ELIS 2025 - EUROPEAN LANGUAGE INDUSTRY SURVEY

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

Trends, expectations and concerns of the European language industry

16:00	Welcome, housekeeping rules
16:05	Opening words by Christos Ellinides, Director-General for Translation, European Commission
16:20	Presentation of the ELIS 2024 results
17:20	ELIS 2025 discussion panel – what now?
18:20	Closing words by Heike Leinhäuser, president of EUATC

A Translating Europe Workshop

18th March 2025

ELIS 2025 Results

- Global market evolution & industry mood
- Segment-specific results
  - Language service companies
  - Language departments
  - Independent language professionals
  - University staff and students
  - Internships
- Conclusions

This presentation focuses on the highlights.

More details can be found in the ELIS 2025 report.

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ELIS 2025 – participation

1322 answers

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

50 countries

11 countries with representative numbers of language company answers

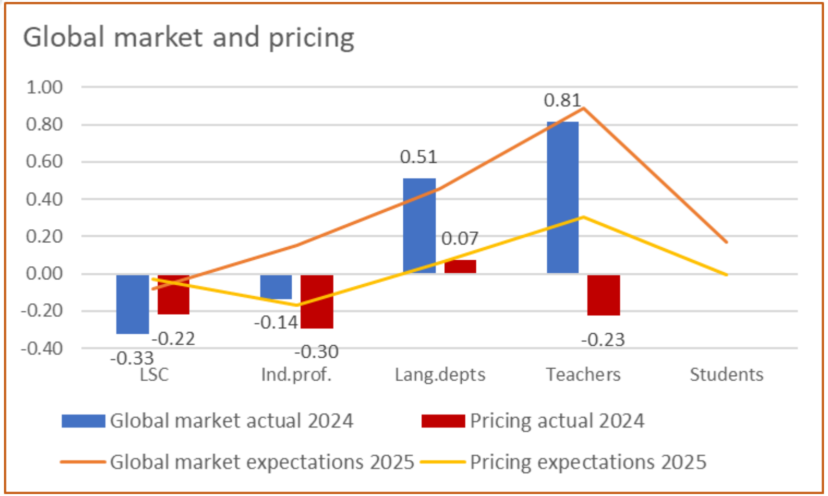
18 countries with representative numbers of language professionals

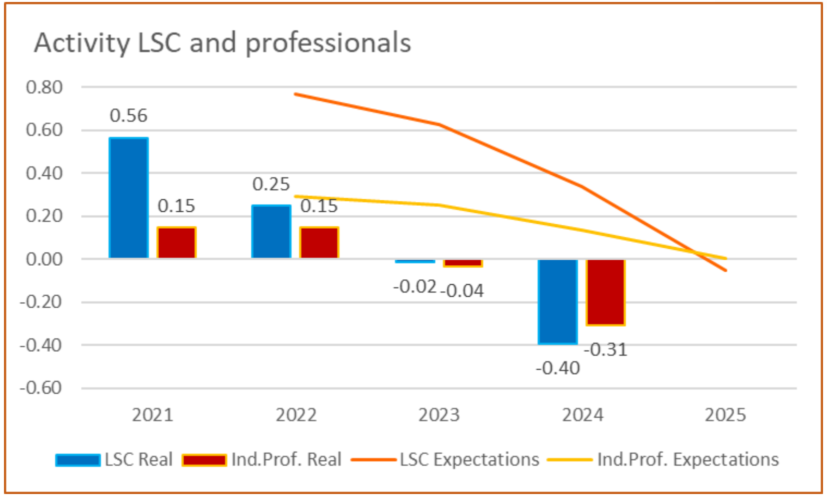
MARKET EVOLUTION

NOTE: except where indicated, scores show the difference between respondents reporting an increase and those reporting a decrease, as a measure of the market sentiment, and not the actual increase or decrease.

They are usually mapped on a scale of -2 (strong decrease) to +2 (strong increase).

Market – negative evolution deepens





Both language professionals and companies continue to report negative growth and are losing hope for 2025 as well.

For the first time since ELIS started, language companies expect this trend to continue not only in their own activity, but also in the global language market and even more strongly in their local market.

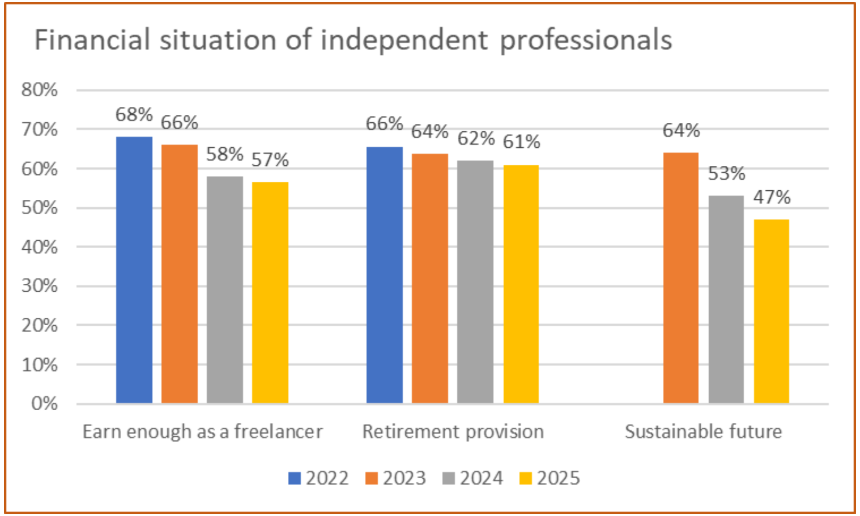
Language departments do not report this negative market evolution and continue – together with the teachers – to expect the market to grow and prices to increase.

Staffing, financial stability and language budgets are suffering.

Industry sentiment - not in the mood

Sentiment = (Investment score - disinvestment score) / Number of companies. 0 = neutral. Empty = no answers
Sentiment > 0,5 = Green. Sentiment < 0 = Red. Other = Yellow. Number of total responses below threshold = Grey.

	Owner answers	Investment	Disinvestment	2018	2019	2020	2021	2022	2023	2024	2025
Austria	10	8	1	0.67	1.30	0.70	0.30	0.89	1.50	0.50	0.70
Belgium	10	7	5	0.62	0.57	0.80	0.70	0.92	0.43	0.50	0.60
Croatia	1	0	1	0.53	1.07	0.20		0.38	0.00	0.00	-1.00
Czech Republic	3	6	0	1.40	1.20	0.50	1.00	1.33	1.00	0.67	1.67
Denmark	2	4	0	0.00	1.00	1.00	0.50	2.00	2.00	2.00	1.50
France	24	17	3	1.1	0.53	0.7	0.00	0.00	0.82	0.82	0.67
Germany	8	4	2	0.80	0.89	1.60	0.40	0.88	0.75	1.08	0.38
Greece	2	8	2	0.70	1.20	0.70	1.00	0.50	1.43	1.20	3.50
Hungary	10	6	3	1.00	0.88	0.70	0.00	0.67	0.62	0.78	0.50
Ireland	1	0	0						1.05	-2.00	-1.00
Italy	25	13	2	0.91	0.76	1.30	1.00	0.47	0.29	0.58	0.48
Lithuania	2	1	0		0.71	0.80	1.20	1.20	0.89	-0.33	0.00
Netherlands	5	4	0	1.27	1.42	1.00	0.90	0.75	1.00	0.29	0.60
Poland	5	1	2	1.00	0.80	0.40	0.00	0.70	1.50	0.89	0.00
Portugal	15	4	6	0.92	1.18	1.00	0.70	0.44	-0.50	0.70	0.20
Romania	3	2	0	0.71	0.43	1.00	1.20	1.00	1.00	1.00	0.33
Russia	2	2	0	2.00	0.86	2.00	0.60	1.00	1.60	1.00	0.50
Serbia	2	2	0						0.54	0.00	0.50
Slovak Republic	4	4	1	0.60	0.67	1.00	1.00	1.00	1.75	0.67	0.75
Slovenia	6	4	0	1.36	1.44	0.90	0.20	1.17	2.00	0.60	0.50
Spain	16	20	3	0.76	0.56	0.70	0.10	0.47	0.50	0.27	1.19
Ukraine	1	0	0	2.00	2.00		2.00		0.97	1.33	-1.00
United Kingdom	13	10	2	0.53	1.10	0.80	0.80	0.74	0.60	0.87	0.69
			Country average	0.94	0.98	0.89	0.68	0.84	0.94	0.58	0.53
			Weighted average	0.85	0.89	0.89	0.57	0.77	0.88	0.66	0.61



LSC investment mood is at its lowest level since 2018 (but lower number of answers makes total mood average less reliable).

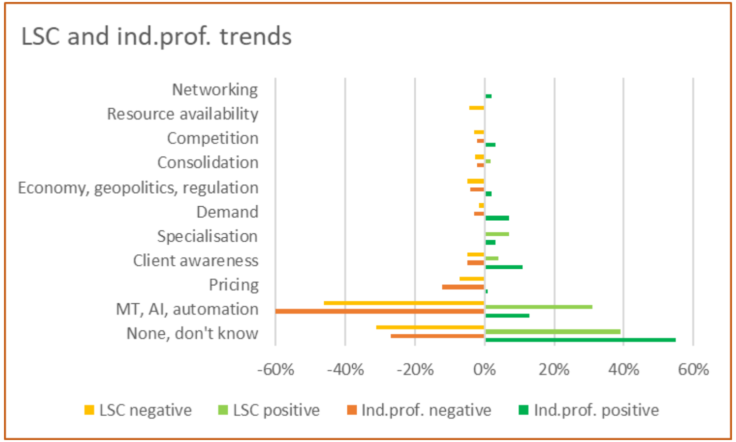
M&A sentiment has not dramatically changed – more LSC respondents are interested in selling than in buying. Intentions also translate into action: 12 respondents are involved in an M&A transaction.

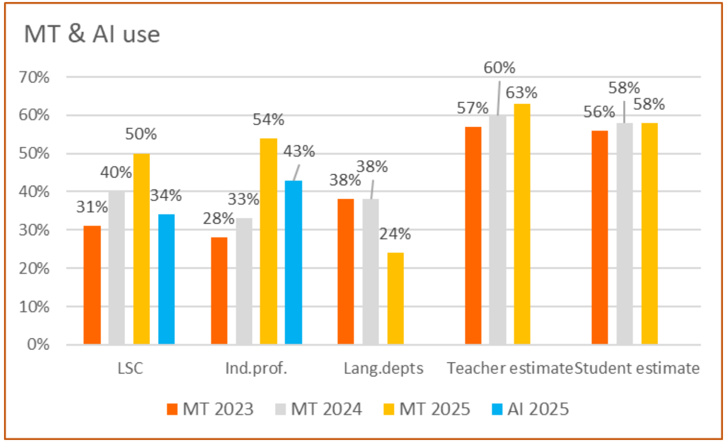
Only 58% of LSC respondents (70% business owners) are satisfied with their own income levels.

The financial position of independent language professionals continues to deteriorate. Only 57% of respondents earn enough as a freelancer. Interpreters are reporting the biggest drop: from 80% in 2022 to 65% this year.

Confidence in long term sustainability of the freelance career has dropped dramatically across all seniority classes.

Industry trends and technology converge





Only one real trend: the rise of AI, MT and other technologies. Many see it as a means to make their own work more efficient, but most respondents blame it for replacing human translation by post-editing, causing rates and quality to collapse, and language professionals to quit the profession.

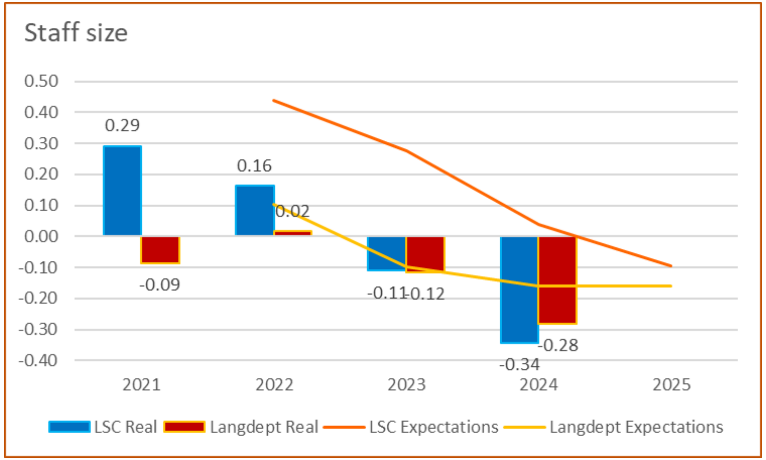
One seasoned translator describes the trend as follows: "*There's a knock-on effect where the economic slowdown affects my end clients, who then want to reduce their costs and see translation as an area where they can save money by using AI. Ultimately, they are sacrificing quality, but sadly this seems to be the direction of travel right now.*"

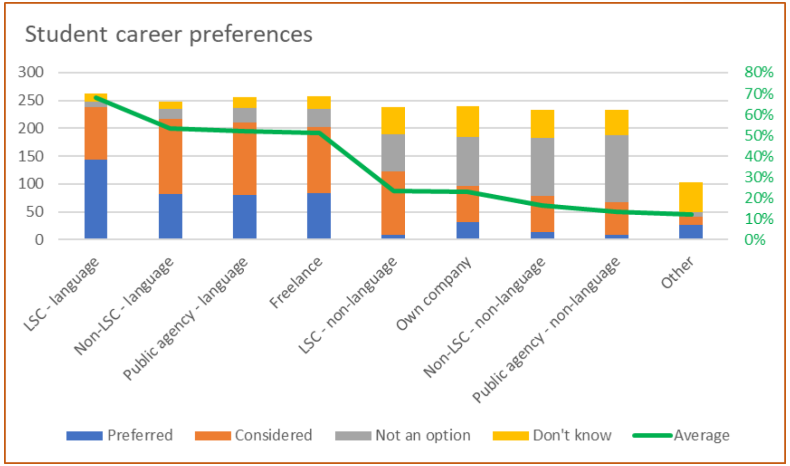
Language departments have a more neutral view. They recognise the issues that affect language providers, but point out that these technologies help them meet their organisation's requiremens.

44% of university staff report that Gen AI is already implemented in their institute. According to student replies however, usage is barely occasional.

For the first time, actual MT usage exceeds the 50% mark among independent professionals and language companies.

Is a career in the language industry still a smart choice?





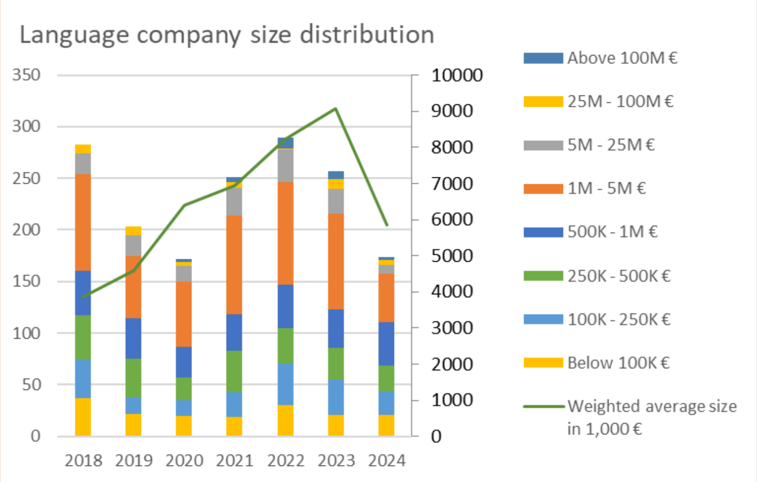
As before, students are mainly aiming for a language-centric career, with a slight preference for language companies. Unfortunately the staffing outlook does not look bright. 2024 staffing levels decreased both in language companies and in language departments, and the expectations for 2025 are not much better.

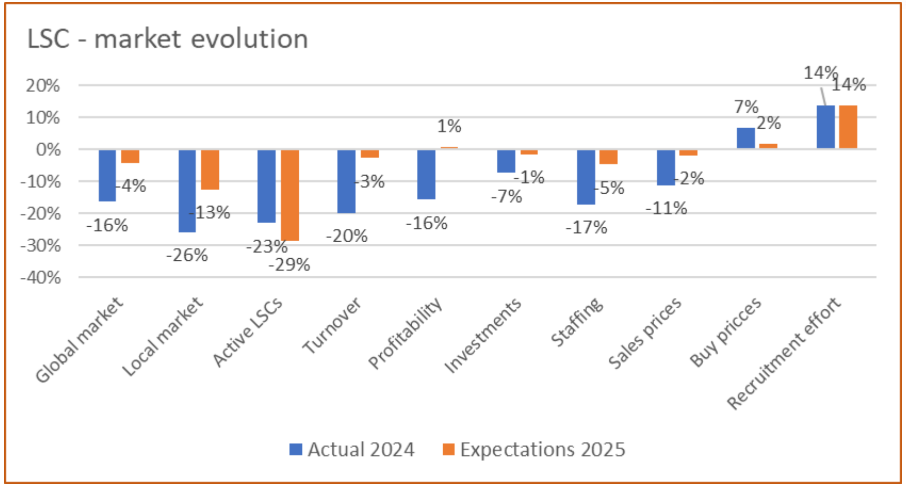
26% of LSCs still foresee recruitment of standard language roles, but most expect recruitment to take place in language data and AI, sales and marketing.

Stepping into the language industry today therefore requires a strong stomach and determination, based on firm personal choices and a set of skills that are in line with the industry developments: tech-savviness, specialisation, and an extreme focus on quality and client service to make the difference.

LANGUAGE SERVICE COMPANIES

LSC size and performance

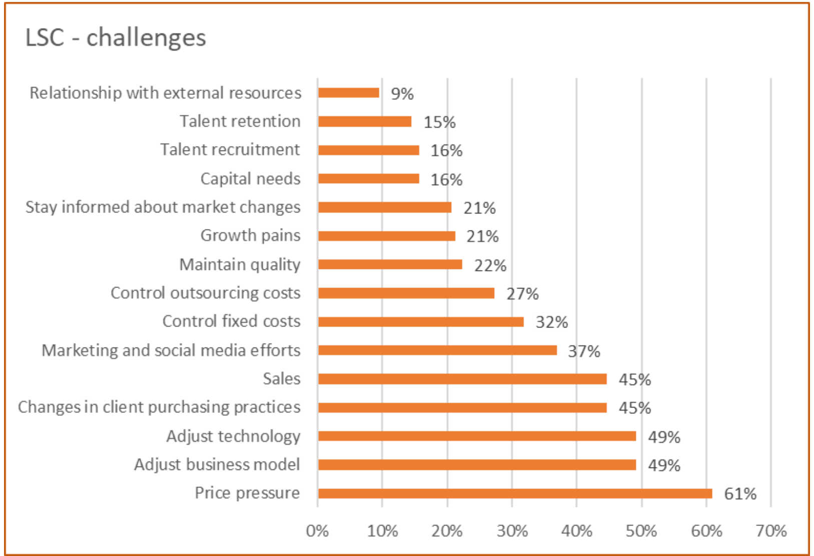


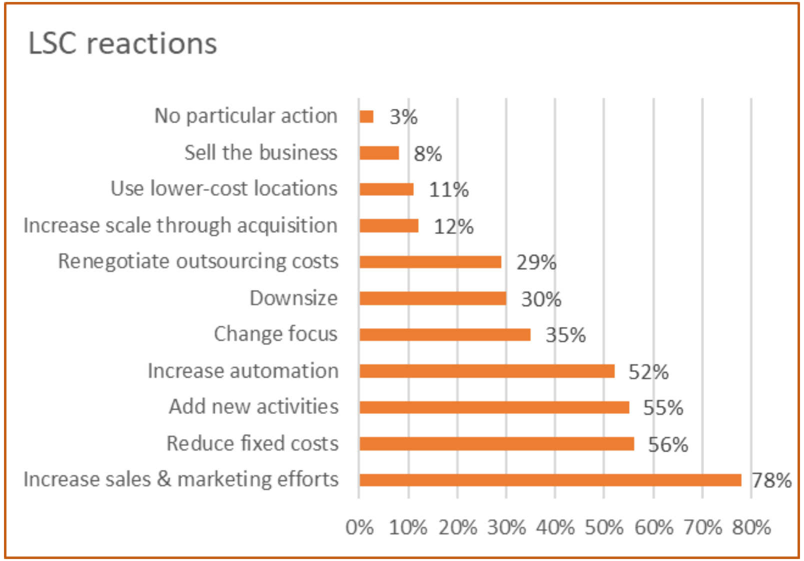


For the first time, the average weighted size of participating language companies has gone down. 90 LSC respondents reported a decrease in revenue, by an average of 19% (median 15%). Only 33 reported an increase, by an average of 16% (median 8%).

The negative mood is visible in their own performance, but also in their opinion about the global and more strongly their local language market. This evolution translates into negative figures for staffing and investment, as well as an expected strong decrease in the number of language companies in the market.

Challenges and reactions



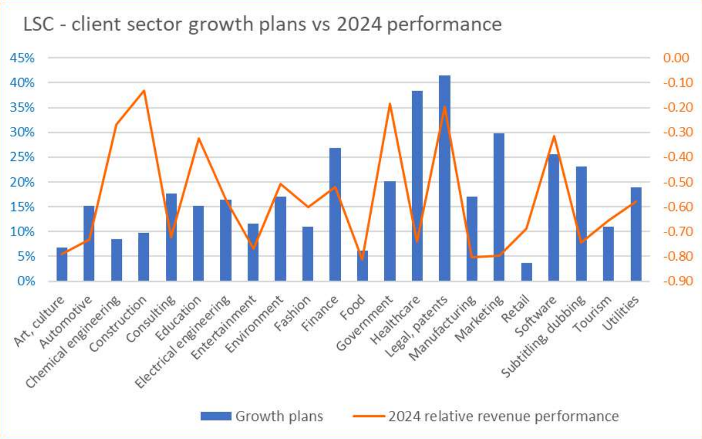


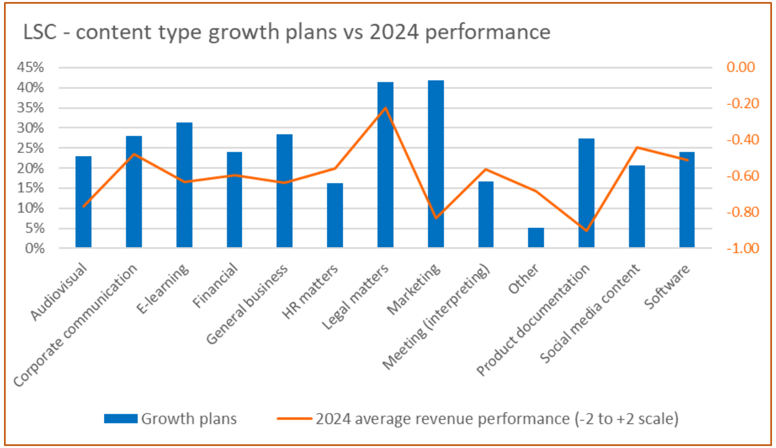
LSCs are increasingly worried about how to respond to new challenges such as changes in technology and business model or in the way that clients are purchasing their services.

Participants predict a radical transformation of the industry, primarily led by AI and automation. Traditional translation services will shrink and small agencies and freelancers may struggle, while large corporations and highly specialized professionals will likely thrive in niche areas.

Despite this prediction, respondents keep relying primarily on traditional methods such as increasing sales efforts and cutting costs to address the issue. Adding new activities and/or are changing the company focus will take time to produce results.

Growth plans vs performance





Companies plan growth mainly in areas that are already important to them.

Growth plans are not always in line with the 2024 performance (average percentage of business vs revenue performance) and are not always realistic looking at the historic track record.

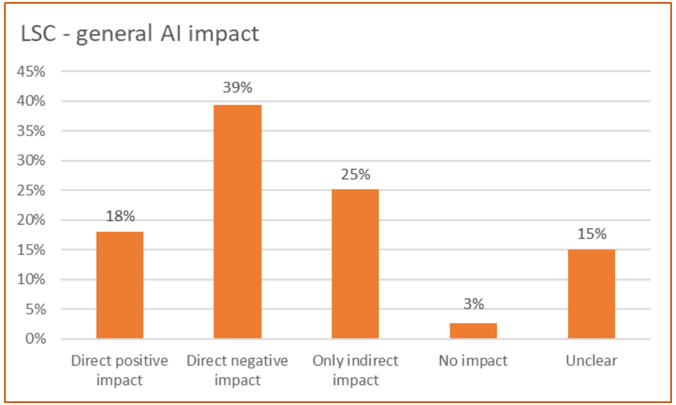
Post-editing is the strongest growth target, but booked the worst performance of all service types in 2024.

National business is even more important than before, but brought poor performance.

Software and social media content are favourite growth targets in 2025, but strategic types such as corporate communication and legal performed far better.

Companies with a high ratio of large direct client business performed better. The opposite is true for those working a lot with large language company clients.

AI in language companies

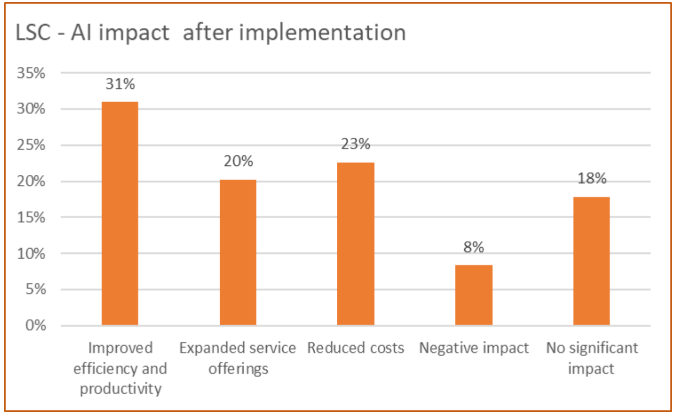


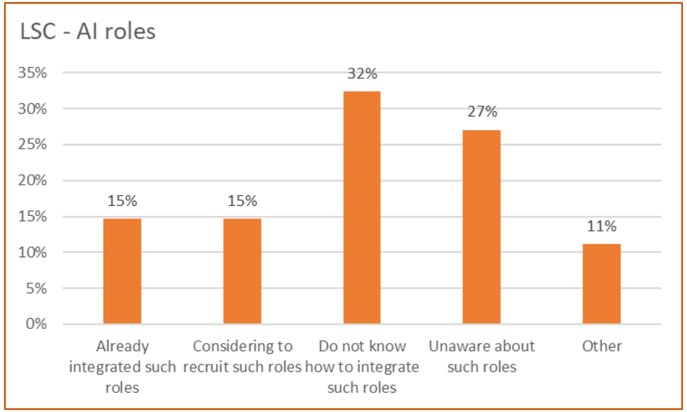
In general, 65% of the respndents report a negative impact of AI, mostly direct but also indirect as a result of client uncertainty.

The feedback from those who already implemented AI in their business is largely positive, thanks to improved efficiency, cost savings and new service offerigs. Some respondents however also report a negative impact mainly due to the application of lower rates.

Typical AI roles are still widely unfamiliar, even to almost half of those who have already implemented the technology.

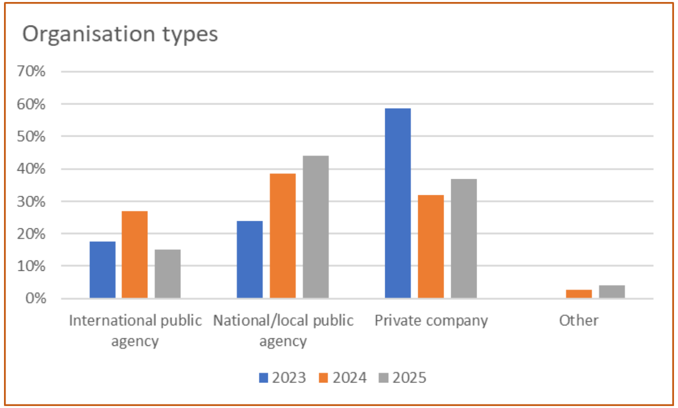
AI for non-language purposes remains largely work in process. Only 25 participants have implemented it, mainly for communication and marketing.





LANGUAGE DEPARTMENTS

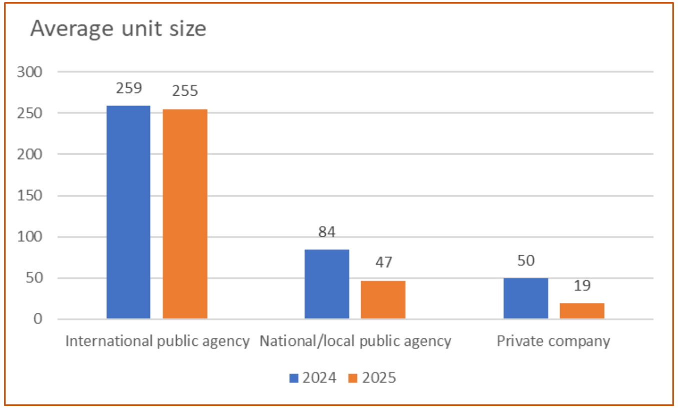
Structure

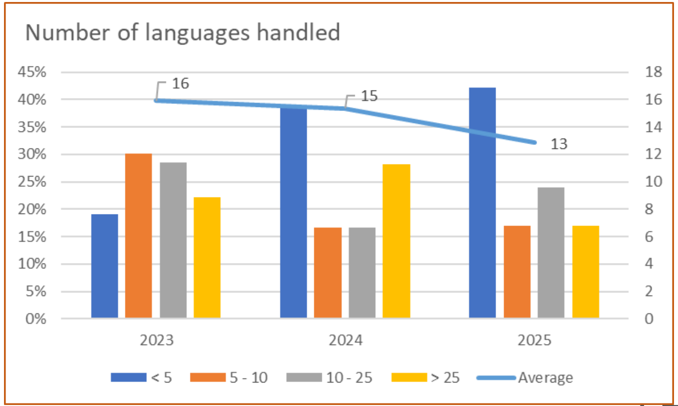


The average unit size dropped from 128 to 82, partly because of a different organisation mix (less international agencies and more national agencies) but also due to a dramatic downsizing (-50%) in national public agencies and private companies.

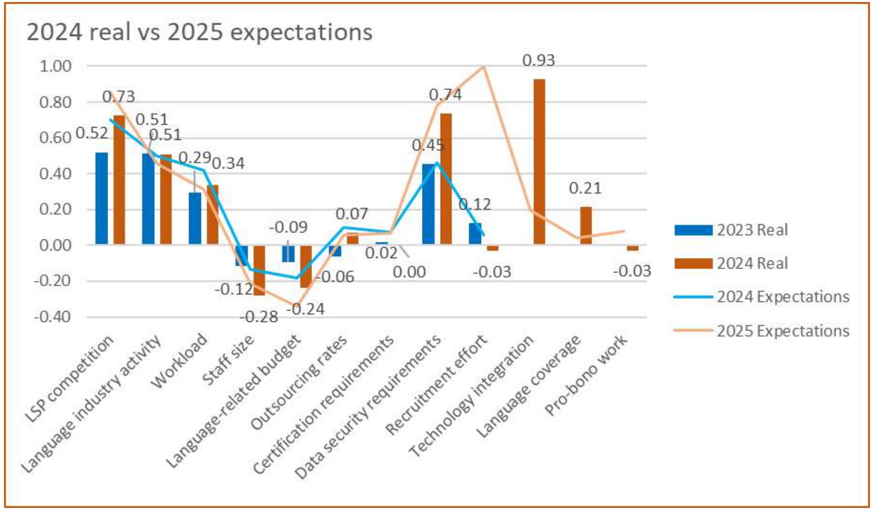
International public agencies reported lower language numbers (13 vs 24 in 2024). This merits more investigation since the market evolution data show the opposite.

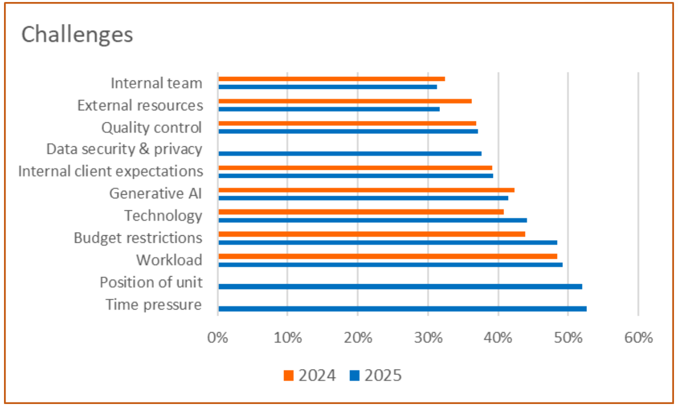
Language matters are often not owned by one single unit. This is the case in half of the participating organisations, both companies and public agencies (more so in national than in international agencies). This may be partly why the position of the unit within the organisation is seen as a major challenge.

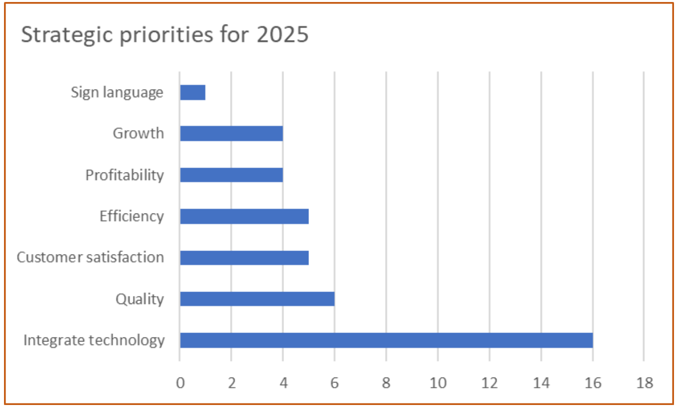




Evolution and challenges







Staff size and language budget are dropping and are expected to decrease further in 2025. Both were already flagged as important challenges in 2024, but are even stronger this year.

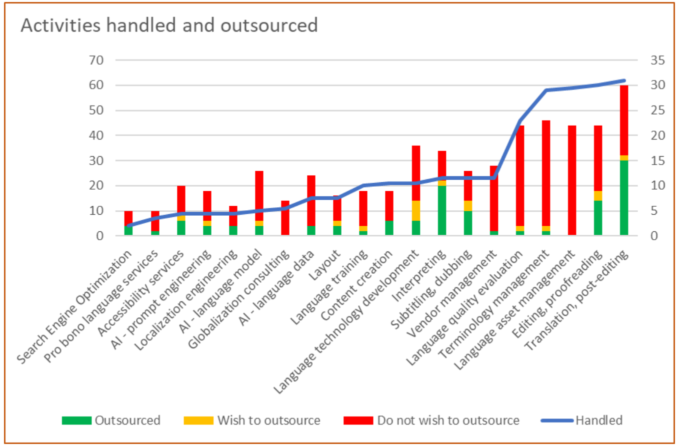
Data security was a hot item in 2024.

Recruitment is expected to be particularly challenging this year.

As expected, technology integration (MT and AI) was a strong focus in 2024, and is also named as a strategic priority for 2025.

A Translating Europe Workshop

Outsourcing and other operational practices

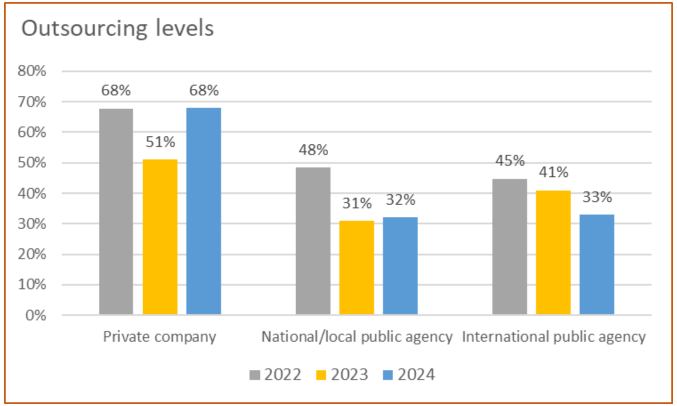


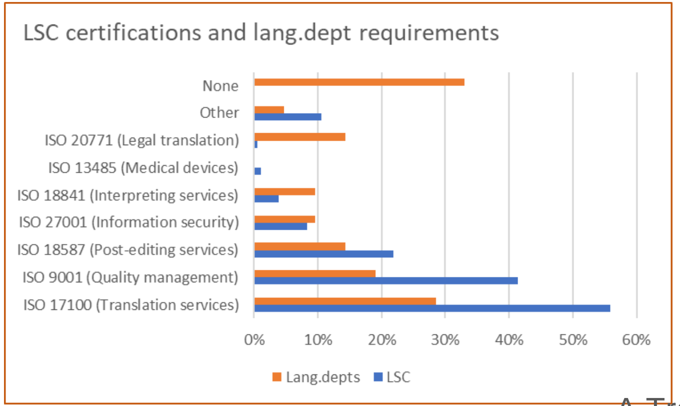
Overall outsourcing remained constant in 2024, both in average percentage and in the way it is handled. Based on the data, average outsourcing continues to decrease in international public agencies but returns to 2022 levels in private companies. Outsourcing practices are not expected to change dramatically. Further consolidation is the only trend that is fairly clear.

Certification has become less of an item. Only 29% of the respondents require ISO 17100 certification and 33% do not require any certification at all.

Only 11% of participants provide external resources with raw MT output, while LSCs report that 27% of their work is post-editing of pretranslated content.

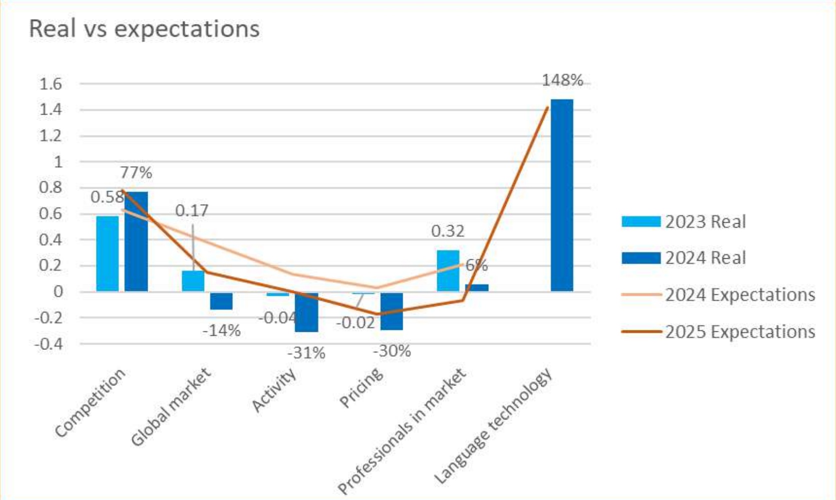
Gathering internal customer feedback is not (yet) generalized. 30% of respondents do this regularly and 31% occasionally.

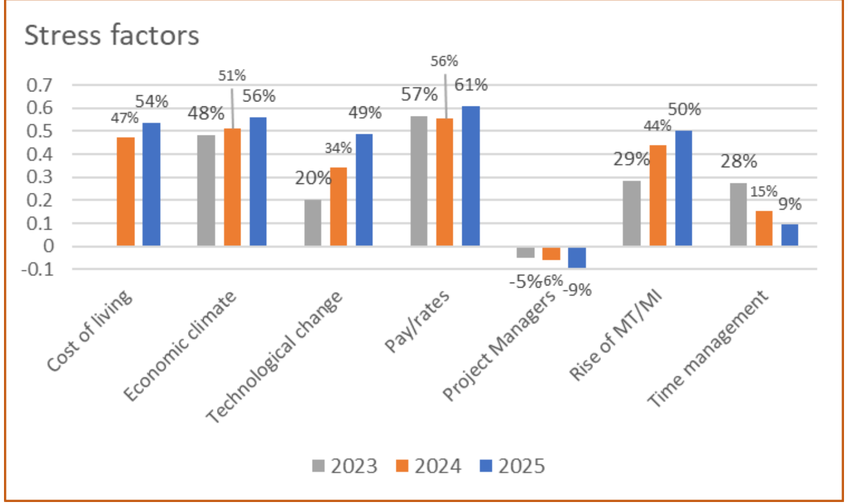




INDEPENDENT LANGUAGE PROFESSIONALS

Performance and stress factors





All market parameters continue to decline, though independent professonals are a bit less pessimistic than language companies with regards to the development of the global market. Pricing is another matter, where individuals expect a further erosion in 2025.

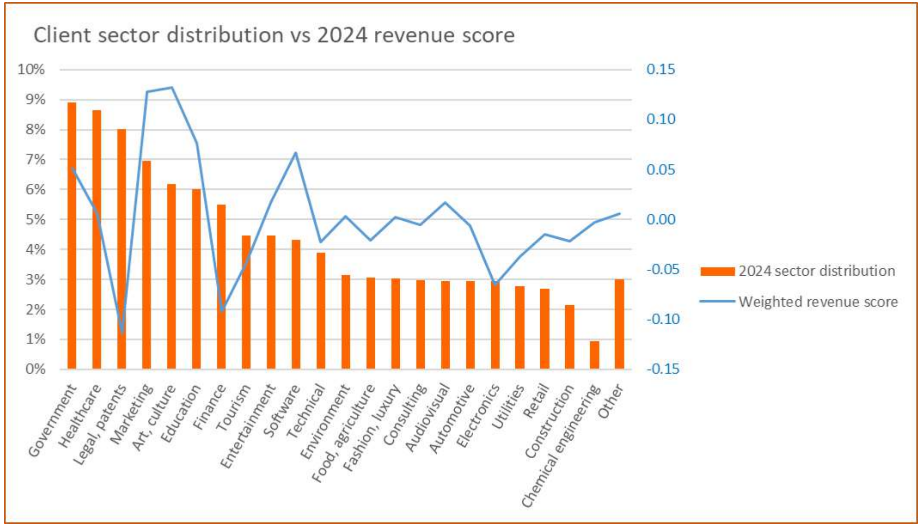
Pricing is at the heart of the freelancer’s frustration, but all main stress factors continue to increase, leading to an alarming level of frustration and anxiety and a sense of lack of control..

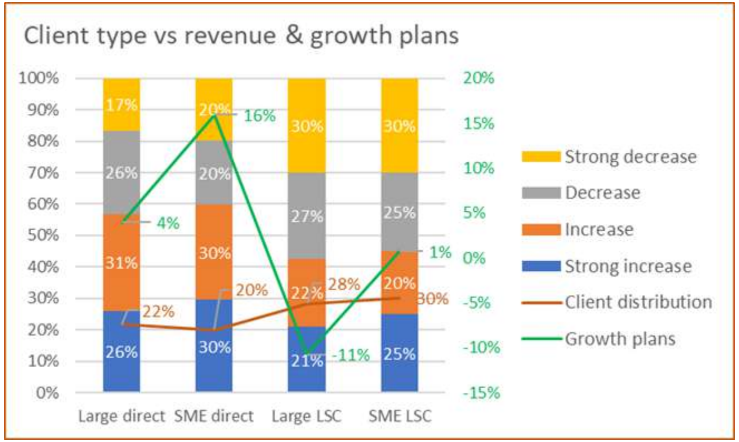
Rates continue to be the most prominent stress factor which is closely linked with cost of living and general economic uncertainty.

Respondents are mainly trying to respond to the situation by acquiring new skills and developing other activities, which are probably more effective in the long term than merely increasing sales and marketing activities.

Unfortunately, 23% of respondents are considering to end their independent language activity.

Client sectors and negotiations



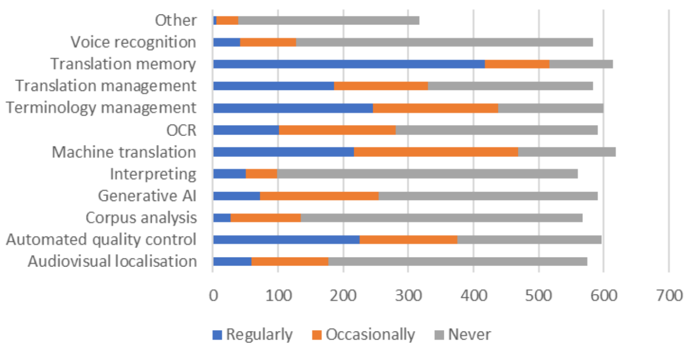


Participants rely less on technical sectors and more on some that are much less covered by LSCs, such as culture,literature and education. A focus on these sectors seems to result in a higher revenue score (increase vs decrease), contrary to usual ‘trusted sectors’ such as legal and finance.

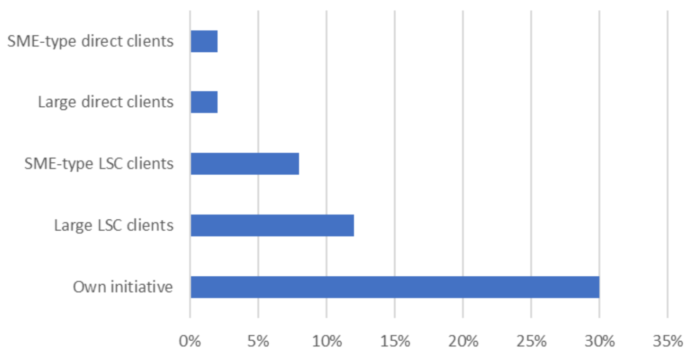
There is an obvious correlation between client type and performance. SME-type direct clients were the best bet in 2024, not only for activity but also for negotiating conditions (*see details in the ELIS 2025 report*). Working with large LSCs was the least rewarding.

Technology

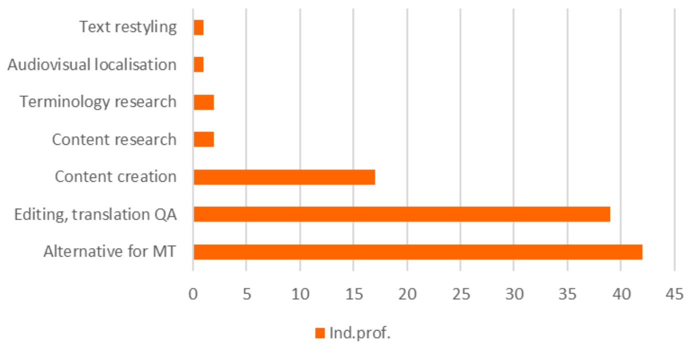
Technology use



MT usage - whose choice?



Gen AI tasks



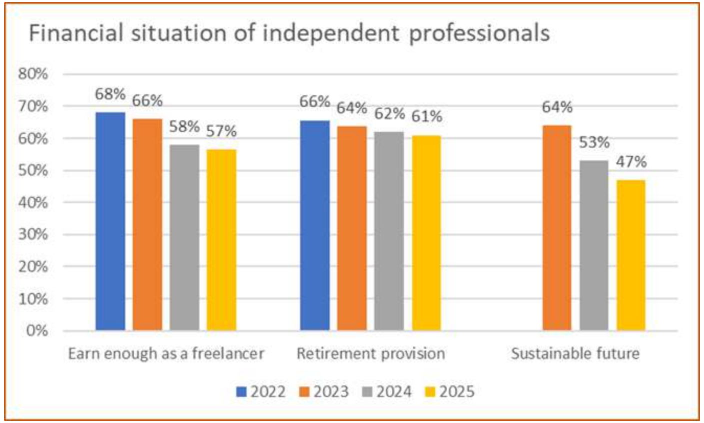
Technology implementation has not significantly changed compared to previous year.

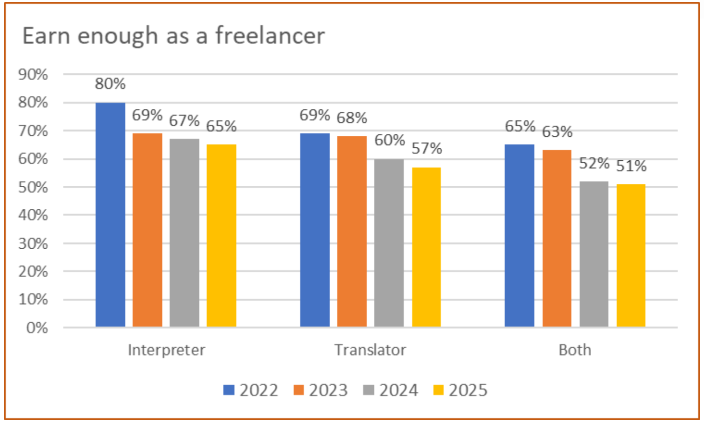
Actual usage of MT continues to grow. It is now used in 54% of projects. In most cases however, the reported use is not mandated by the client but a personal choice of the professional.

Direct clients are much less inclined to request the use of MT than language companies (especially the large LSCs).

AI is mainly used as a translation or editing tool, but 40% of the active users are using it also for content creation.

Finances & career





Concern about their financial situation and the sustainability of their freelance activity has been growing year after year, in line with income and price developments. This evolution is consistent across genders, age segments and types of activity.

Interpreters continue to report better situations than translators and mixed profiles, but are suffering nevertheless, especially taking into account that interpreters are less likely to work part-time.

Work-life balance does not seem to degrade further. At 54% satisfaction however, freelancers score substantially lower than employees.

The need to be always available to jump on each opportunity due to the lower number of projects is one of the reasons why independent professionals feel an increasing lack of control over their own professional situation.

Wrapping up : what’s wrong and how can we react ?

Issue

- Indiscriminate use of AI/MT
- Lower work volume
- Unfair rates
- Conditions dictated by large LSCs
- Experienced professionals leaving the market

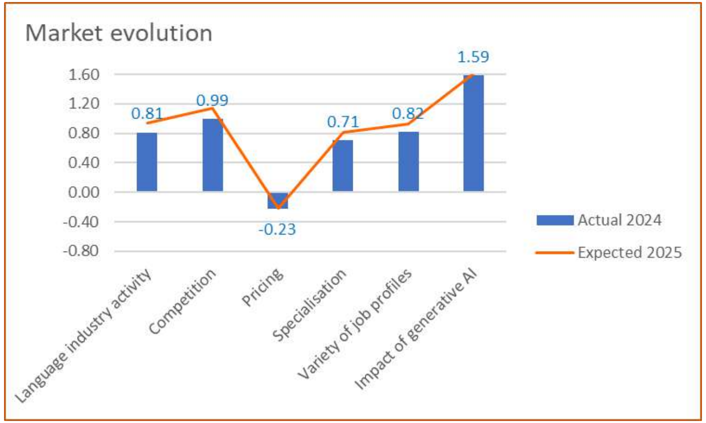
How can you react?

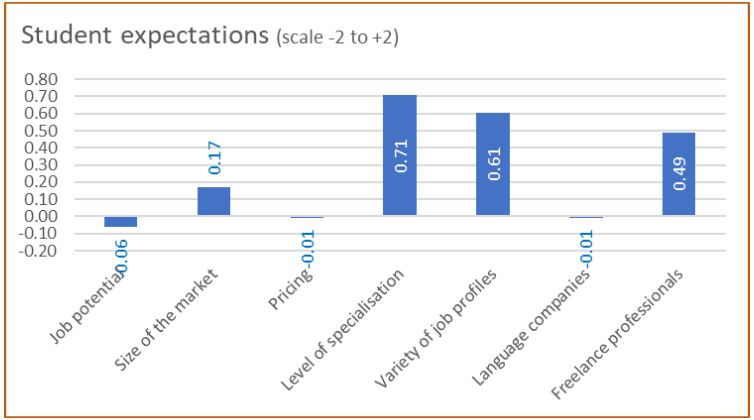
- Focus: direct clients, niche sector, ...
- Set boundaries: rates, deadlines, ...
- Hone professional skills: financial planning, time management, ...
- Diversify income streams
- Network, collaborate
- Use technology to become more efficient
- ...

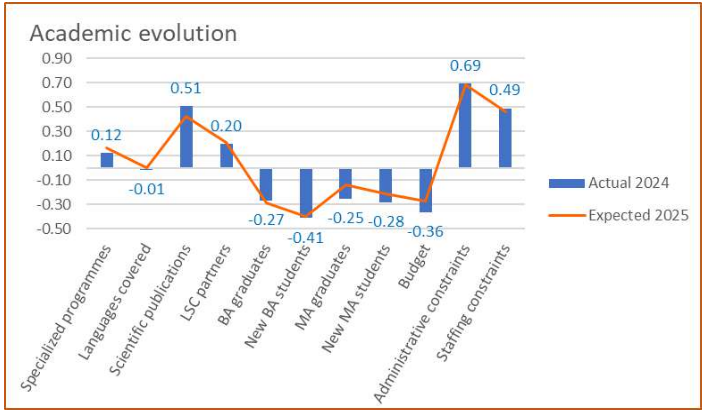
But you cannot do it alone...

UNIVERSITY STAFF AND STUDENTS

Evolution and expectations





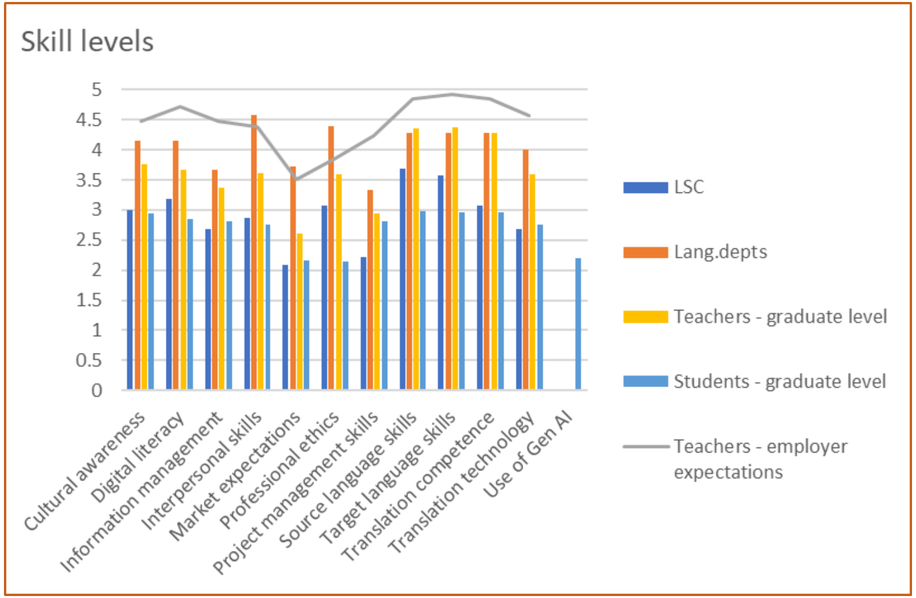


As in 2024, university staff have a more optimistic view of the market evolution than other stakeholders, in particular with regards to market growth and pricing. Unfortunately the current industry data do not support this expectation.

University staff report the same if not worse academic evolution as in 2024. Especially the waning number of new students causes concern.

The challenges remain largely the same as in 2024, with visibility of the profession and budget restrictions in the lead. Students are mainly concerned about their professional future, but finding internships is also an issue. (*details in the ELIS 2025 report*)

Skills



Language departments are more positive about graduate skill levels than language companies.

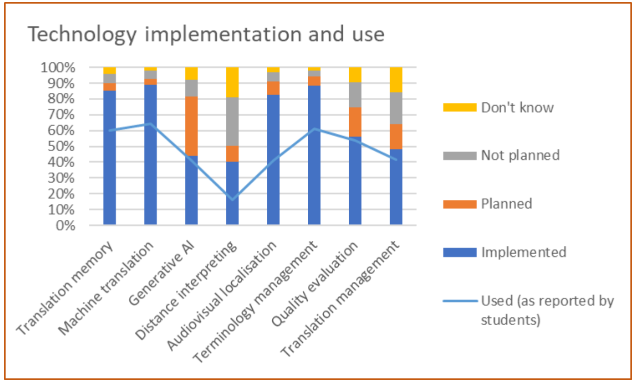
Teacher scores are more in line with those of language departments, while student scores are remarkably close to those of language company participants.

Teacher opinions about employer expectations match to a large extent the skill levels reported by language companies and departments. This is an indication that translations programmes are focusing on the right skills.

Language companies score translation technology skills considerably higher than in 2024, although there is still room for improvement.

Project and information management score lower than average across all segments. This is reason for concern since these two skills will become ever more important in the changing language industry.

Technology and professionalisation



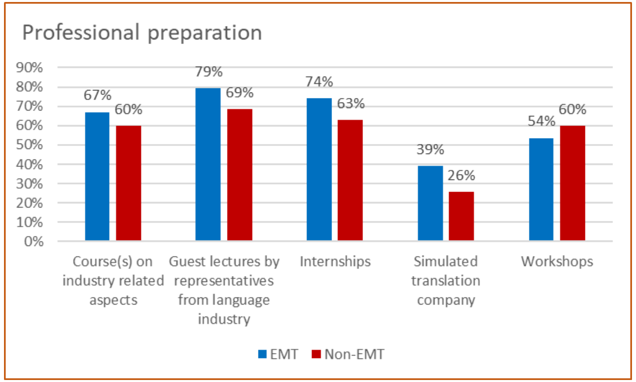
All main types of language industry technologies are extensively implemented in the participating training institutes.

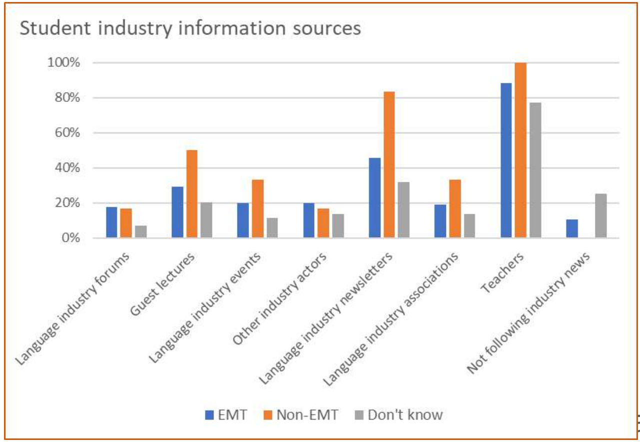
44% of university staff report that generative AI is implemented, but students indicate that it is used only occasionally.

Implementation of technology is consistently higher in universities belonging to the EMT network, with the exception of distant interpreting.

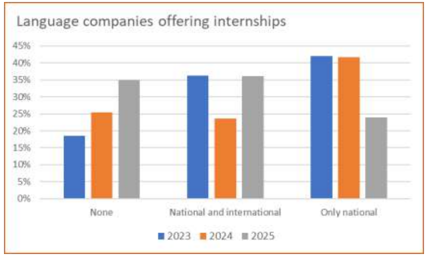
University staff data show a similar EMT vs non-EMT difference in professional preparation activities, but this difference is contradicted by data provided by students (*Note: only 6 student replies from non-EMT institutes*).

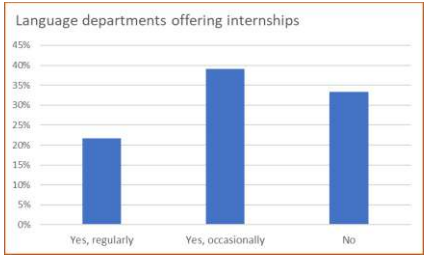
One clear conclusion: students rely massively on their teachers for information about the language industry.

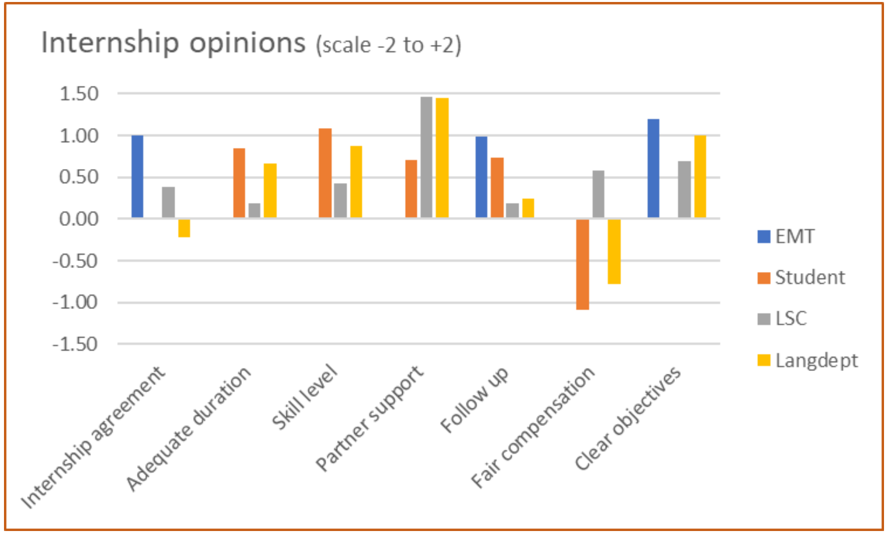




Internships







Although internships are widely considered an important part of the translation or interpreting programme and an effective recruitment channel, finding suitable internship remains a challenge for students and teachers.

One third of participating language companies and language departments do not accept interns and another third does not accept international interns, often motivated by a lack of suitable work or support, but also due to regulatory restrictions.

The different internship actors do not always agree about specific topics, such as structural agreements, duration or financial compensation.

They do however agree that internships are a positive and meaningful experience.

This is further confirmed by the more realistic language market view shown by students who carried out an internship.

The ELIS 2025 report contains a complete section on internships.

CONCLUSIONS

What do the ELIS 2025 answers tell us ?

- Language industry experiences a structural change.
- Balance between technology and human services is broken.
- Small language companies and professionals are hit particularly hard
- Language departments and universities are more positive but feel the impact too.
- Students are realistic

And what about the language industry associations? What are they doing?

What can associations do ?

What are language providers looking for?

- Guidance. How should/can they react to the changes?
- With whom can they work together? Networking and cooperation become life-savers, instead of nice to haves.
- Information and support to re- and upskill, develop new activities, change service focus.
- Clear and fair rules of the game.

Associations can and do help

- AI webinars (also for clients) and continuous training programs
- Opportunities for networking and collaboration
- Cross-segment agreements to create win-win collaborations
- Assist policy makers to create a sustainable framework for the industry

ELIS survey partner websites

euatc.org	EUATC (European Union of Association of Translation Companies)
elia-association.org	Elia (European Language Industry Association)
gala-global.org	GALA (Globalization And Localization Association)
fit-europe-rc.org	European regional centre of the International Federation of Translators
ec.europa.eu/info/resources-partners/european-masters-translation-emt_en	EMT (European Master's in Translation) network
ec.europa.eu/info/departments/translation_en	European Commission - DG Translation (Lind group)
womeninlocalization.com	Women in Localization

A special thank you to

Student translators: Adriana Giménez Maján, Ana Isabel Cuesta Mateos, Ana Martínez Soto, Andrea Carmona Mula, Cecilia Brighittini, Celia Blázquez, Emma Martín Heredia, Jennifer Di Bonaventura, Lea Flora Faensen, Romane Bodart, Sara Sedano Macho,Tom Kannenberg

Language companies: Amidas, ASAP, Bellcrest, Espell, Explika, Hermes, Inpokulis, Logrus, MPÜ, Rapitrad, Stoquart

Interpreters: Alessandro Di Donfrancesco, Cedrid Stiers, Juan Luis Cobano, Ludovic Classe, Pauline Tagwerker, Sofia Conesa, Mark David Mathias, Tatjana Roos,

who post-edited ELIS survey forms and assisted us in this presentation

This presentation and the ELIS 2025 report can be downloaded from the elis-survey.org repository (registration required)

Comments and suggestions are welcome at research@elis-survey.org

ELIS 2025 discussion panel – what do the results mean for the industry ?

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