



EUROPEAN LANGUAGE INDUSTRY SURVEY 2024

Trends, expectations and concerns of the European language industry

ELIS Research
research@elis-survey.org

POWERED BY **ELIA** | **EMT** | **EUATC** | **FIT EUROPE** | **GALA** | **LIND** | **WOMEN IN LOCALIZATION**

Contents

- Preamble 3
- Executive summary 4
- Segment and country distribution of answers 5
- Industry structure and demography 7
 - Industry size..... 7
 - Stakeholder type and size 7
 - Gender distribution 9
 - Seniority..... 9
- Certification, affiliation and Industry information 10
 - Certification 10
 - Affiliation 11
 - Industry information 12
- Market holding its breath..... 13
 - Market performance 13
 - Market activity 13
 - Pricing and profitability 15
 - Other market indicators 17
- Industry sentiment 21
 - Language company investment mood 21
 - Independent professional sentiment 22
- Trends and challenges 23
 - Trends..... 23
 - Language service companies 23
 - Independent language professionals 24
 - Language departments..... 24
 - University staff and students 25
 - Challenges 25
 - Language service companies 25
 - Independent language professionals 26
 - Language departments..... 26
 - University staff and students 27
- Operational Practices 28
 - Areas of business..... 28
 - Geographic origin 28
 - Direct clients vs subcontracting 28

Services.....	29
Client domains.....	30
Operational changes	31
Independent language professionals	31
Language service companies.....	31
Language departments.....	32
Outsourcing practices.....	32
Language departments.....	32
Language service companies.....	33
Client relationships.....	34
Relations between independent language professionals and language companies	34
Dealing with technology.....	35
Technology implementation	35
University staff and students	35
Independent language professionals	36
Language departments.....	37
Language companies	38
Preferred tools	39
AI – The elephant in the room.....	40
AI in translation education	41
Working in the language industry	43
Language company staffing.....	43
Employment quality	44
Work from home	44
Work-life balance	44
Career satisfaction.....	45
Training and continuous professional development (CPD).....	47
Required skills.....	49
Language industry training landscape.....	50
Existing training programmes.....	50
Programme foci	50
Specialisations	51
Languages.....	51
Preparing for the language industry	52
Internships.....	52
Analysis methodology comments	54
Table of Figures	55

PREAMBLE

ELIS, the European Language Industry Survey, was initiated in 2013 by EUATC, the European Union of Associations of Translation Companies. Today, it is co-organized with ELIA, FIT Europe, GALA, the EMT university network, the European Commission's LIND group, and Women in Localization.

The survey covers market trends, expectations and concerns, challenges and obstacles, as well as changes in business practices. It is open to language service companies (LSCs), independent language professionals, training institutes, language service buyers, as well as private and public translation departments.

ELIS 2024 consists of 5 instead of the traditional 4 separate surveys built around a common core but tuned to the needs and interests of the various industry segments. The survey for training institutes was split into one for university staff and a separate one for students, which should help to better identify the needs and concerns of those that are the future of the industry.

2024 is a record edition which received 1,776 responses

- 919 from independent language professionals
- 170 from representatives of training institutions
- 352 from students in a translation-related training programme
- 78 from language departments and language service buyers
- 257 from language companies

Whereas previous editions monitored the impact of worldwide crises like Covid and the war in Ukraine, the 2024 survey had to pay particular attention to a different elephant in the room: artificial intelligence. A separate chapter of this report therefore addresses the perception, expectations and reality regarding AI in the various segments of the language industry.

EXECUTIVE SUMMARY

After the 'return to reality' last year, the ELIS 2024 data describe a market that is holding its breath, uncertain about the future.

The already toned down expectations for 2023 were once again not met. For the first time in ELIS history, a majority of language companies and independent professionals alike report a decline in both activity level and prices. It is therefore no surprise that both segments reduced their market expectations for 2024 even further, although a now smaller majority still thinks that it will grow.

The situation is, just as last year, not the same for all stakeholders nor in all countries. The data show considerable variations between individual countries and size segments, with smaller language companies and independent language professionals reporting significantly poorer results, and some countries thriving while others show negative results in line with local economic downturn.

The 2023 investment mood revival was unfortunately short-lived. The 2024 data show the lowest level of major investments (like acquisitions or opening new offices) since ELIS started monitoring this indicator in 2018.

With this low score, company participants basically indicate that they share the mood of independent professionals, who denounce in no uncertain terms the further decline of their financial position and seriously question their own ability to maintain a sustainable career in the profession.

This negative sentiment of independent professionals continues to be fuelled by a perceived lack of fair remuneration linked to the rise of post-editing which replaces higher paid and more rewarding traditional human translation. Many participants fear that widespread acceptance of AI by the general public will legitimize the use of MT and thereby accelerate this evolution.

Several dozens of professionals do expect (or hope) that the flaws in AI will re-ignite the appreciation for high quality human translation, but at this moment the data do not show obvious ways to counter the current trend. It did not help that audiovisual localization, which previous ELIS editions identified as a growth activity, suffered severely from the 2023 strike in Hollywood.

While the use of AI in the language industry is currently still in its infancy, the actual use of machine translation continues to increase. At the current pace, it is expected that some form of MT or AI will be used in more than 50% of professional translations by 2025.

Is it all doom and gloom then? That would be a bridge too far. The differences in performance indicate that specific language industry players and individual markets can thrive even in the current climate. Participants point to positive aspects such as an increased need for specialisation and more diverse language-related jobs, even if such jobs are relatively limited at present. And although participating language companies indicate that they have reduced staffing in 2023, their employees indicate that they still see the language industry as a reasonably good industry to work in.

But it will require more to turn the tide for independent language professionals and the majority of language companies that participated in ELIS 2024. A revival of the global economy, a more stable political climate, and finding a way to turn the technology evolution into a win-win partnership between the various industry segments seem to be required if we want to prevent further loss of talent and convince future students to pursue a career in this industry.

A tall order, that will require constructive co-operation of all stakeholders. No surprise that the industry is holding its breath.

SEGMENT AND COUNTRY DISTRIBUTION OF ANSWERS

Table 1 below shows between square brackets the minimum number of responses from LSCs and individual professionals that has been defined as a reliability threshold for each country.

Countries that exceed the threshold are highlighted in green. Countries that are highlighted in yellow or grey delivered less than 100% or less than 50% of the response threshold. Data from these countries should be analysed with caution.

	Companies	Individuals	Training institutes	Students	Buyers & lang depts
TOTAL	257	919	170	352	78

Europe					
Central & Eastern Europe					
Albania	[5]	2 [10]	1		
Bosnia-Herzegovina	[5]	1 [10]			1
Bulgaria	4 [5]	18 [10]	3	1	
Croatia	4 [5]	22 [10]	2	1	2
Czech Republic	10 [5]	17 [10]	2	35	3
Georgia	[5]	1 [10]			
Hungary	11 [5]	34 [10]	6	21	2
Kosovo	[5]	1 [1]			
North Macedonia	1 [5]	6 [10]	1	2	
Poland	11 [5]	12 [10]	5	14	3
Romania	3 [5]	26 [10]	10	11	
Russia	6 [10]	3 [20]			
Serbia	1 [5]	5 [10]	1		
Slovakia	4 [5]	7 [10]	8	12	
Slovenia	7 [5]	23 [10]	7		
Turkey	1 [5]	11 [10]	1		
Ukraine	3 [5]	10 [10]	7	1	
	66	199	54	98	11

Northern Europe & Baltics					
Denmark	3 [5]	9 [10]		1	1
Estonia	4 [5]	10 [10]	1	1	
Finland	2 [5]	15 [10]	5	24	7
Iceland	[5]	[10]			1
Latvia	2 [5]	15 [10]	4	4	
Lithuania	8 [5]	18 [10]	3		
Norway	[5]	9 [10]			1
Sweden	3 [5]	9 [10]			3
	22	85	13	30	13

	Companies	Individuals	Training institutes	Students	Buyers & lang depts
Western & Southern Europe					
Austria	8 [10]	33 [20]	15	34	5
Belgium	10 [10]	28 [20]	7	12	6
France	15 [10]	80 [20]	11	31	5
Germany	17 [10]	57 [20]	4	15	8
Greece	9 [5]	37 [10]	4	14	1
Ireland	1 [5]	30 [10]	1	2	1
Italy	25 [10]	140 [20]	24	45	2
Luxembourg	5 [5]	2 [10]			9
Malta	[5]	2 [10]	1		
Netherlands	10 [10]	35 [20]	5	5	3
Portugal	12 [10]	16 [20]	7	26	1
Spain	17 [10]	79 [20]	17	33	2
Switzerland	2 [5]	1 [10]		4	5
United Kingdom	23 [10]	79 [20]	2	1	3
	154	619	98	222	51

	Companies	Individuals	Training institutes	Students	Buyers & lang depts
Americas					
Argentina	1 [5]	1 [10]			
Brazil	1 [10]	[20]			1
Canada	1 [10]	1 [20]	1		
Mexico	[5]	1 [10]			
Paraguay	[5]	1 [10]			
USA	5 [10]	4 [20]	1		2
	8	8	4		3

Africa, Asia & Oceania					
Algeria	[5]	1 [10]	2		
Australia	[5]	2 [10]			
Cameroon	[5]	1 [10]			
China	[10]	[20]		1	
Egypt	[5]	[10]	1		
India	5 [10]	1 [20]			
South Africa	1 [5]	[10]		1	
Togo/Nigeria	[5]	1 [10]			
United Arab Emirates	[5]	1 [10]			
Vietnam	1 [5]	[10]			
	7	7	1	2	0

Figure 1 - ELIS 2024 responses per country and segment

INDUSTRY STRUCTURE AND DEMOGRAPHY

Industry size

As market research has shown repeatedly, the language industry is highly fragmented, with a strong majority of independent professionals and small to medium-sized language companies. Consolidation has however led to a growing class of larger language companies with revenues over 100 million euro and some approaching the billion euro mark.

How the market is divided between these various types of operators is highly uncertain due to the huge difference in estimates for the global language market, which varied from 25 to 60 billion euro for 2022 (resp. estimates by Slator.com and Nimdzi).

The ELIS survey does not claim to make any estimate of market size, even at a European scale. Such an estimate would be strongly biased due to a relative under-representation of the largest company size segment among the survey participants. It does however attempt to identify shifts between the various segments that are sufficiently represented in the data.

Stakeholder type and size

Language companies

With 919 responses from independent language professionals and 84% of language company participants representing companies with a revenue of less than 5 million euro, ELIS results reveal primarily the opinions, expectations and concerns of the very fragmented freelance and SME part of the industry, which is often disregarded in other market research.

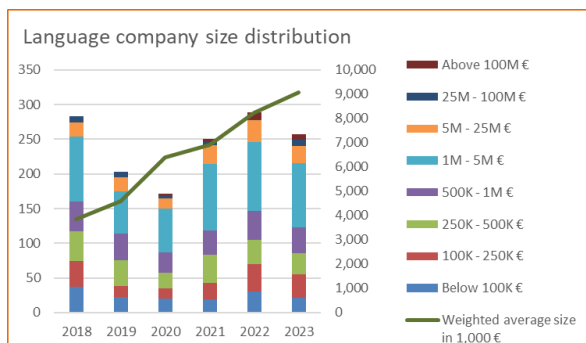


Figure 2 - Language company size

Among the language companies, the size segment between 1 and 5 million euro remains the dominant one with 36%.

Based on the median values of the segment sizes (e.g. 750,000 euro for the segment from 500,000 to 1 million euro), the average size of participating language companies has been steadily growing.

This year's growth reflects a higher number of participants in the largest size segment (17 above 25 million euro, compared to 11 in ELIS 2023).

Due to the anonymous nature of the survey however, it is not possible to determine the exact source(s) of the growth.

33% of participating language companies represent a woman-owned company. Woman ownership varies wildly, with 13 represented countries without woman-owned companies participating.

7% represent companies that are publicly listed or that have venture capital backing, which is significantly more than in 2023 (4%).

Language departments

Among the participating language departments the ratio between public and private organisations has changed considerably compared to ELIS 2023, with a higher participation of public agencies.

This has an impact on the results for a number of topics such as outsourcing, or focus.

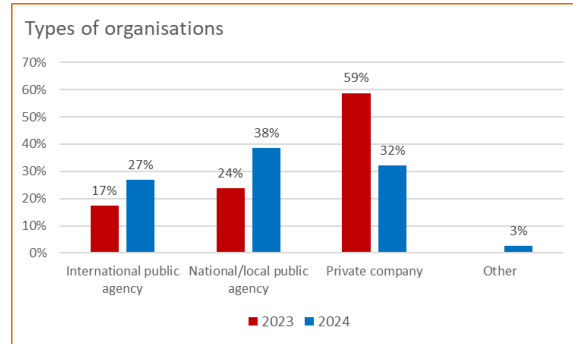


Figure 3 - Language department organisation type

The ratio between national and international companies has not changed, with 80% being international. The size ratio of private companies has shifted towards the highest segment, with 50% of participants' companies reporting more than one billion euro in revenue.

Training institutes

Of the 170 participating representatives of training institutes, 52% belonged to a university that is member of the EMT network and 41% to a non-member. Despite the fact that EMT membership continues to lack visibility and appreciation among language department and language company participants, survey results indicate that it does make a difference in specific areas such as professionalisation activities and technology usage.

7% of training institute participants indicate that they do not know if their institute is a member of the network.

Independent language professionals

For a 70% majority of the participating independent language professionals, freelance language work is their full-time activity. For two thirds of the 30% that work freelance on a part-time basis, it is their main occupation.

Based on this year's data, full time professionals are more likely to select a single main activity (translation or interpreting) rather than combining both.

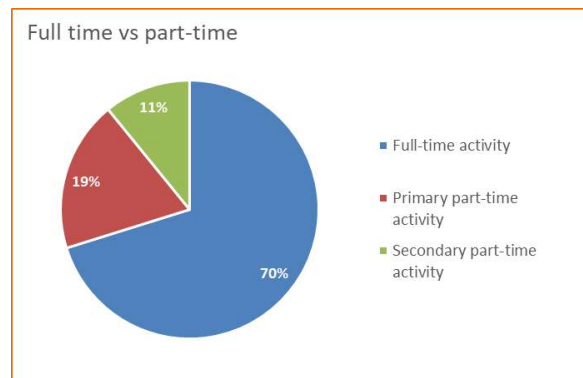


Figure 4 - Full-time vs part-time freelance

6% of the respondents indicate that they work exclusively as interpreters, which is identical to 2023 data.

4% of translators have also taken up interpreting work.

The data do not show any correlation between main role and gender, but do show a tendency for full-time professionals to choose just one main role (in particular translator) instead of combining both translation and interpreting.

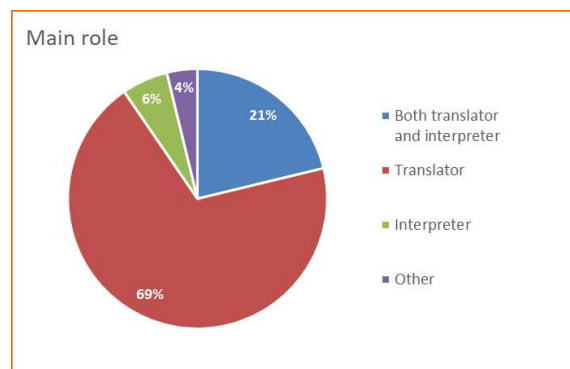


Figure 5 - Main activity of independent professionals

Gender distribution

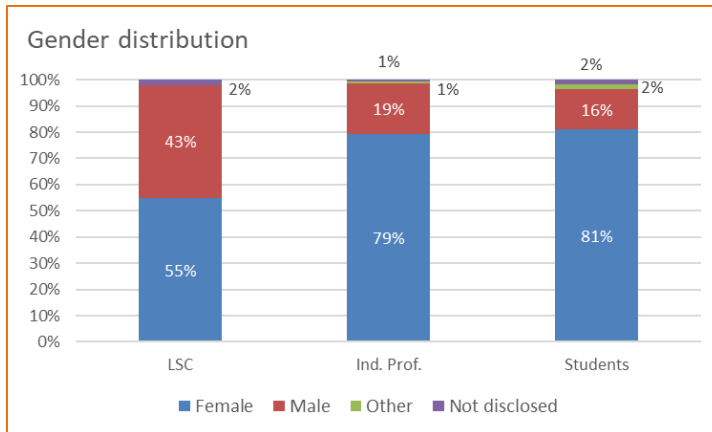


Figure 6 – Gender distribution

It is well known that the language industry is a woman-dominated industry, with 79% of respondents being female independent professionals; the figure for students was 81%.

Within LSCs, the gender distribution is much more balanced, with a 55% female representation.

Among company owners and general managers, there is no noticeable difference according to gender.

Seniority

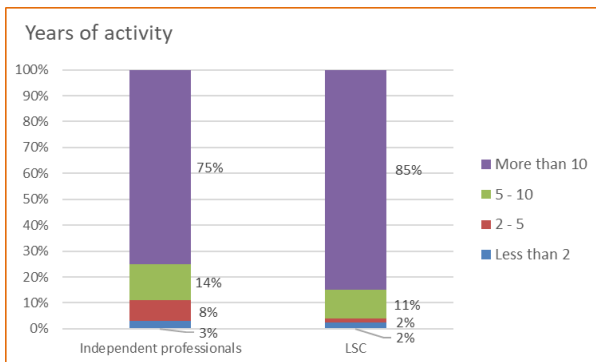


Figure 7 – Years of activity

Despite efforts to reach young professionals, average seniority increased among both language professionals and companies.

Unfortunately, this makes it difficult to make reliable statements about those that have only recently entered the industry.

CERTIFICATION, AFFILIATION AND INDUSTRY INFORMATION

Certification

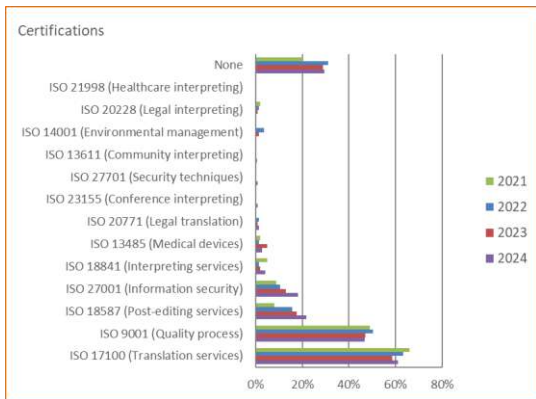


Figure 8 – Certification – language companies

ISO 9001 and 17100 certifications are stagnating at around the 60% and 50% level respectively.

Certification for post-editing has now exceeded the 20% mark ISO 27001 (information security) gained momentum in 2023 and is now approaching 20%, while the Medical device standard (ISO 13485) did not show any further growth.

The number of language companies that do not have any certification remains stable at approximately 30%.

As can be expected, the average number of certifications depends largely on company size. The data show an SME maximum in the 5 to 10 million euro segment.

The certification levels for the larger size segments need to be considered with some caution due to the small number of answers in these segments.

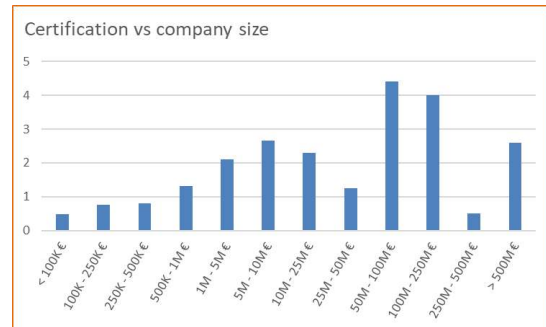


Figure 9 - Language company certification vs size

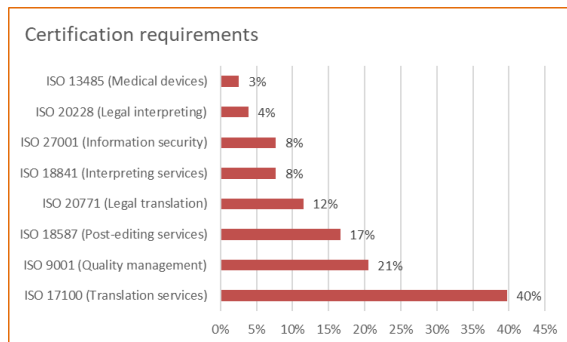


Figure 10 - Certification requirements - language departments

Language department certification requirements are in line with language company certification practices. 40% of language department participants indicate that their organisation requires ISO 17100 certification. The main exception is ISO 20771 (legal translation), which is required by 12% of the language department participants, but only reported by 2% of language company participants.

48% of language company respondents consider certification good value, while 15% are not satisfied, 33% neutral and 3% without any opinion on the matter. Only 15% of the dissatisfied participants are considering discontinuing low value certifications.

Affiliation

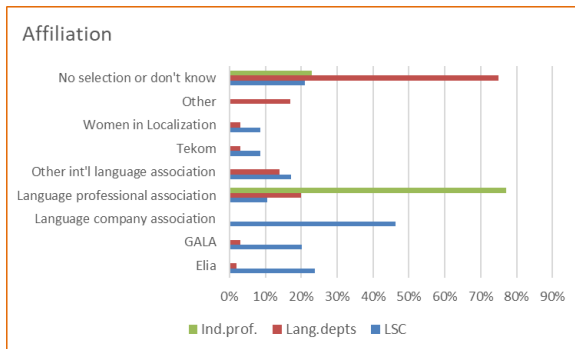


Figure 11 – Affiliation

Affiliation rates have not changed significantly compared to 2023.

Given that ELIS is supported by language industry associations, the affiliation rates of language companies and independent professionals cannot be considered representative for the language industry as a whole.

Affiliation rates are understandably much lower among language departments. 75% of these participants don't know or indicate that their organisation is not a member of any language industry association.

Language company data show a slight increase in overall affiliation level. Interestingly, the data shows the same correlation to company size, though less pronounced, as for certification (see Figure 8).

52% of language companies indicate that affiliation offers good value, mainly through networking and knowledge sharing.

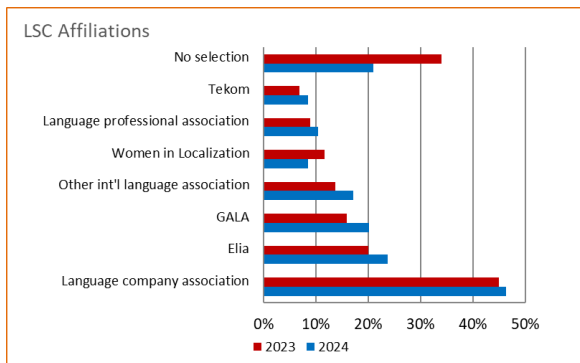


Figure 12 - Language company affiliations

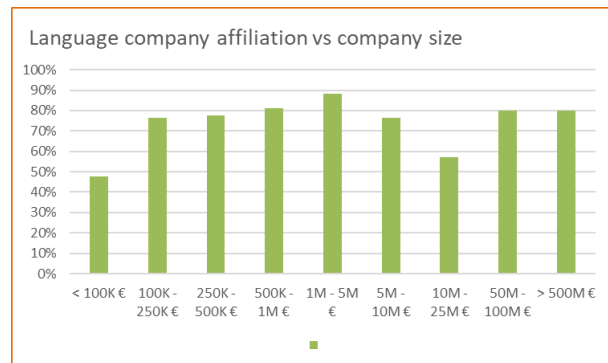


Figure 13 – Affiliations vs company size

Industry information

Independent professionals

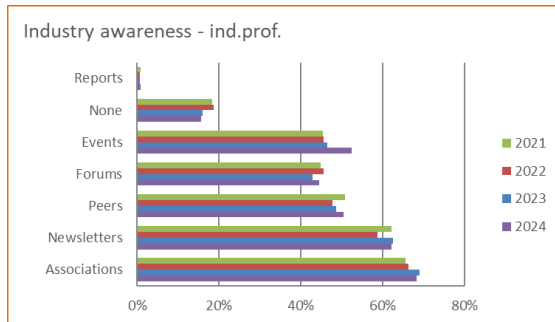


Figure 14 – Sources of industry information – independent professionals

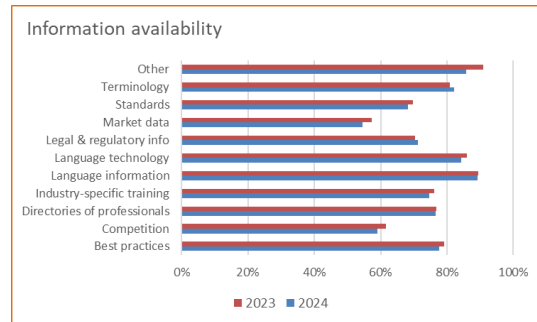


Figure 15 – Information availability – independent professionals

Independent professionals continue to use the same channels to get access to industry information. The variations are not significant. They also do not report significant changes in information availability. They continue to give market-related information the lowest availability scores.

University staff and students

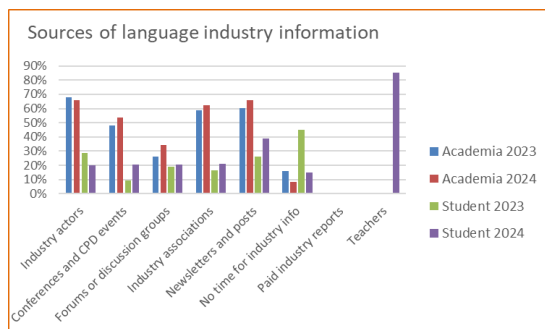


Figure 16 – Sources of industry information – university staff and students

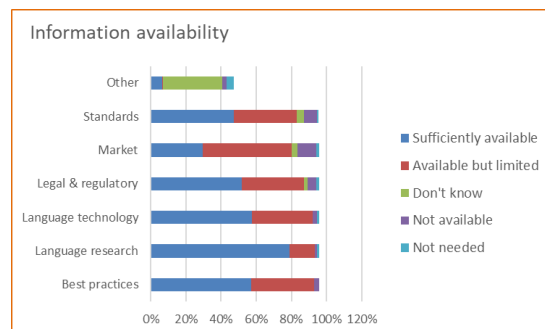


Figure 17 - Information availability – university staff

The interest in industry information has significantly increased among university staff and students.

Only 8% of staff report that they do not gather industry information (half of the 2023 score) and only 15% of students (45% in 2023).

It is important for teaching staff to realize that they are by far the main source of information about the language industry for their students (85%, with newsletters at a modest second place at 39%)!

Conferences and events are becoming more popular, also among students.

MARKET HOLDING ITS BREATH

The sense of insecurity that was showing in ELIS 2023 data did not diminish but instead grew stronger. It's as if the industry is holding its breath, waiting for what is going to happen in the global economy and what AI has in store.

Specific segments or countries continue to show success and optimism, but for the first time in ELIS history, a majority of language companies and independent professionals report negative activity growth and price drops, which shape 2024 expectations and industry sentiment.

IMPORTANT: *in the industry evolution charts below, percentages are not the percentage of increase or decrease experienced or expected, but the percentage of respondents that report an increase minus the percentage of respondents that report a decrease.*

Market performance

Market activity

In ELIS 2023 language company participants and independent language professionals reported a return to reality, with lower than expected performance in 2022. Their expectations for 2023 however remained solidly optimistic, both for the global industry and their own activity.

Almost net 60% of language company respondents and net 25% of independent professionals expected their own activity to grow in 2023.

An ongoing energy crisis, higher political tensions and even an unexpected strike in Hollywood took everybody by surprise.

LSC and independent professional participants now state that 2023 has the questionable honour to be the first year in ELIS history with negative growth of stakeholder activity (-1% of language companies and -4% of independent professionals).

These results motivated them to review their 2024 expectations for both the global market and their own activities.

Expectations for the global market remain positive with net 38% as the lowest score (from both independent professionals and language companies). University staff is the only segment that continues to show bullish expectations for the global market, contrary to students who are much less optimistic.

For their own activities language companies and professionals are much more pessimistic, with only net 10% of language companies and a mere net 3% of language professionals still expecting growth, a significant drop by 25% and 11% respectively. An 8% drop (from 18% in 2023 to 10%) can be noticed in the expectations by language departments.

These results are in line with the findings recently published in the [Slator 2024 Language Service Provider index](#), which showed flat organic growth among the larger language companies.

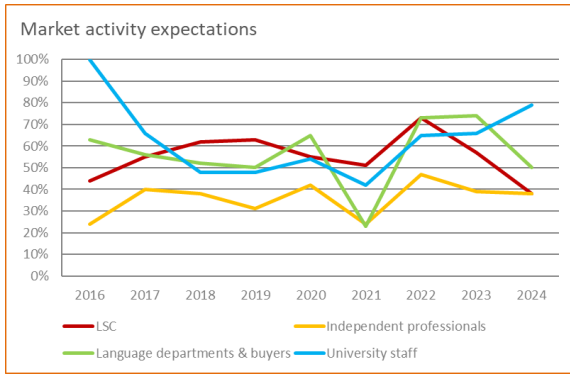


Figure 18 – Market activity expectations

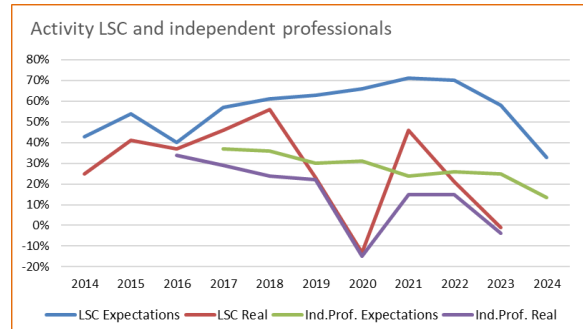


Figure 19 – Activity language companies and independent professionals

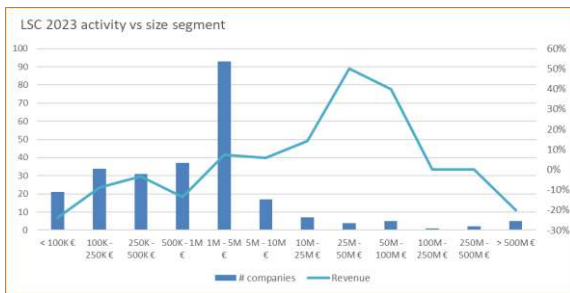


Figure 20 – Activity vs size segment

Small and medium sized language companies suffered, with those under 1 million euro reporting negative growth. Data hint at better results in the larger size segments, but the small number of answers in those segments make it difficult to draw reliable conclusions.

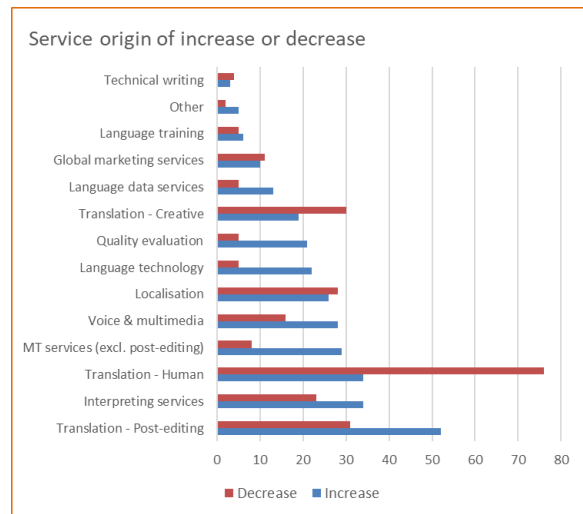


Figure 21 – Service origin of activity increase or decrease

Companies that reported negative growth named standard human translation as the activity that suffered most in 2023.

For those who reported positive growth, that same human translation was also the 3rd largest contributor to their growth, after post-editing and interpreting.

Voice & multimedia lost some of its growth aura due to the Hollywood strike but is still one of the main growth activities.

Creative translation and localisation, both considered positive growth activities in 2023, are now more on the negative growth side.

Growth focus lies on technology-rich activities such as MT services, language technology, language data services and even quality evaluation.

Pricing and profitability



Figure 22 - 2023 Price evolution



Figure 23 - 2024 Price expectations

Based on the price evolution in 2022, many language companies and independent professionals expected that the price increase would continue in 2023, while only a small majority of language departments agreed. The language departments had it right.

2023 price evolution was sobering, with a small (2%) but symbolically important majority of language professionals reporting a price drop instead of an increase, and language companies stating a status quo. Language departments agreed, with net 6% noting a price decrease.

This evolution is confirmed by the average word rates reported by language company participants (see Figure 25 below).

Paradoxically, a majority of language companies report an increase of buy-in rates, despite the decrease reported by language professionals. Based on free text answers from language professionals, one could assume that larger language companies exerted their stronger buying power to negotiate lower buy-in rates while smaller companies had to accept higher ones.

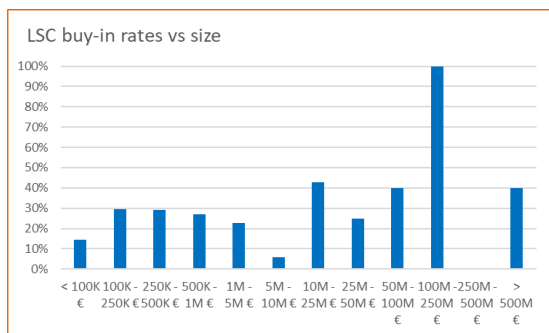


Figure 24 - LSC buy-in rates vs size

This assumption cannot be confirmed.

The survey's results do not show any size bias in buy-in rate evolution.

Data from the larger size segments do need to be used with caution due to the much smaller number of answers from these segments.

Average pricing

	# answers translation/word	Translation / word 2024	Translation / word 2023	Translation/word variation	Translation/hr 2024
Argentina	1	0.06	0.1	-0.04	
Austria	6	0.19	0.2	-0.01	64
Belgium	10	0.13	0.15	-0.02	57
Brazil	1	0.05	0.05		35
Bulgaria	3	0.07	0.07		24
China	1	0.04		0.04	15
Croatia	3	0.08	0.07	0.01	20
Czechia	6	0.06	0.08	-0.02	86
Denmark	2	0.22	0.14	0.08	20
Estonia	1	0.05	0.06	-0.01	70
Finland	1	0.21	0.18	0.03	40
France	12	0.14	0.12	0.02	60
Germany	11	0.17	0.18	-0.01	22
Greece	9	0.08	0.09	-0.01	23
Hungary	9	0.08	0.09	-0.01	15
India	5	0.06	0.07	-0.01	
Ireland	1	0.12	0.2	-0.08	33
Italy	21	0.14	0.13	0.01	20
Latvia	2	0.06	0.04	0.02	25
Lithuania	7	0.07	0.08	-0.01	60
Luxembourg	1	0.18		0.18	68
Netherlands	8	0.15	0.15		25
North Macedonia	1	0.06	0.06		25
Poland	4	0.05	1.29	-1.24	25
Portugal	10	0.09	0.09	0	25
Romania	3	0.07	0.08	-0.01	25
Russia	3	0.06	0.05	0.01	20
Serbia	1	0.06	0.07	-0.01	18
Slovak Republic	3	0.06	0.08	-0.02	22
Slovenia	6	0.09	0.1	-0.01	35
Spain	12	0.09	0.1	-0.01	30
Sweden	1		0.19		45
Switzerland	1	0.15	0.4	-0.25	100
Turkey	1	0.08	0.07	0.005	19
Ukraine	2	0.06	0.06		45
UK	13	0.14	0.13	0.01	45
USA	3	0.17	0.21	-0.04	50
Global median		0.101	0.149		37

Figure 25 - Average pricing – language companies

Only the countries with data in green provided enough answers to the question to determine a reliable average. The other countries are included for completeness only.

Language company participants saw their profitability drop even further in 2023. A tiny but important majority reported a lower profitability than in 2022.

Net 28% of participating companies expect profitability to increase again in 2024, which is much less than the 50% score in the two previous years.

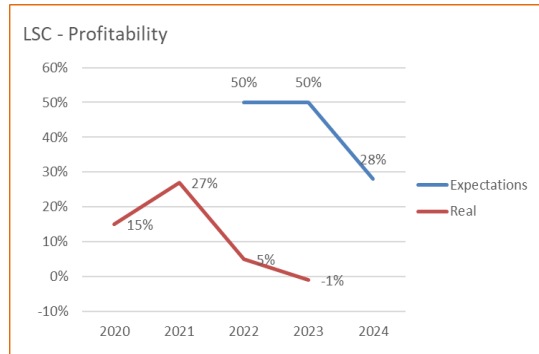


Figure 26 – Profitability – language companies

Important note: The answers to the profit margin question (gross margins for translation and interpreting, as well as earnings before taxes) do not confirm this perceived drop in profitability. Those data indicate that profitability levels have not changed.

The perceived drop in volume and profitability inevitably has an impact on investment and staffing. Investment levels dropped further to net 9% and company participants reported net shrinkage of staffing levels in 2023 (28% reported lower staffing levels, 20% reported higher levels), with only meager restaffing expectations (3%) for 2024.

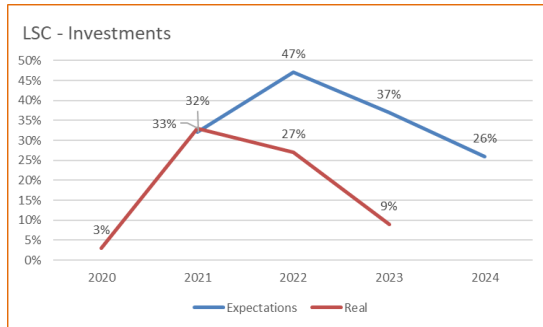


Figure 27 – Investments – language companies



Figure 28 – Staffing – language companies

Other market indicators

ELIS 2024 also paid attention to indicators other than the main financial ones discussed above.

For each market segment, other indicators are important. Below is an overview of all the indicators for which data were gathered from the various stakeholder types.

Language companies

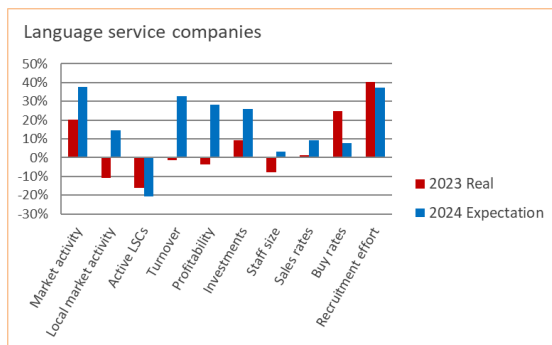


Figure 29 - All market indicators - language companies

Participants saw their local market activity as well as the number of language companies in that market decrease, and expect a further decrease in company numbers in 2024.

Despite this decrease in activity, recruitment efforts remain significant and do not show signs of easing off, although recruitment is not identified as a major challenge (see Figure 51).

ELIS 2024 confirms the strong geographic differences in language company performance that the previous edition already revealed.

Country-specific performance differences

Note: check the reliability of country-specific data in the table showing the number of answers per country.

	Global market	Local market	Active local LSCs	Revenue	Profitability	Investments	Staff size	Sales rates	Buy rates	Recruitment effort
Argentina	100%	100%	100%	0%	0%	0%	0%	-100%	-100%	0%
Austria	25%	0%	25%	-13%	-50%	38%	-25%	0%	0%	13%
Belgium	-20%	-40%	-50%	-80%	-40%	-20%	-50%	0%	0%	50%
Brazil	0%	-100%	100%	-100%	-100%	-100%	0%	-100%	100%	100%
Bulgaria	75%	0%	0%	50%	25%	50%	50%	75%	75%	100%
Canada	0%	0%	0%	0%	-100%	-100%	0%	0%	0%	0%
China	0%	0%	100%	-100%	-100%	-100%	100%	-100%	-100%	100%
Croatia	25%	0%	0%	50%	25%	25%	0%	25%	50%	50%
Czechia	20%	0%	-10%	10%	0%	0%	-30%	10%	50%	20%
Denmark	33%	0%	0%	33%	-33%	33%	0%	33%	33%	33%
Estonia	0%	-75%	0%	-75%	-75%	0%	-25%	-25%	50%	75%
Finland	100%	0%	0%	0%	50%	100%	50%	0%	50%	100%
France	27%	13%	-20%	47%	13%	13%	20%	0%	13%	40%
Germany	29%	-12%	-53%	-24%	12%	29%	-29%	35%	18%	47%
Greece	0%	-33%	0%	22%	11%	22%	-22%	-67%	33%	56%
Hungary	-36%	-27%	-18%	-18%	-36%	-9%	-27%	27%	73%	36%
India	80%	60%	40%	40%	40%	20%	40%	0%	40%	60%
Ireland	-100%	-100%	0%	-100%	-100%	0%	0%	0%	0%	-100%
Italy	24%	-32%	-20%	-12%	-20%	8%	8%	-32%	20%	36%
Latvia	-50%	-50%	-100%	-50%	-100%	-50%	-100%	100%	100%	100%
Lithuania	13%	-13%	-13%	13%	38%	13%	-25%	38%	75%	50%
Luxembourg	20%	20%	0%	20%	20%	20%	-40%	-40%	0%	-20%
Netherlands	40%	-20%	-50%	-30%	-30%	0%	-20%	20%	-10%	40%
North Macedonia	0%	0%	0%	100%	100%	0%	0%	0%	100%	100%
Poland	55%	45%	36%	55%	18%	36%	-9%	18%	73%	45%
Portugal	-8%	-33%	-25%	-8%	-25%	-50%	-33%	-25%	8%	17%
Romania	33%	0%	-67%	67%	33%	0%	33%	0%	33%	67%
Russia	-50%	-100%	-50%	-50%	-17%	-83%	-17%	-17%	33%	17%
Serbia	-100%	-100%	0%	-100%	-100%	-100%	0%	0%	100%	100%
Slovakia	-25%	-50%	-25%	0%	0%	25%	0%	0%	0%	0%
Slovenia	43%	29%	0%	43%	0%	29%	43%	14%	29%	43%
Spain	29%	-12%	-18%	-35%	6%	6%	-18%	-18%	0%	47%
Sweden	67%	-33%	-100%	0%	0%	33%	-33%	-67%	-67%	0%
Switzerland	100%	0%	-50%	-100%	-100%	0%	-100%	0%	-50%	50%
Turkey	0%	0%	100%	100%	0%	0%	0%	100%	100%	0%
Ukraine	67%	0%	-100%	100%	0%	33%	100%	0%	33%	67%
United Kingdom	38%	33%	0%	8%	29%	42%	8%	33%	25%	50%
USA	40%	20%	-20%	40%	60%	20%	40%	-40%	-20%	40%

Figure 30 - 2023 performance per country – language companies

Independent language professionals



Figure 31 - All market indicators - independent professionals

A majority of language professional respondents expect a further increase in competition although fewer participants expect the increase in the number of professionals to continue.

Certification requirements are not a major theme anymore, contrary to the rise of technology – MT but even more so AI. These aspects will be covered in detail in the Trends and Technology sections of this report.

Language departments

Language departments expect competition between language providers to continue to increase, even more than reported by language professionals. The expected further drop in budget is likely to fuel competition even more.

Certification is not expected to be an issue anymore, but data security certainly is.

Workload is expected to increase, but with shrinking budget, recruitment efforts will be a non-issue.

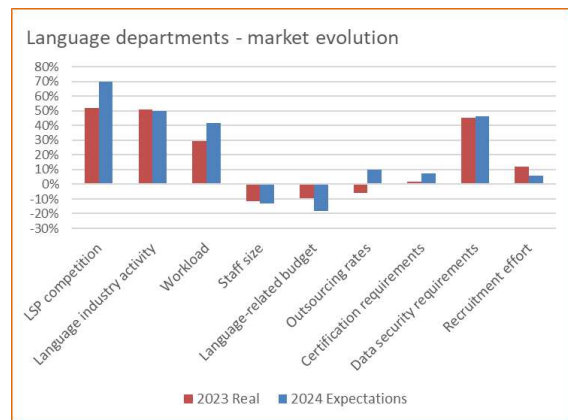


Figure 32 - All market indicators - language departments

These global results hide considerable differences between the various organisation types. A comparison with 2023 shows a significant shift in expectations of the national or local agencies and the private enterprises. The international public agencies continue to show themselves to be more pessimistic in terms of workload, staffing and budget availability.

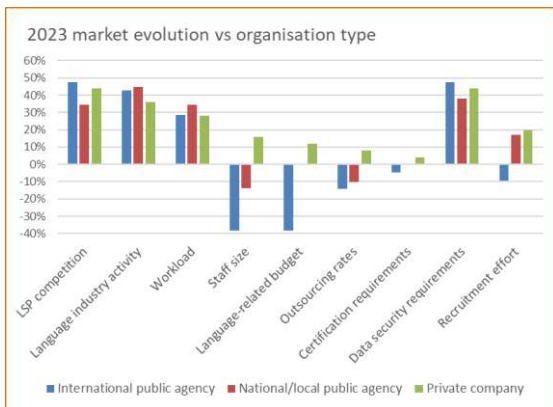


Figure 33 - 2023 market performance - language department organisation types

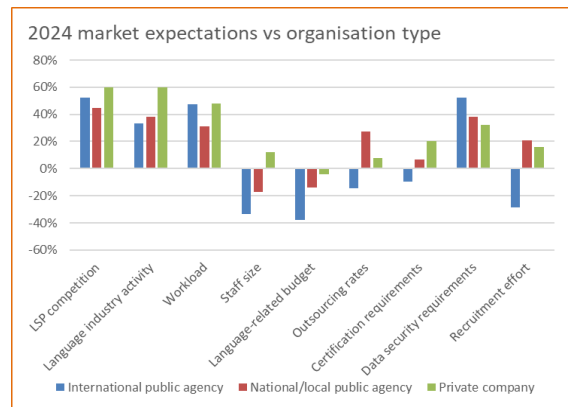


Figure 34 - 2024 market expectations - language department organisation types

University staff and students

ELIS 2024 introduced a separate questionnaire for students to better capture their opinions and concerns.

Some indicators for 2024 expectations are common to students and university staff, while others are different.

With their low growth score for Employment potential, which is very much in line with the expectations of language companies and language departments, students show that they do have a fairly correct view of the language market. This is likely linked to a stronger interest in industry information (see Figure 16).

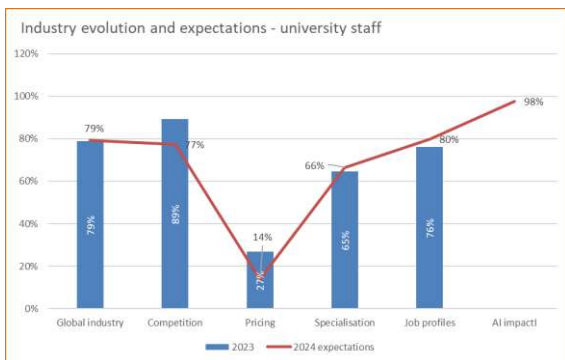


Figure 35 - Industry indicators - university staff

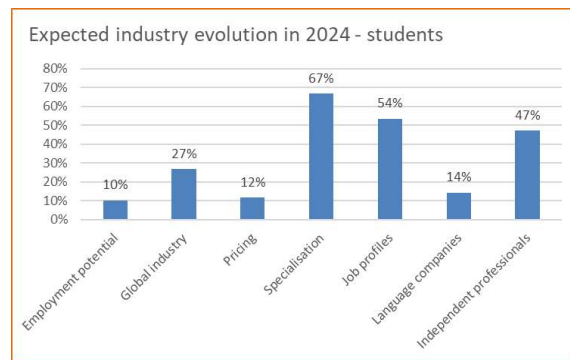


Figure 36 - Industry indicators - students

According to university staff, 2023 was a difficult year on academic level, with a further drop in student numbers and budget and a record high level of administrative constraints.

Despite this situation, they expect (or hope) that 2024 will bring more stable budgets and student numbers, but they do not have high hopes in terms of administrative workload.

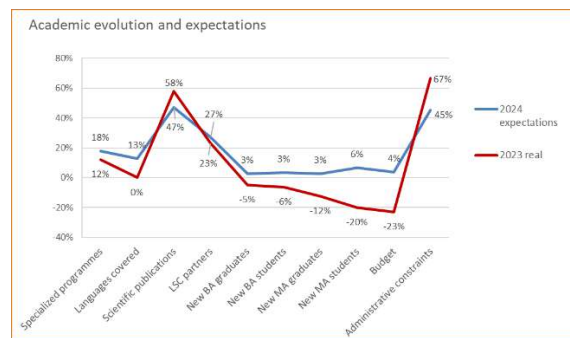


Figure 37 - Academic indicators - university staff

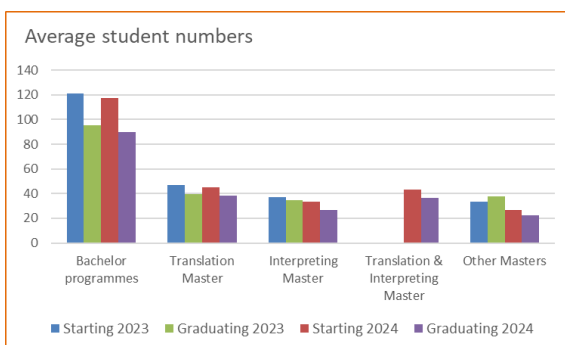


Figure 38 - Student numbers

The student number estimates do not entirely support the hopes for more stable numbers in 2024.

They do however support the shift towards a combined translation & interpreting masters' degree as also indicated in the training landscape section.

INDUSTRY SENTIMENT

Language company investment mood

Sentiment > 0,5 = Green. Sentiment < 0 = Red. Other = Yellow. Number of total responses below threshold = Grey.

	Owner answers	Investment	Disinvestment	2018	2019	2020	2021	2022	2023	2024
Austria	6	5	2	0.67	1.30	0.70	0.30	0.89	1.50	0.50
Belgium	6	5	2	0.62	0.57	0.80	0.70	0.92	0.43	0.50
Bulgaria	3	2	0	-0.25	1.00	1.00	0.30		1.00	0.67
Croatia	1	0	0	0.53	1.07	0.20		0.38	0.00	0.00
Czech Republic	3	2	0	1.40	1.20	0.50	1.00	1.33	1.00	0.67
Denmark	2	4	0	0.00	1.00	1.00	0.50	2.00	2.00	2.00
Estonia	1	1	0	0.67	0.80	0.80	1.10	1.00	0.50	1.00
France	11	12	3	1.1	0.53	0.7	0.00	0.00	0.82	0.82
Germany	12	15	2	0.80	0.89	1.60	0.40	0.88	0.75	1.08
Greece	5	6	0	0.70	1.20	0.70	1.00	0.50	1.43	1.20
Hungary	9	9	2	1.00	0.88	0.70	0.00	0.67	0.62	0.78
Ireland	1	0	2						1.05	-2.00
Italy	19	17	6	0.91	0.76	1.30	1.00	0.47	0.29	0.58
Lithuania	6	1	3		0.71	0.80	1.20	1.20	0.89	-0.33
Netherlands	7	7	5	1.27	1.42	1.00	0.90	0.75	1.00	0.29
North Macedonia	1	0	0						1.38	0.00
Poland	9	8	0	1.00	0.80	0.40	0.00	0.70	1.50	0.89
Portugal	10	10	3	0.92	1.18	1.00	0.70	0.44	-0.50	0.70
Romania	3	3	0	0.71	0.43	1.00	1.20	1.00	1.00	1.00
Russia	2	1	2	2.00	0.86	2.00	0.60	1.00	1.60	1.00
Serbia	1	0	0						0.54	0.00
Slovak Republic	3	2	0	0.60	0.67	1.00	1.00	1.00	1.75	0.67
Slovenia	5	4	1	1.36	1.44	0.90	0.20	1.17	2.00	0.60
Spain	15	10	6	0.76	0.56	0.70	0.10	0.47	0.50	0.27
Sweden	3	2	0	1.00	0.67	1.7	0.00	2.00	1.33	0.67
Switzerland	2	1	0	2.00	2.00	0.00		2.00	0.60	0.50
Turkey	1	0	0	1.22	0.00	2.00			1.33	0.00
Ukraine	3	4	0	2.00	2.00		2.00		0.97	1.33
United Kingdom	15	17	4	0.53	1.10	0.80	0.80	0.74	0.60	0.87
USA	1	2	0		0.67	1.50	0.67	1.50	1.33	2.00
				0.94	0.95	0.95	0.65	0.84	0.97	0.61

Figure 39 – Investment mood - language companies

With market activity, price and profitability levels declining, it is no surprise that language companies are not in a bright investment mood, but an all-time low, even lower than in Covid 2020, was not expected either, especially since ELIS 2023 showed a restored sentiment at pre-Covid levels.

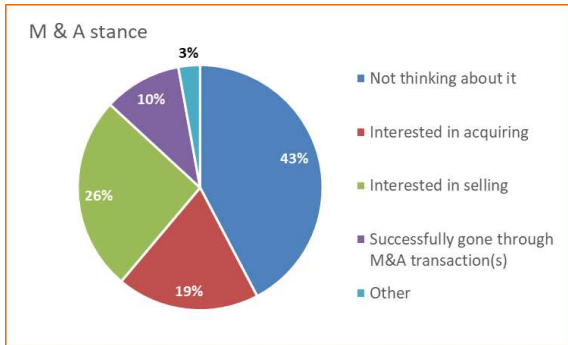


Figure 40 - M&A stance - language companies

This low confidence in the language company community is confirmed by the M&A stance answers, which show a higher interest in selling the company (26% vs 21% in 2023) than in acquisitions (19% vs 33% in 2023).

Independent professional sentiment

The above LSC investment mood mimics negative sentiment expressed by independent language professionals.

Participants express less confidence in being able to build a sustainable future on their freelance language work. With a drop from 63% to 51%, especially those with more than 10 years activity are clearly questioning their professional future.

Only those that are just starting their activity show an increased level of confidence.

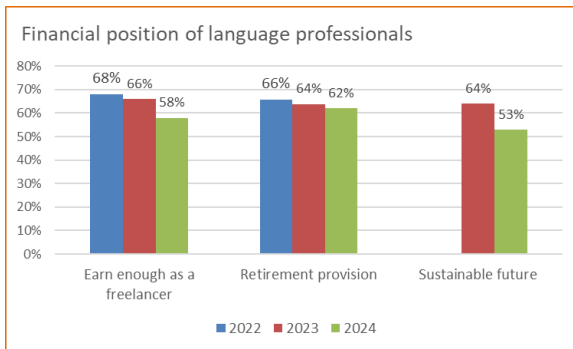


Figure 41 - Freelancing as a sustainable activity

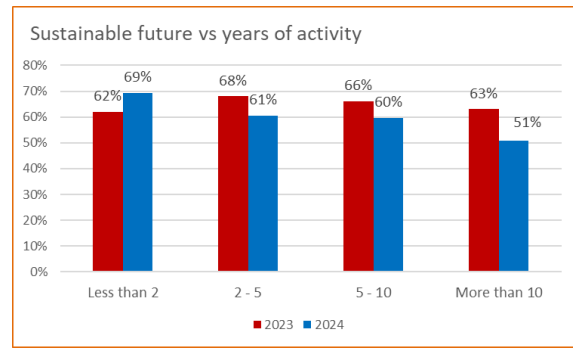


Figure 42 - Freelancing as a sustainable activity vs seniority

This loss of confidence is strongly linked to a general decline of their financial position, but also to the impact of technology and the perceived dominance of language companies which forces language professionals to accept less rewarding and lower paid work (mainly post-editing instead of human translation) which also negatively impacts their work-life balance. The trend and challenge section below provides a closer analysis of these concerns.

TRENDS AND CHALLENGES

Trends

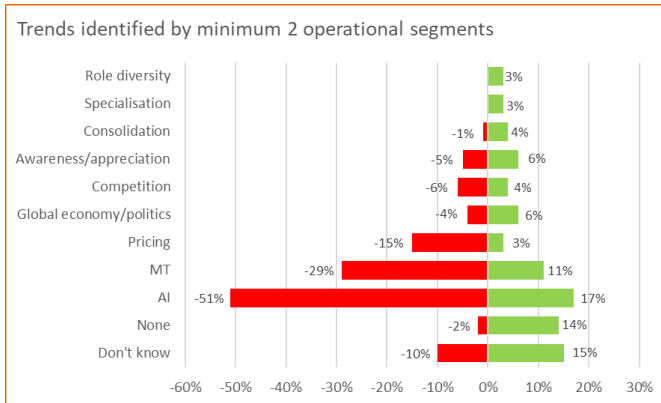


Figure 43 - Trend opinions – all industry segments

What everyone expected, happened. Artificial Intelligence eclipsed all other trends in the minds of language industry stakeholders, which is similar to 2021 when MT was in the driver's seat.

Only AI, MT, pricing and, to a certain extent, the global economy are prominently present in the answers of all segments.

There is a strong correlation between the two main technology trends and the pricing concern.

A more in-depth analysis of this correlation is included in the technology section of this report.

Trends are largely dependent on the industry segment. A trend may have a strong impact in one specific segment and be insignificant for another (e.g. role diversity), and a positive trend for one segment may be perceived as negative by another (e.g. language company participants see consolidation mainly as a positive trend, while it is clearly a negative one for independent professionals).

Even within the same segment, participants may have different opinions (positive or negative) about a specific trend (e.g. pricing, competition).

The trend opinions of the separate industry segments are included below.

Language service companies

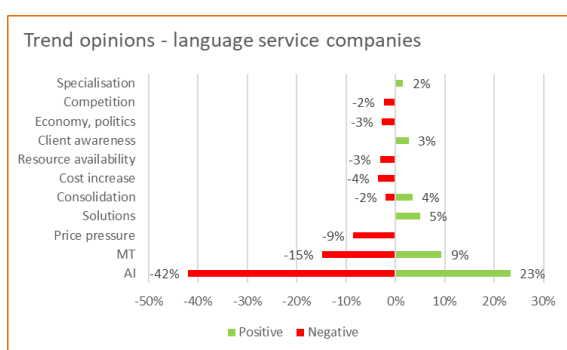


Figure 44 – Trends opinions - language companies

Language companies' top 3 is the same as for the industry as a whole, but just like language departments (see below) LSCs take a less negative position in the AI/MT discussion. No less than 23% of the LSC participants see the potential of AI technology to achieve efficiencies.

Consolidation in the industry is seen primarily as a positive evolution, though a number of LSC participants do see it as a threat to their own activity.

Quite a few language companies expect the need for more complex solutions to increase, but the traditional *More demand* trend only gathers 1% of the answers - a historic low – and therefore disappeared from the chart above.

Independent language professionals

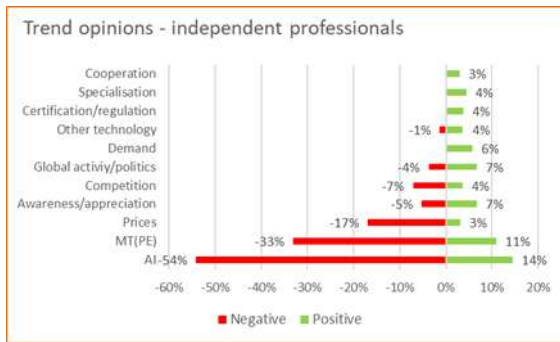


Figure 45 - Trend opinions - independent professionals

Among independent language professionals, the number of positive opinions about AI (and MT) is much lower than among the other industry segments. It is in this segment that the link between technology and pricing is expressed most clearly.

Those who see AI as a positive trend, mention 3 ways to take advantage of AI: as a tool (e.g. terminology extraction), as a source for editing work, and as a motivator for clients to choose human translation due to bad AI experiences.

Other expectations (or fears) have to do with waning appreciation for the human language professional – although more participants expect (or hope for) a boomerang effect as a result of AI/MT flaws.

Competition is as usual identified as a negative trend, but a relatively high number of participants expect competition to decrease due to professionals (some also mention agencies) leaving the industry.

Independent professionals are more positive about the global economy than language companies. Several participants explicitly mentioned the end of the Hollywood strike as a reason for optimism.

3% of participants – just within the scope of the above chart – reported stronger cooperation between professionals and a higher awareness of the need to defend professionals’ interests.

Some participants expect the industry to evolve towards a bipolar market with one end focusing on *premium* language services and the other on industrial-scale AI/AT work.

Language departments

Language department participants show the highest number of positive opinions for both AI and MT. For MT there is virtual parity between positive and negative opinions.

Not surprisingly, pricing (the #3 global trend) is absent from the language department chart. Its place is taken by budget and staff constraints that these departments are facing, together with an increased workload.

Language departments share the language professionals’ concerns regarding appreciation, which are also linked to sometimes unrealistic expectations of their internal clients.

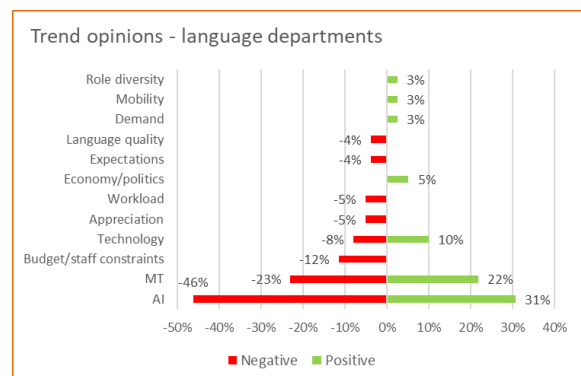


Figure 46 – Trend opinions - language departments

University staff and students

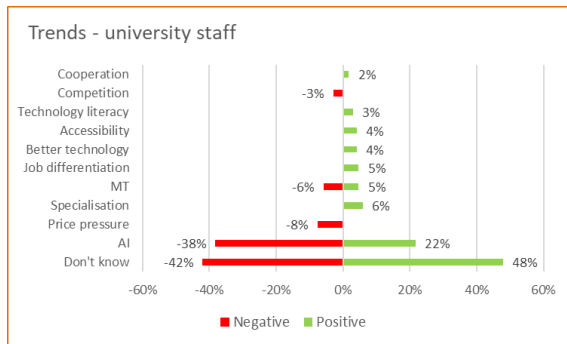


Figure 47 – Trend opinions – university staff

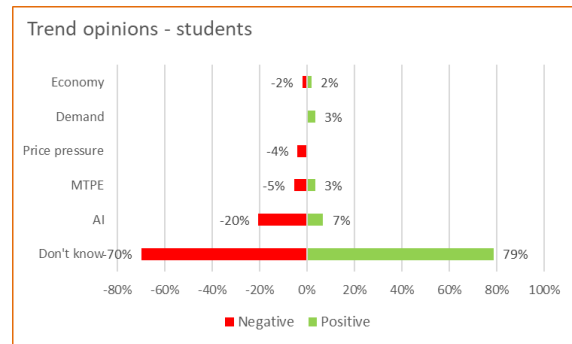


Figure 48 – Trend opinions - students

The most striking element in the trend opinions of training institutes – both among the university staff and the students – is the extremely high number of participants that did not answer the trend questions or indicated that they could not think of any specific trend. Given the much higher than before industry awareness level, this is surprising.

Those that did answer the question identify AI and MT as the main trends, both in the positive and in the negative sense. Price pressure is present as well. Other trends that are identified more than occasionally, in particular by university staff, include specialisation, job differentiation and accessibility.

Challenges

Closely linked to the trends identified by the various stakeholders are the challenges they are facing.

Below is an overview of the challenges reported by each of the segments.

Language service companies

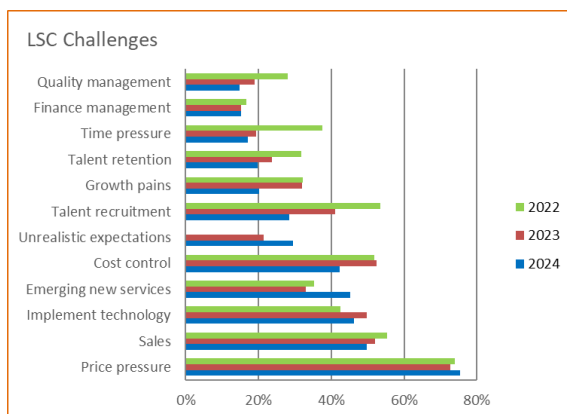


Figure 49 - Challenges - language companies

While price pressure remains unchanged as top challenge for language companies, the data show an increased concern about how to handle emerging new services.

Workload-driven challenges such as time pressure or talent recruitment/retention are perceived as less painful. The same is obviously the case for the growth pain challenge.

Unrealistic expectations on the other hand are more often flagged as a challenge. Whether this is linked to unrealistic expectations about MT and AI cannot be confirmed.

Independent language professionals

The stress factors of independent professionals are dominated by their financial situation. In the free text comments, the focus lies on rates and negotiaton difficulties which lead to insufficient income to cope with the ever-rising cost of living.

In most comments, the financial issue is linked to the rise of machine translation and artificial intelligence and the replacement of human translation with less rewarding post-editing work at substantially lower rates.

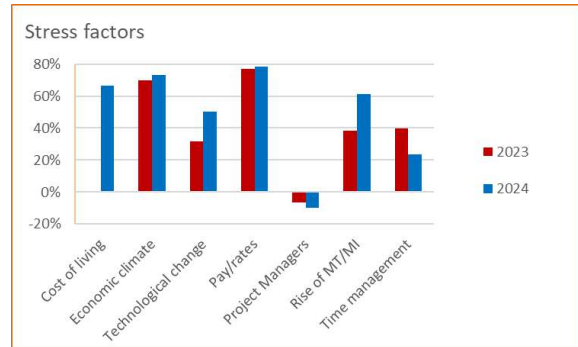


Figure 50 - Stress factors of independent professionals

Professionals state that this change in remuneration, combined with lower work volumes, forces them to accept more work when it is available, which in turn makes it difficult to achieve a good work-life balance.

In this light, the lower score of time management takes on a less positive meaning, as it may simply be the result of a lower workload.

Language departments

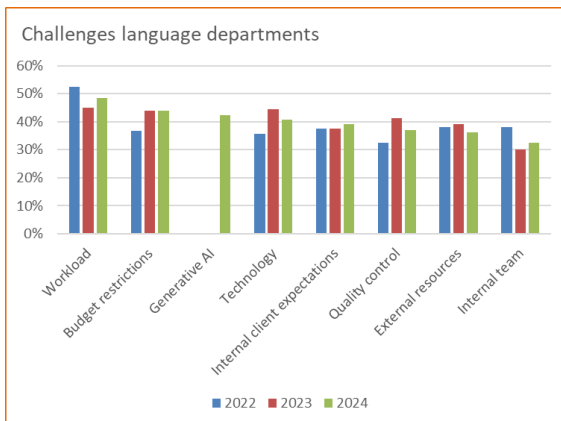


Figure 51 - Challenges - language departments

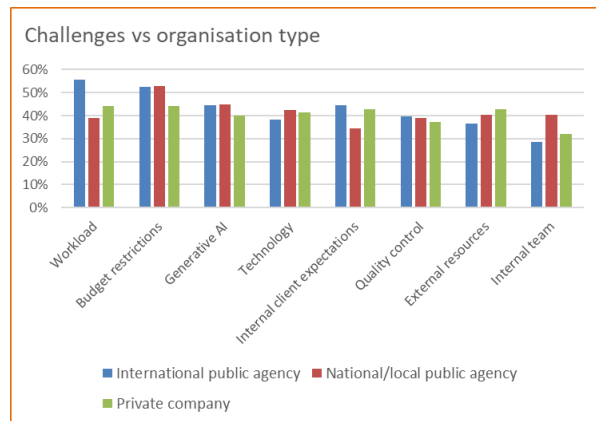


Figure 52 - Challenges – type of language department organisation

Among language departments, we continue to see considerable differences in challenge levels between the various types of organisations. Whereas workload is the top challenge for international public agencies, this is hardly the case for their national or local colleagues, who are more concerned about virtually all other topics.

University staff and students

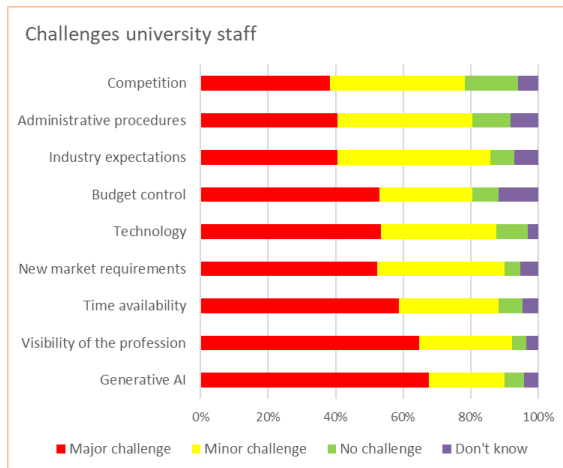


Figure 53 - Challenges - university staff

Generative AI and how to implement it in the universities' programmes has taken the challenge chart of university staff by storm, topping even their concerns about the visibility of the profession and the eternal lack of time.

For students, handling AI or other types of technology is much less of a challenge. They remain primarily concerned with their professional future, and how to combine their studies with their professional activities. Even finding suitable internships – an issue that one would have expected to have been solved after all these years – scores higher on the student challenge list than dealing with generative AI.

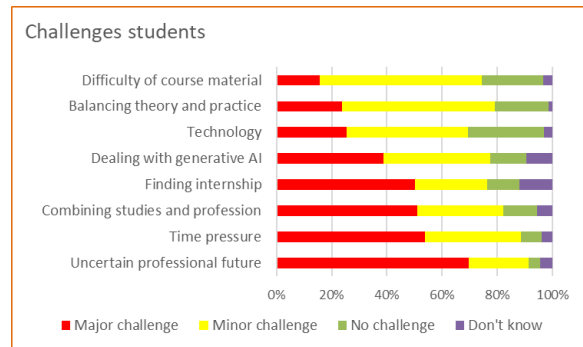


Figure 54 - Challenges - students

OPERATIONAL PRACTICES

Areas of business

Geographic origin

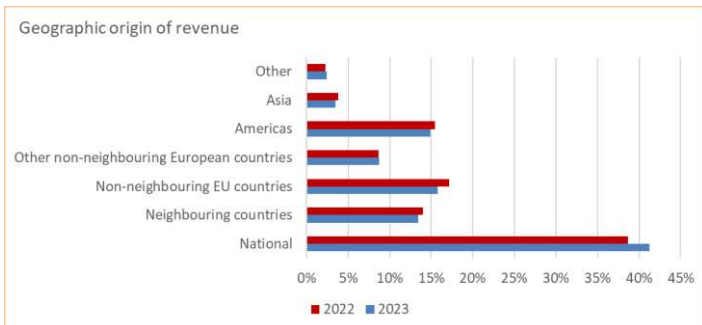


Figure 55 - Geographic origin of revenue - language companies

Language companies do not report major changes in the geographic origin of their 2023 business.

Domestic business continues to dominate the geographic mix and scores even slightly higher than last year.

Direct clients vs subcontracting

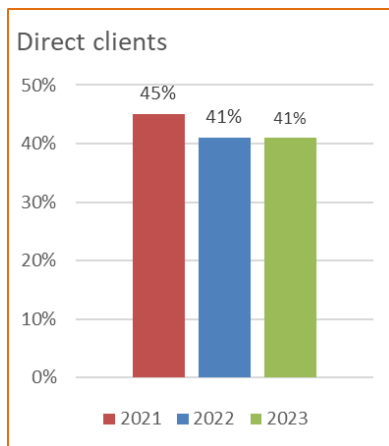


Figure 56 - Direct client ratio - independent professionals

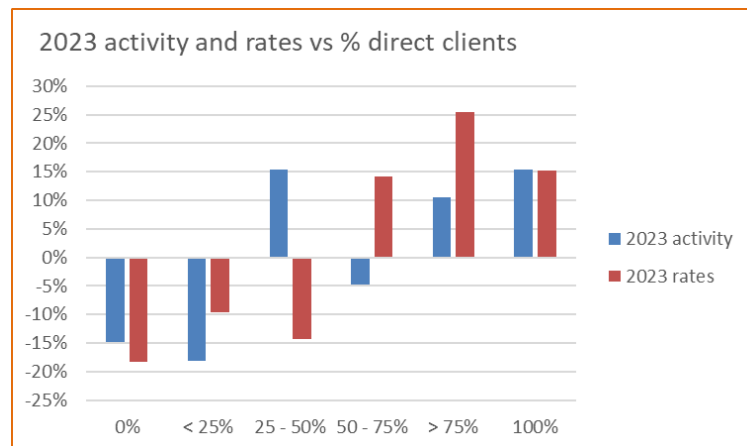


Figure 57 - Direct client ratio impact on performance – independent professionals

Independent language professionals report the same 41% direct client ratio as in their 2022 activity, after the substantial drop from the 45% reported a year earlier. That means that the increase expected for 2023 did not occur.

This year's data show a direct impact between the language professional's direct client ratio and their activity and rate levels. Professionals with more business from direct clients reported a better chance of increasing activity and rates. For those with lower direct client ratios, the results show opposite effects.

Language companies report a similar correlation, although the link between low direct client ratio and negative performance is not as clear as for the independent professionals, except for those who report a strong decrease of performance. The link between high direct client ratio and positive performance however cannot be overlooked, especially in terms of profitability.

Despite this relationship, language companies seem a bit reluctant to abandon subcontracting work, contrary to independent professionals who clearly intend to pursue a higher direct client ratio in 2024.

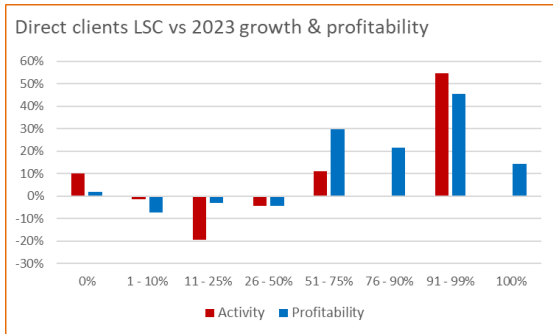


Figure 58 - Direct client ratio impact on performance – language companies

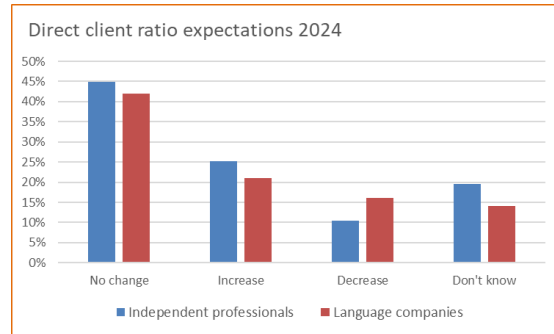


Figure 59 - Direct client ratio expectations

Services

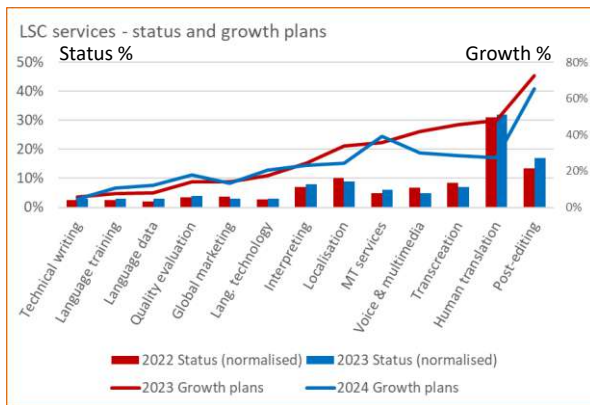


Figure 60 - LSC services status and growth plans

Normalising the total of all services to 100%, post-editing grew by 4%. Surprisingly, this does not lead to a corresponding drop in classic human translation, which also increased by 1% compared to other services and therefore remained by far the dominant type of service in 2023.

The estimated growth plans for classic human translation however dropped substantially from 48% to 27%, while those plans for post-editing remained very strong at 65%.

Besides classic human translation, growth plans also dropped substantially for localisation, voice and transcreation services. MT services is the only activity for which language companies plan to increase their growth plans compared to 2023.

In the Services chart above the status figures are normalised to a total of 100%, while the growth figures show the non-normalised respondents' intentions (totalling more than 100%).

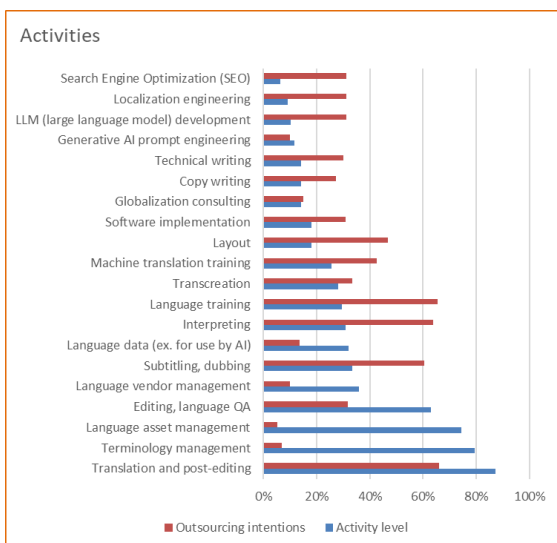


Figure 61 - Activities - language departments

Language department activities continue to be focused on translation/post-editing, quality control, language asset management (translation memories) and terminology management. Other more specialised activities are handled by less than 40% of the participating language departments.

Outsourcing behaviour has not changed, with direct language tasks outsourced to a large degree, but control kept internal, including language asset and terminology management.

The data indicate an interest in outsourcing activities that are not directly linked to managing classic language tasks, including MT- and AI-related activities, possibly due to a lack of internal specialists.

Client domains

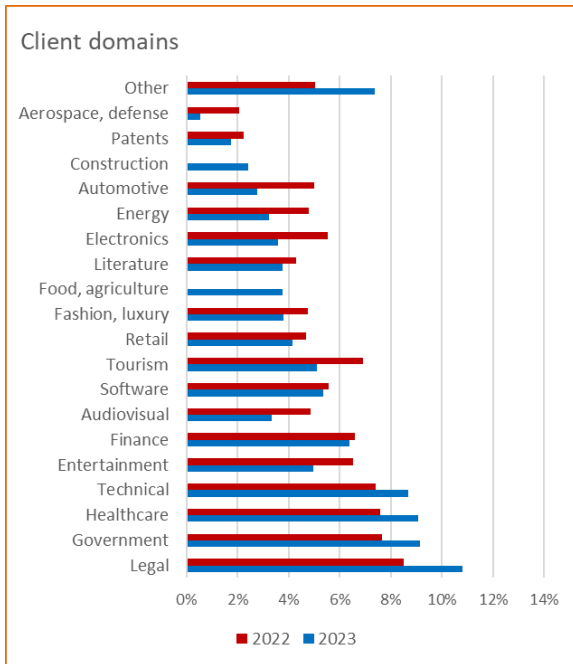


Figure 62 - Domain ranking - language professionals

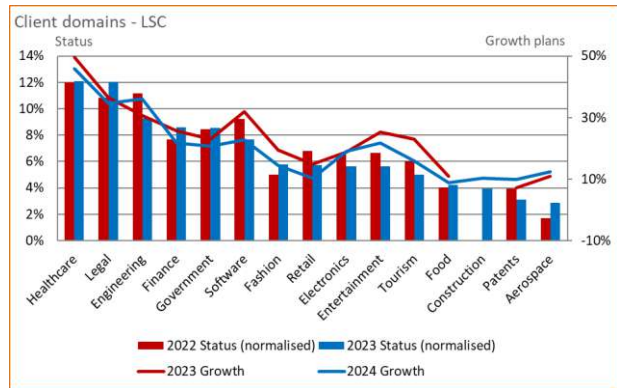


Figure 63 - Domain ranking - language companies

LSCs report only modest changes in domain distribution. Software seems to have suffered the strongest drop. The drop in activities such as engineering and electronics is at least partly linked to the introduction of the construction domain. Growth plans follow the domain status ranking, indicating that language companies do not intend to change their market strategy.

Independent professionals report similar changes as language companies, with a slightly stronger role for the legal domain, which confirms its #1 position. The Other category includes topics such as education and art, which will be included in the next edition. The drop in audiovisual work reflects the 2023 strike in Hollywood.

Operational changes

Independent language professionals

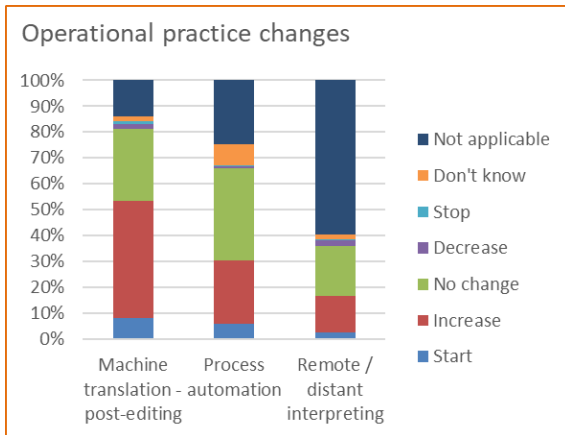


Figure 64 - Professional practices - language professionals

2024 will be known as the year that a majority (though small) of independent language professionals implicitly indicated that they are stepping up their use of machine translation or are starting to use it.

Combined with the answers about actual use of MT, we can now safely state that machine translation has become a standard part of professional translation work.

Despite several professionals spotting a return to in-person events, the use of remote interpreting shows only a further increase.

Language service companies

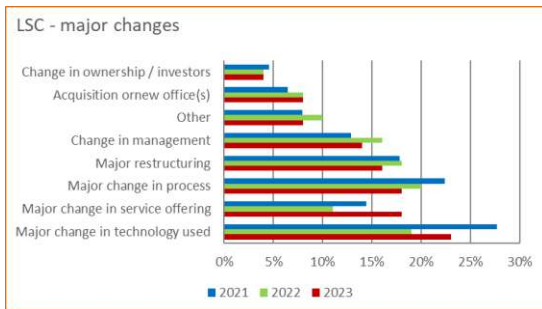


Figure 65 - Language company major changes

Gross margin, revenue and client satisfaction are clearly leading the ranking of performance indicators that are regularly monitored by language companies.

The much lower ranking of vendor relations and marketing performance may be somewhat surprising in an outsourcing-based industry with declining activity levels.

While structural changes (ownership, management) remain largely at the same level as the previous year, the 2024 data do see a major increase in service offering and technology changes.

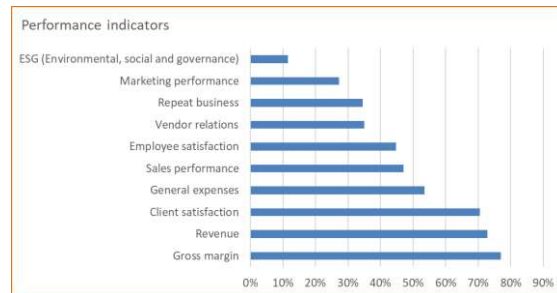


Figure 66 - Performance indicators - language companies

Language departments

For language departments, focus is strongly linked to organisation type, with private companies scoring consistently highest in all but one category, but especially for Growth.

The scores are lower than in 2023, which is due to the new highest score option 'Main focus'. The new category 'Product or service quality' is one of the main focus areas.

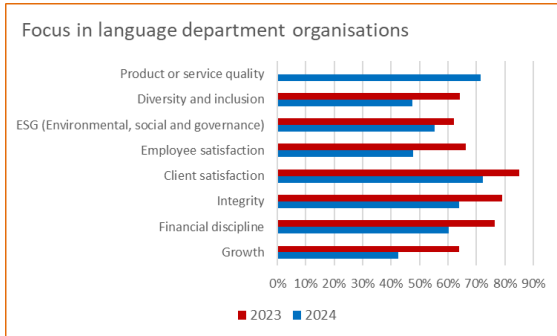


Figure 67 – Organisation focus - language departments



Figure 68 - Organisation focus vs organisation type

Outsourcing practices

Due to the wide variety of resources required, often for very small work volumes (think of long-tail languages), outsourcing has always been the main business model for the language industry.

Identifying the changes in outsourcing behaviour of end clients or between language service providers is therefore important to understand how the industry is evolving.

Language departments

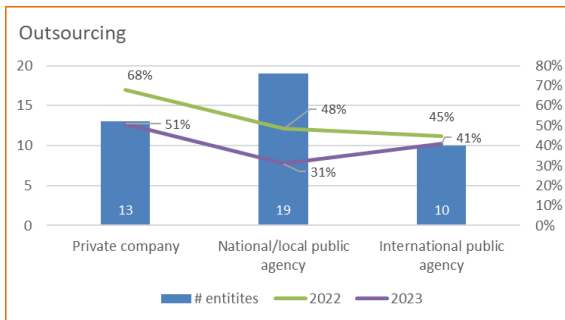


Figure 69 - Outsourcing levels - language departments

After an increase last year, all language departments report lower outsourcing levels than in 2022. The difference with 2022 is much stronger among national/local public agencies and private enterprises than in international public agencies.

This may be linked to the use of multi-year contracts with pre-determined volumes that are often used by the international agencies.

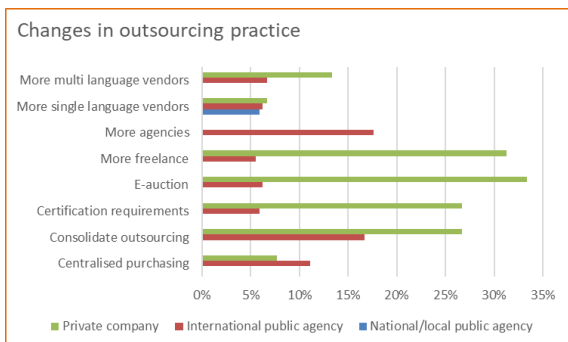


Figure 70 - Changes in outsourcing practice - language departments

National or local public agencies clearly do not plan to change their outsourcing practices.

Despite the small number of answers to this question, international agencies show some tendency toward consolidation of their outsourcing, including the use of more agencies.

The outsourcing intentions of private enterprises are completely unclear due to the small number of answers and the fact that several answers include contradictory choices (e.g. an increase of consolidation and an increased use of agencies, but also an increased use of freelance resources).

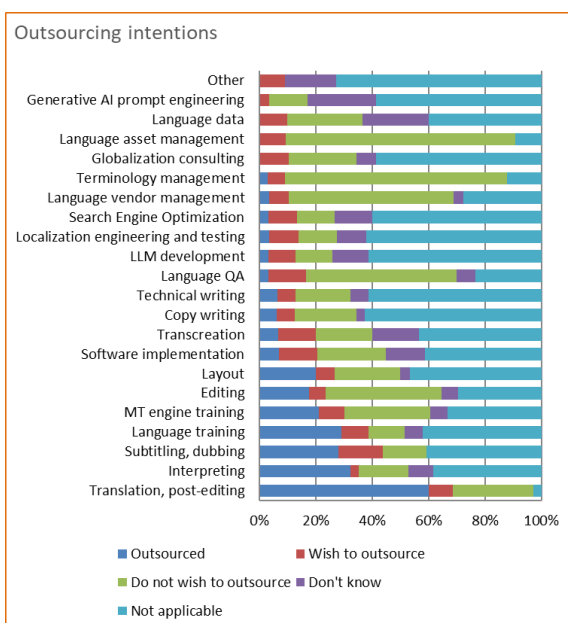


Figure 71 - Outsourcing intentions - language departments

The lower level of outsourcing is also visible in the list of individual outsourced services, but the outsourcing intentions for these individual services has not changed.

Some activities that language departments already kept largely in-house such as terminology or language asset management have virtually completely disappeared from the Outsourced category.

Some 20% of language department participants, most of them national/local public agencies, indicate that they do not wish to outsource their translation or post-editing activities.

Language service companies

Language companies report a small decrease in outsourcing compared to 2022 (59% vs 62%).

75% of the work is outsourced to independent professionals, which is slightly higher than in 2022 (71%).

61% outsource more than half of their work.

Only 5% operate a 100% in-house model, compared to 7% last year.

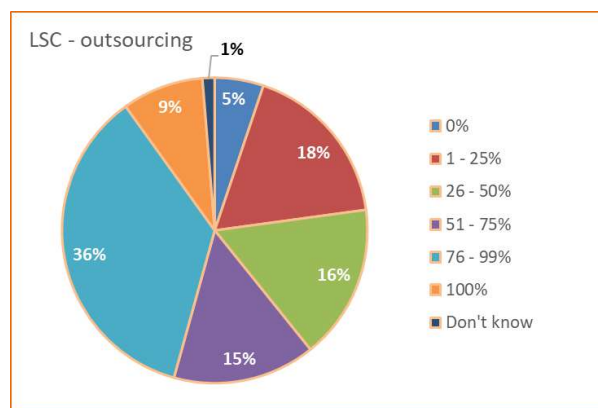


Figure 72 - Language company outsourcing practice

Client relationships

Just like last year, only the survey for independent language professionals addressed the importance of individual aspects of the relationship with direct clients.

This year, participants were asked to rank the various aspects, which leads to strong differences between the individual aspects and with regards to previous years.

A comparison between absolute levels of the different years is therefore irrelevant. Only the respective ranking is important.

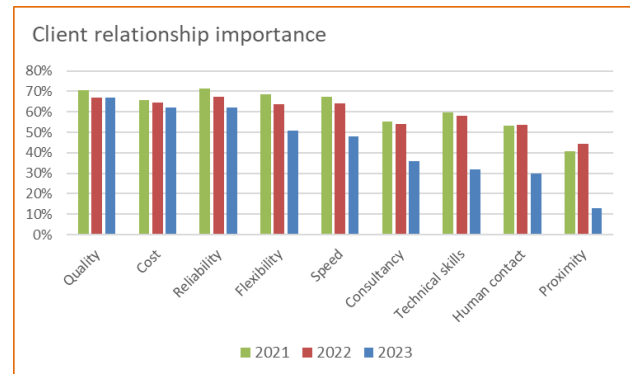


Figure 73 - Independent professionals' relationship with direct clients

According to independent professionals, quality, cost and reliability make up the top 3 of most important aspects of a client relationship. According to them, these three are considerably more important than the runners-up flexibility and speed.

Relations between independent language professionals and language companies



Figure 74 - Collaboration with language companies

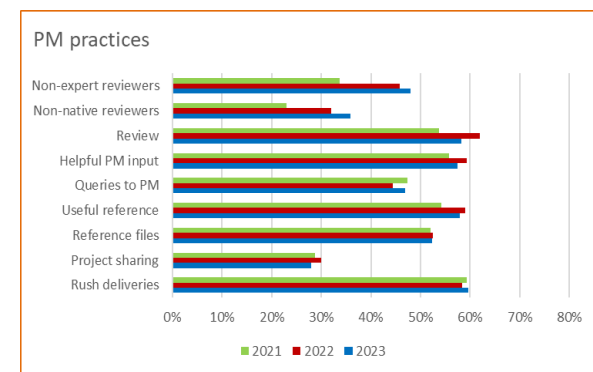


Figure 75 - Aspects of project management

Independent professionals give slightly lower satisfaction scores for the various aspects of their relationship with language companies than in previous years. Opinions about PM practices do not show major changes except a small further increase in non-native or non-specialist review.

Given that language professionals often mentioned that rate negotiations with language companies were difficult, an even lower score for flexibility was expected.

DEALING WITH TECHNOLOGY

Technology implementation

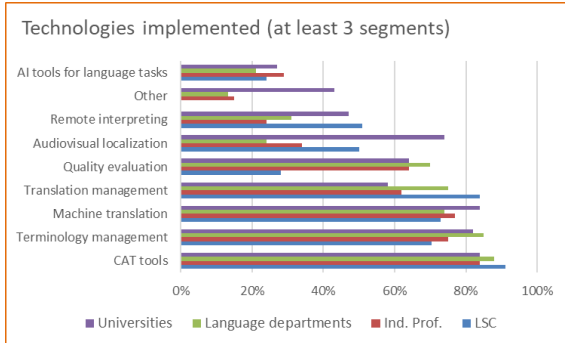


Figure 76 - Technology implementation

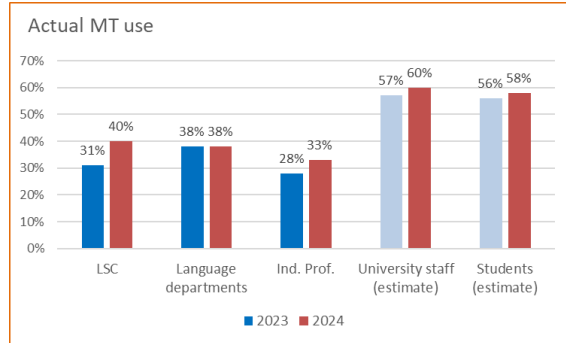


Figure 77 - Actual MT use

The 2024 data show a steady growth of technology implementation and use, although not for all segments and technology types. The evolution in each segment is detailed in the charts below.

University staff and students

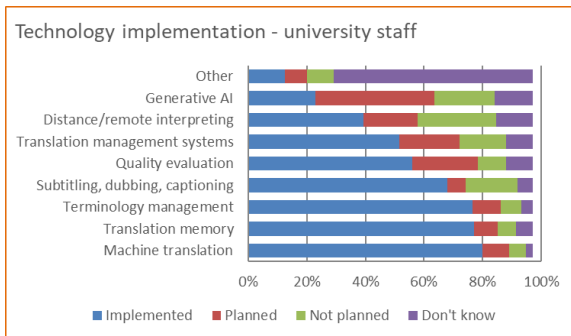


Figure 78 - Technology implementation – university staff

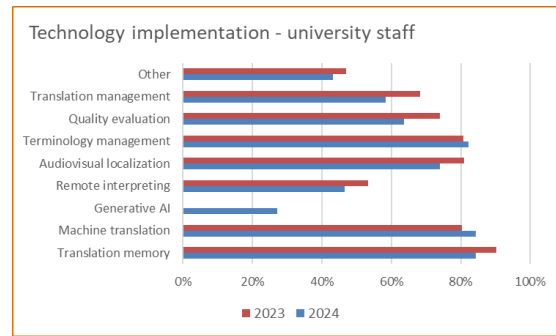


Figure 79 - Technology implementation - university staff - evolution

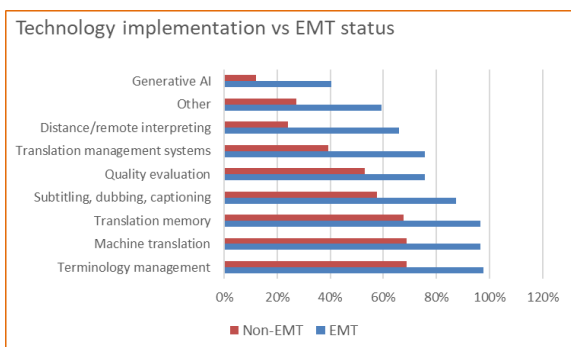


Figure 80 - Technology implementation vs EMT status

Overall university staff data do not show an increase in technology implementation.

This may be linked to a higher number of participants from non-EMT institutions, where technology implementation levels seem to be significantly lower than in universities that are members of the EMT network.

A direct comparison with 2023 is not possible since EMT membership was not a parameter in the 2023 survey.

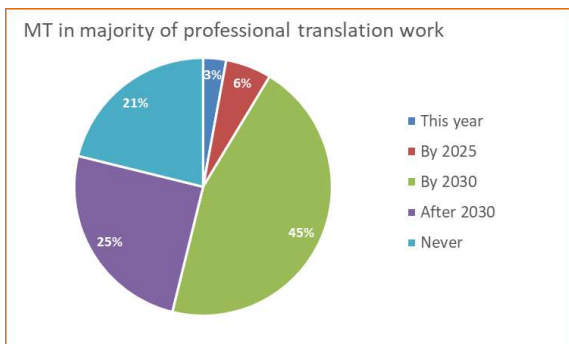


Figure 81 - MT in majority of professional translation work

University staff state that training and support from technology providers is a much smaller concern than in 2023.

This may be thanks to better support or be linked to the better score for ease of use.

A small majority of students estimate that by 2030 machine translation will be used in a majority of professional translation work. 49% think that it will take longer (or will never happen).

At the same time, however, they also estimated that the average MT use currently reaches 58%. It is not possible to confirm that this estimate included only professional work.

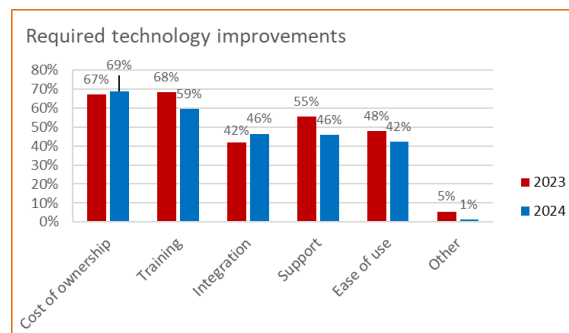


Figure 82 - Required technology improvements – university staff

Independent language professionals

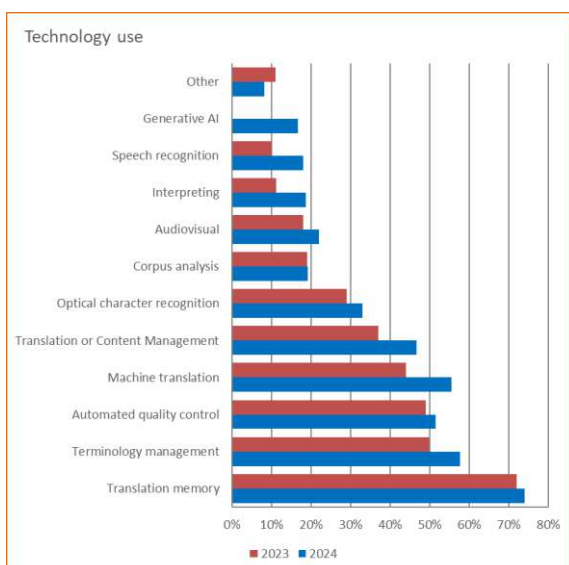


Figure 83 - Technology use - independent professionals

The comparison between 2023 and 2024 is somewhat influenced by a difference in answer options, which required a re-assessment of the 2023 averages.

Despite this change, the data show a significant increase in actual usage of machine translation and translation or content management, with machine translation usage (55%) scoring significantly higher than in the language company and language department segments. The same applies to generative AI which makes a solid entry with an average 17% usage.

Other technologies used include OCR and corpus analysis tools, among others.

Not surprisingly, artificial intelligence leads the ranking in first time use and investment plans.

28% used AI for the first time in 2023 and 21% of independent professionals intend to invest in the technology in 2024.

Other investment targets include machine translation and audiovisual tools, plus already mature technology such as terminology management and translation memory (which were not included in the technology list in ELIS 2023).

Quality control technology seems to be advancing as well, with 10% intending to invest in it (although the stronger 14% investment plans expressed in ELIS 2023 do not seem to have been carried out completely).

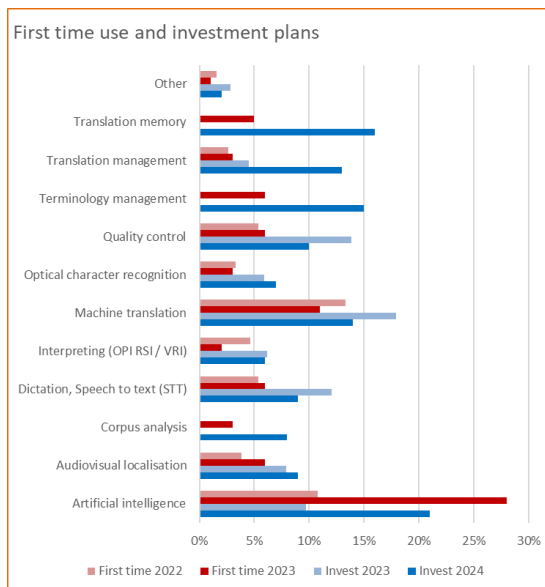


Figure 84 - First time technology use and investment plans - independent professionals

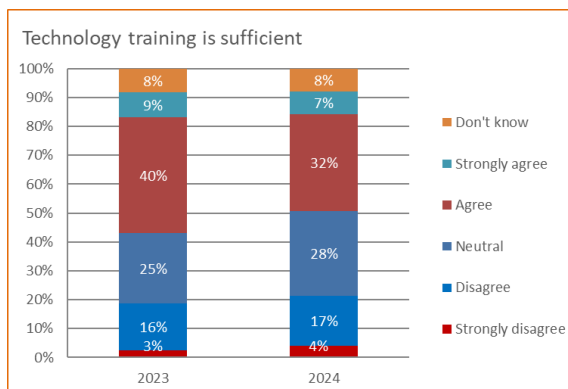


Figure 85 - Technology training satisfaction

Participating independent professionals indicate that they are less satisfied with technology training provided by tool manufacturers than last year.

Only 39% were satisfied, which is a 10% drop compared to the 49% of 2023.

21% express their dissatisfaction vs 19% in 2023.

Language departments

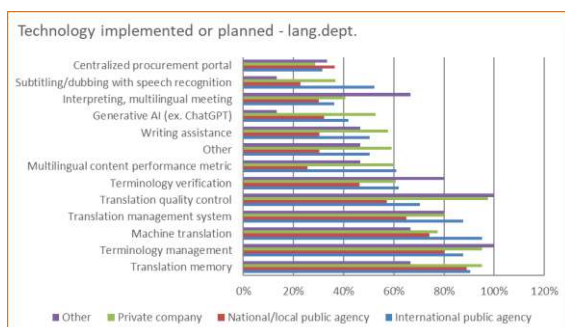


Figure 86 - Technology implementation - language departments

As can be expected, technology implementation depends largely on the type of organisation and its activities.

National or local public agencies continue to score lower than their international colleagues and private enterprises, but are catching up, especially in the mainstream technologies.

The difference between organisation types is particularly visible in the actual use of machine translation.

National agencies are using the technology significantly less than their international colleagues, and especially in the work that they outsource, with only 20% of outsourced work using MT compared to 40% in international agencies.

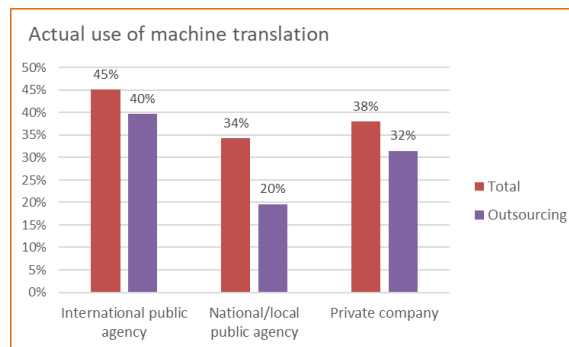


Figure 87 - Actual use of MT - language departments

Language companies

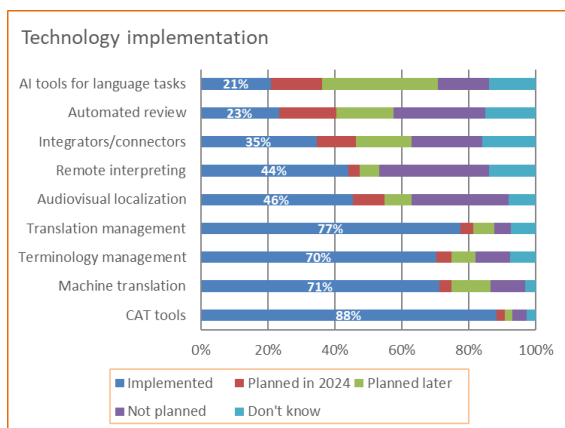


Figure 88 – Technology implementation - language companies

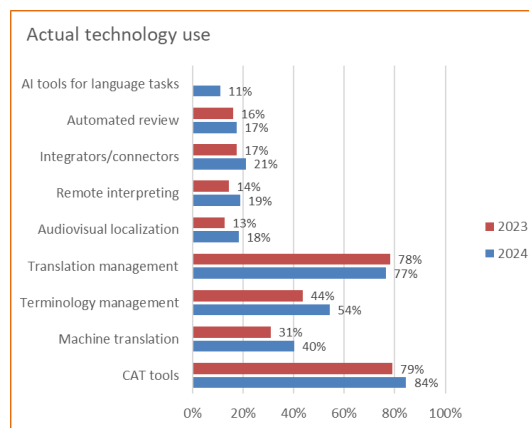


Figure 89 – Actual technology use - language companies

More than 70% of the language company participants report that the mainstream language industry technologies are implemented in their companies.

It is interesting to note that AI tools will reach that same level if all planned implementations are carried out. Only 15% indicate that they do not intend to implement this technology.

When looking at the actual use, CAT tools and translation management systems are clearly in the lead, with little room for further increase.

Machine translation and terminology management are strongly growing.

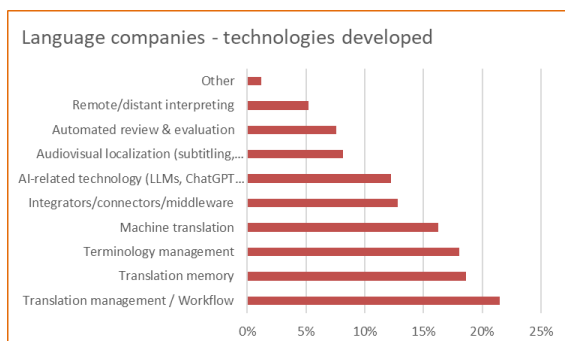


Figure 90 - Technologies developed - language companies

Quite a few language companies report that they are developing their own technologies, either for internal use only (12%) or also to be sold to external clients (17%).

The survey does not show any tendency for language companies to venture more into tool development. The number of companies that are not developing tools has increased from 64% to 71%.

Note that the 19% of participants that report developing translation memory tools does not correspond with the 8% that selected 'Proprietary' as an answer to the question about specific CAT tools used (see below).

Preferred tools

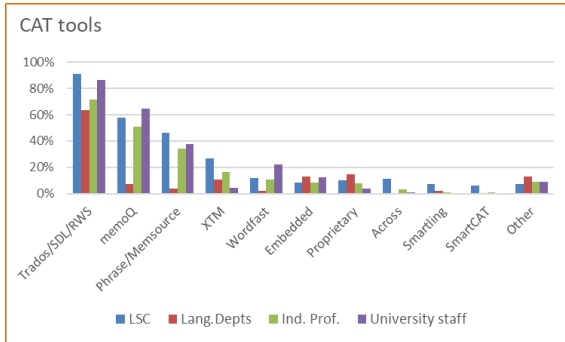


Figure 91 - Preferred tools – translation memory

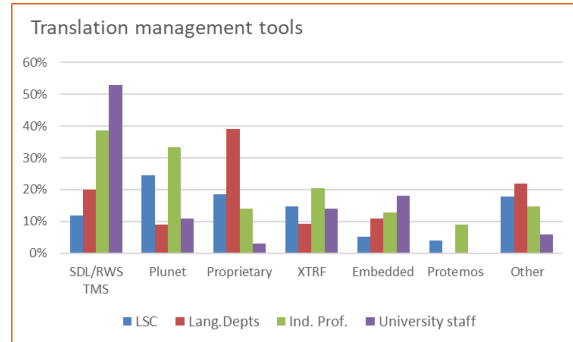


Figure 92 - Preferred tools - translation management

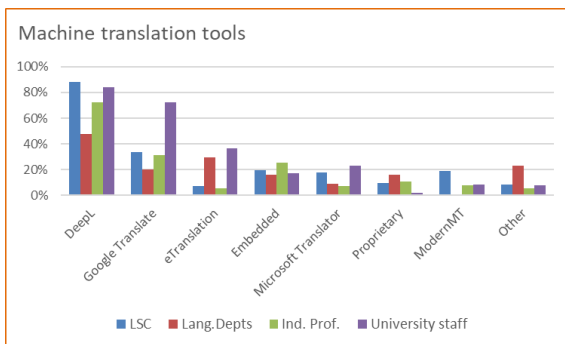


Figure 93 - Preferred tools – machine translation

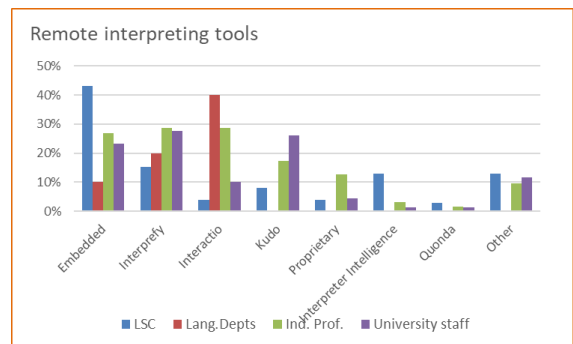


Figure 94 - Preferred tool - remote interpreting

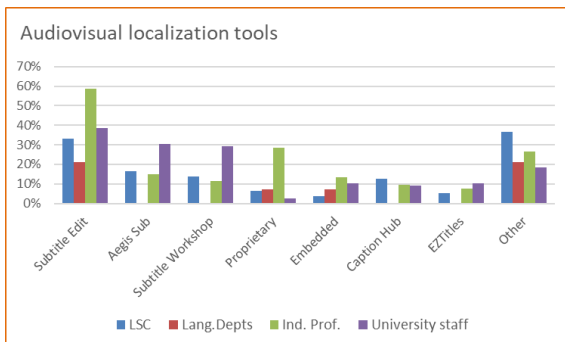


Figure 95 - Preferred tools - audiovisual localization

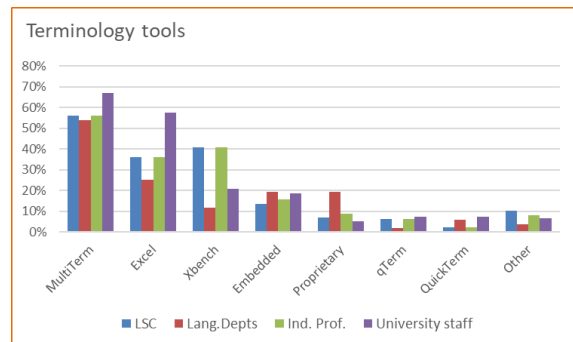


Figure 96 - Preferred tools- terminology management

The above lists show the tools that are mentioned more than once by the various segments.

Overall, the usual suspects tend to confirm their reputation as market leaders, but it is obvious that different segments make different choices. This is often due to budgetary reasons (especially for universities) or due to data security requirements (language departments).

In the ELIS 2023 report we wrote “With the integration of technologies into suites that combine most if not all required functionalities, it may soon be futile to look at individual tools.”

Today’s results do not indicate that this statement will become true any time soon, although the integration of AI tools may give platforms an additional advantage. More precise wording in future editions may be required to clearly distinguish between standalone and embedded functionality.

AI – The elephant in the room

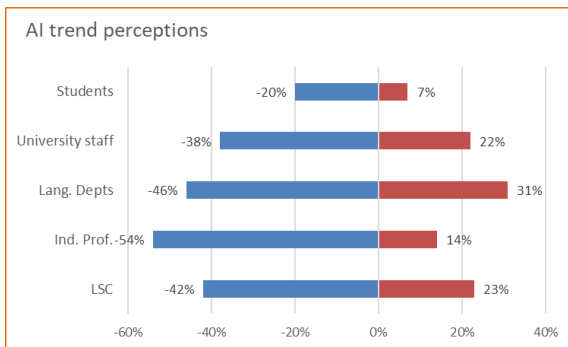


Figure 97 - AI trend perceptions

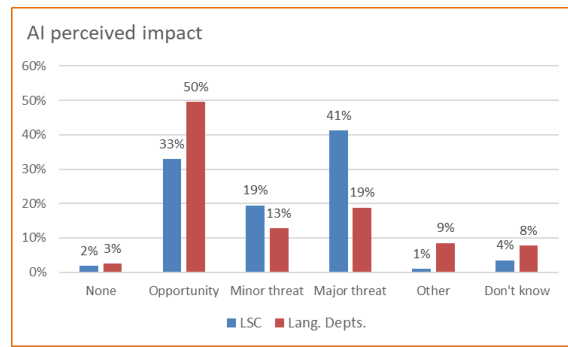


Figure 98 - AI perceived impact

Artificial Intelligence generates the same reactions that machine translation did a few years ago. Even the scores and the comments in the trend section are extremely similar.

Those who see the positive side, think of it as a tool to increase efficiency, as a source of additional editing work or even as a motivator for clients to choose human translation due to bad AI experiences.

The negative opinions, which are coming from the majority of participants in all segments, are fuelled by a number of fears. There is the risk of indiscriminate use of the technology by those who have not been trained to use it correctly, which is likely to lead to quality issues.

More generically however, participants, and in particular the independent professionals, express the fear that widespread acceptance of AI by the general public will increase acceptance of machine translation – with or without post-editing - as a valid replacement for human translation. In that sense, AI and MT are considered to be equivalent in the sense that both reduce the appreciation, and therefore also the financial compensation, for human language work.

While the actual use of AI is currently very limited – around the 10% mark – the development of machine translation has shown that this can change dramatically in only a few years time.

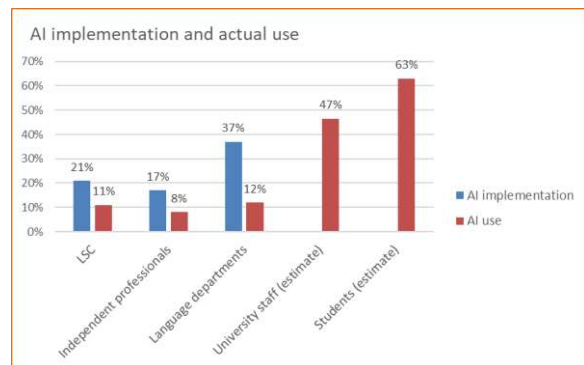


Figure 99 - AI implementation and actual use

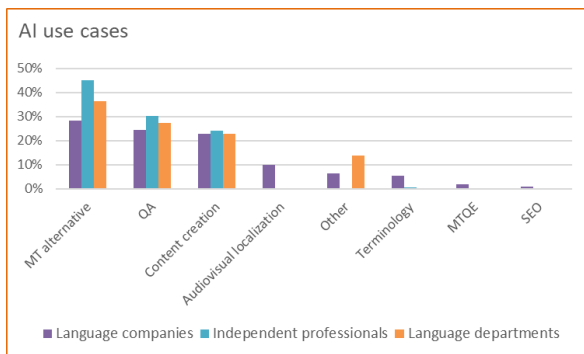


Figure 100 - AI use cases

Participants indicate that they are currently using AI primarily as a convenient alternative for dedicated machine translation.

Depending on MT engine, language pair and language model, generative AI's translation quality is claimed to be at par or only slightly below premium MT quality.

For those that see AI as an opportunity, its potential to automate quality control and evaluation is a prime target.

With tools like ChatGPT already widespread among the general public, it is not surprising that content creation is a solid third in the current ranking of AI use cases. Other applications mentioned include audiovisual localization, terminology extraction and factual research, as well as quality evaluation of machine translation and search engine optimisation.

ChatGPT and its industrial brother GPT-4 are by far the most popular AI tools in all segments.

The pre-defined survey list of AI tools was very limited. Participants therefore also mentioned other tools, such as Claude, Llama2 and Perplexity, as well as the AI technology embedded in technology platforms such as AWS Bedrock.

Since AI tools are shooting up like mushrooms, this landscape may look very different in 2025.

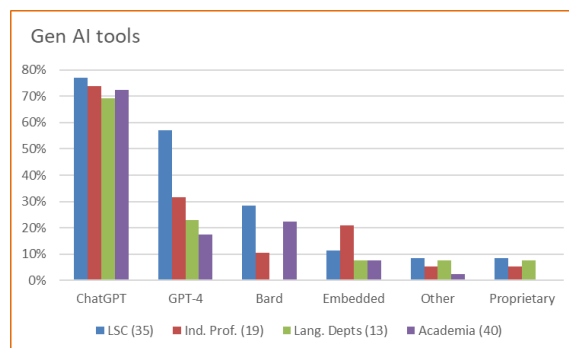


Figure 101 - Preferred tools - Generative AI

AI in translation education

Generative AI is probably the only language technology that is more widely used in translation training programmes than in the language industry itself.

63% of students confirm that Gen AI is part of their training, which does not mean that it is not a challenge.

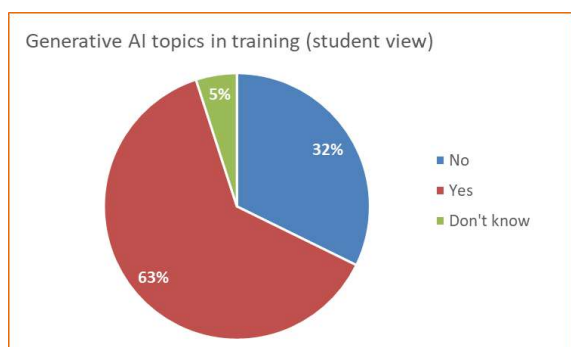


Figure 102 - Gen AI in translation training

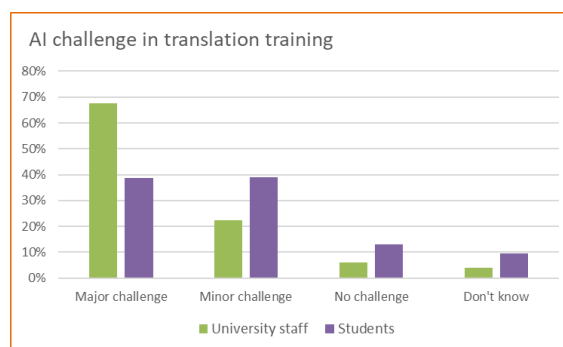


Figure 103 - Gen AI challenge in translation training

One of the main challenges that universities encounter is to determine rules for the use of AI in their programmes. With 43% of staff participants indicating that they already have created such rules, but another 43% stating the opposite, this is still largely work in progress. It is also clear that some countries are already more advanced than others in this matter.

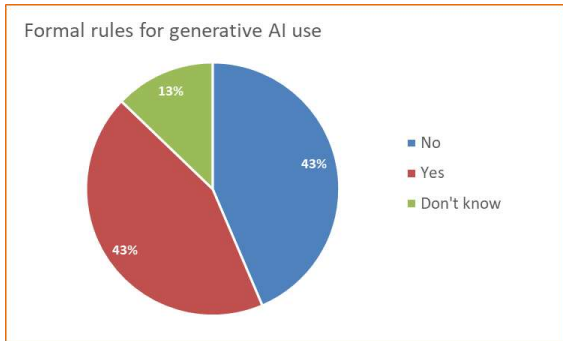


Figure 104 - Formal rules for Gen AI use

University participants confirm that they do participate in AI-related initiatives in the framework of the ELC SIG, CLARIN ERIC campaigns or Erasmus+.

The data show a strong difference in approach between institutions that are part of the EMT network and those that are not.

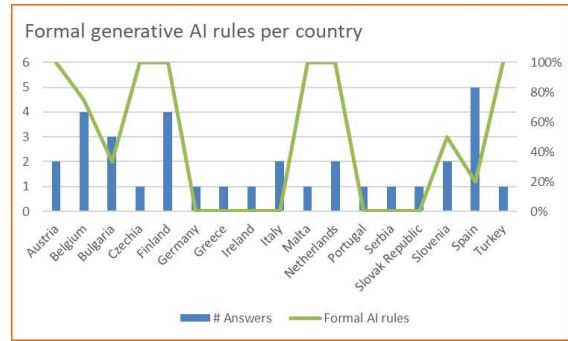


Figure 105 - Formal rules for Gen AI use per country

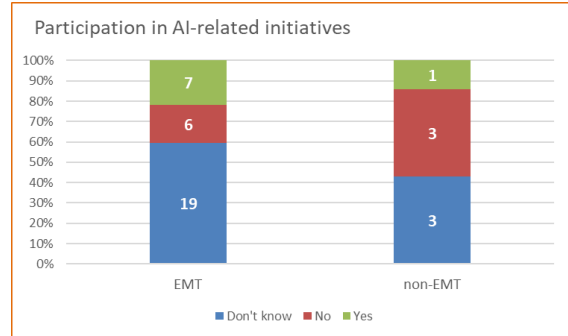


Figure 106 - University participation in AI initiatives

WORKING IN THE LANGUAGE INDUSTRY

A global market of more than 25 billion euro (according to Slator.com’s estimate) or even 60 billion (according to Nimdzi) is, by definition, a valuable source of employment.

Due to the very nature of the service and the prevailing freelance-based business model, the language industry is a sector that newcomers can easily enter without too many capital- or technology-related restrictions.

Net 20% of the independent participants still expect the number of professionals in their market to increase, but participating language companies disagree, with an equal percentage expecting that the number of language companies in their area will decrease.

Language company staffing

Although the language market is primarily based on outsourcing and freelance professionals, with a median value of 18 staff members for the participating companies, one should not underestimate the employment potential of this industry segment.

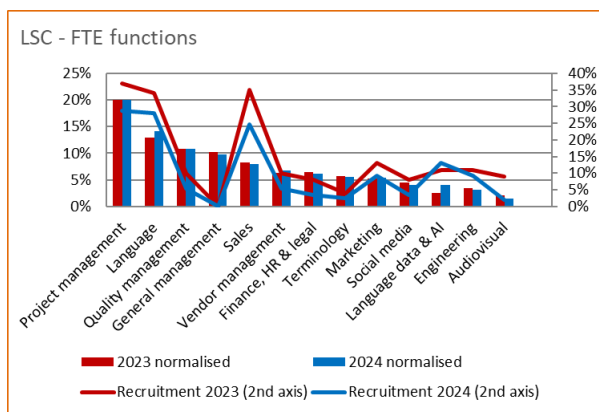


Figure 107 – LSC staffing and recruitment

The function distribution has not changed in 2023, with some 55% of language company staff (expressed in full time equivalents) directly involved in production, in a project management role, as linguists, multimedia experts or engineers.

Participating companies have significantly toned down their recruitment plans in production areas such as project management and language, but also in sales (where the ambitious 2023 recruitment intentions do not reflect in the current staffing levels).

Audiovisual has completely disappeared from the recruitment plans. The only area where companies have (slightly) more ambitious plans than in 2023 is, not surprisingly, AI and language data.



Figure 108 - Dedicated managers – language companies

This year’s results suggest a drastic reduction of the number of dedicated managers.

Areas that were hit particularly hard include marketing (-15%), language management (-13%) and finance (-10%).

These lower figures are surprising, since language companies reported lower levels of

restructuring and changes of management (see

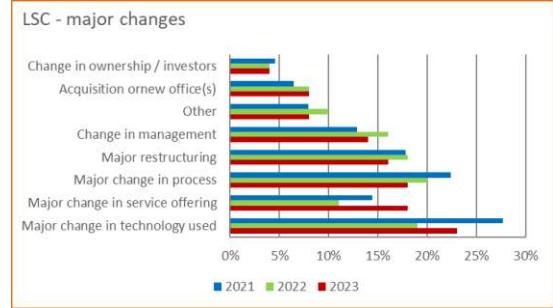


Figure 65 - Language company major changes).

Employment quality

Work from home

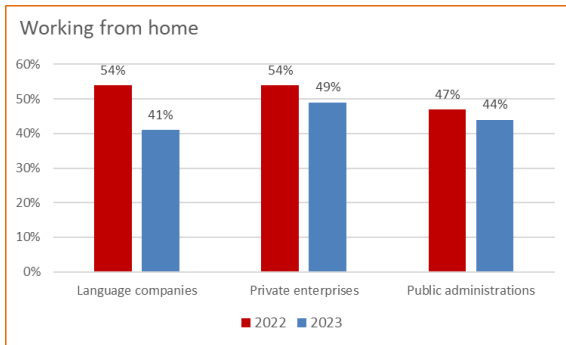


Figure 109 - Work from home

The return to office tendency that we already witnessed in the private enterprise 2022 data has now also made its entry in the language company segment.

In 2023, LSC staff worked on average 41% of the time from home, compared to 54% the year before.

The language departments also report a lower average of working from home, although the drop is not as drastic. Also note that the public administrations reported an increase in remote working in ELIS 2023.

There are no signs that the levels of hybrid working will drop significantly in the future.

Work-life balance

Participants in all segments, except university staff, report the same or a better work-life balance than in the previous year.

The free text comments from independent professionals that work-life balance is being impacted further by AI and MT cannot be confirmed by their – admittedly low – work-life balance score.

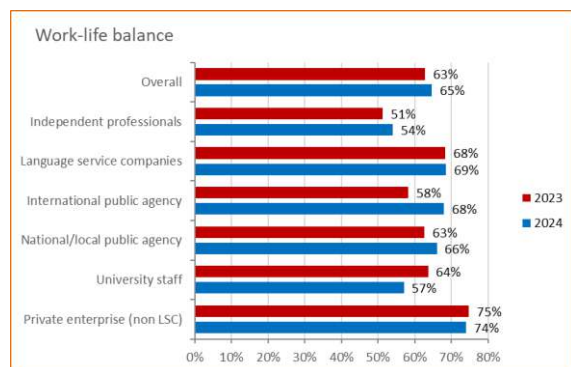


Figure 110 - Work-life balance

Career satisfaction

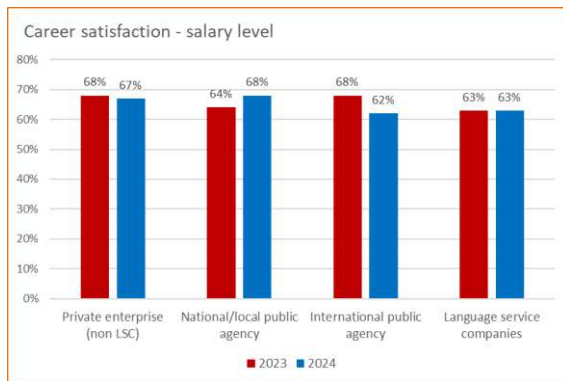


Figure 111 - Career satisfaction – salary levels

Participants from different employer-type segments report career satisfaction levels that are comparable to those in 2023, with some minor exceptions such as a 6% drop in salary satisfaction among participants from international public agencies.

The data do not show major differences in gender, company size or company type.

Overall, the scores reflect the opinion that the language industry is a reasonably good industry to be a part of.

This also reflects in an even higher *stickiness* score expressed by (non-owner) employees of language companies.

More than 80% of them indicate that they plan to stay in the same company and in the industry. Whether this further increase is linked to higher insecurity about the global economy could not be confirmed.

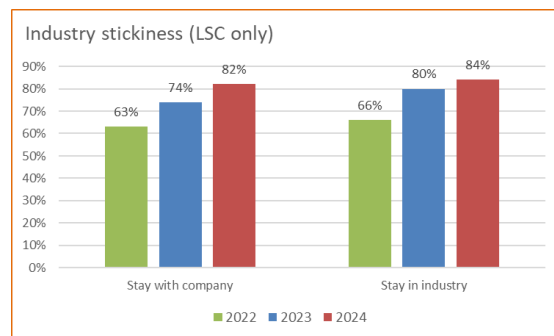


Figure 112 - Industry stickiness - language companies

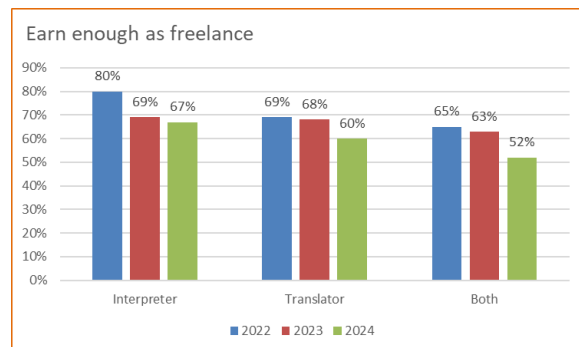


Figure 113 - Earnings independent professionals

This further decline explains the frustration that independent professionals express in their free text comments as well as the further drop in retirement provision and private insurance.

Insufficiently stable earnings continue to be named as the main reason for not being able to make such provisions.

Independent professional data unfortunately show a different picture.

Only 58% report that they earned enough with their freelance activity, which is a massive drop from the 66% in ELIS 2023 and 68% in 2022.

While the difference with 2023 data is not that obvious among interpreters, it is particularly clear among translators and those who combine both activities.

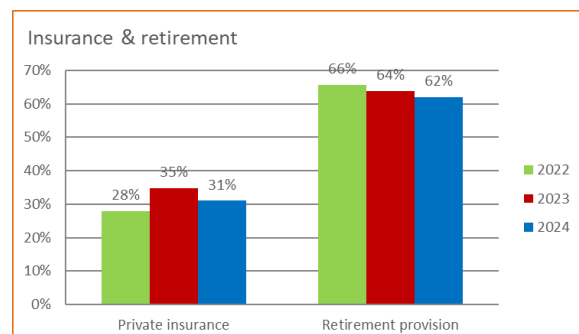


Figure 114 - Private insurance and retirement provisions – independent professionals

The gap in earnings satisfaction between female and male independent professionals that was reported in previous years, also appears in this year's results, but did not widen: 57% for women (65% in 2023) and 64% for men (73% in 2023).

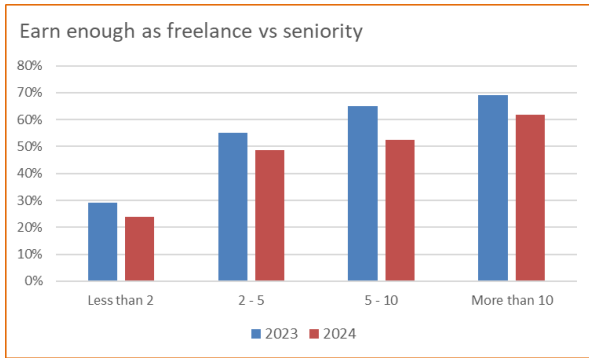


Figure 115 - Finances vs years of activity - independent professionals

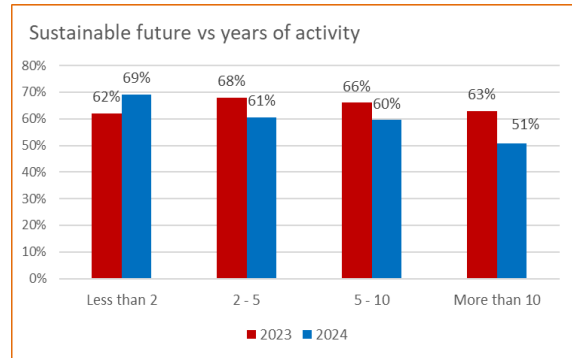


Figure 116 - Sustainable future vs seniority – independent professionals

The decline in earnings is evenly spread over all seniority classes.

Not surprisingly, junior professionals have the hardest time earning a living with only their freelance activity.

It is therefore surprising that they continue to show the highest level of optimism regarding the sustainability of a future as a freelance language professional (69%, which is even higher than in 2023, compared to only 51% among participants with more than 10 years activity which is substantially lower than in 2023). Note however that the most junior professionals represent only 3% of the independent professional participants.

Training and continuous professional development (CPD)

Training is an important part of all professional settings and all segments of the industry.

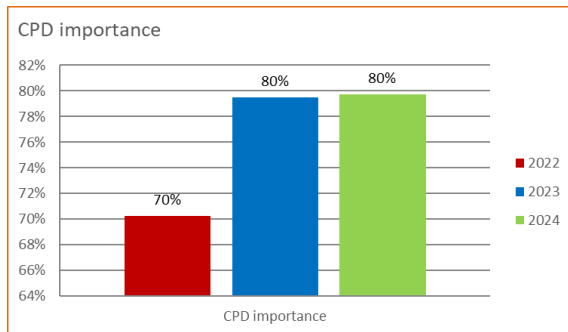


Figure 117 - CPD importance

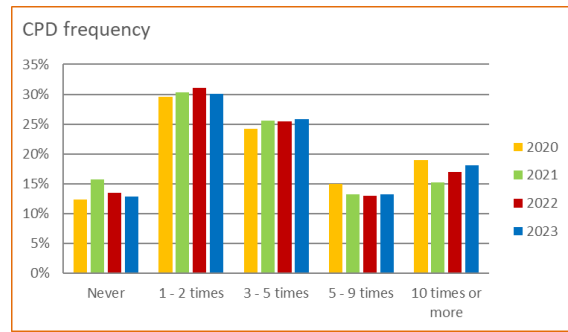


Figure 118 - CPD frequency

For many independent language professionals CPD (continuous professional development) is an integral part of their activity, often linked to a certification or the membership of their local professional association.

The high level of importance (80%) of 2023 is maintained this year, and the average number of CPD sessions increased.

Participants from language department show the same level of commitment to training, with 50% reporting more than 25 hours of training in 2023.

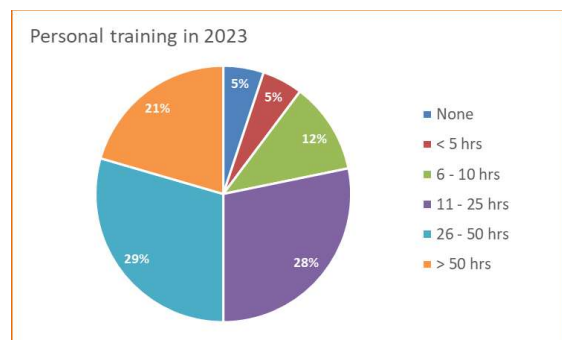


Figure 119 - Training frequency - language departments

As can be expected, reported training topics depend strongly on the industry segment.

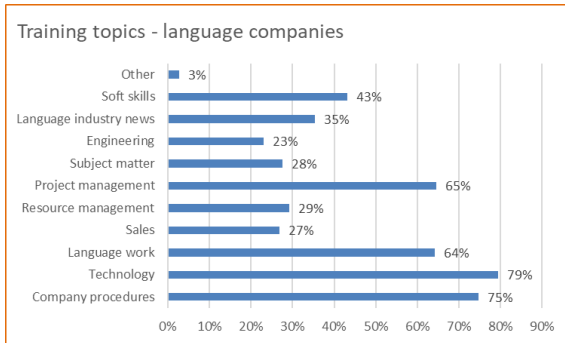


Figure 120 - Training topics - language companies

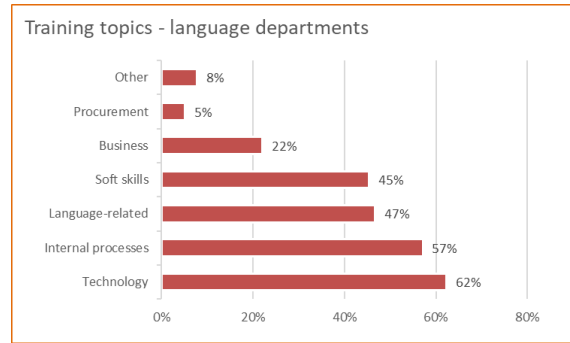


Figure 121 - Training topics - language departments

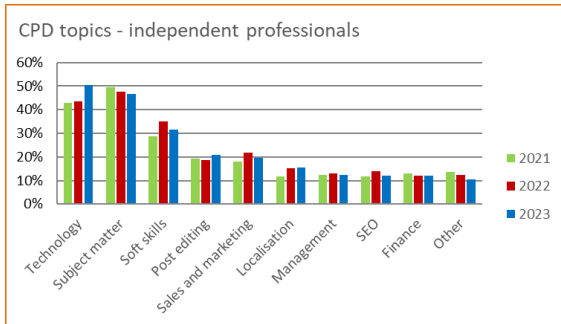


Figure 122 - CPD topics - independent professionals

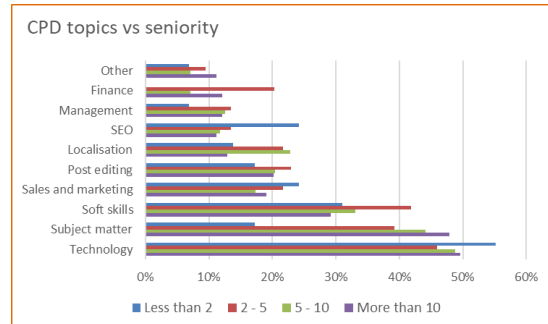


Figure 123 - CPD topics vs seniority

Technology is in all segments the main training topic. For independent professionals it replaces subject matter training as the leading topic.

Not surprisingly, organisation-specific processes and procedures come in second for both language companies and language departments.

Sales is only modestly represented, both in language companies and among independent professionals, despite disappointing activity levels.

The way that trainings are delivered is very different in language companies and language departments: on the job training is way more important for language companies than for language departments, and the opposite is true for group training. On-line webinars are visibly gaining popularity as a way to deliver training.

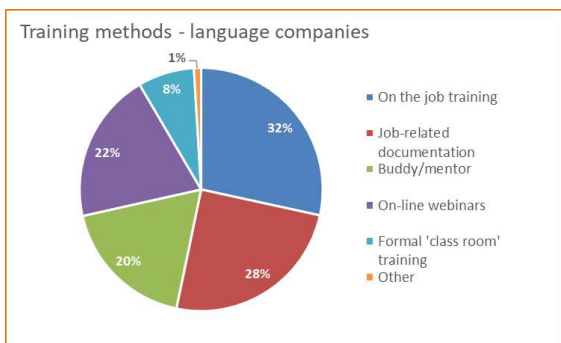


Figure 124 - Training methods - language companies

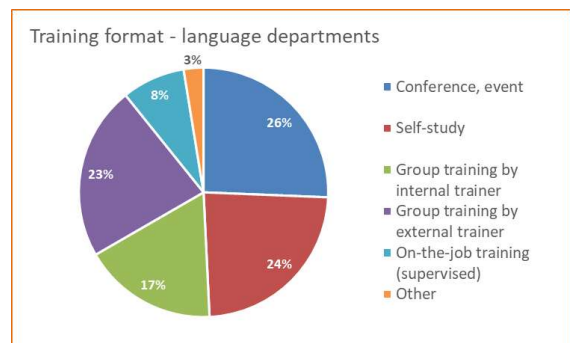


Figure 125 - Training methods - language departments

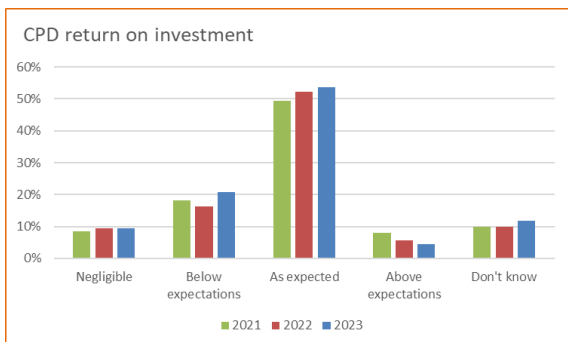


Figure 126 - CPD return on investment – independent professionals

The number of respondents considering the return negligible or below expectations has increased slightly, but overall independent professionals have not significantly changed their opinion about CPD return on investment.

Required skills



Figure 127 - Skill importance and performance

Aligning training programmes with the skills that are required by the market is the training institutes' main concern.

The gaps that ELIS identifies each year between expectations and performance prove that this is not an easy task.

This chart combines the view of university staff (both with regards to the perceived employer

expectations and the estimated performance of the master graduates) with statements from language company and language department participants about the skill gaps that they notice in master graduates that they hired in 2023. The main conclusion of this chart is that there is no common expectation pattern in the language industry.

What employers expect from new hires obviously depends on the position for which they hired the new recruit. For instance, translation competence and technology requirements are completely different for an editor and a project manager. But the structure of the company and its support capacity also play an important role. A small language company will require its new hires to come with a solid expertise in translation technology, because it typically does not have the support staff to provide that kind of training, unlike an international public agency.

This explains the extreme differences in gaps reported by different types of employers.

An interesting observation is that the gaps identified by language companies roughly look like a more extreme form of those expressed by university staff, which seems to indicate that the increasing co-operation between universities and language companies is creating a better mutual understanding.

One area that remains problematic is translation technology. Both language companies and language departments identify it as the area with the biggest skill gap, despite the very high level of technology implementation and usage in the training institutes. More detailed discussions between individual universities and employers seem necessary to identify which aspects of technology are not sufficiently covered.

LANGUAGE INDUSTRY TRAINING LANDSCAPE

Besides the issues with skill gaps, training institutes are struggling to cope with ever more stringent budget and regulatory restrictions and higher requirements for academic publications.

To make things worse, the widespread interest for AI among the general public has made a career choice in languages an even less evident choice.

This chapter updates the data that previous ELIS editions already gathered on the training landscape, in order to identify changes and gaps that need to be addressed.

Note: The data for this training landscape overview come only from the university staff, not from the student survey.

Existing training programmes

Programme foci

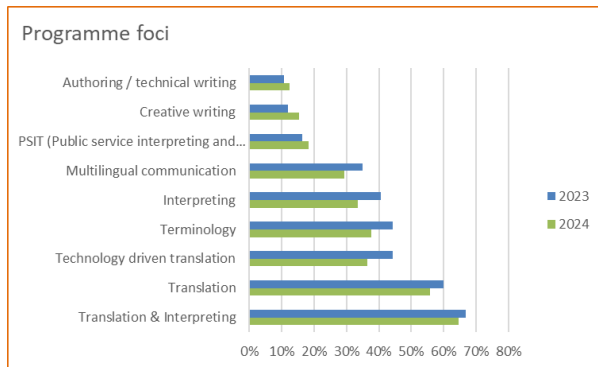


Figure 128 – Training programmes

Programme foci numbers are slightly below the 2023 numbers.

This is partly due to a lower number of institutes stating that they offer both a combined Translating & Interpreting programme and individual Translation and/or Interpreting programme.

The reason for the drop in technology driven translation (that saw an increase last year), terminology and multilingual communication is unclear. Some institutes may have decided to integrate these topics into their translation/interpreting programmes.

Programme levels are similar to those reported in 2023. Direct comparison is not entirely possible due to the missing "Professional non-EMT Master" and "Academic non-EMT Master".

For the next edition, the answer options need to be reviewed, since even the difference between Professional and Academic does not seem clear to all participants.

Specialisations

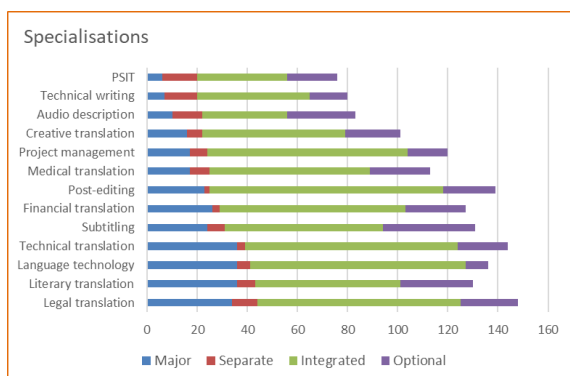


Figure 129 - Training programme specialisations

In a 'Major' specialisation, a significant part of the programme is focused on that particular domain, while 'Separate' means that domain-specific courses are part of the standard programme. 'Integrated' indicates that domain-specific content is used in the standard programme and 'Optional' means that students can add non-compulsory domain-specific courses to their programme. The chart is sorted by Major + Separate.

The ranking is based on a combination of Major and Separate and the total number of entries.

Legal and financial translation moved up considerably (from rank 5 to 1 and from 10 to 6 respectively) while technical translation and post-editing moved down several ranks. The latter does not mean that these specialisations are offered less often (the ratio of Major and Separate increased for virtually all specialisations), only that some other specialisations have increased more.

Languages

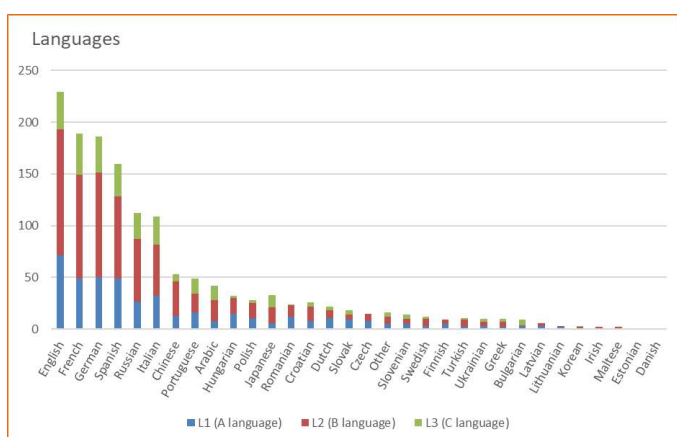


Figure 130 - Training programme languages

Language distribution cannot be considered a true reflection of the actual situation due to the imbalance in response numbers (for example no university staff responses from Denmark), but it allows us to see how (un)popular languages are in other countries.

The absence of entries for Danish means that none of the participating universities in other countries offer Danish as an L2 or L3 language, which makes Danish one of the vulnerable languages in Europe.

Figure 131 shows the number of countries in which participating universities include the languages in their training programmes, at each of the L1 (A language), L2 (B language) or L3 (C language) level.

The total number exceeds the number of countries. This is normal since many institutes offer specific languages at more than one level.

This gives a better view of the international interest in a specific language.

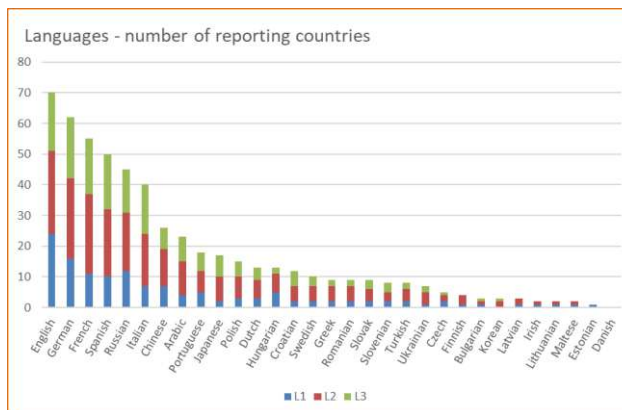


Figure 131 - Number of countries in which languages are taught

Preparing for the language industry

On top of the professionalisation courses that are part of the standard training programme, training institutes typically have 4 main instruments to prepare their students for the reality of the language industry: guest lectures, internships, workshops and simulation exercises.

All but one (simulated translation company) have increased compared to previous year, in particular guest lectures and internships. According to the participating university staff, the approach with regards to commercial assignments has not materially changed.

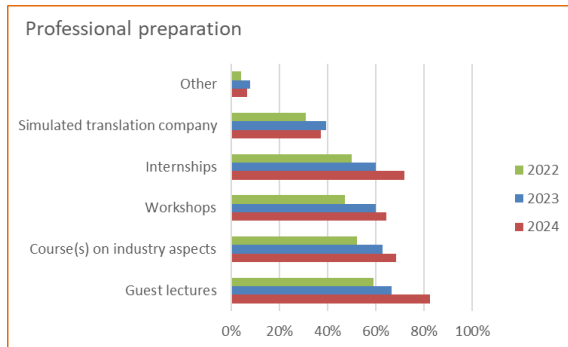


Figure 132 - Professional preparation in training programmes

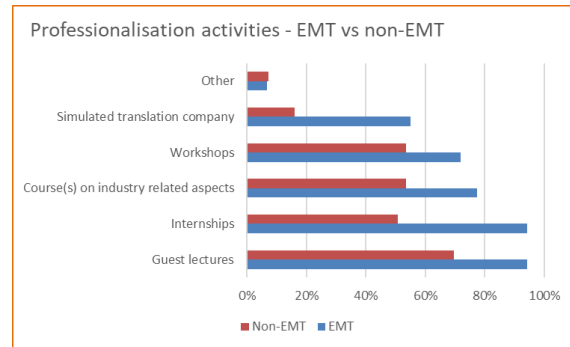


Figure 133 - Professional preparation - EMT vs non-EMT

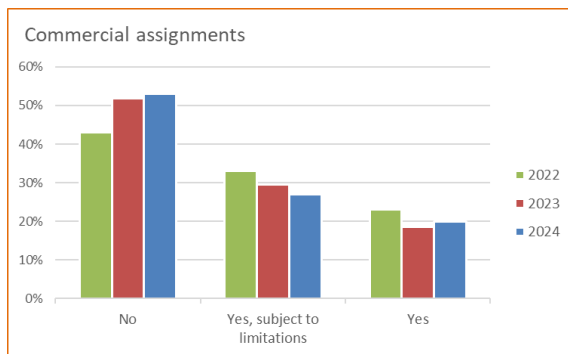


Figure 134 - Commercial assignments in simulations

After the fairly strong change last year, participants do not report any major shifts in their approach to commercial assignments as part of translation company simulations.

More than 50% of participants continue to report that their training institute does not accept commercial assignments as part of these simulations.

Internships

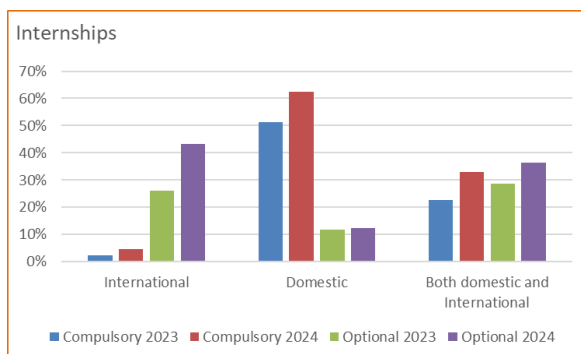


Figure 135 - Internships - university staff

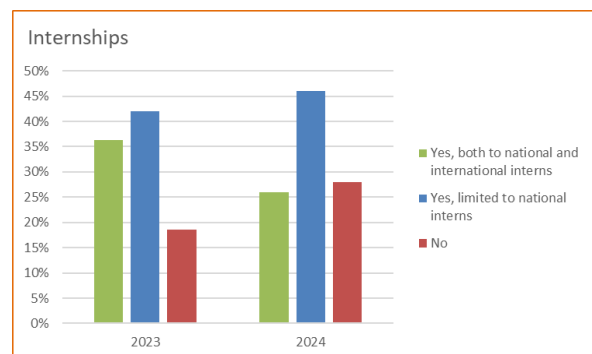


Figure 136 - Internships - language companies

Based on this year's university staff data, international internships are booming, with a more than 15% increase. Not surprisingly given the financial, insurance and regulatory hurdles, these are largely optional.

For domestic internships however, university staff report a more stringent approach, with more than 60% of the participants stating that these are compulsory, which is a 10% jump compared to 2023.

Sadly this positive evolution is not followed by the language companies. 28% of participants report that their company does not accept internships, compared to 19% last year. And a similar drop is seen in companies that accept both domestic and international internships (26% vs 36%). This drop undoes completely the increase reported in ELIS 2023.

The main reason for not accepting interns is still the lack of resources or critical size. It is understandable that in an adverse economic climate, companies will want to avoid any additional strain on their structure.

Those who do offer internships often cite that they give priority to former interns when they are recruiting. Some language company participants also mention the possibility of participating in remote internships.

ANALYSIS METHODOLOGY COMMENTS

Mid-point averages	<p>Many answer options represented a volume, revenue or percentage range such as “21 – 50%” or “2 – 5”.</p> <p>Averages of these answers have been calculated by using mid-point values: “21 – 50%” was converted to “38%” and “2 – 5” became 3.5.</p>
Median vs average	<p>For a few questions, results are analysed using the median value (the value at the midpoint of the series of values that is analysed) instead of the typical average (the sum of all the values, divided by the total number of values). This is typically done when the series of values contains so-called <i>outliers</i>, i.e. values that are far below or above the average. Median is for instance used to determine the staff size of a <i>typical</i> language company, since a few very large agencies can easily bias the standard average.</p>
'Don't know' answers	<p>'Don't know' answers are typically left outside the calculation of percentages or averages.</p>
Respondents per country	<p>For mature language service countries, ELIS uses a target threshold of 10 companies and 20 independent professionals. For smaller economies, this threshold has been set to 5 and 10 respectively.</p> <p>These thresholds are the same as in previous years. Data for countries with lower response rates should be used with caution.</p>
Market evolution	<p>% Increase and strong increase responses - % decrease and strong decrease responses divided by the number of responses after deduction of “don't know” answers.</p>
Investment mood	<p>[Investment in 2024 * 2 + Investment later - Disinvestment later - Disinvestment in 2024 * 2] / number of answers.</p> <p>The reliability of country-specific sentiment scores depends on number of responses received from the individual countries. See table with country-specific thresholds.</p>

TABLE OF FIGURES

Figure 1 - ELIS 2024 responses per country and segment	6
Figure 2 - Language company size.....	7
Figure 3 - Language department organisation type.....	8
Figure 4 - Full-time vs part-time freelance.....	8
Figure 5 - Main activity of independent professionals.....	8
Figure 6 – Gender distribution	9
Figure 7 – Years of activity	9
Figure 8 – Certification – language companies	10
Figure 9 - Language company certification vs size	10
Figure 10 - Certification requirements - language departments	10
Figure 11 – Affiliation	11
Figure 12 - Language company affiliations.....	11
Figure 13 – Affiliations vs company size.....	11
Figure 14 – Sources of industry information – independent professionals.....	12
Figure 15 –Information availability – independent professionals.....	12
Figure 16 – Sources of industry information – university staff and students	12
Figure 17 - Information availability – university staff	12
Figure 18 – Market activity expectations	14
Figure 19 – Activity language companies and independent professionals	14
Figure 20 – Activity vs size segment.....	14
Figure 21 – Service origin of activity increase or decrease	14
Figure 22 - 2023 Price evolution.....	15
Figure 23 - 2024 Price expectations	15
Figure 24 - LSC buy-in rates vs size.....	15
Figure 25 - Average pricing – language companies.....	16
Figure 26 – Profitability – language companies	17
Figure 27 – Investments – language companies	17
Figure 28 – Staffing – language companies.....	17
Figure 29 - All market indicators - language companies	17
Figure 30 - 2023 performance per country – language companies	18
Figure 31 - All market indicators - independent professionals	19
Figure 32 - All market indicators - language departments.....	19
Figure 33 - 2023 market performance - language department organisation types.....	19
Figure 34 - 2024 market expectations - language department organisation types.....	19
Figure 35 - Industry indicators - university staff.....	20
Figure 36 - Industry indicators - students	20
Figure 37 - Academic indicators - university staff	20
Figure 38 - Student numbers.....	20
Figure 39 –Investment mood - language companies	21
Figure 40 - M&A stance - language companies.....	22
Figure 41 - Freelancing as a sustainable activity	22
Figure 42 - Freelancing as a sustainable activity vs seniority.....	22
Figure 43 - Trend opinions – all industry segments	23
Figure 44 – Trends opinions - language companies	23
Figure 45 - Trend opinions - independent professionals	24

Figure 46 – Trend opinions - language departments	24
Figure 47 – Trend opinions – university staff	25
Figure 48 – Trend opinions - students.....	25
Figure 49 - Challenges - language companies	25
Figure 50 - Stress factors of independent professionals.....	26
Figure 51 - Challenges - language departments	26
Figure 52 - Challenges – type of language department organisation	26
Figure 53 - Challenges - university staf.....	27
Figure 54 - Challenges - students	27
Figure 55 - Geographic origin of revenue - language companies.....	28
Figure 56 - Direct client ratio - independent professionals.....	28
Figure 57 - Direct client ratio impact on performance – independent professionals.....	28
Figure 58 - Direct client ratio impact on performance – language companies.....	29
Figure 59 – Direct client ratio expectations	29
Figure 60 – LSC services status and growth plans	29
Figure 61 - Activities - language departments.....	29
Figure 62 - Domain ranking - language professionals	30
Figure 63 - Domain ranking - language companies	30
Figure 64 - Professional practices - language professionals.....	31
Figure 65 - Language company major changes	31
Figure 66 - Performance indicators - language companies.....	31
Figure 67 – Organisation focus - language departments	32
Figure 68 - Organisation focus vs organisaton type.....	32
Figure 69 - Outsourcing levels - language departments	32
Figure 70 - Changes in outsourcing practice - language departments.....	33
Figure 71 - Outsourcing intentions - language departments	33
Figure 72 - Language company outsourcing practice.....	33
Figure 73 - Independent professionals' relationship with direct clients.....	34
Figure 74 - Collaboration with language companies.....	34
Figure 75 - Aspects of project management	34
Figure 76 - Technology implementation	35
Figure 77 - Actual MT use.....	35
Figure 78 - Technology implementation – university staff	35
Figure 79 - Technology implementation - university staff - evolution.....	35
Figure 80 - Technology implementation vs EMT status	35
Figure 81 - MT in majority of professional translation work.....	36
Figure 82 - Required technology improvements – university staff.....	36
Figure 83 - Technology use - independent professionals.....	36
Figure 84 - First time technology use and investment plans - independent professionals	37
Figure 85 - Technology training satisfaction	37
Figure 86 - Technology implementation - language departments.....	37
Figure 87 - Actual use of MT - language departments	38
Figure 88 – Technology implementation - language companies	38
Figure 89 – Actual technology use - language companies	38
Figure 90 - Technologies developed - language companies.....	38
Figure 91 - Preferred tools – translation memory.....	39
Figure 92 - Preferred tools - translation management	39
Figure 93 - Preferred tools – machine translation	39

Figure 94 - Preferred tool - remote interpreting.....	39
Figure 95 - Preferred tools - audiovisual localization.....	39
Figure 96 - Preferred tools- terminology management.....	39
Figure 97 - AI trend perceptions.....	40
Figure 98 - AI perceived impact.....	40
Figure 99 - AI implementation and actual use.....	40
Figure 100 - AI use cases.....	41
Figure 101 – Preferred tools - Generative AI.....	41
Figure 102 - Gen AI in translation training.....	41
Figure 103 - Gen AI challenge in translation training.....	41
Figure 104 - Formal rules for Gen AI use.....	42
Figure 105 - Formal rules for Gen AI use per country.....	42
Figure 106 - University participation in AI initiatives.....	42
Figure 107 – LSC staffing and recruitment.....	43
Figure 108 - Dedicated managers – language companies.....	43
Figure 109 - Work from home.....	44
Figure 110 - Work-life balance.....	44
Figure 111 - Career satisfaction – salary levels.....	45
Figure 112 - Industry stickiness - language companies.....	45
Figure 113 - Earnings independent professionals.....	45
Figure 114 - Private insurance and retirement provisions – independent professionals.....	45
Figure 115 - Finances vs years of activity - independent professionals.....	46
Figure 116 - Sustainable future vs seniority – independent professionals.....	46
Figure 117 - CPD importance.....	47
Figure 118 - CPD frequency.....	47
Figure 119 - Training frequency - language departments.....	47
Figure 120 - Training topics - language companies.....	48
Figure 121 - Training topics - language departments.....	48
Figure 122 - CPD topics - independent professionals.....	48
Figure 123 - CPD topics vs seniority.....	48
Figure 124 - Training methods - language companies.....	48
Figure 125 - Training methods - language departments.....	48
Figure 126 - CPD return on investment – independent professionals.....	49
Figure 127 - Skill importance and performance.....	49
Figure 128 – Training programmes.....	50
Figure 129 - Training programme specialisations.....	51
Figure 130 - Training programme languages.....	51
Figure 131 - Number of countries in which languages are taught.....	51
Figure 132 - Professional preparation in training programmes.....	52
Figure 133 - Professional preparation - EMT vs non-EMT.....	52
Figure 134 - Commercial assignments in simulations.....	52
Figure 135 - Internships – university staff.....	52
Figure 136 - Internships - language companies.....	52