SEEKING A CO-PILOT

A Snapshot of
Language Services
Buyer Sentiment in 2025

In the first quarter of 2025, the ATC reported on the evolving realities of UK LSCs, sketching a picture of an industry flying without instruments, navigating mostly by sight, striving to adapt to the AI-first imperative imposed by the business world, and recognising that this adaptation comes at a cost: both human and financial.

We are feeling the pinch. It's not easy being human these days (somehow both a cliché and a massive understatement). I'm using "we" deliberately here, including the *buyers* of language services, too. Over the years working with buyers on research and consulting projects, I've come to see that the two crowds (the LSCs and those who buy from them) share a bond often left unspoken — a fundamental gap in understanding. You might think we've bridged it by now, that we've reached perfect alignment.

Not quite. And it's not because we lack incentive. Previously, we reported on how AI is shifting the ground beneath LSCs' feet. But let's not forget: the clients came first. They were the ones tasked with the impossible ("Implement AI yesterday!"). Only now are they finding the courage to talk about their experiences at conferences or during more private, one-on-one interviews. Their perspective needs to be told,

precisely because without it, LSCs will remain stuck in their own echo chambers, unable to find true north or support their clients more meaningfully. Here's the thing: both sides need each other. But you knew that already. This is merely the summer 2025 reminder.

At its core, it doesn't matter whether your client is a global corporation with a dedicated localisation team or a family-run business in the UK. The challenges *we* face transcend sectors and borders. They're universal. And the way forward is together, through mutual understanding, joint exploration, and co-creation of solutions. Buyers need co-pilots. Show of hands — who's on board?

Gabriel Karandysovsky
Industry Researcher,
Analyst and Writer

Buyer, buyer, what's on your mind today?

Let's start with some evidence that bears repeating, especially in today's context, and from which much of the client-LSC relationship unfolds:

Buyers, not unlike LSCs or linguists, are feeling the pressure of the moment. They, too, want to keep their jobs — and do well in them.
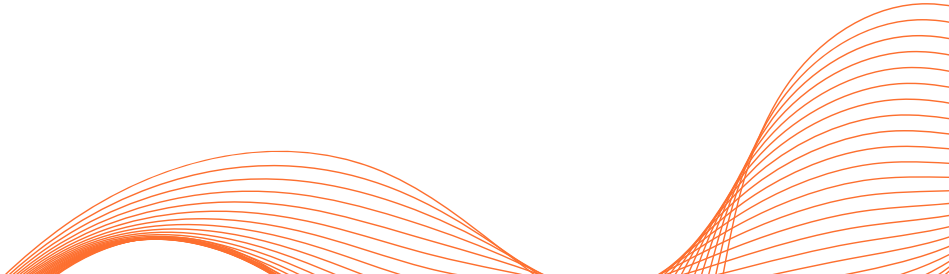
So, what's keeping buyers up at night, with knock-on effects on LSCs?

- AI has become the great equaliser, dialling up the pressure. The main difference? **Buyers are *embracing* it.**

- This isn't just a case of orders being handed down from above — localisation teams are seizing the opportunity to reassess how things have been done. Faced with an existential challenge, **buyers are rediscovering their agency**.

- Like any professionals, buyers seek progression and advancement, and their **opportunities often arise *internally* first**. This may not be very much fun for the LSC...

- ... Indeed, buyers tend to be inward-focused. Their LSCs and the wider supply chain often come second. This means that if LSCs don't step up or remain visible, they risk falling behind.

- The sentiment is echoed on both sides — a sense of not fully understanding each other's priorities or pressures. True, the balance of power typically tilts in the client's favour, but **clients still crave human connection. They don't want to be known as the department of "We'll get this translation back to you in two weeks." Nor do they want to be just another number on an LSC's portfolio.**

The (wide) spectrum of buyers

Any analysis of language services buyer sentiment must begin with the acknowledgement that not every company or situation is the same. There is a broad spectrum of contexts, needs, and requirements to consider when proposing solutions to unique problems.

Let's take a look at the key characteristics that map the diversity of buyers:

- **Nature of the activity:** A company operating in an export-oriented industry will have significantly different language needs than a local, family-run business.

- **Micro-trends affecting each industry:** AI and geopolitics impact everyone (albeit to varying degrees), but trends such as trade tariffs imposed by the US or smaller-scale movements, like layoffs in IT and tech, tend to have a more localised impact. LSCs should make it a habit to track and assess how these trends affect their clients' realities — for buyer-side teams, they are a source of anxiety and can trigger reactive, sweeping changes.

- **Differing levels of localisation maturity**: Every company is *somewhere* along a journey from local to global (unless they've decided that local is perfectly fine for them). This means awareness, needs, and requirements are in constant flux and will likely change between today and a year or two from now (or faster).

- **People**: Every company has a unique mix of talent. Some have dedicated localisation departments, while in others, it's the in-country salesperson doing the translation because no one else thought of it, and they need that sales pitch translated yesterday. Some have hired a data scientist to work with ML or NMT, others translate using spreadsheets. Processes are only as sophisticated — or imaginative — as the people who run them.

# The (wide) spectrum of buyers: new reflex to acquire

Faced with the seemingly endless permutations of client contexts, needs, and requirements, what is an LSC to do?

Earlier in the year, we spoke about LSCs facing do-or-die decisions: diversify or double down on their niche, human-only or AI-augmented, proactive vs. reactive. One can argue these are decisions LSCs must make about *themselves*.

What emerges as the starting point in their relationship is the LSC's curiosity *toward the buyer*. It doesn't matter that an LSC has AI all figured out or the best sales team in the industry *if they are not there*.

An LSC must continuously qualify and periodically reassess the context of their client counterparts. Circumstances change. New C-level stakeholders come on board. Suddenly, everything must be dropped in favour of the AI implementation project. People get better at their jobs or move on (often taking their preferred LSC with them). **An LSC should remain present at all times, accompanying the client and anticipating change at every step.**
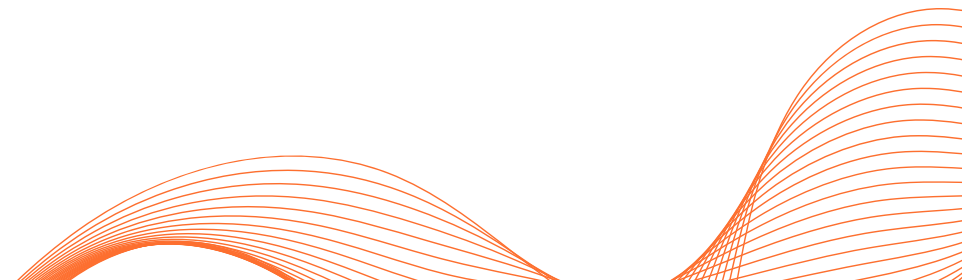
The (wide) spectrum of clients: a (winding) journey
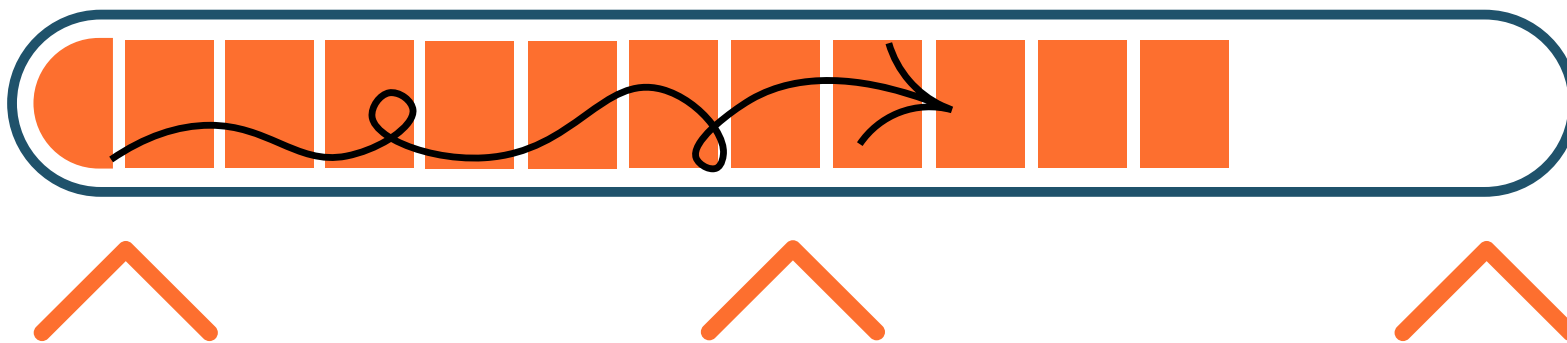
Low translation/localisation maturity, local/regional clients, often smaller scale, only now discovering a *need* to translate, this is the unseen iceberg of unexpressed and unqualified demand.

Key characteristics:
- little to no pre-existing language process, spreadsheet-based (at best)
- translation/l10n is a niche concern, predominantly single-service needs

Translation/localisation aware clients, articulating demand and language-related processes to support global expansion or meet compliance/language access needs.

Key characteristics:
- language activity starting to become organised, with dedicated personnel
- starting to investigate language technology (e.g., TMS) in efforts to streamline or automate
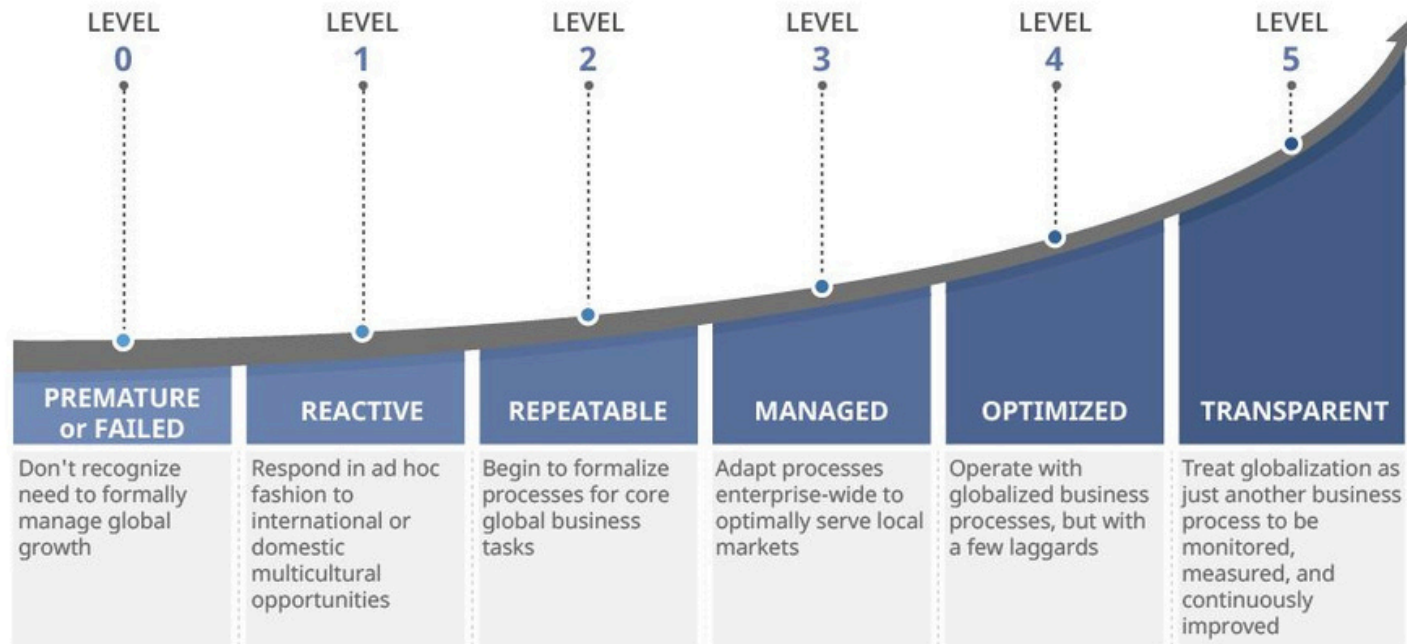- resource constraints

High translation/localisation maturity, brands with a global footprint or those expanding globally, or brands optimising their global presence, focusing on user experiences and market impact.

Key characteristics:
- dedicated teams, dedicated budgets; multi-service, multi-modal needs
- transitioning from human to tech-enabled language workflows
- challenges of scale, internal alignment, AI implementation

Frameworks that help assess readiness and progress

Overview of Six Levels of the Globalization Maturity Model

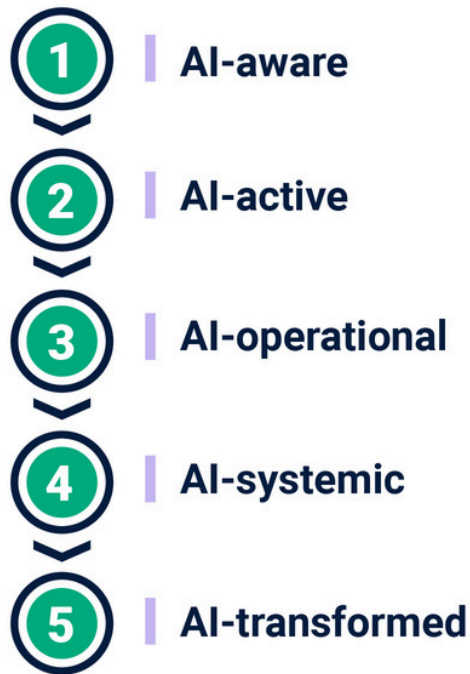| LEVEL 0	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5
PREMATURE or FAILED	**REACTIVE**	**REPEATABLE**	**MANAGED**	**OPTIMIZED**	**TRANSPARENT**
Don't recognize need to formally manage global growth	Respond in ad hoc fashion to international or domestic multicultural opportunities	Begin to formalize processes for core global business tasks	Adapt processes enterprise-wide to optimally serve local markets	Operate with globalized business processes, but with a few laggards	Treat globalization as just another business process to be monitored, measured, and continuously improved

The most well-known industry framework for assessing a company's journey with localisation and globalisation is the Globalization Maturity Model by CSA Research, which covers a company's progression across six levels. Copyright CSA Research.

We signalled the need for LSCs to become strategic advisors to their clients' language needs and global growth. Being able to map the client's journey using existing third-party frameworks is a valuable tool LSCs can leverage. This is as much about **auditing where clients are on their journey and what they need (and what the LSC can sell) as it is about storytelling: clients require both data and a compelling narrative to help sell initiatives internally.**

Frameworks that help assess readiness and progress (continued)

THE AI MATURITY MODEL

1. AI-aware
2. AI-active
3. AI-operational
4. AI-systemic
5. AI-transformed

argos multilingual

LSCs are increasingly using or creating frameworks in their consultative approach toward clients. For example, in 2024, Argos Multilingual developed the AI Maturity Model, a framework that allows clients to measure their progression with AI for localisation.

Clients are continually seeking the right arguments that will help them convert stakeholders and achieve internal alignment — that's what helps them keep their roles and ensures the work continues to flow... eventually landing with the LSC. Hence, the ability to assess (and reassess) their modus operandi is highly valuable, provided they can carve out the time for it.

There are two ways this typically plays out (and one is inherently more valuable to the LSC-client relationship):

1. The client develops a habit of self-assessing (which may leave the LSC out of the loop).
2. Or the LSC, equipped with knowledge about the varied frameworks, **proactively proposes client-adapted solutions, co-charting a path forward.**

"Talk to me straight, LSC," says the buyer.

Establishing a relationship built on mutual understanding and curiosity should be a no-brainer. Of course, this won't happen overnight. With that in mind, let's add some additional colour to how translation and localisation buyers perceive their interactions with LSCs.

- Some of the frequently mentioned keywords by buyers include **pressure, urgency, uncertainty,** and **volatility.** None of these will be lost on LSCs (indeed, this era is characterised by all of these, all at once, and all the time). But LSCs need to step out of the loop of transactional, day-to-day *doing* and shift to *empathising*. Several buyers we interviewed expressed frustration at a **lack of understanding** from LSCs about their daily realities.

- Following on from this, empathy and solution-building shouldn't only happen when the LSC's sales team is wooing the client. Especially, **the project teams should adopt an attitude of curiosity and develop the soft skills that foster a deeper sense of human connection.**

- As mentioned earlier, **for clients with lower localisation maturity, the relationship will inevitably be more transactional. However, the approach should be checked and adjusted when working with localisation-savvy counterparts.** These professionals are often just as passionate and detail-oriented as the LSC's team (or the linguists) and want more than to feel like a number in a spreadsheet. This sense of disconnect is a recurring complaint from buyers working with some of the industry's largest LSCs. And make no mistake — they will see through an LSC's PMs if they're not bringing their A-game.

- There is a perceived gap between what buyers want and what LSCs are offering. Sometimes, the buyer doesn't know what they need until the LSC shows them. **Anticipating clients' needs is of capital importance to the LSC, and it cannot happen if the LSC isn't present.**
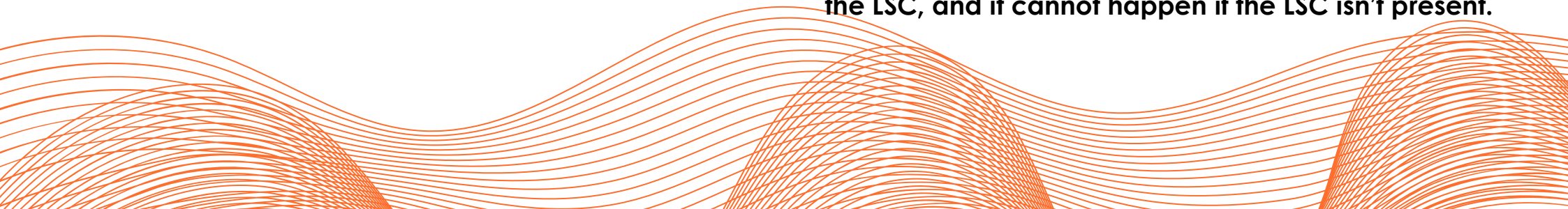
"I'll do it myself," says the buyer, tired of waiting for the LSC.

Part of the perceived gap between buyer and LSC also stems from neither side spending enough time identifying why it exists — nor taking steps to address it. In this absence of movement, here's what buyers are doing:

- Over the past nearly two years with GenAI, a recurring motif across the industry is one of proactivity. On the buyer side, **proactivity is *embraced*** (often because not doing so doesn't help job prospects). For LSCs, this means the pace needs to match. Buyers are not standing still.

- Buyers see **AI as an opportunity multiplier**. Constraints remain (knowledge, budgets, bandwidth), but especially for **higher-maturity buyers, AI is a chance to do more with less, revive long-dormant or previously unfeasible initiatives, or reevaluate parts of the process.** This doesn't mean that all AI experiments will provide a return on investment, as research is showing. But the **buyers are moving**.

- **AI is becoming a feature** of the mature localisation programme, not just a shiny button pressed occasionally. For the less mature programmes, it's a stated destination. The more advanced the buyer, the deeper they are in the *uber-optimisation zone*. For newcomers to language operations, they expect out-of-the-box AI-powered solutions.

- That said, **imagination has its limits**. Many buyers report that now, more than ever, is the time when they rely on their partner LSCs to help drive innovation, particularly when faced with constraints like budget cuts or shrinking teams. We've heard both quiet pleas for help and the proverbial gauntlet being thrown down: **now is the time to step up, LSCs.**
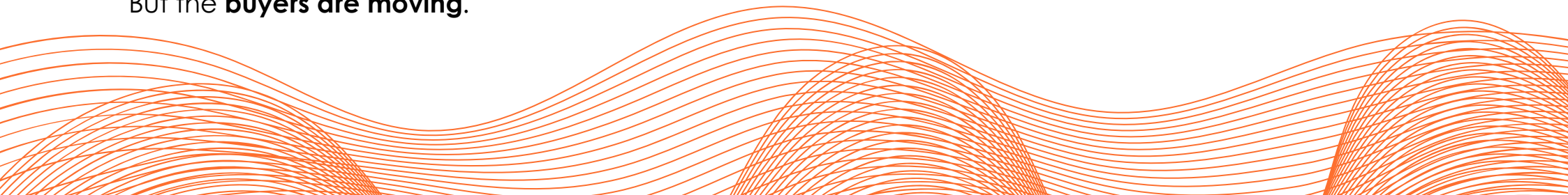
"I won't lie to you, LSC," *thinks* the buyer, "I may not need you any longer."

There is a whole spectrum of buyers, each with their unique quirks and outlook. Many see LSCs as part of the solution. Not everyone is positive, however, and *some* are starting to ask the toughest question of all... And LSCs need to know when this happens.

- We've heard this sentiment echoed multiple times during our qualitative research for us to pause and take note: **Some buyers are privately wondering** (perhaps only a few ready to say it out loud) **whether the LSC model might not have lived its course.**

- This isn't just because of AI being the silver bullet (savvy buyers know it isn't). It's because buyer patience with less-than-great service is limited, and an inflexible, slow-to-move, transactional, translation-only LSC is not helping its own cause.

However sobering the thought may be, the buyers wondering whether they're not simply better off without an LSC is a reflection of an industry whose service and pricing models no longer meet the demands of organisations that need more than just *language*, and a whole host of non-standard (for a traditional LSC) competencies: UX, content design, research, media production, etc.
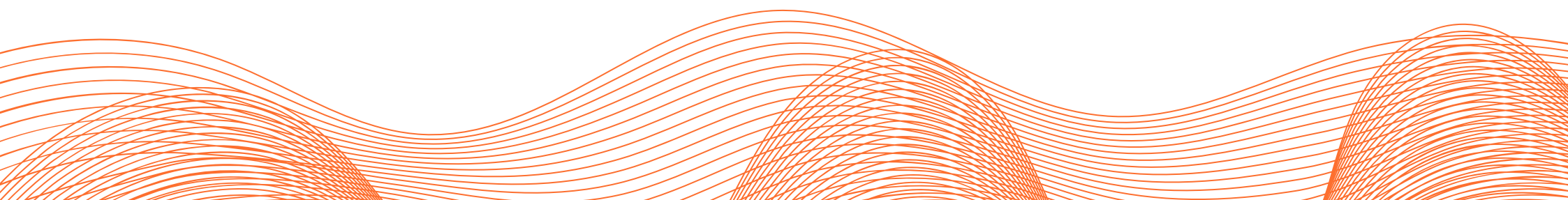
Co-pilots needed

LSCs have a distinct opportunity to step up. This was already true in the pre-GenAI days, but it has become a pressing issue today: **buyers are**, by and large, **seeking co-pilots**. Partners who can help steer the direction of the company's global growth, press the right buttons, have the right data and arguments at the ready, or simply be there, thinking three steps ahead.

AI and the other trends shaping the global business landscape are, beneath the surface, placing a strain on resources: costs are being optimised, people feel an urgency to adapt and expand their skills because their livelihoods are increasingly at stake, and business relationships are being tested and redefined.

Behind the stories shared by buyers at industry conferences or during our interviews, there is movement. Buyers are at the forefront of shaping language demand, and they are not idle. **They are not going at it alone either (they push forward alone only when they have no choice and no one to rely on)**. For every case study in implementing AI, there is a collaboration between multiple parties, with LSCs playing a crucial role as the world continues its march deeper into the AI era.

As a way to bridge the gap in understanding between buyers and LSCs, and to address some of the persistent frustrations, more curiosity and empathy are required. The kind of stuff that gets both sides wanting to sit side by side — co-piloting.