



EUROPEAN LANGUAGE INDUSTRY SURVEY 2026

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

ELIS 2026 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 paid particular attention to the reality of post-editing as well as to inclusion practices in language companies and language departments.

1058 participants responded to this year's survey

- 564 independent language professionals (79% female, 20% male)
- 114 language companies (48% female, 49% male – 61% female of non-owners)
- 65 language departments (72% female, 23% male)
- 93 university staff members (71% female, 24% male)
- 223 students (76% female, 18% male)
- 45 countries

Participation was lower than last year, reaching 80% of the 2025 totals. This is comparable to other international language industry surveys which indicate an increased level of survey weariness, in particular among language company owners.

This lower level of participation limits the possibilities to perform meaningful analyses at a more detailed level such as country, gender or company size.

Only five countries reached the threshold for language companies and eleven for independent language professionals.

As each year, users of this report need to keep in mind that the data are not based on objective, verifiable data. 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 language companies and independent language professionals. We can therefore not guarantee that the findings are representative for the global language industry or for specific segments that may be under-represented in the survey. Users should always apply proper judgement when interpreting the findings or when using them in their professional decision-making.

EXECUTIVE SUMMARY

The European language services industry is undergoing a period of profound transformation. For decades, the sector's growth has been built primarily on translation and interpreting services delivered by independent professionals and language service companies. Today, these traditional service models remain central to the industry but are increasingly operating alongside rapidly evolving new technologies.

Across the market, clients are experimenting with new ways of handling multilingual communication. In some cases, organisations are using AI tools internally to produce initial drafts, while language professionals are increasingly asked to review, refine, or adapt machine-generated content rather than produce translations entirely from scratch. As a result, the role of language professionals and language companies is gradually shifting from pure production to a broader spectrum of language-related services.

Language companies and independent professionals are actively responding to these changes. Many are integrating AI and language technologies into their workflows, developing complementary services, or repositioning themselves towards specialised sectors, higher-value communication tasks, or consultancy roles. However, as with any structural shift in a mature industry, the transition is uneven and progressing at different speeds across the market.

This year's ELIS survey reflects this transitional moment. While traditional language services remain widely used, ELIS shows that they are dwindling. What we also know is that their relative share within the broader multilingual communication ecosystem appears to be gradually declining as new models emerge. At the same time, the development and large-scale adoption of new service categories such as AI-enabled language workflows, multilingual content management, language data services, and communication consultancy is still in its early stages and remains difficult to quantify.

This transformation also raises an important methodological challenge. Estimates of the global language industry vary widely, ranging from around €30 billion to more than €70 billion, depending largely on how broadly the industry is defined. These variations illustrate how the boundaries of the sector are expanding and becoming increasingly blurred as language expertise becomes embedded within wider digital and communication services.

ELIS charts the development of the European language services industry as seen and experienced by independent language professionals, SME language service companies, universities, and language departments. These segments remain a vital part of the multilingual economy, and a part of a broader, rapidly evolving landscape.

To ensure that ELIS continues to provide meaningful insights and to actively chart the transformation of the European language industry, it is time for us also to review what ELIS is and how it is conducted – to better capture the full diversity of activities, services, and new business models that now make up the multilingual communication ecosystem.

ELIS 2027 will be the first edition designed around this expanded perspective, aiming to provide a clearer and more comprehensive picture of an industry that is evolving, transforming, and diversifying.

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	19		2 [10]		17	
Argentina	3		3 [10]			
Austria	26	8 [10]	11 [20]	6		1
Belgium	46	4 [10]	8 [20]	7	24	3
Benin	1		1 [10]			
Brazil	2	1 [10]	1 [20]			
Bulgaria	12	2 [5]	7 [10]	1	1	1
Croatia	33		19 [20]	1	9	4
Czechia	9	1 [5]	4 [10]	2	2	
Denmark	10		9 [10]			1
Estonia	15		10 [10]	2	1	2
Finland	42	2 [5]	16 [10]	2	18	4
France	124	12 [10]	76 [20]	5	25	6
Germany	86	11 [10]	48 [20]	7	6	14
Greece	64	2 [5]	42 [10]	3	16	1
Hungary	66	9 [5]	38 [10]	4	15	
Iceland	1					1
Ireland	20		14 [10]	2	1	3
Italy	98	8 [10]	51 [20]	13	26	
Latvia	7		6 [10]	1		
Lithuania	4	1 [5]	1 [10]	2		
Luxembourg	3					3
Malta	3		1 [10]	2		
Moldova	1	1 [5]				
Mexico	1				1	
Netherlands	19	7 [10]	11 [20]			1
North Macedonia	1		1 [10]			
Norway	2		1 [10]			1
Other	1		1 [10]			
Pakistan	1		1 [10]			
Peru	2		1 [10]		1	
Poland	47	6 [5]	18 [10]	8	15	
Portugal	27	5 [5]	7 [10]	4	9	2
Romania	5		4 [10]		1	
Russia	4	2 [10]	2 [20]			
Serbia	5	1 [5]	4 [10]			
Slovak Republic	21	3 [5]	8 [10]	4	6	
Slovenia	19	1 [5]	8 [10]	3	7	
Spain	87	9 [10]	52 [20]	9	13	4
Sweden	17	1 [10]	10 [20]	2	2	2
Switzerland	9		3 [10]		1	5
Turkey	4		3 [10]		1	
Ukraine	3	1 [5]	2 [10]			
United Kingdom	79	14 [10]	56 [20]	2	3	4
United States of Ame	9	2 [10]	3 [20]	1	2	1
	1058	114	564	93	223	64

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 a few approaching or even exceeding the billion euro mark.

How the market is divided between these various types of operators is highly uncertain. Size estimates for the 2025 global language markets vary widely, from 32 billion euro (Slator) to more than 71 billion euro (Nimdzi). Multi-level subcontracting, internal or hidden language activities and blurring boundaries between language technology and language services make it all but impossible to define a clear scope and therefore size of the language industry.

The ELIS survey does not claim to make any estimate of market size, not even at a European scale. Regardless of its scope, which does not include language technology companies, such an estimate would be strongly biased due to the under-representation of the largest language company size segments.

Participant type and size

Language companies

With 564 responses from independent language professionals and 86% 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.

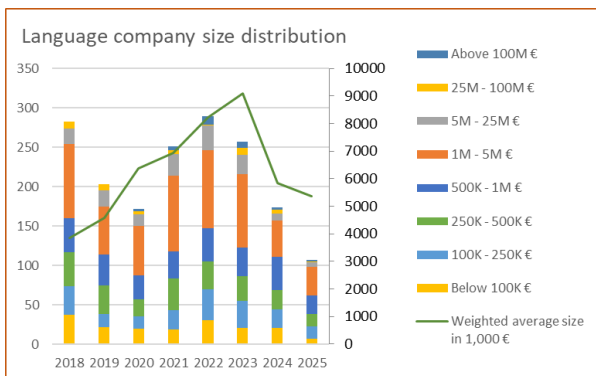


Figure 2 - Language company size

The weighted average company size continues to drop from € 5.9 million to € 5.4 million. This average is inflated by the few companies in the largest categories.

The median value of € 750 thousand gives a more realistic view of the typical ELIS language service company.

ELIS clearly attracts mainly the traditional language service companies.

Almost half of them consider themselves general full-service providers.

Only 16% are domain specialists and even less (11%) report that they have a strong technology focus.

This indicates that the vast majority is trying to hold on to the traditional business model despite the technology-driven disruption that the language industry is going through.

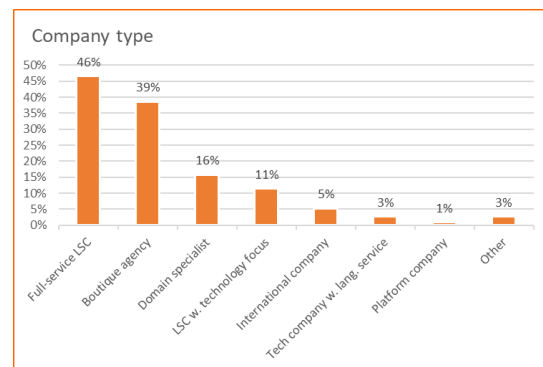


Figure 3 - Language company types

Language departments

Among language departments the participation mix is shifting from public administrations (mainly national and local ones) to companies (mainly the larger ones).

This shift has an impact on the results for a number of topics such as outsourcing and MT/AI use.

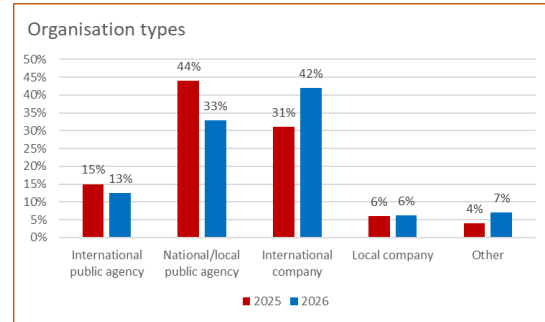


Figure 4 - Language department organisation type

Despite the hints at staff reductions, the average size of participating language units increased again from 82 in 2025 to 110 this year. It is unclear whether this average value is reliable, due to a number of outliers. The median size value is a coarser but more reliable indicator. This median value remains unchanged at 18 staff members.

Training institutes

Of the 137 participating representatives of training institutes, 77% belonged to a university that is member of the EMT network and only 22% to a non-member. This strong bias is expected since the EMT network is one of the ELIS partners. The result is not representative of the actual ratio between EMT-certified and non-certified training institutes in Europe.

With only 9% of the participating students studying at a non-EMT institute, it is obvious that there is still a lot to do to increase the awareness about the ELIS survey in that part of the training landscape. Interestingly, one in four students does not know if their university is EMT-certified.

This lack of visibility of the EMT network label shows even more clearly in the answers from the industry actors: 60% of language companies and 53% of language departments report that they are not aware of the EMT label. Only very few take it into account in their recruitment process.

Independent language professionals

77% of freelance respondents indicate that freelance language work is their full-time activity, which is exactly the same as in 2025.

The ratio between translators, interpreters and mixed activities has slightly changed. An increasing, though still modest, number of independent professionals are focusing on interpreting work rather than translation or a mix of both. While the numbers are still small, the continuous increase (since 2022) does seem to reflect a real shift in the market rather than a temporary statistical glitch.

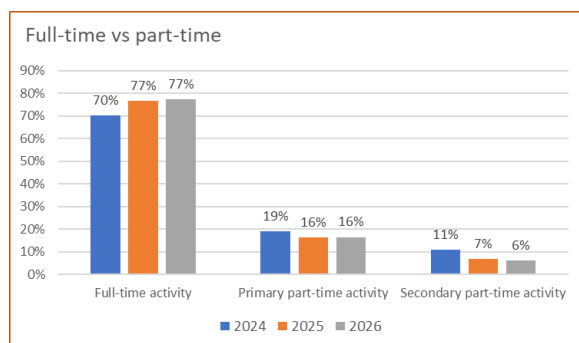


Figure 5 - Full-time vs part-time freelance

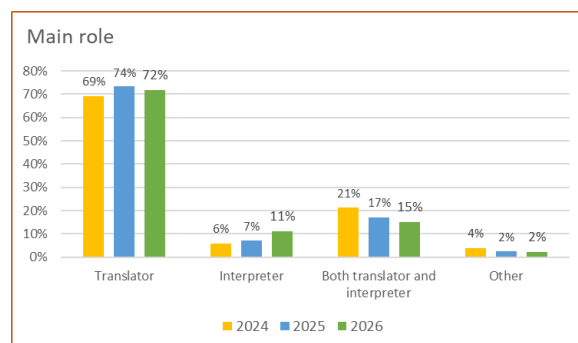


Figure 6 - Main activity of independent professionals

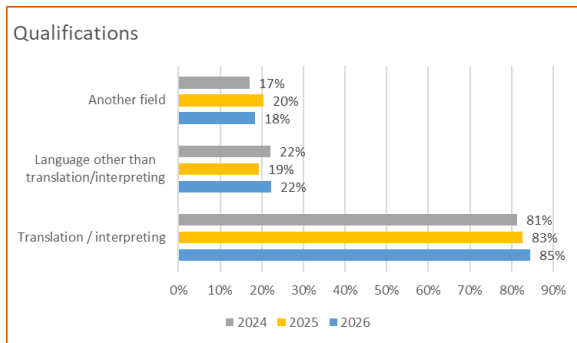


Figure 7 - Independent professional qualifications

85% of participating professionals have a training background as translator or interpreter.

This is slightly higher than in previous years, but the differences are too small to consider it as a real trend.

Gender distribution

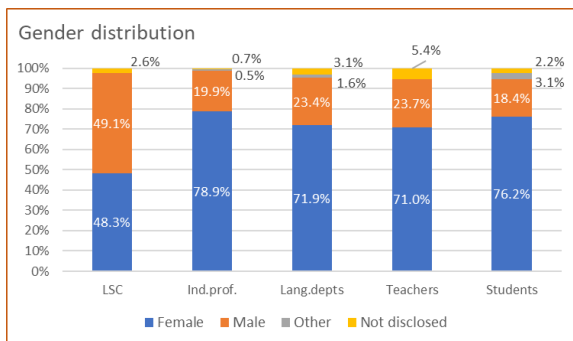


Figure 8 - Gender distribution

Except for language companies, the female dominance in the language industry is striking. Given the 76% among students, this is not likely to change in the future.

Even in language companies, we see a clear female majority of 63% among the non-owner profiles, while the owner/general manager role becomes more masculine.

Women are also strongly represented in language industry top management levels, much more so than in other sectors or in public administrations.

This being said, the demographics of ELIS participants do show a slow but continuous increase of male-owned language companies. Whereas 55% of the 2023 owner participants were women, this dropped to 49% in 2024, 47% in 2025 and this year only 45%.

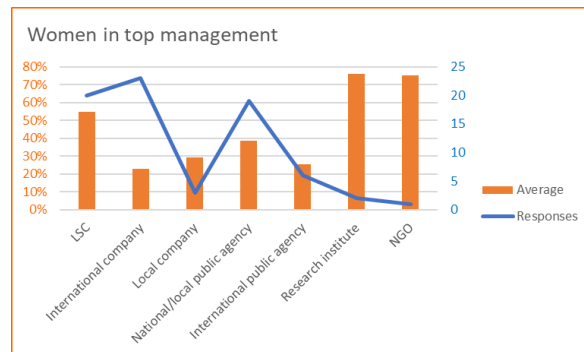


Figure 9 - Women in top management

Seniority

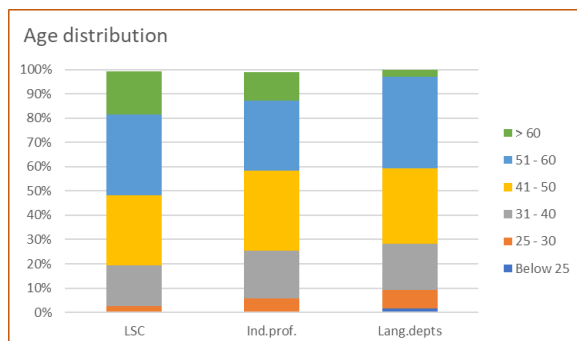


Figure 10 - Age distribution

The language industry is a fairly *old* industry, with an average age in the high forties.

This is very apparent in the language company segment, where the median age remains stable at 55.

18% of LSC respondents are over 60 while the age segment under 30 remains very poorly represented with only 3%.

CERTIFICATION AND INDUSTRY INFORMATION

Certification

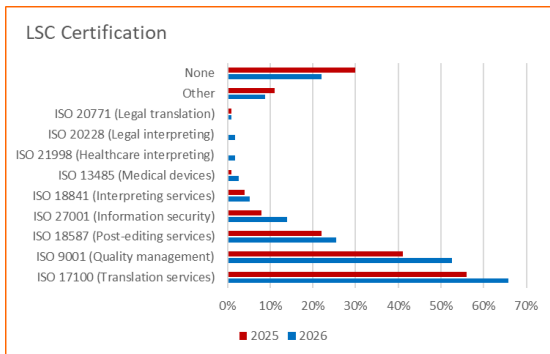


Figure 11 – Certification – language companies

Certification levels of language companies are back on the rise, after several years of slow decline.

Certification efforts are focused on the main standard ISO 17100 and ISO 9001, with ISO 18587 (post-editing) and ISO 27001 (information security) are catching up after a dip in 2025.

The number of language companies that do not report any certification dropped significantly from 30% to 22%.

Language buyers are increasing their focus on the main standards, in particular ISO 17100 (35%).

More than one third do not require any certifications at all.

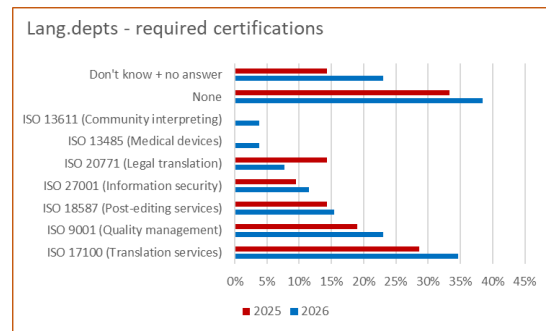


Figure 12 - Language company certification vs size

Industry information

University staff and students information sources

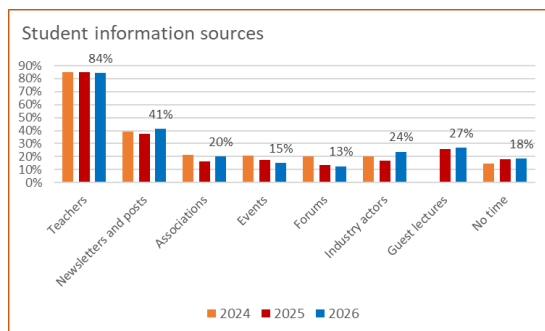


Figure 13 – Student information sources

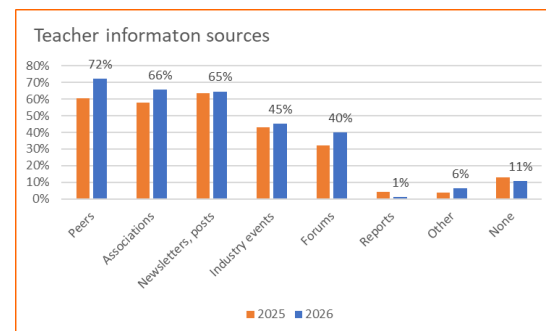


Figure 14 – Teacher information sources

Students continue to rely primarily on their teachers and newsletters. Only one in four gets also information through guest lectures and industry actors. Active involvement in events or forums continues to dwindle.

18% report that they do not gather industry information due to lack of time, which is identical to 2025.

The difference between EMT and non-EMT students is more nuanced than in 2025, with a somewhat higher interest in industry newsletters and associations by non-EMT students, but a

slightly stronger contact with industry actors (either directly or through events) by their EMT colleagues.

Information availability for teachers and students

Students are slightly more satisfied with information availability but according to university staff the availability of market information, including industry expectations and legal information, remains largely limited.

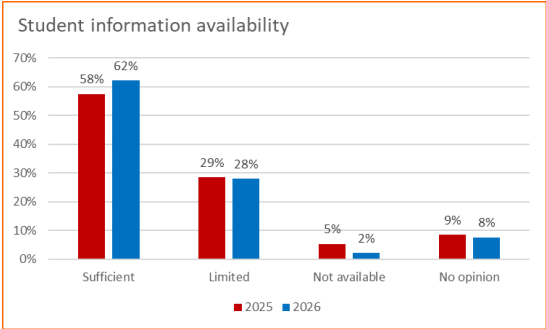


Figure 15 – Student information availability

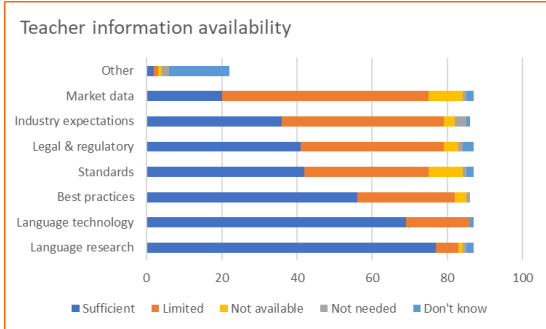


Figure 16 – Teacher information availability

SLOPE IS STEEPENING FOR TRADITIONAL LANGUAGE SERVICES

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

ELIS 2026 market results contradict the (modest) growth predictions of third-party market research, which are mainly driven by large language providers and AI-driven capital investments in activities other than the traditional language services.

The traditional and smaller language companies and independent professionals which make up the bulk of the ELIS audience are struggling to react to the changing business environment.

IMPORTANT: *the figures in the industry evolution charts below do not represent an actual increase or decrease. They reflect the difference between respondents reporting an increase and those reporting a decrease. The evolution is expressed as a percentage, based on a weighted scale of -2 to +2 (between strong decrease and strong increase).*

Market performance

Market activity

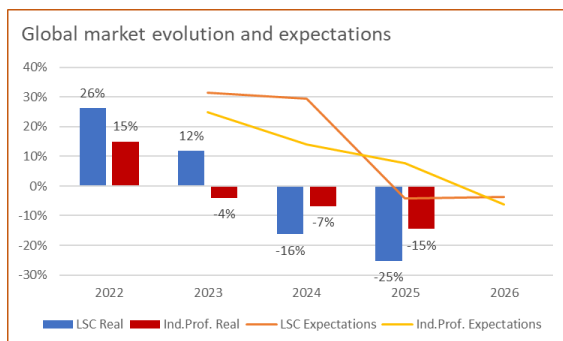


Figure 17 – Market activity expectations

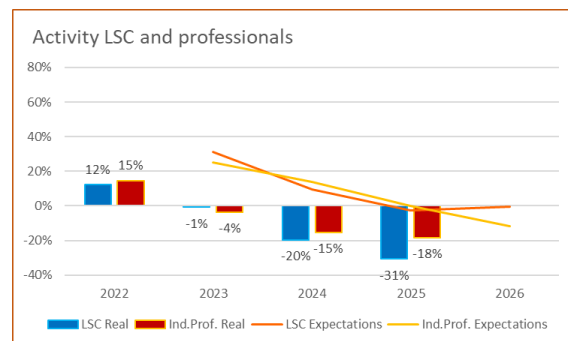


Figure 18 – Activity evolution

Language companies and independent professionals are reporting even worse activity scores than in 2025 and do not see any signs of improvement for this year.

They extend this view to the global language market and language companies are even more pessimistic about their own local markets.

Language departments and teachers are less pessimistic. They still see growth possibilities for the global market.

The difference between language provider and language department outlook may reside in what both parties understand under language industry. While the language provider participants, in particular language professionals, are focusing on the services aspect, language departments may also include aspects of language technology and AI-related services that the participating providers are offering only to a lesser extent.

Pricing and profitability

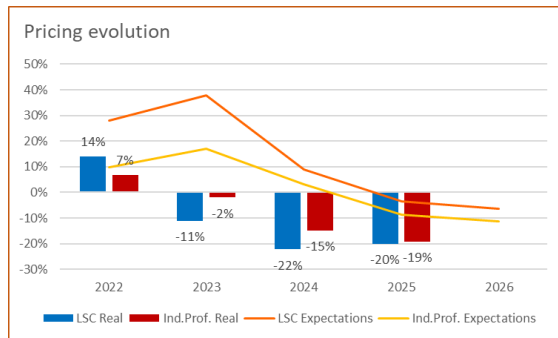


Figure 19 - Pricing evolution

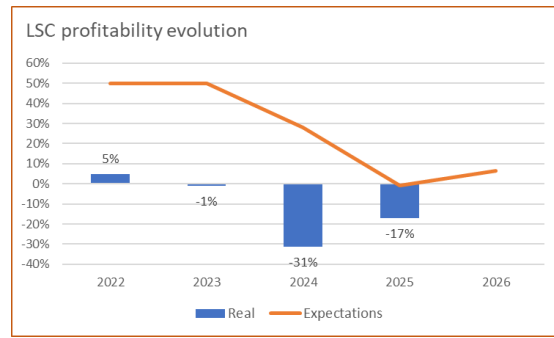


Figure 20 - LSC profitability evolution

In terms of pricing, all segments (including language departments and teachers) agree: market rates did go further down in 2025 and are not likely to increase in 2026. Interestingly though, one in four independent professionals indicated that they increased their prices in 2025, while only 12% reported the opposite. 63% have not changed their rates.

The reported drop in language company profitability is not as severe as in 2024 and expectations are that it may stabilise in 2024. The drop is not confirmed by the reported gross margins, which remained stable or even improved at 45% for translation and 21% for interpreting.

Investment

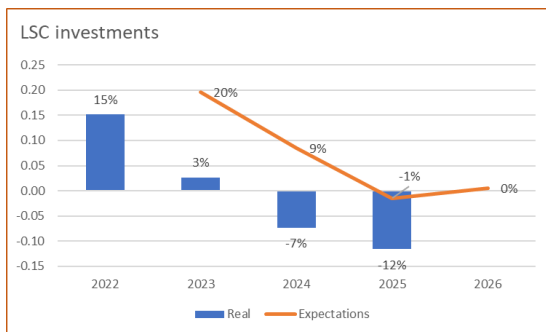


Figure 21 - Language company investments

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

LSC investment levels dropped further below zero. No less than 48% of the respondents report a decrease or strong decrease in 2025, while only 28% increased their investments.

Fortunately, companies cannot continue to decrease their investment levels. The expectations therefore point to a status quo in 2026.

Operational indicators

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

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

Language companies

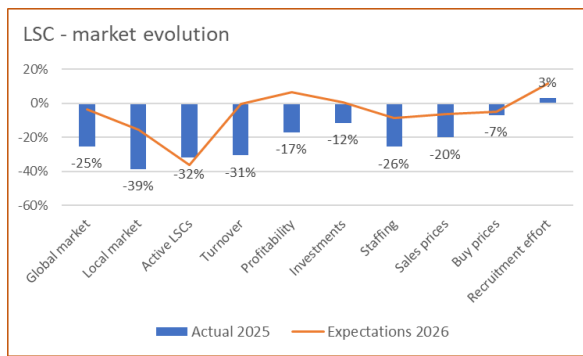


Figure 22 - Market evolution - language companies

60 participants, more than 50%, saw the number of language companies in their market decrease, which confirms last year's expectations. Only 2 saw an increase.

Language companies reported not only a drop in sales prices but also in buy-in rates, which is in line with the information obtained from independent professionals.

Expectations for 2026 are still negative, but closer to a status quo.

62% report a decline of their local market, which is serious since domestic business remains the cornerstone of most small language companies.

Contrary to last year, female respondents are more pessimistic than their male colleagues. This difference exists for all parameters.

Country-specific performance differences

The table below shows the country-specific language company performance results. These confirm the strong geographic differences that previous ELIS editions revealed.

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

	Global market	Local market	Active LSCs	Turnover	Profitability	Investments	Staffing	Sales prices	Buy prices	Recruitment effort
Austria	-21%	-44%	-19%	-38%	-13%	0%	-19%	-19%	-19%	0%
Belgium	-63%	-100%	-67%	-25%	-38%	0%	-13%	0%	25%	0%
Bulgaria	0%	0%	0%	0%	-25%	-50%	-25%	0%	25%	-25%
Czechia	0%	0%	-50%	0%	50%	50%	0%	0%	-50%	50%
Finland	-50%	-25%	0%	-25%	0%	0%	-50%	-25%	-25%	-25%
France	-41%	-54%	-35%	-46%	-33%	-8%	-21%	-21%	-13%	-8%
Germany	-30%	-15%	-39%	-14%	0%	-27%	-41%	-18%	0%	-5%
Greece	0%	0%	0%	-25%	-25%	0%	-25%	-25%	0%	25%
Hungary	-6%	-28%	-22%	-28%	-17%	-22%	-17%	-22%	-6%	-22%
Italy	-19%	-38%	-36%	-63%	-25%	-36%	-25%	-19%	-25%	13%
Lithuania	-100%	-100%	0%	-100%	-100%	-50%	-50%	0%	50%	50%
Moldova	-100%	-100%	-50%	-50%	-50%	-50%	-50%	-50%	-50%	-50%
Netherlands	-43%	-57%	-43%	-57%	-36%	-7%	-43%	-21%	-7%	0%
Poland	-42%	-33%	-30%	-25%	-17%	-8%	-40%	-33%	-8%	0%
Portugal	-30%	-30%	-40%	-50%	-40%	-30%	-30%	-30%	0%	10%
Serbia	-50%	-50%	0%	0%	-50%	0%	0%	0%	0%	50%
Slovak Republic	-25%	-50%	-25%	17%	-17%	-50%	-33%	17%	0%	-17%
Slovenia	50%	50%	-50%	-50%	-50%	50%	-50%	-50%	50%	50%
Spain	-22%	-33%	-44%	-22%	22%	19%	-11%	-31%	-11%	21%
Sweden	-100%	-100%	-100%	-50%	-100%	50%	-100%	-100%	-100%	0%
Ukraine	-100%	-100%	0%	-50%	-50%	-50%	-50%	-50%	-50%	0%
United Kingdom	-5%	-22%	-23%	-14%	7%	-4%	-11%	-15%	0%	23%

Figure 23 - 2025 performance per country - language companies

Independent language professionals



Figure 24 - All market indicators - independent professionals

This year's chart shows almost exactly the same picture as in 2025, with the exception that the results now indicate a real drop in the number of language providers, which was not yet visible in the 2024 actuals. This drop is expected to deepen in 2026.

Despite this drop in the number of providers, a majority of respondents continues to expect competition to increase.

This 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 do not report strong changes in 2025, except for a continued increase in data security requirements and technology integration.

Expectations follow a similar trend; including a noticeable drop in the number of language professionals, language budget and outsourcing rates.

Increasing workload and staff cuts, though both still modest, remain a constant concern.

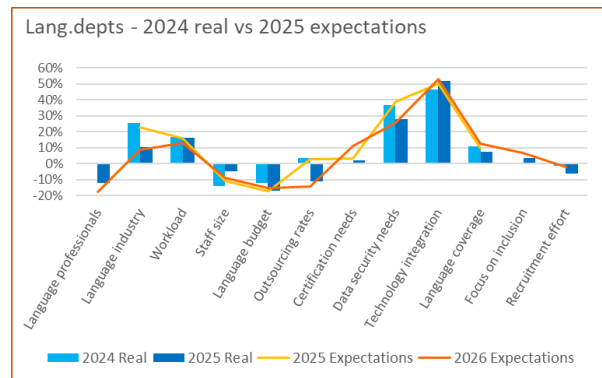


Figure 25 - All market indicators - language departments

Concerns about lower language coverage are contradicted by 2025 actuals, 2026 expectations and reported language numbers.

It has to be noted, however, that changes in the organisation mix can have a significant impact on the language coverage figures since local organisations typically cover many fewer languages than international ones.

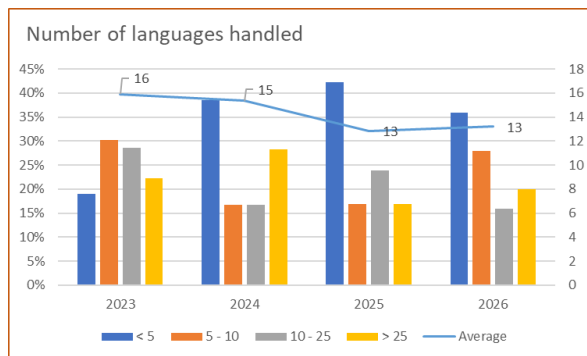


Figure 26 - Lang.depts - number of languages handled

University staff and students

Student market size expectations are closer to those of language providers (language companies and professionals) than of teachers or language departments. Their employment expectations are also in line with the employer's indications about staffing.

Internships certainly play a role in this alignment.

Students agree with teachers that specialisation will continue to increase, but are less optimistic with regards to the variety of job profiles.

Students expect a (modest) drop in the number of language companies, but continue to believe that the number of freelancers is increasing.

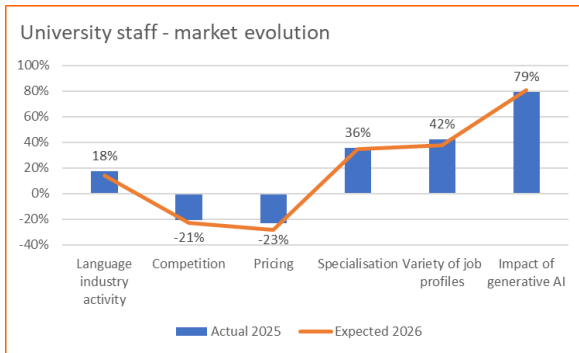


Figure 27 - Industry indicators - university staff

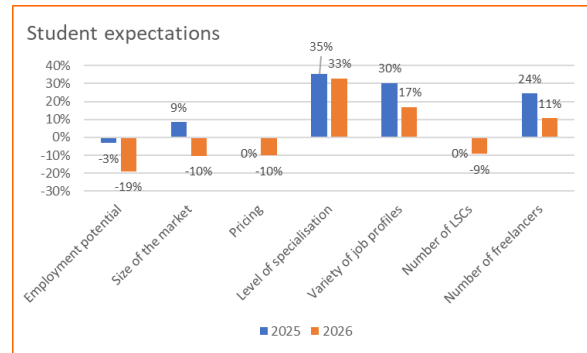


Figure 28 - Industry indicators - students

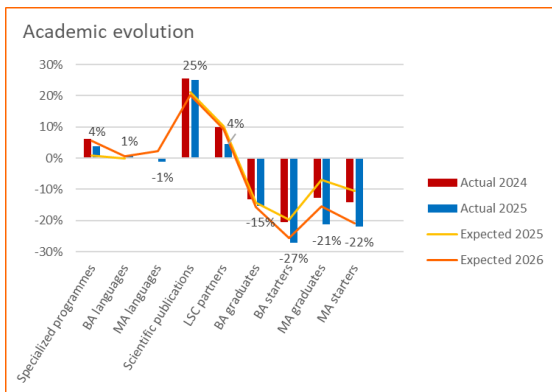


Figure 29 - Academic evolution - university staff

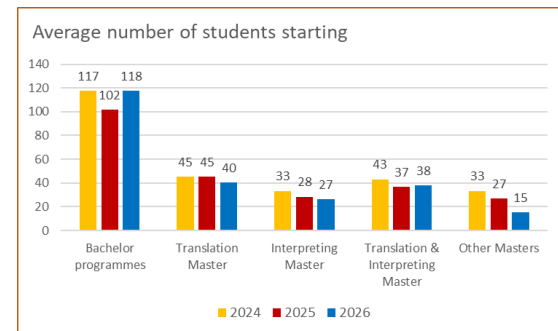


Figure 30 - Average number of students starting

University staff members do not expect any major changes in specialisations or language coverage.

The number of scientific publications continues to increase, which puts additional pressure on actual teaching time.

The general fear that less students are opting for a translation-related training programme is clearly present in the academic evolution data.

The average starting student numbers confirm this decline for the different Master programmes but not for the bachelor programmes, which are back to the same level as 2024.

Caution: Only 8 respondents provided answers to the questions about student numbers. These averages are therefore uncertain.

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	2026
Austria	6	6	3	0.67	1.30	0.70	0.30	0.89	1.50	0.50	1.75	0.50
Belgium	4	2	3	0.62	0.57	0.80	0.70	0.92	0.43	0.50	0.20	-0.25
Bulgaria	2	0	0									0.00
France	9	8	2	1.1	0.53	0.7	0.00	0.00	0.82	0.82	0.58	0.67
Germany	11	8	5	0.80	0.89	1.60	0.40	0.88	0.75	1.08	0.25	0.27
Greece	2	0	2	0.70	1.20	0.70	1.00	0.50	1.43	1.20	3.00	-1.00
Hungary	8	0	3	1.00	0.88	0.70	0.00	0.67	0.62	0.78	0.30	-0.38
Italy	4	3	2	0.91	0.76	1.30	1.00	0.47	0.29	0.58	0.44	0.25
Netherlands	4	9	3	1.27	1.42	1.00	0.90	0.75	1.00	0.29	0.80	1.50
Poland	4	6	0	1.00	0.80	0.40	0.00	0.70	1.50	0.89	-0.20	1.50
Portugal	5	6	0	0.92	1.18	1.00	0.70	0.44	-0.50	0.70	-0.13	1.20
Slovak Republic	3	4	0	0.60	0.67	1.00	1.00	1.00	1.75	0.67	0.75	1.33
Spain	6	5	4	0.76	0.56	0.70	0.10	0.47	0.50	0.27	1.06	0.17
United Kingdom	11	3	0	0.53	1.10	0.80	0.80	0.74	0.60	0.87	0.62	0.27
Country average				0.84	0.91	0.88	0.53	0.84	0.82	0.70	0.72	0.43
Weighted average				0.85	0.89	0.89	0.57	0.77	0.88	0.66	0.61	0.37

Figure 31 - 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. ELIS 2026 hits another historic low, both in standard country average and in weighted average taking into account the number of answers from each individual country.

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

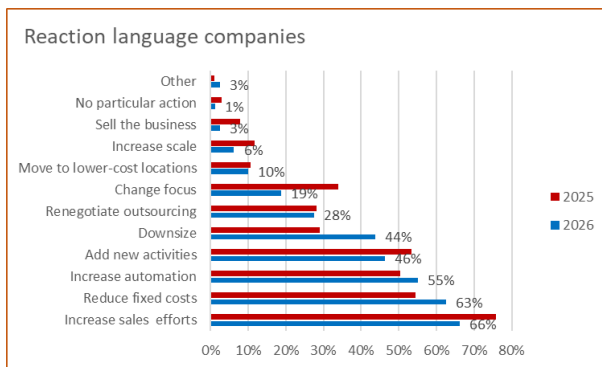


Figure 32 - Reaction language companies

The sluggish investment mood is also visible in the language company reactions to the 2025 downturn.

While these reactions are still primarily aimed at damage control through increased sales and marketing efforts and cost reductions, 46% of the participants indicate that their company is developing new activities.

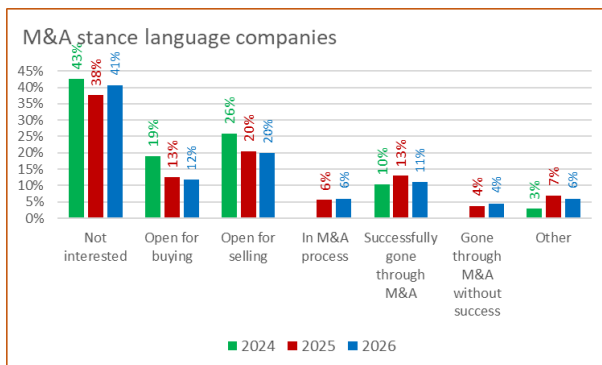


Figure 33 - M&A stance - language companies

The M&A stance of language companies has not dramatically changed compared to previous years.

It is important to note that M&A activity is not reserved to mid-sized and large companies. Several language companies below € 1 million in revenue report having gone through an M&A process or are currently involved in one.

The readiness to buy is fading, which is in line with the deteriorating investment mood.

Independent professional sentiment

The professional sentiment of independent language professionals is intimately linked to their financial situation.

Given the continuous decline of the various financial parameters, it is hardly surprising that the sentiments expressed by freelance participants are increasingly alarming.

The overall opinion that freelancing is a viable, long-term option, which dropped below the 50% mark in 2025, continued its downward trend this year.

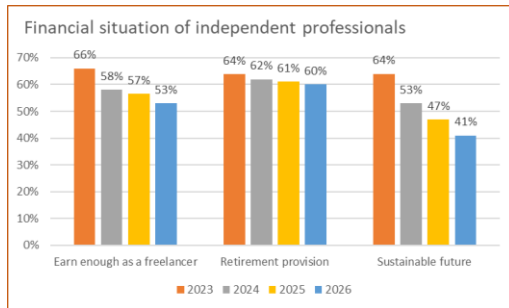


Figure 34 - Freelancing as a sustainable activity

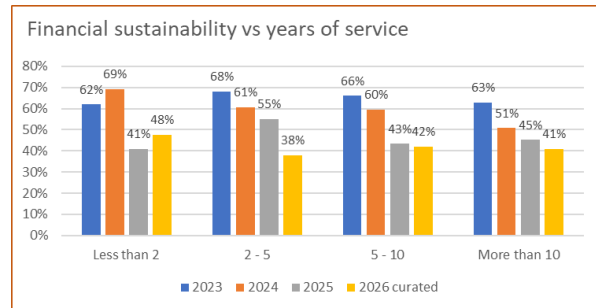


Figure 35 - Freelancing as a sustainable activity vs seniority

Only 22% of the participants responded with a confident *Yes* to the sustainable future question. The curated 41% in the chart takes into account a proportionate part of the *Don't know* answers, an answer option that was not available in the 2024 and 2025 editions.

The loss in confidence is visible in all seniority classes, but is strongest in the two to five years of service category. This is alarming since this is the moment where independent professionals should see their career take off.

The free text comments reveal existential fear for the future. Participants mentioning an income drop of more than 50% and questioning how to pay their bills are no exception. Even more worrying is the lack of comments that speak of hope for improvement.

But there is more. Beyond the mere financial impact of the current disruption, independent professionals perceive a gradual devaluation of their professional value. Replacement of human translation by post-editing, increasing time pressure, less personal contact due to the use of automated workflow systems, rigid conditions in particular in their relations with large language companies. It all contributes to deep frustration about a degrading work environment.

It is therefore no surprise that 17% of the independent professionals are considering ending their freelance activity, a number that is similar to last year.

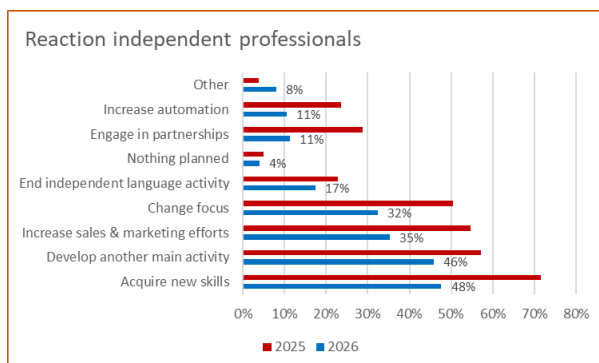


Figure 36 - Reaction independent professionals

On the other hand, almost one in two are acquiring new skills or developing another main activity to cope with decreasing activity.

This indicates that many professionals are ready to defend their position, but we cannot deny that the apparent tendency to act is considerably lower than last year.

It is unclear whether this means that people are losing their drive or that they are now more focused and are choosing a specific way forward rather than keeping all options open.

TRENDS AND CHALLENGES

Trends

The questions about language industry trends have all but lost their purpose since the disruption by language technology (now conveniently bundled under the name AI) on the traditional language services landscape eclipses all other topics.

While language companies and language departments continue to appreciate its positive sides, the impact of language technology is considered predominantly as a negative trend across all segments, mainly due to the resulting decline of traditional human translation work and the erosion of the language professional's value.

Competition and price pressure remain visible as a negative trend, but are seen as a direct consequence of the technology trend. The shift from unfair competition to technology disruption as the main culprit has been swift and dramatic.

The sentiment is most clearly visible among the independent professionals, where more than 50% of respondents could not think of any positive trend. 17% even explicitly confirmed that there were none.

Besides the technology disruption trend, there are segment-specific trends. 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

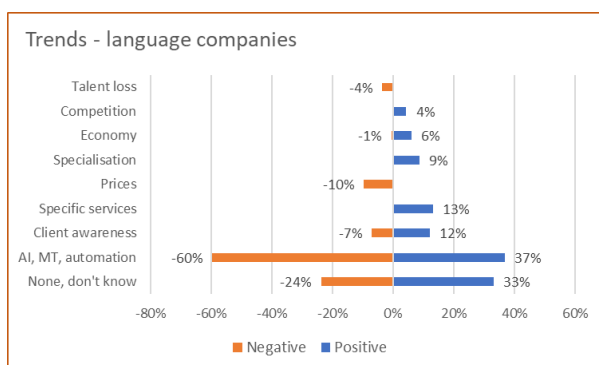


Figure 37 – Trends opinions - language companies

Among language companies, the AI/MT trend has become even more dominant than last year, both as a (growing) positive and an overwhelming negative trend.

The way that the positive trend comments are formulated reveals a growing sophistication in the way that language companies are integrating the new technologies into their service offering.

This is reassuring and contradicts somewhat the conservative reactions to the disappointing business evolution in 2025 (cf. Figure 32).

Price pressure remains a concern, in particular in conjunction with indiscriminate use of AI, but participants also see signs for renewed client awareness and appreciation for more complex expert-in-the-loop work.

Several participants mention specialisation as a prerequisite for success.

As in 2025, competition has disappeared as a negative trend and appears as a modest positive trend due to consolidation and closure of less resilient providers. The price pressure trend however indicates that competition remains strong.

Independent language professionals

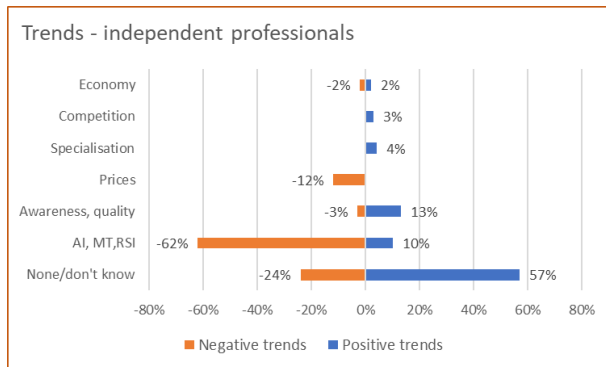


Figure 38 - Trend opinions - independent professionals

For independent language professionals the trend landscape has not changed much compared to last year.

The negative technology trend continues to dominate opinions, though a slightly higher number of participants (13%) is expecting (or hoping for) the AI bubble to burst, restoring client appreciation for language professionals.

Contrary to the language companies, where 37% of the participants also saw positive elements in the AI/MT trend, only 10% of the independent professionals see any positive effect on their activity, either as a tool or as a potential new source of business.

Among the positive trends, 4% see an increased need for specialisation and 3% expect less competition due to language professionals leaving the industry. Both are similar to last year's expectations.

While 24% of the participants did not mention any negative trend (mostly by leaving the answer blank), only 11 made this explicit in their comments.

Although this is just a very small minority, closer analysis reveals an interesting pattern.

Eight of these eleven reported a high level of specialisation, with more than 50% of their activity originating from a single client sector (ranging from literature to finance), and 7 are each focusing on a specific though different client type.

Previous editions showed a general correlation between specialisation and business evolution. This new pattern confirms this correlation from a different angle. High levels of specialisation are a way to carve out a niche where professionals can defend their activity against the adverse effects of today's developments.

Language departments

Language department participants show a remarkably balanced opinion about AI-driven disruption, with half of the participants praising the merits of AI, mainly for its effects on productivity and the way it allows them to handle increasing workloads within a harsh budget and staffing environment.

At the same time, though, they recognise the negative impact of the technology and criticise the tendency to use AI for all possible tasks, including those for which it is not particularly suited.

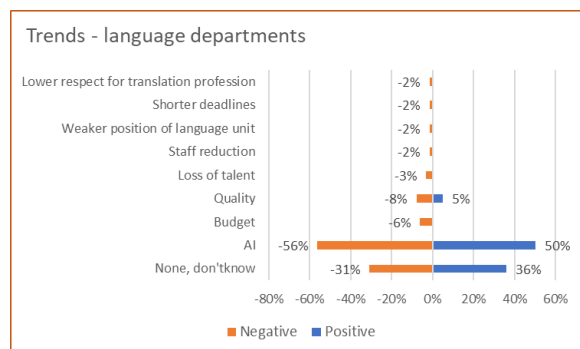


Figure 39 – Trend opinions - language departments

University staff and students

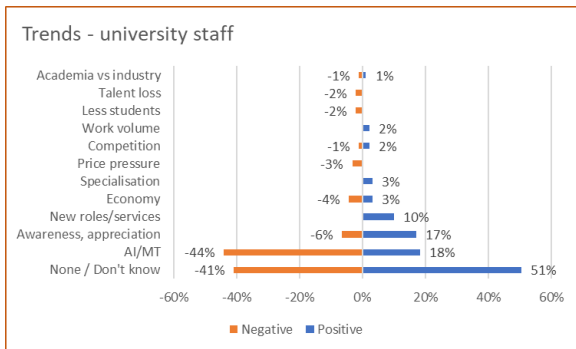


Figure 40 – Trend opinions – university staff

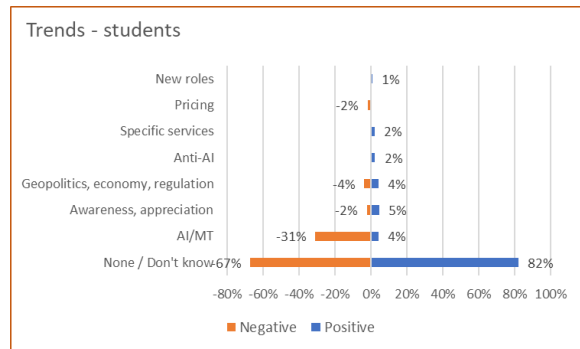


Figure 41 – Trend opinions - students

The non-specific trend opinions of university staff are very similar to those of independent professionals, with a clear negative AI narrative and positive opinions that are mainly focusing on restored market awareness once the AI hype is over.

A few student participants still see the potential of new technology-generated roles and services, but approximately half of the university staff did not reply to the staff questions or commented that they could not identify any.

This absence of opinion is even stronger among the students. Those who did identify trends typically limited themselves to the negative AI trend. The few positive AI comments are framed within the context of ethically applied technology. A few students also flagged active anti-AI resistance as a positive trend, on top of the accrued awareness after AI disappointment that other segments identified.

Challenges

Closely linked to the trends identified by the various stakeholders are the challenges they are facing. Below is an overview of the challenges reported by each segment.

Language service companies

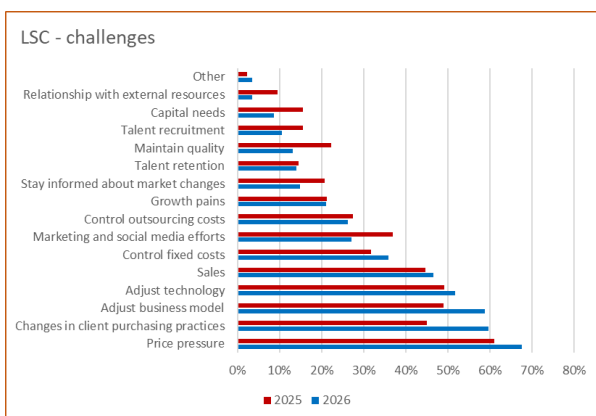


Figure 42 - Challenges - language companies

Language service companies report largely the same types of challenges as in 2025.

The main change is the strong rise of changes in client purchasing practices, which jumps into second place, right behind the unmovable price pressure.

Adjusting the business model goes hand in hand with changing client practices.

Interestingly, marketing efforts are now considered less of a challenge, although increasing sales and marketing efforts was the top choice for language companies to react to 2025 business loss.

The relationship with external resources is not considered as a challenge anymore.

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.

For more information about the concerns that independent language professionals are struggling with, we refer to the sections Industry sentiment and Trends above.

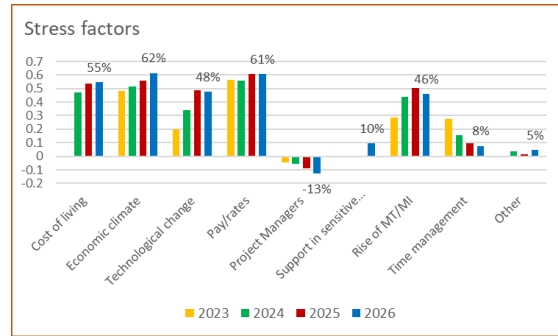


Figure 43 - Stress factors of independent professionals

Language departments

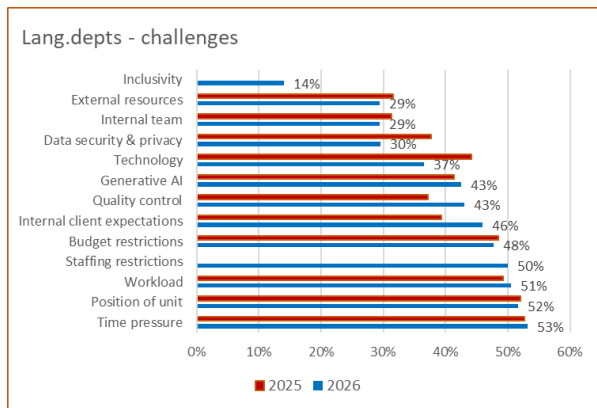


Figure 44 - Challenges - language departments

Language departments do not report major changes in their challenges compared to last year.

Growing challenges are the expectations of their internal clients and dealing with quality control, while handling technology and data security are losing some of their sense of urgency.

Staffing restrictions, which was added to the list of options, immediately appears in the top four, even slightly higher than budget restrictions.

Virtually all challenges can be linked directly or indirectly to the higher use of AI in language departments. Management and internal client departments expect this technology to yield higher productivity and lower costs, which is putting more strain on language departments.

The fact that client departments can also use AI on their own forces language departments to defend their position in the organisation even more than in the past.

University staff and students

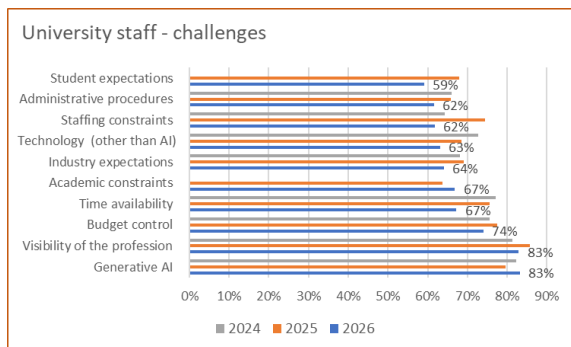


Figure 45 - Challenges - university staff

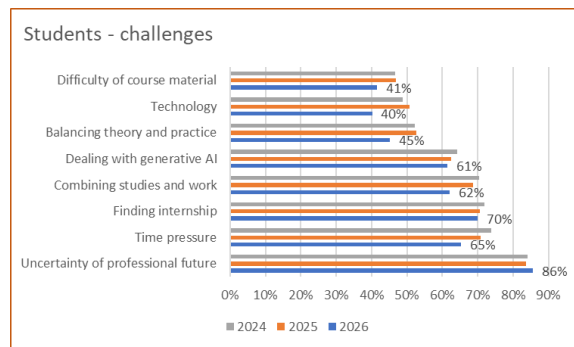


Figure 46 - Challenges - students

With the exception of Gen AI, the visibility of the profession and academic constraints, all topics are considered slightly less challenging by university staff.

Overall, the very high average score (approx. 65%, which is way higher than what language providers and language departments report) suggests that academia is far from the carefree professional environment that it is often depicted as.

The fear of dwindling student numbers (and its consequences for budgets and staffing) is very apparent in the teachers' free comments.

For students the challenges are obviously different, although both teachers and students agree that professional uncertainty and time pressure are among their top challenges. The training programme itself does not seem to be particularly challenging.

AREAS OF BUSINESS

Note: In the charts below, revenue performance is expressed as a percentage, based on a -2 to +2 scale (Strong decrease to Strong increase) and adjusted to the respective weight of the individual category.

Geographic origin

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

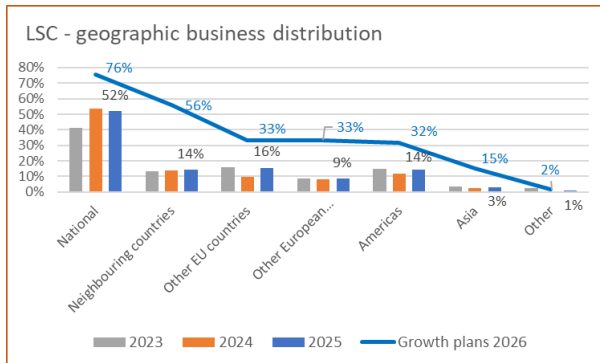


Figure 47 - Geographic origin of revenue - language companies

Although language companies report that on average their local market performed worse than the global one, the share of domestic business remains at the same high (above 50%) level as in 2024.

This high focus on domestic business is strongly correlated with the small average size of the participating language companies, which makes it more difficult for them to compete at an international level.

The 2026 growth plans reflect the same reality, with a high focus on domestic and neighbouring markets.

Note that the current results do not take into account the impact of the changes in American tariff policy, which several participants also mention in their comments regarding negative trends.

Client types (direct clients vs subcontracting)

Independent professionals

Independent language professionals report a slightly higher direct client ratio than in 2024 (48% vs 42%).

They expect SME-type clients, both LSC and non-LSC and even at the level of public administrations, to perform better in 2026 than the larger ones.

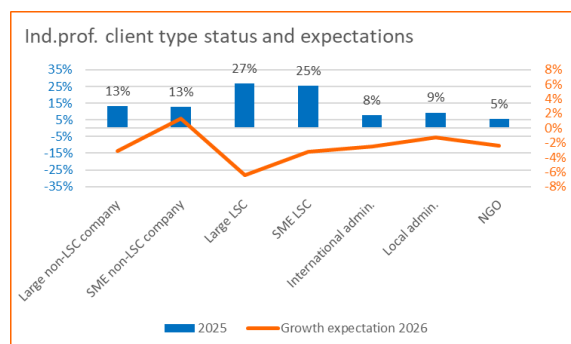


Figure 48 – Client type distribution – independent professionals

The 2024 correlation between client type and actual revenue performance is confirmed for 2025 revenue. Language companies (especially the larger ones) and international public administrations perform worse than average. National/local government agencies and smaller non-LSC companies score best.

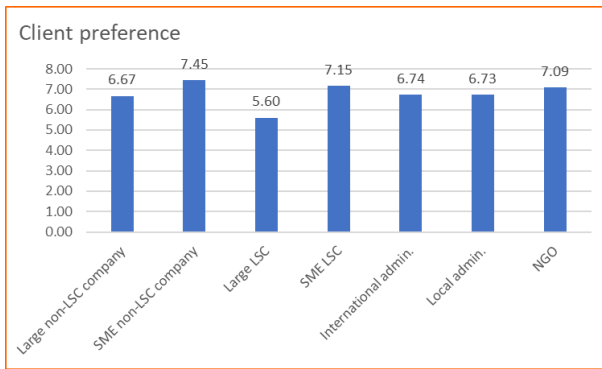


Figure 49 - Client preference - independent professionals

Independent professionals clearly prefer to avoid working for large language companies.

The reasons for this behaviour speak loudly from trend answers and other free text comments: rigid processes and conditions, lower rates, higher time pressure, overwhelming power imbalance and above all the feeling of not being valued.

While the low score for large language companies is the only obvious outlier, the data also show a remarkable *small is beautiful* tendency, both for language company and non-language company clients.

Language companies

Language companies report a similar evolution, but their direct client ratio is far higher than among independent professionals (73% vs 48%).

The direct client ratio increased from 69% to 73%, which means that the growth plans expressed in 2025 did have an effect, even though it remains modest.

Revenue performance for smaller direct clients has improved but deteriorated for large direct clients.

Last year's figures showed that a high reliance on large LSC-type clients currently punished revenue results while the results were far less dramatic for smaller LSC-type clients.

Unfortunately, the latter category has now dropped to levels that are comparable to those of the large language company clients.

Language companies show the same intentions (or expectations) as individual professionals to grow their business with direct clients – in particular the smaller ones, while last year's focus was mainly on large direct clients – and to reduce their subcontracting activity even more drastically.

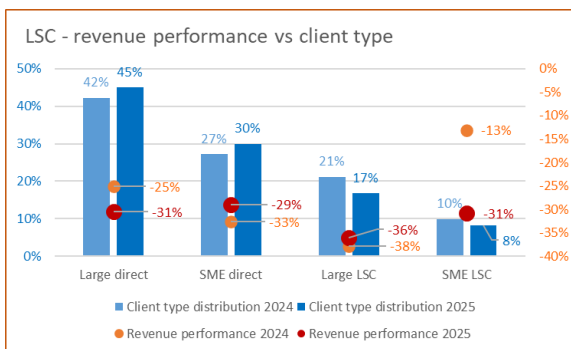


Figure 50 - Direct client ratio vs performance – language companies

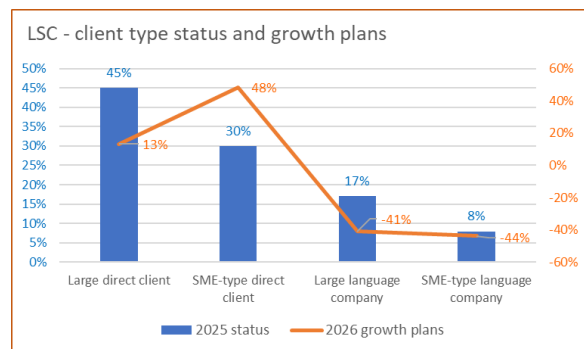


Figure 51 – Direct client ratio – language companies

Services

Language companies

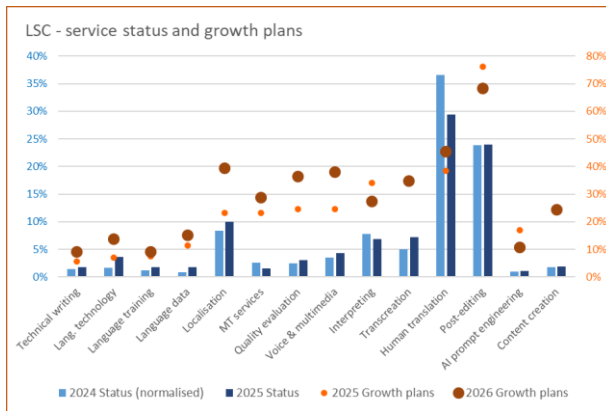


Figure 52 – LSC services status and growth plans

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

Normalising the total of all services to 100%, respondents report a status quo for post-editing at 24% of the revenue total.

Traditional human translation shows a significant drop from 37% to 29%, while smaller categories such as transcreation, localisation and language technology are growing.

Growth plans are focusing strongly on post-editing, but smaller services such as content creation, transcreation, voice services, quality evaluation and localisation are getting considerably more attention than last year.

Independent professionals

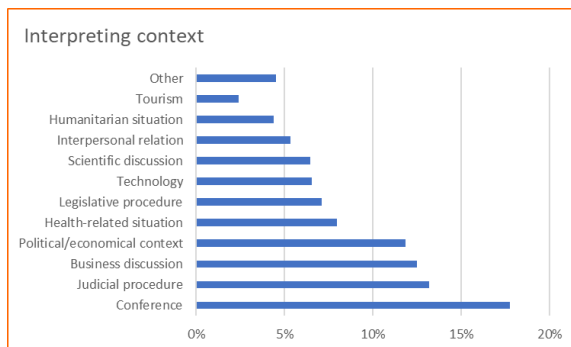


Figure 53 - Interpreting context - independent professionals

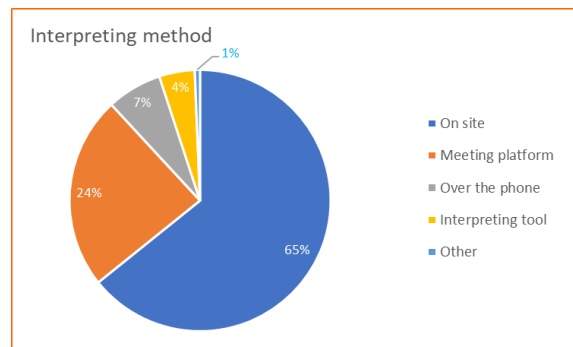


Figure 54 - Interpreting method - independent professionals

The question regarding the context in which interpreting assignments take place revealed a wide variety of circumstances, from humanitarian situations to formal conferences.

Two in three assignments are still carried out with physical presence on site. The majority of remote assignments take place through one of the existing multilingual meeting platforms. Dedicated interpreting tools are only used in 4% of the assignments, while 7% are categorised as over the phone interpreting.

Client domains

Independent professionals

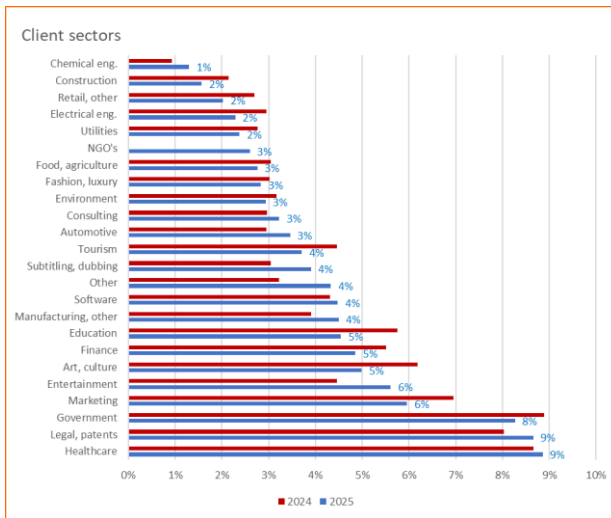


Figure 55 - Domain ranking - language professionals

As expected, the ranking of client domains has not changed dramatically.

The top four client domains remain unchanged, although the results do show some changes that merit closer attention.

Marketing, culture and education, which were introduced last year, are losing some ground, while entertainment and media (subtitling, dubbing) are gaining.

Language companies

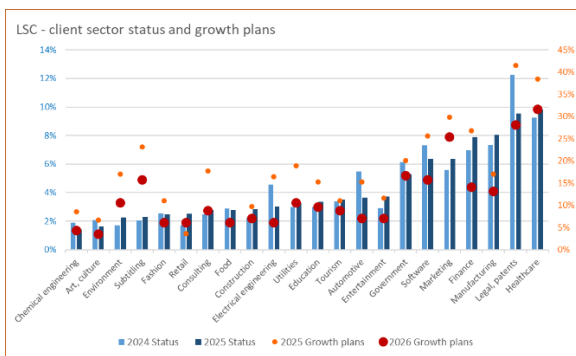


Figure 56 - Client sector status and growth plans - language companies

For language companies the top three client domains remain unchanged, though Healthcare now takes pole position while Legal drops to second place.

Growth plans are tuned down across all domains, but the traditionally strong legal and finance sectors seem to be losing part of their appeal.

Content types (language companies only)

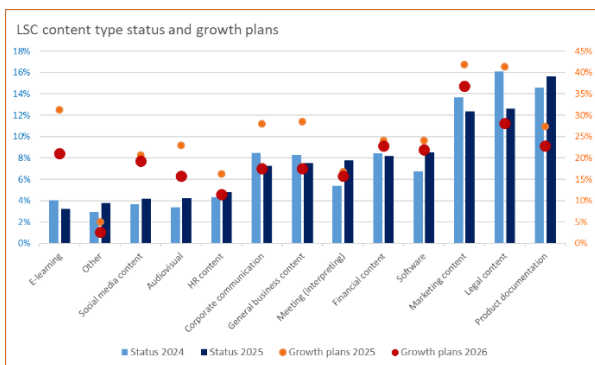


Figure 57 - Content type distribution and growth plans - language companies

The evolution of content types reflects that of client domains. Legal content scores considerably lower, both in actual revenue and in growth plans.

Growth plans for e-Learning and social media seem to be unrealistically high compared to their current weight. The same can be said about audiovisual content, although the data show a somewhat more realistic approach compared to last year.

BUSINESS PRACTICES

Client relationships (independent professionals only)

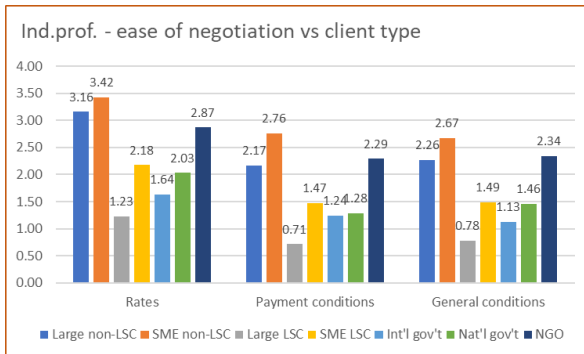


Figure 58 - Negotiation practices - independent professionals

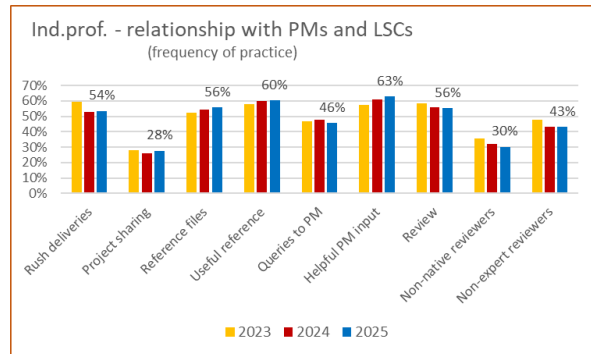


Figure 59 - Collaboration with client PMs

Negotiation with large language companies and international public administrations remains problematic. Conditions are basically set by the companies, with little or no room for negotiation, and even price negotiation is considered to be very difficult.

The opposite is true for smaller non-LSC companies and NGO's, where negotiation of rates, payment conditions and general conditions are reportedly much easier.

On the other hand, independent professionals continue to report slightly improved relationships with client project managers. This is in line with the feedback received from some language companies that they are reducing the number of external resources but intensifying the interaction with the remaining ones.

Company culture

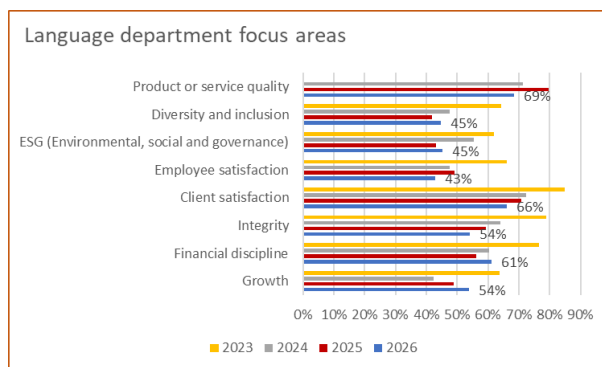


Figure 60 - Organisation focus - language departments

While this year's shifts in focus areas are small, we cannot help but notice a gradual erosion in general focus level since ELIS started to monitor this aspect of organisation culture in 2023.

This is particularly the case for Employee satisfaction, but also in the areas Integrity and even Client satisfaction.

Focus areas are strongly linked to the type of organisation. Growth and client satisfaction are key focus areas for companies (both international and local), while Diversity, Social governance and Integrity score highest among public administrations. Interestingly though, Employee satisfaction scores lowest among the few international administrations that participated.

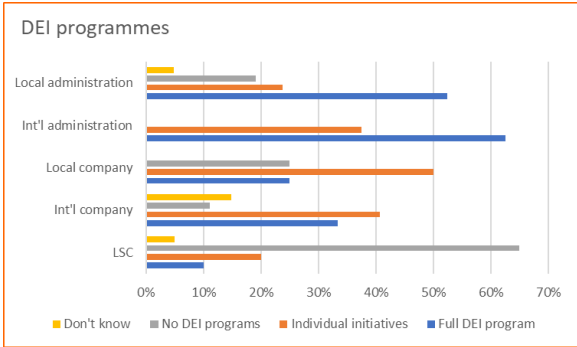


Figure 61 - DEI programmes

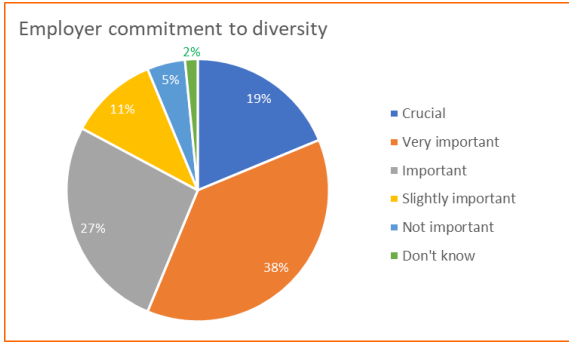


Figure 62 - Commitment to diversity - language departments

As expected, the implementation of formal diversity (DEI) programmes follows the same logic as the focus areas and varies significantly among the different organisation types.

While strongly present in both local and international administrations, they are virtually non-existent in language service companies.

This is most certainly at least partially linked to the small size of the language companies, which makes the implementation and monitoring of full formal programmes prohibitive. However, this does not mean that language companies do not pay any attention at all to diversity initiatives. Of the 20 LSC participants that answered the question about DEI programmes, four reported that their companies had indeed implemented informal or specific DEI-related initiatives.

Across all language departments, the vast majority of participants consider their employer's commitment to diversity as important, very important or even crucial.

Outsourcing

Language departments

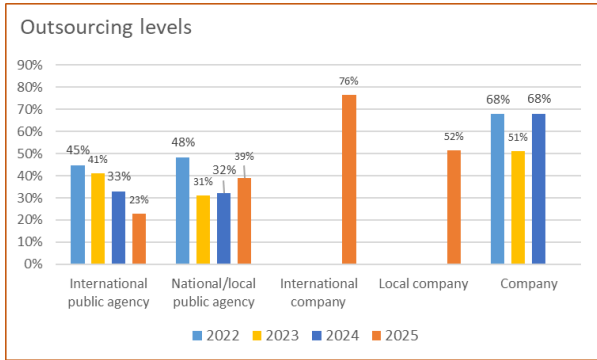


Figure 63 - Outsourcing levels - language departments

Average outsourcing levels vary widely by organisation type.

Whereas international companies report the highest outsourcing levels, as expected, this is absolutely not the case for international public administrations.

The very small number of answers from the latter make this year's result of 23% highly unreliable, but the historic track record does indicate that the outsourcing level in these organisations is far lower than average.

The data do not show any change in the mix of outsourced services. Language departments remain very reluctant to outsource services such as language asset management or even terminology management, although language providers are theoretically ideally suited to perform such services.

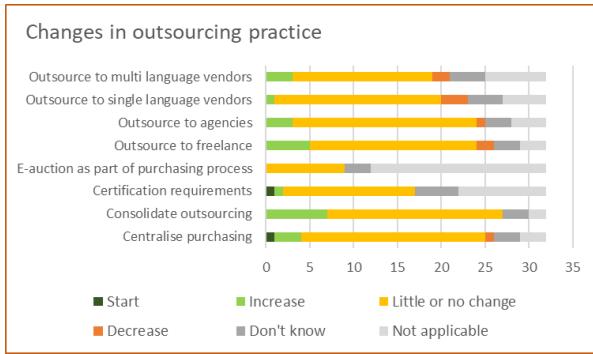


Figure 64 - Changes in outsourcing practice - language departments

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

All other changes are so small that they cannot be considered as reliable trend indicators, especially given the small total number of answers.

E-auctioning, once considered a potential source of disruption, has all but disappeared from the chart.

Language service companies

Language service companies continue to increase their level of outsourcing. Approximately 64% of their business is now outsourced.

The amount that is outsourced to independent professionals remains stable at 75% and is not likely to change in the near future.

68% of the participating language companies outsource more than half of their language work.

Only 4 participants reported that they do not outsource anything.

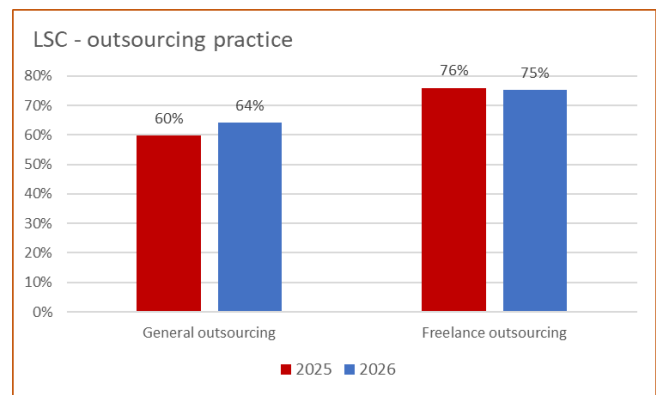


Figure 65 - Language company outsourcing practice

DEALING WITH TECHNOLOGY

Technology implementation

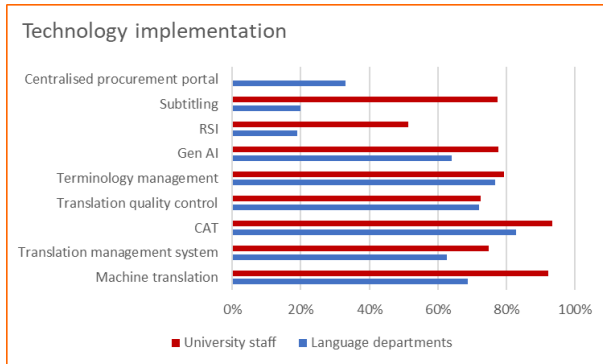


Figure 66 - Technology implementation

Due to the discrepancy between technology implementation and actual usage, and the blurring of boundaries between different technologies (CAT vs TMS, MT vs GenAI), language companies and independent professionals are not monitoring the technology implementation anymore and are focusing on actual usage.

In universities and language departments, implementation continued to increase across the board.

In one year, language departments have doubled their implementation level for generative AI from 30% to 64%. Only 6% are not considering to implement it.

The use of centralised procurement panels among language departments has clearly reached its ceiling and is not increasing anymore.

Machine translation and Generative AI

MT and Gen AI actual usage

The border between MT and AI has completely blurred. 73% of AI usage by language departments is to replace dedicated MT engines. This makes the analysis of MT and AI usage much more difficult than in the past and is leading to underestimated MT usage figures, in particular for language companies and language departments.

To get a clearer picture of the actual usage, we are therefore not only looking at the reported usage levels, but also at post-editing frequencies which do not differentiate between dedicated MT engines and the use of generative AI as a replacement of those engines.

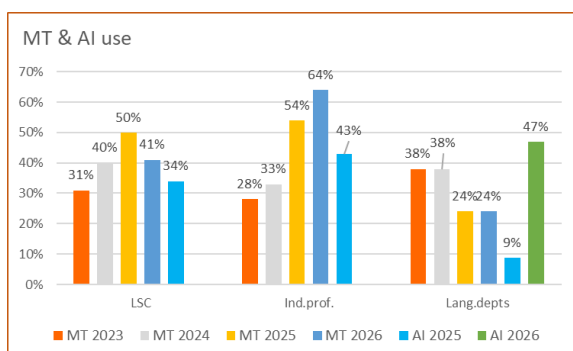


Figure 67 - Actual MT and AI use

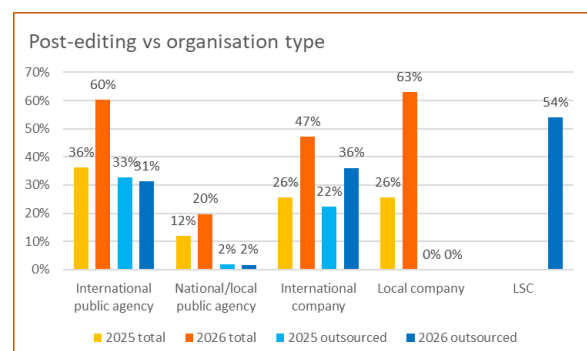


Figure 68 - Post-editing vs organisation type

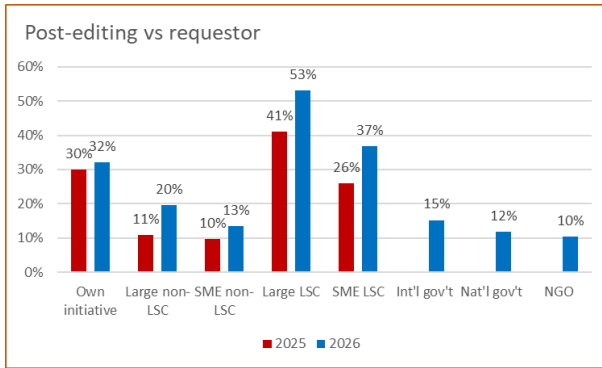


Figure 69 - Post-editing requests vs requestor type

The post-editing angle reveals a stunning 63% total usage of automated translation among independent translators, which is divided equally between post-editing of content that has already been pretranslated by the client (adjusted to the respective weight of each client type) and non-pretranslated content on which the professional is using MT/AI on their own initiative.

The frequency of post-editing requests differs widely among the clients of independent professionals, ranging from less than 15% for non-language companies and public administrations to 53% for work outsourced by large language companies. The latter may even be an underestimate since language companies themselves report an average 54% for outsourced post-editing work, across both large and small companies.

Post-editing quality expectations and discounts

There is much debate about the quality level that can be expected from post-edited content. Some maintain that the quality after post-editing should equal that of pure human translation while others concede that working with pre-translated content inevitably leads to a certain loss of quality.

ELIS 2026 is trying to shed some light on the topic by comparing the opinions of the various stakeholders. What do the language buyers expect? What do language companies think that their clients expect? And what do they expect from their post-editors? And what do the independent professionals think?

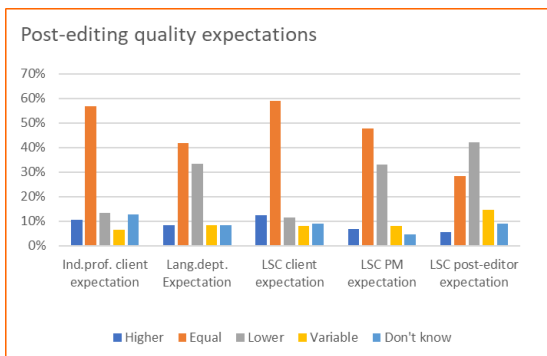


Figure 70 – Post-editing quality expectations

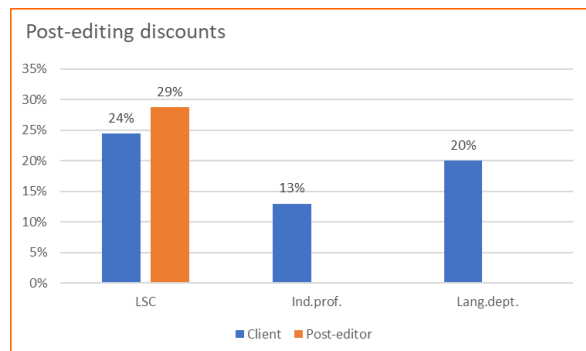


Figure 71 – Post-editing discounts

The result is an interesting mix of realism and misaligned opinions.

Language companies and individual professionals are both convinced that their clients expect post-editing quality that rivals human translation quality. In reality, language departments are very much aware that this is not the case. More than 30% of language department participants expect post-editing quality to be (slightly) lower.

Language companies also admit that their post-editing output does not quite reach the level of human translation and expect even less from the post-editors.

These expectations are also reflected in rate discounts that are negotiated between clients, language companies and language professionals. Although translator forums are filled with stories about astronomical discounts of up to 90%, the ELIS 2026 data show a narrow band centred around 20%.

The average discounts range from 13% reported by independent professionals to 29% reported by language companies as an average discount between them and their external post-editors. Language departments report an average post-editing discount of 20%.

Automated translation quality (MT or AI)

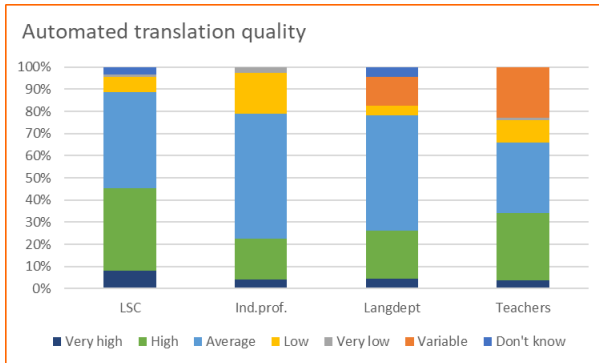


Figure 72 - Automated translation quality

Interestingly, language professionals and language companies are becoming more critical about the quality delivered by dedicated MT engines and large language models, with only 23% of independent professionals scoring the quality as high to very high, compared to 40% in 2025.

This may be the result of the wider use of the technology. The effect of the increased fluency that GenAI introduced is wearing off.

MT / HT equivalence

The provocative question of when machine translation (dedicated MT engines or Gen AI) will reach the same quality level as average human translation yielded very mixed results.

Language companies are very (too?) optimistic, with one in two expecting this to happen within less than ten years.

Between 27% and 35% of the participants however expect that human quality level will never be reached.

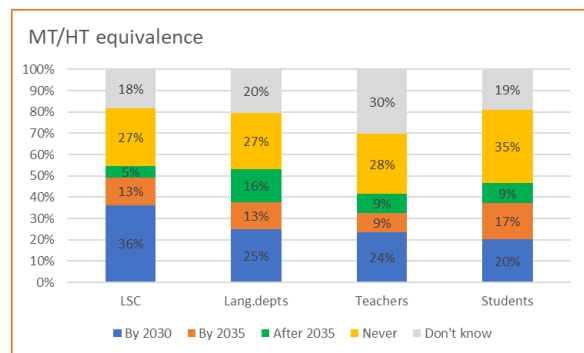


Figure 73 – MT/HT equivalence

Several participants made the remark that average human quality does not really exist, and that this question does not take into account the difference between different contexts and content types.

These are fair comments. They confirm that translation quality is a complex topic. The fact that international standards such as ISO 17100 and ISO 18587 (created specifically for post-editing services) carefully avoid the matter of defining output quality says it all.

AI impact

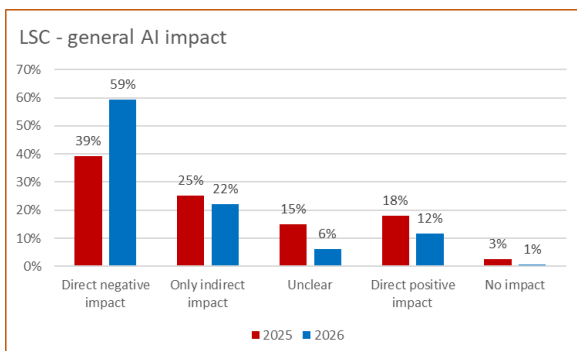


Figure 74 - General AI impact - language companies

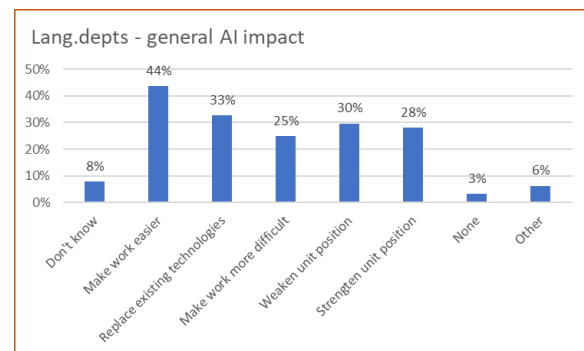


Figure 75 - General AI impact - language departments

All segments are reporting the major impact of artificial intelligence. Language companies express a clearly more negative opinion than last year, with 59% seeing a direct negative impact (20% higher than in 2025) and only 12% reporting a positive one (6% lower than in 2025).

Regarding the business impact after AI implementation, language companies report more polarised opinions, with strong support linked to increased productivity and efficiency and reduced costs (resp. 58% and 38%) but also a higher percentage that report a negative impact (23% compared to only 13% in 2025), mainly linked to loss of business.

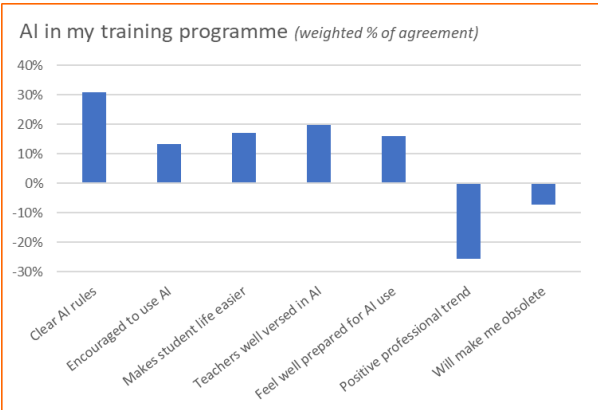
Language departments paint a balanced but at the same time confusing picture, with 44% stating that AI is making their life easier (but 25% declaring the opposite) and 28% seeing it as a way to strengthen the position of the department within their organisation (while 30% think that it will weaken their position). These contradictions are a confirmation of the answers regarding positive and negative industry trends.

AI in training

The use of AI in translation training programmes remains a work in progress.

47% of training staff report that their university has rules in place regarding the use of AI, which is only 4% more than last year. The ratio between EMT and non-EMT institutes has not changed.

One in two participants do not know whether their institute participates in AI-related initiatives (both for EMT and non-EMT universities).



Students are relatively satisfied with the way that AI is integrated into their training programme, even though they see it as a negative trend with regards to their future profession.

Figure 76 - AI statements - students

Preferred tools

Tool usage has not changed rapidly, which is due to the important effect of the installed base. Once a company has started to use a particular tool, it is hard to switch to another one, due to the investment required and the effort to change operational processes.

Nevertheless, the lists below may be of use to training institutes when deciding whether to integrate specific tools into their programmes or not.

The indication “*embedded*” means that the user is using the integrated functionality of a wider suite of tools, such as one of the main CAT suites, an Office-type tool environment or an online communication platform.

Language companies

Audiovisual localization		Automated quality control		CAT tools		Corpus analysis		Generative AI non MT		Interpreting	
Subtitle Edit	17	XBench	36	RWS/SDL/Trados	139	RWS/SDL/Trados	8	ChatGPT	51	Embedded	36
CaptionHub	11	Embedded	29	MemoQ	78	MemoQ	6	Gemini	16	Interprefy	10
Adobe Premiere	9	Verifika	16	Phrase	38	Proprietary	6	Claude	12	Proprietary	6
HappyScribe	6	Proprietary	6	XTM	11	ChatGPT	3	Chat GPT	8	Kudo	5
Checksub	5	Languagecheck.ai	3	Crowdin	4	Sketch Engine	3	Copilot	6	Akouo	3
Heygen	4	PerfectIT	2	Proprietary	4	XBench	3	DeepL	8	InterpretBank	3
Transcript.io	4	TAUS	1	Embedded	3	Phrase	2	Perplexity	6		
Proprietary	3			firstCAT	3			Proprietary	6		
Amberscript	3			Smartcat	3			Phrase	3		
Authôt	3			Across	2			Whisper	3		
Chat GPT	3							Embedded	2		
Embedded	3							Fibery AI	2		
Limecraft	3							NotebookLM	2		
Lipdub	3							Replit	2		
Oona	3										
Sonix	3										
SubX	3										
Turboscribe	3										
CapCut	2										
DeepL	2										
EZtitle	2										
MediaCAT	2										
Aegis	1										

MT		OCR		Terminology		Translation management		Voice recognition	
DeepL	130	Abby	60	Multiterm	41	Plunet	38	Embedded	11
Embedded	28	Adobe	20	Embedded	33	XTRF	25	Limecraft	6
ChatGPT	12	Adobe Acrobat	9	Embedded	6	Proprietary	23	Adobe Premiere	3
ModernMT	8	Proprietary	5	Proprietary	6	Embedded	16	Azure Voice	3
Proprietary	7	ChatGPT	3	ChatGPT	3	Projetex	11	Dragon	3
custom.mt	6	InDesign	2	QTerm	3	Gingout	3	E-dictate	3
Gemini	5	PDFXchange Editor	2	XBench	2	LBS	3	Heygen	3
Systran	5	Prizmo	2			Linear	3	JUST	3
Google Translate	3					LSPExpert	3	Maestro	3
Language Weaver	3					Odo	3	otter.ai	3
LARA	3					Planner	3	Plaud	3
Omniscien	3					PoliLingua.com	3	Proprietary	3
Amazon	2					Project open	3	Sonix	3
Globalese	2					QTerm	3	Turboscribe	3
Microsoft MT	2					Sellys	3	Whisper	3
						Traduno	3	Omniscien	2
						Monday.com	2		
						TP-Box	2		

The above lists show the tools that are mentioned by language company participants.

From the results, it is obvious that tool categories are merging. Functionalities such as quality control, translation management, terminology management and machine translation are now seamlessly integrated within the traditional CAT tools. The traditional CAT suites Trados (RWS/SDL), MemoQ and Phrase (formerly Memsources) remain unchallenged, despite the existence of multiple alternatives, which proves that installed base remains a powerful factor in success, provided that the makers manage to properly integrate the new technologies that language companies require.

Independent language professionals

Audiovisual localisation		Automated quality control		CAT tools		Corpus analysis		Generative AI for language purposes other than MT		Generative AI for non-language purposes	
Subtitle Edit	67	Embedded	125	RWS/SDL/Trados	425	Embedded	35	ChatGPT	132	ChatGPT	127
Embedded	29	XBench	52	MemoQ	214	AntConc	18	Claude	32	Claude	25
Proprietary	15	Antidote	6	Phrase	93	Sketch engine	9	Gemini	32	Gemini	22
Aegisub	13	Grammarly	5	Wordfast	39	Linguee	7	Perplexity	21	Perplexity	16
Originator	9	Verifika	5	XTM	26	Google tools	6	DeepL	17	Copilot	13
WinCaps	6	LanguageTool	4	MateCat	18	BootCat	5	Copilot	11	Embedded	6
CaptionHub	5	PerfectIt	4	SmartCAT	18	Eur-Lex	4	Google tools	11	Google tools	5
Ooona	5	Proprietary	4	Smartling	16	Context	3	CotranslatorAI	6	Mistral	5
Sfera	5	QA Distiller	4	Wordbee	16	CotranslatorAI	3	Proprietary	6	CotranslatorAI	3
Spot	5	Adobe Acrobat	3	Embedded	15	gaois.ie	3	Proz pasteyp	3	DeepSeek	3
Audacity	3	Check Sheet	3	Across	12	Proprietary	3	TradCalc	3	Grok	3
Crowdin	3	Duden Korrektor	3	OmegaT	10	Slovak national corpus	3	Duck.AI	2	Le Chat AI	3
Deepdub	3	Le Robert	3	Proprietary	10	Wortschatz Uni Leipzig	3	Google Translate	2	Adobe Firefly	2
Editsub	3	Quillbot	3	Lokalise	9	corpas.ie	2			Certificates	2
VLC	3	Copilot	2	Star Transit	9	TechDico	1			Canva	1
Amara	2	Scatter Chart	2	Déjà Vu	7	WordNet	1			RPA+AI	1
Subtitle Workshop	2	Stratification	1	Crowdin	6						
Caption Maker	1	Transistor	1	CafeTran	5						
				Polyglot	5						
				Foreign Desk	3						
				SmartEditor	3						
				TSO	3						
				Wordscope	3						
				TWS	2						
				XBench	2						

Interpreting		Machine Translation		Optical character recognition		Terminology management		Translation management		Voice recognition	
Embedded	40	DeepL	183	ABBY	101	Embedded	160	Embedded	135	Dragon	27
InterpretBank	6	Embedded	97	Adobe Acrobat	44	MultiTerm	106	LSP Expert	9	Embedded	12
ChatGPT	4	ChatGPT	28	Embedded	23	InterpretBank	9	Proprietary	9	SpeechTexter	6
Interprefy	4	Google Translate	16	Google tools	8	Proprietary	6	Gespoint	3	Google tools	4
CymoNote	3	ModernMT	13	OmniPage	6	QTerm	5	Notion	3	Audacity	3
Perplexity	3	eTranslation	6	Proprietary	6	CotranslatorAI	3	Translation Office 3	3	CymoNote	3
Claude	2	Linguee	5	ChatGPT	5	Goldpan	3	XTRF	3	MemoQ	3
Interactio	1	Microsoft Translate	5	ILovePDF	5	late	3	Google tools	2	Plaud AI	3
Kudo	1	Claude	3	Nitro pro	5	Interplex	3	Outlook	2	Speechmatics	3
		CotranslatorAI	3	Annabin	3	Logiterm	2	Linguee	1	TextAloud	3
		Language Cloud	3	Ashampoo	3	TermoStat	2			WisprAI	3
		NeuralDesktop	3	eTranslation	3	Wipo Pearl	2			Letterly	2
		Opus cat	3	live text	3	Jurivoc	1			Microsoft	2
		Weglot	3	OCROPUS	3	Okapi Rainbow	1			Whisper	2
		Copilot	2	PDF Reader	3	Termdat	1			Gboard	1
		Crowdin	2	PDF X-Change Editor	3					Gemini	1
		EPO Patent Transla	2	Pdf2go	3						
		Gemini	2	PDFelement	3						
		Lilt	2	Doctr	2						
		Amazon	1	PDF Pro	2						
				PDF24	2						
				Copilot	1						
				Tesseract	1						

In general, independent professionals report a much more varied tool usage than language companies.

This is not unexpected. Companies typically value overall efficiency over specific features that may make the life of an individual professional easier. Another element is obviously the wider availability of tools, especially in the CAT category, that have been developed specifically with the individual translator in mind.

Overall, the market leaders are the same as for the language companies, which is logical given that subcontracting often means that client and provider use the same tools. According to 51% of the participants, this is the case for work performed for large language company clients, though the requirement is a lot less stringent for other client types.

Language departments

Audiovisual localization		Automated quality control		CAT tools (translation memory)		Corpus analysis		Generative AI for language purposes other than MT	
SubtitleEdit	6	Embedded	29	RWS/SDL/Trados	83	Sketch Engine	6	Copilot	38
Synthesia	5	Xbench	6	memoQ	16	cursor	3	ChatGPT	33
Captionhub	3	Antidote	5	Embedded	21	Korp GU	3	Gemini	14
Embedded	6	Eleks	3	XTM	13	Proprietary	3	Proprietary	12
HeyGen	3	Proprietary	3	Phrase	10	Quest	3	Claude	6
Smartling	3	Ruby checker	3	Transit	6	Juremy	2	Embedded	4
Whisper	3	LanguageTool	2	Smartling	4			cursor	3
matedub	2	PerfectIt	2	Proprietary	3			figma	3
Quickchannel	2			Wordbee	3			Google tools	3
matesub	1			Wordfast	3			Mistral	3
				CafeTran	2			Modelfront	3
								Perplexity	3
								AI Assistant	2
								Grammarly	2
								Le Chat	2
								oss-gpt	2

Interpreting		Machine translation		Optical character recognition		Terminology management		Translation management		Voice recognition	
Embedded	6	DeepL	38	Adobe Acrobat	9	MultiTerm	39	Embedded	43	Dragon	9
BoothMate	3	eTranslation	23	Proprietary	6	Embedded	28	XTM	12	Whisper	6
Copilot	3	Embedded	33	Apple	3	XTM	9	Crowdin	10	Apple	3
Sketch Engine	2	ChatGPT	10	Foxit PDF Editor	3	Proprietary	6	Lokalise	8	Embedded	3
InterpretBank	1	Copilot	8	MobiPDF	3	Coreon	3	Proprietary	8	Gemini	3
		Language Weaver	8	PDF XChange Editor	3	Kalcium	3	Plunet	6	Proprietary	3
		Proprietary	8			qTerm	3	AVS by i.syde	3		
		Google Translate	6			Quickterm	3	CLM	3		
		Intento	6			TERMDAT	3	Jira	3		
		Opus-Cat	5			Termweb	3	Microsoft Lists	3		
		Claude	3			late	2	Passolo	3		
		Itzuli	3			Kaleidoscope	2	ServiceNow	3		
		Le Chat	3			Termstar	2	Tradivarius	2		
		Microsoft translate	3					Tradova	1		
		ModernMT	3								
		Systran	3								
		Tilde	3								
		Mistral	2								
		Modelfront	2								
		Perplexity	2								
		Presidency Translat	2								

Language departments show similar tool rankings, with a few exceptions that reflect the public administration aspect, such as the high ranking of eTranslation (the MT engine used by EU administrations) and a far less dominant position of free online tools such as ChatGPT.

WORKING IN THE LANGUAGE INDUSTRY

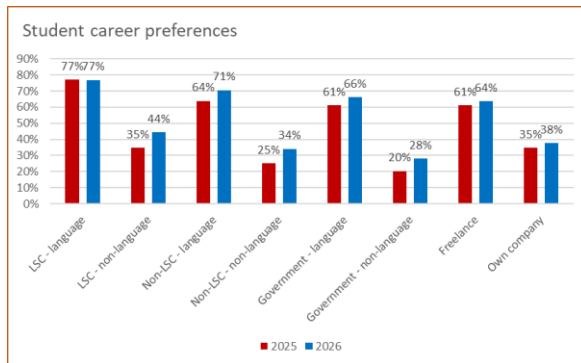


Figure 77 - Student career preferences

Students make it very clear that they are not changing their career preferences, despite the changes in the industry.

Language-centric roles continue to be their main focus.

The actual employer environment is considered less important, although they express a very slight preference for a position in a language company.

Staff levels and recruitment

The ELIS 2026 results do not show a solid foundation to support these ambitions, but we cannot exclude that ELIS is overlooking employment opportunities as a result of the under-representation of specific industry segments such as large language companies or new technology-driven language services.

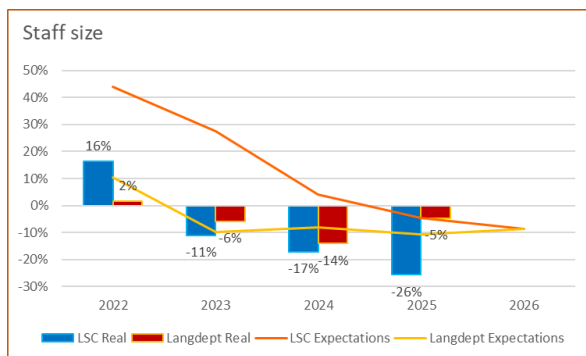


Figure 78 - LSC and language department staffing

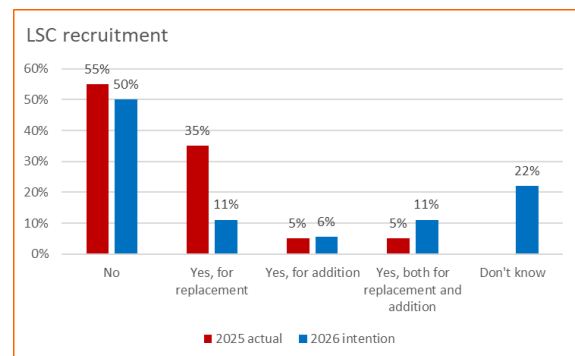


Figure 79 - LSC staffing and recruitment

47% of language company participants report lower staffing levels in 2025 and only 7% an increase, which is even worse than previous year. Language departments have very similar views though the damage is less dramatic, with 25% reporting a decrease and 17% an increase.

50% of language companies do not expect any recruitment and an additional 11% state that they would only consider replacement hirings.

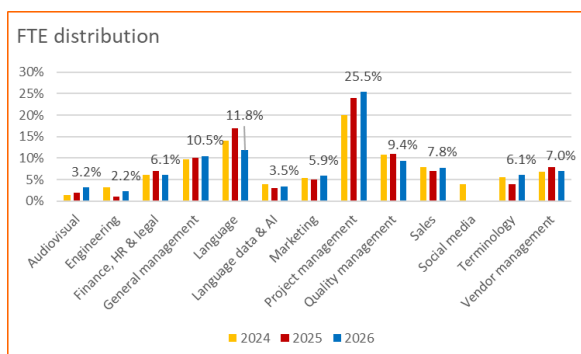


Figure 80 - LSC - Functional distribution

Language companies and language departments expect that staffing levels will continue to drop in 2026. Language companies are also restructuring their workforce, reducing significantly their language production.

To make things worse, 17% of independent professionals are considering ending their freelance activity and all segments expect the number of language companies to decrease.

All parameters are telling us the same thing: the traditional employment roles in the language industry are under heavy pressure.

At the same time however, the industry is buzzing with stories about language companies that are reinventing themselves, combining traditional language expertise with new activities to create additional value and secure their position in the industry.

These initiatives are still new and success is still uncertain, but it is already obvious that they will require a much wider definition of the language-centric career that students are looking for.

Employment quality

While employability levels are obviously important to consider a career in a particular industry, one also needs to consider the quality of employment.

Work-life balance

Work-life balance is traditionally one of the fortes of the language industry.

Across all segments participants report a stable and slightly higher than average work-life balance.

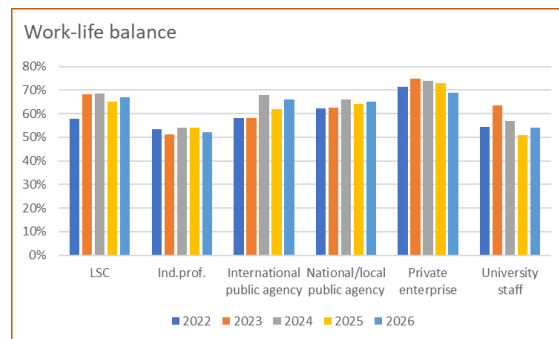


Figure 81 - Work-life balance

Career satisfaction

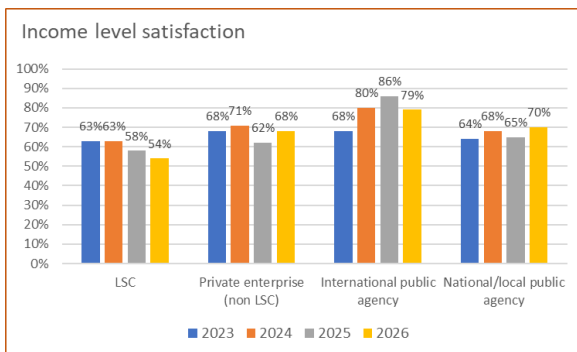


Figure 82 – Income level – language companies and departments

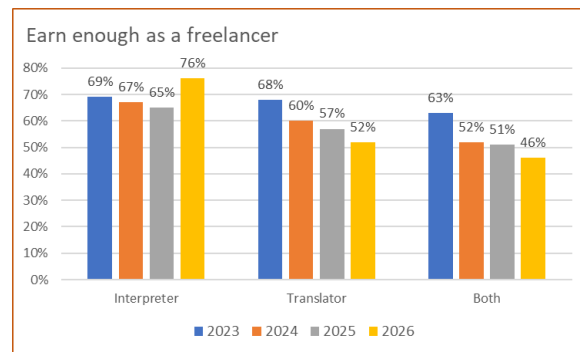


Figure 83 – Income level – independent professionals

Income satisfaction remains stable among participants of language departments, but continues to erode among language companies. While language company income satisfaction is roughly the same for all roles, it is important to remember that 70% of the language company participants are company owners whose income is directly dependent on their company's financial situation.

Among independent language professionals we see a further decline of income satisfaction, except for those that are only active as interpreters, whose satisfaction rose considerably compared to previous years.

Professionals who combine translation with interpreting seem to be hit hardest, possibly because they cannot take advantage of the mitigating effects of specialisation or tool efficiencies.

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

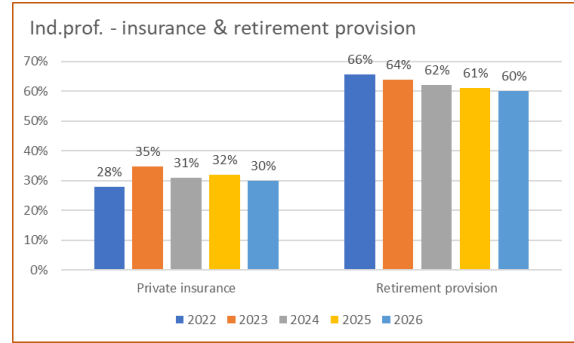


Figure 84 - Private insurance and retirement provisions – independent professionals

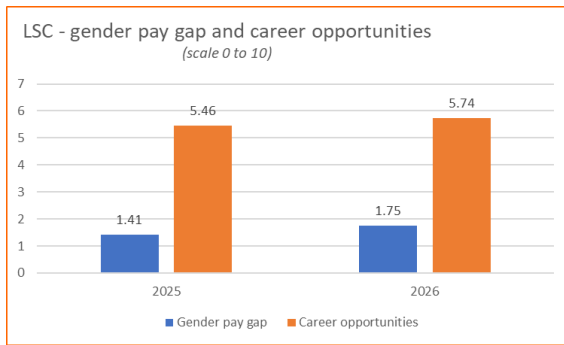


Figure 85 - LSC gender pay gap and career opportunities

The reported gender pay gap in language companies has slightly increased compared to 2025.

Although the overall score remains very low, it hides a significant difference between female (2.6) and male (1.1) participants.

Career opportunities show a gender bias as well, but here the difference between female (5.66) and male (5.90) scores is much smaller.

Training and continuous professional development (CPD)

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

In 2025 the participating members of language departments spent on average approximately 24 hours on personal development, which is 0.5 hours per week. However, the data show strong differences

between different organisation types, ranging from less than 10 (local companies, research institutes, NGO's) to more than 30 (international public administrations).

Personal development time in language departments increased by 10% compared to last year.

The same increase is visible among university staff, both in EMT and non-EMT institutions, with non-EMT staff (51 hrs) reporting significantly higher personal development time than their EMT colleagues (43 hrs).

Independent professionals reported on average 4.3 CPD sessions, which is slightly lower than last year's 4.7. Data about actual duration are not available.

62% (not taking into account the 14% Don't knows) of professionals report that the return on their CPD investment was as expected or better, which is slightly lower than the 65% of last year.

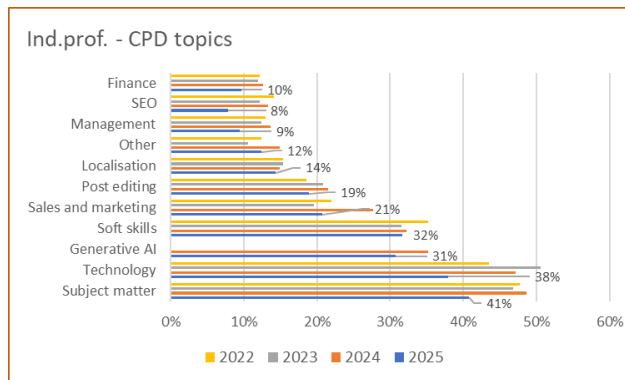


Figure 86 - CPD topics - independent professionals

All topics score somewhat lower than last year, which is a logical consequence of the lower CPD frequency.

The topic mix itself has not changed significantly, except for a slightly stronger interest for soft skills and a lower interest for SEO (already one of the less popular topics).

The top three (subject matter areas, technology in general and Gen AI) remains unchallenged. The strong increase of sales and marketing training, visible in last year's data, did not repeat itself this year.

Required skills

Aligning training programmes with the skills that are required by the market is a constant concern for all training institutes and the fact that individual employers may have very different expectations does not help.

This year's skill appreciation scores show mixed results.

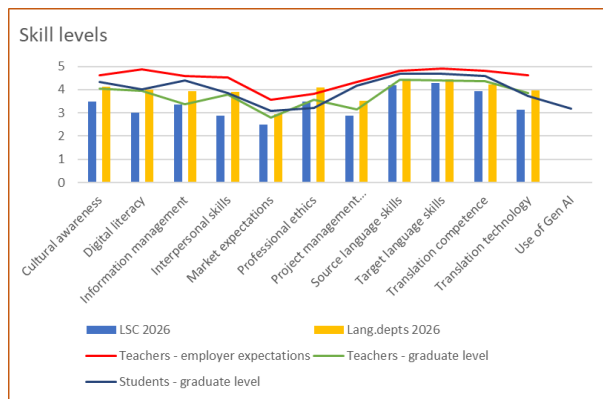


Figure 87 - Skill levels

With an average score of 3.37 (on a scale of 5, where 3 represents Independent use and 5 Advanced use), language companies are considerably more satisfied than in 2025 (score 2.92), while the traditionally more lenient language departments are slightly more critical this year (3.95 vs 4.08 in 2025).

Both scores are below what teachers consider to be employer expectations, but language department scores are in line with what teachers see as reasonable skill levels for their Master's graduates.

Compared to the language company scores students seem overconfident in their own skill levels. They are however fairly close to the language department opinions and are realistic in terms of weak and strong skills.

Market expectations and project management skills remain the weakest areas according to both language companies and language departments, despite significantly higher scores from language companies.

Core translation skills (Source language, Target language and Translation competence) score very high (close to or above level 4), both for language companies and language departments.

LANGUAGE INDUSTRY TRAINING LANDSCAPE

This section 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

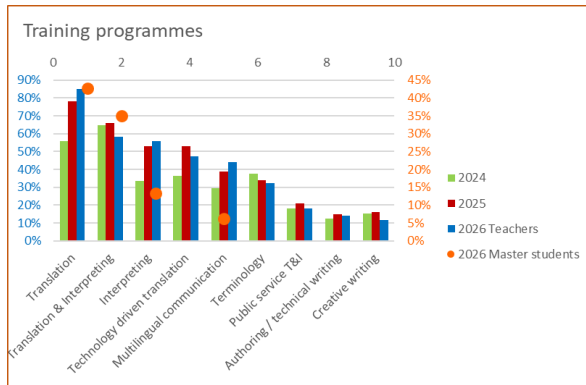


Figure 88 – Training programmes

The increase of specific Translation or Interpreting programmes compared to a combined T&I programme seems to contradict the wide-spread opinion that the combined programme is becoming more popular.

Specialists in the area argue that the counter-intuitive data may be caused by naming conventions in the different countries or the unclear distinction between training programmes and specialisations.

The student data seem to confirm that opinion. 35% of the participating students chose the combined Translation & Interpreting programme, compared to only 21% in 2025, which points at a growing success of the combined programme.

Other programmes such as Terminology, PSTI etc. are not mentioned by the participating students, possibly because these are considered as specialisations and not as entire programmes.

The vast majority of translation or interpreting Master's students (71%) are following a traditional trajectory, starting their Master's programme after a standard language Bachelor's degree, usually obtained at the same institute.

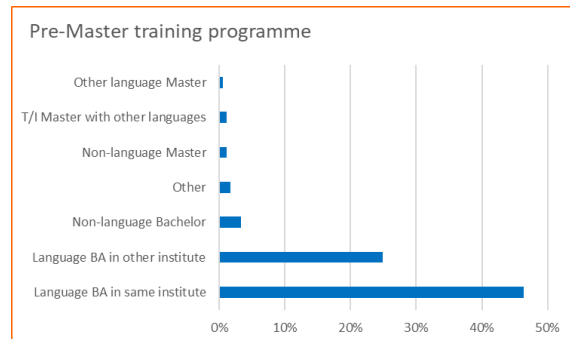


Figure 89 - Pre-Master training programme

Specialisations

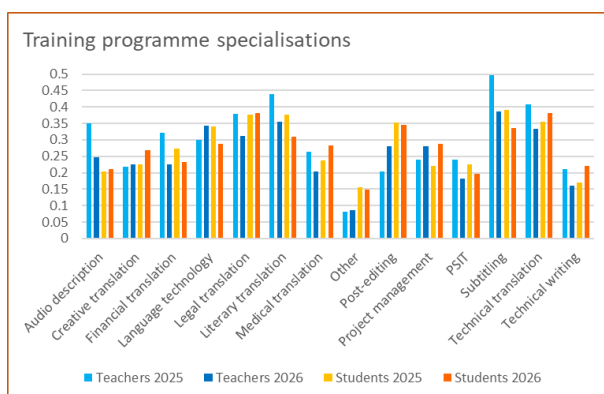


Figure 90 - Training programme specialisations

Students report a small but significant increase in popularity of creative and medical translation as well as project management and technical writing.

Teachers report a decline in specialisations, except for creative translation, language technology, post-editing and project management.

In particular, the decline in subtitling (the top specialisation in 2025, also among students) is remarkable.

Languages

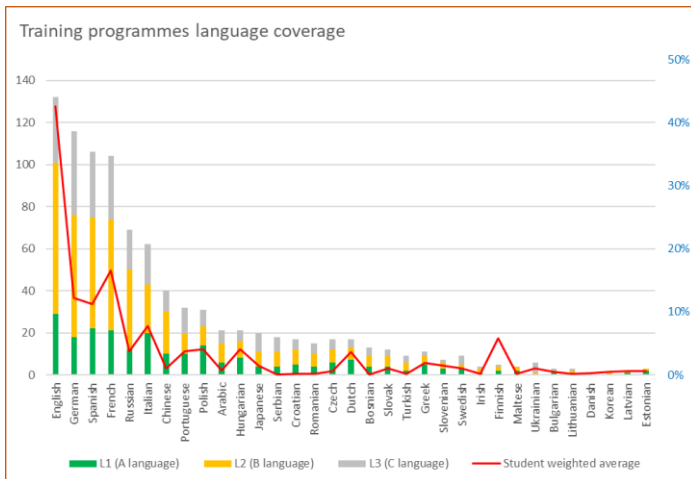


Figure 91 - Training programme languages

The 2026 results do not show any meaningful shifts in language coverage. This is in line with the information about academic evolution (see *Figure 29 - Academic evolution - university staff*) which indicated no major changes in languages covered.

Some unexpected student peaks are the result of a high number of students participating from specific countries (ex. Finland).

Number of students

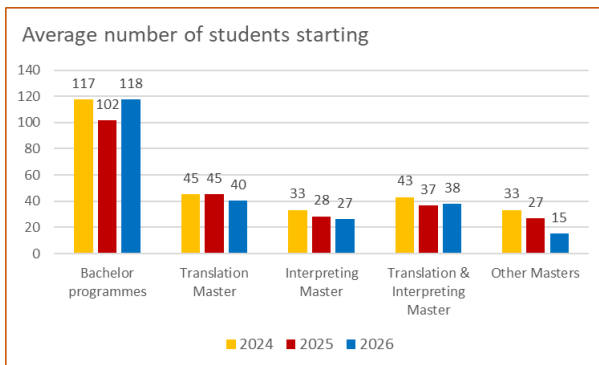


Figure 92 - Average student numbers - university staff

This year's new student data, in particular about new Bachelor's students, does not seem to show the continued decline of student numbers that teachers are concerned about, in particular in the Bachelor's numbers.

However, due to the low number of answers (only 8) to the student number questions, the error margin on this year's averages is very high.

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.

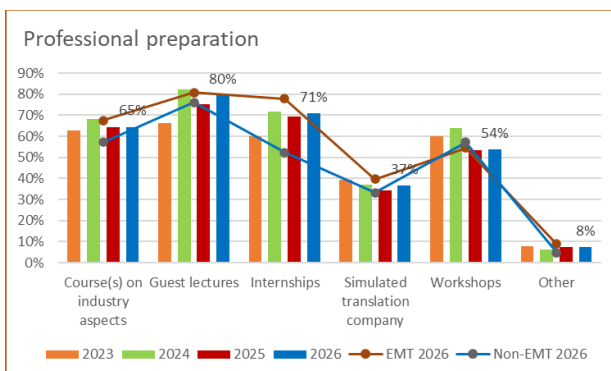


Figure 93 - Professional preparation in training programmes

Professionalisation activities are maintained at the same level as last year, with only a very slight increase in guest lectures.

EMT institutions show only slightly higher levels of professionalisation activity than non-EMT universities, except with regards to internships, which are reported by only 50% of the non-EMT participants compared to 70% of their EMT colleagues.

Internships

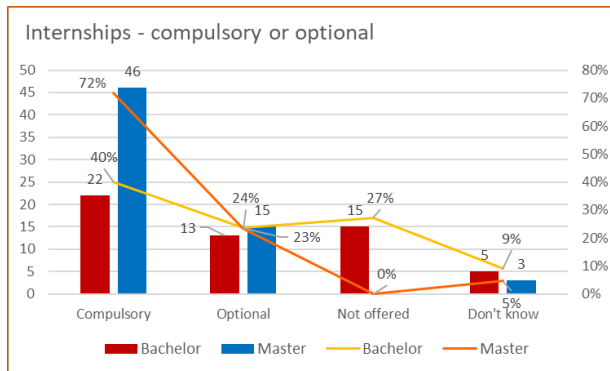


Figure 94 - Internships, compulsory or optional - university staff

Internships are definitely an integral part of the represented Master's programmes. 72% of the participants describe them as compulsory and another 23% as optional. Not a single participant indicated that they are not offered.

This is slightly different for Bachelor's programmes, as can be expected due to their more generic training scope. Here, 27% of respondents report that internships are not offered. Only 40% state that they are compulsory and 24% that they are optional.

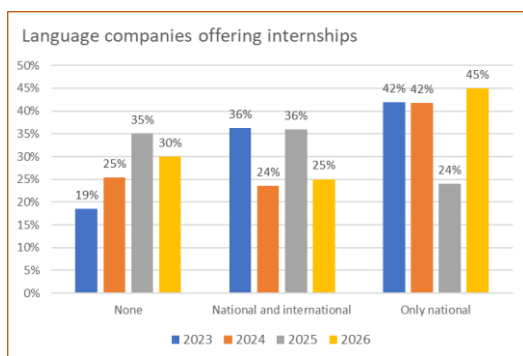


Figure 95 - Internships offered - language companies

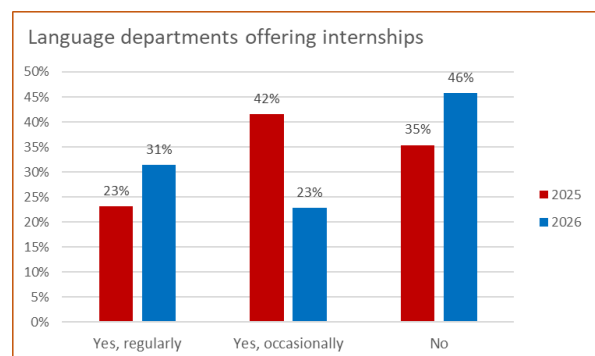


Figure 96 - Internships offered - language departments

While the internship support trends among language companies is not 100% clear, we do see some weariness creep in. Approximately 30% are not accepting any interns at all, mostly because they are lacking the work or the resources to support interns. Moreover, language companies are less eager to support international internships. This is most likely due to additional administrative burdens such as housing, insurance and permits, which small companies have difficulty to cope with.

ELIS 2026 depicts a worse situation in language departments. Although 31% state that they receive interns regularly, which is more than the 23% in 2025, 46% declare that they do not accept interns at all compared to 35% in 2025. This shift is particularly brutal in local public administrations, where 60% do not accept interns, compared to only 32% last year. Whether these figures reflect a real trend is unclear since the question was not part of the language department survey prior to 2025.

Students report a much higher internship satisfaction (64% vs 46% in 2025), while teachers ironically see a somewhat lower student satisfaction (54% vs 64% in 2025).

And despite lower employer eagerness to receive interns, teachers estimate that employer satisfaction with the internship outcome remains at similar levels.

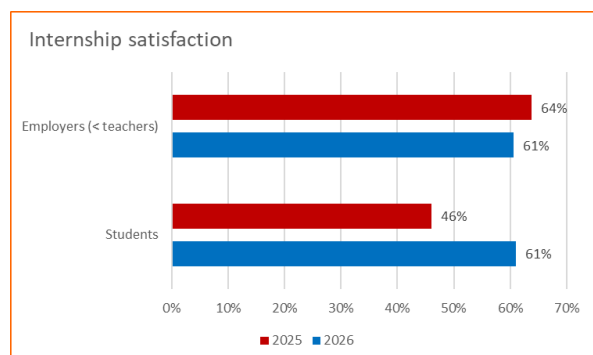


Figure 97 - Internship satisfaction

Whether the declining student numbers and the resulting easier placement (with well-known employers) plays a role in this sustained satisfaction level is unknown.

Based on the internship statement data, teachers seem to state that interns are adequately followed-up by the university but maybe not as thoroughly as the year before. Students on the other hand are satisfied with the follow up by their university, but even more with the support they receive from the employers.

Financial compensation remains a controversial topic, among others, as a result of national or university-specific regulations regarding potential financial compensation of in-curriculum internships.

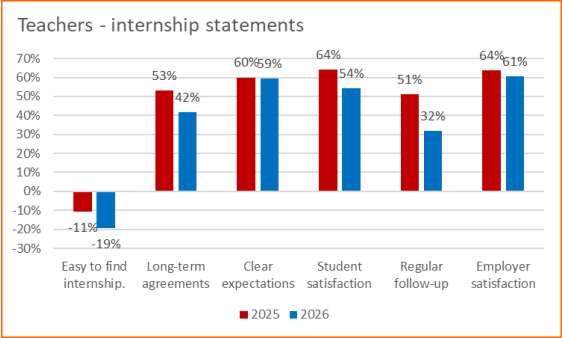


Figure 98 - Internship statements - teachers

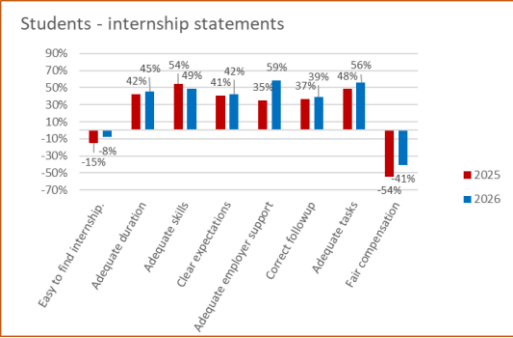


Figure 99 - Internship impact - students

ANALYSIS METHODOLOGY COMMENTS

Mid-point averages	<p>Many answer options represented a volume, revenue or percentage range such as “21 – 50%” or “2 – 5”.</p> <p>Averages of these answers have been calculated by using mid-point values: ex. “21 – 50%” is converted to “38%” and “2 – 5” becomes 3.5.</p>
Median vs average	<p>For a few questions, results are analysed using the median value instead of the typical average. 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, which can easily skew the arithmetic 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>The original formula “$(\text{Strong increase} * 2 + \text{Increase}) - (\text{Strong decrease} * 2 + \text{Decrease})$ divided by the number of responses” has been replaced by “$(\text{Strong increase} * 2 + \text{Increase}) - (\text{Strong decrease} * 2 + \text{Decrease})$ divided by the number of responses * 2” to turn the outcome (which could exceed 100) into a proper percentage.</p> <p><i>Don't know</i> answers are not taken into account.</p>
Investment mood	<p>$[\text{Investment in 2024} * 2 + \text{Investment later} - \text{Disinvestment later} - \text{Disinvestment in 2024} * 2] / \text{number of answers}$.</p> <p>Contrary to the formula for market evolution, the investment mood calculation has not been transformed into a percentage. Values above 1 are allowed.</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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