Final report on the SME panel consultation on eTranslation and language technologies

Executive summary

This report briefly presents the implementation and results of the SME panel consultation run between December 2019 and March 2020.

Over 2,800 SMEs replied to the consultation organized in collaboration with DG GROW. The results show that of the SMEs taking part:

- over 95 % expressed interest in using a free, secure, automated translation system provided by the EU;
- over 70 % find automated translation useful for their business;
- 46 % plan to start cross-border business for which translation will be useful;
- 40 % had not previously used machine translation.

As a complement to the consultation, we run a **pilot phase testing eTranslation with 635 SMEs** active in all economic fields and across 25 countries.

92 % of the SMEs who gave feedback find eTranslation usable, 50 % expect to use it every day or every week, with monthly usage expected to be around 5 documents per SME. The capacity of the system has been tested and can meet this expected SME usage.

More importantly, the vast majority of the consulted and pilot tester SMEs greatly appreciated the offer of direct access to a secure EU service, as directly benefiting them, and bringing the EU closer.

As an illustrative example, a representative of Italian SMEs commented:

*[…] in my modest opinion, the tool you are promoting – eTranslation – is a very powerful one. After testing it, I think that **European SMEs will appreciate it as much as we all appreciated the roaming initiative on phone calls** […] sometimes we are even scared to use a google tool, because of sensitive data contained and privacy's statements; a tool provided by the EU would let an SME get a contract translated (at least, indicatively), without worrying about these aspects or paying a fee to a translator to overcome them. I will thus not only promote the consultation, but encourage my clients to test the tool. […]*

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1. CONTEXT

The CEF Telecom WP2019-2020 opens eTranslation, the free-of-charge secure automated translation tool provided by the European Commission, to all European SMEs.

2. OBJECTIVE

Before proceeding to the rollout, CNECT.G.3.002 wanted to better understand **SMEs' interest, needs, usage and use cases for automated translation and language technologies in general**.

As a complement to the SME panel consultation, we run a **pilot testing** with 635 SMEs active in all economic fields and across 25 countries. The general purpose of the pilot testing was for SMEs to **crash-test** eTranslation.

3. IMPLEMENTATION

3.1. Promotion

The consultation was primarily promoted by GROW.H.2 through the Enterprise Europe Network (EEN). Less than 3,5 % of the replies came via other channels (e.g. direct promotion activities with DIHs, ELG, ELRC, Eurochambres etc.).

3.2. Stakeholders

In addition to CNECT.G.3 and GROW.H.2, one colleague from GROW.H.1 was also involved at some occasions. DGT delivered a translation into 22 languages (in common agreement Irish was not requested).

The EEN's activity varied from Member State to Member State. A few of the EEN partners were directly in contact with CNECT.G.3, others corresponded with us through GROW.H.2 via a dedicated feedback tool.

3.3. Duration

The consultation ran from 6 December 2019 to 3 March 2020.

3.4. Questionnaire

Apart from the profile questions, we asked 12 clear and simple questions. The complexity according to the EU Survey tool was 2 out of 4, which was appreciated by several EEN partners.

4. RESULTS

4.1. Number of answers

The consultation received 2868 answers. Some of the EEN partners linked the high number of answers to the low complexity of the questionnaire and the fact that there was eTranslation, a tangible and useful tool supporting our action.
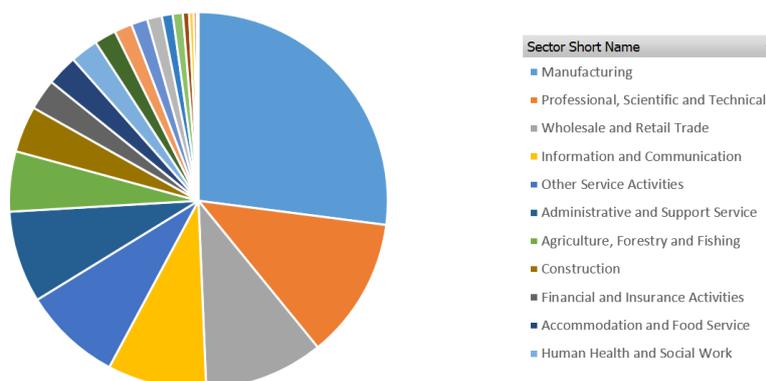
4.2. Country coverage

The table below indicates the number of replies per country. We observed an overrepresentation of some South European Member States (e.g. Italy, Portugal, Greece) and some Central European Member States (e.g. Hungary, Poland). We also perceived an underrepresentation of some Member States (mainly Croatia, Ireland, Netherlands, Slovakia and Sweden). In 8 answers the SME's indicated location was North Macedonia, in 1 answer India and in another 1 Saudi Arabia (adding up to the 10 in the *Other* category). No SME expressed its opinion from Austria, Luxemburg, Malta, nor did it any from Norway in its capacity of CEF AT contributor.

| Country	Count		Country	Count
Belgium	109		Italy	431
Bulgaria	53		Latvia	7
Croatia	1		Lithuania	33
Cyprus	26		Netherlands	2
Czechia	25		Other, please specify	10
Denmark	85		Poland	417
Estonia	4		Portugal	391
Finland	26		Romania	163
France	214		Slovakia	2
Germany	216		Slovenia	10
Greece	135		Spain	189
Hungary	187		Sweden	2
Iceland	5		United Kingdom	106
Ireland	1		Grand Total	2860

4.3. Sector coverage

The chart below indicates the sector coverage. Whilst we thought that SMEs active in wholesale and retail trade, information and communication or other service activities would be interested in our action, we discovered a huge interest from the manufacturing, professional, scientific and technical or the agriculture and food industry.


Sector Short Name
- Manufacturing
- Professional, Scientific and Technical
- Wholesale and Retail Trade
- Information and Communication
- Other Service Activities
- Administrative and Support Service
- Agriculture, Forestry and Fishing
- Construction
- Financial and Insurance Activities
- Accommodation and Food Service
- Human Health and Social Work

4.4. Number of employees of the replying SMEs

Most of the SMEs have 1-9 employees, followed by SMEs having 10-49 employees.
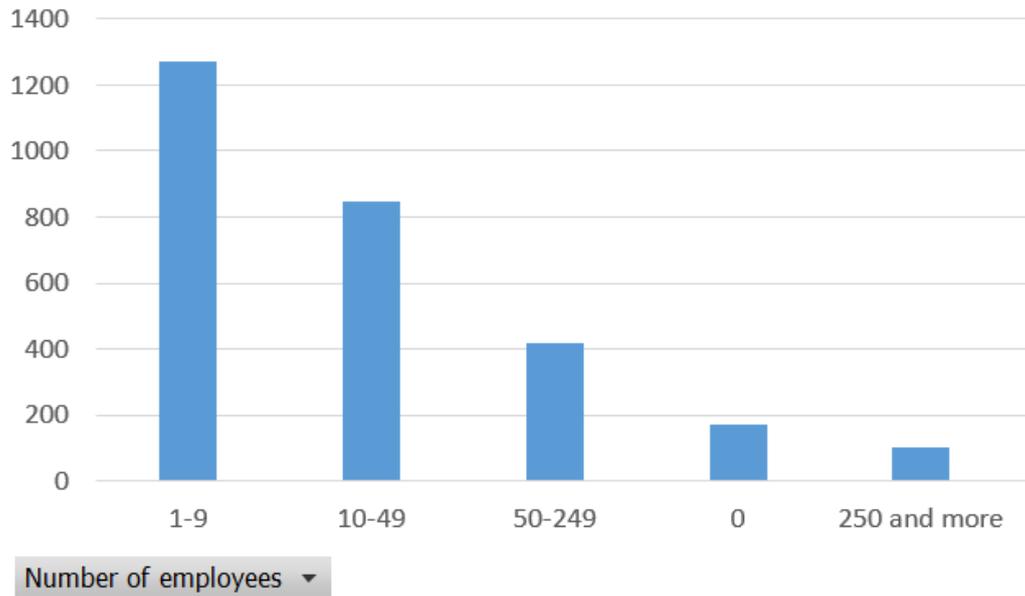
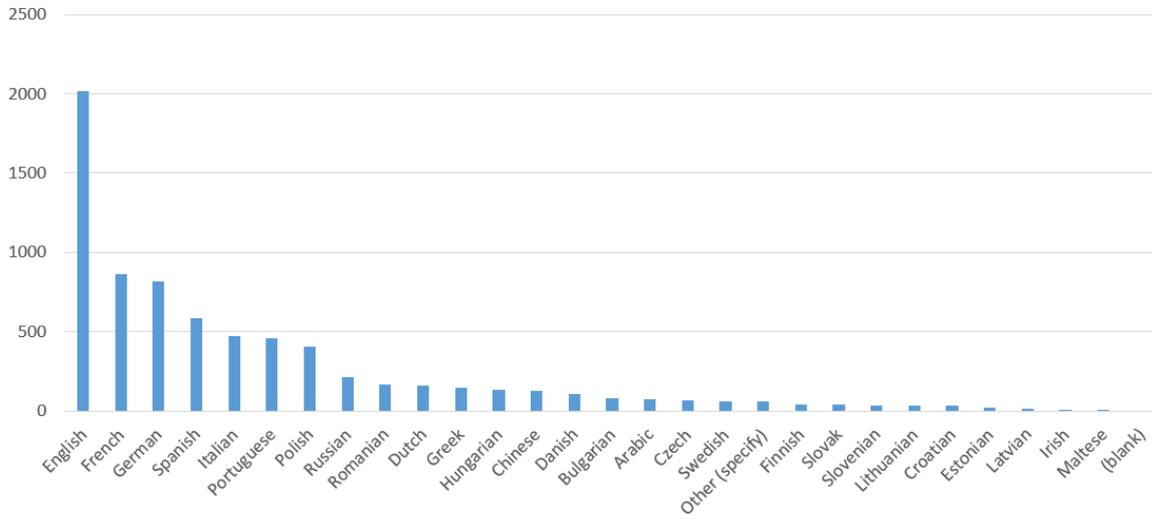
4.5. International profile and prospect of the SMEs

While only 1/3 of the SMEs are located in border regions, 46 % plan to establish abroad and only 1/4 of them have neither business partners nor activities abroad.
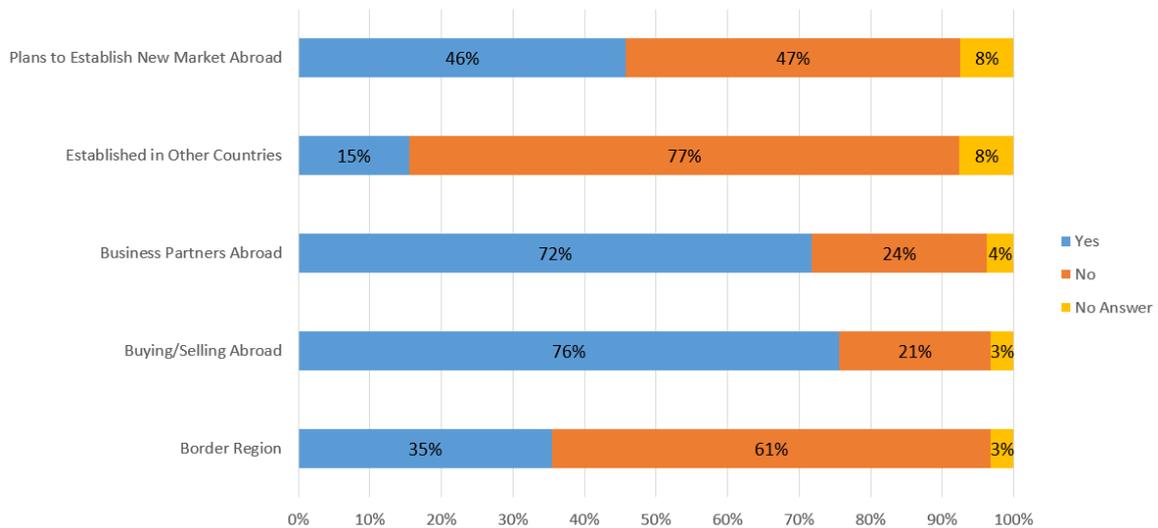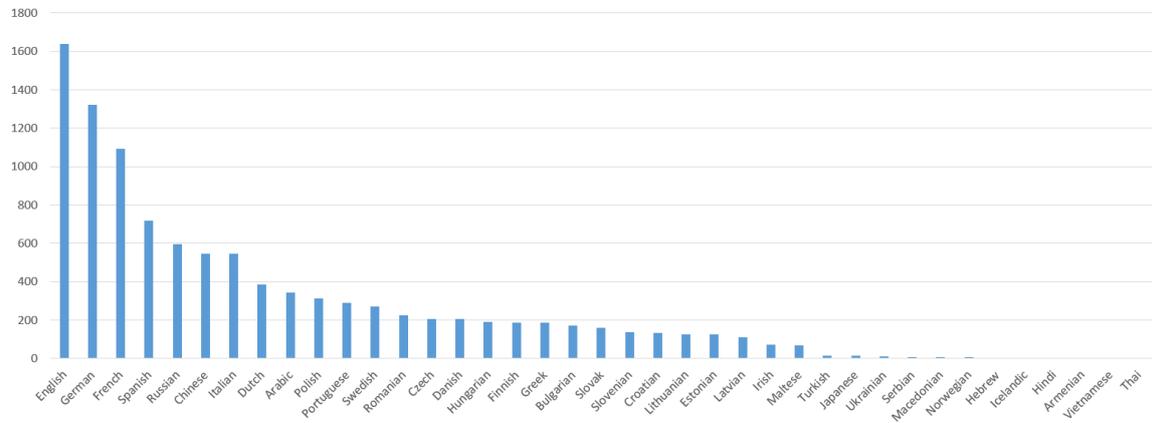
4.6.   Working language(s) of the SMEs

Almost all the SMEs indicated their national language plus English as the company's working language.

4.7.   Translation need(s) of the SMEs by language

English, German and French are clearly in the top three, followed by Spanish, Russian and Chinese.

4.8. Potential use of human vs. automated translation by activities

Automated translation is the right tool for 80 % to understand social media, for over 70 % to gather information and for over 60 % to be deployed on chatbots. Furthermore, automated translation seems to be the preferred tool in seeking business partners abroad and purchasing products or services. Human translation takes the lead when negotiating or signing contracts.
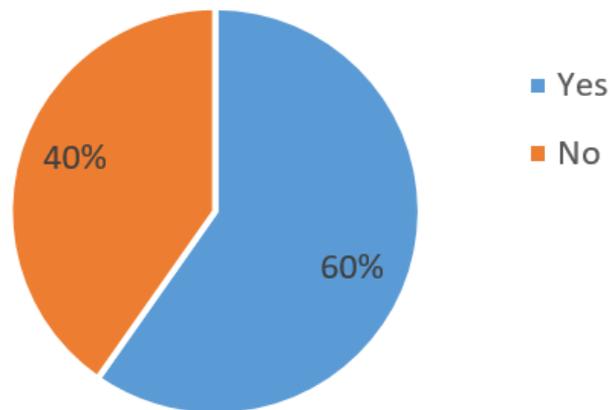

How do you see the main use of translation in:
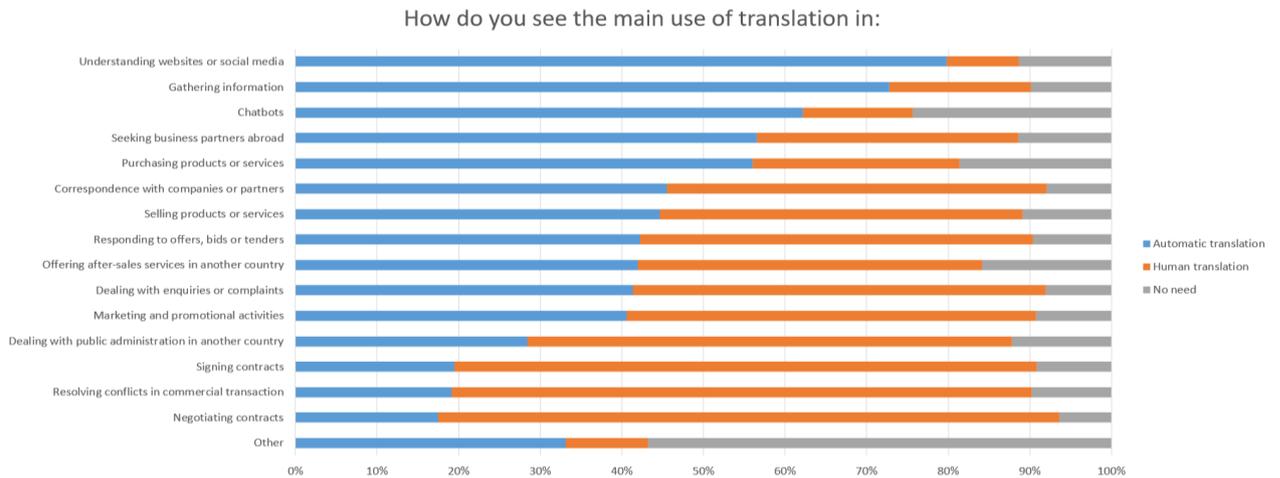
4.9. Importance of specific features of automated translation

Accuracy is the number one feature for SMEs, while support seems to be the less important.
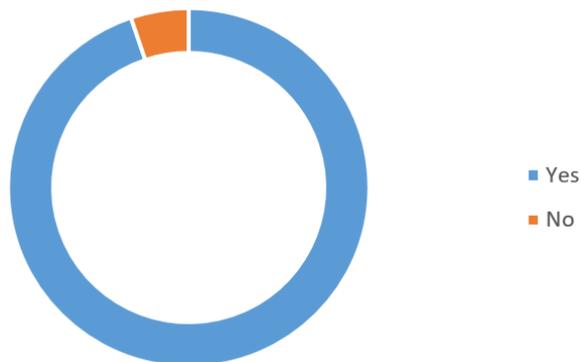

For SMEs, how Important is:
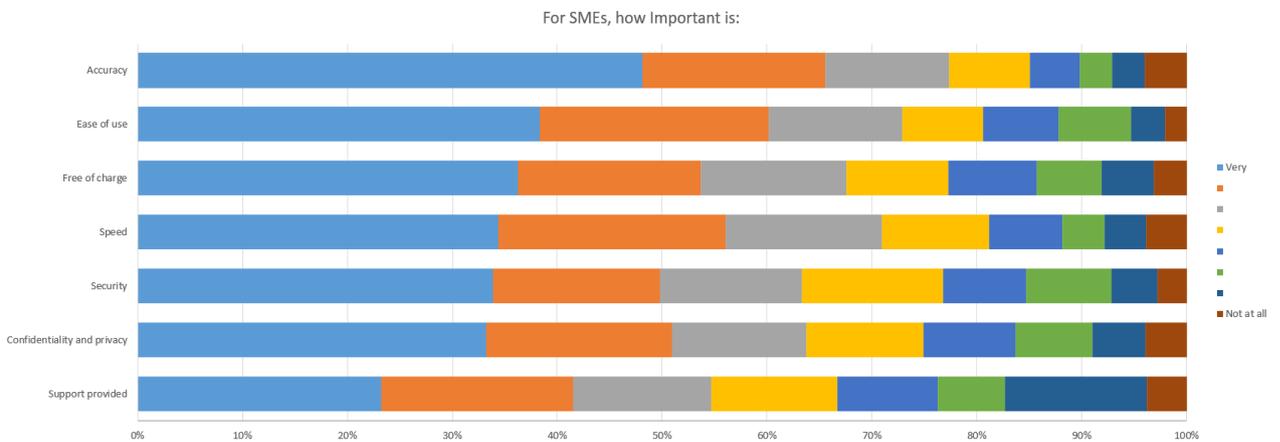
4.10. SMEs' current use of automated translation

40 % of the SMEs discovered automated translation through this action.

4.11. SMEs' interest in a free, secure, automated translation system provided by the EU

Over 95 % expressed interest in using a free, secure, automated translation system provided by the EU.
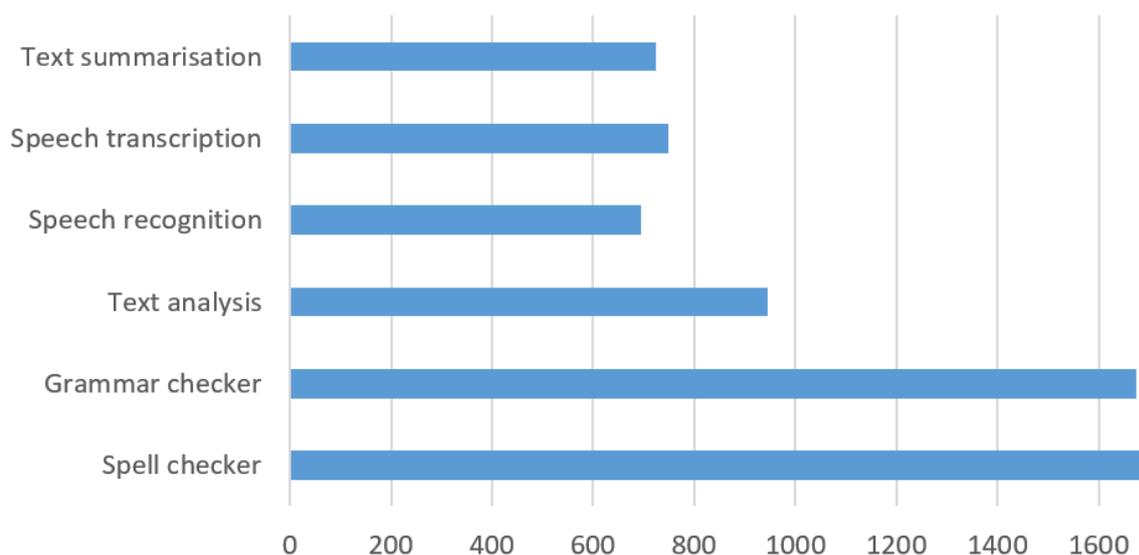
4.12. SMEs' expected eTranslation usage per month

Consultation and testing confirmed that monthly usage is expected to be around 5 documents per SME. The capacity of the system has been tested and can meet this expected SME usage.
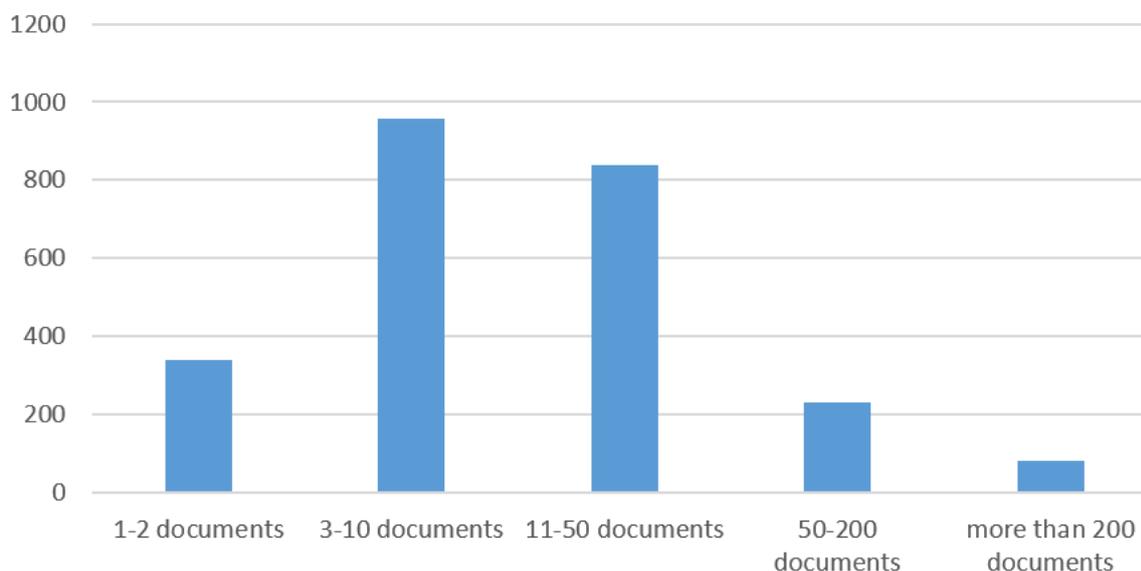
4.13. SMEs' interest in other free language technologies

4.14. Open question on specific needs in language technologies

SMEs expressed their needs the following features or tools:

- **domain adaptation*** along with **thematic dictionaries** for various sectors (e.g.: health, medical, food, maritime, ICT, chemical, legal, geoinformatics, plastic, cinema, advertisement, communication, creative industry)

- **speech recognition tool** (also for languages not currently supported)

- **automated website translation**

- **more languages** for automated translation (e.g. Asian languages or Turkish, see also point 4.7.)*

* Actions foreseen in the MT note (Ares(2019)3249181), with Japanese due to be added in 2020 and work ongoing about scientific texts.

4.15. SMEs' willingness to test eTranslation

Question number 12 of the consultation *Would you be willing to test the secure automated translation tool provided by the European Commission?* helped us to identify SMEs willing to crash-test the system. Due to the huge interest shown, the initial number of 200 testers had to be revised upwards. In total, **635** SMEs participated in the pilot testing covering various sectors and 24 Member States plus Norway. Only the Czech Republic, Estonia, Ireland and the Netherlands (as well as Iceland in their capacity of CEF AT contributor) had no testers. To evaluate the user satisfaction of SMEs participating in the pilot testing of eTranslation, CNECT.G.3 launched on 31 January 2020 a feedback consultation (see also: *Report on the pilot phase analysing the opening of eTranslation to European SMEs*).

5. OUTCOME

The SME panel consultation and the pilot testing confirmed that SMEs in almost all sectors are interested in automated translation and other language technologies. While we had assumed that nearly all respondents would already use an automated translation tool and/or have clear ideas about use cases, in fact 40 % discovered automated translation through this action.

The consultation not only helped us to better understand SMEs' need but also to fine-tune our project. As of 23 March 2020, the **promotional webpage of eTranslation**[1] is open to all European SMEs. This constitutes a huge step towards achieving the Single Market in terms of language technologies.

6. RECOMMENDATIONS

We appreciate the excellent collaboration between DG CNECT and DG GROW and would recommend such an SME consultation to any Commission's service for SME reach-out activities.

Consultations could be further improved by making the **online form available in all languages** not only a *.docx or *.pdf version. In our feedback consultation through the EU Survey tool the online questionnaire was available in all the 22 languages, as we sent

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[1]

https://ec.europa.eu/cefdigital/wiki/display/CEFDIGITAL/eTranslation+for+SMEs#eTranslationforSMEs-first

a translation request to DGT using the *.xml format. This enables the translations to be uploaded efficiently into the EU Survey tool.

We recommend GROW.H.2 to further analyse the **response rate per country** and possibly strengthen the EEN presence in some countries (see chapter 4.2. Country coverage).

7. FOLLOW-UP

We would like GROW.H.2 to inform the EEN partners about the outcome of our actions and would appreciate it if the network could further disseminate the promotional webpage of eTranslation[2], possibly included in future packages and services they provide to SMEs. Furthermore, we intend to conduct a second feedback campaign in early 2021 to assess user satisfaction and further development needs.

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[2]

https://ec.europa.eu/cefdigital/wiki/display/CEFDIGITAL/eTranslation+for+SMEs#eTranslationforSMEs-first