Why Europe needs a

Multilingual Digital Single Market
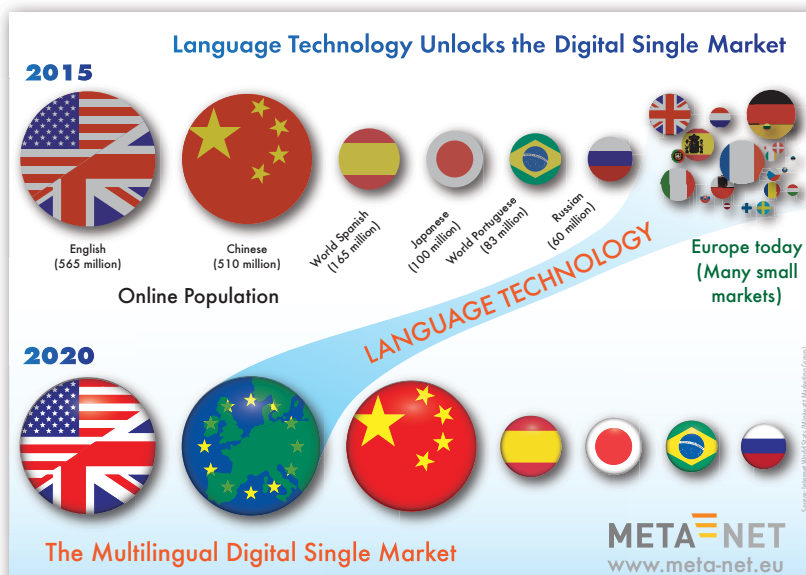
Europe's 24 official languages present a tremendous opportunity for European business

Removing language barriers *within Europe* would **open access to 73% (with >€25 trillion in annual revenue!)** of the world's digitally accessible market to European enterprise.

Europe today is not a single market: it is a separated into 20+ small language markets.

Current eCommerce growth within Europe is about **half that of the US**, due partially to **a lack of language coverage** from European SMEs.

Less than 5% of European SMEs currently sell cross-language.

Language Technology Unlocks the Digital Single Market

2015

English (565 million)
Online Population

Chinese (510 million)

World Spanish (165 million)

Japanese (100 million)

World Portuguese (83 million)

Russian (60 million)

Europe today (Many small markets)

LANGUAGE TECHNOLOGY

2020

The Multilingual Digital Single Market

META-NET
www.meta-net.eu

Source: Internet World Stats (Miniwatts Marketing Group)

No single language accounts for more than 20% of the potential *Multilingual Digital Single Market*.
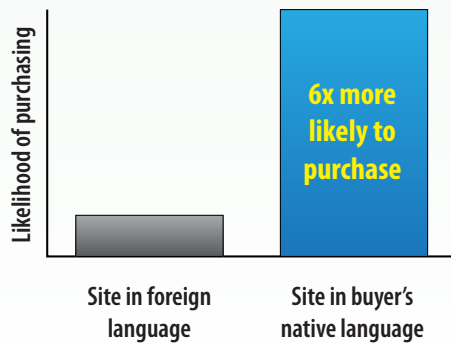
Most account for less than 3% of the DSM.

Without a solution, the European Digital Single Market will remain fragmented.

THREE PRIORITY AREAS FOR ACHIEVING THE MULTILINGUAL DIGITAL SINGLE MARKET

1 *Multilingual* access to all digital goods and services across Europe

Customers are **six times more likely to buy** from sites in their native language.

Likelihood of purchasing

6x more likely to purchase

Site in foreign language

Site in buyer's native language

English is not the answer

52% of EU customers **do not purchase** from English-language sites.

Adding even a few languages to an SME's website beyond English can have a **major impact on revenue**. Large organizations today often localize products and websites into fifty or more languages to increase market share.

Most EU languages address less than 3% of the market, fundamentally **limiting SMEs** operating in countries where those languages are spoken.

Language can be expensive for SMEs

Online businesses face around **€5,000 in up-front costs** for **each new language they translate their websites into**, plus similar ongoing costs for maintenance. These figures do not include support and marketing costs.

Even when sites are translated, the vast majority of SMEs cannot **respond to support requests or customer feedback** in other languages. Such responsiveness is needed to achieve customer satisfaction and build brand loyalty.

Lack of language technology support (automatic translation, tools to assist human translators, and multilingual support in content-creation tools) restricts customer access to content and excludes millions of individuals from the online audience of European businesses.

Geo-blocking and language-blocking are barriers to access

Geo-blocking:
- keeps customers from accessing content due to nationality, location, or residence
- can be worked around by tech-savvy customers
- prevents some cross-border commerce

Both geo-blocking and language-blocking are daily problems for tens of millions of EU citizens.

Language-blocking:
- keeps customers from accessing content in languages they do not speak
- customers never even know what they cannot find
- is unavoidable: no-one speaks all languages; however, current online translation is insufficient
- prevents customers from even *trying* to conduct cross-border commerce
- disproportionately impacts speakers of less common languages

2 Boosting commerce through multilingual technologies

The native languages of approximately **140 million EU citizens are in the Language Technology Danger Zone**, where language technology is inadequate to support the DSM.
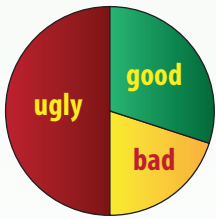

Online Automatic Translation Quality

Current online automatic translation provided by US tech giants does not solve the "language problem": **less than 30% of automatically translated content is truly useful** for online commerce.

Language Technology Danger Zone (≈150 million EU citizens)
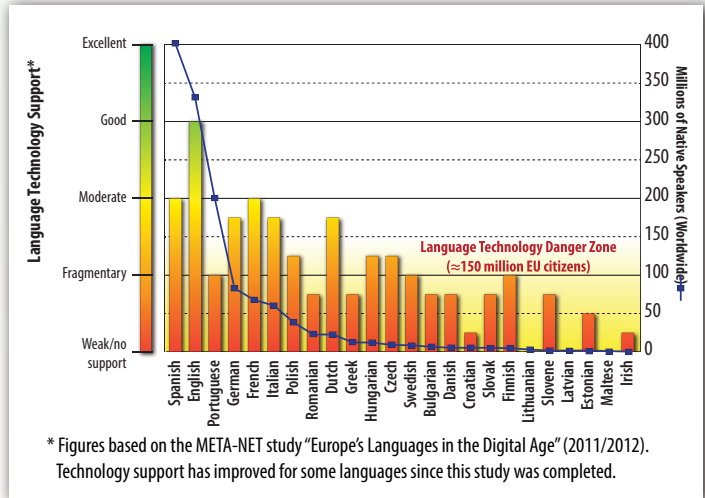
* Figures based on the META-NET study "Europe's Languages in the Digital Age" (2011/2012). Technology support has improved for some languages since this study was completed.

Only three European languages (Spanish, English, and French) meet at least the "moderate" level of language technology support.
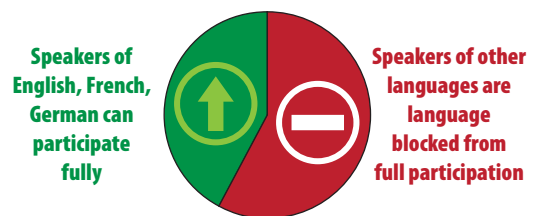

Translation Costs

Increase in Revenue

€
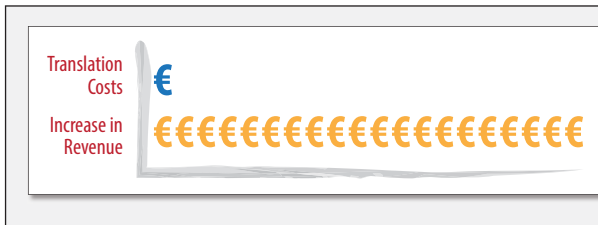
Translation opens **20 times its cost** in revenue opportunity. However, **translation remains too expensive** for many European SMEs, blocking this opportunity and limiting economic growth in Europe. Lowering these costs is a strategic opportunity for high-quality automatic translation.

3 Connecting citizens to European digital public services

290 million EU citizens excluded

Over half of EU citizens are language blocked from interacting with the European Commission's web resources for citizen participation.

Speakers of English, French, German can participate fully

Speakers of other languages are language blocked from full participation

Without Language Technology, the European Commission has **no way to respond effectively to citizen participation**.

Current language technology is **inadequate for over half of the EU official languages** to help the European Commission solve its citizen engagement problem.

Most local governmental services are **monolingual only**. This poses a problem for **tourists, expatriates, and linguistic minorities**. Language technology can provide the next generation of technology solutions for public services.

Multilingual eParticipation can help build the European Identity
In the medium-to-long term, multilingual language technologies are needed to enable all European citizens to communicate with one another in their respective native languages with sophisticated machine translation working behind the scenes. Only when EU citizens can interact in their own languages will they truly develop a sense of *European* identity and community.

Technology Solutions

Investment in the following solutions will help achieve the Multilingual Digital Single Market

Unified Customer Experience
- Provides a contextualised experience to users (for eCommerce)
- Brings together content, product, customer care, customer relationship, discussion fora, help-desks, etc.
- Unified digital (eco)system across languages

Multimodal User Experience for Connected Devices
- Multilingual speech, text, and gesture interfaces
- For connected devices such as robots, cars, household appliances, and consumer products (Internet of Things)

Voice of the Customer
- Comprehensive methods for multilingual market research
- Connects business to customer opinion and experience across borders and languages

Content Curation and Production
- Smart multilingual authoring support
- Multilingual and multimodal report generation, cross-lingual linking, enrichment, and semantification

Digital Translation Centre
- Automatic translation services
- Free (for the citizen) or for a fee (specialised HQ services)
- To and from businesses, governments, customers, citizens

*The forthcoming **Strategic Agenda for the Multilingual Digital Single Market** will provide additional details on these and other solutions for the needs of the Multilingual Digital Single Market.*

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