

The future of the legal profession survey

*conducted by AIJA in collaboration with the Council of Bars
and Law Societies in Europe, September – October 2018*



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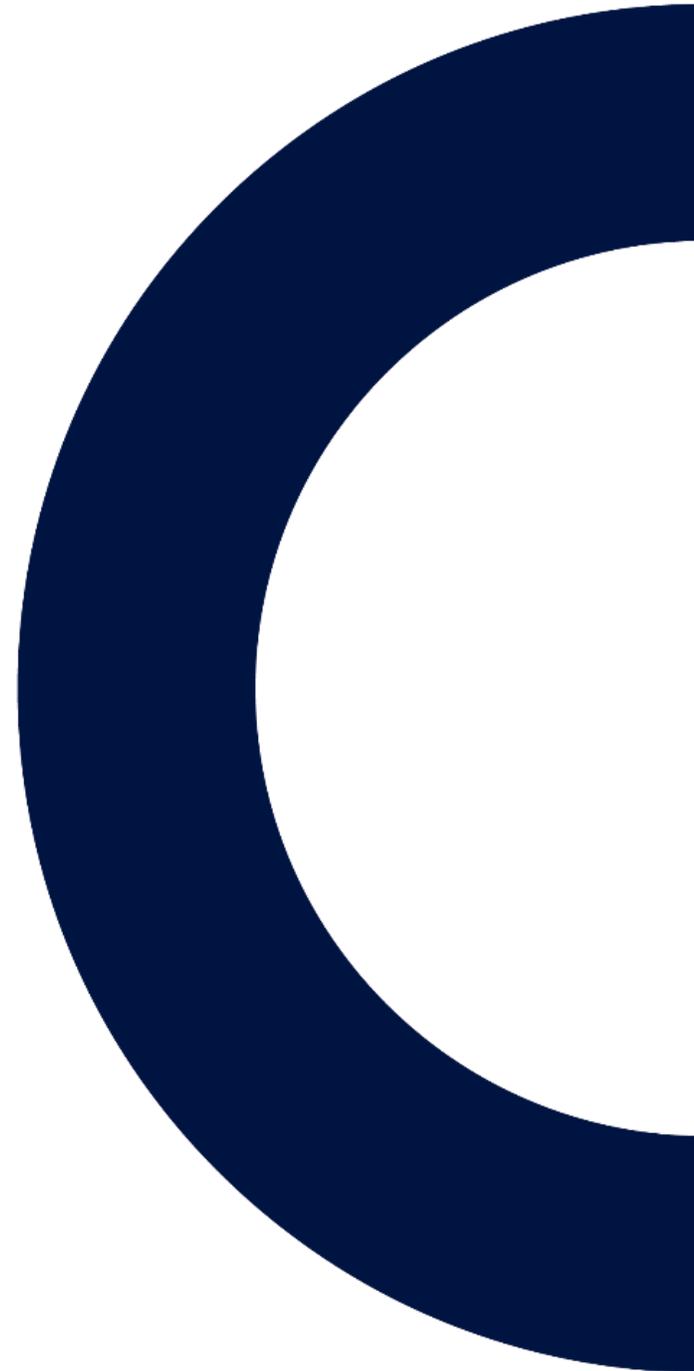




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Contents

- + Methodology
- + Executive summary
- + Top findings
- + Appendix





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Methodology

- Survey conducted in cooperation with the Council of Bars and Law Societies in Europe (CCBE) in September-October 2018 to better understand the issues that impact the future of the legal profession.
- This follows our 2016 survey (July-August 2016)

2016 vs 2018



33 countries represented



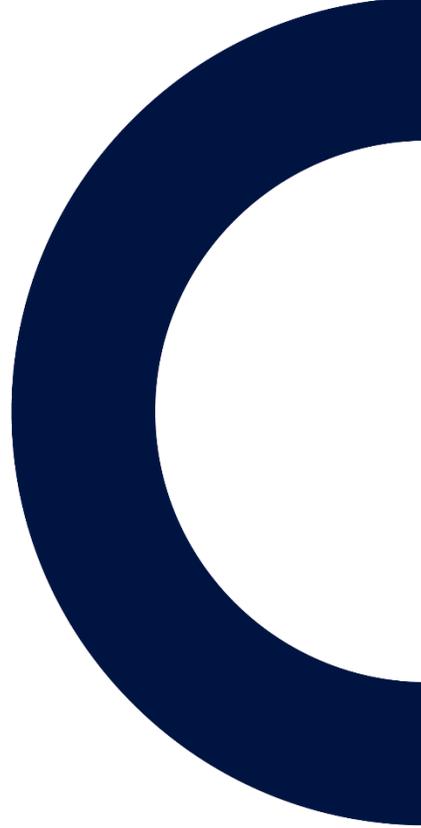
96 responses were collected



48 countries represented



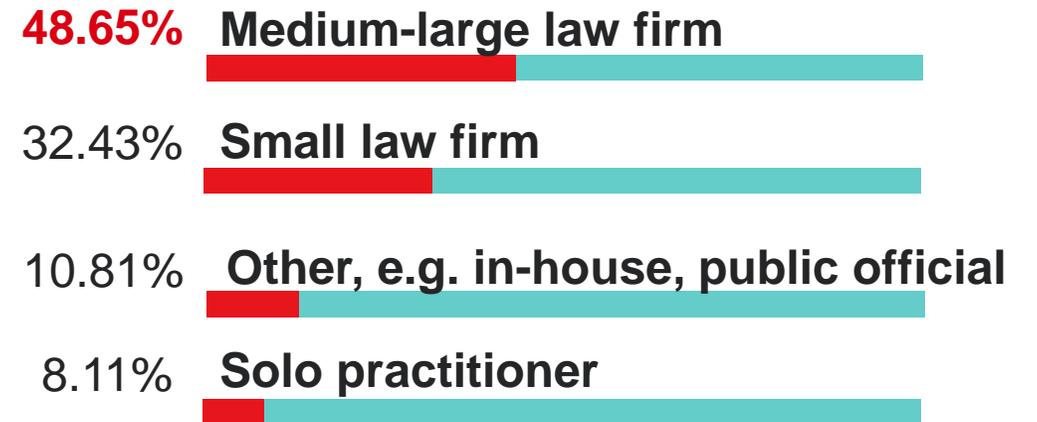
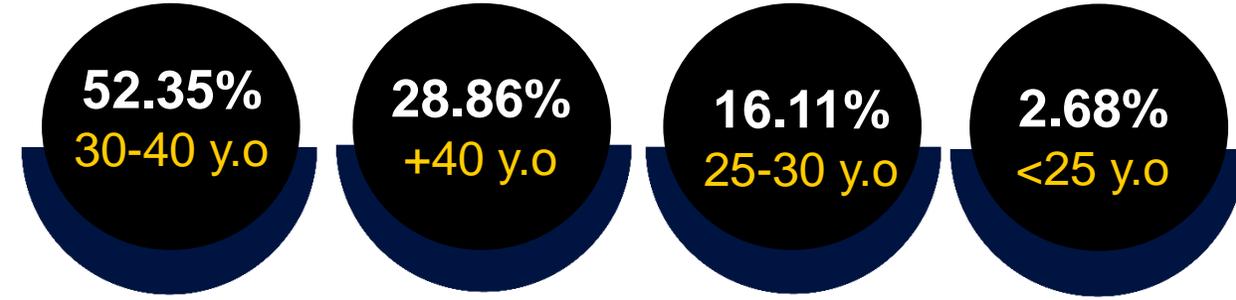
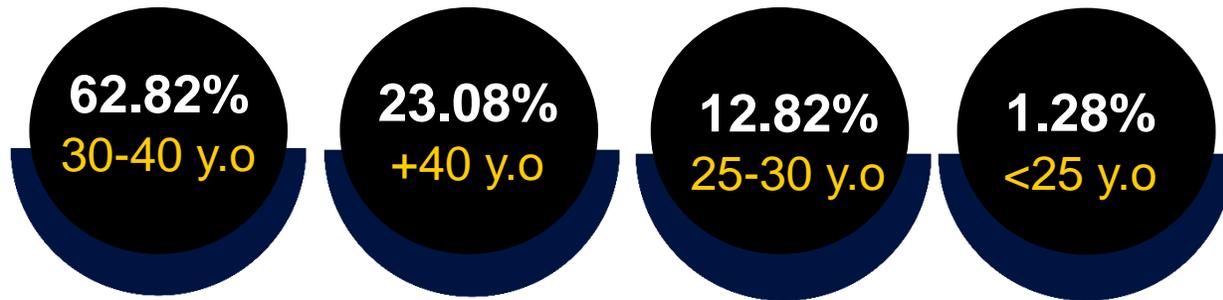
180 responses were collected





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2016 vs 2018



A row of sharpened pencils is shown in a perspective view, receding into the distance. The pencils are arranged in a line, with the closest one in sharp focus and the others becoming increasingly blurred. The entire image is overlaid with a semi-transparent red color, creating a monochromatic aesthetic. The text 'Executive summary' is positioned in the lower-left corner of the image.

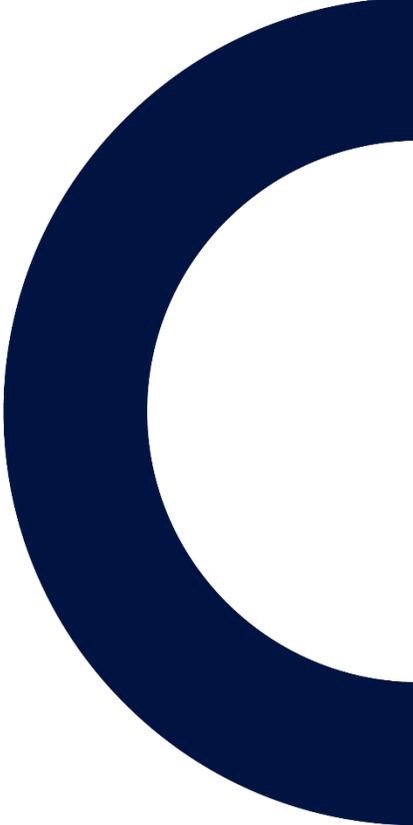
Executive summary



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The future of the legal profession

Biggest threats to the legal profession



Resistance by lawyers to innovate



Alternative providers of legal services



Commoditisation of legal services



Privatisation of justice



Unaffordable fees



Technology replacing human resources



Economic factors





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The future of the legal profession

Current views and outlook for the future

Resistance to innovation

Close to 47% of European lawyers have rated resistance to innovation the first biggest threat to the profession.

The outlook for the future is nevertheless positive, as this marks a decrease of nearly 24% from two years ago (2016).

Rise of alternative legal service providers

86% of lawyers believe that law firms are likely to employ non-lawyers (e.g. project managers, legal technicians) to provide services to their clients in the future. This marks an increase of 10% since 2016.

Pressure to increase cost-effective competency and processes as well as leverage new technologies could be some of the drivers towards outsourcing many legal services to alternative providers. The complexity of services and tasks performed by lawyers will only continue to rise. Consequently, alternative providers of legal services will continue to rise as well, as more areas of specialisation may come forth.

Commoditisation of legal services

The commoditisation of legal services is rated the third biggest threat (30%). Not surprisingly, this is already challenging the law firms' traditional business models. Law firms will need to keep on adapting their business to the commoditisation.

The latest survey findings also reveal that compared to 2016, lawyers seem to be doing more bespoke work (increase of 8%) and less routine tasks (decrease of 18.54%).



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The future of the legal profession

Current views and outlook for the future

Privatisation of justice

The privatisation of justice is rated the fourth biggest challenge (23%). Lawyers foresee a growing trend on the “privatisation” of justice through alternative dispute resolution mechanisms (“ADR”) like conciliation, mediation, and counselling. While ADR in some cases may help to provide a quicker access to justice to parties who otherwise may face overworked traditional courts, lawyers seem concerned about the guarantees, lack of transparency and overall quality provided by ADR.

Use of new technologies

Compared to 2016 (28% vs 16% in 2018), lawyers seem to be less fearful of technology replacing them in the future (*decrease of 43%*). While this marks a more positive attitude towards technology, lawyers are yet lagging in the adoption of new technologies in their law firms.

To overcome the challenges to the future of the legal profession, law firms are taking some measures. 42% of respondents are confident that their law firms are taking the necessary steps to introduce new tools or ways of working: from developing marketing or AI tools, using cloud and online databases, automatisations, to legal project management, developing internal knowledge and establishing multi-disciplinary partnerships.

Business acumen (customer-centric approach), solid digital proficiency, good management skills and openness towards innovation are mentioned as essential skills for the legal profession. With the rise of new technologies, being simply a knowledgeable lawyer is no longer enough. However, only 3% agree that the training of lawyers is sufficiently adapting to the changing landscape of the legal market. More legal training seems required to adapt accordingly and ensure that lawyers remain indispensable in the era of AI technology.



Top findings

A perspective from the young legal profession

2016 vs 2018



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1.

resistance to
innovation

Compared to 2016, European lawyers seem less resistant to innovation.





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2.

rise of
alternative legal
service
providers

Legal services run by providers other than registered lawyers will play a greater role in the legal market in the future.



Due to the rise of alternative legal services, I/my firm have experienced pressure on the level of prices of my/our services.

42.86%
2016

45.08%
2018



Q: Based on the statement above, should there be legal services run by providers other than registered lawyers?



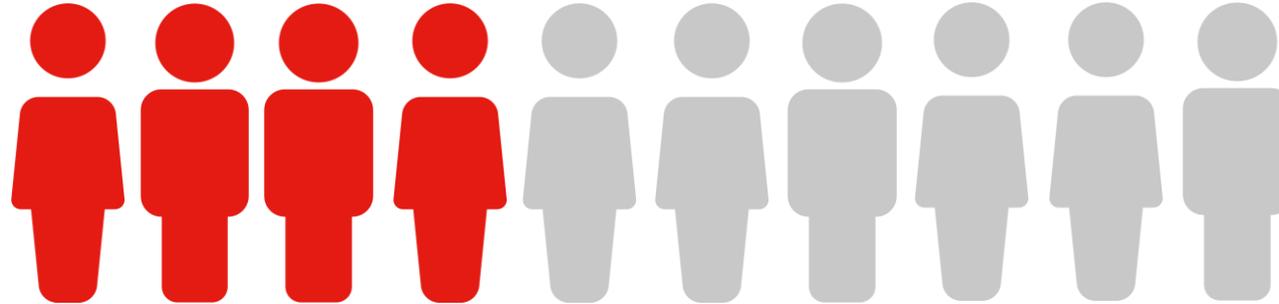
Legal services should be run by registered lawyers only.

7 out of 10 respondents say that legal services should not be run by providers other than registered lawyers.
(same as in 2016)

Q: Does your law firm outsource legal services to external providers? (including other law firms)



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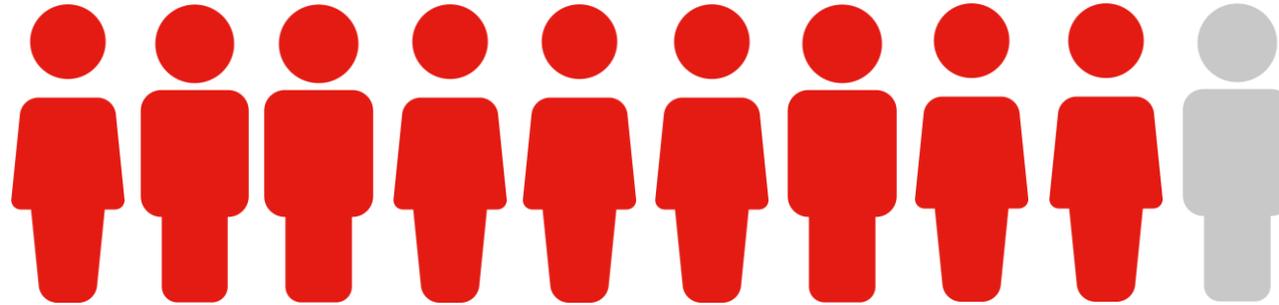


4 out of 10 respondents say their law firms outsource legal services to external service providers (lawyers and non-lawyers).

(same as in 2016)

In the future, law firms will engage in multi-disciplinary partnerships (allowing non-lawyers to become partners).





9 out of 10 respondents say their law firms are likely to employ non-lawyers to be part of multi-disciplinary teams providing services to clients (project managers, legal technicians, etc.).

This marks an increase of 10% from 2016.

My law firm is sufficiently prepared to meet the future challenges to the legal profession mentioned in this questionnaire.

42.85%

2016

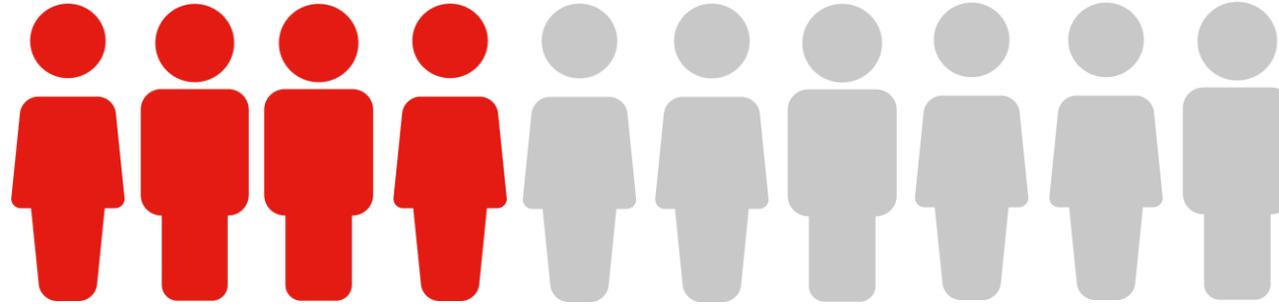
41.03%

2018

4%



Q: Has your law firm taken measures to meet the future challenges to the legal profession mentioned in this questionnaire?



***4 out of 10 lawyers feel confident that their law firms are taking the necessary measures.**

(same as in 2016)

****Examples of measures given by respondents***

- AI, document automatisaion, help from UX/design experts
- Acquiring apps and software to do work in a more efficient manner
- Internal trainings, developing internal knowledge and experience in project management and auditing
- Partnerships with other professionals
- Subscription to online research platforms
- Developing marketing tools
- Hiring project managers, business-oriented professionals, non-lawyer experts
- Using CRM systems, online databases, cloud
- Providing alternative services



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3.

commoditisation
of legal services



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Necessary skills for lawyers (2018)

Business minded

33.12%

General digital competence

17.20%

Management skills

15.29%

Innovative skills

10.83%

Psychological skills

7.01%

Financial and accountability skills

4.46%

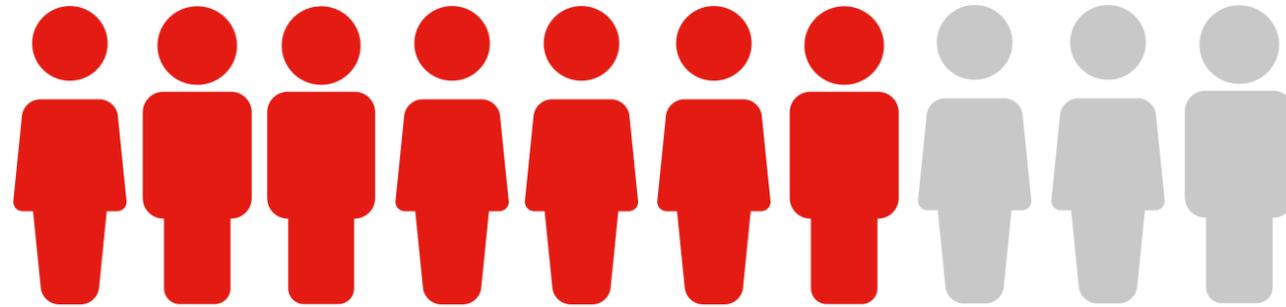
Coding, data management and algorithm monitoring

1.91%

Other, e.g. value, empathy, strategy, communication skills

10.19%

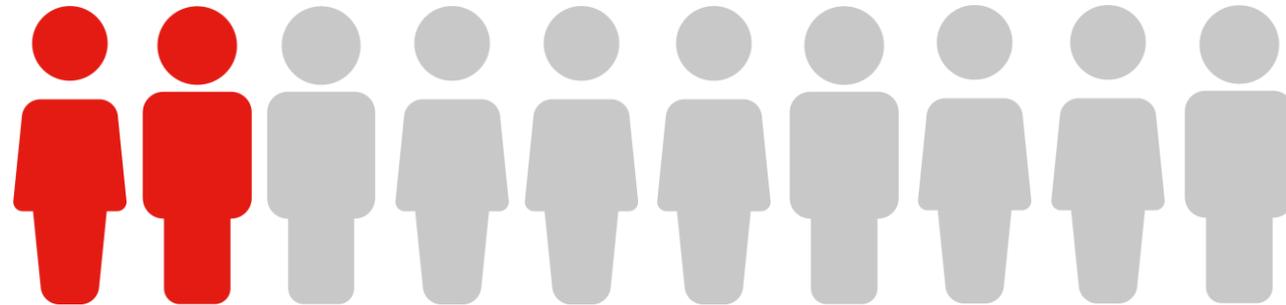
Q: Indicate the ratio of 'standard/routine' work as compared to 'bespoke/complex' work that best describes your practice



7 out of 10 respondents say they do more bespoke work than routine work.

This is a positive evolution as this marks an increase of 8.03% from 2016.

Q: Indicate the ratio of 'standard/routine' work as compared to 'bespoke/complex' work that best describes your practice



European lawyers say they do less routine work than bespoke work.

Only 2 out of 10 respondents say they do more routine work than bespoke work.
This is a positive evolution as this marks a decrease of 18.54% from 2016.



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4.

privatisation of
justice

The criminal justice system is sufficiently complying with the rule of law.

50.69%
2016

45.96%
2018

9.33%



The civil justice system is sufficiently complying with the rule of law.

61.65%
2016

54.43%
2018



Q: Do you think that the use of automated systems predicting with a high degree of certainty the possible outcome of a dispute ('predicative justice') will impact legal services and the justice system?

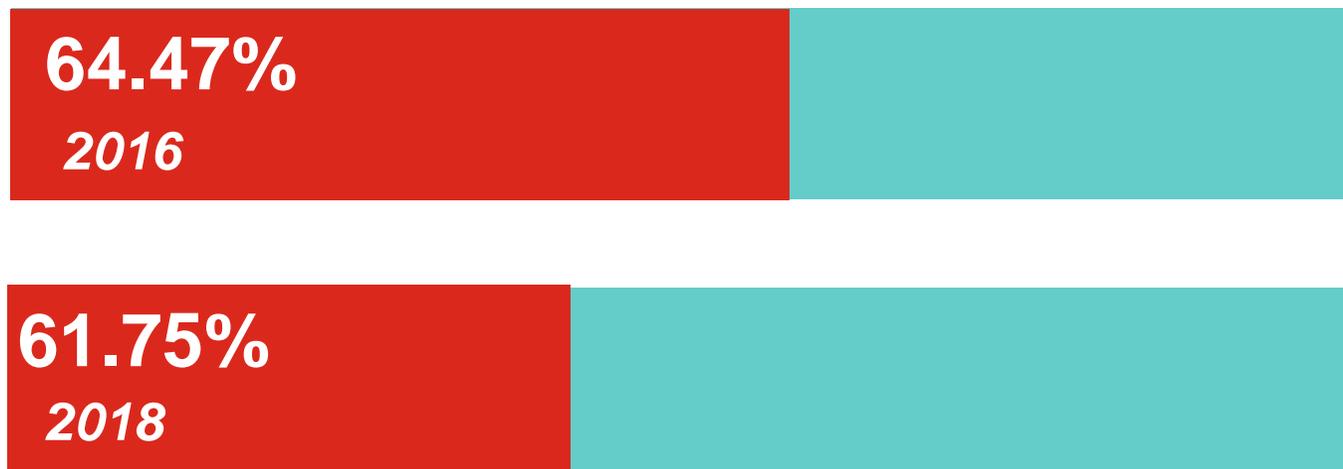


7 out of 10 respondents believe that the use of automated systems will impact legal services.



**This marks an increase of 5.02% from 2016.*

In the future, ODR systems will play an important role in conflict resolution



Q: *Have you already used online dispute resolution (ODR) systems?*



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9 out of 10 respondents haven't used ODR systems.

Only 9.46% said they have already used ODR, e.g. UDRP, WIPO, SGOA

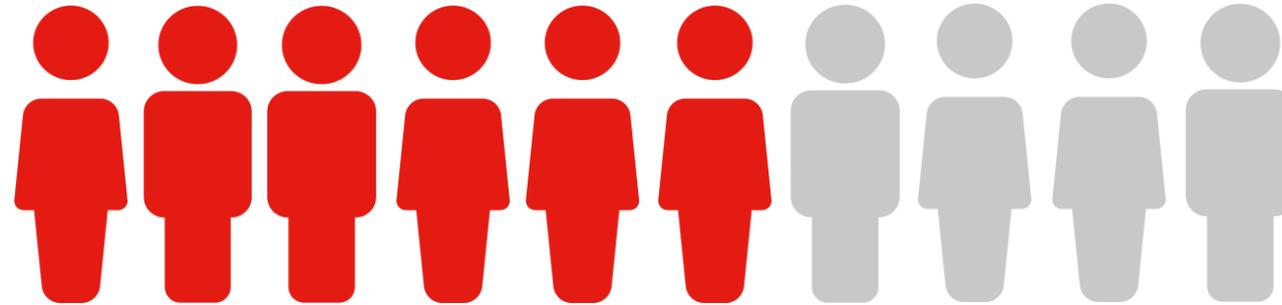
In the future, ADR systems will play an important role in conflict resolution.



Q: *Have you already used alternative dispute resolution (ADR) systems?*



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6 out of 10 respondents already used ADR systems.



**This marks an increase of 16.37% from 2016.*

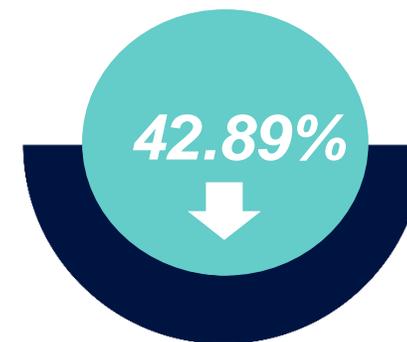


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5.

use of new
technologies

Compared to 2016, European lawyers seem less fearful of technology replacing human resources.





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New technologies integration within law firms (2018)

Website



Use of social media



Use of marketing tools



Legal search engines



Content management software



Collaborative tools for clients



Providing online legal services



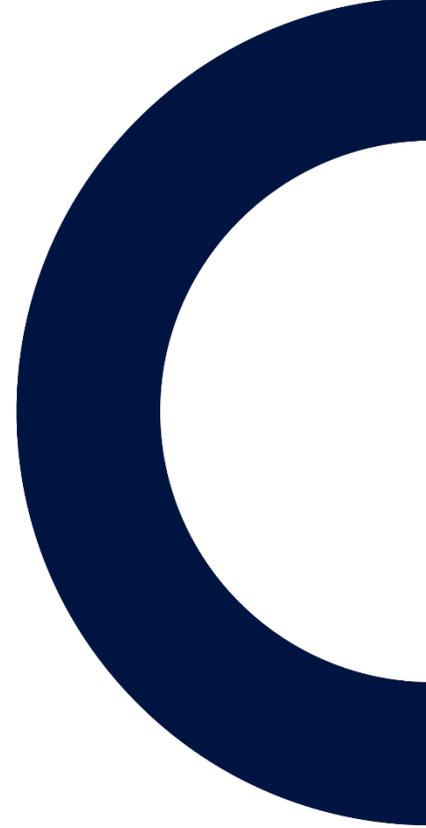
Use of Artificial Intelligence



Smart contracts/blockchain tech



Chatbots



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Appendix



**Knowledge
and know-how**



**Professional
cooperation**



**Professional and
personal
development**



**Global
network**

About **AIJA**

International Association of Young Lawyers

Founded in 1962, AIJA is the only global association dedicated to lawyers and in-house counsel below 45 years old.

www.aija.org



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AIJA Key Facts

01

4,000+

active members and supporters
in more than 90 countries
worldwide

02

700+

law firms of all sizes

03

60+

collective members

04

20

legal and business-related
commissions; and a Human
Rights Committee

05

20+

seminars and conferences
per year; and webinars