



The Language Services Market: 2010

*An Annual Review of the
Translation, Localization, and
Interpreting Services Industry*

By Nataly Kelly and Robert G. Stewart

May 2010

The Language Services Market: 2010

By Nataly Kelly and Robert G. Stewart

May 2010

ISBN 1-933555-80-7

Copyright © 2010 by Common Sense Advisory, Inc., Lowell, Massachusetts,
United States of America.

Published by:

Common Sense Advisory, Inc.

100 Merrimack Street

Suite 301

Lowell, MA 01852-1708 USA

+1.978.275.0500

info@commonsenseadvisory.com

www.commonsenseadvisory.com

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Section 107 or 108 of the 1976 United States Copyright Act, without the prior written permission of the Publisher.

Permission requests should be addressed to the Permissions Department, Common Sense Advisory, Inc., Suite 301, 100 Merrimack Street, Lowell, MA 01852-1708, +1.978.275.0500, E-Mail: info@commonsenseadvisory.com. See www.commonsenseadvisory.com/en/citationpolicy.html for usage guidelines.

Trademarks: Common Sense Advisory, Global Watchtower, Global DataSet, DataPoint, Globa Vista, Quick Take, and Technical Take are trademarks of Common Sense Advisory, Inc. All other trademarks are the property of their respective owners.

Information is based on the best available resources at the time of analysis. Opinions reflect the best judgment of Common Sense Advisory's analysts at the time, and are subject to change.

Table of Contents

Topic.....	1
Past Research on This Topic	1
Why We Wrote This Report	2
What You'll Find in This Report.....	3
Data	4
How We Identified the Global LSP Population.....	4
Validating the Targets	4
Removal of Duplicates.....	5
Post-Collection Testing and Size Adjustment	6
Where the LSPs Are Located.....	6
How We Conducted Our Global Market Survey	7
Recruitment Activities.....	7
Data Collection	8
How We Sized the Global Language Services Market	9
How Big Is the Language Services Market?	10
How Fast Is the Market Growing?	11
Differences between Past and Current Estimates.....	12
How the Recession Affected the Language Services Industry.....	13
Still, Most Companies See the Glass as Half Full.....	14
Suppliers.....	16
How We Identified the Largest Industry Providers	16
Creating a List of the World's Largest LSPs Has Its Challenges	17
A Word about Data Validation and Accuracy	18
Technical Notes on the Global Ranking.....	19
The Top 35 Global Language Service Providers.....	20
#1 – HP ACG.....	21
#2 - McNeil Technologies, Inc.....	22
#3 – Lionbridge Technologies.....	22
#4 – Language Line Holdings.....	23
#5 – SDL.....	23
#6 – TransPerfect/Translations.com.....	24
#7 – L-3 Linguist Operations & Technical Support.....	24
#8 – Manpower	25
#9 – SOS International Ltd.	25
#10 – euroscript International S.A.....	26
#11 – RWS Holdings PLC.....	26
#12 – thebigword Group	27
#13 – CLS Communication AG.....	27
#14 – Logos Group	28
#15 – Welocalize, Inc.	28
#16 – Honyaku Center, Inc.....	29
#17 – Moravia Worldwide.....	29
#18 – AAC Global Corporation	30
#19 – Semantix AB.....	30
#20 – Skrivanek Group	31

#21 – Cyracom International, Inc.	31
#22 – hiSoft Technology International Ltd.....	32
#23 – Crestec, Inc.	32
#24 – Jonckers Translation and Engineering s.a.	33
#25 – Merrill-Brink International.....	33
#26 – KERN AG	34
#27 – CBG Konsult AB.....	34
#28 – VistaTEC Ltd.....	35
#29 – SeproTec Multilingual Solutions.....	35
#30 – CSOFT.....	36
#31 – Ishida Taiseisha, Inc.	36
#32 – Language Services Associates	37
#33 – Pacific Interpreters	37
#34 – Telelingua International	38
#35 – Språkservice Sverige AB.....	38
The Largest Suppliers in Eight Major Regions of the World	39
The Top Language Service Providers in Africa	39
The Top Language Service Providers in Latin America.....	40
The Top Language Service Providers in Eastern Europe	40
The Top Language Service Providers in Asia	41
The Top Language Service Providers in Southern Europe	42
The Top Language Service Providers in Western Europe.....	42
The Top Language Service Providers in Northern Europe.....	43
The Top Language Service Providers in North America.....	44
FAQs	45
About the Companies that Appear in Our Rankings	45
About Our Ranking Methodology	46
About Subsidiaries, Business Units, and Collective Entities	48
About the Global Market Size Estimates	50
Acknowledgments	51
🌐 About Common Sense Advisory	52
🌐 Future Research.....	52
🌐 Applied Research and Advisory Services	52

Figures

Figure 1: Language Service Provider Population Density.....	7
Figure 2: Global Language Services Market Share by Region	11

Tables

Table 1: Projected Language Services Revenues and Regional Distribution	12
Table 2: The Top 35 Global Language Service Providers (2010).....	21
Table 3: The Top 5 Language Service Providers in Africa.....	40

Table 4: The Top 5 Language Service Providers in Latin America	40
Table 5: The Top 5 Language Service Providers in Eastern Europe.....	41
Table 6: The Top 10 Language Service Providers in Asia.....	41
Table 7: The Top 5 Language Service Providers in Southern Europe.....	42
Table 8: The Top 10 Language Service Providers in Western Europe	42
Table 9: The Top 15 Language Service Providers in Northern Europe	43
Table 10: The Top 15 Language Service Providers in North America	44

Topic

“How big is the global market for translation and interpreting services, and how fast is it growing?” “How many language service providers (LSPs) are there in the entire world?” “How much of the market corresponds to each region?” “Is it true that this market is recession-proof?” “Who are the biggest players?”

These are questions we hear all the time. In this report, we answer them. We also provide insight into our methodology and answer questions about the process we used to collect the data, develop our rankings, and calculate the market size.

Past Research on This Topic

Our published research on the language services market consists of more than 300 reports and briefs spanning the course of nearly a decade. These fall into three major categories:

- **Market data.** We continually measure the demand and supply sides of the market, on a regional and global scale (see “[The European Translation Market](#),” Nov09; “[Where the Translation Dollar Is](#),” Jan09; “[Language Services and the U.S. Federal Government](#),” Dec09; “[The Swedish Telephone Interpreting Market Starts to Ripen](#),” Oct09; “[For European-Chinese Relations, English is Pivotal](#),” Nov09; “[The Language Competency Continuum and Chinese LSPs](#),” Aug09; and “[Offshoring Language and IT Services to China](#),” Jul07). We also conduct regular studies on pricing and procurement (“[The Price of Translation](#),” Apr08; “[Telephone Interpretation Procurement](#),” Jun09; “[Price Pressure in Language Services](#),” Jul09).
- **Technology.** Our research frequently covers the latest technologies that affect the provision of services for both written translation and spoken language interpreting (see “[Translation Management Takes Flight](#),” Mar09; “[Opposing Views on LSP Technology Ownership](#),” Apr10; “[Localization Is Dead? Long Live Localization!](#)” Apr10; “[Translation Management Systems](#),” Sep08; “[Cloudy with a Chance of TMS Outage](#),” Dec09; “[Evolution and Revolution in Translation Management](#),” May08; “[Options in Enterprise TMS](#),” Mar09; “[The Business Case for Machine Translation](#),” Aug09; “[The Case for Terminology Management](#),” Feb09; “[TI Supply-Side Outlook](#)” Sep09; and “[Video Interpreting Usage Slowly Rises](#),” May09).

- **Best practices.** We have also written extensively about the practices – good and bad – that affect market participants that sell and buy language services (see [“The Owner’s Guide to Maximizing LSP Value,”](#) Apr10; [“Localization Return on Investment,”](#) Apr10; [“Reaching New Markets through Transcreation,”](#) Mar10; [“Marketing Language Services Online,”](#) Feb10; [“Translation and the Vertical Markets that Matter Most,”](#) Nov09; [“Best Practices for Client Review Processes,”](#) Oct09; [“Targeting Translation Buyers,”](#) Sep09; [“Non-Standard Views on Industry Standards,”](#) Sep08; and [“Buyer-Defined Translation Quality,”](#) Aug08).

For the past five years, we have also published market size estimates and rankings of the world’s largest translation and interpreting suppliers (see [“Ranking of Top 30 Language Services Companies,”](#) May09; [“Ranking of Top 25 Translation Companies,”](#) May08; [“Ranking of Top 20 Translation Companies,”](#) May07; [“Ranking of Top 20 Translation Companies,”](#) May06; and [“Ranking of Top 20 Translation Companies,”](#) July05).

Why We Wrote This Report

Industry stakeholders – and the companies that invest in them – inevitably have many questions about the language services market. In previous years, in lieu of a full report, we published a brief with information about our market size estimates, projections for the years to come, and rankings of the largest providers throughout the world.

Here are the major differences between this year’s market study and the annual rankings we’ve published in the past:

- **Format.** Each year, the number of providers in our lists has grown. As such, so has the amount of information we provide about each company – and the market at large. This year, instead of a brief of six to eight pages, we are devoting a full report to the topic.
- **Scope.** This year, in addition to publishing a global ranking of the largest providers, we are extending our rankings to more focused geographic regions based on the number of suppliers in each area. This report reveals the top-earning companies in nine parts of the world: Africa, Asia, Eastern Europe, Latin America and the Caribbean, Northern America, Northern Europe, Oceania, Southern Europe, and Western Europe.

- **Detail.** The extended format enables us to provide a great amount of detail – about the methodology we employed, the characteristics of the market, and how this research links to findings from other research studies.

What You'll Find in This Report

This report contains several major sections:

- **Data.** Here we explain our methodology and provide our market size estimates for 2010. We also include estimates for specific sectors within the global market, rates of growth, and projections for the years to come.
- **Suppliers.** In this section, we list the top providers in the world – along with profiles of each. For the first time, we also list regional rankings for eight of the nine regions with the largest market share in the world.
- **FAQs.** We answer the most frequently asked questions (FAQs) in this part of the report, shedding light on the rules of engagement for our regional and global rankings, and our process for determining the market size estimates and growth rates.