. Wolfgang Sturz

*Build-and-buy group
backed by Lead Equities
(Vienna).*



ITL AG

**Dipl.-Vw. Christine
Wallin-Felkner**

*Technical documentation
specialists.*



24translate

**Marc-Christian Wolf
and Lone Wolf**

*Financial documentation
specialists with the
technology arm,
24technology.*



mt-g

**Andreas und Gerlinde
Bendig**

*Life sciences translation
specialists.*

Turnover: Public data for 2019, rounded up

The challengers

Business size: sales per year estimated in the €4–6 million range



lengoo

Alexander Gigga

*Machine translation,
post-editing*

€6 million in funding



Altagram

Marie Amigues

Game localization

EU funding of €1.7
million for a PM platform



Toptranslation

Houman Gieleky

*LSP transitioning to a product
company (terminology)*

€2 million in funding
(angel rounds)

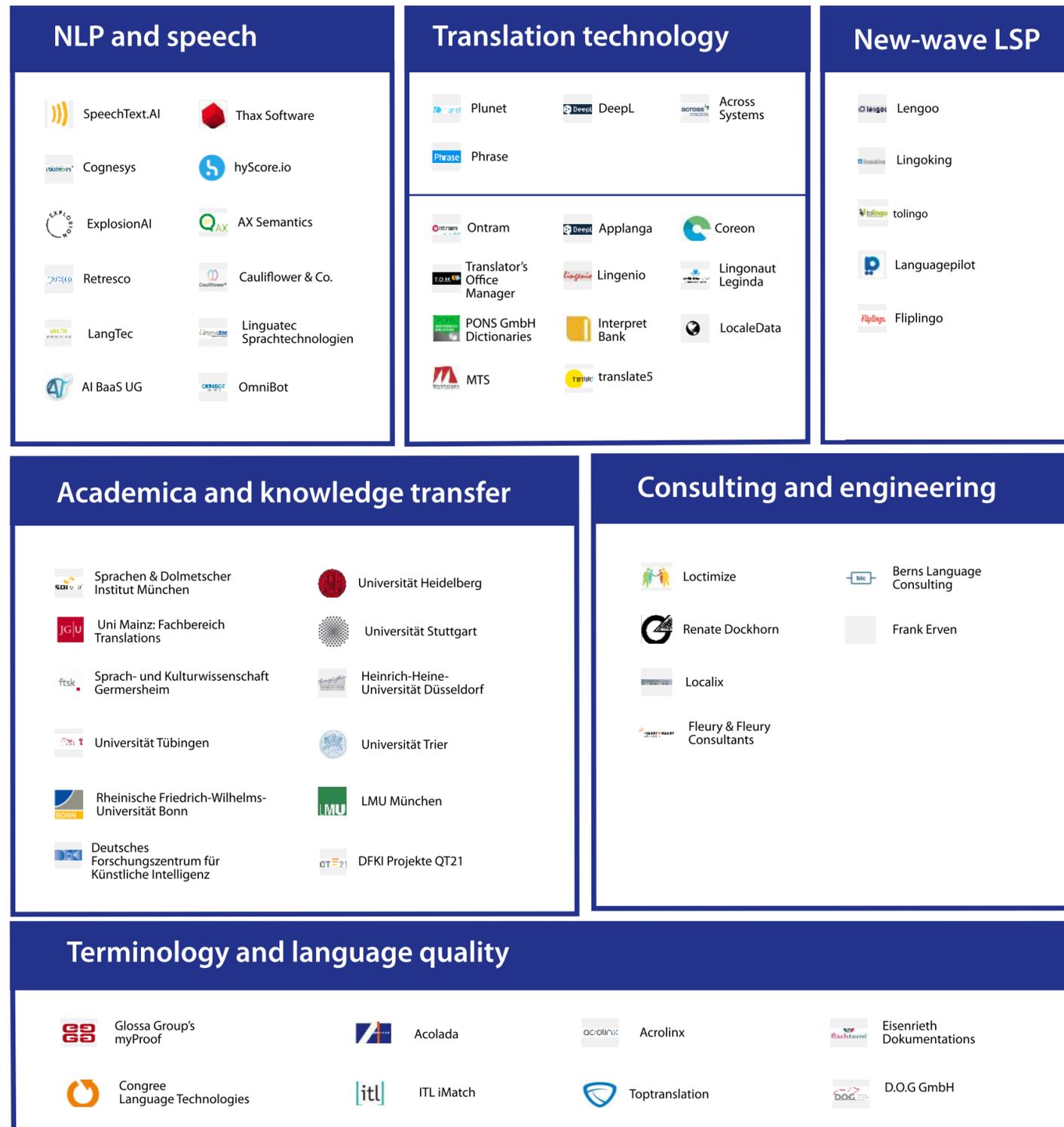
The revenue leaders in Germany are more than 15 years old, and the largest company, Kern AG, was founded 50 years ago.

So, what about the next generation of business leaders? Can younger people still break through to the top of the industry?

Capital flow into language services have opened up new possibilities for an emerging cohort of entrepreneurs. We have identified three companies that are growing, have received funding for technology, and are now trying to take on the “old guard.”

Battlefield: technology

Technology and knowledge-transfer cluster



The translation technology sector in Germany has produced some of the most popular tools in the world: Trados, Plunet, Acrolinx, DeepL, and so on. It creates more than 1,000 jobs and close to €80 million in sales.

For the translation companies, technology represents a new battlefield. As digital transformation rolls in, the new generation of clients can no longer be swayed by the promise of high quality and many years of experience: they want shiny, new tech.

It is clear that the leader in the next ten years should have a mix of digital prowess and rigorous linguistic expertise. The question is: "What's the right combination?"

German translation companies are hiring dozens of developers and spending millions in search of the answer.

Translation company development efforts

5 developers



1. Customer portal, BMS with connectors
2. Lexeri: terminology management tool

8 developers



1. CRM system
2. Automatic test tool
3. Revision + review tool
4. Terminology tool

8 developers



1. Global translation platform with a customer portal
2. Review system for in-country review
3. Terminology management tool
4. AI-based quality assurance, machine translation, and more

17 developers



1. MS Word-based editing system: docuglobe
2. XML-based editing system: XR
3. Content delivery system: easybrowse
4. Authoring support: authordesk

15 developers



1. Terminology tool
2. Interfaces to online systems
3. Pixel-based length-check time-recording/management tool

10 developers



Termflow: terminology management tool



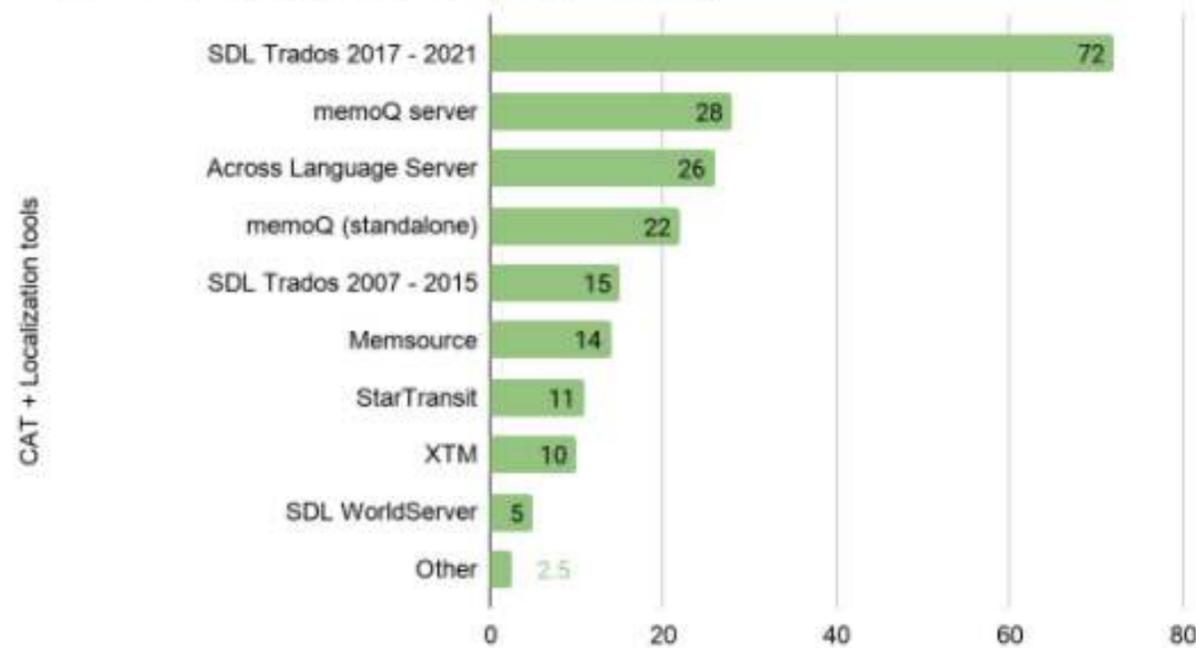
REST API in front of Plunet
SOAP API



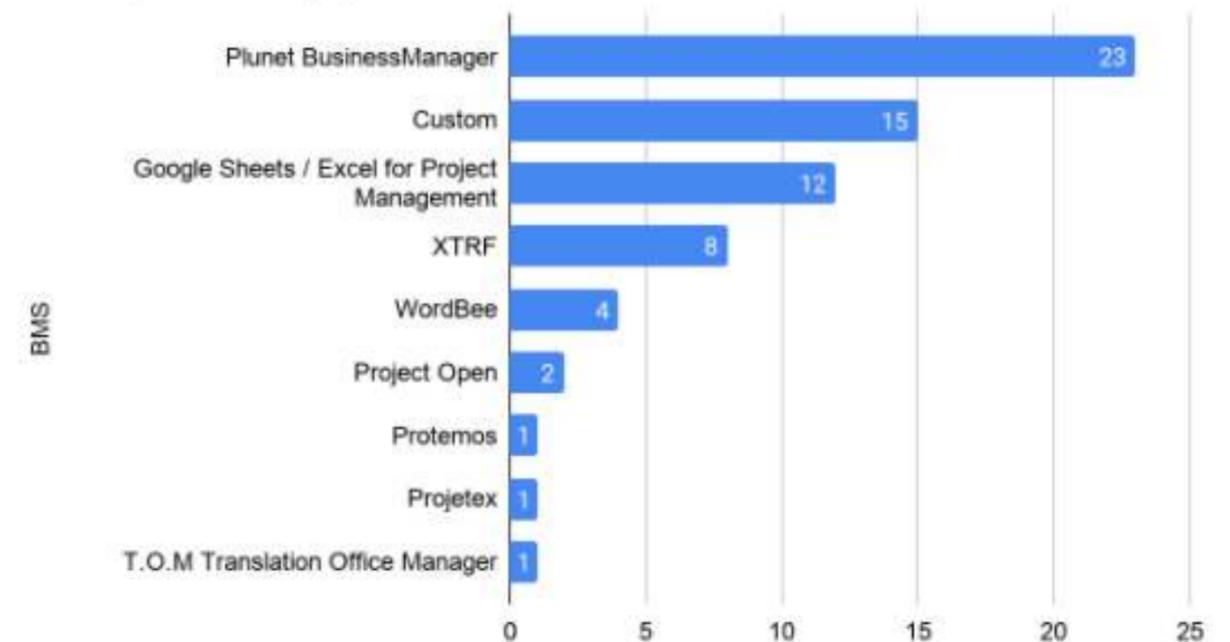
Customer portal (ContentHub)

Technology acquired: “nein” to the cloud

CAT + Localization tools (% of usage)



BMS (% of usage)



Source: QSD survey

German clients are unusually sensitive to data security, which led to low penetration of cloud-based translation tools. The combination of Plunet + SDL, Across, or memoQ remains the most popular solution even in 2020.

Translation companies in Germany are reluctant to adopt cloud tools like Memsource and Smartcat, or localization tools for developers such as Phrase, Transifex, and Crowdin.

An estimated one in five established LSPs use outdated technologies.

Machine translation adoption

Incumbents

Use MTPE in 10 to 20% of projects. This cautious adoption is driven by clients with price/speed requirements.

NLG
Wieners+Wieners
t'works

Subcontractors

Use MTPE in >50% projects, as required by their professional customers.

LinguaPoint
9to5 Media
Services

Disrupters

Offer MTPE as a "packaged" technology, train engines, attack established LSPs via lower rates.

lengoo



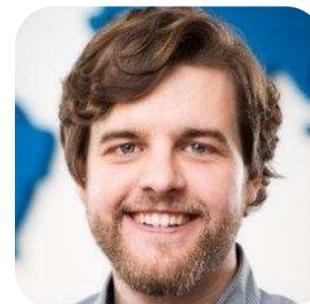
Felix Bingel-Erlenmeyer, Wieners+Wieners GmbH

"Our main business is marketing transcreation. That's why we are careful with machine translation and mainly use it in areas such as technical documentation. Premium and marketing texts are not yet fully suitable for MT."



Petra Dalmus, LinguaPoint GmbH

"Our clients are mainly other translation companies, MLVs. They have driven the transformation towards more than 50% MTPE. They require us to perform post-editing on a growing number of projects, and with success: the quality of the output is getting better."

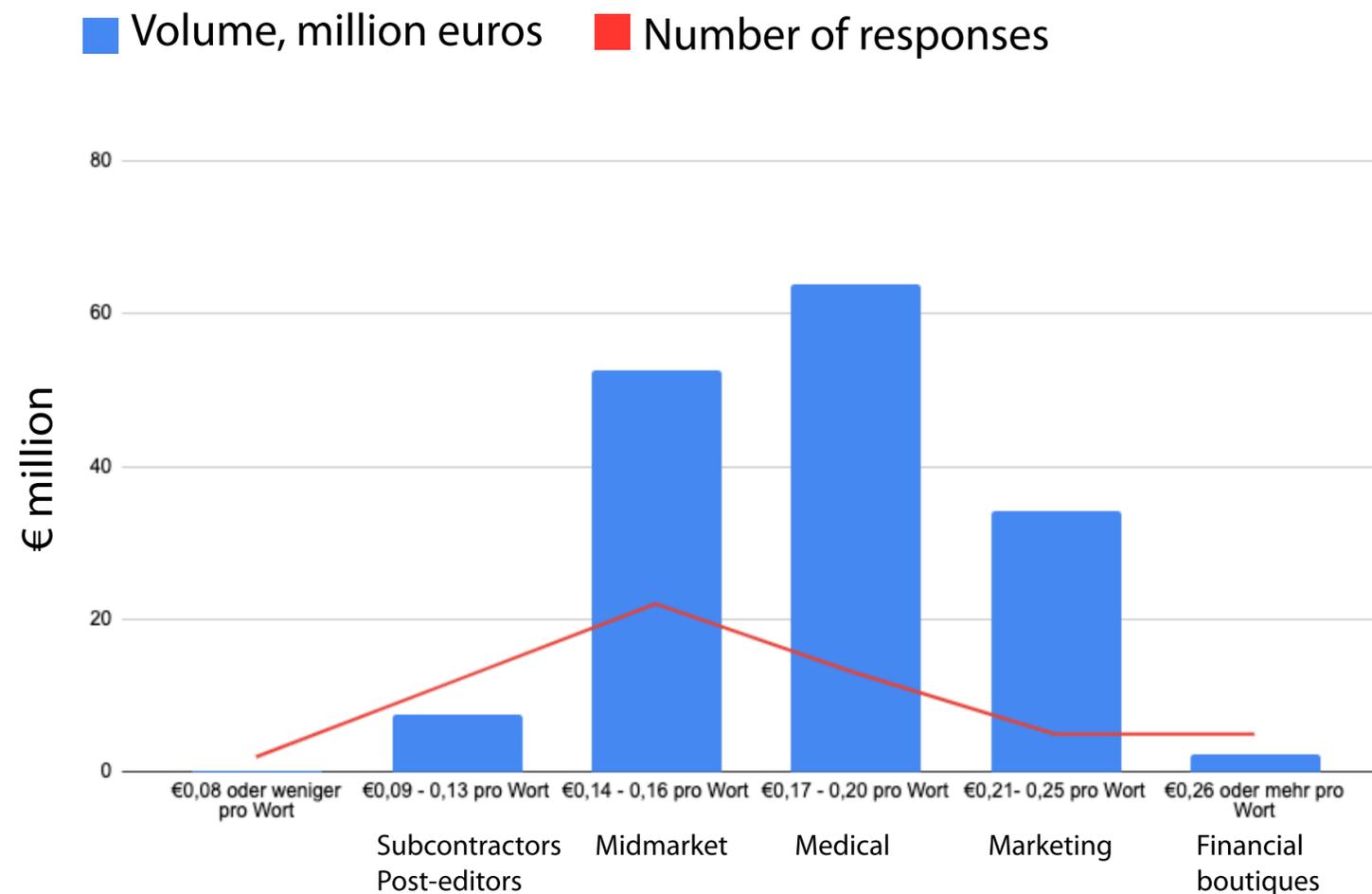


Alexander Gigga, Lengoo GmbH

"We use our clients' data to custom train machine translation engines and a human-in-the-loop process for post-editing. Besides, we have automated the selection process of the best-suited translation engine."

Translation pricing

Price niches: sales in € million and number of players per niche



Source: QSD survey

This graph compares prices for German-to-English technical translations (without editing) against the volume of business generated by companies in the respective price niche.

The finding: although €0.15 per word is most common, €0.17 to €0.20 per word generates the most business. Larger and more established companies price higher than freelancers and charge a premium for reliability and the capacity for quality at scale.

Marketing, legal, and medical translations were priced the highest.

This finding is in line with similar studies conducted in other countries: they show that the price segment just above the mid-market is typically the most lucrative. Lowering rates is not the best strategy to get a high volume of business.

Interpreting pricing

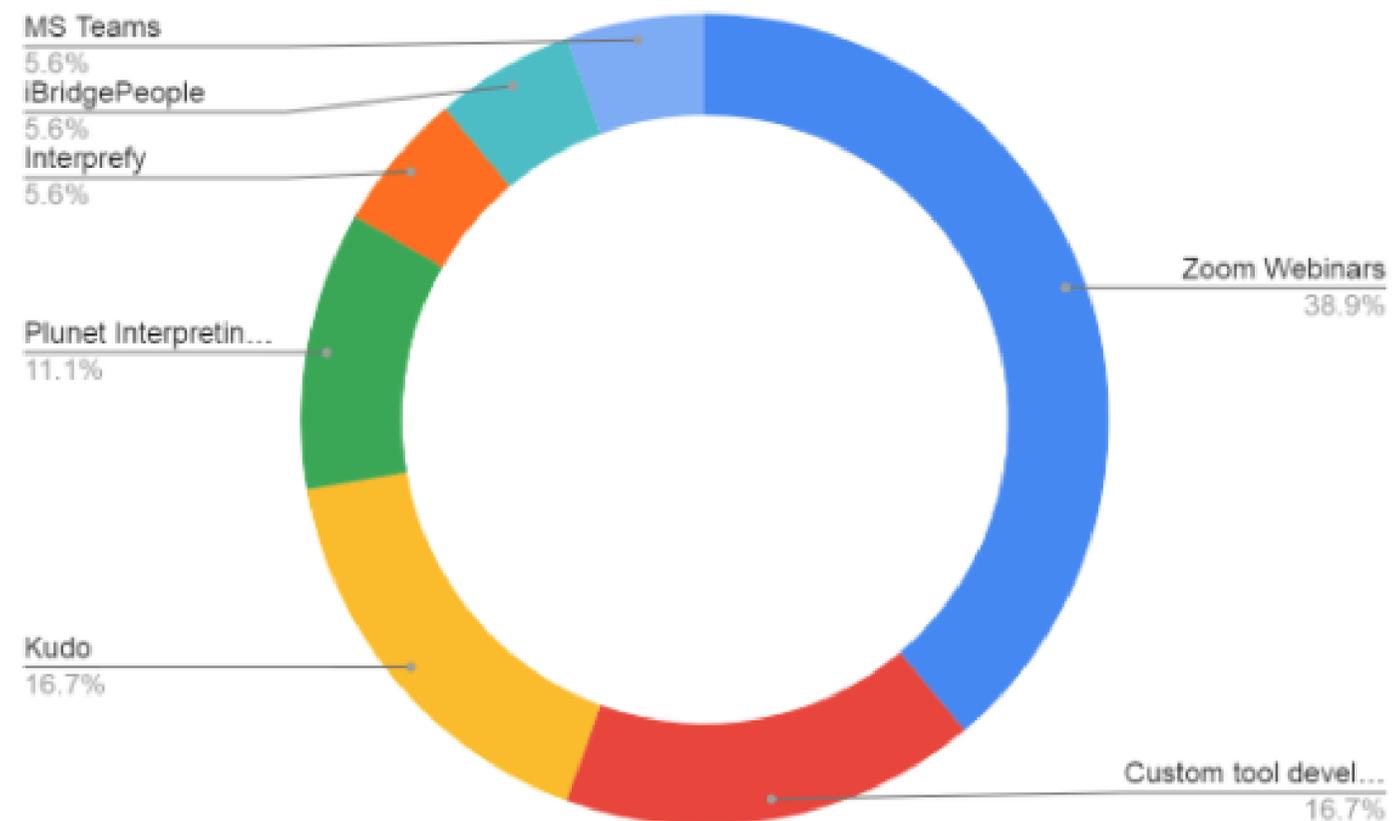
Languages	Western	Asian	Immigration
Medium-sized companies and up, in €			
Conference – per day	800–1,000	850–1,000	800–1,200
Community – per day	800	800–880	800
Telephone – per minute	1.80	2	1.80
Freelancers and micro-companies, in €			
Conference – per day	750–775	870–1,000	900
Community – per day	30–100	N/A	30–70
Telephone – per minute	1	2	1–1.50

Interpreting is a smaller business in Germany compared to the USA and Nordics, and about one in four language companies provide interpreting on a regular basis.

The most common pricing with established companies was €800 to €1,000 per day.

With COVID lockdowns, remote interpreting over the phone and Internet has become more widespread, with similar price levels per day, or around €1.80 to €2 per minute for micro-assignments.

Remote interpreting technology



Unlike Scandinavian or US counterparts, most language companies in Germany do not focus on interpreting services. Interpreting is fragmented and there are no huge UK or Denmark-style public sector frameworks.

Hence only a small number of survey participants reported that they use interpreting technology. Zoom webinars emerged as the most popular technology due to low cost and high accessibility, with KUDO as the second-most popular tool.

When COVID hit, remote interpreting suddenly became important. Interprefy took over the market in Switzerland, where UN institutions switched to online meetings. Interactio embedded themselves in European Commission institutions, while New York became KUDO's stronghold.

However, the German industry probably did not capitalize heavily on the remote interpreting wave.

Running a language business

Revenue per project manager

	Company	Project managers	Est. revenue per PM, thousand € per year
1	NLG GmbH	100	177
2	mt-g medical translation GmbH & Co. KG	57	210
3	Apostroph Group / Wieners+Wieners GmbH	45	622
4	t'works GmbH	45	382
5	Transline Gruppe GmbH	45	382
6	beo Gesellschaft für Sprachen und Technologie mbH	12	666
7	tolingo GmbH	12	666
8	Leinhäuser	25	240
9	Toptranslation GmbH	15	400
10	mpü GmbH	14	214
11	Enssner Zeitgeist Translations GmbH	9	333
12	gds Sprachenwelt GmbH	8	375
13	DEMAN Übersetzungen e.K.	7	428
14	Sprachenfabrik GmbH	7	257
15	Kocarek GmbH	7	400
16	Gemino GmbH	6	550
17	ADAPT Localization Services GmbH	6	500
18	Supertext Deutschland GmbH	6	250
19	DELTA International CITS GmbH	5	600
20	IFA-TRADUCTO GmbH	5	300
21	RKT Übersetzungs- und Dokumentations-GmbH	4	500
22	wordinc GmbH	4	375
23	BENDER & PARTNER Management GmbH	4	375
24	EnglishBusiness	4	375
25	Comtext Fremdsprachenservice GmbH	2	500
26	Rheinschrift Language Services	15	200
27	LinguaPoint GmbH	8	188
28	CP Übersetzungen GbR	8	181

€0.4 million per PM per year

The average revenue per project manager for German companies that work with large direct clients.

€0.15 million per PM per year

Average for Central European LSPs with good automation and average pricing.

€0.18 million per PM per year

Average for companies that primarily work with other LSPs.



Michael Oettli, CEO

The exception at NLG

We do €18 million in sales with 100 project and account managers, and 60 clients. But these are all prime clients: we win in global RFPs. There is a great deal involved with regard to client services, process improvement, etc. More than just processing files for hundreds or thousands of smaller clients. I don't think you can compare what we are doing with any other LSP of a similar size.

Business development teams

	Company	Business development team	Sales in € mn (est.) /number of BDMs
1	Transline Gruppe GmbH		1.0
2	tolingo GmbH		0.5
3	Apostroph Group / Wieners+Wieners GmbH		2.2
4	t'works GmbH		2.2
5	mt-g medical translation GmbH & Co. KG		1.7
6	text&form		1.2
7	Toptranslation GmbH		1.2
8	Leinhäuser Language Services GmbH		1.2
9	Kocarek GmbH		0.8
10	Supertext Deutschland GmbH		0.4
11	EnglishBusiness		0.5
12	beo Gesellschaft für Sprachen und Technologie mbH		4.0
13	mpü GmbH		1.5
14	ADAPT Localization Services GmbH		1.5
15	Gemino GmbH		1.5
16	Rheinschrift Language Services		1.5
17	DELTA International CITS GmbH		1.5
18	Sprachenfabrik GmbH		0.9
19	wordinc GmbH		0.8
20	CP Übersetzungen GbR		0.7

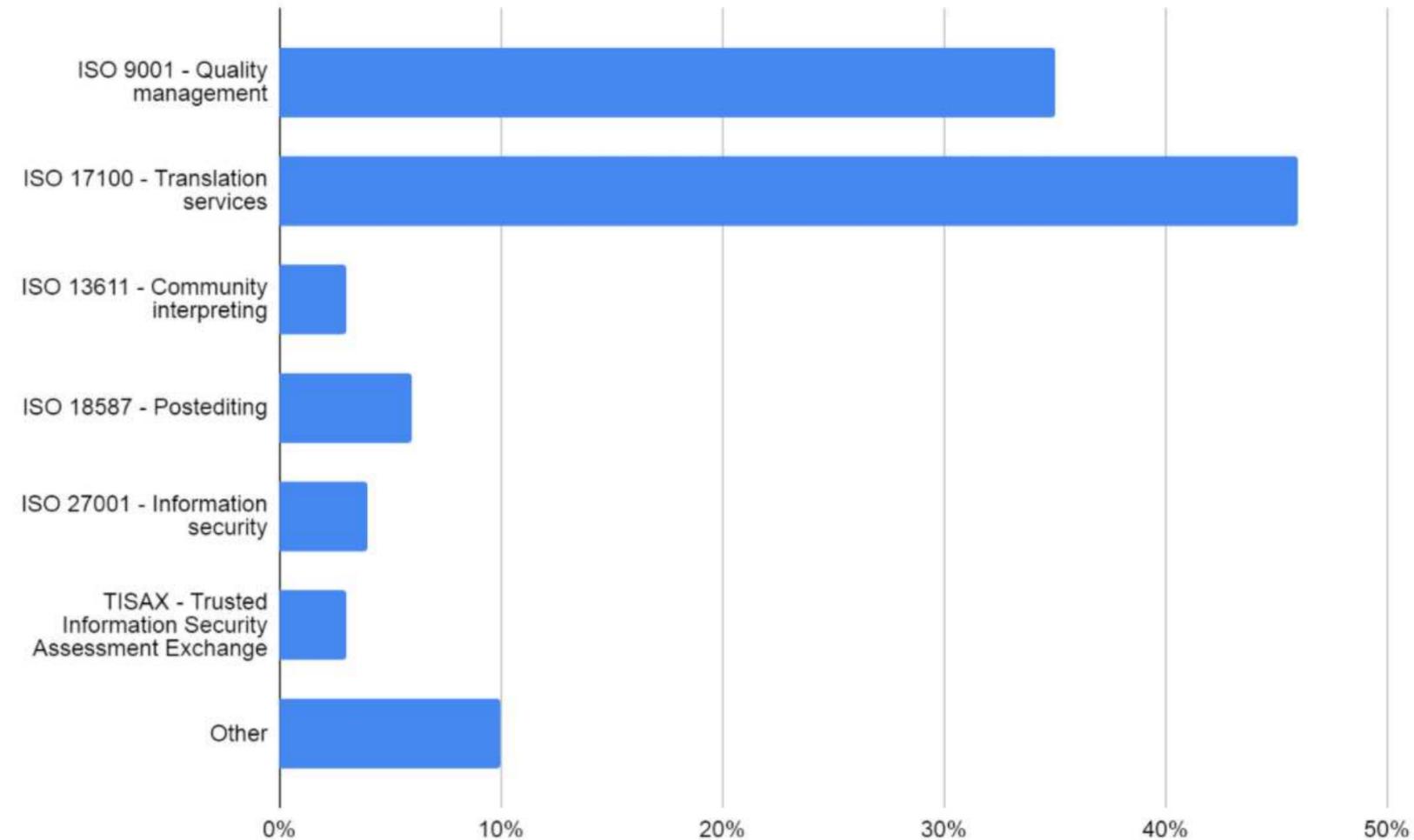
Strategy	Description	Business volume per team member
Attacking	Hire a larger team than is supported by current revenue; build for growth	€0.33–1 million
Balanced	Average market values	€1–2 million
Conservative	Hire fewer people than the current revenue can potentially support	€2–4 million

For this analysis, company business volume was divided by the number of sales and marketing people. The average value was €1.5 million per team member.

The German market is large and fragmented, and it is driven by long-term relationships. It may take years for the salespeople to develop connections with new clients, which makes investment in building business development teams a costly affair.

Transline and tolingo have made an extra effort to build significant business development teams that outstrip most competitors. Market contraction due to COVID may discourage others from following their example.

Certification: ISO and others



Our survey has identified 45% participants certified according to ISO standards, which is a very high percentage, significantly higher than in other geographies. The most popular certification to go for was ISO 17100 Translation services recognized by industry specialists.

Community interpreting and post-editing standards from ISO had low market penetration. It is likely that they are not often required in important RFPs.

Five companies were certified according to information security standards ISO 27001 and TISAX, typically required of software firms.

Among the “other” types of certification the most important was ISO 13485 Medical Devices.

Company profiles

Meet XTRF

Hi, we're XTRF. We provide software as a service that streamlines and improves the translation and localization process.

We work with hundreds of clients worldwide, from language service providers large and small, to organizations of all shapes with in-house translation and localization teams.

Our Translation Management System uses automation and industry expertise to help our clients work smarter not harder. We integrate with a range of external systems, from accounting systems, to CAT tools, and other third-party applications so you can benefit from the very best specialist tool



Three intuitive portals

The system is centered around three portals: one for each of your key audiences.

The Home Portal is the hub for your internal staff – project managers, vendor managers, sales staff, and the CEO. It makes project management quick and easy thanks to automation. It also includes dashboards and reporting so you're clued into what's happening in your business.

Then there's **the Vendor Portal**. This is where your vendors or suppliers login: your translators, localizers, and proofreaders. They can easily create and send off invoices, edit availability, and access files and job details.

Last but by no means least, there's **the Client Portal**. This allows your clients to quickly and easily request a quote, check project status, see billing information, and ask any questions they may have, reducing reliance on your team.

New features added all the time

We're constantly developing our system. We're regularly adding extra functionalities or features, enhancing current ones, and fixing any issues. A few excellent examples of recent developments are Business Barometer and XTRF Chat.

Business Barometer is a business intelligence tool. It allows you to easily identify trend and act on them quickly. Analyze your quote acceptance rate, profitability, language pairs, specializations, and value of client work – and, crucially, assess how this has changed over time.

XTRF Chat is our new means of project communication. It creates chat rooms for project teams to easily communicate and share files. All conversations are stored within a project, so finding what you need is a piece of cake.

Sound good?

Get in touch with sales@xtrf.eu to request a demo or book a call.

Translation and localization – gateway to the Baltics and Nordics

Language is a powerful tool. Our professional team of in-house linguists, editors, and project managers are ready to take care of your translations into Baltic and Nordic languages across 10+ industries. [Learn more](#)

Multilingual chatbots – new customer support experience

Deliver a new customer support experience with the Tilde.AI conversational AI platform. Introduce multilingual chatbots with cutting-edge natural language understanding capability, helping your customers across borders and communication channels. [Learn more](#)

Machine Translation – translate more and faster

Tilde machine translation can help LSPs increase their productivity and keep up with growing translation volumes. NMT systems examine the full context of a sentence, producing high-quality translations that are almost humanlike in style. Instead of competing with a human translator, MT augments them. [Learn more](#)

Trusted partner for the European Commission

Tilde is a trusted technology partner for the European Commission and has built a neural machine translation system for the Presidency of the Council of European Union since 2015 supporting presidencies in Latvia, Estonia, Bulgaria, Austria, Romania, Finland, Croatia and right now in Germany. [Learn more](#)



Communication beyond language powered by Tilde

Tilde provides world-class human and machine translation and drives innovation in European language technologies to support languages in the digital age.

Get in touch with translations@tilde.com to get started and meanwhile follow us on social media for the latest language tech insights





**The answer you need to create
competitive global content.**

t'works: Language services from one provider

The world is changing. Global megatrends shape innovations, economies, education, research, and companies. The t'works group of companies is facing up to this change with its highly flexible, individual, and complex language services. Expert teams of in-house translators, proofreaders, and project managers ensure proximity to international target markets.

For several decades, the international t'works group of companies has been providing translations and other language services in all languages, as well as handling all aspects of translation management: specialized translation, localization, marketing, transcreation, machine translation, foreign language layout/DTP, glossary/terminology management, and the coordination of processes with proofreaders and local companies.

Despite its size, the t'works group has a decentralized organizational structure and thus unbureaucratic internal decision-making processes. Subsidiaries of the group have ten language hubs of their own in Berlin, Leipzig, Landshut/Geisenhausen, Sheffield, Edinburgh, Mulhouse, Lyon, Utrecht, Verona, and Toronto as well as 16 strategic translation partners at a further 20 locations worldwide.

In addition to translations, the services also include adaptation and localization of software, UI/HMI, websites, apps, and media (voice-over and on-screen text). In the area of machine translation, the interaction between NMT, translation memories, and term databases enables optimal translation results while reducing costs and workload.

The international glossary/terminology management service includes the extraction, administration, and maintenance of multilingual termbases and glossaries, enabling more consistent, faster, and ultimately cheaper translations. In the area of interpreting, we provide the appropriate equipment, online and offline, and if necessary, also publicly ordered/sworn interpreters. Many years of experience enable targeted consulting and training in translation management, intercultural communication, and market positioning.

Christian Enssner, the managing director of t'works GmbH, looks forward to the future challenges of a constantly evolving, demanding international language service market.

The right term for
translation



Why memoQ?

MEMOQ is a **leading collaborative translation environment and TMS delivering premium solution** to the translation industry since 2004. Today, with almost 100 employees, memoQ works hard to continuously improve the software with careful consideration of user needs. The company is dedicated to delivering innovation through diverse developments that today help hundreds of thousands of freelance translators, translation companies, and enterprises worldwide.

Having both simplicity and effective translation processes in mind, memoQ combines ease of use, collaboration, interoperability, and leverage in the following solutions:

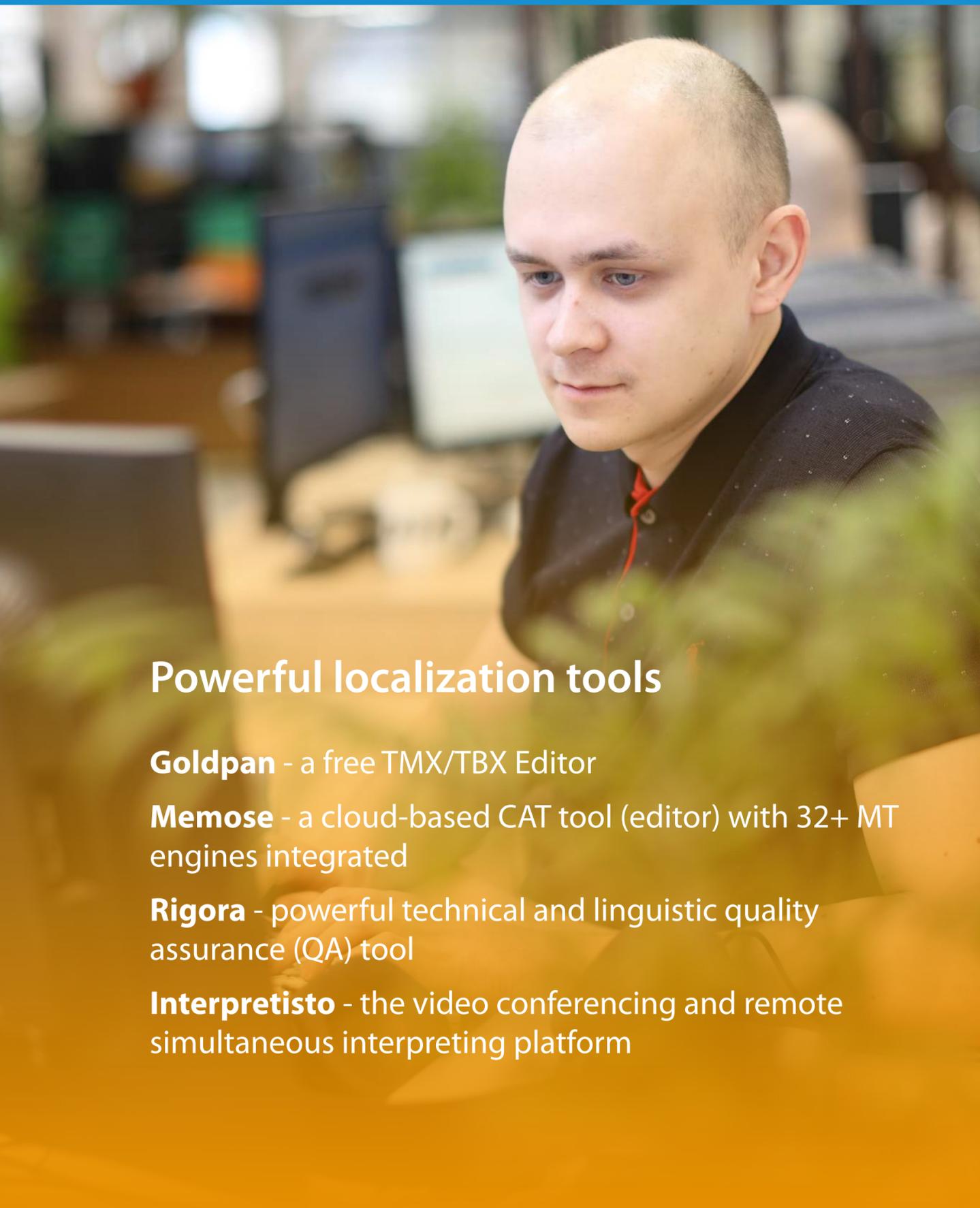
MEMOQ SERVER is the translation management system of **choice of enterprises and translation companies** all over the world to manage and automate localization processes that enable their global presence. memoQ server empowers enterprises by allowing them to run multilingual localization processes in a fully centralized and automated environment.

MEMOQ CLOUD: cutting-edge translation management in the Cloud, designed for small translation teams. memoQ's cloud server is scalable and has been designed to provide a quick and powerful solution not only to companies but also to ad hoc teams of translators.

MEMOQ TRANSLATOR PRO is a **computer-assisted translation environment tool**. It was designed by translators for translators and it increases productivity and quality for all those who perform, edit and review translations.

WWW.MEMOQ.COM





Powerful localization tools

Goldpan - a free TMX/TBX Editor

Memose - a cloud-based CAT tool (editor) with 32+ MT engines integrated

Rigora - powerful technical and linguistic quality assurance (QA) tool

Interpretisto - the video conferencing and remote simultaneous interpreting platform

Logrus Global - Translation and IT Company

We have a quarter century of experience as a powerhouse in globalization for the world's most demanding multinationals along with national leaders, midsize firms, and start-ups. The Logrus Global team has a reputation for completing seemingly impossible projects. With a broad command of technologies, we deliver outstanding language quality and superior service. Our human experts and high-quality translators and editors use the most innovative tools. Human translation quality is our imperative.

We love collaboration and work with many our industry colleagues. The software developers and engineers at Logrus Global have the knowledge, experience, and tools with which to solve all kinds of technical problems. That's why our clients trust us for the delivery of expansive projects even under challenging time constraints. Our partners are as resilient, scalable, and reliable as we are.

Logrus Global is certified for compliance with the ISO 17100, ISO 18587, and ISO 9001 standards.

For more information, visit <https://logrusglobal.com/>

Logrus Global Localization Cloud

Logrus Global Localization Cloud is a family of cloud and desktop tools and services for the translation industry built on interoperability, open standards and formats, security, and feature augmentation.

The tool set boosts productivity and reduces costs thanks to its ability to augment, optimize, and streamline virtually any localization and translation process or system. All the tools can be deployed, configured, and used individually on the company's intranet to meet the highest corporate security requirements.

For more information, visit <https://cloud.logrusglobal.com/>



LBS Suite, your lifetime Translation Business Management System.

LBS Suite, edited by Language Business Solutions, is a powerful Translation Business Management System (TBMS) optimizing your workflow by offering a high degree of automation and elevated customization to fit your needs.

Founded in 2002, Language Business Solutions initially created a TBMS, LBS Suite, to fit the needs of a translation company. In 2007, the decision to sell LBS Suite to the entire French market was taken. Very quickly, LBS Suite turns leader of TBMS in France. Over time, it increasingly adapted to the requirements of its clients. Among them, a company which became a European leader, asked for in-depth developments that made LBS Suite a complete and powerful tool for translation companies. Hence, the tool is now a high-performance and professional TBMS, gathering all CRM and ERP functionalities needed to run a translation business. Since 2018, LBS started to expand all over the world.

LBS Suite is a strong Translation Business Management System (TBMS) that will significantly help you to improve your daily workflow. The tool presents a high degree of automation and customization to fit your needs. Furthermore, with its Development Partnership program, our clients find their own development needs in the new releases of LBS Suite.

Additional modules are available to enhance your system.

On top of all features offered in the main module, you can add modules depending on your needs, making LBS Suite suitable for your organization. Several modules are available such as quality, client portal, supplier portal, digital marketing, CAT tool full integration, Outlook or Gmail integration... Please contact us to know more.

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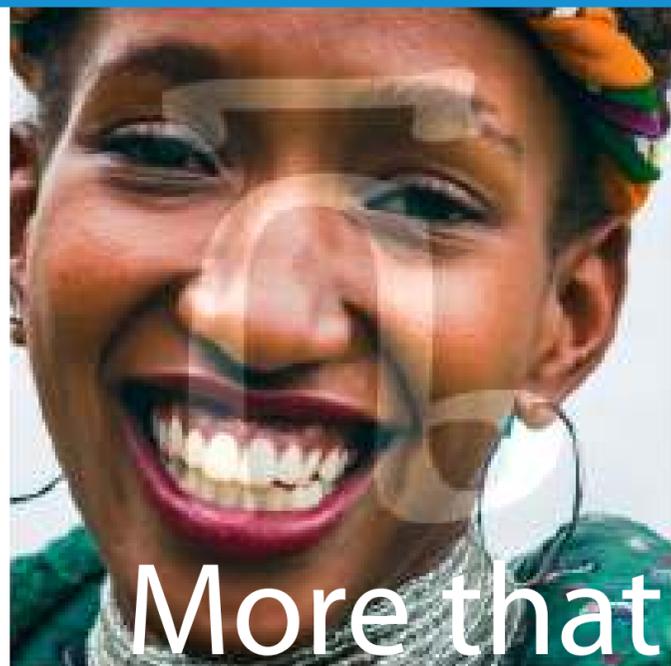
**Michaela Gorisch |
Managing Director**

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More than words

GaiaText ⚡ was founded in 1988 and is a full-service agency for translation services in the premium sector: Transcreation, reformulation and language quality is what we strive for.

We work fast, faultlessly and digitally safe. We meet (almost) every deadline requirement, are trustworthy, highly motivated and client-orientated.

Our pricing is fair, flexible and transparent.

We offer translations in all language combinations.

We are particularly competent in the fields of public relations and marketing, fashion and lifestyle, IT and technology, economics and finance as well as medicine, law, tourism and sport.



Values

Trust, sustainability, responsibility, respect, mutual support, willingness to cooperate, fairness, generosity, reliability guarantee a successful business relationship.

In proactive dialogue with our clients, we implement shared projects on the basis of these values in an intelligent, speedy, concentrated and friendly manner that ensures best results.



Quality

Premium brands manufacture high-quality products, and they know that the quality of the language in which they communicate internally and externally should reflect this.

That's why blue chip brands like Alessi, bulthaup, Gant, Lacoste, Timberland, Vacheron Constantin and many others have been working with us for many years – safe in the knowledge they are in expert hands.

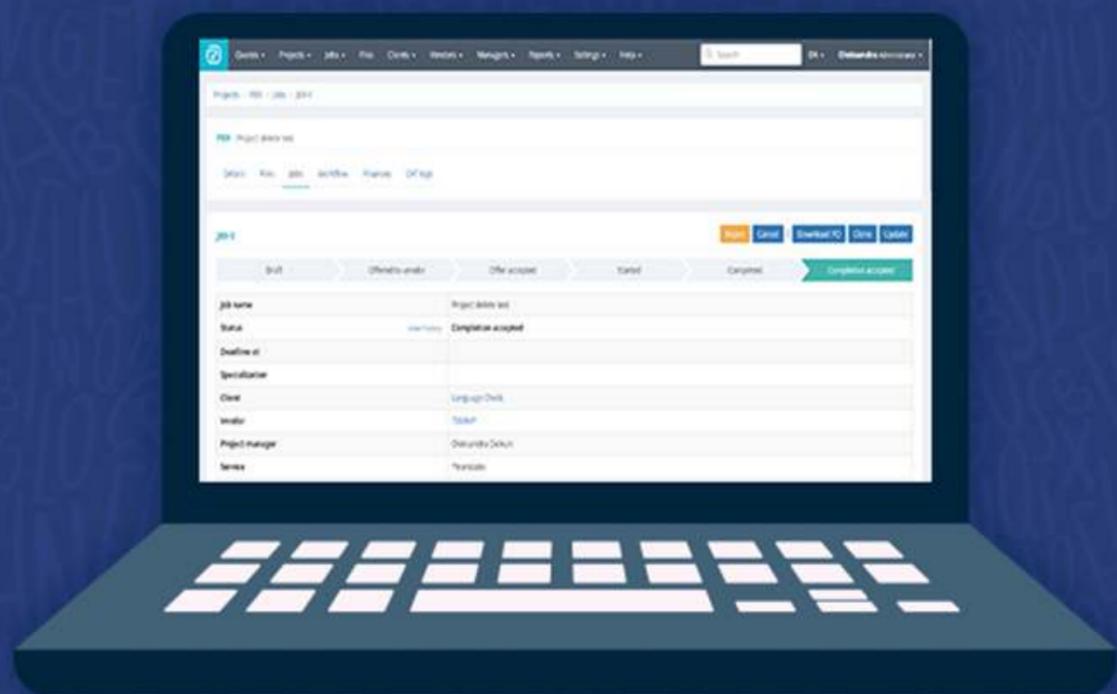
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Clients management

Contacts, agreements, prices, proposals, client portal etc.

Project management

Files, deadlines, assigning jobs to linguists, project finances

Vendor portal

Your linguists can login, accept and deliver jobs

Automated project workflows

Automatic assigning jobs to the first claimer, starting proofreader's job after translator's delivery etc.

Finance management

Recording POs, issuing and accepting invoices, tracking payments etc.

Business reports

Monthly turnover/profit in general and by clients/project managers/services/languages etc.

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Premium company profile

Klein Wolf Peters GmbH is focused on providing language services that are built on human intelligence.

Our employees have a journalistic writing style, inquisitive minds, and a solid grounding in copywriting, editing, translating, and interpreting corporate communications. It is the knowledge, talent, and ability of our employees that deliver the value from which our customers benefit.

We strongly believe that collaborative partnerships based on mutual respect and appreciation are the best way to ensure the ideal tone of voice and tonality for the copy we produce and the dialogue we pursue.

At Klein Wolf Peters GmbH, it's people who generate content for people.

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C-suite leaders trust us with the communications that can engage their workforce, change people's behaviors, and ultimately, bring the firm's vision to life.

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Every one of our account managers is fully fluent in their linguistic discipline. Their passion for language and dedication to their craft ensure that your message is conveyed as intended.





Great, committed people

We strive to give our customers peace of mind – together with an expert partner LSP that knows what you want because they've been there themselves

The LSP we would love to work with ourselves

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Transcreation & Copywriting · Corporate Language

— **A wide range of languages, verticals, technologies**

— **ISO 17100 compliance**

— **German and Dutch in-house linguist teams**

— **We strongly believe in**

Partnership · Sustainability · Customised service



Kocarek GmbH is an experienced **translation service provider** located in the metropolitan hub that is Essen, **Germany**. **Since 1976** we have been at the heart of the translation industry, actively partaking in the initiation, implementation and integration of **new technology** and solutions that carry our industry into the **future**.



Our team of **project managers, in-house translators** and **computer linguists** provide our clients with the full range of professional language management services – from translations and terminology management to desktop publishing and online proofing.

In 2019, we extended our expertise to the **development, deployment, localisation** and **implementation** of **chatbots** and virtual assistants.

Our strong, resilient and curious **team** is the **backbone of our company**. Guided by our shared values we look out for each other so everyone can do their best work and be their best self, helping to create and sustain an **empowering** and **nourishing work environment**.

Together, we work to **establish, strengthen** and **maintain** networks within the **LSP community**, promoting open communication and **respectful**, professional **relationships**.



FRS | Financial Reporting Service

FRS - your solution to quality financial translation & reporting

Financial Reporting Service (FRS) are experts both in financial text translation and regulatory standard implementation to help you pass your audits, fulfill all reporting requirements and publish your financial statements on time. **Our clients love that we get things done right for them, the first time.**

Our specialties include:

- ✓ **Consulting** for IFRS implementations to fulfill regulatory requirements. We assist CFOs, CFAs and other executives to fulfill all accounting requirements on time.
- ✓ **Translating** financial texts from/into German and English. Our accounting experts have over 10 years of experience providing high-quality financial translations.
- ✓ **Training** your team and organizing financial workshops on specific IFRS topics. We have trained hundreds of financial professionals to streamline workflows, ease software implementation and apply the latest IFRSs.
- ✓ **Implementing** ESEF reporting software. Due to our experience and expertise, we help clients from selecting a suitable IT service provider, to implementing selected tools and labelling data sets to report accurately.

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Ulrich Barnewitz:
“In the next 3-5 years we will see a German superagency”

This is a pivotal year for the biggest market in Europe – Germany. What exactly is the key change we are experiencing?

- The changes that lie ahead of us in the next couple of years will definitely be starker and more profound than the changes we witnessed in the last decade. We currently have a generation of digital natives entering the economy, and they are now empowered to make business decisions. They pick their business partners in a different way from the previous generation, which still tends to focus on a high degree of linguistic quality. As we have seen, Covid-19 also helped to catalyse digitisation, and our customers' technology requirements have therefore changed dramatically over the course of this year.

In this respect, the language service industry certainly needs to pay attention. LSPs are now asked to demonstrate the capacity for systems integration, for teamwork and for technical expertise, because, to be honest, pretty much everyone who is serious about translation in Germany can deliver quality. New buyers are changing somewhat quicker than the former generation, but they are still human, and they still want to have someone they can trust in a world in which everything is in a state of continuous change.

Unlike France and the Nordic countries, Germany – the biggest market in Europe – still hasn't produced a super LSP to rival the global top 30. Do you think this is going to change?

- I'm confident that in the next three to five years, we will see a German-based and German-speaking language services company with a revenue of more than 100 million euros. Despite that, Germany will remain a very fragmented market due to the fact that we are the largest SME economy in Europe – an economy with hundreds of specialised hidden champions, many of them export-oriented.

Apostroph Group/Wieners+Wieners is extremely active in mergers and acquisitions. What should LSP owners know when they consider you as a potential acquirer?

- We have completed a total of eight corporate add-ons to the group since 2016. All of these acquisitions are either completely integrated or in the final process of integration.

As a result, our client portfolio comprises a highly diverse mix of specialty fields, industries and sectors: Wieners+Wieners, for instance, is a premium all-rounder that can handle all kinds of texts and specialty fields but with a clear focus on clients active in marketing, advertising and the creative fields; MedDoc, our acquisition of 2018, specialises in translations for the areas of medicine, medical technology and the life sciences in general; Apostroph Switzerland is essentially the Swiss counterpart to Wieners+Wieners but with a clear focus – particularly in Switzerland – on the technical and technological industries as well as financial and insurance areas. Together, we are Apostroph Group and can benefit from a wide range of strategic synergies, thus allowing us to stay at the cutting edge of technology and serve our many trusted clients.



Wieners+Wieners

As a member of the Apostroph Group, Wieners+Wieners GmbH is an internationally active provider of premium language services in the form of translations and adaptations as well as proofreading and editorial services. Founded in 1990, Wieners+Wieners specialises in advertising and marketing texts and realises a wide variety of projects that are adapted to the target markets with its comprehensive network of hand-picked native-speaker translators. Its customers include most of the leading German advertising agencies and numerous major companies as well as small and medium-sized agencies.

Apostroph Group

With more than 4,400 corporate clients, the Apostroph Group is one of the leading language service providers in Switzerland and Germany. The corporate group maintains locations in Berlin, Berne, Bremen, Frankfurt am Main, Ahrensburg near Hamburg, Lausanne, Lucerne, Munich and Zurich. With over 120 colleagues – including more than 20 in-house proofreaders – Apostroph offers premium language services from a single source. In addition, Apostroph has a comprehensive network of over 2,000 highly qualified translators for various subject areas at its disposal. The Apostroph Group offers technical translations in more than 70 languages – tailored to the local market, on schedule and bespoke to the needs of the client. To this end, Apostroph makes use of state-of-the-art language technology, and customer data is stored locally in the respective country. Apostroph is certified in accordance with ISO 9001 and ISO 17100.



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Translation 2nd generation

Comtext was founded by Rolf Pankrath in 1990. It was the first year private businesses could be established in the New Länder – the states of former East Germany. Historical and cultural incorporation with Central and Eastern European countries was strong. As the demand for Eastern European languages prospered in the 1990s, Comtext soon became a welcomed partner for corporate clients and LSPs in West Germany.

Globalisation and digitalisation are reshaping the world rapidly and technological change is yet speeding up. To make sure Comtext can meet the challenges of the 21st century, management was passed on to the 2nd generation: in 2019, Otto Pankrath took over the management.

Comtext now is a modern language service provider ready for the digitalised future.

If you are seeking a reliable long-term partnership,

Do not hesitate to contact us

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KEVIN LAVOIE

Human Relations Manager,
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