



# ELIS 2022

LANGUAGE INDUSTRY SURVEY



## EUROPEAN LANGUAGE INDUSTRY SURVEY 2022

Trends, expectations and concerns of the European language industry

ELIS Research  
[research@elis-survey.org](mailto:research@elis-survey.org)

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-organised 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 & concerns, challenges and obstacles, as well as changes in business practices. It is open to language service companies (LSC), independent language professionals, training institutes, language service buyers, as well as private and public translation departments.

ELIS consists of 4 separate surveys, built around a common core but tuned to the needs and interests of their respective industry segment.

The 2022 edition received 1342 responses, the 2<sup>nd</sup> highest return in ELIS' history:

- 264 language service companies

- 745 independent language professionals

- 263 representatives of training institutions and students

- 70 language departments and language service buyers

ELIS 2022 was the first edition to use the EU Survey platform. Language service companies and independent language professionals piloted the platform's multilingual capabilities, including the EU's e-Translation NMT facility, to make their surveys available in multiple languages (16 for the language company survey and 10 for the independent professionals survey).

22% of the language company participants and 13% of the individual professionals completed the survey in one of the translated versions.

2022 is a particularly important edition. It marks the transition from 18 months of epidemic-related disruption to a *new normal* in the way people around the world live and do business. This edition therefore tries to identify if and how the industry has reacted and recovered from the Covid ordeal, and if the expectations expressed in ELIS 2021 have come true.

## Segment and country distribution of answers

Table 1 below shows between square brackets the minimum number of responses from companies and individual professionals that has been defined as a reliability threshold for each country. Countries that exceed the threshold are highlighted in green. Countries that are highlighted in yellow or grey delivered more resp. less than 50% of the threshold. Data from these countries should be analysed with caution.

	Companies	Individuals	Buyers & lang depts	Training institutes
TOTAL	264	745	70	263
<b>Europe</b>				
<b>Central &amp; Eastern Europe</b>				
Albania	1 [5]	1 [10]		1
Bosnia and Herzegovina	[5]	1 [10]		
Bulgaria	[5]	11 [10]	1	14
Croatia	26 [5]	18 [10]		2
Czech Republic	7 [5]	17 [10]		28
Hungary	7 [5]	19 [10]		2
Macedonia	[5]	[10]		
Montenegro	1 [5]	[10]		
Moldova Republic	[5]	[10]		1
Poland	11 [5]	6 [10]		4
Romania	2 [5]	10 [10]		2
Russia	15 [10]	2 [20]		
Serbia	1 [5]	1 [10]		
Slovak Republic	6 [5]	10 [10]		3
Slovenia	7 [5]	19 [10]		5
Turkey	1 [5]	[10]	1	
Ukraine	[5]	[10]	1	

Table 1 - Responses per segment and country

	Companies	Individuals	Buyers & lang depts	Training institutes
<b>Northern Europe &amp; Baltics</b>				
Denmark	3 [5]	5 [10]	1	
Estonia	4 [5]	3 [10]	1	5
Finland	6 [5]	11 [10]	4	2
Latvia	4 [5]	8 [10]		1
Lithuania	5 [5]	7 [10]		19
Norway	[5]	3 [10]		
Sweden	3 [10]	[20]	1	3

<b>Western &amp; Southern Europe</b>				
Austria	10 [10]	46 [20]	4	41
Belgium	16 [10]	34 [20]	6	12
Cyprus	1 [5]	[10]		
France	2 [10]	75 [20]	8	21
Germany	16 [10]	94 [20]	7	8
Greece	4 [5]	29 [10]	4	17
Ireland	2 [5]	33 [10]		2
Italy	18 [10]	46 [20]	4	11
Luxembourg	[5]	4 [10]	12	
Malta	3 [5]	1 [10]		
Netherlands	12 [10]	32 [20]	2	3
Portugal	17 [10]	38 [20]	6	29
Spain	22 [10]	81 [20]	4	18
Switzerland	2 [5]	5 [10]		
United Kingdom	20 [10]	59 [20]	1	

	Companies	Individuals	Buyers & lang depts	Training institutes
<b>Americas</b>				
Argentina	[5]	1 [10]		
Brazil	1 [10]	[20]		
Ecuador	[5]	1 [10]		
Peru	[5]	[10]		1
USA	5 [10]	7 [20]	1	

<b>Africa, Asia &amp; Oceania</b>				
China	1 [10]	[20]		
India	1 [10]	[20]		
Kazakhstan	1 [5]	[10]		

Table 1 (Cont'd) – Responses per segment and country

# INDUSTRY INFORMATION, AFFILIATION AND CERTIFICATION

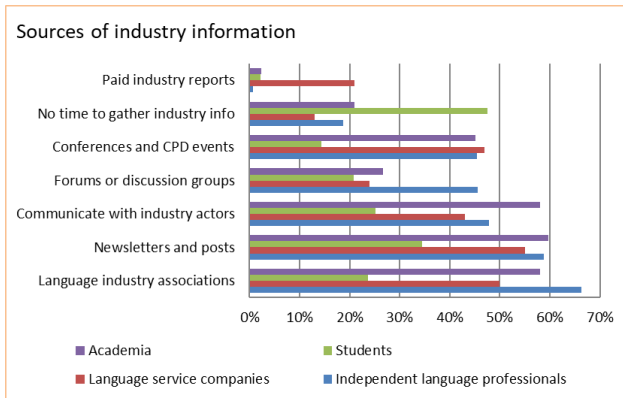


Figure 1 - Sources of industry information

Contrary to independent professionals, LLanguage companies hardly use forums as a source of information.

The high score of language industry associations is flattering, but biased since ELIS is organised by these associations.

Students should be encouraged to seek industry information.

Independent professionals see mainly a lack of information about market and competition, but also for standards, regulations and industry-specific training the availability of information is considered limited.

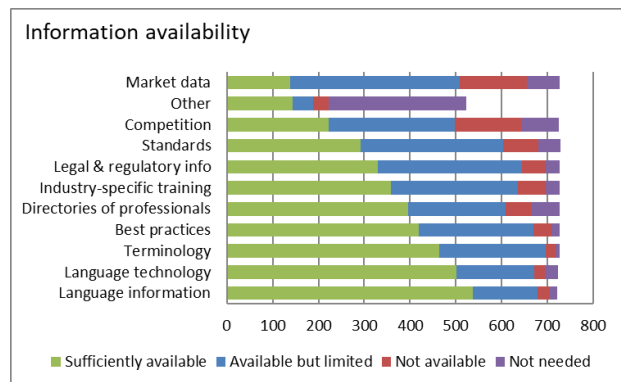


Figure 2 - Information availability

81% of the participating independent professionals and 65% of the language company respondents are a member of their national association. These percentages are obviously strongly biased by the fact that ELIS is organised, among others, the European umbrella organisations of those same associations. They do however show that there is still room for the national associations, especially those of language companies, to extend their reach. The figures for independent professionals also show that women are significantly more likely to join their national association (83% compared to 71% for their male colleagues).

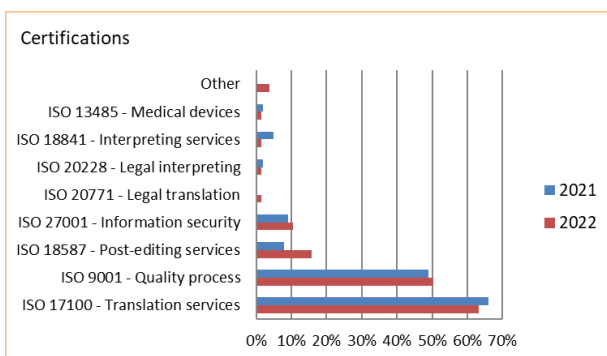


Figure 3 - Certification status

ISO 9001 and 17100 seem to approach their potential maximum.

Certification for post-editing services grows but remains modest.

Although language departments state that data security remains an important trend, language companies are apparently not investing in information security certification. This type of certification may be only of interest for large LCSs.

## CONFIDENCE RESTORED

2021 performance has largely restored the industry's confidence in continued growth and development after the 2020 Covid disruption.

Confidence shows in revenue and profitability expectations, but also in recruitment plans, pricing expectations and investment mood.

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

## Market performance

In ELIS 2021 all industry segments expressed the expectation or hope that 2021 would bring renewed growth, after the Covid disruption. More than 50% of the language company respondents expected 2021 market growth to be in line with pre-Covid years, and were even more optimistic about their own performance (net 71% expecting growth). Independent professionals were considerably more cautious in their answers, with net 24% expecting growth.

According to ELIS 2022 results, both were spot on.

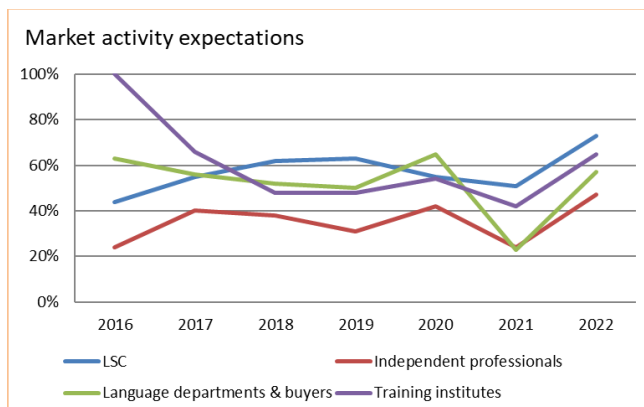


Figure 4 - Market activity expectations

All market segments expect the global market activity to further increase in 2022.

64% (net 50%) of language company respondents and 39% (net 15%) of the independent professionals report that their own activity grew in 2021. Almost half of the professionals (44%) however report no change at all.

Contrary to the Covid-related decline, which hit specific activities and domains particularly hard, the 2021 growth seems to have benefited all types of language services and specialisations.

2021 growth also did not depend on the growth objectives of the participating language company owners (most want to grow and stay independent, only a minority wants to attract external investors or do not see growth as their main objective).



The growth figures motivate both segments to maintain or increase their own expectations for 2022 (net 71% of language companies and net 26% of independent language professionals).

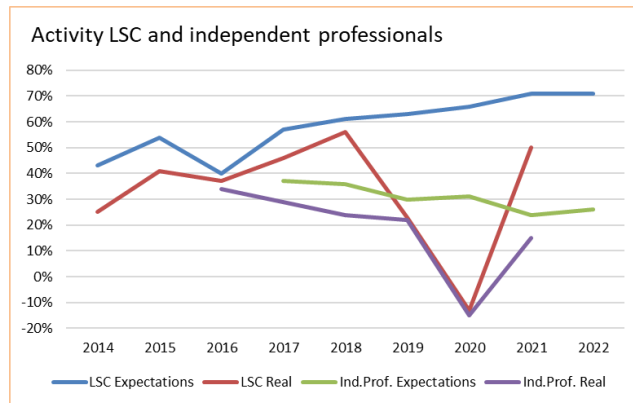


Figure 5 - Language company and professional activity

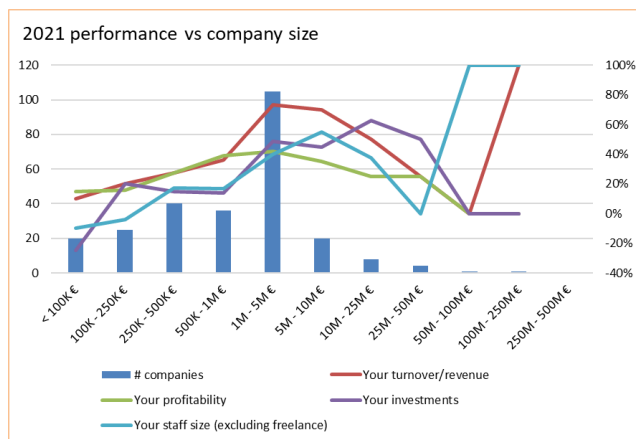


Figure 6 - Language company performance vs company size

The 1-to-5-million-euro *sweet spot* that ELIS 2021 hinted at cannot be completely confirmed by the 2022 results. While companies belonging to this segment do outperform most other segments, they are not the only ones to report outstanding high growth and profitability results.

The recent Slator Language Service Provider Index confirms the strong growth reported by the few so-called super agencies that participated in the survey.

In general, gross margins reported by the participating language companies are higher in the translation activity than in the interpreting service.

17% of respondents reporting a negative gross margin for interpreting but did not report any interpreting activity and are therefore excluded from the table.

Approx. half of the respondents include project management in the gross margin calculation.

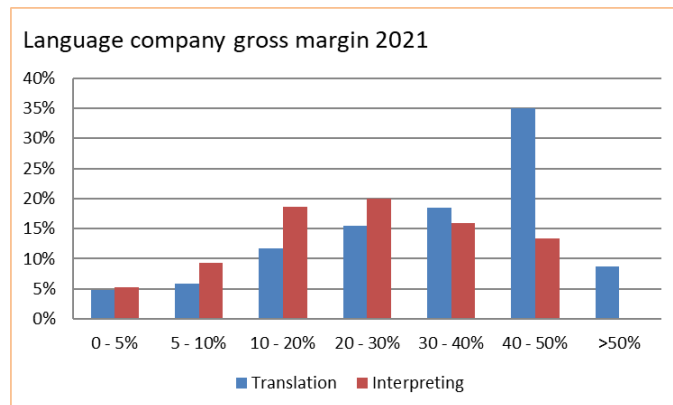


Figure 7 - Language company gross margin 2021

A correlation between performance and ISO 17100 certification could not be found.

ELIS 2022 results show a gender difference in growth and profitability. Companies with male owners report more often a strong increase, both in turnover and profitability. Overall, female owners report lower profitability results. The difference is only partly linked to the company size (women are more strongly represented in smaller companies, which show lower performances).

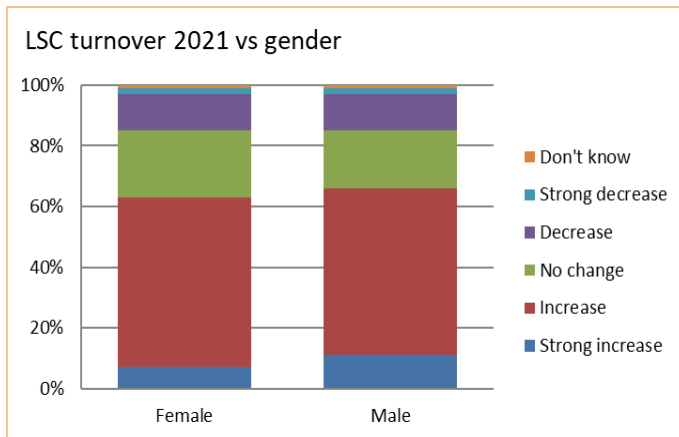


Figure 8 –Turnover vs gender

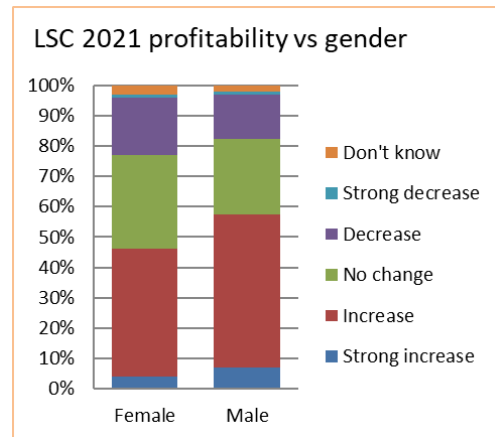


Figure 9 –Profitability vs gender

In the most popular size segment (1 to 5 million euro), where women and men are roughly equally represented (50 vs 54), the results show a weighted difference of 11% in turnover growth (78% vs 89%), and 22% in profitability (34% vs 56%).

Weighted difference:  $[Increase + (2 \times Strong\ Increase) - Decrease - (2 \times Strong\ Decrease)] / \text{number of answers}$ .

## Pricing

2022 may well mark a turning point after years of continuous price stagnation and erosion.

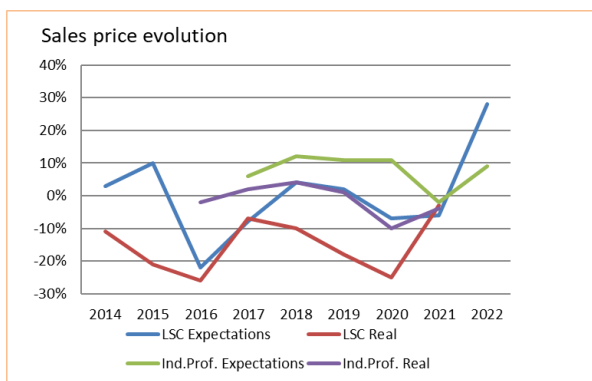


Figure 10 - Sales price evolution

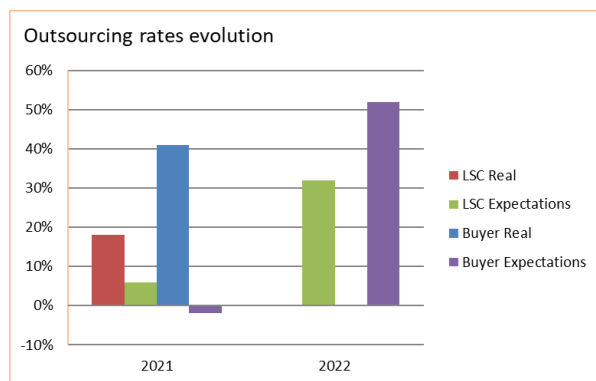


Figure 11 - Outsourcing rates evolution

Language companies and independent language professionals agreed that 2021 sales rates showed signs of recovery from the strong 2020 decline, which led both segments to expect price increases in 2022.

The buyer side shows a somewhat different picture, with a small majority of language companies and a quite substantial part of the language service buyers reporting an increase in 2021 outsourcing rates. Language service buyers do agree that prices are likely to increase in 2022. Whether such increases will apply across all service areas has not been investigated.

## Investment 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 responses below threshold = Grey.

	Companies	Investment	Disinvestment	2018	2019	2020	2021	2022
Austria	9	9	1	0,67	1,30	0,70	0,30	0,89
Belgium	13	12	0	0,62	0,57	0,80	0,70	0,92
Croatia	13	9	4	0,53	1,07	0,20		0,38
Czech Republic	6	8	0	1,40	1,20	0,50	1,00	1,33
Denmark	2	3	0	0,00	1,00	1,00	0,50	1,50
Estonia	4	4	0	0,67	0,80	0,80	1,10	1,00
Finland	4	5	0	1,00	0,57	2,00	1,50	1,25
Germany	16	15	1	0,80	0,89	1,60	0,40	0,88
Greece	4	2	0	0,70	1,20	0,70	1,00	0,50
Hungary	6	4	0	1,00	0,88	0,70	0,00	0,67
Italy	15	8	1	0,91	0,76	1,30	1,00	0,47
Latvia	2	0	1	1,17	2,00	0,70	0,50	-0,50
Lithuania	5	6	0		0,71	0,80	1,20	1,20
Malta	2	2	0					1,00
Netherlands	12	11	2	1,27	1,42	1,00	0,90	0,75
Poland	10	9	2	1,00	0,80	0,40	0,00	0,70
Portugal	16	8	1	0,92	1,18	1,00	0,70	0,44
Romania	2	2	0	0,71	0,43	1,00	1,20	1,00
Russia	14	15	1				0,60	1,00
Slovak Republic	6	6	0	0,60	0,67	1,00	1,00	1,00
Slovenia	6	7	0	1,36	1,44	0,90	0,20	1,17
Spain	15	10	3	0,76	0,56	0,70	0,10	0,47
United Kingdom	19	18	4	0,53	1,10	0,80	0,80	0,74
USA	4	6	0					1,50
				0,83	0,98	0,89	0,70	0,84

Table 2 - Investment mood

When market confidence increases, investment mood usually follows. This is also the case this year. We see the sentiment clearly recovering from its 2021 dip. Although quite a few countries did not deliver the required number of responses to reach the national threshold, the overall picture is one of recovery, although not quite to the pre-Covid levels.

## TRENDS AND CHALLENGES

### Trends

In ELIS 2022, each industry segment had its own list of trends to score as opportunity or threat. That means that the results of the different segments are not fully comparable.

The main differences between language companies and independent professionals are those that can be expected. Language companies see light post-editing and the NMT quality improvement much more as an opportunity than as a threat, while the independent professionals have mixed feelings about both.

Disintermediation, whereby end-clients work directly with the individual language professionals, is obviously seen as a major opportunity by those professionals, while language companies see it as a potential threat (though an almost equal number do not expect any impact). Similar opposite opinions are expressed regarding competition for talent and emerging applications, which are seen as a clear opportunity by language companies. Independent professionals currently still see these emerging applications, such as Data for AI, still primarily as a threat. This may change in the future as these services become more mainstream.

The accelerated entry of venture capital in the language industry, though strongly covered in industry news, is not high on the language company respondents' priority list, as indicated by the high number of Don't know and No impact answers.

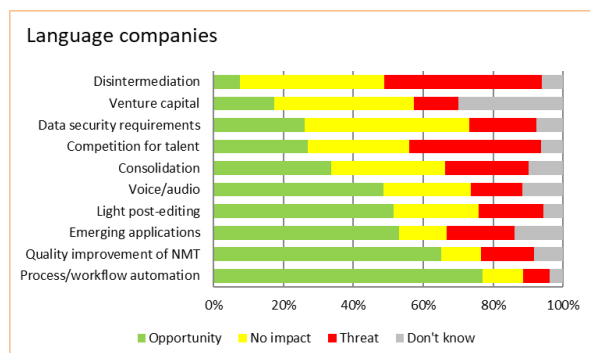


Figure 12 - Trend opinions - language companies

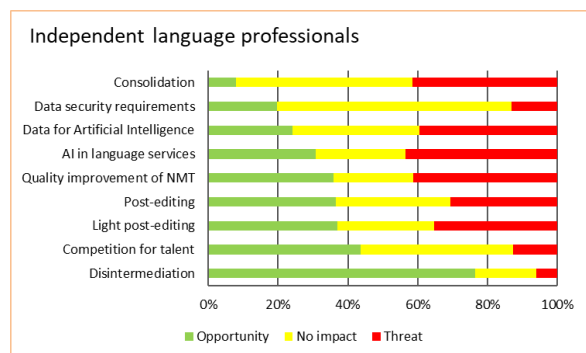


Figure 13 - Trend opinions - independent professionals

Language departments and training institutes express views that are more in line with those of language companies, except for disintermediation, which training institutes see as an opportunity.

A small but not negligible number of respondents in these two segments do not consider competition for talent as a trend and most likely consider this as a temporary phenomenon.

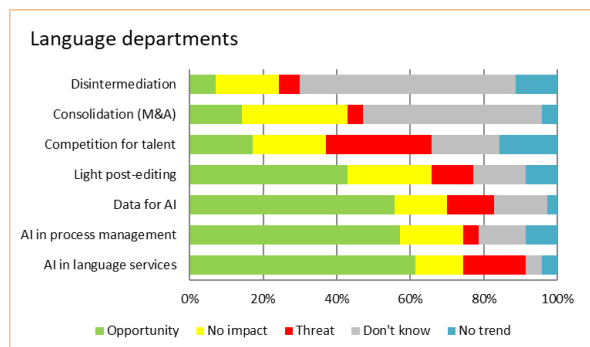


Figure 14 - Trend opinions - language departments

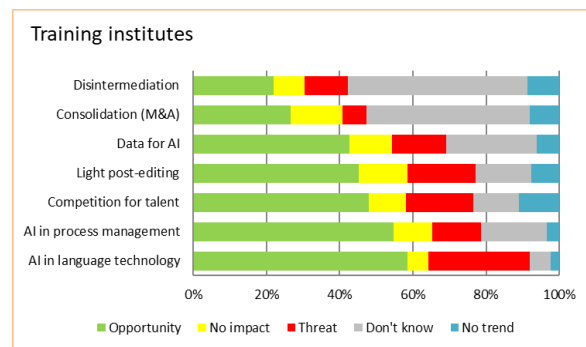


Figure 15 - Trend opinions - training institutes



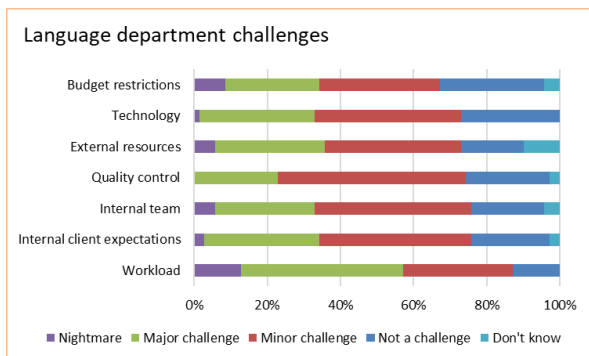


Figure 18 - Challenges - language departments

For language departments, the main challenge is clearly their workload.

Budget restrictions, though often described as such, are apparently not the main concern of language departments.

Due to the limited number of answers from this segment, it is impossible to draw reliable conclusions regarding individual types of organisations.

80% or more of the training institute representatives report that they are working in a challenging environment. They are struggling to meet the industry expectations and the new market requirements within the limited timeframe and budget that are available to them, all being confronted with ever increasing administrative procedures. Technology is just an additional element that adds to the challenge.

Besides these challenges to their own activities, they also express a deep concern regarding the (lack of) visibility of the profession as a potential cause for declining student numbers.

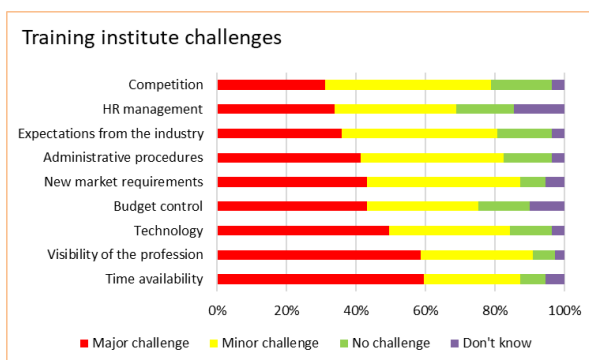


Figure 19 - Challenges - training institutes

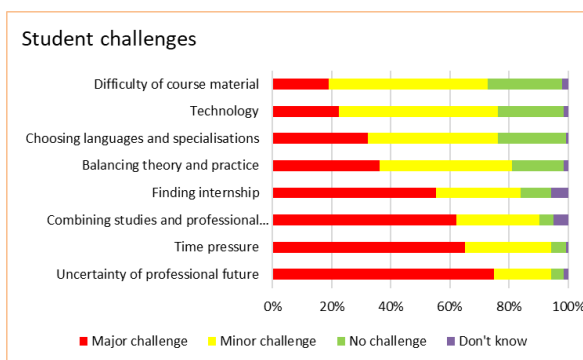


Figure 20 - Challenges - students

Students share the time pressure challenge with their professors and other training institute representatives, but are even more concerned about their own professional future (in line with the visibility concern of the training institute representatives) and how to combine their studies with professional activities. The latter is a surprising finding since this implies that many of them do already have such a professional activity). The high challenge score of internships indicates that finding internships remains an issue. The section about how the training programmes prepare for a [professional life in the language industry](#) confirms that this topic deserves closer attention, in particular regarding international internships.

On a lighter note, students do not seem to consider technology or the programme content itself to be major challenges.

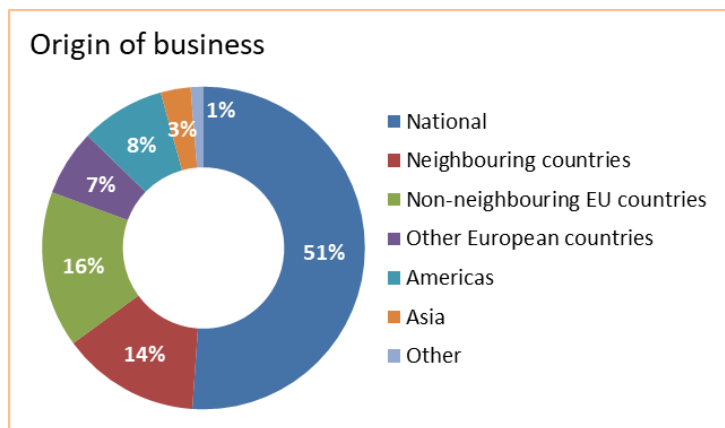
## BEHAVIOUR CHANGES

After a disruptive event like the Covid pandemic, one could expect that industry stakeholders would rethink the way they are doing business in order to avoid or reduce the impact of such events in the future.

ELIS 2022 results show cautious changes in behaviour but no drastic moves that would not have happened without the Covid disruption. If anything, Covid has accelerated plans that were already in the making. ELIS results also show that industry reality is not as 'hyped' as press releases and industry news tend to present.

### Areas of business

#### Origin



According to this year's results, only 12% of business originated from outside Europe.

This is even less than the 30% reported in the first edition of ELIS.

This result can be a reason for concern. It shows a too high dependency on European economy among the small and medium-sized language companies.

Figure 21 - Language company origin of business

Contrary to what could be expected, participating companies belonging to an international group report that on average less than 10% of their business originates from sister companies.

#### Services

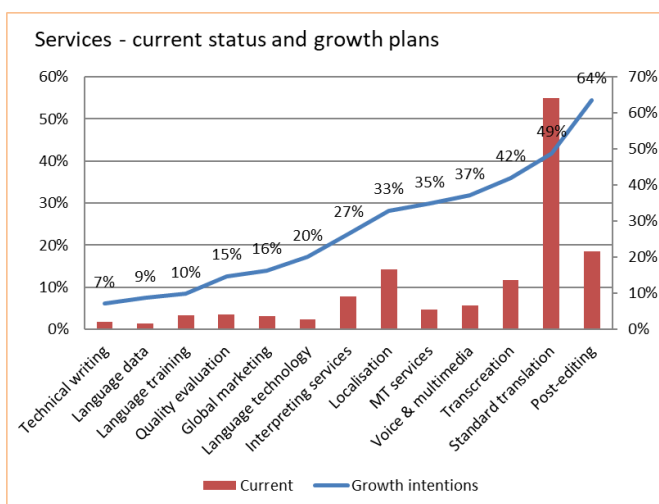


Figure 22 - Services ranking and growth plans

Among language companies, standard human translation is still by far the dominant type of service.

Post-editing ranks second, but is identified as the activity with the highest growth potential. With 42% of growth potential, transcreation (or creative translation) completes the top 3 of LSC growth targets.

Language data, often heralded as a potential investment and growth area, scores very low, both in current ranking and in growth intentions.

37% of respondents mention voice and multimedia as a potential growth service. The survey results however do not show meaningful recruitment intentions in this area, which makes a successful growth of the activity doubtful.

## Subject areas

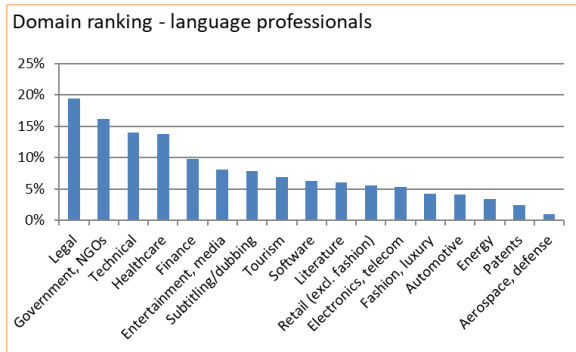


Figure 23 - Domain ranking - language professionals

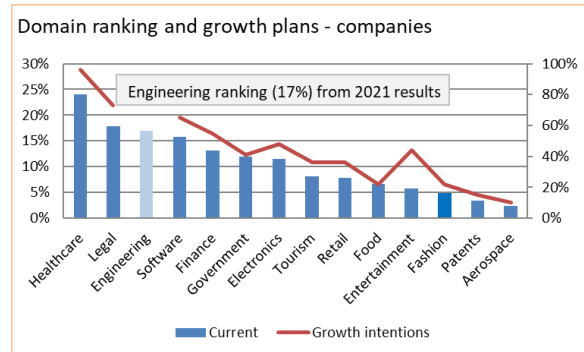


Figure 24 - Domain ranking – language companies

The subject area rankings for independent language professionals and language service companies are largely comparable, which is not surprising.

There are however a few significant differences at the top of the ranking. The absolute top domain for language companies – healthcare – only ranks 4<sup>th</sup> for the independent professionals, while government and NGO-type business ranks second for independent professionals but only in 6<sup>th</sup> place for language companies.

The language company growth intentions regarding client sectors follow the current ranking, except for Electronics/Telecom and Entertainment (which also includes media and computer games), which companies want to develop more.

The correlation between current activities and growth intentions indicates that companies and independent professionals are currently less likely to explore new horizons. This is understandable in a year of general activity growth, but does not help the industry to prepare for the next disruptive event.

Note that the subject area *Engineering* was missing from the ELIS 2022 language company list. In the above chart for language companies, it has been included at the position corresponding at its 2021 percentage.



## Sales and marketing

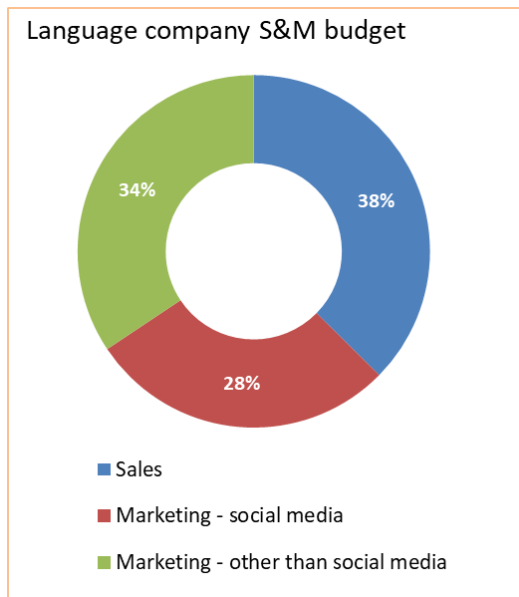


Figure 25 - Language company sales and marketing budget

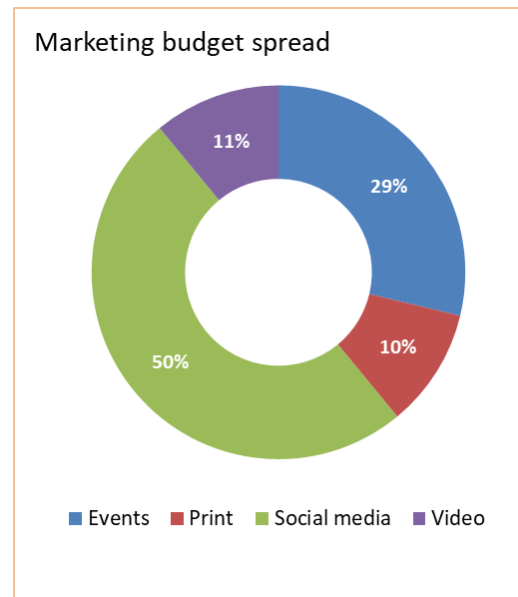


Figure 26 - Language company marketing budget spread

Language company respondents report that they spend almost twice as much on marketing than on actual sales, and that social media today represent approximately half of the marketing budget.

## Operations

### Independent language professionals

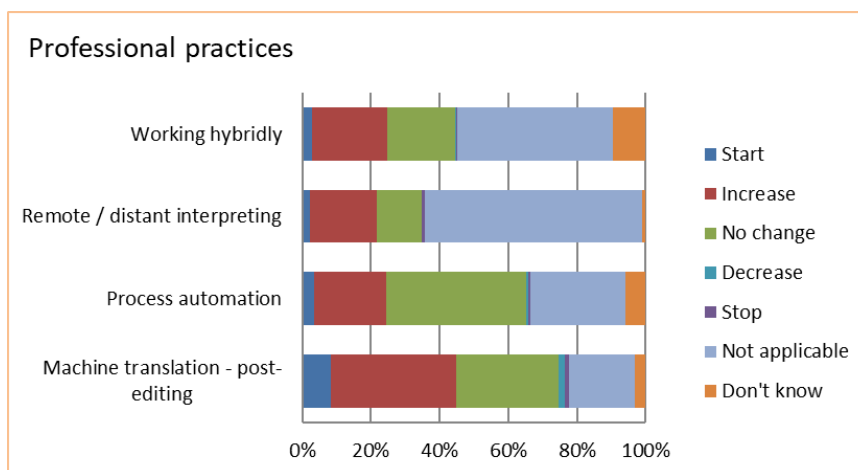


Figure 27 - Professional practices - language professionals

The increase of post-editing work is, not surprisingly, identified as the biggest change in the professional practice of independent professionals.

Hybrid working, RSI and process automation are all here to stay.

### Language service companies

Among language companies, 2021 brought mainly technological and process changes. But there is more. 22% of major restructuring, 18% of major changes in service offering and 16% of changes in management are more than one would expect in a standard year. 6% of changes in ownership or

investors, and 8% of active acquisitions or new office creations are in line with the investment mood indicator.

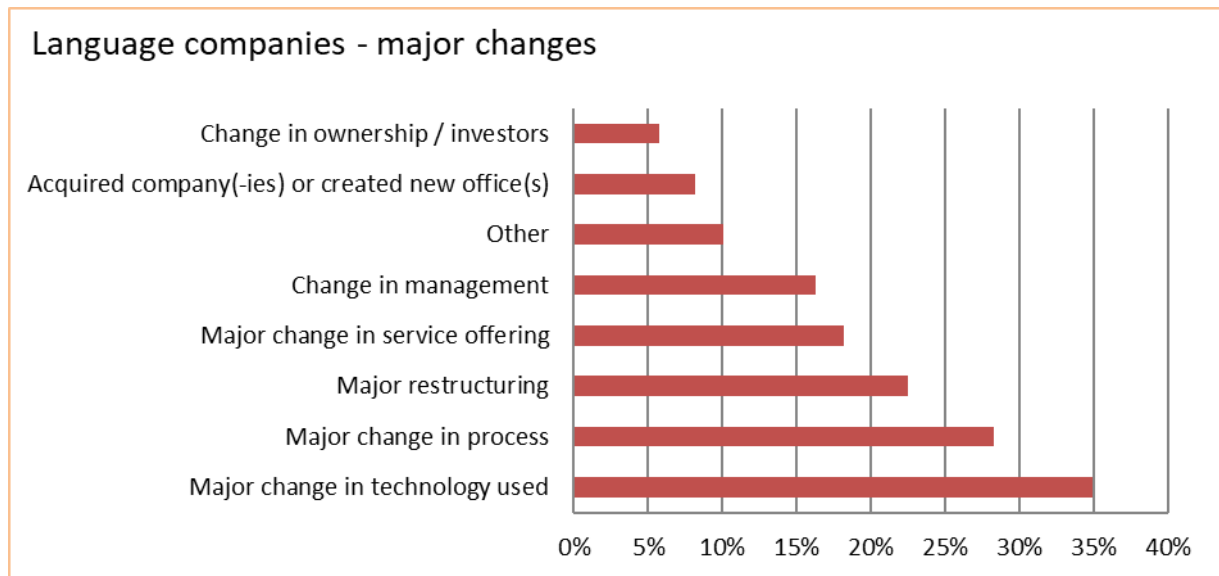


Figure 28 - Language companies major changes

## Outsourcing practices

### Language service buyers

The responding language departments in public administrations are predominantly working in an in-house model, while those belonging to private enterprises prefer to outsource their language work.

Note that the limited number of respondents in these categories (the y-axis) reduces the reliability of the data.

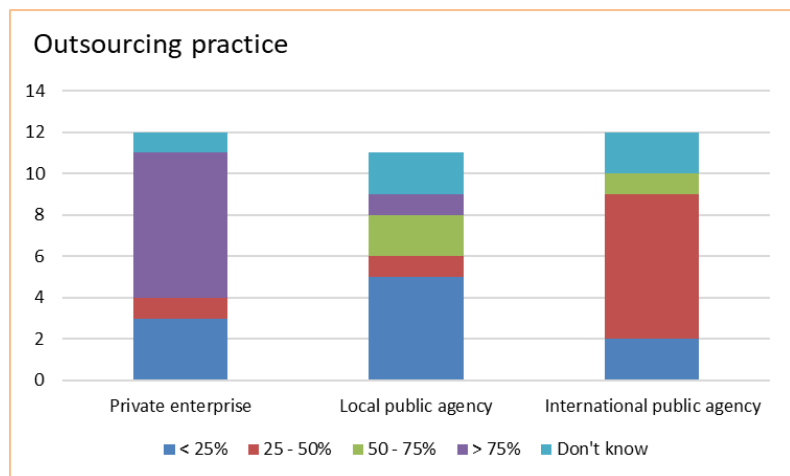


Figure 29 - Language department outsourcing practice

## Changes in outsourcing practice

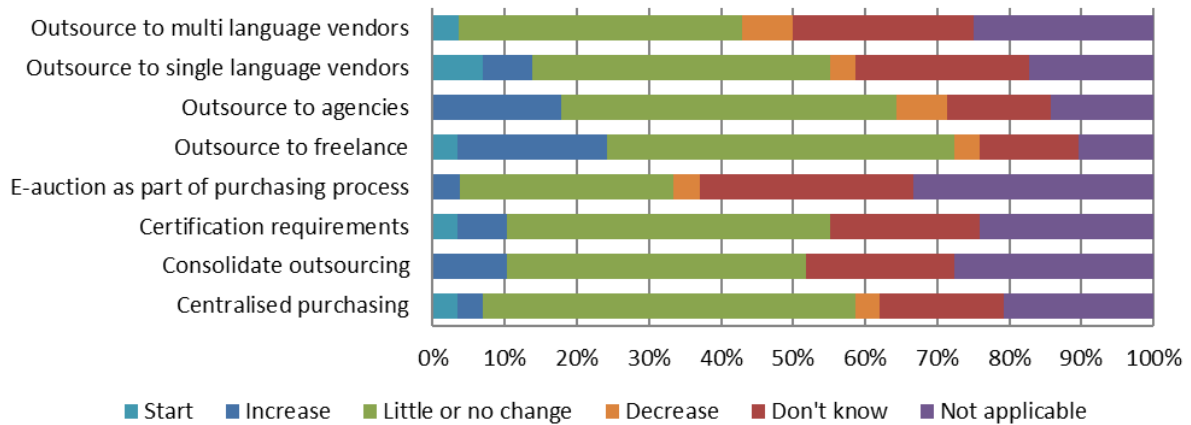


Figure 30 - Language department changes in outsourcing practice

Based on the answers from language departments and language service buyers, end-client outsourcing practices are not likely to change significantly.

If anything, we see a small tendency to outsource more to freelance providers, but at the same time respondents also hint at an increase of consolidated outsourcing, which implies reducing the number of service providers.

E-auctioning and certification requirements have clearly lost their high visibility status.

## Outsourcing individual activities

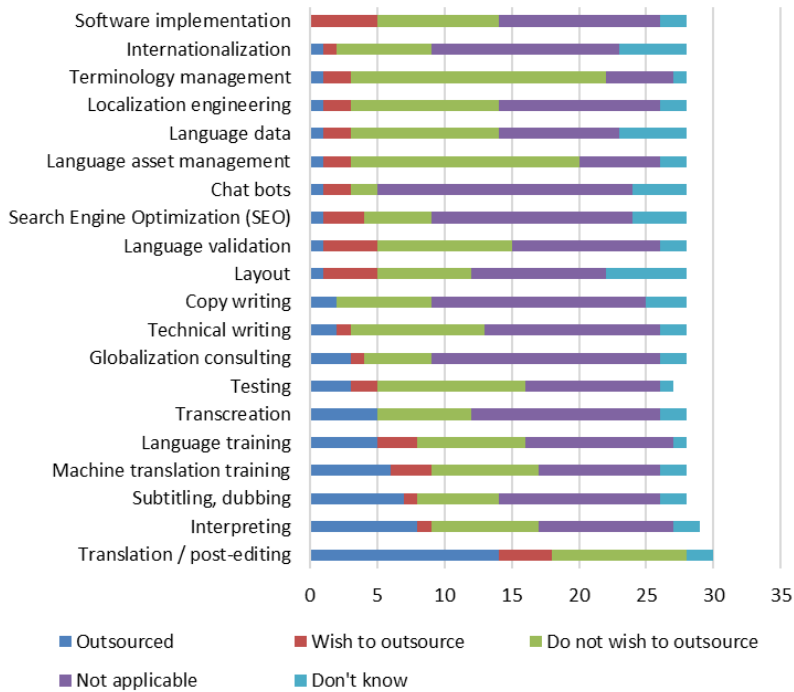


Figure 31 - Language department outsourcing activities

The x-axis shows the (limited) number of responses to the question.

The status quo is also visible when looking at the individual activities that language buyers (wish to) outsource. Language departments continue to focus their outsourcing on classic activities such as translation/post-editing, interpreting and subtitling. Outsourcing language asset management, including terminology management, is clearly a no-go.

Independent language professionals

According to ELIS 2022 data, approximately 45% of the independent professionals' business originates from direct clients.

Net 17% of respondents expect this percentage to increase (26% increase, 9% decrease), while almost one in two does not expect any meaningful change.

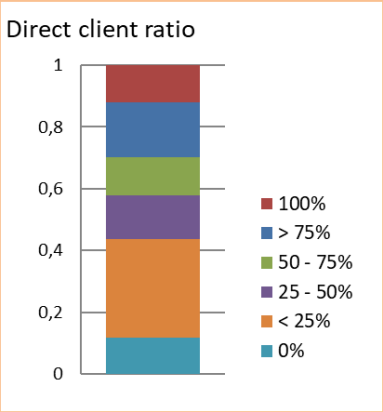


Figure 32 - Independent professionals direct client ratio

Language service companies

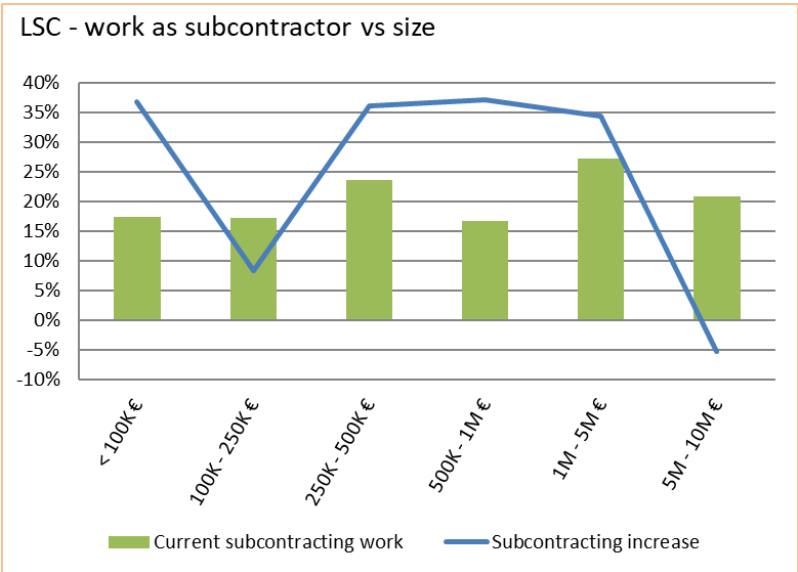


Figure 33 - Language company work as a subcontractor

On (weighted) average, approx. 22% of language company business is outsourced to them by other language companies, with relatively comparable levels for all small and medium-sized companies.

This is significantly more than the 18% that was reported in 2020. This growth is also confirmed by the 2022 participants.

It is interesting to note that companies working primarily as subcontractors recorded the highest revenue growth rates.

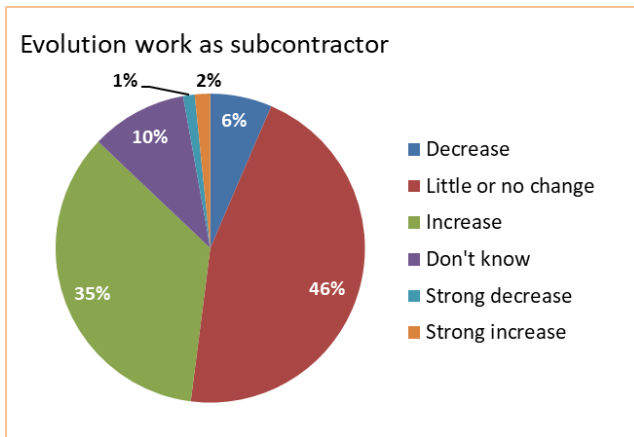


Figure 34 - Language company subcontracting work evolution

While 46% do not expect that their direct client / subcontracting mix will change much in 2022, 35% expect an increase of subcontracted work, which is a significant percentage.

Although the large majority of language service companies operate in an outsourcing model, it is worth noting that, according to the ELIS 2022 answers, 31% outsource less than 25% of their business, and that 7% operate in a completely in-house production model.

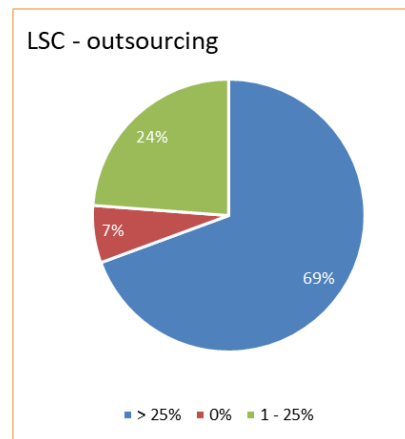


Figure 35 - Language company outsourcing practice

The participating language companies clearly prefer to outsource to the freelance community.

Only participants belonging to the larger mid-size segments report a higher ratio of outsourcing to agencies. Note however that the lower number of answers from the larger size categories makes this-result less reliable.

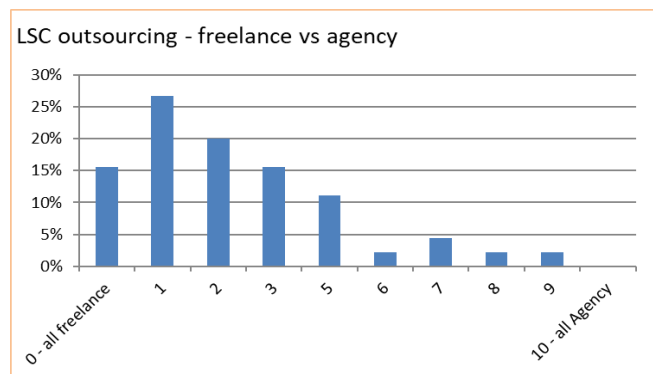


Figure 36 - Freelance vs agency outsourcing

## CLIENT RELATIONSHIPS

In ELIS 2022, only the survey for independent language professionals addressed the importance of individual aspects of the relationship with direct clients.

A comparison with 2021 results did not show any significant changes

Respondents did identify several aspects that also play a role in the client relationship, such as - availability, industry knowledge, responsiveness, confidentiality and references, as well as the added value translators can offer.

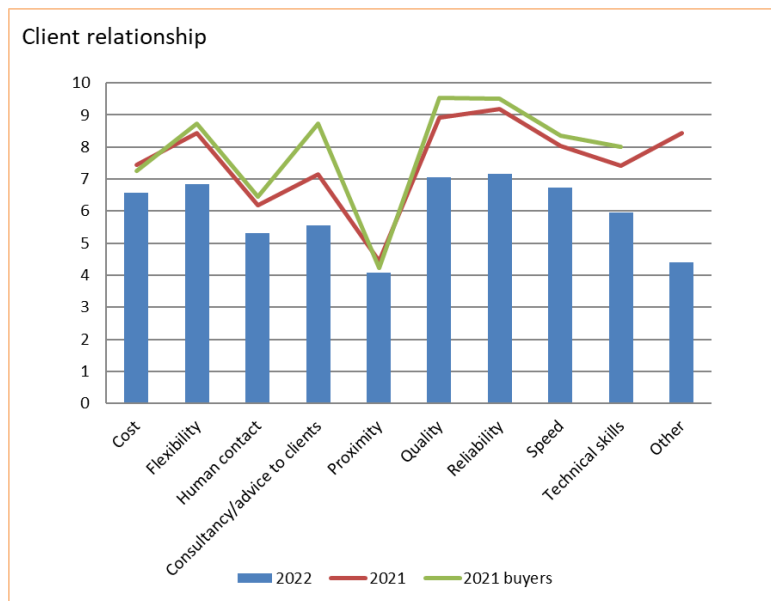


Figure 37 - Independent professionals' relationship with direct clients

## Relations between independent language professionals and language companies

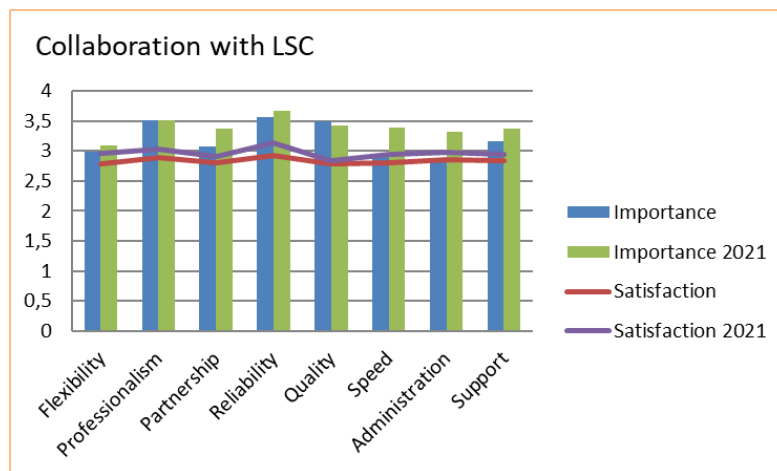


Figure 38 - Collaboration with language companies

Overall, the independent professionals gave slightly lower scores, both for importance and satisfaction, for the various aspects of their cooperation with language companies.

On a 1-to-4 scale from Very Dissatisfied to Very Satisfied, the average score is 2.8.

The two most valued aspects – Reliability and Professionalism – get also the highest satisfaction scores, which is encouraging (although the variations are small and we do see a bigger than average drop in satisfaction for the Reliability aspect).

The lower importance score for Partnership also raises some questions about the relationship.

Independent professionals report that more often than not their language company clients have their translations reviewed by expert native speakers, which may be linked to increased ISO 17100 certification levels.

As expected, rush or short deadline deliveries are reported as common.

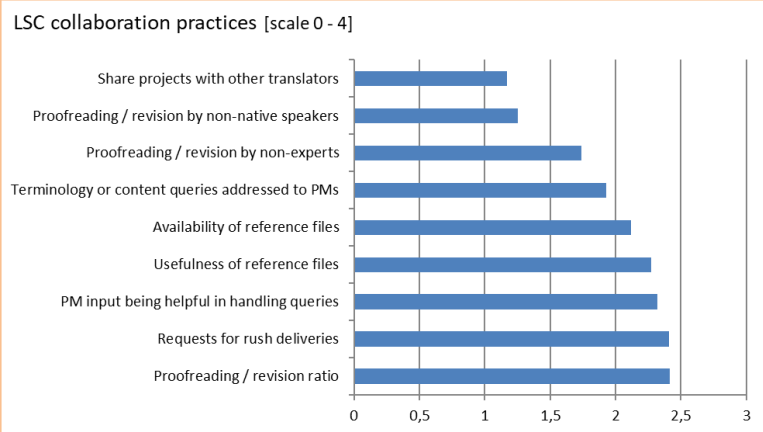


Figure 39 - Specific practices in collaboration with language companies

Some positive trends are emerging from these results: an increase in the amount of proofreading done, the materials supplied as references are generally viewed as more useful and PMs appearing are more open to queries from translator.

All this indicates that language companies and independent professionals are building better relations.

The high levels of rush deliveries and sharing of projects on the other hand is a sign that the process is not yet optimised for all parties involved.

### Client service practice

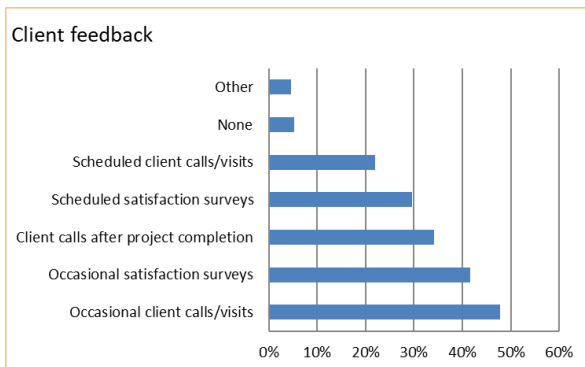


Figure 40 - Client feedback in language companies

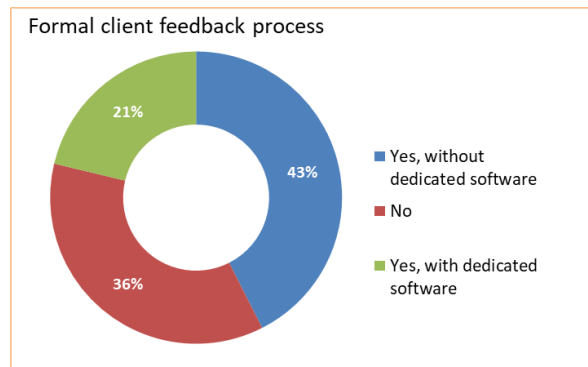


Figure 41 - Formal client feedback process

Only 5% of language company respondents did not select any client feedback measure, but only 40% have client feedback integrated as a scheduled activity in their process.

Dedicated client feedback software is implemented by only one third of participating companies and one in five is lacking any formal process of client feedback handling.

# DEALING WITH TECHNOLOGY

## Technology implementation

### Independent language professionals

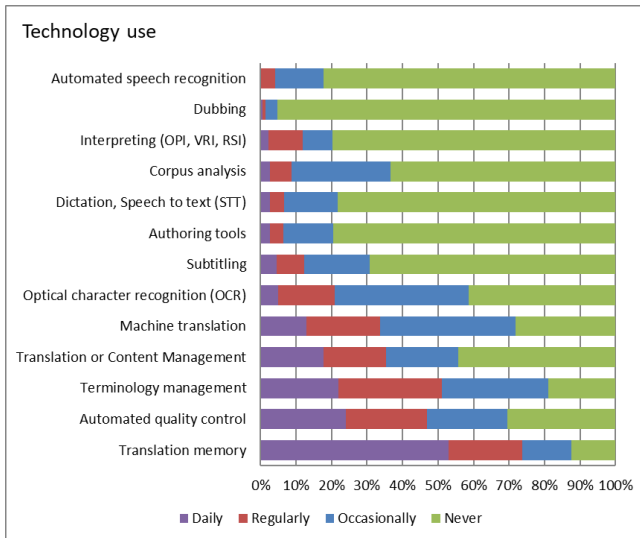


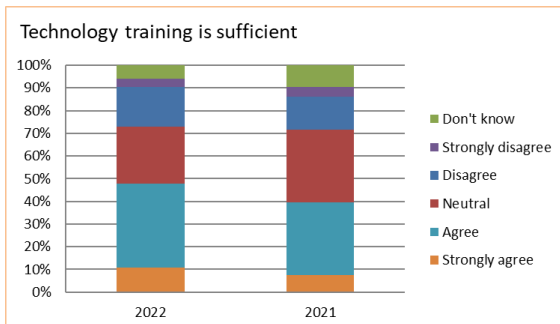
Figure 42 - Technology use by independent language professionals

12% of respondents reported that they are never using any translation memory tools. This is considerably less than the 23% in 2017 – the first year in which ELIS data from independent professionals were analysed separately. This means that CAT technology is slowly but surely implemented in all use cases, including those that for which the technology used to be considered less useful.

The same applies to the language company segment, where only 3% report not to use CAT tools, compared to 10% in 2017.

Slightly more than 70% of independent professionals are using machine translation to some extent, but half of them use it only occasionally. After translation memory and terminology management, it is today the most widely used technology among independent language professionals.

Although 30% of respondents report to use subtitling technology, more than half of them are using it only occasionally. This is in line with the 7% of business volume that this type of activity is reported to represent for independent language professionals.



A considerably higher percentage of independent professionals report that the technology training they get from tool providers is sufficient for them to be successful (48%, compared to 40% in 2021), but there are still 21% who disagree, which is even more than the 18% in 2021. The opinions are clearly more outspoken (both Neutral and Don't know dropped significantly).



## Language companies

Language service buyers indicate that 36% of their language providers are completely free in using the technologies they prefer. That means that 64% of technology use is to some extent guided or imposed by the client to match the latter's own technology stack.

69% of the participating language companies do not develop their own language technologies. 13% do develop these technologies for internal use and 18% also sell them to external users.

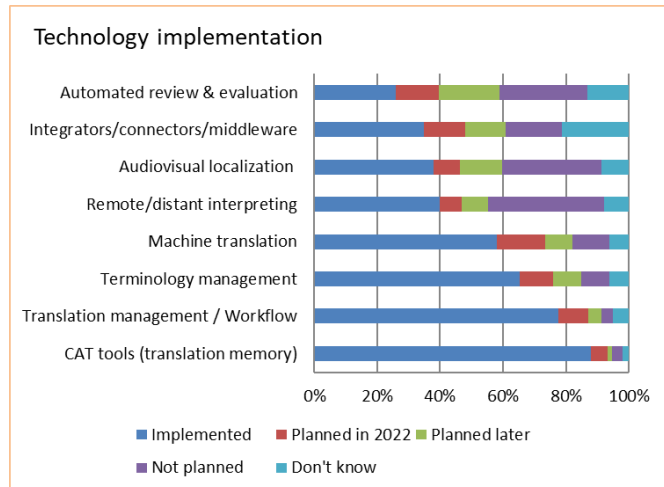


Figure 43 - Technology implementation in language companies

RSI technology is implemented by 40% of the language companies (although interpreting represents only 27% of their business). Given the small percentage (15%) of additional planned implementation (both in 2022 and later), it seems reasonable to conclude that RSI implementation, at least among language companies, has almost completely filled its potential niche.

Automated language quality review seems to be the technology with the largest growth potential in this segment of the industry.

## Language departments and language service buyers

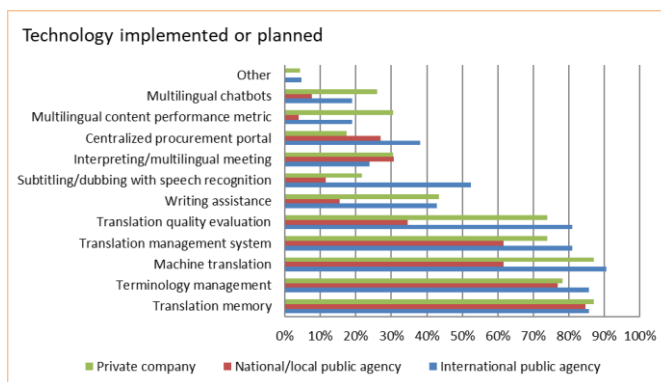


Figure 44 - Technology implementation in language departments

While the overall technology ranking in language departments is very similar to that in language companies, we see remarkable variations between the different types of organisations.

Overall, local public agencies seem to have a less developed technology approach, except where technology is already completely mature (translation memory and terminology management) or where it is an integral or necessary part of the organisational structure (centralized procurement portals and RSI).

Contrary to their local colleagues, international public agencies are forerunners in virtually all technology categories.

## Training institutes

Surprisingly, 14% of the training institutes that are offering interpreting courses – both EMT and non-EMT - apparently do not plan to implement remote interpreting technology, which seems to be a missed opportunity.

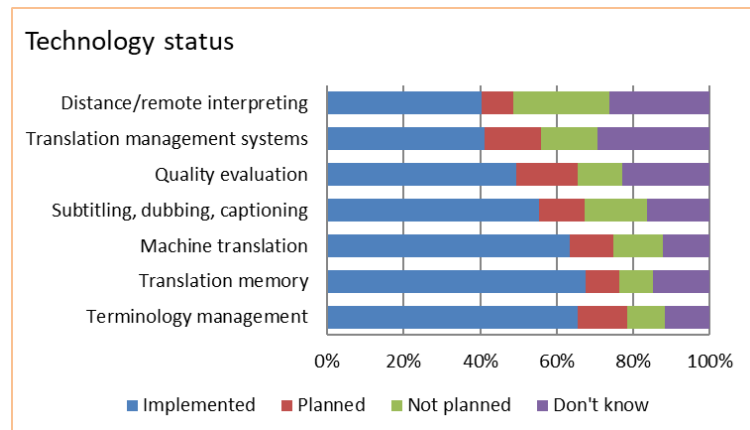


Figure 45 - Technology implementation in training institutes

The implementation of translation management systems is still somewhat lagging behind, although this technology is playing an ever-increasing role in the relationship between both language companies and independent language professionals and their clients.

## Working with machine translation

When ELIS – then known as the EUATC survey - was run for the first time in 2013, machine translation was still primarily seen as a threat and a challenge. Only few language companies saw it as an opportunity.

Machine translation has come a long way since then.

Today 65% of language company respondents see the improved quality of neural machine translation as an opportunity rather than a trend. For independent professionals however, that increased quality is reason for concern, with only 35% seeing it as an opportunity, and 41% as a threat.

According to this year's ELIS results, 58% of those companies have implemented the technology and an additional 20% are planning to do so, and more than 70% of independent language professionals report to be using the technology to some extent.

Language departments in international public agencies and private enterprises are reaching or approaching even the 90% mark and 74% of the academia respondents report that MT is implemented or planned.

Implementation is however not the same as actual usage, and enthusiastic press releases do not always represent true reality. While respondents from the training institutes estimate that 55% of professional translation work is already done using MT and expect that most of it will be MT-based by 2030, reality looks much less epic according to those who are actually using it.

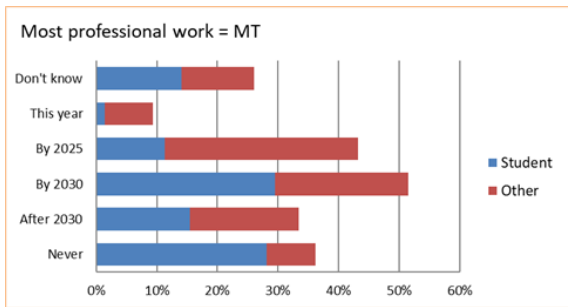


Figure 46 - MT domination as estimated by training institutes

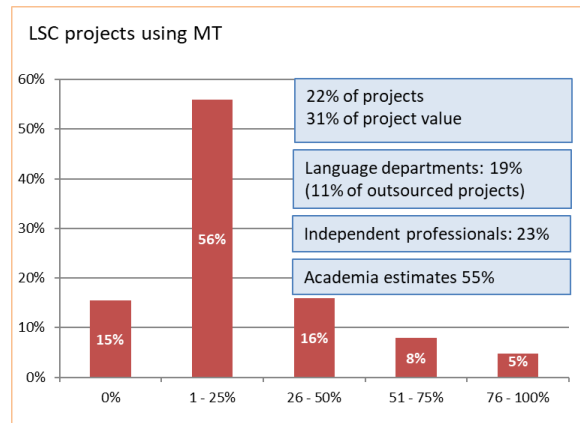


Figure 47 - Actual use of MT

According to language company respondents, 22% of their translation projects are executed using MT. Weighted to the company size these projects represent up to 30% or more of the total project value.

Similar values are reported by independent professionals (23%) and language departments (19%), although the latter result cannot be considered representative enough due to the small number of responses.

Since MT is clearly destined to be an integral part of the professional translation landscape, industry stakeholders are discussing how to integrate the technology in the industry's business model. A hotly debated topic is how to compensate the work of post-editors.

In the diagrams below, the x-axis shows the number of answers.

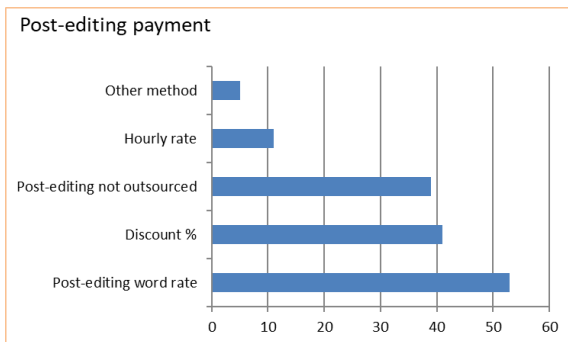


Figure 48 - Post-editing payment methods

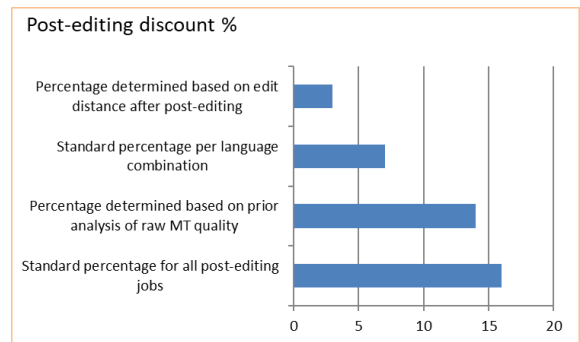


Figure 49 - Post-editing discount calculation

Most language company respondents prefer to work with specific post-editing word rates, which are easy to apply, but do not cater for differences in effort between individual projects. Those who prefer to work with post-editing discount percentages applied to the standard translation rate, have different approaches to determine the discount percentage.

Convenience is clearly an important factor in the discussion, but fairness plays a key role as well. A majority of the respondents prefer one of the methods that take into account the quality of the raw machine translation output for a particular project or language pair.

This discussion is not finalised yet, but based on the current data it does not seem likely that hourly rates, which are regularly mentioned as a fair alternative, will become the standard method for compensating post-editors any time soon.

## Working with automated workflows

Several years ago, automated workflows entered the outsourcing environment as a means to lower project management effort. The remote working conditions imposed by Covid have considerably accelerated the implementation of this technology to an extent that independent language professionals, but also language company employees are expressing concerns about its 'dehumanising' impact on the outsourcing relationship and the quality of the deliverables.

The ELIS 2022 results regarding the cooperation between independent professionals and language companies do not suggest that automated workflows currently have a significant impact on the relationship, although 45% of the language company respondents indicated that more than 25% of their projects are run using such automated workflows.

Language companies themselves do report that the use of automated workflows by their own clients (although relatively limited for the time being) does have a certain impact. About one third report that their clients have implemented measures to minimise the impact. In general, these measures are related to increased communication.

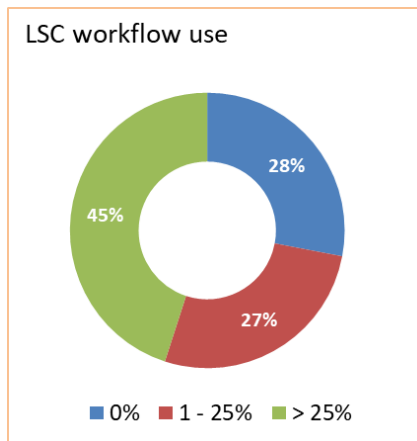


Figure 50 - Workflow use by language companies

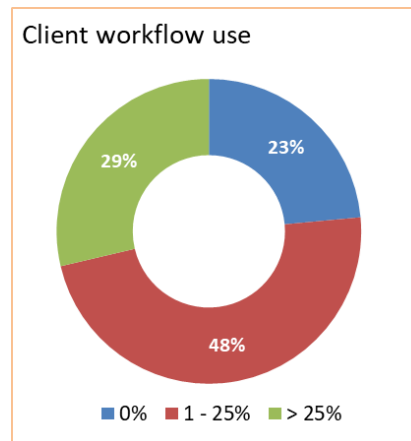


Figure 51 - Workflow use of end-clients

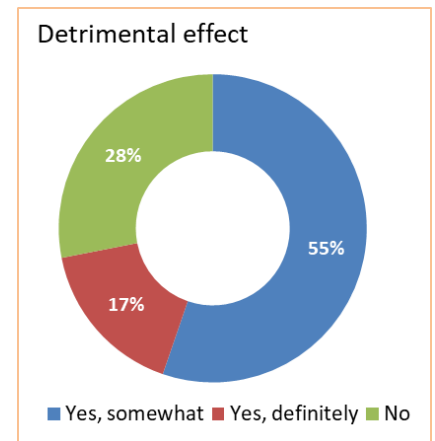


Figure 52 - Detrimental effect of client workflows

## Preferred tools

CAT		MT		TMS		RSI		Video	
Trados	144	DeepL	64	Plunet	50	Zoom	17	Aegis Sub	4
MemoQ	102	CAT-embedded	23	XTRF	35	Teams	5	SubtitleEdit	4
Memsources	67	GT	17	Proprietary	32	Interactio	4	CaptionHub	2
Across	37	Globalese	9	CAT-embedded	14	Interprefy	4	Proprietary	2
XTM	19	Microsoft Translator	9	SDL TMS	7	Interpreter Intelligence	2	SDL Studio	2
SmartCAT	10	Proprietary	6	Projetex	5	Kudo	2	Subtitle Workshop	2
Smartling	10	Systran	6	protemos	5	Skype	2	Other	9
Transit	10	client-provided	4	Asana	4	Other	9		
Translation workspace	4	Modern MT	4	LSPexpert	3				
ApSIC Xbench	3	Amazon	2	LTC	3				
Crowdin	3	Intento	2	ProjectOpen	2				
Localise	3	Kantan	2	Verifika	2				
Wordbee	3	Pangeanic	2	Other	17				
Wordfast	3	SDL engine	2						
ATMS	2	Tiide	2						
Catalyst	2	eTranslation	1						
GlobalLink	2	Other	5						
Passolo	2								
Translate5	2								
Other	7								

Figure 53 - Specific tools used by language companies

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

What stands out from these lists:

- In each category we have a clear top 2 or top 3
- Proprietary tools continue to play a significant role in translation management, which is possibly linked to a perceived need for deeper customization
- The boundaries between CAT, MT and TMS are blurring as tools become more and more embedded and multifunctional
- Communication platforms with embedded RSI functionality seem to win over pure RSI solutions
- The EU's own e-Translation engine (for obvious reasons the top choice among language departments participants), is mentioned only once by language companies.

## WORKING IN THE LANGUAGE INDUSTRY

A study commissioned by the Directorate General Translation in 2009 estimated the value of the language industry in the EU Member States at approx. 8.4 billion euro in 2008, growing at a compounded rate of 10%.

While this was already a sizeable number, more recent research by third-party market research organisations is proposing numbers that range up to approx. 50 billion USD for the global market in 2019 – 2020 (estimate by Statista Inc and CSA.), which would suggest a value of some 20 billion euro for the EU Member States.

According to CSA, the top 100 language companies are increasing their share of the market year after year, but are still only representing approx. 15% of the market. This means that small and medium-sized companies – the typical audience of the ELIS surveys – deliver 85% of the global language services.

A market of this size is by definition a valuable source of employment. Due to the very nature of the service and the prevailing freelance-based business model, the language industry is also a sector that newcomers can easily enter without too many capital- or technology-related restrictions.

ELIS 2022 has therefore paid additional attention to topics related to employment and training.

### Employment statistics

It is difficult to obtain official employment data for the language industry, primarily because national and international statistics usually group this sector with other business, editorial or secretarial services.

According to a publication by Eurostat, there were 180,000 translators and interpreters in the EU in 2018, or 0.1% of the EU employment. Unfortunately, no details were given. It is therefore impossible to establish if this represents the total employment of the sector, or rather the freelance part of it.

ELIS 2022 asked a selection of language company participants to estimate the number of language service companies (excluding freelancers) in their own country. Based on the median values of these estimates, and the mid-point\* employment average of the participating companies, the language company employment is estimated at 140,000 (minimum 70,000 and maximum 210,000).

ELIS employment estimate	
Estimated number of language companies in the EU (sum of medians of national estimates)	4,000
Number of answers to estimate question	88
Number of employees in participating companies (mid-point* average)	3089
Total estimated number of employees	140,000

*Table 3 - Language company employment estimate*

\* mid-point: ELIS asked language companies to indicate their staff size by selecting a size range. The mid-point refers to the median value of the range (ex. mid-point of the size range 5 to 10 is 7.5)

Taking the Eurostat figure of 180,000 translators and interpreters as a basis (to err on the conservative side, since all ELIS segments indicated that the number of active professionals increased), the total employment size of the EU language industry would be:

- 180,000 if the Eurostat figure already included language company staff
- 302,000 if the Eurostat figure represented the number of translator and interpreter entries in the national statistics (considering that 10% are language companies with employees).

When estimating employment levels in a freelance-dominated industry such as the language industry, one also has to take into account the level of partial employment.

32% of the participating independent language professionals report that they need to top up their freelance income with another professional activity.

**Recruitment**

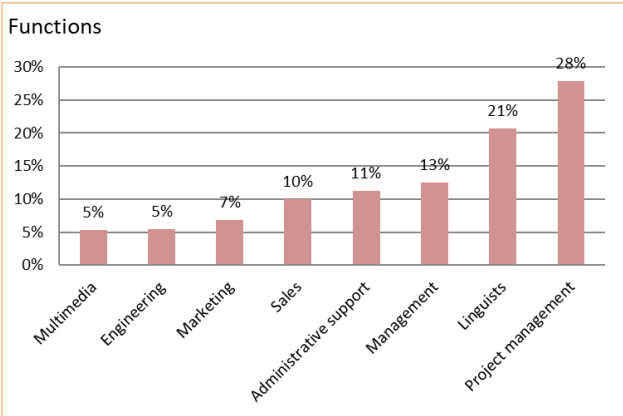


Figure 54 - Language company staff functions

Staff distribution and recruitment plans have not significantly changed.

59% of language company staff (expressed in full time equivalents) is directly involved in production, in a project management role, as linguist, multimedia expert or engineer. Recruitment intentions for language and project management functions remain high, which is a further confirmation of company confidence.

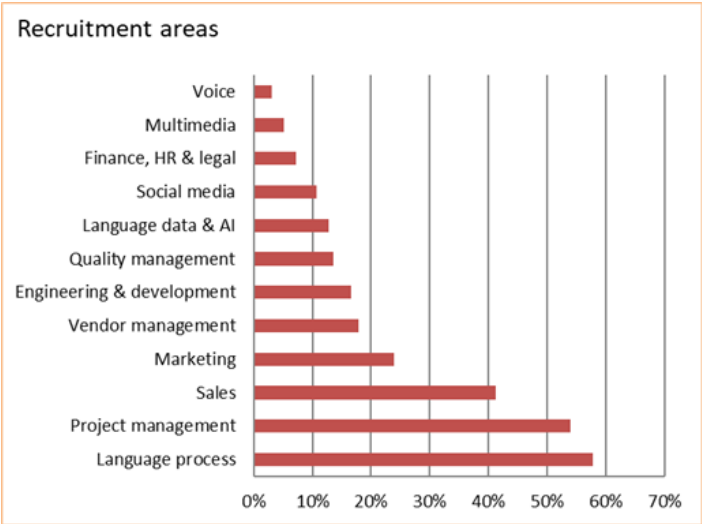


Figure 55 - Language company recruitment intentions

While this may seem high, the 24% of management and administration and 17% of sales and marketing staff reflect the role of language companies as language service managers and the highly competitive landscape in which they operate.

Although 37% of language company respondents indicate that they see voice and multimedia as a growth area, only 8% have recruitment plans for these two functions, which does not seem adequate for a successful development of the service.

## Employment quality

### Work from home

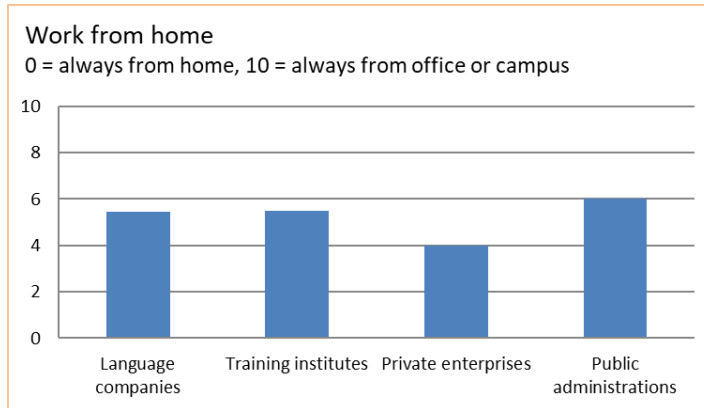


Figure 56 - Work from home

Work from home has always been a fact of life for independent language professionals.

Since Covid, it has also entered the daily reality of all other segments of the industry.

Today, in the first post-Covid year, we see a partial return to the office. The general expectation is that this new hybrid work form will be the new norm.

### Work-life balance

Language industry stakeholders rate their work-life balance as average (on a scale of 0 to 10).

Female employees of language companies are more positive about work-life balance than their male colleagues (5.86 vs 5.54)

Independent professionals state that the lack of predictable work volumes is detrimental to their work-life balance. The pandemic has been an aggravating factor.

Setting clear limitations is mentioned as a way to achieve a good balance, but so is the setup of an appropriate work environment.

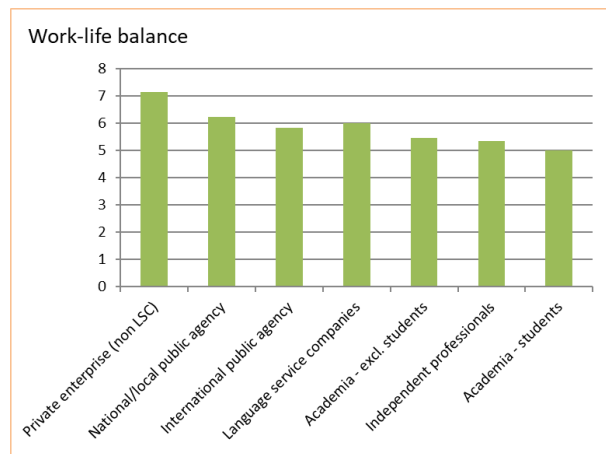


Figure 57 - Work-life balance

### Salary, benefits and career opportunities

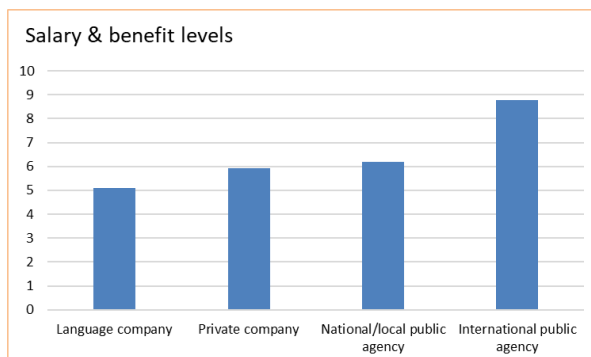


Figure 58 - Salary and benefit levels

Among the employee respondents, language company employees score their salary and benefit levels at barely average (5.09), in stark contrast to their colleagues in international public agencies (8.76).

Language department members in private enterprises (5.91) and local public agencies (6.19) do not score much higher than their colleagues in the language companies.

Language company respondents do not report a noticeable gender pay gap. The small difference in salary & benefit score between female and male respondents (5.04 vs 5.21) seems to be linked to role differences.



Career opportunities in language companies are considered average at best. Here too, female employees see less opportunities (score 4.88) than their already critical male colleagues (score 5.07).

The situation for independent language professionals is hard to compare with that of employees or public officials. The 2022 results do indicate that the financial situation of independent professionals improved. 68% of the independent respondents report that they earn enough as freelancers, which is 500 BP higher than in 2021 (admittedly not a good year).

Nevertheless, the fact that those same earnings are still the absolute number one in stress factors for independent language professionals should not be forgotten.

The reported increase in retirement provisions seems to confirm this improvement. Those who have not made any private provision for retirement usually mention their too unstable earnings.

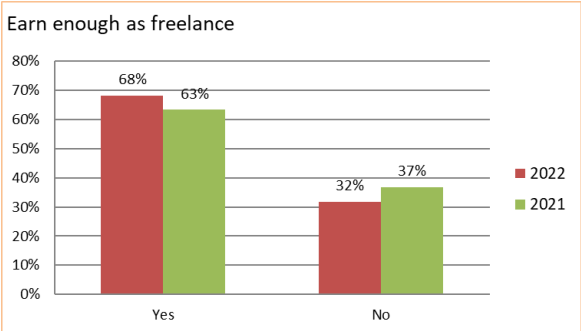


Figure 59 - Freelance earnings

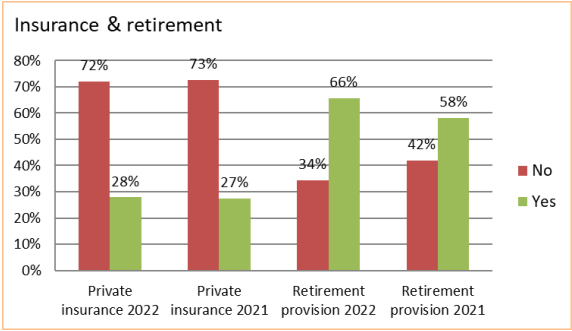


Figure 60 - Private insurance and retirement provisions

When looking at the demographic details, the results do show a significant difference in earnings increase between female and male independent professionals.

66% of female respondents earn enough with their freelance activity, compared to 73% of their male colleagues.

In 2021, this difference was much smaller (63% for female respondents and 66% for male colleagues).

The respondent's main activity defines to a considerable degree their earnings profile. Only 20% of those who are only active as interpreters have to top up their earnings with other activities, compared to 31% of those who only work as translators and 35% of those who combine both roles.

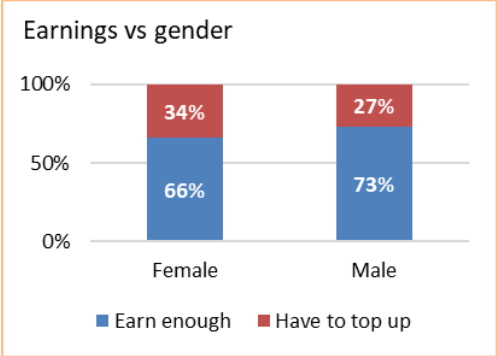


Figure 61 - Language professional earnings vs gender

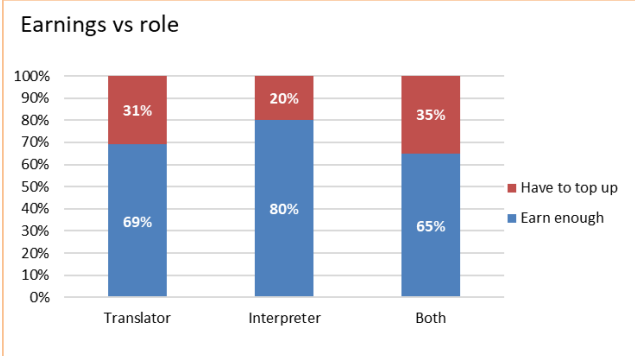


Figure 62 - Language professional earnings vs role

## Continuous professional development (CPD)

CPD (continuous professional development) plays an important role in the life of independent language professionals.

75% of the independent participants rate it as Important or Very Important. While slightly lower than in ELIS 2021, this high result is encouraging taking into account that the 2021 results were marked by a need (and opportunity) for additional training due to the Covid crisis.

We see the same evolution in the frequency of CPD trainings, which is (only) slightly lower than in 2021, and even in the subjects that are selected. Participants selected less courses related to technology (the top subject in 2021) and sales (less needed now that the activity level is restored) than in 2021.

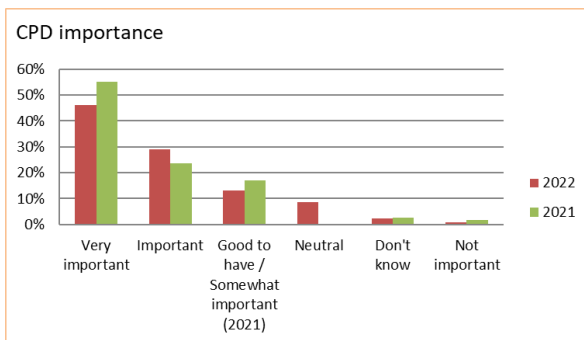


Figure 63 - Continuous Professional Development - Importance

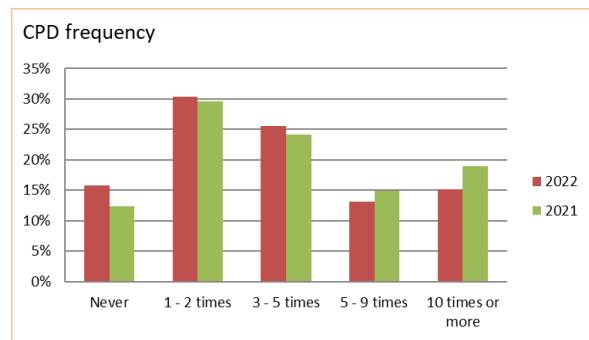


Figure 64 - Continuous Professional Development - Frequency

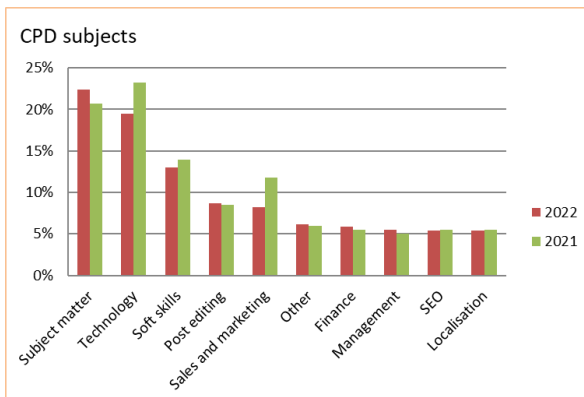


Figure 65 - Continuous Professional Development - Subjects

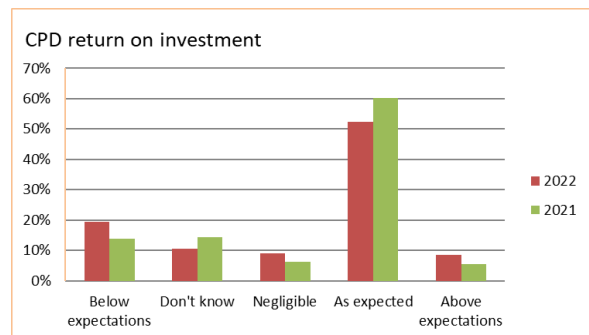


Figure 66 - Continuous Professional Development - Return on Investment

A bit disappointing is the increased number of participants that report a lower-than-expected return on their CPD investment.

## Stickiness of the language industry

Despite the average scores in terms of work-life balance and salary levels, employees of language companies are not likely to leave the industry, or even to change employer – female employees even less than their male colleagues. The higher work-life balance score given by women may explain this difference.

The slightly less than average score for pursuing a career abroad may be linked to the language industry's stickiness, but it is not clear how this score compares to other industries.

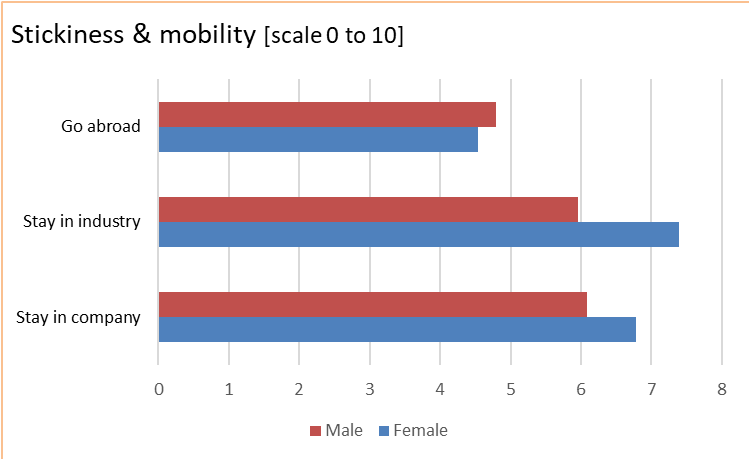


Figure 67 - Language industry 'stickiness' and mobility

# THE LANGUAGE INDUSTRY TRAINING LANDSCAPE

ELIS 2022 respondents agree with other language industry research that the industry will continue to grow. Competition for talent is identified as one of the major threats and the effort to recruit suitable resources is increasing.

In 2021, ELIS respondent indicated that they are primarily looking at the existing training programmes to supply the talent they need.

In the 2022 edition, ELIS is looking more in detail at the European language industry training landscape to identify gaps between existing training programmes and industry recruitment needs.

## Existing training programmes



Figure 68 - Language industry training landscape

View the complete programme, specialisation and language tables in the file “ELIS 2022 training landscape tables.xlsx”, available in the elis-survey.org repository.

According to ELIS 2022 results, a typical bachelor programme has some 120 students starting the programme and about half of them graduating.

Master programmes typically count approx. 50 starting students. The graduation rate obtained from the answers varies from 40 to 60% depending on the master type (40% for non-translation or interpreting masters, 50% for interpreting and 60% for translation). Comparison with data from individual universities suggests however that these percentages should be taken with some caution, since the number ranges used as answer options may allow for too wide tolerances. More detailed research using official graduation numbers is required to determine to what extent the annual number of graduates are able to meet the growing talent demand.

The language overview shows clear gaps for several EU languages, including all Nordic and Baltic languages, as well as minority languages such as Maltese and Irish. These languages are barely covered outside their native countries, both in EMT and non-EMT institutes.

In the recruiters' minds, the European Master's in Translation label, if at all known, has very little added value except in the international public agencies. EMT is completely unknown for national and local public agencies and most private enterprises.

While this result is not new, the current focus on talent management does make this into a more pressing issue.

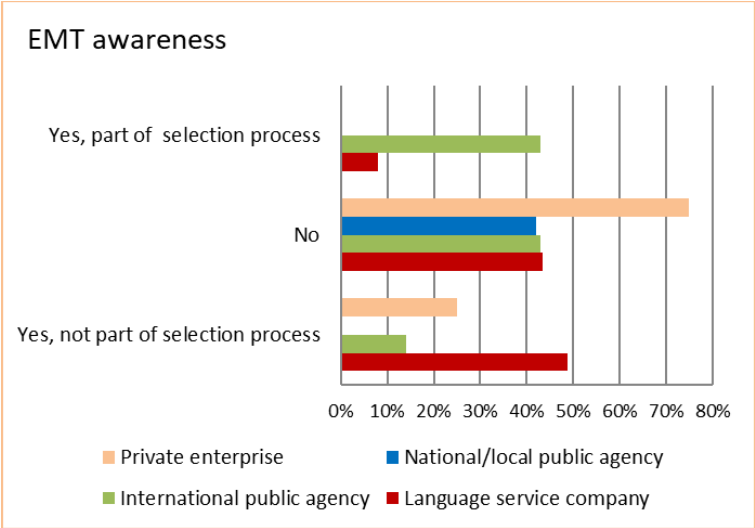


Figure 69 - EMT awareness

### Preparing for the language industry

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

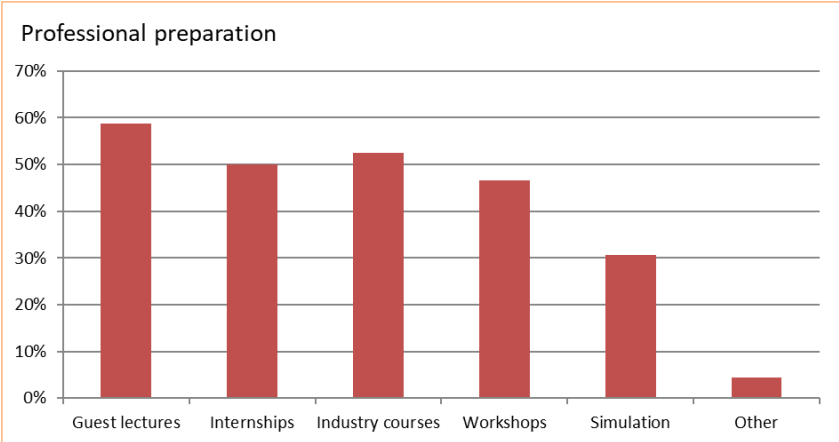


Figure 70 - Professional preparation in training programmes

50% or more respondents indicate that their training institute organises industry courses, internships or guest lectures. Workshops score slightly lower and simulation exercises, in which students have to perform assignments in a quasi-real client-provider situation, are mentioned by only 30% of the respondents.

In programmes that only include domestic internships, these are usually compulsory. International internships are typically optional. This is most probably linked to the increased complexity of organising international internships.

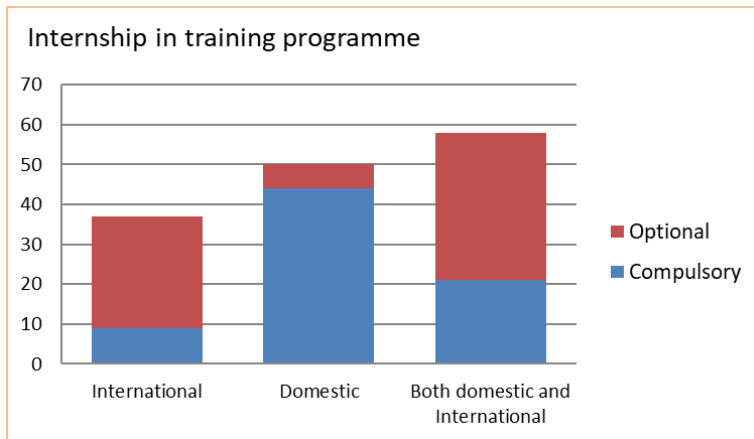


Figure 71 - Internships in training programmes

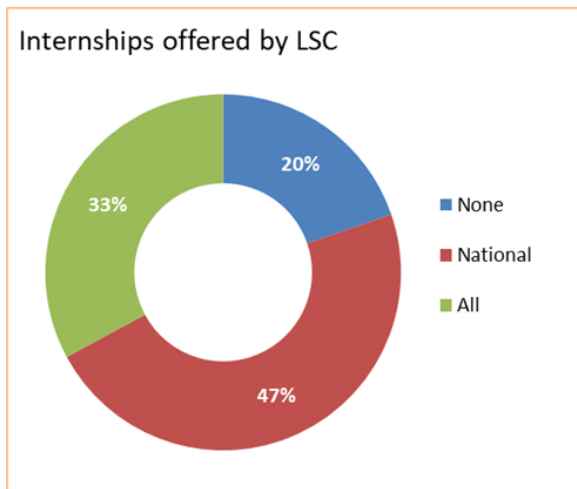


Figure 72 - Internships offered by language companies

Language company results show the same tendency: only one third of language company respondents accept international interns, while almost half accept domestic interns. 20% do not offer any internships at all.

Contrary to expectations, there is no correlation with company size or geographic location. Those who do not offer internships usually mention that it is too time consuming and lacks return on investment. Those who do offer them regularly use internships as a recruitment instrument.

Simulation exercises may or may not include commercial assignments with real clients.

To avoid friction with language service providers, training institutes often decide to restrict the assignments in terms of volume, language combination or subject area, or to allow them only for non-profit type clients.

The x-axis shows the number of answers.

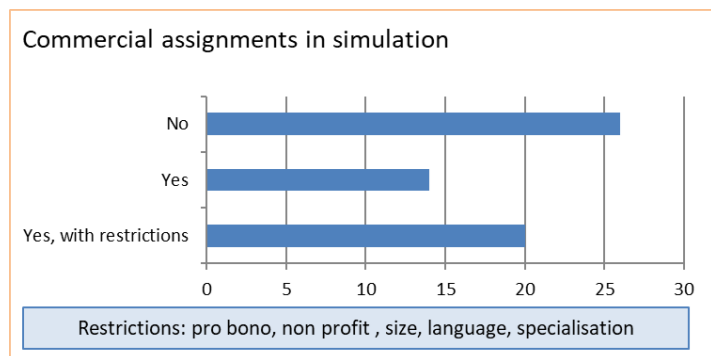


Figure 73 - Commercial assignments in simulation exercises

## Training institute expectations

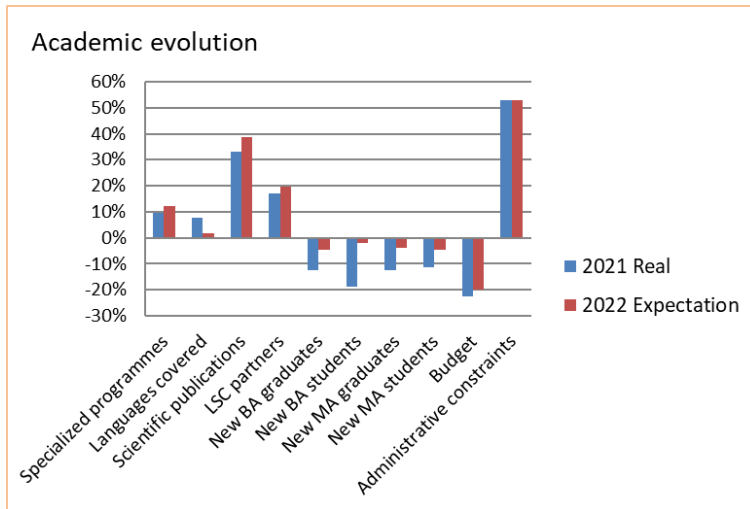


Figure 74 - Training institutes expectations regarding training activity

Training institutes do not expect much change in their programmes, nor do they expect the downturn in student numbers to end. They are downright pessimistic in terms of budget and administrative constraints. The only small bright side seems to be an increasing cooperation with language companies.

## Skills

ELIS has been monitoring the skills gap for several years. Unfortunately, the ELIS 2022 data indicate that academia and – specific parts of the - industry continue to see skills through different eyes.

In the figure below, skills are scored on a 3-point scale: Basic, Independent and Proficient.



Figure 75 - Skilled viewed by training institutes

The most striking example is translation technology. Training institutes recognise that this is important for employers, and consider that this skill (with a score of 2.2) is relatively well covered by the programme. While language departments seem to agree with that opinion, almost 70% of language company respondents flag translation technology as a gap.

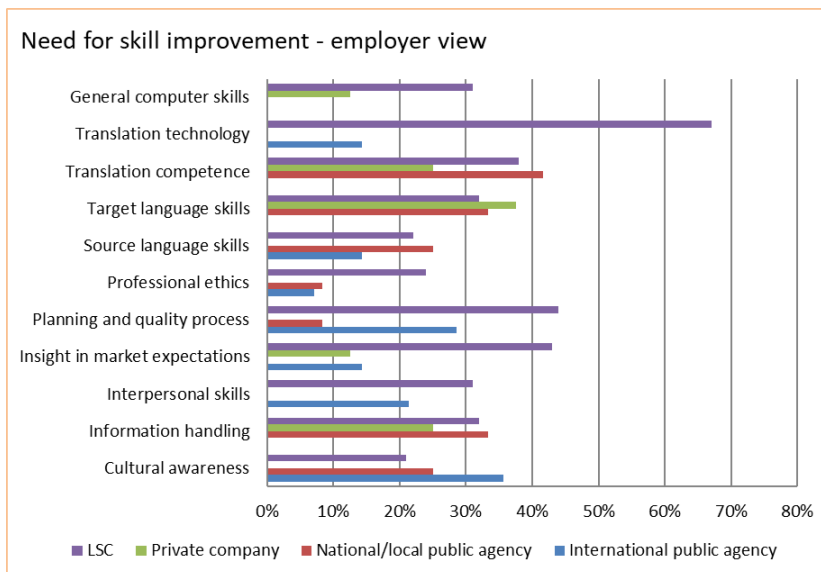


Figure 76 - Need for skill improvement according to employers

The different opinions of language companies and the various types of language departments with regard to specific topics such as target language skill and translation competence (no gap identified by international public agencies) are possibly linked to specific operational requirements or to a recruitment process that filters out candidates that are weaker in those areas.

More detailed research and closer cooperation between the training institutes and the different employer types are required to address the exact causes of these gaps.



## SOME CONCLUSIONS

The global activity growth in 2021 gave the industry the breathing space and confidence that it dearly needed.

While the Covid crisis had a very uneven impact on industry stakeholders depending on their domain or service focus, the 2021 rebound benefited all of them.

Language company development plans however show a potential risk. They are strongly in line with current activities, which means that companies are focused on doing more of the same. This may slow down plans that prepare for new disruptive events that can impact the industry.

That disruption can have beneficial effects, was proven by the explosive growth of remote interpreting (RSI), an existing technology that struggled with strong resistance but turned into a life saver faced when a worldwide pandemic made all physical events impossible.

In just 18 months' time, RSI has nearly completely filled its natural niche. It is now part of the new normal in interpreting, just as remote and hybrid working are part of the new normal in all segments of the language industry – not just for the freelance community.

Based on language department responses, outsourcing practices are not likely to change significantly, but language companies show a small tendency in favour of outsourcing to freelance resources rather than other language companies.

In recent months, other language industry research has already published findings regarding the market development. ELIS 2022 confirms those findings regarding the large-scale market trends, but contradicts some industry perceptions and statements.

In all industry segments ELIS respondents report a lower actual use of machine translation than other sources estimate, and activities with a high market news profile such as data for AI and voice services are not placed high on the radar.

High on that radar however is a concern about a shortage of suitable resources. At the same time, the data from training institutes show decreasing student numbers, persisting skill gaps and weak coverage of specific EU languages. This creates a potentially explosive cocktail which calls for a concerted action of policy makers, training institutes and industry stakeholders.

As could be expected, ELIS 2022 respondents expressed their optimism for 2022. According to their answers, 2022 would allow them to continue to develop and prosper. Provided that the market development is not disturbed by unexpected upheavals.

The Ukraine conflict broke out after the survey was closed.

Whether this conflict will turn into a disruptive event in the same way as Covid 19, is as yet unknown.

## ANALYSIS METHODOLOGY

<p>Respondents per country</p>	<p>For mature language service countries, we use 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 analysed with caution.</p>
<p>Market evolution</p>	<p>% Increase and strong increase responses - % decrease and strong decrease responses.</p> <p>For specific questions, a weighted percentage is calculated, in which Strong Increase and Strong Decrease have twice the weight of Increase and Decrease. This is indicated in the narrative text.</p>
<p>Investment mood</p>	<p><math display="block">\frac{[\text{Investment in 2020} * 2 + \text{Investment later} - \text{Disinvestment later} - \text{Disinvestment in 2020} * 2]}{\text{number of companies}}</math></p> <p>Reliability of country-specific sentiment score depends on number of responses received from the individual countries. See slide with country-specific thresholds.</p>
<p>X – axis unit</p>	<p>While the x axis typically shows percentages, this may not be the case for questions where the number of answers is limited. For those questions, the axis shows the actual number.</p> <p>In other diagrams, the axis shows the score on a scale of 0 to n, where n is determined by the number of choices offered to the respondents. In those cases, the narrative contains the necessary explanation.</p>

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