



Top 15 Telephone Interpreting Suppliers

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Last year, Common Sense Advisory published the first-ever global ranking of telephone interpreting (TI) providers, as well as estimates for the whole interpretation market (see "[Telephone Interpretation: The Supply Side](#)," Jun08). Now, in our second annual TI supplier roster, we update those estimates.

The World's 15 Largest Telephone Interpretation Suppliers

This year's ranking includes old favorites and new additions ([see Table 1](#)). The amounts we list next to each company represent telephone interpreting revenue for the 2008 fiscal year. For firms based outside the United States, we converted their financials using the average exchange rate for the 365 days of their fiscal year.

Rank	Company	Country of Headquarters	Telephone Interpretation Revenue in US\$M	Status
1	Language Line Services*	United States	236.39	Private
2	Cyacom	United States	24.80	Private
3	Manpower Business Solutions	Netherlands	20.93	Public
4	thebigword Group	United Kingdom	19.70	Private
5	Pacific Interpreters	United States	19.50	Private
6	Language Services Associates	United States	18.50	Private
7	Semantix*	Sweden	15.02	Private
8	Telelanguage	United States	15.00	Private
9	Certified Languages International	United States	10.00	Private
10	LLE	United States	7.00	Private
11	CanTalk	Canada	5.60	Private
12	LyricLabs	India	2.80	Private
13	ISM Interprétariat*	France	2.74	Private
14	Lionbridge	United States	2.40	Public
15	CTS Language Link	United States	2.00	Private

Table 1: Ranking of Top 15 Telephone Interpreting Companies for 2008
(* estimated)

Source: Common Sense Advisory, Inc.

How We Estimated the Revenue for Three Companies

We list estimated earnings for three suppliers on the list. For Language Line Services (LLS), one source of information is its 10K filing, which showed a portion of the company's telephone interpretation revenue, listed at US\$212 million. However, the amounts reported in public filings do not represent the full breadth of LLS's holdings. The firm makes use of multiple corporate shells, and that revenue is not reported under the "Language Line Inc" [10K](#).

So, the estimate we include for Language Line in this year's ranking includes both the telephone interpretation numbers reported under the official filings and the estimated TI earnings from LLS's other companies. This estimate also does not include Language Line's non-interpreting services, such as written translation. At the time LLS acquired Lingo Systems, the revenue of this translation and localization business was estimated at US\$5 to 7 million, and has likely grown since that time. Regardless, the non-interpreting business constitutes a tiny percentage of Language Line's total for 2008.

We calculated the estimates for Swedish provider Semantix and France-based ISM Interprétariat using the average rate of growth for the Top 30 language service providers (see "[Top 30 Language Service Providers](#)," May09). All other figures were reported directly to Common Sense Advisory by the companies themselves. In some cases, we saw that the amounts they provided to us conflicted with amounts reported by other sources, such as [Inc magazine](#). However, we used the numbers they entered into *our* surveys.

Three Major Phenomena Indicate the Health of the TI Industry

When comparing this year's list to last year's, we spotted three important trends that are worth noting:

- **The middle of the pack bulks up.** Last year, only three companies other than Language Line reported TI revenue of US\$10 million or more. This year, eight companies are members of this exclusive double-digit club.
- **Telephone interpreting goes global.** In our 2007 roster, we saw companies from France (ISM), Sweden (Semantix), the Netherlands (Manpower), the United Kingdom (thebigword), and Canada (CanTalk). This year, India-based Lyric Labs makes its mark as the first major Asian TI provider on our list. Companies from Spain, Japan, Germany, Italy, Korea, Australia, and China also came close to qualifying.

- TI providers are growing at a staggering rate.** The average rate of growth for the world's largest TI companies is 72.75 percent. This is largely due to the fact that some players – such as Language Service Associates (LSA), Telelanguage, and thebigword – more than doubled in size in a single year ([see Table 2](#)). Some companies reporting a reduction in revenue did so primarily due to the loss of contracts to competitors (LLE) or a change in the way they report revenue for TI services (Manpower), but both companies told us that they expected to see growth again in 2009.

Company	Revenue Growth (Reduction) from 2007 to 2008
thebigword Group	474.9%
Telelanguage	138.1%
Language Services Associates	108.0%
Certified Languages International	100.0%
Cyacom	46.6%
Language Line Services	31.0%
CanTalk	9.8%
Pacific Interpreters	9.6%
Lionbridge	6.2%
LLE	(1.4%)
Manpower Business Solutions	(21.2%)
CTS Language Link	(28.6%)

Table 2: Telephone Interpreting Revenue Growth (Reduction) by Company from 2007 to 2008

Source: Common Sense Advisory, Inc.

The Total Interpreting Market Will Reach US\$4.5 Billion in 2009

In 2009, the total language services market stands at US\$15 billion (see "[Top 30 Language Service Providers](#)," May09). Nearly a third of the global total corresponds to interpreting services ([see Table 3](#)). Of that US\$4.5 billion in interpreting services, an estimated US\$675 million were devoted to phone-based business. The remainder consisted largely of in-person interpreting services, with companies like L-3 Communications and Global Linguist Solutions falling into this category, as well as interpretation via videoconferencing – companies such as Sorenson and Purple Communications are in this group.

If we break down the US\$3.8 billion in 2008 revenue reported by the Top 30 LSPs, we see that approximately US\$1.5 billion came from interpreting services. Also, as

we noted in that ranking, we are aware of multiple suppliers – particularly military contractors – that derive very large sums from the provision of interpreting services and are not included in our ranking. The same is true of video interpreting and sign language interpreting companies that we have contacted, but who have not yet provided us with interpretation revenue data.

Region	2009 US\$ M	2010 US\$ M	2011 US\$ M	2012 US\$ M	2013 US\$ M
All language services	15,000	17,000	19,500	22,500	25,000
All interpreting services	4,500	5,100	5,850	6,750	7,500
Telephone interpreting services	675	765	878	1,013	1,125

Table 3: Projected Interpretation Revenues for 2009-2013
in U.S. Millions of Dollars
Source: Common Sense Advisory, Inc.

U.S. Suppliers Still Dominate the Telephone Interpreting Market

How does the estimated US\$675 million in outsourced telephone interpreting divide up across the globe? Not very evenly. The revenue from our Top 15 providers alone adds up to nearly US\$400 million, and nearly US\$350 million of that amount corresponds to the U.S. market. Our research shows that in 2009, a total of US\$533 million in telephone interpreting services will be delivered in the United States, while an estimated US\$142 million pertains to the rest of the world ([see Table 4](#)).

Region	Market Share	2009 US\$ M	2010 US\$ M	2011 US\$ M	2012 US\$ M	2013 US\$ M
U.S.	79%	533	604	693	800	889
ROW	21%	142	161	184	213	236
Totals	100%	675	765	878	1,013	1,125

Table 4: Projected Telephone Interpretation Revenues for 2009-2013
in U.S. Millions of Dollars
Source: Common Sense Advisory, Inc.

Our research resulted in an in-depth analysis of the underlying dynamics and market participants, which we published in a separate report on the state of the market and the outlook for the next five years ("[TI Supply-Side Outlook](#)," Sep09). The fast-changing nature of the competitive landscape for telephone interpreting services should make for many interesting developments in the years to come.