



# EUROPEAN LANGUAGE INDUSTRY SURVEY 2025

Trends, expectations and concerns of the European language industry

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

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## 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 and their students, language service buyers, as well as private and public translation departments.

ELIS 2025 consists of 5 separate surveys tuned to the needs and interests of each industry segment. The surveys are built around a common core focused on market evolution and expectations. More specific topics are made available to interested participants through a list of optional topics that they can activate.

This edition continued to monitor the impact of AI on the language industry and paid particular attention to internship practices, which are largely considered as an effective way to introduce students to the reality of the professional environment.

1322 participants responded to this year's survey

- 654 independent language professionals (77% female, 21% male)
- 179 language companies (50% female, 46% male overall, 61% female among non-owner profiles)
- 71 language departments (82% female, 17% male)
- 137 university staff members (67% female, 31% male)
- 281 students (78% female, 17% male)
- 50 countries

For 11 countries there were enough answers to reach the reliability threshold for LSC answers and for independent language professionals the figure was 18.

Users of this report need to keep in mind that the data are not objective and verifiable. They reflect the personal opinions and expectations of the participants, which are not only built on reality but also on the general mood of the market.

ELIS participants mainly represent the European market of small and medium sized LSCs and independent language professionals. We can therefore not guarantee that the findings are representative of the global language industry or of specific segments that may be under-represented in the survey. Users should always apply proper judgment when interpreting the findings or when using them in their professional decision-making.

## EXECUTIVE SUMMARY

Last year's report described the situation as a market that was holding its breath, uncertain about the future. That veil of uncertainty has been partially lifted and what this year's ELIS participants are glimpsing does not make them happy.

The story repeats itself: last year's expectations were not met and therefore this year's expectations are toned down even more. For the first time in ELIS history, participating language companies expect not only their own activity to decline further, but also the global language industry and in particular their local language service market. Not surprisingly, they also report a drop in staffing levels and in the number of LSCs that are active in their market.

Independent professionals share the companies' views regarding their own activity, but are not yet predicting a downturn of the market as a whole. Nevertheless, almost one in four is considering ending their freelance career.

Language departments and universities maintain a more positive attitude but are also realistic about the language provider concerns and express their own, especially around shrinking budgets, loss of influence or dwindling student numbers.

All point the finger to an indiscriminate use of language technology, in particular artificial intelligence and dedicated machine translation, to cut costs and replace or minimise human translation work, even in cases where the technology is producing sub-standard output. Independent professionals experience this behaviour more frequently with large LSCs, which makes this client segment much less attractive for them.

It would be going too far to state that it is all doom and gloom in the language industry. The downturn hits small language companies and independent professionals, who make up the core of the ELIS audience, hard. According to third-party research however, the larger international LSCs are suffering less. And those focusing on voice-related services (interpreting, audiovisual), which are traditionally less represented in the ELIS results, are reported to even be thriving.

It is clearly high time for European SME players and independent professionals to decide how to react to the current situation, which three out of four companies consider as a structural change for the industry. Unfortunately, participant responses do not only express the expected anxiety and frustration, but also show that many are still in damage control mode and are not yet sure what to do to get off the slippery slope.

Associations have certainly an important role to play in this matter. They can, and should, help their members find a way forward by providing guidance, training and networking opportunities. Moreover, associations are best placed to assist policy makers in their efforts to create the necessary framework for a sustainable European language industry.

And it is now official: both LSCs and independent professionals confirm that machine translation is used in more than 50% of their professional translation work.

## 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 dark or light yellow delivered less than 100% or less than 50% of the response threshold. Data from these countries should be analysed with caution.

	All	Companies	Individuals	Training institutes	Students	Buyers & Lang.depts
Albania	2		2 [10]			
Argentina	1		1 [10]			
Austria	49	10 [10]	11 [20]	11	15	2
Belarus	1		1 [10]			
Belgium	97	10 [10]	7 [20]	12	61	7
Bosnia-Herzegovina	2		2 [10]			
Bulgaria	10	2 [5]	2 [10]	5		1
Canada	5	3 [10]	1 [20]	1		
Colombia	1				1	
Croatia	23	1 [5]	20 [20]	1		1
Cuba	1		1 [10]			
Czechia	30	6 [5]	11 [10]	1	11	1
Denmark	11	2 [5]	9 [10]			
Ecuador	1				1	
Egypt	1		1 [10]			
Estonia	9		5 [10]	2	2	
Finland	58		17 [10]	9	23	9
France	218	24 [10]	152 [20]	8	22	12
Germany	66	8 [10]	40 [20]	2	3	13
Greece	38	4 [5]	27 [10]	1	6	
Hungary	63	10 [5]	49 [10]	3		1
Iceland	1					1
India	3	1 [10]	1 [20]		1	
Ireland	20	1 [5]	14 [10]	3	2	
Italy	149	23 [10]	59 [20]	14	53	
Japan	1		1 [10]			
Latvia	9		5 [10]	2	2	
Lebanon	1			1		
Lithuania	5	2 [5]		2	1	
Luxembourg	2					2
Malta	2	1 [5]	1 [10]			
Mexico	1		1 [10]			
Netherlands	22	5 [10]	13 [20]	2		2
Norway	1					1
Poland	41	5 [5]	22 [10]	4	10	
Portugal	68	15 [5]	25 [10]	9	14	5
Romania	21	3 [5]	13 [10]	2	2	1
Russia	9	1 [10]	5 [20]		2	1
Serbia	18	2 [5]	11 [10]	4		1
Slovak Republic	20	4 [5]	10 [10]	1	5	
Slovenia	20	6 [5]	11 [10]	3		
Spain	126	16 [10]	42 [20]	24	44	
Sweden	6		5 [20]			1
Switzerland	10		4 [10]	1		5
Turkey	2		1 [10]			1
Ukraine	11	1 [5]	5 [10]	5		
United Kingdom	56	13 [10]	37 [20]	4		2
United States of Ame	9		8 [20]			1
Uruguay	1		1 [10]			
	1322	179	654	137	281	71

Figure 1 - ELIS 2025 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.

The ELIS survey does not claim to make any estimate of market size, even at a European level. 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.

### Participant type and size

#### Language companies

With 654 responses from independent language professionals and 88% 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.

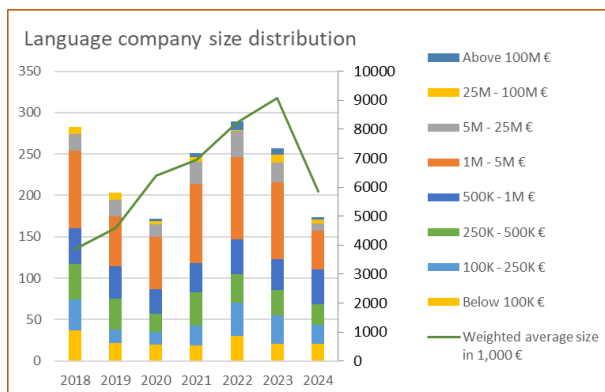


Figure 2 - Language company size

While the language company size segment 1 to 5 million euro remains the dominant one with 26%, it lost a lot of its aura compared to previous years (36% in 2024).

This is clearly related to the severe drop in average size of the participating companies, which is confirmed by the market evolution data.

85% of participating companies are family owned. The ratio of those that are publicly listed (only one) or that have venture capital backing remains stable at 7%.

#### Language departments

Among the participating language departments the ratio between public and private organisations has not changed dramatically, but we do see a stronger presence of national public agencies while international institutions are represented poorly.

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

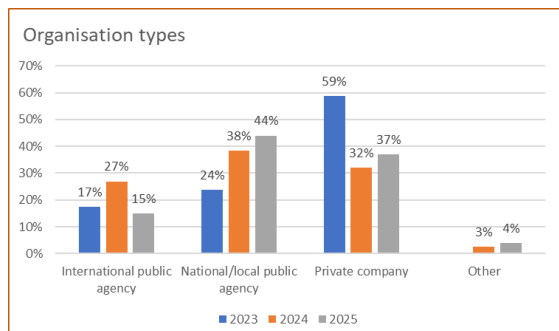
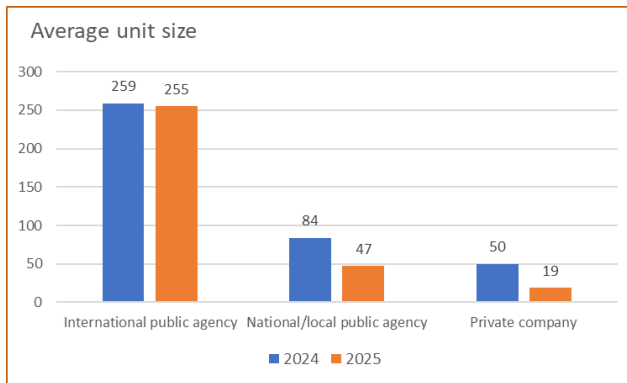


Figure 3 - Language department organisation type





The average size of participating language units dropped dramatically from 128 to 82 (despite the fact that the median value remained stable at 18).

The change is caused by an almost 50% drop in national public agencies and (a drop by almost 50%) and an even steeper one in private companies. Language departments in international public agencies did not report significant reductions.

Figure 4 - Language unit size

Half of the language department respondents indicate that their unit is not the only language owner in their organisation, both in companies and public agencies.

### Training institutes

Of the 137 participating representatives of training institutes, 71% belonged to a university that is member of the EMT network and only 26% to a non-member. This strong bias makes it more difficult to compare EMT with non-EMT institutes.

As in 2024, the EMT network label continues to lack visibility. Less than half of language company or language department respondents are aware of its existence and only 7% of language companies and 19% of language departments (none of the represented companies) take it into account during their recruitment process. Nevertheless, the survey results indicate that it continues to make a difference in specific areas such as professionalisation activities and technology usage.

A reassuringly low 4% of training institute participants indicate that they do not know if their institute is a member of the network, but with 16% that percentage is considerably higher among the Master students.

### Independent language professionals

The number of participating part-time language professionals is considerably lower than in 2024.

77% of respondents indicate that freelance language work is their full-time activity.

The tendency for full time professionals to select a single main activity (translation or interpreting) rather than combining both, which was seen in the ELIS 2024 data, is not visible in this year's responses.

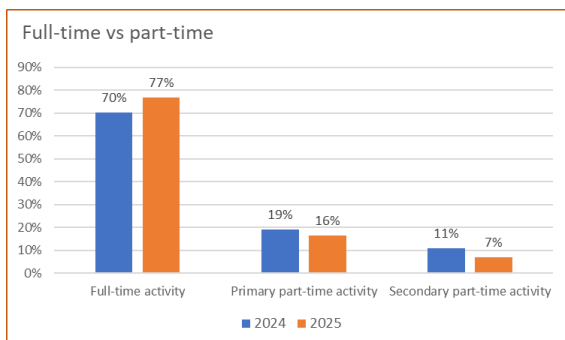


Figure 5 - Full-time vs part-time freelance

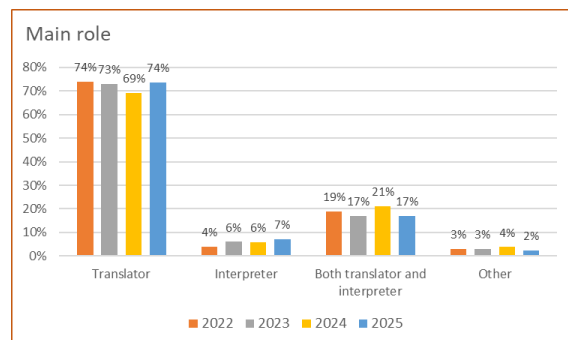


Figure 6 - Main activity of independent professionals

## Gender distribution

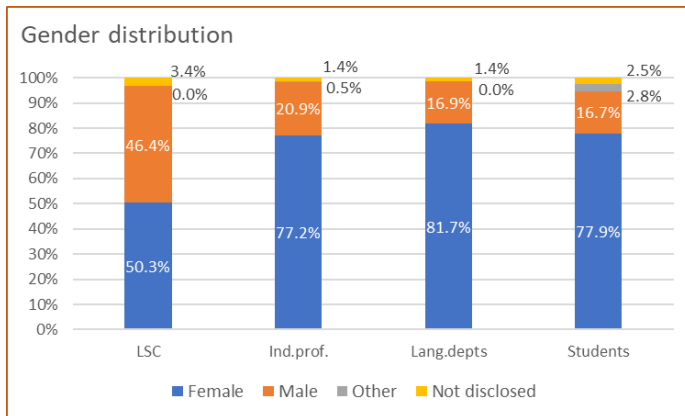


Figure 7 – Gender distribution

Except for language companies, the female dominance in the language industry is striking. Given the 78% among students, this is not likely to change in the future.

Even in language companies, we see a clear female majority of 61% among the non-owner profiles. Among company owners and general managers, however, the gender bias disappears.

## Seniority

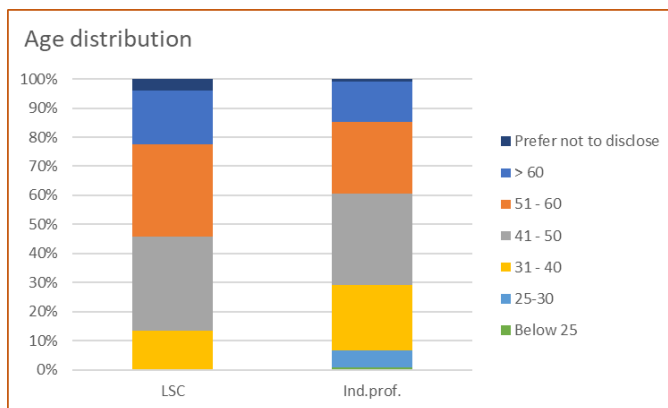


Figure 8 – Age distribution

The language industry is a fairly *old* industry, with an average age in the forties. The median age of language company respondents is 55 and 18% is over 60, which means that quite a number of the current business owners will be retiring or preparing for succession or exit in the coming years.

Unfortunately, despite further efforts to reach young professionals, the age range below 30 remains very poorly represented.

# CERTIFICATION, AFFILIATION AND INDUSTRY INFORMATION

## Certification

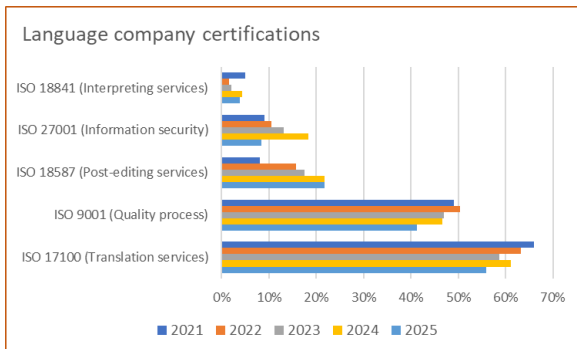


Figure 9 – Certification – language companies

ISO 17100 and 9001 certification levels are slowly dropping. Certification for post-editing (ISO 18587) is stagnating and ISO 27001 (information security) lost virtually all its momentum.

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

The apparent general loss in certification interest is undoubtedly at least partially due to the smaller average size of the participating language companies, in particular the segments between 1 and 10 M euro which are traditionally very active in certification.

Language department data, however, also hint at a waning interest in certification.

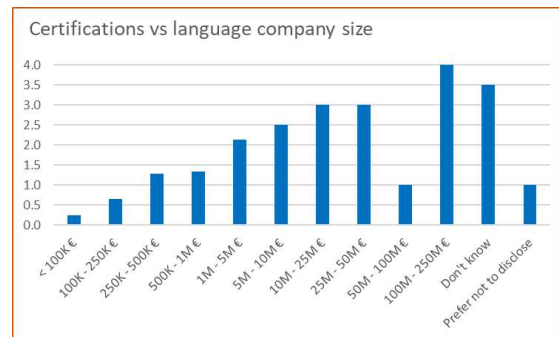


Figure 10 - Language company certification vs size

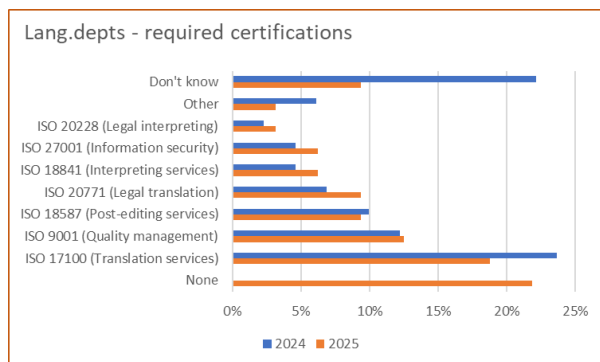


Figure 11 - Certification requirements - language departments

22% of respondents claim that their organisation does not require any type of certification from their language providers. The need for ISO 17100 – the most popular standard among language companies – dropped from 23% to 18%.

The further (modest) increase for ISO 20771 (legal translation) requirements is not visible in language company data since this standard is aimed at individual legal translators rather than language companies.

## Affiliation

Given that ELIS is actively supported by language associations, reported affiliation levels are not representative for the industry at large. Changes in affiliation levels may, however, indicate a shift in behaviour.

Independent language professionals report a lower affiliation rate (70% vs 77% in 2024).

50% of respondents belonging to language departments in private enterprises and (the under-represented) international public agencies do not know if their unit is a member of a language industry association. This is much less the case for national public agencies, the majority of which are a member of COTSOES and/or their national translators' association.

Industry information

University staff and students

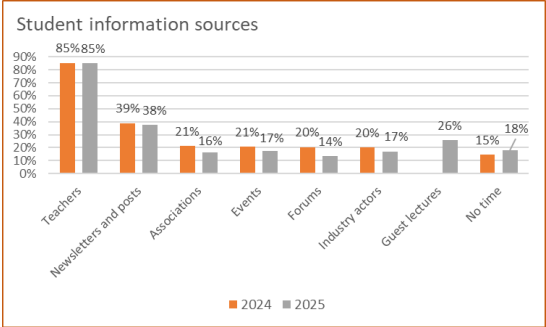


Figure 12 – Student information sources

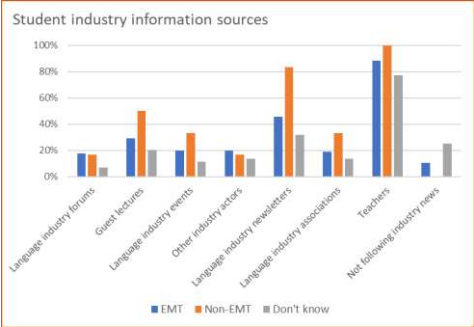


Figure 13 – Student information – EMT vs non-EMT

The 2024 increase in active student interest in language industry information is not visible anymore in the 2025 data. They rely primarily on their teachers, newsletters and guest lectures. Active involvement in events or forums, or contact with associations and industry actors score even lower than in 2024.

18% report that they do not gather industry information due to lack of time (15% in 2024).

Interestingly, students of non-EMT universities report a more active behaviour regarding industry information gathering, especially from industry newsletters and events.

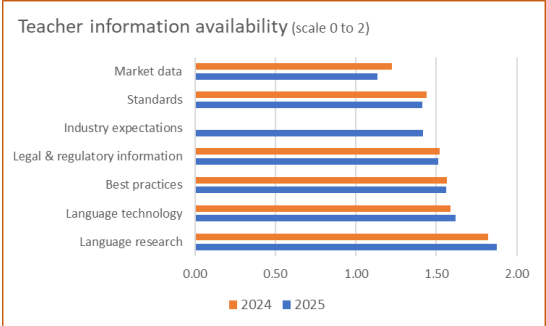


Figure 14 - Information availability - university staff

Teachers do not report any meaningful changes in information availability. EMT respondents score information availability significantly higher than Non-EMT participants.

## MARKET ON A SLIPPERY SLOPE

2024 has brought confirmation of the fears that language companies and independent professionals already expressed in the two previous editions of ELIS.

The downward trend for both actuals and expectations continues, not only for the participants' own activities but also for the market at large.

While third party market research indicates that larger language companies manage to control the damage, structural changes in the industry are wreaking havoc among small language companies and freelancers and force them to rethink their activities.

**IMPORTANT:** *except where indicated otherwise, the figures in the industry evolution charts below represent the difference between respondents reporting an increase and those reporting a decrease, applying a -2 (strong decrease) to +2 (strong increase) scale. They do not represent the actual level of increase or decrease.*

### Market performance

#### Market activity

Whereas in ELIS 2024 net 31% of language companies and 12% of independent professionals still expected their own activity to grow, they are forced to review their expectations dramatically downward. Both now expect their activity to stagnate in 2025, the individuals being slightly more positive (+ net 2%) than the companies (- net 2%).

The reason: a dramatic drop in their own 2024 revenue, resulting in a negative -0.40 score for language companies and -0.31 for individuals. 50% language company respondents reported a decrease or strong decrease, on average by 19%. The 18% that still experienced an increase reported an average increase by 16%.

Respondents expressed not only negative expectations for their own activities but for the global and local language markets as well. For the first time a (small) net majority of language companies expect both of them to shrink in 2025.

LSC participants from 20 out of 27 countries expect their local market to shrink.

Independent professionals remained slightly positive about the global market's 2025 outlook, although they did see negative growth in 2024.

With these results, ELIS 2025 results are more pessimistic than those published in the [Slator 2025 Language Service Provider Index](#) (LSPI), which showed flat organic growth among the larger language companies. They are, however, in line with the higher number of revenue decreases that the LSPI records among smaller size boutique agencies.

All ELIS size segments below € 10 million report an average decrease of revenue in 2024.

77% of the LSC participants believe that the decline in activity is caused by structural changes in the industry itself (mainly referring to the rapid adoption of language technology and the resulting changes in client procurement behaviour), while 14% are still confident that business will return to

normal and 9% attribute the loss to external factors such as the global economy or geopolitical situation.

Language departments, university staff and students do not share the language providers' pessimism regarding the global market. Quite a sizeable majority of them still expect the market to grow.

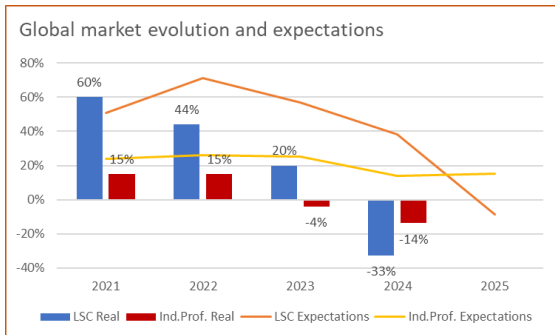


Figure 15 – Market activity expectations

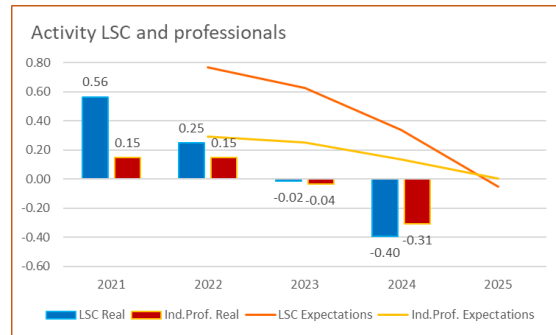


Figure 16 – Activity evolution

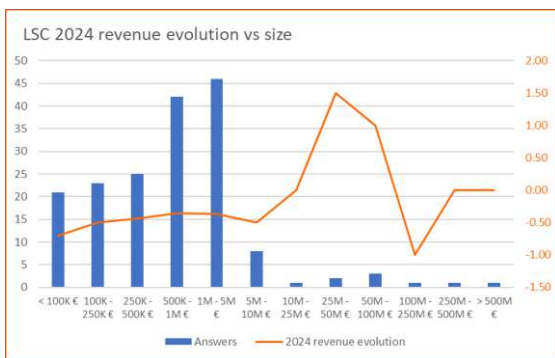


Figure 17 – Language company activity vs size segment

## Pricing and profitability

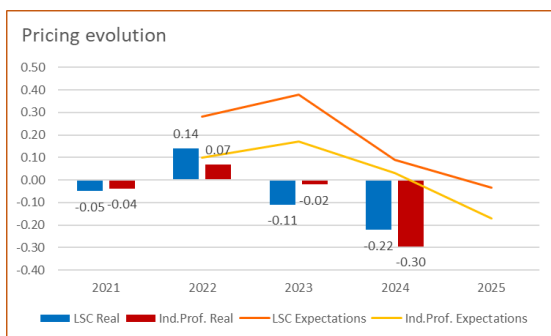


Figure 18 - Pricing evolution

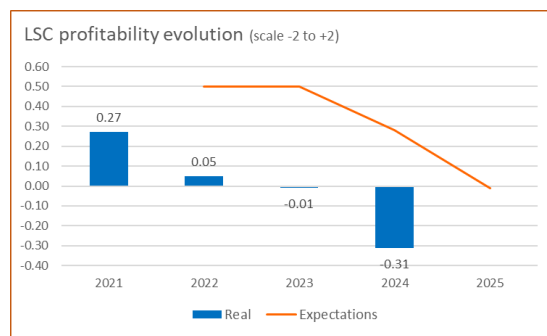


Figure 19 - Language company profitability evolution

The downward pricing trend that started in 2023 became more visible in 2024. Independent professionals expect further price erosion in 2025. Language companies (and also language departments) are less pessimistic and believe that prices will be fairly stable in 2025. For language companies, this also applies to buy-in prices.

The apparent contradiction between stable buy-in rates and lower freelance rate expectations may be linked to the more difficult price negotiations between professionals and large language companies, which are under-represented in the ELIS results.

Language companies report a drop in profitability but, as was the case in ELIS 2024, this perceived drop is not confirmed by the reported gross margins, which remained stable at 38% for translation and 24% for interpreting.

### Investment and staffing

The drop in volume and profitability inevitably has a strong impact on budgets, investment and staffing.

LSC investment levels dropped below zero to a net negative score (on the -2 to +2 scale) of -0.09 and language departments reported a language budget drop (a -0.24 score) in their organisation.

Staffing levels suffered severely. 39% of language company participants reported lower staffing levels and only 11% reported an increase. Language departments have very similar views, with 32% reporting a decrease and only 10% an increase. Restaffing is not expected in 2025 in either of them, quite the contrary.

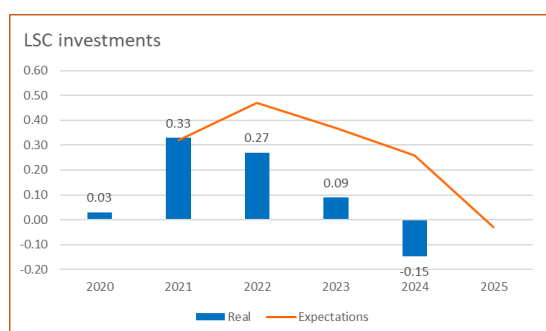


Figure 20 – Language company investments

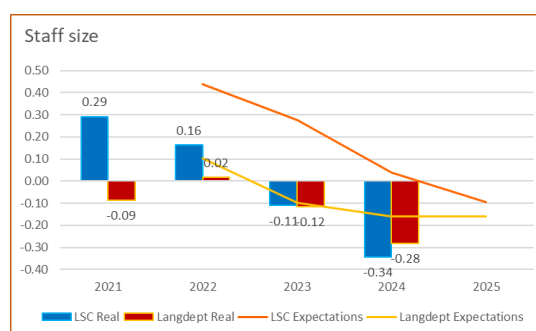


Figure 21 – Language company and language department staffing

### Operational indicators

Besides basic financial performance, each market segment is looking at specific parameters that are important for evaluating their own situation.

In this section, the comments focus on those segment-specific indicators. To put these in perspective, the charts also include the already commented-on financial parameters.

#### Language companies

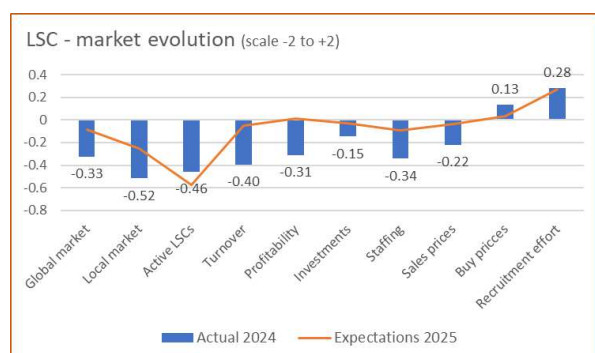


Figure 22 – All market indicators - language companies

81 participants saw the number of language companies in their market decrease, and even more (93) expect this also to happen in 2025. Only 13 saw an increase in 2024, while 65 report a status quo.

There were still 54 participants (30%) reporting an increase in recruitment efforts (13 saw a decrease), but a majority of 98 (55%) saw no change.

This clearly means that recruiting is becoming easier (In ELIS 2024 45% reported an increase), which is not surprising given the staffing evolution and the lower number of active LSCs.

For all 2024 actual performance indicators, male respondents reported worse results than female participants.

ELIS 2025 confirms the strong geographic differences in language company performance that previous editions have already revealed.

Country-specific performance differences

Note: countries highlighted in green provided enough answers to reach the reliability threshold, those in yellow did not reach the threshold, but provided 50% or more of the required number.

	Global market	Local market	Active LSCs	Turnover	Profitability	Investments	Staffing	Sales prices	Buy prices	Recruitment effort
Austria	-0.11	-0.30	-0.11	-0.50	-0.50	-0.20	-0.40	-0.30	0.22	0.22
Belgium	-0.78	-0.90	-0.78	-0.80	-0.50	0.22	-0.50	0.00	-0.20	0.00
Bulgaria	0.00	-0.50	0.00	0.00	-1.00	-0.50	-0.50	0.00	0.50	0.00
Canada	-0.33	-1.33	-0.50	-0.33	-0.33	-0.33	-0.33	-0.33	0.00	0.50
Croatia	-1.00	-1.00	0.00	-2.00	0.00	0.00	-1.00	0.00	1.00	0.00
Czechia	0.00	-1.00	-1.00	-0.60	-0.40	0.20	-1.00	-0.60	-0.40	0.00
Denmark	-1.00	-1.00	-1.00	-0.50	1.00	1.50	0.50	-0.50	-0.50	0.50
France	-0.82	-0.95	-0.83	-0.65	-0.57	-0.36	-0.18	-0.35	-0.09	0.14
Germany	-0.25	-0.75	-0.25	-0.88	-0.38	-0.25	-0.75	-0.13	0.25	0.13
Greece	0.75	1.00	-0.50	0.75	0.75	0.75	-0.75	0.25	0.00	0.50
Hungary	-0.33	-1.10	-0.60	-0.50	-0.30	-0.40	-0.60	0.00	0.30	0.10
India	1.00	1.00	1.00	1.00	1.00	1.00	0.00	-1.00	1.00	1.00
Ireland	0.00	0.00	0.00	-1.00	0.00	-1.00	0.00	0.00	1.00	0.00
Italy	-0.45	-0.59	-0.37	-0.39	-0.26	-0.13	-0.13	-0.43	0.26	0.57
Lithuania	0.50	0.50	-0.50	1.00	0.50	0.00	0.50	-0.50	0.50	0.50
Malta	0.00	1.00	1.00	0.00	0.00	0.00	0.00	-1.00	-1.00	2.00
Netherlands	-0.40	-0.20	-0.20	-0.20	0.20	0.20	-0.40	0.00	0.20	0.20
Poland	-0.60	-0.20	-0.50	-0.60	-1.00	-0.60	-0.60	-0.40	0.75	0.25
Portugal	-0.53	-0.47	-0.64	-0.53	-0.60	-0.86	-0.40	-0.33	-0.07	0.27
Romania	0.33	0.67	-0.33	0.00	-1.00	-0.67	-0.33	0.00	0.67	-0.33
Russia	0.00	0.00	0.00	1.00		1.00	0.00	-1.00	0.00	0.00
Serbia	0.00	-0.50	-1.00	0.50	0.00	-0.50	0.50	0.00	0.50	0.50
Slovak Republic	-0.25	-0.50	-0.25	-0.25	-0.25	0.00	-0.50	0.25	0.00	0.00
Slovenia	0.33	-0.50	-0.20	-0.17	-0.83	0.40	-0.83	-0.83	0.83	0.20
Spain	-0.07	-0.19	-0.43	-0.06	0.31	0.07	-0.20	-0.25	-0.19	0.53
Ukraine	-1.00	-2.00	-1.00	-1.00	-1.00	0.00	0.00	0.00	0.00	-1.00
United Kingdom	-0.18	-0.25	-0.23	-0.38	-0.31	0.00	-0.15	0.50	0.42	0.42

Figure 23 - 2024 performance per country – language companies

Independent language professionals



Figure 24 - All market indicators - independent professionals



Figure 25 - Independent professionals in local market

Although independent professionals expect the number of language providers in their local market to slightly drop, they also think that competition will increase significantly, as it already did in 2024. This combination is linked to price pressure and a general loss of activity in the market, which is also commented on in the [Industry sentiment section](#) below.



### Language departments

Language departments clearly expect 2025 to be more of the same.

They agree that competition between language providers will continue to increase. But despite the expected further drop in their own budget, which is likely to fuel competition even more, they do not share the fear that the language market will be shrinking.

Increasing workload and staff cuts, though both still modest, promise to create a challenging environment.

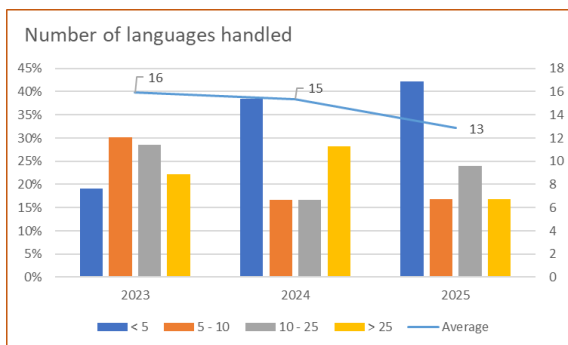


Figure 27 - Language departments - number of languages handled

In several areas these results hide considerable differences between the various organisation types.

This is particularly the case in workload, where international public agencies continue to report a much stronger increase than their national or private colleagues.

The same goes for outsourcing rates (which private companies even expect to decrease) and recruitment efforts.

All of them however agree that the language industry will continue to grow, that they will be dealing with staff and budget cuts, and that data security and technology integration will again be high on the agenda in 2025.

### University staff and students

Although teachers remain their main source of information about the language industry, students show again (as in 2024) that their opinions about the language market and its employment potential matches those of the language providers. This is at least partly linked to the influence of internship



Figure 26 - All market indicators - language departments

Technology integration is predictably high on the participants' minds, as is data security. This has not changed.

14 participants indicate that they increased the number of languages in 2024 and only 3 reported a decrease. Which is somewhat surprising since the average number of languages continued to drop, but it is probably due to the lower representation of international public agencies.

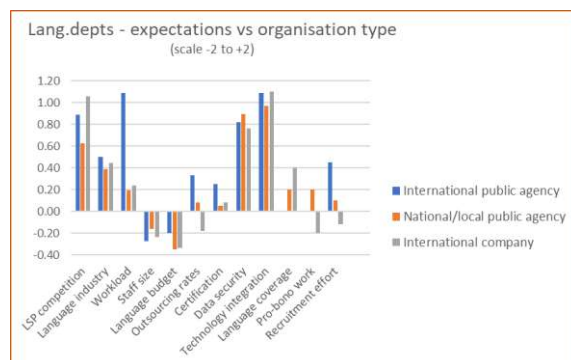


Figure 28 - Language departments - 2025 expectations vs organisation type

partners. Students who did an internship have dramatically lower expectations regarding market growth and employment opportunities.

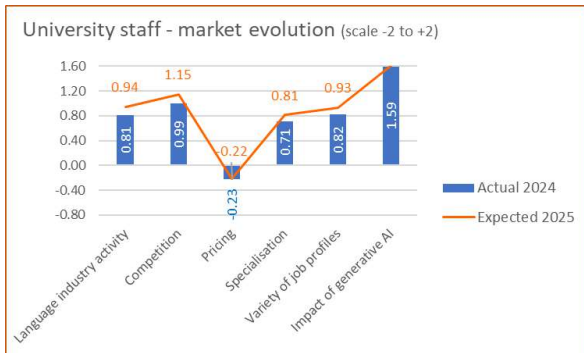


Figure 29 - Industry indicators - university staff

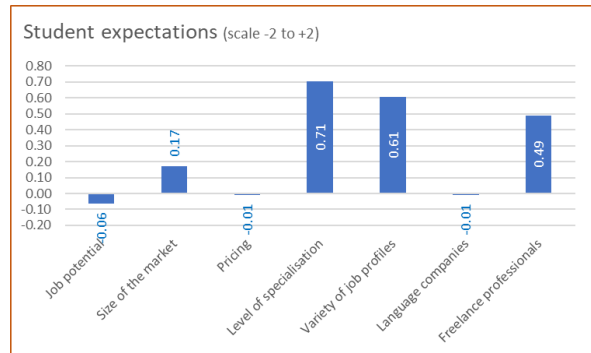


Figure 30 - Industry indicators - students

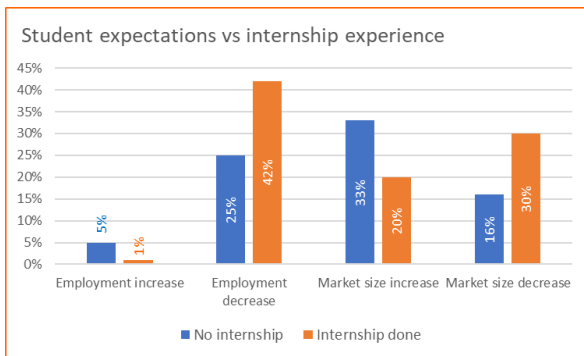


Figure 31 - Student expectations vs internship experience

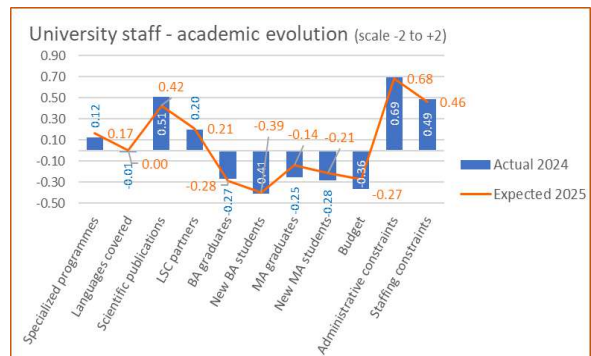


Figure 32 - Academic evolution - university staff

They do not expect languages to be cancelled and a few respondents even predict an increase in specialised programmes.

The fear of dwindling student numbers, however, is reaffirmed by 2024 actuals, and university staff expect this trend to continue in 2025, together with budget cuts (which were not yet expected in 2024).

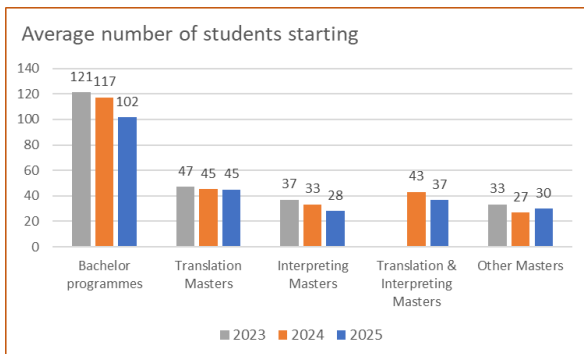


Figure 33 - Student numbers

The average student numbers confirm the this decline, especially among bachelor programmes.

This evolution is not (yet) fully visible in the Masters averages.

*Note: one high number entry had to be removed from the calculation due to unrealistic numbers for the interpreting Masters.*

## INDUSTRY SENTIMENT

### Language company mood

Sentiment = (Investment score - disinvestment score) / Number of companies. 0 = neutral. Empty = no answers  
 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	2025
Austria	10	8	1	0.67	1.30	0.70	0.30	0.89	1.50	0.50	0.70
Belgium	10	7	5	0.62	0.57	0.80	0.70	0.92	0.43	0.50	0.60
Croatia	1	0	1	0.53	1.07	0.20		0.38	0.00	0.00	-1.00
Czech Republic	3	6	0	1.40	1.20	0.50	1.00	1.33	1.00	0.67	1.67
Denmark	2	4	0	0.00	1.00	1.00	0.50	2.00	2.00	2.00	1.50
France	24	17	3	1.1	0.53	0.7	0.00	0.00	0.82	0.82	0.67
Germany	8	4	2	0.80	0.89	1.60	0.40	0.88	0.75	1.08	0.38
Greece	2	8	2	0.70	1.20	0.70	1.00	0.50	1.43	1.20	3.50
Hungary	10	6	3	1.00	0.88	0.70	0.00	0.67	0.62	0.78	0.50
Ireland	1	0	0						1.05	-2.00	-1.00
Italy	25	13	2	0.91	0.76	1.30	1.00	0.47	0.29	0.58	0.48
Lithuania	2	1	0		0.71	0.80	1.20	1.20	0.89	-0.33	0.00
Netherlands	5	4	0	1.27	1.42	1.00	0.90	0.75	1.00	0.29	0.60
Poland	5	1	2	1.00	0.80	0.40	0.00	0.70	1.50	0.89	0.00
Portugal	15	4	6	0.92	1.18	1.00	0.70	0.44	-0.50	0.70	0.20
Romania	3	2	0	0.71	0.43	1.00	1.20	1.00	1.00	1.00	0.33
Russia	2	2	0	2.00	0.86	2.00	0.60	1.00	1.60	1.00	0.50
Serbia	2	2	0						0.54	0.00	0.50
Slovak Republic	4	4	1	0.60	0.67	1.00	1.00	1.00	1.75	0.67	0.75
Slovenia	6	4	0	1.36	1.44	0.90	0.20	1.17	2.00	0.60	0.50
Spain	16	20	3	0.76	0.56	0.70	0.10	0.47	0.50	0.27	1.19
Ukraine	1	0	0	2.00	2.00		2.00		0.97	1.33	-1.00
United Kingdom	13	10	2	0.53	1.10	0.80	0.80	0.74	0.60	0.87	0.69
Country average				0.94	0.98	0.89	0.68	0.84	0.94	0.58	0.53
Weighted average				0.85	0.89	0.89	0.57	0.77	0.88	0.66	0.61

Figure 34 - Investment mood - language companies

With market activity, price and profitability levels declining further, it is no surprise that language companies continue on their downward investment mood slope. 2025 hits another historic low in standard country average. In terms of weighted average, taking into account the number of answers from each individual country, only the infamous Covid year 2020 did worse.

It has to be said though that the high number of countries which did not reach the reliability threshold makes this average uncertain, since a number of the 'green' countries do show an improvement in their mood score.

It is also worth noting that, contrary to ELIS 2024 findings, the investment and disinvestment intentions of female owners result in a higher average score (0.70) than those of their male counterparts (0.45). This is hardly surprising given that male respondents report worse market performance in all 2024 indicators.

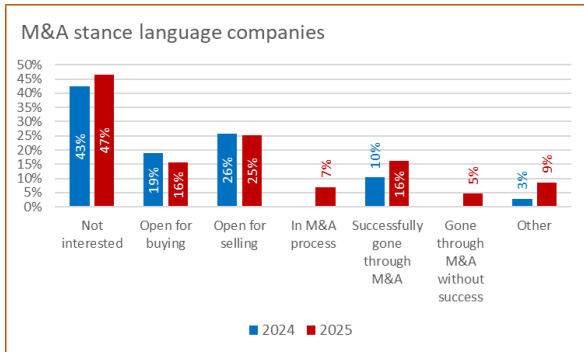


Figure 35 - M&A stance - language companies

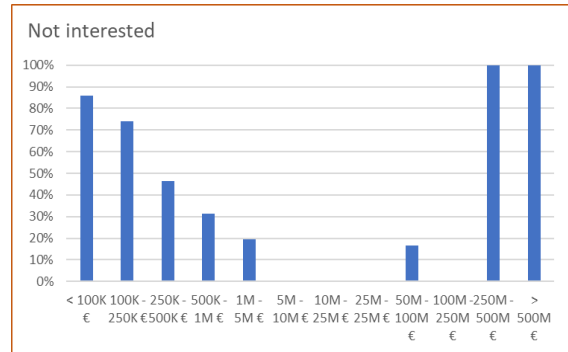


Figure 36 - Not interested in M&A - language companies

Language company owners are becoming more and more familiar with M&A matters. The slightly higher score for “Not interested” might be interpreted as an indication that the M&A pond is slowly drying up. This is definitely not the case.

Only the smallest size segments show a major lack of interest. In the best represented segments, between 1 and 10M euro, all participants indicate that they are open to M&A transactions one way or another. The “Not interested” responses in the large size segments are each coming from only one respondent and can therefore not be considered representative.

### Independent professional sentiment

Independent language professionals express even more alarming sentiments, especially in their free text comments.

While the percentage of professionals that earn enough from freelance activity has only declined marginally, and people are obviously trying to keep their retirement provisions intact, the overall opinion that freelancing is a viable long-term option has dropped below the 50% mark, which should be a serious wakeup call. This drop in confidence is visible in all seniority classes. The most junior ones, which still showed a lot of confidence last year, have lost it completely.

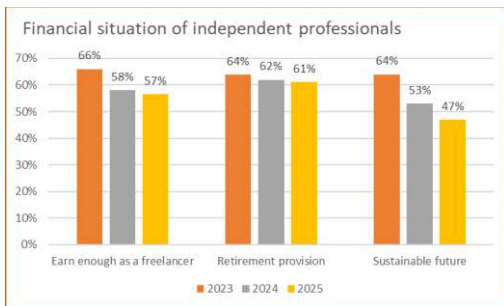


Figure 37 - Freelancing as a sustainable activity

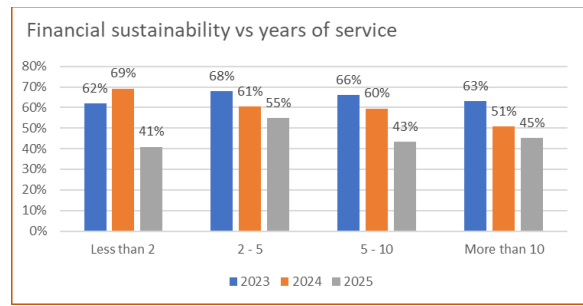


Figure 38 - Freelancing as a sustainable activity vs seniority

This loss of confidence is linked to a mix of real loss of income and activity on the one hand, and a general decline of their economic and work environment. Stronger price pressure, especially from large language companies, a drop in work volume and the generalised move from human translation to discounted and less-valued post-editing make 53% of the participants question their future as a freelance professional. It is therefore not surprising that 23% are considering ending their freelance activity.

The trend and challenge section below provides a closer analysis of these concerns.

## TRENDS AND CHALLENGES

### Trends

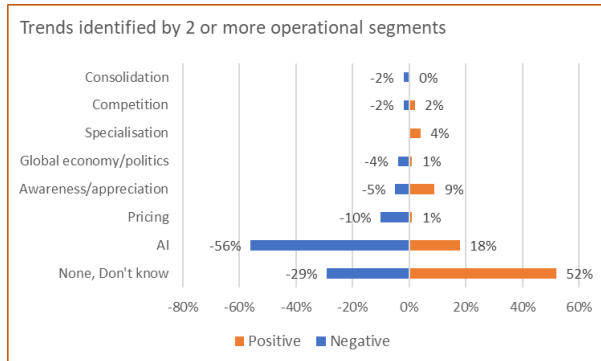


Figure 39 - Trends

AI and language technology in general dominated and polarised the industry even more than before.

Both independent professionals and language companies link the trend directly to indiscriminate use by clients, loss of quality and appreciation, and increased price pressure.

Language companies and language department are much more balanced in their opinions regarding language technologies. Although these are seen more as a negative than a positive trend, these respondents mention the positive aspects more often than independent professionals.

While pricing remains visible as a negative trend, the trend comments imply that it is now predominantly seen as a direct consequence of the technology trend.

The overall negative trend sentiment is clearly visible in the 52% of respondents not mentioning any positive trend.

In almost all ELIS editions, specialisation is identified as a positive trend. Unfortunately, this trend is not visible in this year's data, especially with regards to work for specific client sectors. Quite the contrary. Both language companies and independent professionals report lower levels of specialisation (number of answers where a specific sector represents more than 50% of the activity) than in 2024.

Trends are often segment-specific. What is positive for one segment may be negative or irrelevant for another. Below is an overview of the trends for each segment separately.

#### Language service companies

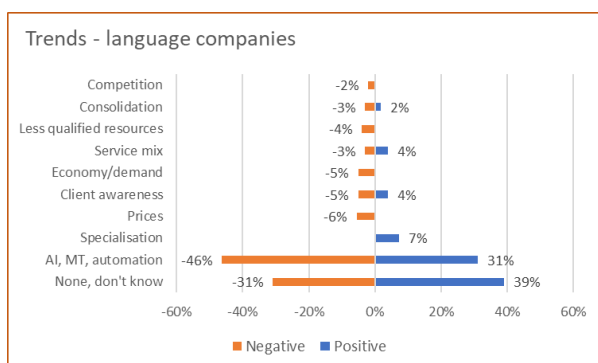


Figure 40 – Trends opinions – language companies

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.

Among language companies, those smaller than € 1M are much more critical (47% negative and 22% positive), than their larger colleagues which showed even more balanced opinions (29% for both negative and positive) than the language departments (31% positive and 39% negative).

A correlation between company size and the client type mix (direct clients vs other language companies) could not be found.

Specialisation is seen as a necessity in the changing industry.

Client awareness is a mixed basket. Respondents expect client awareness and appreciation to further decline or to increase, depending on their experiences (positive or negative) with AI and MT. Among language companies, both opinions almost balance out.

The same can be said about the service mix. Some respondents deplore the loss of traditional services while slightly more applaud the possibility of developing new ones.

A fair amount of respondents believe that the global economy and geopolitical situation will cause the demand for language services to decline, and that it will become more difficult to find suitable resources.

Consolidation changed from a slightly positive trend last year into a slightly negative one. This may be due to the change in company size mix.

Other potential trends that were mentioned include an increase in interpreting and sworn translations.

Interestingly, competition has almost disappeared from the trend opinions.

Independent language professionals

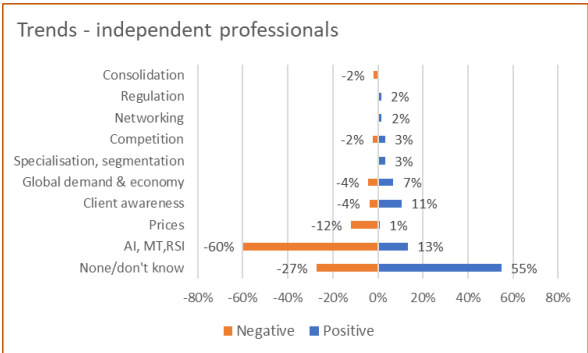


Figure 41 - Trend opinions - independent professionals

Independent professionals express their negative opinions about AI and MT most strongly. Only 13% mention these technologies (also) as a positive development.

Interestingly, it is here that we see the highest score for client awareness. Quite a high number of individuals expect clients to realise that AI is not the wonder solution that they thought it would be, triggering an increase in appreciation for and a return to human language services.

Against all odds, language professionals are also more positive about global demand, based on increased globalisation and needs for specific services and languages.

Specialisation, and in particular a segmentation of the market in two main parts – standard industrial post-editing vs high quality human translation – are mentioned as well. This trend was also present in 2024.

Competition is still visible, but is thought to decrease due to professionals and agencies leaving the industry, creating a net positive opinion.

## Language departments

Language department participants show the highest number of positive opinions about AI (and MT). The trend comments clearly show that they consider these technologies (in particular AI) as a necessary tool to meet their internal clients' needs and to make their own work easier and more efficient.

This increased efficiency is needed to cope with certain negative trends such as smaller budget and staff, and the increased workload that was not mentioned in the trend comments but is clearly visible in the market evolution data.

Language departments agree with language companies that it is not clear in which direction client awareness will evolve. The same applies to the rates at which they buy language services. The same number of respondents expect those to increase and to decrease.

About resource availability, however, they have no doubt: it will become more difficult to find suitable resources.

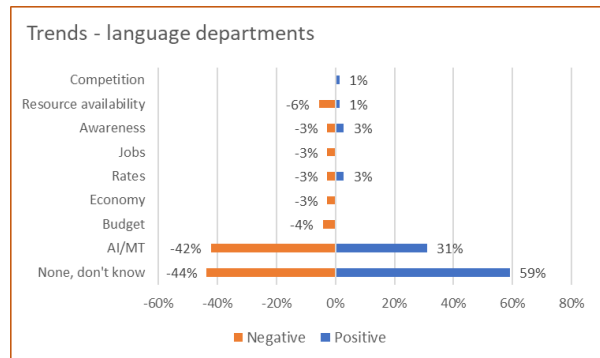


Figure 42 – Trend opinions - language departments

## University staff and students

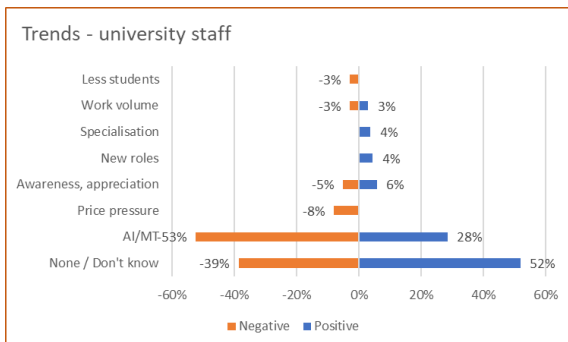


Figure 43 – Trend opinions – university staff

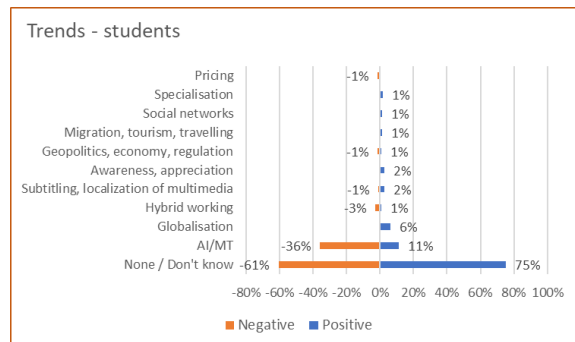


Figure 44 – Trend opinions - students

The number of university staff members that did not answer the trend questions or indicated that they could not think of any specific trend dropped to more average levels. Among students it remains extremely high, which means that industry awareness remains fairly low.

Those that did answer the question identify AI/MT as the main trend, with a stronger negative bias than in 2024.

## Challenges and reactions

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

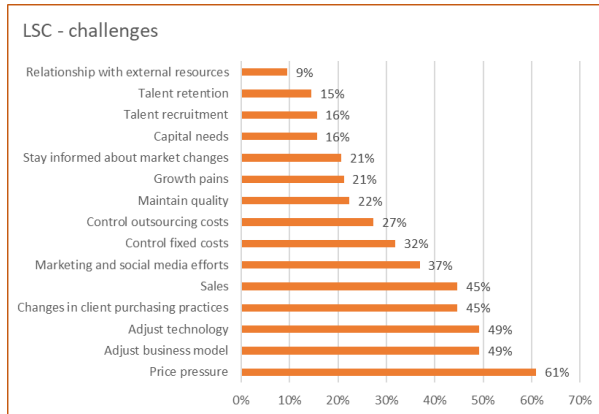


Figure 45 - Challenges - language companies

The language company challenges reflect the falling activity levels, with sales-related challenges leading the ranking, followed by cost-control measures.

Talent or resource management are considered less of an issue in an environment characterised by staff cuts and lower work volumes.

Although 77% of the language company respondents consider the current situation to be linked to long-term structural changes in the industry, their reactions are still strongly focused on traditional measures such as additional sales and marketing efforts and cost-cutting through lower fixed costs and automation.

Only 29% consider further renegotiation with language resources.

55% are interested in developing new activities, but only 35% would consider a change of focus with regards to client sector, content type etc.

Finally, only 8% are considering selling their business.

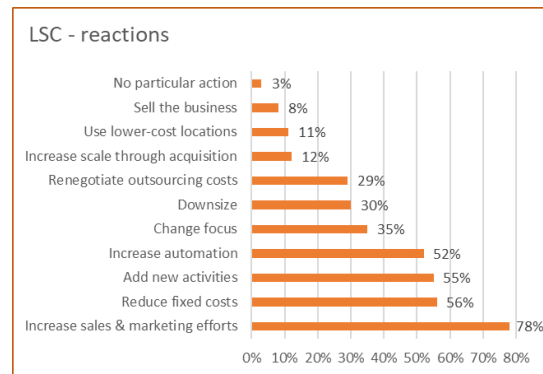


Figure 46 - Reaction to decline - language companies

### Independent language professionals

Stress factors are a good indicator and cross-check of the mood among independent language professionals. They confirm the ongoing decline of the professionals' work environment, with financial insecurity at the core, but the rise of technology at the root.

As in 2024, professionals blame the indiscriminate (some call it reckless) usage of AI for the lower work volumes as well as for the loss of income due to the replacement of human translation by post-editing.

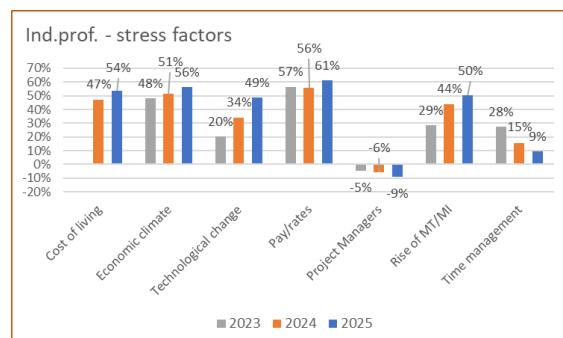


Figure 47 - Stress factors of independent professionals



From the open ended questions emerges a deep sense of frustration and a lack of control over one’s own professional future. Professionals feel trapped in a system where they cannot set boundaries due to irregular work, unstable income, and client expectations.

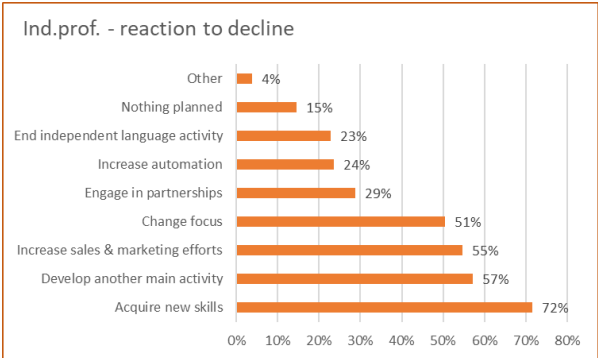


Figure 48 - Reactions to decline - independent professionals

Sadly, 23% of the participants indicate that they are considering ending their freelance activity.

On the other hand, a majority of professionals plan to react by adapting to the new situation: by acquiring new skills, developing another main activity or changing focus to different client sectors or services, or new types of clients.

Automation is not high on the radar, but engaging in partnerships and collaboration shows up more prominently here than in the trend comments.

Language departments

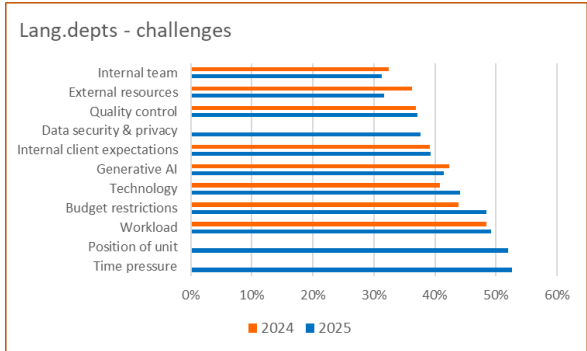


Figure 49 - Challenges - language departments

Language departments do not have the same existential challenges as language service providers, but are feeling the impact of the changes in the industry nevertheless.

Time pressure and the position of the department within the organisation are two new but very important challenges.

Both are intimately linked with the rise of AI use which may trigger organisations to question the unit’s value, especially since half of the respondents indicated that their unit is not the only language owner in their organisation.

Stronger budget restrictions are merely a logical consequence of the technology change and the generic economic climate.

## University staff and students

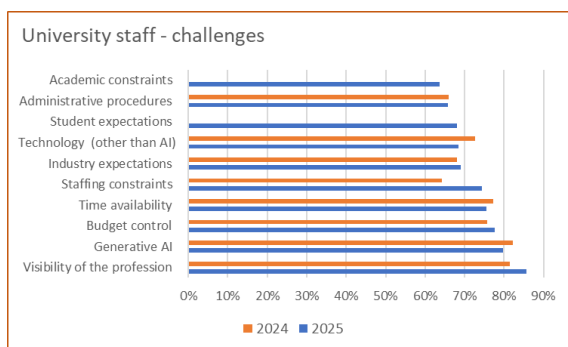


Figure 50 - Challenges - university staff

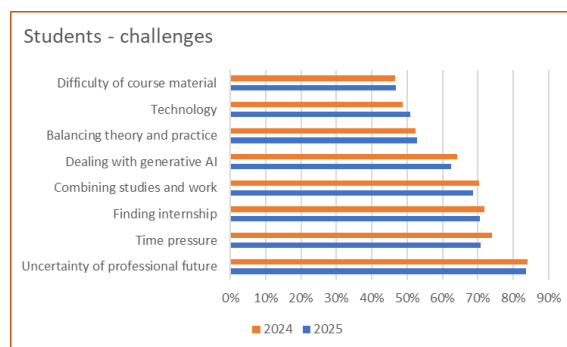


Figure 51 - Challenges - students

All topics score above 60% among university staff, but some are clearly even more challenging than others. Visibility of the profession is again the top concern – possibly fuelled by lower student numbers – but AI implementation and budget control are close second and third.

For students, handling AI or other types of technology continues to be somewhat less of a challenge. They remain primarily concerned with their professional future (the same high score of 83%). Time pressure and finding a suitable internship have taken spots two and three. Pushing the combination of study and professional work to fourth place.

## AREAS OF BUSINESS

In the graphs below, average 2024 revenue or activity performance is expressed in the market evolution scale of -2 (strong decrease) to +2 (strong increase), not in a percentage.

This performance is based on the general 2024 activity increase and decrease scores, weighted according to the importance of individual regions, client types, client sectors or content types.

### Geographic origin

The geographic origin of projects was only part of the survey for language companies.

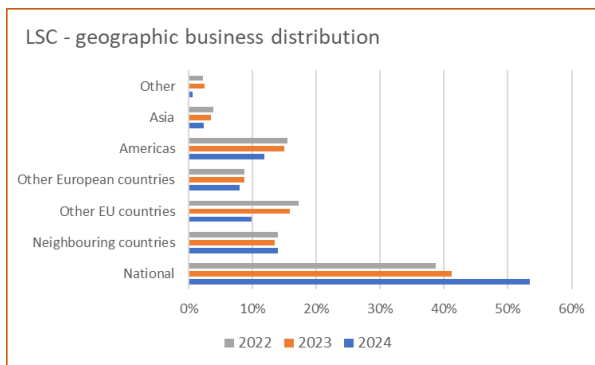


Figure 52 - Geographic origin of revenue - language companies

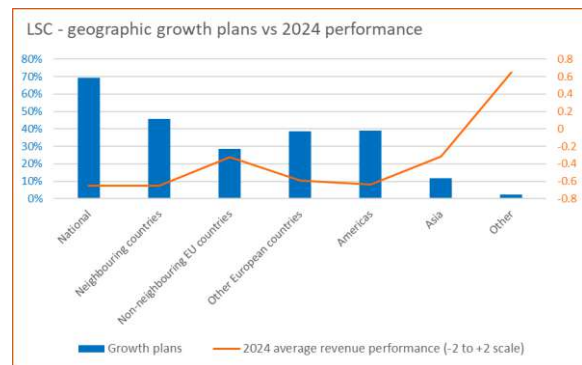


Figure 53 - Geographic growth plans vs performance – language companies

Although language companies report that on average their local market performed worse than the global one, the share of domestic business has considerably increased in 2024. This can only be explained by a loss of international business.

Growth plans reflect this reality, with a clearly stronger focus on the national market, rather than an attempt to regain lost ground abroad.

### Direct clients vs subcontracting

#### Independent professionals

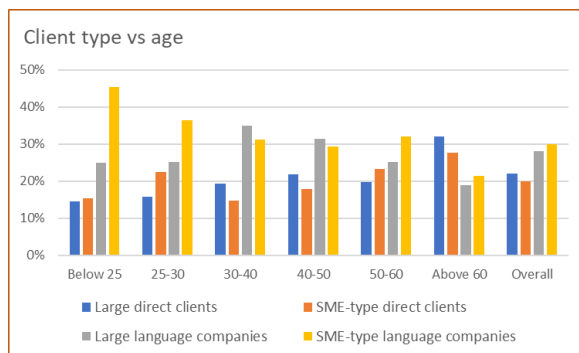


Figure 54 – Client type distribution - independent professionals

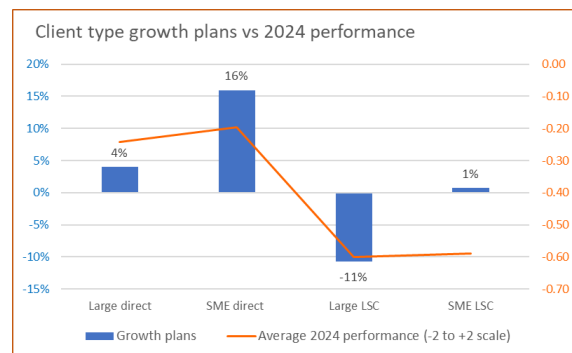


Figure 55 – Client type impact on performance – independent professionals

Independent language professionals report approximately the same direct client ratio as in their 2023 activity (42% vs 41%), after the substantial drop from the 45% reported a year earlier. That means that the increase expected for 2024 (net 15% of ELIS 2024 respondents planned such an increase) did not occur. The same happened in the previous year.

With growing seniority, the direct client ratio of independent professionals grows organically. Although growth plans should always be treated with some caution, the stark difference in 2024 performance between the different client types (even though all of them performed poorly) increases the current intentions to accelerate the shift towards direct clients. Whether these intentions will become reality will be seen in ELIS 2026.

Language companies

Language companies report a similar correlation, but their situation is different in two aspects.

Firstly, the direct client ratio of language companies is far higher than among independent professionals (69% vs 42%), and secondly the difference in 2024 performance between the client types is not as dramatic as the one reported by independent professionals. Large language company clients did indeed perform most poorly, but SME-type LSCs did even better than the direct clients.

Nevertheless, language companies show the same growth intentions as the individuals, with a clear intention to increase their direct client ratio. Contrary to independent professionals, language companies focus on large clients rather than the SME-type, which means that paradoxically large language company clients score almost as good as SME-type direct clients as a growth target.

They also do not intend to reduce the work with language company clients, but rather to grow them less than the direct clients, which is an important distinction.

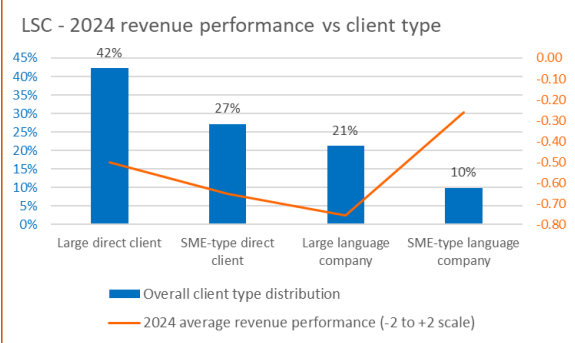


Figure 56 - Direct client ratio vs 2024 performance – language companies

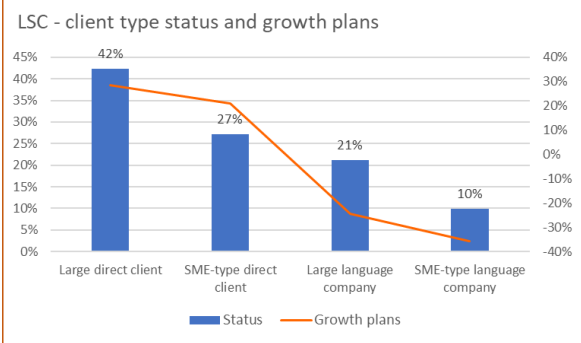


Figure 57 – Direct client ratio expectations – language companies

## Services (language companies only)

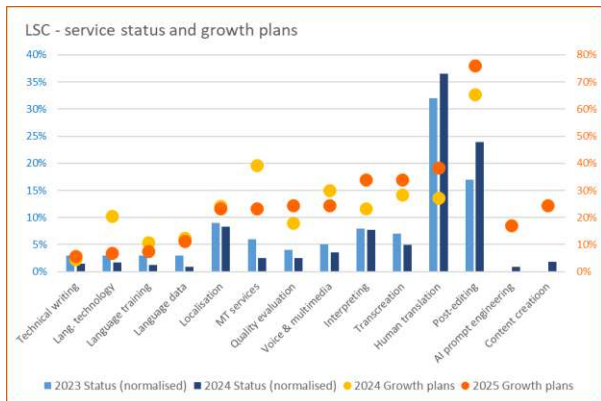


Figure 58 – Service status and growth plans – language companies

Note: status is normalised to 100%, while growth figures show non-normalised intentions (total more than 100%)

2025 growth plans are dominated by post-editing, although this activity did not perform better than average in 2024.

All other main activities are more or less at the same growth target level. Creative services such as content creation, transcreation and voice services show the strongest growth intentions compared to current status.

Language data services, never an important focus for ELIS participants, performed extremely poorly in 2024. This service is likely to be absorbed in AI-related services.

Normalising the total of all services to 100%, respondents report a substantial growth of post-editing by 700 BP to 27% of the revenue total.

Similar to what last year’s data showed, this increase did not lead to a corresponding drop in classic human translation, which also increased by 500 BP to 37%.

This means that 2024 growth plans for other activities did not materialise and were probably cut due to the poor market performance and a perceived need to concentrate on core business.

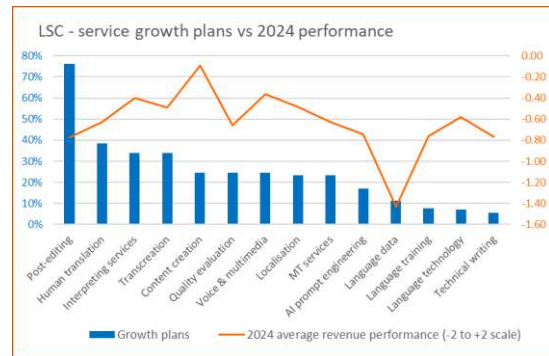


Figure 59 – Service growth plans vs 2024 performance – language companies

## Client domains

### Independent professionals

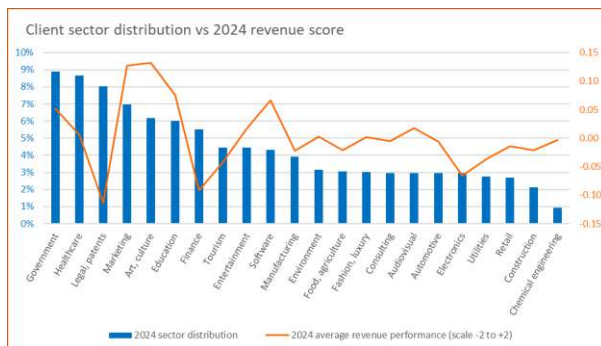


Figure 60 – Domain ranking – language professionals

Marketing (and web agencies) is a new category and immediately affirms itself as an important sector for independent professionals. This is also the case for art/culture and education, two sectors that were often mentioned under the Other category in the previous edition.

The client sector distribution did not change dramatically. Government and healthcare took over as leading sectors. Legal dropped from 11% to 8%.

The introduction of additional technical sectors such as chemical engineering and environment can only partly explain the sharp drop of the manufacturing sector (-500 BP from 9% to 4%)

These three new sectors performed better than average in 2024. Long time favourites Legal and Finance on the other hand are among the sectors with the poorest activity performance.

Language companies

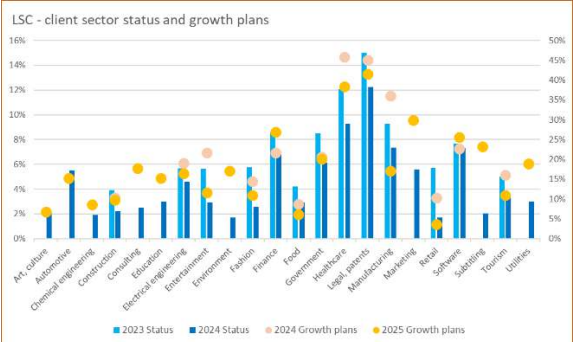


Figure 61 - Client sector status and growth plans - language companies

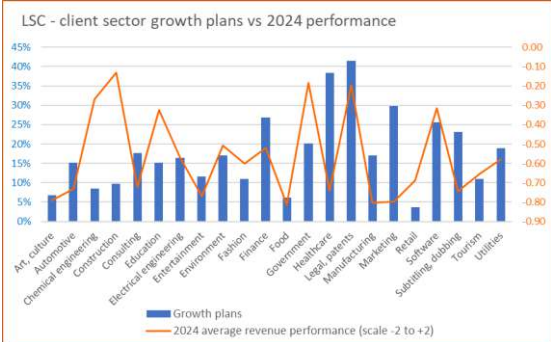


Figure 62 - Client sector growth plans vs 2024 performance - language companies

Language companies show a different client sector distribution than the individual professionals, but the ranking has not significantly changed.

The addition of several new sectors lowered the normalised scores of all existing sectors and may have cannibalised specific sectors. Even taking that impact into account, a few older sectors show a stronger than expected drop, in particular entertainment, fashion, retail and healthcare.

The higher ranking of healthcare in the independent professional ranking may hint at a shift towards freelance procurement in this sector.

Language companies show the same behaviour as independent professionals in not taking into account the 2024 revenue performance in their growth plans for individual sectors.

Content types (language companies only)

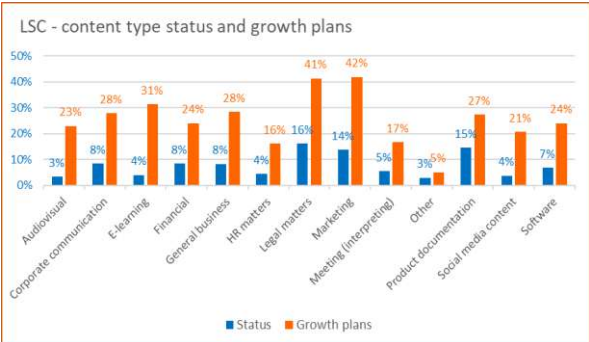


Figure 63 - Content type distribution and growth plans - language companies

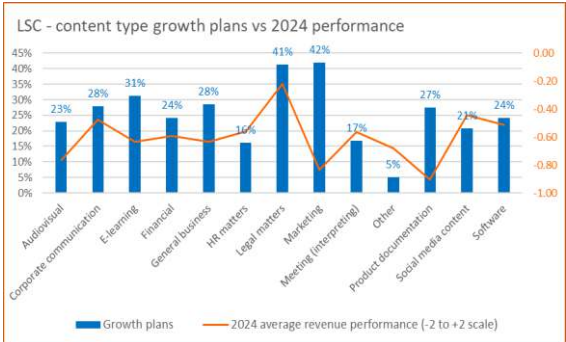


Figure 64 - Content type growth plans vs 2024 performance - language companies

Content types follow largely the corresponding client sectors. Legal content (irrespective of client sector) is the most widely handled content type, closely followed by product documentation and marketing material.

For most content types, growth plans follow the 2024 revenue performance. Exceptions are marketing content and product documentation. Both scored low in 2024 but are still important growth targets (marketing content is even the top target). Not surprisingly, related content types and client sectors have similar revenue performance scores (cf. marketing, legal).

# BUSINESS PRACTICES

## Financial conditions and negotiations

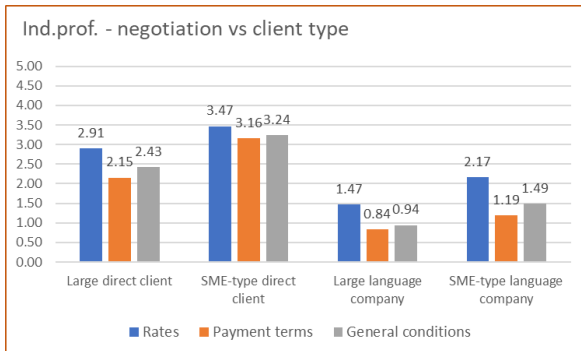


Figure 65 - Negotiation practices - independent professionals

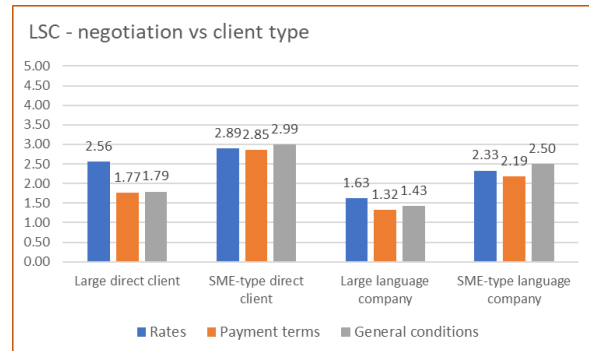


Figure 66 - Negotiation practices - language companies

Both independent professionals and language companies report that it is easier to negotiate rates than payment terms, and it will come as no surprise that respondents find it easier to negotiate with SME-type clients, whether direct clients or language companies, than with larger ones.

According to independent professionals, it is much more difficult to negotiate with language companies than with direct clients. A majority of professionals indicate that it is virtually impossible to negotiate payment terms or general conditions with large language companies. This lack of control is often mentioned in the free text comments and is one of the reasons for the increased frustration that independent professionals express in their answers.

Language company respondents agree that it is more difficult to negotiate with large language companies, but apparently a bit of an easier time in negotiating. Contrary to the individual professionals, they give higher negotiation scores to SME-type language companies than to large direct clients.

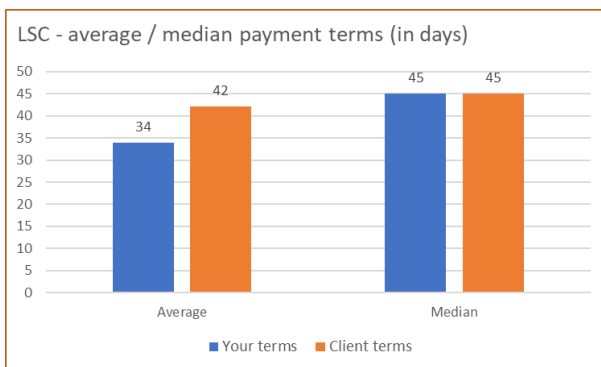


Figure 67 - Average payment terms - language companies

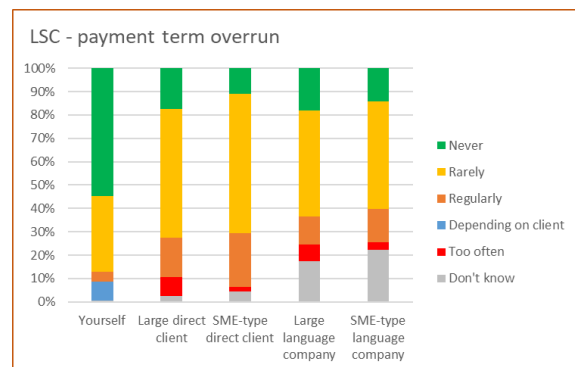


Figure 68 - Payment term overruns - language companies

Language companies report a median value of 42 days for their own client terms and 45 for their clients', which corresponds with the 30 to 60 day range. Only 6 language companies indicate that they apply a longer payment term, while 13 state that they pay within 15 days or less.

Over 60% of language company respondents indicate that payment overruns are rare or non-existent for all types of clients, direct clients scoring slightly better than language companies.

Ironically, 50% of these respondents give themselves a perfect on-time payment score, which is very unlikely given the less than 20% perfect score given to language companies as a whole.

## Relationship between independent professionals and language companies

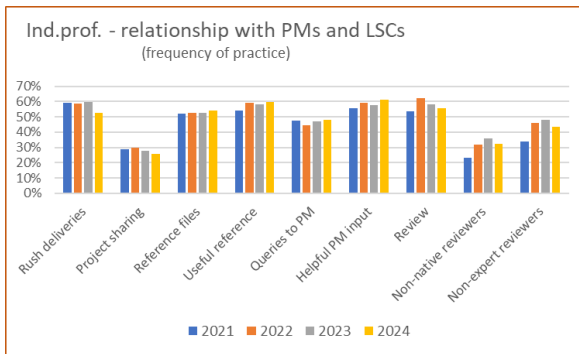


Figure 69 - Relationship with PMs and LSCs - independent professionals

ELIS 2025 data show a steady but slow improvement in the relationship between independent professionals and client project managers (in particular those employed by language companies).

Review practices is the only indicator that showed an erosion, almost back to the 2021 level.

Some of the improvements (ex. less rush deliveries) may also be the result of the lower general activity level.

## Focus and performance monitoring

### 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.

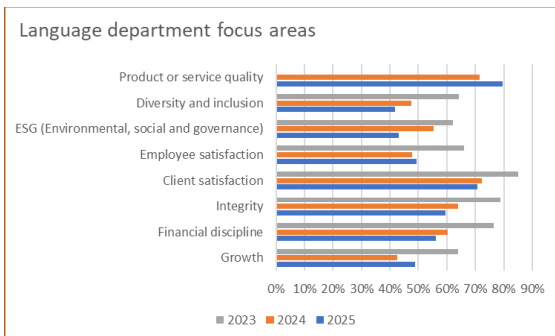


Figure 70 - Organisation focus - language departments

It is hard to compare this year's focus area scores with those of previous years due to the changing mix of organisation types and their strong differences in focus.

For instance, diversity is highly valued in international public agencies and will therefore suffer from the lower number of participants from these agencies.

Sustainability is a perfect case to illustrate the difference in focus between the various organisation types.

Contrary to what one might expect, the highest priority score is given by language departments of international companies, and not by international public agencies.

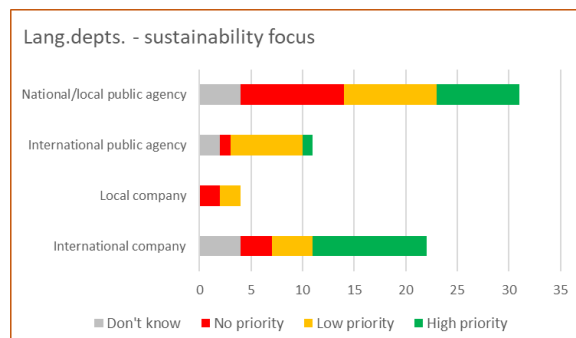


Figure 71 - Sustainability focus - language departments



## Language companies

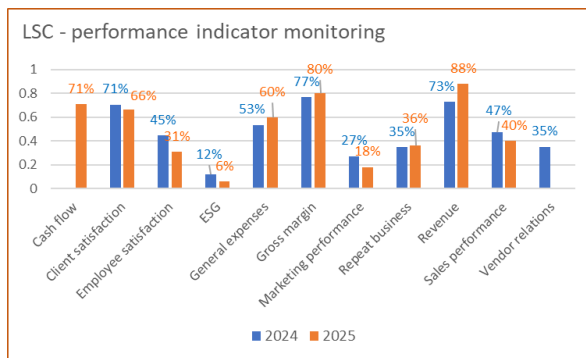


Figure 72 - Performance indicator monitoring - language companies

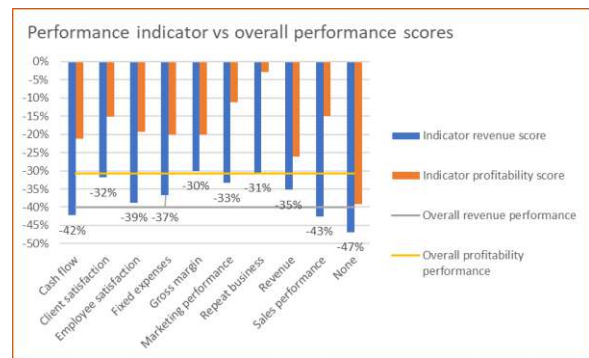


Figure 73 - Performance indicator vs performance score - language companies

The participating language companies are moving to a more finance-based form of performance monitoring, with revenue, gross margin and cash flow as their top three, pushing the old favourite client satisfaction to fourth place. ‘Soft’ indicators such as employee satisfaction, ESG and marketing are getting less attention.

Surprisingly, sales performance scores even lower than in 2024, despite the importance of proper sales management in the current climate.

Last year’s ELIS results showed a possible correlation between monitoring specific indicators such as repeat business and sales performance, and the revenue or profitability performance of the company. This correlation could not be confirmed. For instance, last year’s strong positive correlation between sales performance monitoring and revenue performance has completely disappeared: this indicator now performs even slightly worse than average. Other individual indicators perform better than average this year but did not show an impact last year.

The only clear correlation is that total absence of performance indicator monitoring (the “None” category in the figure above), leads to worse than average results, both for revenue and profitability.

## Outsourcing

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

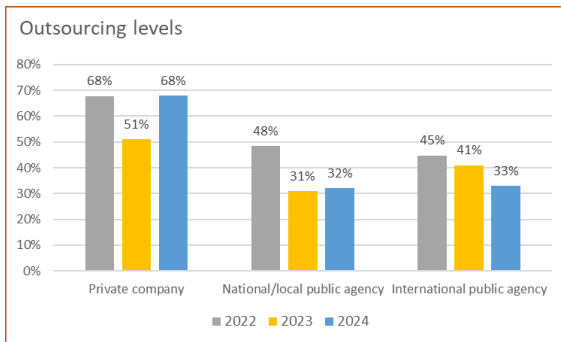


Figure 74 - Outsourcing levels - language departments

2024 outsourcing practices changed differently depending on the type of organisation. Private companies (most of them international ones) are back to 2022 levels, while national public agencies remain at their lower level. International agencies report even lower outsourcing levels than last year, despite the multi-year contracts these institutions are working with..

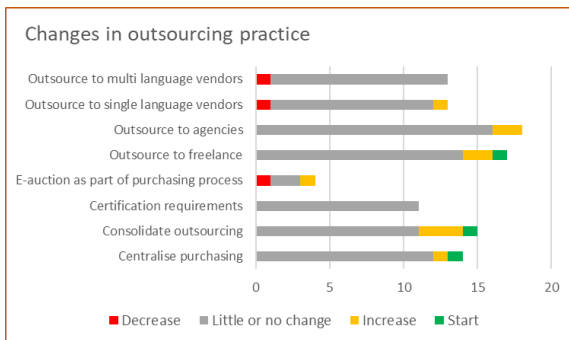


Figure 75 - Changes in outsourcing practice - language departments

The tendency to consolidate outsourcing, which was already visible in the previous ELIS edition, is still present.

Given the small number of answers to this question though, conclusions need to be drawn with care.

There is no clear indication for a change to agency or freelance outsourcing.

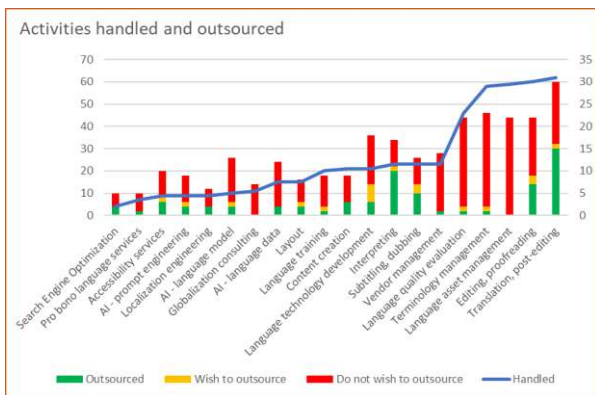


Figure 76 - Outsourcing intentions - language departments

In terms of individual activities, outsourcing behaviour did not change.

Only language execution tasks such as translation, post-editing, interpreting or subtitling are outsourced more than occasionally.

The language department participants that do not wish to outsource their translation or post-editing activities, primarily national public agencies, has even grown from roughly 20% to 50%.

## Language companies

Language companies maintain their current outsourcing practices. Approximately 60% of their business is outsourced.

The amount that is outsourced to independent professionals continued to increase slightly.

The number of language companies that operate a 100% in-house model continued to decrease, from 5% last year to only 3%.

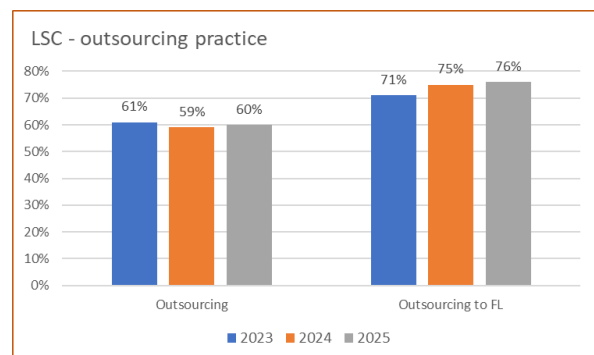


Figure 77 - Language company outsourcing practice

## DEALING WITH TECHNOLOGY

### Technology implementation

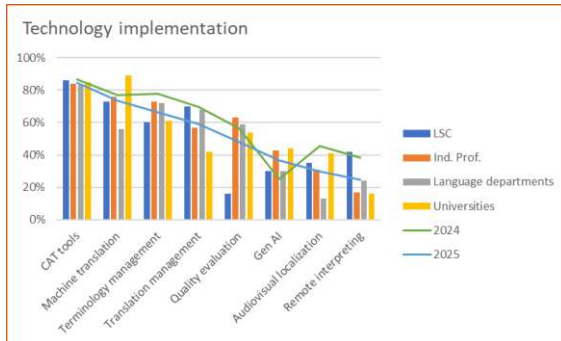


Figure 78 - Technology implementation

Comparison with the ELIS 2024 data shows that technology implementation has not increased except for Generative AI.

Only 16% of language companies indicate that they are using quality evaluation tools, which is even less than the already low 28% in 2024 and far below the 62% reported by independent professionals, who also score higher in Gen AI implementation.

Other striking differences are the considerably lower percentages for audiovisual localisation tools (subtitling etc.) and remote interpreting reported by both universities and language departments.

The lower implementation rates in language companies and public agencies are related to smaller size segments (companies) and a higher ratio of national public agencies. The reason for lower percentages in universities is not linked to the EMT status since non-EMT universities, which generally report lower technology implementation rates (except for distant interpreting) were less well represented in ELIS 2025.

### Machine translation and Generative AI

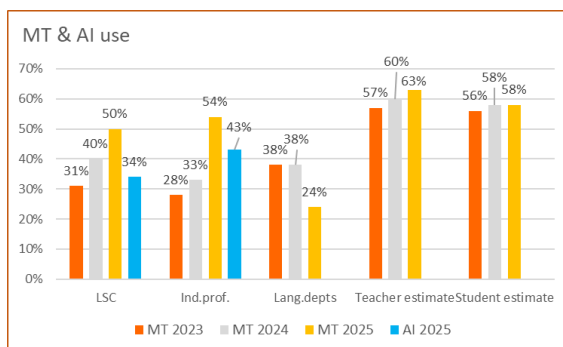


Figure 79 - Actual MT and AI use

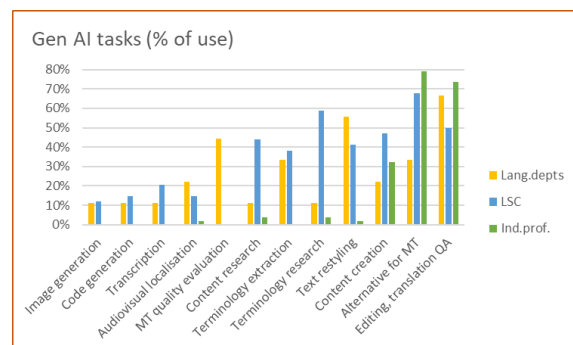


Figure 80 - Generative AI tasks

Even with a stagnating implementation level of MT, its actual use in terms of number of projects has significantly increased, although university staff and students continue to overestimate it.

Generative AI is most often used as an alternative for machine translation (less so among language departments) or for editing and translation quality control. It is also fairly popular for content creation tasks, especially for communication and marketing purposes in language companies.

Research tasks, both for terminology and content, are mainly mentioned by language companies, while participating language departments use it rather extensively to evaluate the quality of raw machine translation output.

## Language companies

Actual MT use by language companies has increased by 1000 BP and reaches now the magic mark of 50% of handled projects. AI makes its entry with an impressive 34%.

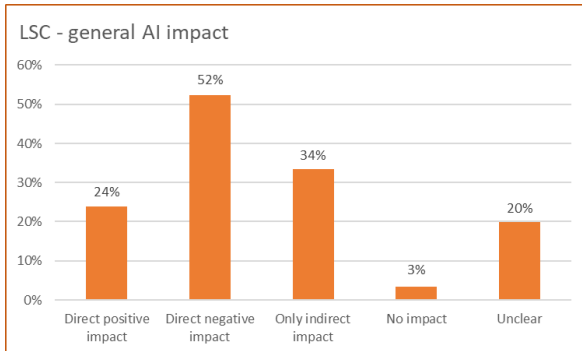


Figure 81 - General AI impact - language companies

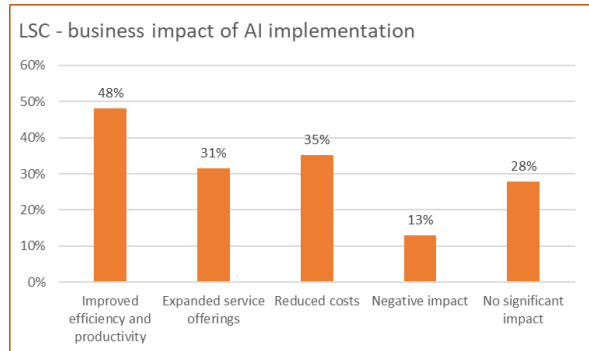


Figure 82 - AI impact after implementation - language companies

In line with the trend remarks, language companies primarily report a direct negative impact of AI on their business, either by clients reducing their outsourcing or as a result of the reduced rates for post-editing.

Up to half of the companies which implement AI themselves report a positive effect, through higher efficiencies, lower costs or additional service offerings. There are, however, still a few that mention a negative impact on their activities. Interestingly, 28% do not see any significant impact after implementation.

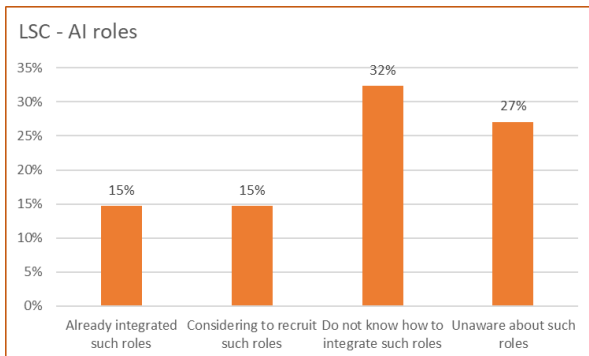


Figure 83 - AI role integration - language companies

Integrating AI-specific roles is clearly work in progress for language companies. Only 15% of them have already done so and another 15% is considering it.

A majority of the participating companies, however, are not aware of the existence of these roles or have no idea how to integrate them in their operations.

## Independent language professionals

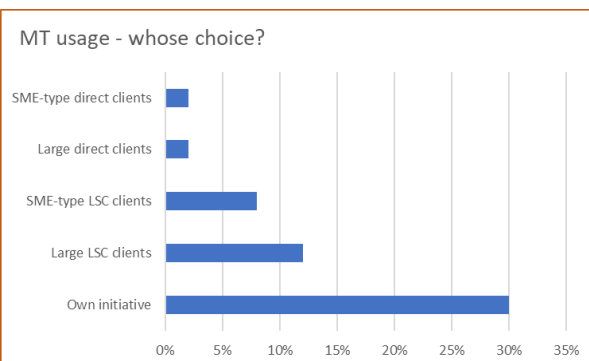


Figure 84 - MT use origin - independent professionals

The percentage of projects that are pre-translated by the client (predominantly language companies) has remained unchanged at 24%. Independent professionals, however, are increasingly using MT on their own initiative.

Both the number of professionals who make this choice (69% vs 58% in 2024) and the number of respondents who use it in 50% or more of their projects (29% vs 16% in 2024) are increasing significantly.

The data show a slight difference in voluntary use between men and women (34% of men and 29% of women) but no significant bias in terms of seniority or age. Part-time professionals, however, score higher than full-time ones.

There is no direct correlation between voluntary use of MT and the overall activity increase or decrease, but those that report a strong increase or a strong decrease of activity are more likely to also report a higher respective lower voluntary use of the technology. This may be, and probably is, an indirect consequence of the professional attitude of the individual rather than the use of MT itself.

### Language departments

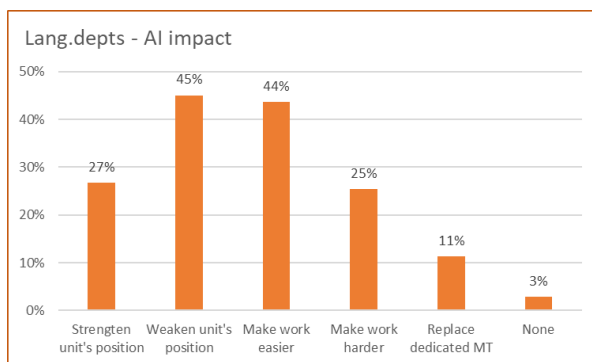


Figure 85 – AI impact - language departments

Although they show a more balanced opinion about AI than the language providers, language departments have similar concerns. Almost half of the respondents are concerned that AI may weaken the position of the department in their organisation.

This is not an unreasonable concern. Firstly, internal clients may be using the technology themselves without turning to the language department.

And secondly, because half of the respondents also reported that their department is not the only language owner in the organisation. A striking difference between the language department answers and those of language providers is the small percentage that report using AI as an alternative for dedicated machine translation, which is probably linked to the use of highly trained dedicated MT engines.

The difference between organisation types is particularly visible in the actual use of machine translation as a percentage of post-editing work vs human translation.

National agencies are using the technology significantly less than their international colleagues and the companies. This difference is even stronger when looking at post-editing in outsourced work, where national agencies report an average of merely 2%, for a total average of 16% outsourced post-editing.

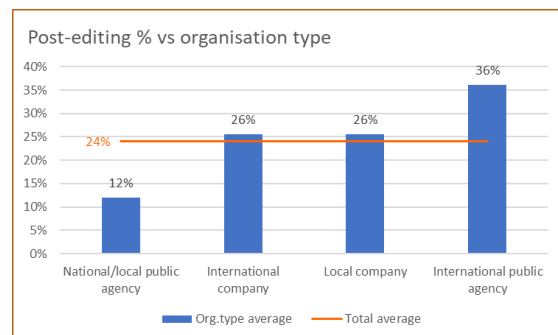


Figure 86 – Post-editing % - language departments

### University staff and students

University staff estimate that MT is currently used in 63% of professional work, which is still an overestimation given the 50% vs 54% results of language companies and independent language professionals, but closer to reality than in previous years. There is no significant difference between answers from EMT and non-EMT universities.

Students are a bit closer to reality with 58%.

According to student answers, machine translation is currently the most widely-used technology in their training programme. It scores even slightly above translation memory.

When asked when MT quality will reach the level of human translation, 42% of students reply that this will never happen, but 47% are not so sure. 38% even thinks that this may happen before 2030, i.e. when they enter the language industry.

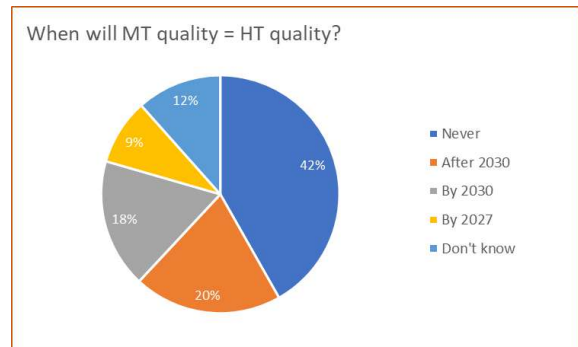


Figure 87 - MT-HT equivalence - students

Student data indicate that the use of Gen AI is already widely spread in translation-related training programmes. 19% of students indicate that they use it regularly in their programme, and 45% report occasional use.

This use of AI, however, remains a hot topic in academia and the opinions are truly mixed. 20 teachers (43% of those who replied to the question) reported that they have formal rules in place to regulate how the technology can and should be used. Another 20 replied that they do not have those. Again, the data show no difference between EMT and non-EMT institutions.

When it comes to participating in AI-related activities, however, such as special interest groups (SIGs), EMT-network universities are clearly more active than non-EMT ones.

## Preferred tools

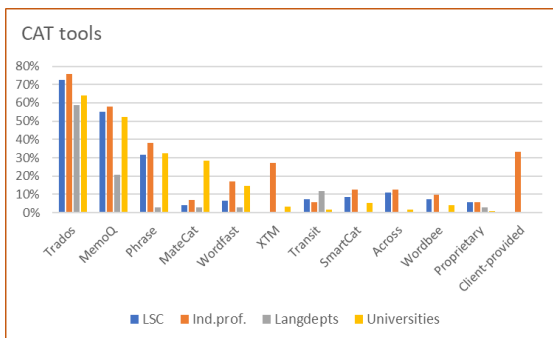


Figure 88 - Preferred tools – translation memory

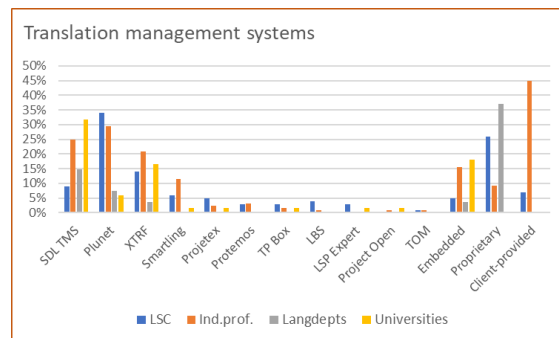


Figure 89 - Preferred tools - translation management

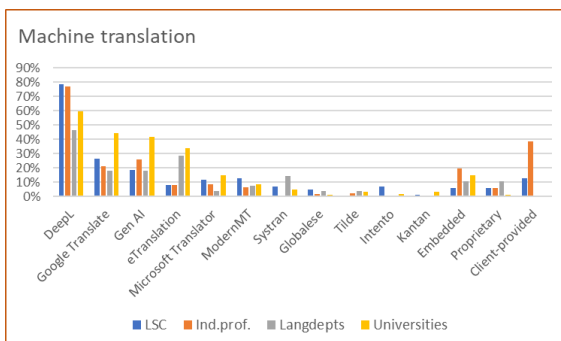


Figure 90 - Preferred tools – machine translation

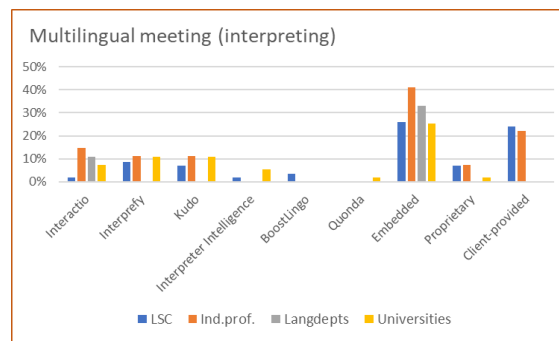


Figure 91 - Preferred tool - remote interpreting

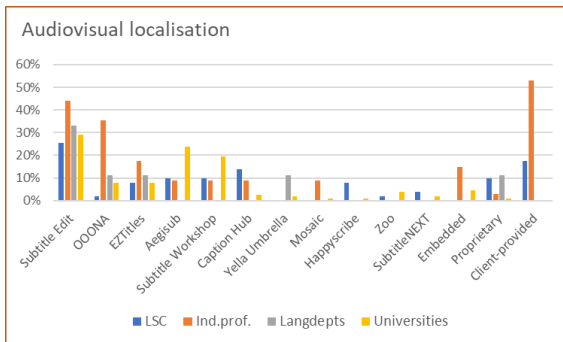


Figure 92 - Preferred tools - audiovisual localization

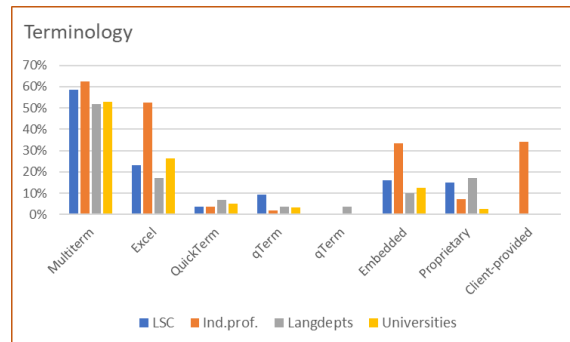


Figure 93 - Preferred tools- terminology management

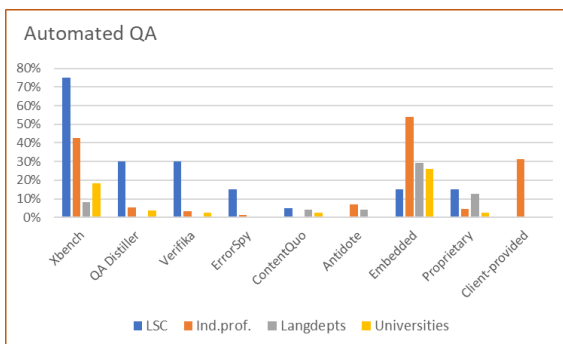


Figure 94 - Preferred tools – automated QA

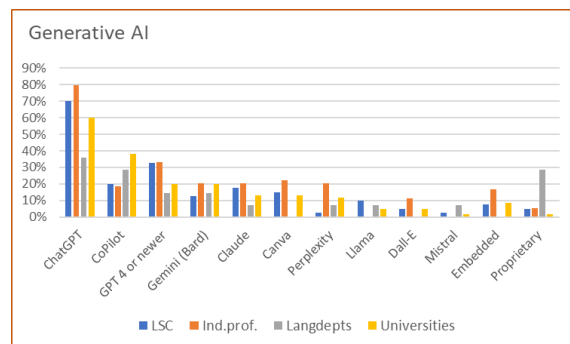


Figure 95 - Preferred tools - generative AI

The above lists show the tools that are mentioned by more than one segment. Some tools, such as the CAT tools OmegaT and Multitrans, or the Nordic MT environment Opus are used by just one segment (in these particular cases the language departments).

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).

The translation management systems landscape continues to be extremely varied, with quite a number of local players defending their ground.

In machine translation we see an interesting shift. While DeepL continues to clearly lead the ranking, Google Translate lost ground and is feeling the hot breath of large language models on its neck.

Dedicated tools for remote interpreting have a difficult time in obtaining a market share due to the multilingual capabilities of online meeting platforms.

Translation management and automated QA are also largely part of complete technology suites, while machine translation and generative AI are typically integrated into but are not part of those suites.

## WORKING IN THE LANGUAGE INDUSTRY

This year's results are a loud wake-up call for the employment situation of the language industry. Both language companies and language departments (with the exception of the international public agencies) report a considerable drop in staffing levels and express little hope that this will be undone in 2025.

At the same time the data indicate that experienced freelance professionals are indeed leaving the industry and that the number of language companies is decreasing.

This is not good news for those who are ready to embark on a career in the language industry and whose ambitions are mainly focused on language roles while the industry is increasingly drawing the technology card.

Note that the ELIS data reflect mainly the text translation part of the market, while language providers focusing on spoken word (interpreting and audiovisual), typically less represented in the ELIS data, performed much better in 2024 according to research by the Swiss market research company Slator.

### Language company staffing structure and recruitment

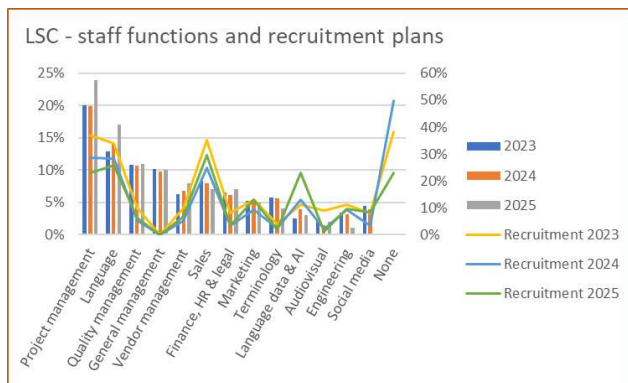


Figure 96 – LSC staffing and recruitment

Language companies have been cutting down on support functions, focusing on the core language and project management roles, and show the same behaviour in their recruitment plans, which are even more modest than last year.

The only non-core exception is AI, where 25% expect recruitment in 2025. ELIS 2026 data will tell us if those plans will actually be carried out. All too often ELIS data have shown the opposite, especially in areas like sales and audiovisual roles.

Participating companies do not report a further return to office, which is also linked to the smaller average company size and the relatively high number of respondents for whom their home is their office.



## Employment quality

### Work-life balance

Participants report similar or slightly lower work-life balance than last year.

One striking evolution is the more than 10% erosion among university staff since 2023.

Unfortunately neither the data regarding challenges nor the free text comments provide an explanation for this evolution.

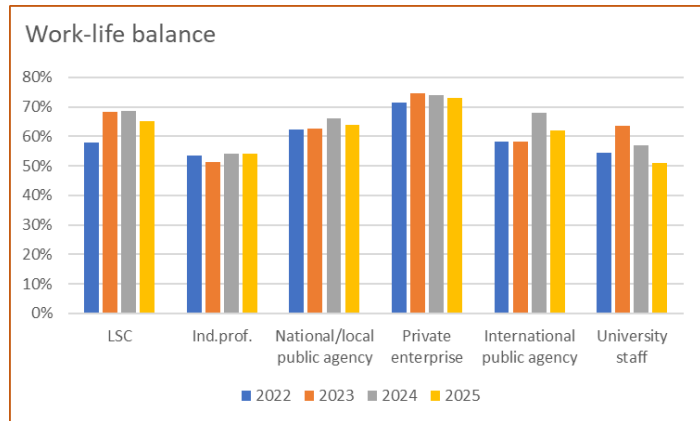


Figure 97 - Work-life balance

### Career satisfaction

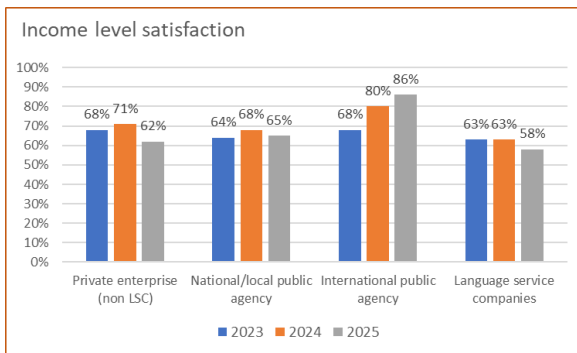


Figure 98 - Career satisfaction – income levels

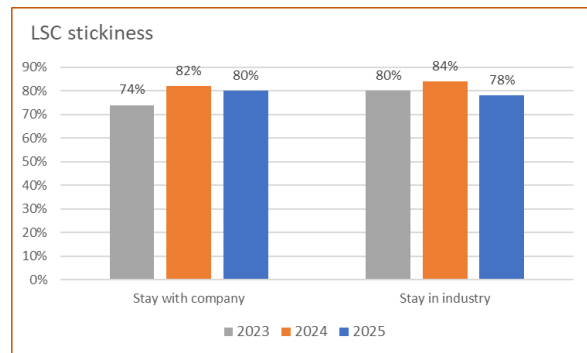


Figure 99 - Industry stickiness - language companies

The rising income satisfaction of the (fewer) participants from international public agencies is in stark contrast to the lower scores from all other respondents, especially those of language companies and other enterprises.

It is important to keep in mind that the vast majority of language company respondents are business owners, who typically pay themselves an income based on their company's results. The slightly lower *stickiness* score expressed by language company employees is in line with the lower satisfaction level.

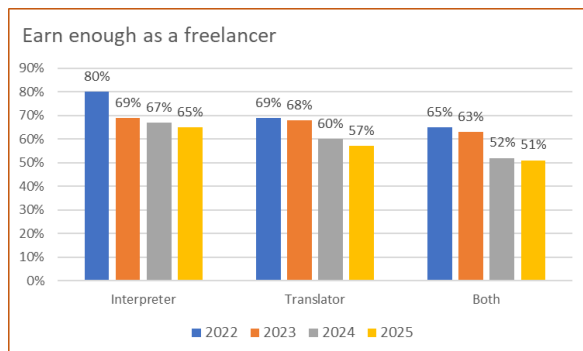


Figure 100 - Earnings independent professionals

Independent professional data unfortunately confirm, in no uncertain terms, lower income satisfaction.

Only 57% report that they earned enough with their freelance activity. Interpreters continue to report better situations than translators and mixed profiles, but are suffering nevertheless, especially taking into account that interpreters are less likely to work part-time.

Despite this further decline the participating independent professionals are maintaining their private insurance and retirement provisions at the same – modest - level.

Insufficiently stable earnings continue to be named as the main reason for not being able to increase this coverage.

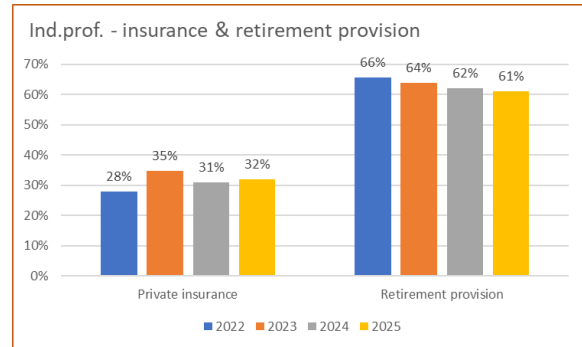


Figure 101 - Private insurance and retirement provisions – independent professionals

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 narrowed due to the lower satisfaction among male participants (59% compared to 64% in 2024), while women scored 56% (57% in 2024).

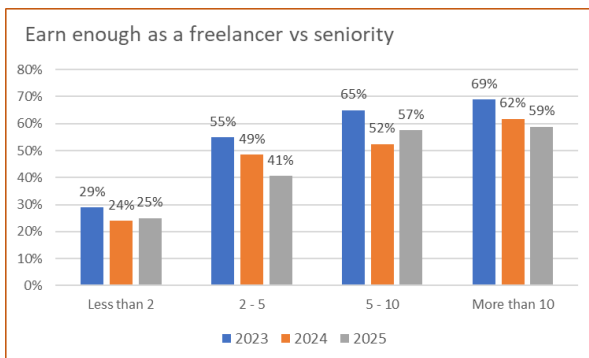


Figure 102 - Finances vs years of activity - independent professionals

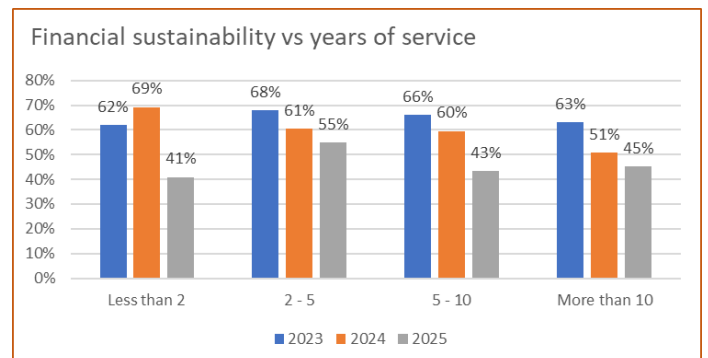


Figure 103 - Sustainable future vs seniority – independent professionals

While the decline in earnings was evenly spread over all seniority classes in 2024, this year’s data paint a mixed picture, with a strong further drop in the segment with 2 to 5 years of experience. Note that this does not reflect actual income levels, but the degree of satisfaction. This segment consists typically of young professionals who are building their career and are often starting a family. A drop in income will hit this segment particularly hard.

In 2024, the most junior segment surprised everyone with the highest confidence in the financial sustainability of their freelance activity. This confidence has completely disappeared. With their confidence level plummeting to 41%, they now even beat the pessimistic view of their more senior colleagues. Note however that junior segment only represents 3% of the independent professional participants.

## Student career preferences

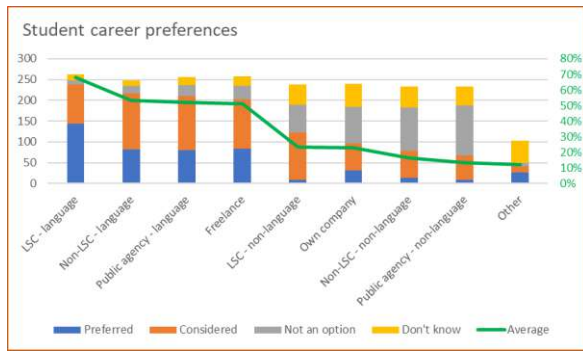


Figure 104 - Student career preferences

Student participants are mainly aiming for a career in a language role (translator, editor, etc.).

They express a preference for a career in a language company, but are also totally open for other companies, public agencies or a freelance career.

Non-language positions such as project management score remarkably lower.

## Training and continuous professional development (CPD)

Training is an important part of all professional settings and all segments of the industry. The time spent on personal development in 2024 varied from 18 hours for national public agencies, to 40 hours among university staff.

Independent professionals reported on average 5 CPD sessions, but two thirds of countries score below that average. Female professionals use CPD clearly more often than men. Age or main role, however, does not make a significant difference.

67% of professionals report that the return on their CPD investment was as expected or better, which is roughly the same level as in previous years.

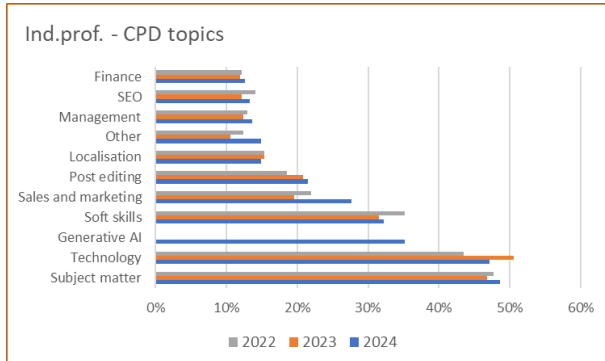


Figure 105 - CPD topics - independent professionals

Among these professionals, 2024 saw a lot of attention on sales and marketing training, next to the obvious AI and other technology topics. Subject matter trainings, however, kept their top ranking with a score just shy of 50%.

In language departments, the top 5 is invariably made up of technology, data security, language topics, soft skills and internal processes (not always in that order).

## Required skills

Aligning training programmes with the skills that are required by the market is the training institutes' main concern. Unfortunately the gaps that ELIS identifies each year between expectations and performance remain very wide, at least when looking at the language company scores.

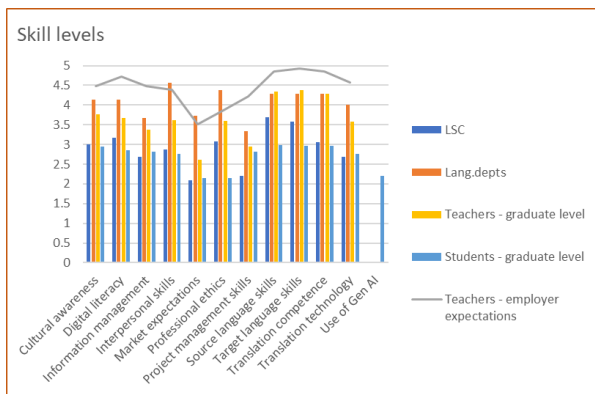


Figure 106 - Skill levels

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 2024.

The strong similarity in ranking between teacher opinions about employer expectations and the actual employer scores remains visible in this year's results.

Language department are much more satisfied about graduate skill levels, in quite a few cases even more so than the teachers themselves. Language companies, on the other hand, remain extremely critical, with the exception of source and target language skills which are considered more than average. Remarkably, student scores are very close to those given by language companies, and are often even lower.

Translation technology, traditionally one of the weakest skills, has moved up a notch but industry knowledge and project management skills are still considered too weak.

## LANGUAGE INDUSTRY TRAINING LANDSCAPE

Besides the issues with skill gaps, training institutes are struggling to cope with ever more stringent budget and staffing restrictions.

To make things worse, the widespread interest in 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.

### Existing training programmes

#### Programme foci

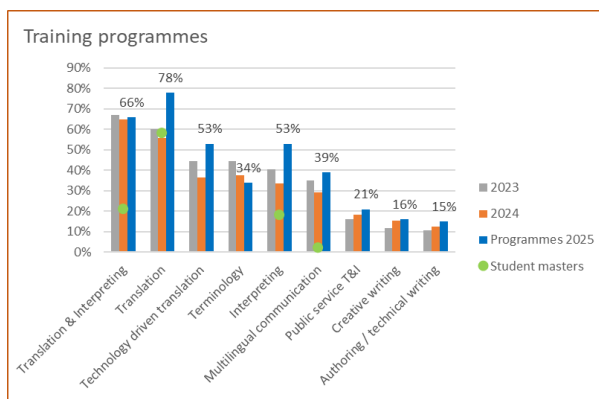


Figure 107 – Training programmes

The often mentioned drop in translation programmes is not visible in ELIS 2025 data, possibly due to a more diverse offering (translation, translation & interpreting, technology-driven translation).

However, the data reveal that it is often difficult to make the difference between a translation programme and a specialisation, especially since these concepts seem to have different meanings for different universities.

The reason for the increase in pure translation and interpreting programmes, while the combined programme remains at the 2024 level, is unclear. Separate terminology programmes continue to lose ground.

Although combined Translation & Interpreting programmes are widely offered, 2025 student interest in a combined Masters is much lower than for the standalone Translation and Interpreting programmes. It is unclear whether this is the result of a real choice or rather of the different meanings of these concepts mentioned above.

Only 5% of the participating Masters students indicated that they are attending one of the other Masters (2% for Multilingual communication and 3% other language-related Masters). This is surprisingly low, especially for the Technology-driven translation Masters, which according to university staff are organised at 53% of their universities.

## Specialisations

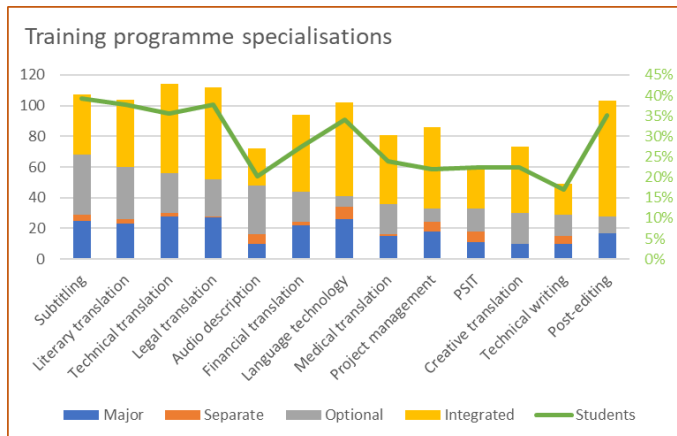


Figure 108 - Training programme specialisations

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 courses and 'Optional' means that students can add non-compulsory domain-specific courses to their programme. The chart is sorted by Major + Separate + Optional.

Subtitling leads the ranking thanks to a large number of programmes that offer it as an optional specialisation. It is also the most popular option among participating students. Overall, popularity follows the same ranking, with a few exceptions: audio description scores lower than expected among students, while language technology, and especially post-editing, score substantially higher than their specialisation status would justify (post-editing is barely offered as a specialisation but usually integrated in the main core of the programmes).

## Languages

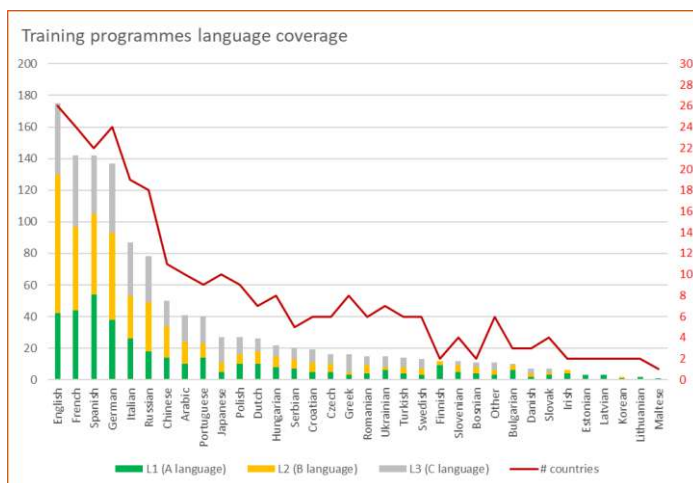


Figure 109 - Training programme languages

The 2025 results do not show any meaningful shifts in language coverage, which is in line with the information about academic evolution (see *Figure 32 - Academic evolution - university staff*) that indicated no major changes in languages covered.

As can be expected, the number of countries (right-hand scale) where a specific language is taught follows roughly the overall language coverage trend.

## Number of students

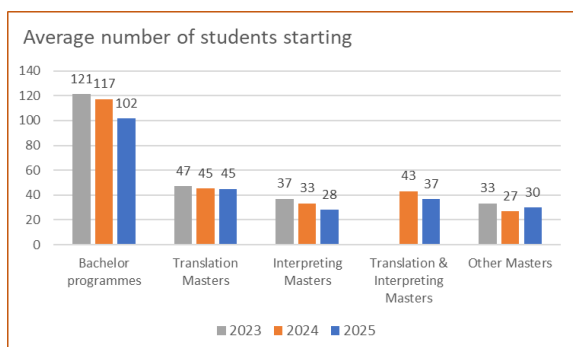


Figure 110 - Average student numbers - university staff

Based on the average student numbers starting a Bachelors or Masters programme, the data confirm the wide-spread opinion that translation and interpreting programmes are becoming less popular.

Bachelors programmes, in particular, saw their average student numbers drop by 13% from 117 to 102. While translation Masters do not report a decrease this year, the data do show one in the interpreting and combined T&I Masters.

## 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.

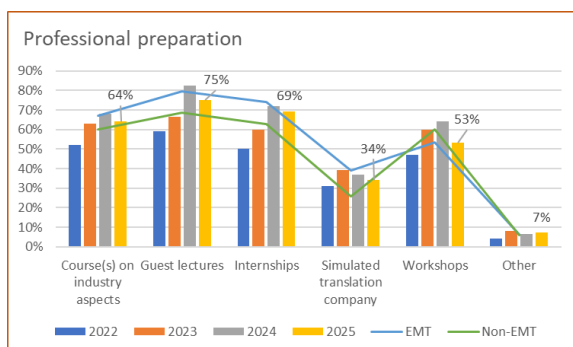


Figure 111 - Professional preparation in training programmes

2025 breaks the trend of growing professionalisation activities in all types of efforts (except the company simulation, which did not grow last year), both in EMT and non-EMT universities.

## Internships

ELIS 2025 gathered specific data to help policy makers, universities and internship partners make internships more effective.

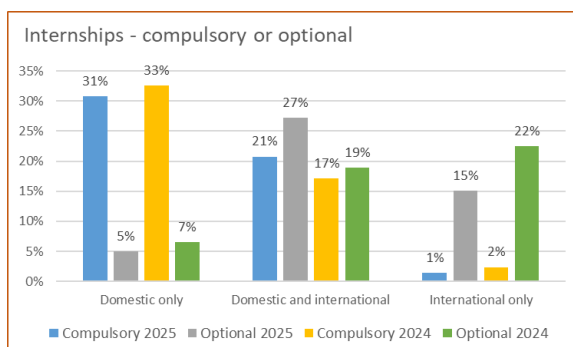


Figure 112 - Internships, compulsory or optional - university staff

According to the participants, the tendency to make internships a compulsory part of the programme does not continue in universities that only organise domestic internships, but is still visible for those that organise both domestic and international internships.

A (shrinking) minority of universities organises only international internships. These are rarely compulsory.

The data do not show any regional preferences for domestic or international, nor for compulsory or optional internships.

There is, however, a significant difference between EMT and non-EMT universities. EMT entities are much more likely to organise both domestic and international internships (57% vs 30% for non-EMT) and non-EMT universities have a slightly higher tendency to make their internships compulsory (59% vs 52% for EMT).

Although internships lost only a few percentage points as a professionalisation activity (69% vs the very high 72% of 2024), the tendency among internship partners shows that the general downturn in the language industry also has an impact on their internship involvement.

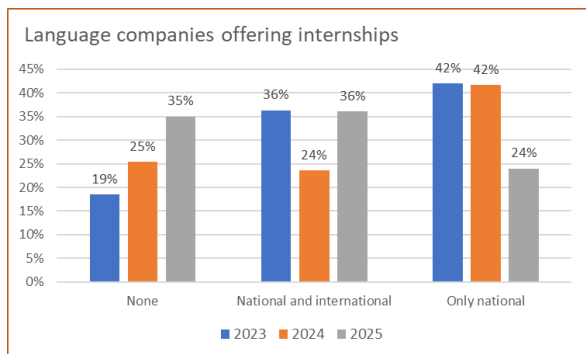


Figure 113 - Internships offered – language companies

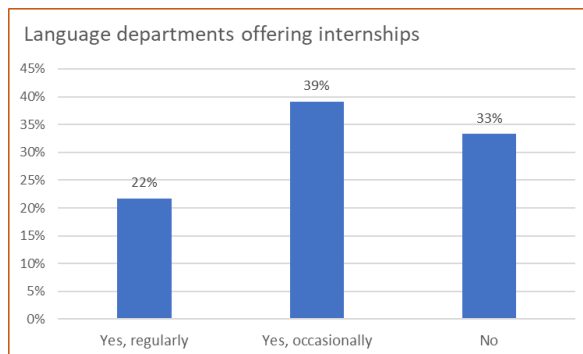


Figure 114 – Internships offered - language departments

The number of language companies not accepting interns increased dramatically from 25% to 35% (62 out of 179). Among those that do accept them, more are likely to accept both national and international interns this year, climbing back to 36% after the drop to 26% in 2024.

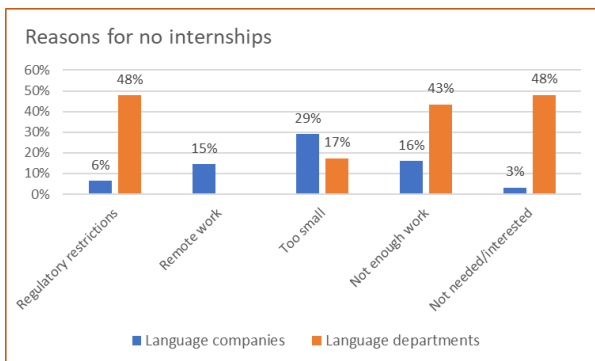


Figure 115 - Why no internships? - language companies

In language companies, the main reason for not accepting interns is still the lack of resources or critical size.

Language departments, on the other hand, often claim that it is difficult due to regulatory (or administrative) restrictions, or simply state that their organisation does not see the added value. A clear correlation between organisation type and specific answers could not be found.

The issue of the lack of suitable work remains on the table. In that respect, respondents often mention that trainees are mainly looking for translation work during their internship, which seems to be a missed opportunity.



An increasing number of language company respondents state that the change to remote work (some add that their physical office has been closed) makes internships impractical or next to impossible.

The attitude towards remote internships is more positive among companies (both LSCs and other companies) than among public agencies. It is not clear whether this is due to a stronger familiarity with remote working and outsourcing of the former, or a higher sensitivity for security matters of the latter.

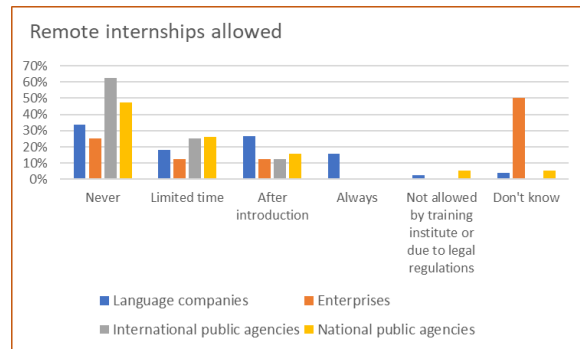


Figure 117 - Remote internships allowed

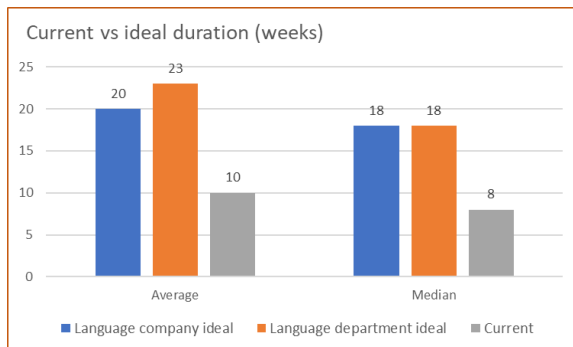


Figure 116 - Internship duration

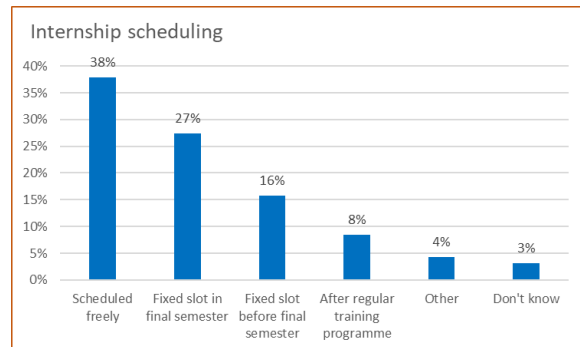


Figure 118 - Internship scheduling - university staff

Although language companies and language departments indicate that the internship's duration is adequate, both would clearly prefer it to be substantially longer, i.e. twice as long.

While a substantial number (38%) of university staff indicate that internships can be scheduled freely, this is certainly not the case everywhere. In certain countries such as Belgium, scheduling seems to be strictly regulated and limited to a fixed slot (7 out of 8 answers). This would explain company comments that internships are not conveniently scheduled. EMT and non-EMT universities report similar scheduling behaviours.

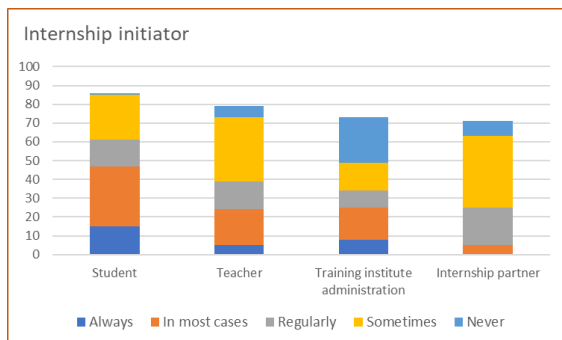


Figure 119 - Internship initiator - university staff

According to university staff, it is most often the student who initiates (and looks for) the internship. This would match the fact that students mark finding a suitable internship as a major challenge.

The data show considerable differences between individual countries, but not between larger regions of Europe like Southern Europe v Northern Europe.

ELIS submitted a number of statements to the participants about which they could express their level of agreement, from Strongly agree (score +2) to Strongly disagree (score -2). While some of the statements were specific for each segment, others showed striking differences in opinion between universities (staff or students) and internship partners (language companies or language departments).

The first, and very indicative difference concerns the existence of formal or structural agreements between universities and their partners.

According to university staff, those are largely in place, while the partners state the contrary. Another topic of disagreement is the level of student monitoring by the university. Teachers and students alike agree that this monitoring is correctly carried out, but the partners do not confirm this opinion.

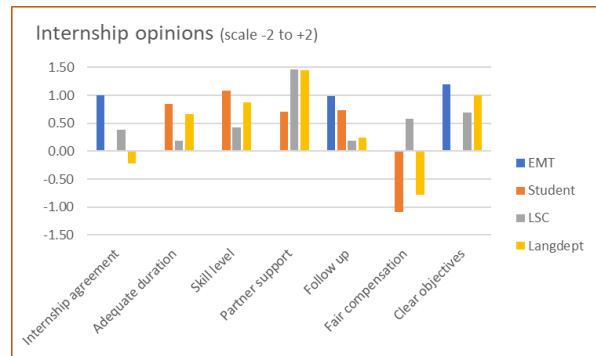


Figure 120 - Internship opinions

Finally, the most striking and also most controversial topic is financial compensation for interns. Students and language departments clearly disagree that such fair compensation exists (certain language departments indicate that payment is not allowed). A number of language companies maintain that they do offer such compensation.

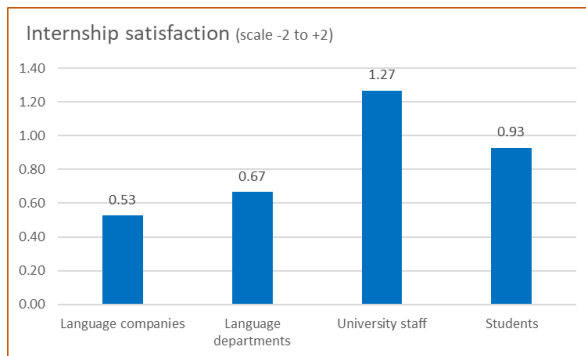


Figure 121 - Internship satisfaction

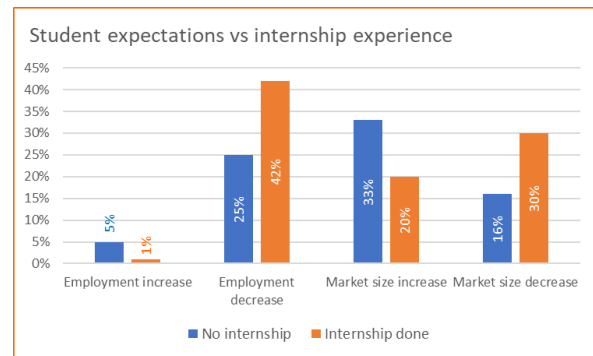


Figure 122 - Internship impact - students

University staff seems to be too optimistic about the level of satisfaction of both the students and internship partners, but none of the participating parties show dissatisfaction with the outcome of internships. Virtually all students give a Satisfied score to their internship experience.

Even more important than the mere level of satisfaction is the impact that an internship has on students' opinions about the language industry. Students with internship experience expressed language market opinions that are much more in line with those of the industry players than students without such experience, which allows them to make more informed decisions about their professional future.

## 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 for 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><math>(\text{Strong increase} * 2 + \text{Increase}) - (\text{Strong decrease} * 2 + \text{Decrease})</math> divided by the number of responses. <i>Don't know</i> answers are not taken into account.</p>
Investment mood	<p><math>[\text{Investment in 2024} * 2 + \text{Investment later} - \text{Disinvestment later} - \text{Disinvestment in 2024} * 2]</math> / 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>

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