



Everest Group Trust and Safety Services PEAK Matrix[®] Assessment 2024

Focus on Accenture

April 2024



Introduction

The Trust and Safety (T&S) industry has undergone significant changes, driven by the increasing volumes and diversity of content formats, the dynamic regulatory landscape online, and the need for nuanced regional content moderation services. Further, the demand for data annotation and AI support services has increased as enterprises continue to explore the use of generative AI for content creation and moderation.

Service providers are focusing on becoming strategic partners for enterprises and helping them solve their current challenges. The current trust and safety landscape has providers across multiple categories – IT/BPO, Contact Center Outsourcing (CCO) providers, and niche/specialist providers – who are gearing to serve the diverse needs of the market. Providers are adapting to meet evolving enterprise requirements through augmented offerings, technology investments, and partnerships. Additionally, they are expanding their delivery landscapes by identifying and investing in talent-rich regions to enable localized operations.

In this research, we present an assessment and detailed profiles of 27 trust and safety providers featured on the [Trust and Safety Services PEAK Matrix® Assessment 2024](#). Each provider profile provides a comprehensive picture of its service focus, through a snapshot of its key strengths and limitations, as assessed by Everest Group. The assessment is based on Everest Group’s annual RFI process for the calendar year 2023, interactions with leading trust and safety providers, client reference checks, and an ongoing analysis of the trust and safety services market.

The full report includes the profiles of the following 27 leading trust and safety providers featured on the Trust and Safety Services PEAK Matrix Assessment 2024:

- **Leaders:** Accenture, Concentrix + Webhelp, Genpact, TaskUs, and Teleperformance
- **Major Contenders:** Alorica, Appen, Cognizant, Conectys, Foundever, GlobalLogic, ModSquad, Sutherland, TDCX, Tech Mahindra, TELUS International, transcocosmos, TTEC, Vaco, WebPurify, and Wipro
- **Aspirants:** Cogito Tech, Foiwe, ICUC Social, IntouchCX, LXT, and Pure Moderation

Scope of this report

Geography: Global

Industry: 27 trust and safety providers

Services: Trust and safety services

Trust and safety services PEAK Matrix® characteristics

Leaders

Accenture, Concentrix + Webhelp, Genpact, TaskUs, and Teleperformance

- Going beyond strengthening all-round trust and safety capabilities, Leaders are focused on becoming strategic enablers for enterprises by supporting them beyond scale and proactively serving the evolving needs of clients
- Leaders have deep domain and industry expertise. To increase the efficiency of their delivery, they are investing in technology solutions. While some of the leaders are providing end-to-end platform solutions, others are using mature technology solutions to simplify the work of moderators. Most of them are using technology to proactively monitor the wellbeing of their moderators
- Leaders are at the forefront of the adoption of generative AI for trust and safety. They are driving change with partnerships, Centers of Excellence (CoEs), investments in value-added services and AI support services, expanded offerings such as capabilities for the detection and moderation of AI-Generated Content (AIGC), and acquisitions
- They leverage their superior analytics capabilities and have set up a dedicated practice to monitor the evolution of trust and safety policies and continue providing recommendations to the client teams on closing policy gaps
- They also leverage their large scale of operation and delivery presence across onshore, nearshore, and offshore locations to provide cost arbitrage to their clients and meet their requirements for localization. They offer moderation capabilities across multiple languages and content types

Major Contenders

Alorica, Appen, Cognizant, Conectys, Foundever, GlobalLogic, ModSquad, Sutherland, TDCX, Tech Mahindra, TELUS International, transcosmos, TTEC, Vaco, WebPurify, and Wipro

- Most Major Contenders continue to focus on the wellbeing of their workforce and offer technology capabilities to their clients. While some of them have invested in developing content moderation AI technology offerings for their clients, others offer workforce management tools
- Some of these providers are focusing on offering support services to enterprises for adopting generative AI. They use generative AI solutions for internal efficiencies but have limited adoption compared to leaders
- Some Major Contenders have emerged as strong regional providers and are increasing the scope of their services

Aspirants

Cogito Tech, Foiwe, ICUC Social, IntouchCX, LXT, and Pure Moderation

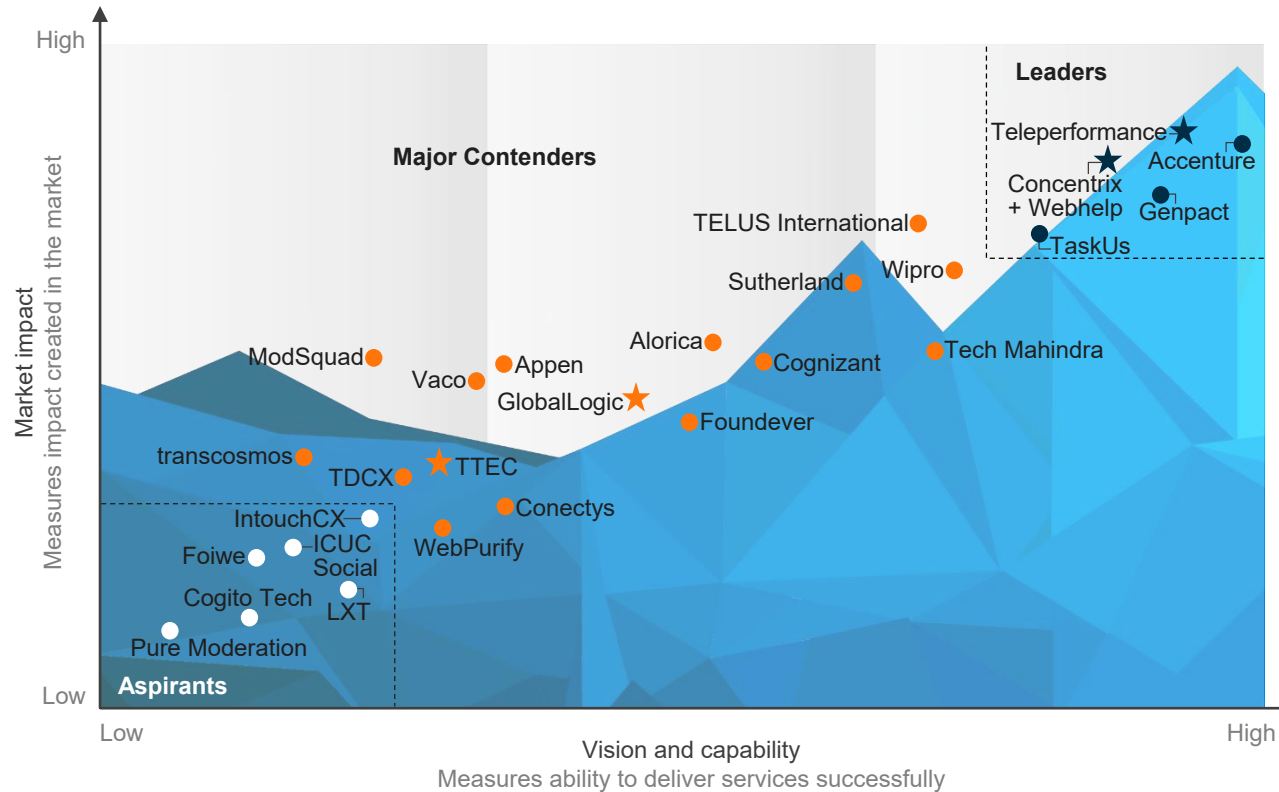
Aspirants have focused on expanding their existing trust and safety scope of services beyond niche services. While they continue to invest in technology capabilities, their current set of capabilities and limited scale may not be the best suited to handle end-to-end requirements for large organizations. The aspirants also have limited experience in handling complex and egregious forms of content

Everest Group PEAK Matrix®

Trust and Safety Services PEAK Matrix® Assessment 2024 | Accenture is positioned as a Leader

Everest Group Trust and Safety Services PEAK Matrix® Assessment 2024^{1,2,3}

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



1 Assessments for Alorica, Appen, Cogito Tech, Cognizant, Foiwe, ICUC Social, ModSquad, Pure Moderation, and TELUS International exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with trust and safety buyers

2 Analysis for Teleperformance is based on capabilities post its acquisition of Majorel

3 Assessment for Accenture and IntouchCX are based on partial primary inputs

Source: Everest Group (2024)

Accenture profile (page 1 of 7)

Overview

Company overview

Accenture is a professional services firm that assists the world's largest enterprises, governments, and other organizations in building their digital cores, optimizing their operations, accelerating revenue growth, and improving citizen services, resulting in concrete value at speed and scale. It is a talent and innovation-led company with 732,000 people serving clients in more than 120 countries. It combines its strength in technology with industry experience and functional expertise. Accenture is uniquely able to deliver tangible outcomes because of its broad range of services, solutions, and assets across Strategy and Consulting, Technology, Operations, Industry X, and Song. These capabilities, together with its culture of shared success and commitment to creating 360° value for its clients, shareholders, partners, and communities, enable it to help them succeed and build trusted, lasting relationships.

Headquarters: Dublin, Ireland

Website: www.accenture.com

Key leaders

- Andrew McGowan, Senior Managing Director and Accenture Operations Group Operating Officer
- Arundhati Chakraborty, Senior Managing Director and Global Delivery and Business Transformation Lead, Accenture Operations
- Bhavana Rao, Growth and Strategy Lead, Accenture Operations
- Sid Navelkar, Business Lead, Trust and Safety, Accenture Operations
- Amiya Sinha, Offering Lead, Trust and Safety, Accenture Operations

Distribution of FTEs across processes

● <500 FTEs ● 500-2,000 FTEs ● >2,000 FTEs

- Content curation, annotation and data analysis
- Content services
- Review and compliance
- Platform safety
- Ad review and compliance

Distribution of FTEs across languages

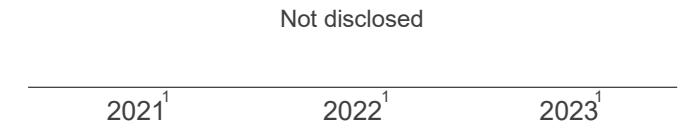
● <500 FTEs ● 500-1,000 FTEs ● >1,000 FTEs

- English
- Portuguese
- French
- Arabic
- German
- Mandarin
- Spanish
- Hindi

List of the top five niche languages in which support is provided: Estonian, Latvian, Lithuanian, Croatian, and Kashmiri

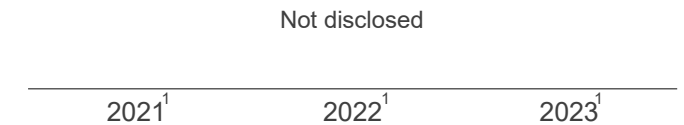
Global T&S revenue

In US\$ million



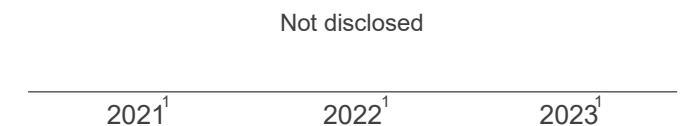
Global T&S FTEs

Number of agents (in '000s)



Global T&S client base

Number of clients



¹ 12 months ending December 31 of any particular year, i.e., from January 1, YYYY to December 31, YYYY

Accenture profile (page 2 of 7)

Key investments and partnership ecosystem

Recent T&S services-related developments/investments

Areas	Developments/investments
T&S specific technology capabilities	<ul style="list-style-type: none"> • SynOps: made digital advancements in its proprietary operating platform, SynOps for T&S that helps deliver transformation across various impact areas such as the preemptive detection of abuse, rapid and consistent decision-making, maximizing efficiencies, and driving positive experiences • Platform Operations for generative AI: expanded its platform data operations practice to incubate engagements with generative AI products in the areas of Large Language Model (LLM) operations, prompt engineering, response authoring, Supervised Fine Tuning (SFT), and Reinforced Learning through Human Feedback (RLHF); it has also built capability playbooks for these areas that can be readily used in new engagements • AI-Generated Content Moderation: developed capabilities to moderate generative AI-created content, including misinformation, copyrights, and deep fakes • Tier 2/3 Moderation: expanded its capabilities to moderate intricate cases and appeals relevant to content with greater complexity and ambiguity • Invested in Aliro Quantum, a company that offers end-to-end secure quantum networks based on multipurpose entanglement
Other developments/investments	<ul style="list-style-type: none"> • Location strategy: Accenture continues to strengthen its 21 dedicated T&S locations and leverage its larger operations footprint across 50+ global delivery centers in 33 countries for T&S services. It has expanded its delivery footprint to three new countries, including Romania, Bulgaria, and Colombia, along with new locations in India and Poland • Risk and governance: Accenture's T&S operating guidelines along with a strong governance and risk function, including location strategy, night shift, availability of well-being coaches, and other guidelines, enables platforms to operate T&S functions with responsibility • ESG Initiatives: Accenture's T&S operating principles, together with an effective governance and risk function, assist its clients in building and operating T&S functions responsibly, as well as achieving ESG goals

Recent T&S wellness developments/investments

- weCare technology, a data-driven worldwide mental health and wellness support program for thousands of employees working with problematic content for T&S customers
- Recent advancements include:
 - Custom coaching tool for proactive scheduling of individual and group sessions with on-demand access to eCoaching Chatbot with 90+ program and tool topics
 - Customized resilience plans to enable individuals to manage their journeys with 400+ third-party licensed mental health professionals
 - Coach simulator, a tool to assess wellness requirements and optimize wellness coach allocation for 24/7/365 support and coverage
 - Continued partnerships with external agencies such as Calm, Better Up, Thrive Global, and the Flourishing Center to enrich the resilience journey
- Continued to improve its range of wellness programs and technologies to offer a more tailored well-being and resilience journey for the whole T&S workforce

Key partnerships (representative list)

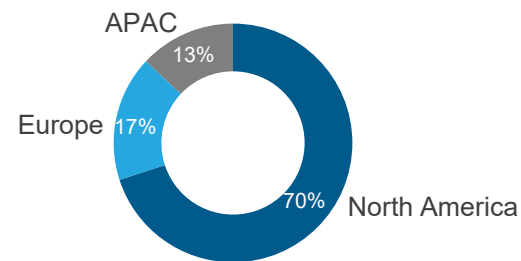
Name of Partner	Area of Partnership
Cyacomb	Child Sexual Abuse Material (CSAM) content moderation
Headspin Inc.	Application compliance
Active Fence	Cybersecurity
AWS, Google, Azure, and Hugging Face	LLM providers
Omni Page, Azure, Google, and AWS	Digitalization providers
SDL, Geofluent, Azure, Google, and AWS	Translation providers
Speech Matic, Azure, Google, and AWS	Transcription providers

Accenture profile (page 3 of 7)

Client portfolio

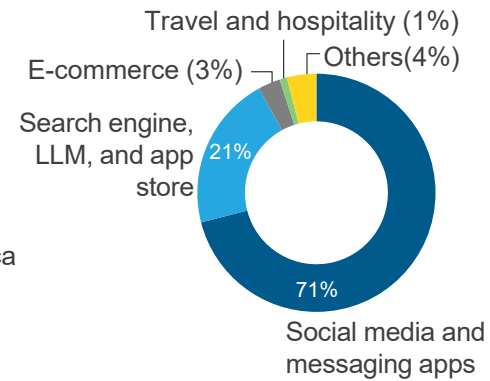
Trust and safety revenue mix by geography

Revenue in US\$ million
100% = Not disclosed



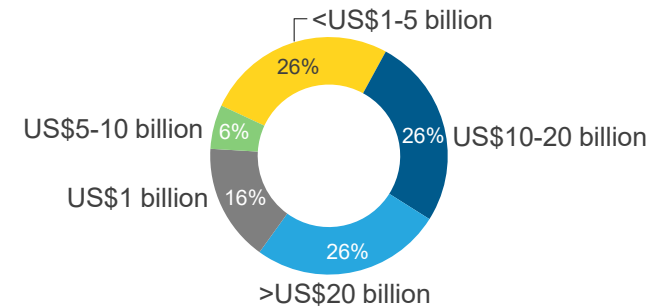
Trust and safety revenue mix by industry

Revenue in US\$ million
100% = Not disclosed



Trust and safety number of clients by buyer size

Number of active clients
100% = Not disclosed



Trust and safety mix by process

Revenue in US\$ million
100% = Not disclosed

Not disclosed

Key trust and safety engagements

Client name	Work type	Region	Client since
A generative AI product company	Review and compliance	Global	Not disclosed
A social media platform	Review and compliance, content curation, annotation, and data analysis, platform safety, and ad review and compliance	Global	Not disclosed
An app marketplace	Review and compliance and platform safety	Global	Not disclosed
A video sharing platform	Review and compliance, platform safety, content curation, annotation, and data analysis, and ad review and compliance	Global	Not disclosed

* Others include gaming and legal betting, streaming services and publishers, other AI companies, BFSI and FinTech, etc.

Accenture profile (page 4 of 7)

Technology solutions/tools other than generative AI

Solution name	Year launched	Description	No. of BPS clients
T&S platform	N/A	It is an end-to-end content moderation platform for agile content moderation teams. It is designed in a modular architecture with a plug-and-play feature enabling teams to selectively deploy in-house AI services and third-party API services as required and can handle multiple content types across industries such as social media, e-commerce, gaming, and streaming services.	N/A
Content pre-screening	N/A	It is a collection of AI-based tools used for scanning and presenting content analytics in turn for improving speed and accuracy.	N/A
Standard Quality Framework	N/A	It is a platform that manages end-to-end quality, including audits, process knowledge assessments, policy updates, performance analysis, and dashboarding for trust and safety teams.	N/A
Decision assist tools	N/A	It is a tool that promotes the formation of a simulated decision tree that assists agents in making accurate decisions without the need to check the policy documents or consult SMEs.	N/A
Intelligent Workforce	N/A	It is an advanced tool for managing the workforce and tracking the team's effectiveness in aggregate. It offers additional features such as resource forecasting and scheduling, which improve overall operational planning and governance.	N/A
CSAM screening tool	N/A	It is a tool to auto-screen CSAM content, safeguard users on the client platform, and limit the exposure of moderators to harmful content.	N/A
Trend Spotter	N/A	It is a patented social sensing tool to analyze and identify top trending global events in news websites and social media, enabling T&S teams to take proactive measures against volume surges on trending topics and increases in violating content.	N/A
Process Maturity Measurement Tool	N/A	It assesses the maturity of any T&S program across the key levers of policy, practice, and platform, and helps in improving performance by benchmarking processes against best practices and projects.	N/A
Insight generation tools	N/A	These capture violation trends observed on the platform by agents and generate insights to mitigate policy gaps, identify training needs, and inputs for the enhancement of the AI classifiers for volume obviation.	N/A
weCare Coaching Tool (weCare Tech)	N/A	It is a tool to effectively manage the wellness program (weCare), allowing moderators and coaches to schedule on-demand coaching sessions based on wellness needs. Additionally, the tool enables the leadership to track wellness activities, ensuring continuous governance of moderator wellbeing.	N/A
Wellbeing Analytics Tool (weCare Tech)	N/A	It generates actionable insights from wellness surveys, enabling leads to gauge moderator sentiment and deploy proactive interventions to improve overall wellbeing.	N/A

Accenture profile (page 5 of 7)

Generative AI solutions/tools

Solution name	Description	No. of BPS clients
Center for Advanced AI	Accenture's COE sets the standard of excellence in areas such as talent, governance operations model, organization model, and technology. The AI COE offers a comprehensive framework for guidance on AI strategy, best practices, governance, AI platforms & assets, Responsible AI frameworks, applied research, and network of AI partners	N/A
Generative AI studios	It is a network of studios that offers a full range of generative AI capabilities to facilitate organizational transformation and streamline business operations	N/A
Writer	It is a platform that helps businesses produce and shape content by utilizing generative AI. It is intended to assist enterprises in implementing AI-driven apps that can boost output and have a big commercial impact on a variety of organizational areas, including support, operations, product, sales, HR, and marketing	N/A
Content Pre-screening Tools	It is a suite of AI-powered tools for pre-screening and auto-classifying content across wide-range of policy violations, thereby improving moderation efficiencies. It includes generative AI enhancements that enable moderators to review multi-lingual content, detect violations faster and with greater accuracy	N/A
Suite of agent assist tools	It comprises a suite of Generative AI powered tools to improve agents' speed to proficiency, productivity and quality.	N/A
Generative AI Powered 360° Sentiment Analyzer	It processes large volumes of unstructured data from various channels to help clients to proactively address issues related to the appeals management for advertisers, creators, and developers	N/A

Accenture profile (page 6 of 7)

Key locations












Accenture profile (page 7 of 7)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact

Vision and capability

Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- Accenture provides services across all work types within the trust and safety value chain with a focus on clients in the social media and messaging apps, streaming and publishing services, and search engine, LLMs, and app store industries
- It deploys generative AI for improving internal efficiencies. It has developed a suite of generative AI-powered pre-screening tools for multi-lingual content review and violation detection
- It offers capabilities for the detection and moderation of AIGC. Additionally, it provides AI support services, including LLM domain-specific data creation, prompt engineering, AI training for relevance refinement, AI bias detection, and RLHF, aiding enterprises in constructing secure generative AI solutions
- Accenture has strengthened its global delivery footprint by expanding to regions such as Romania, Bulgaria, and Colombia and new locations in Poland and India. This will enable Accenture to support clients from Europe who are looking for delivery from these locations due to increasing localization requirements and regulatory mandates
- Buyers have acknowledged its strengths in the areas of domain expertise, wellness initiatives, and relationship management

Limitations

- Accenture primarily focuses on large and midsize clients for growth and has limited coverage for small buyers. Additionally, it lags some of its peers in offering trust and safety services to clients in the BFSI and Fintech and gaming and legal betting industries
- Accenture's delivery from emerging delivery locations such as the Middle East and Africa remains limited
- Buyers expect Accenture to improve pricing competitiveness and cross-leverage broader institutional knowledge

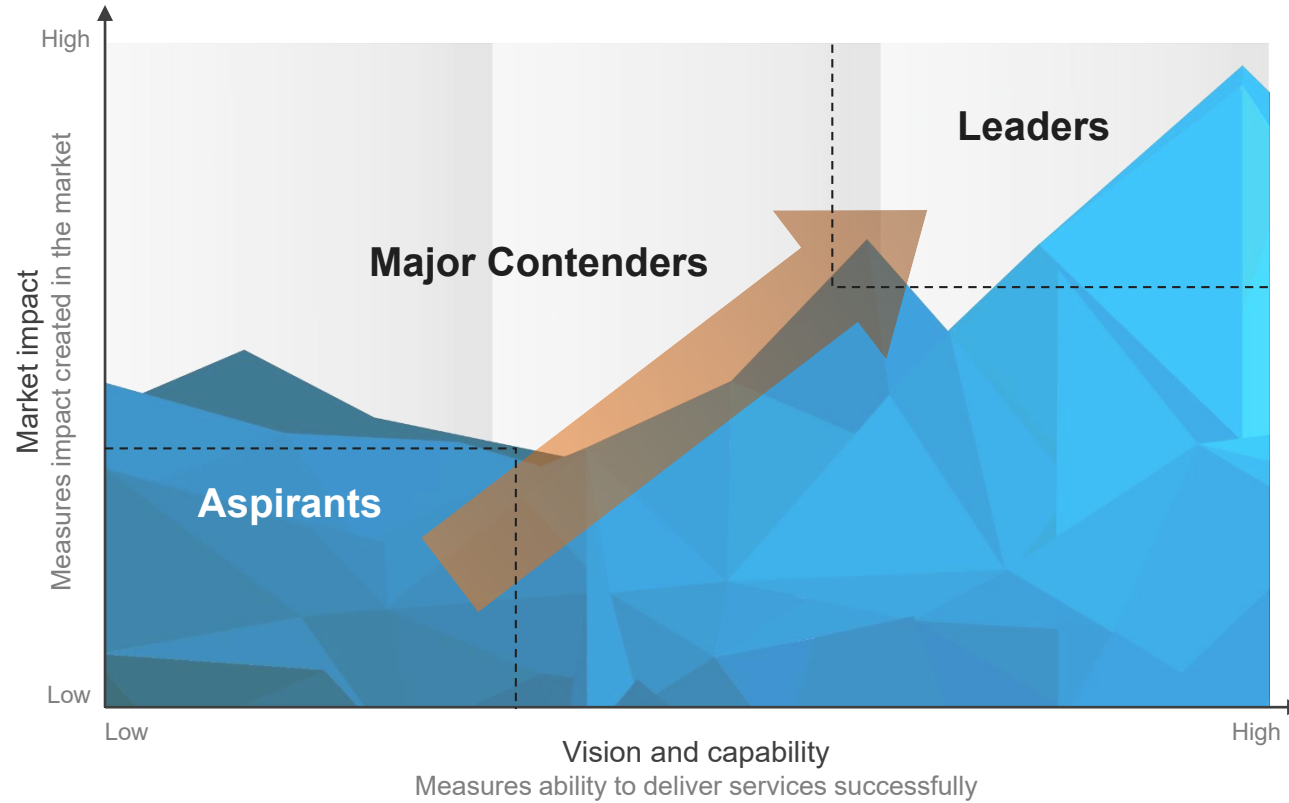
Appendix

PEAK Matrix framework

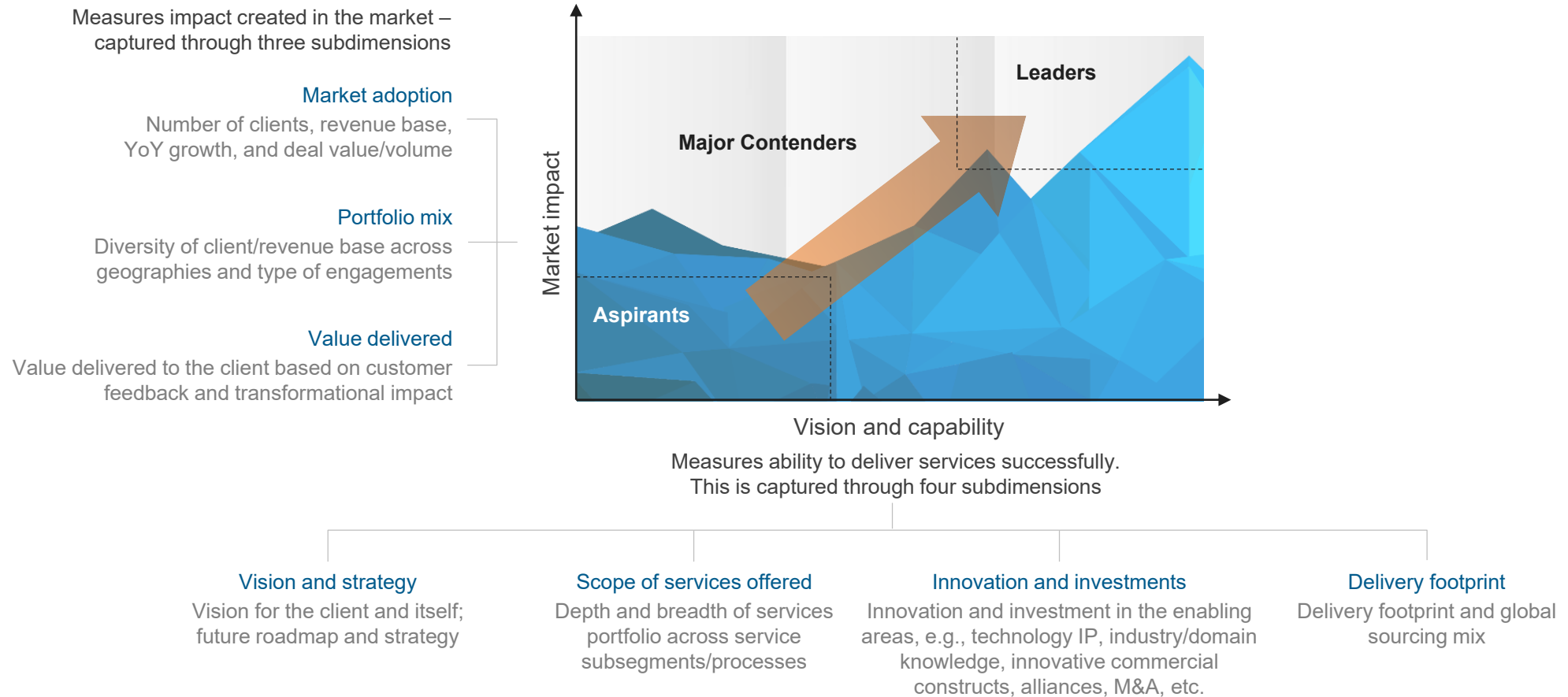
FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

Everest Group PEAK Matrix



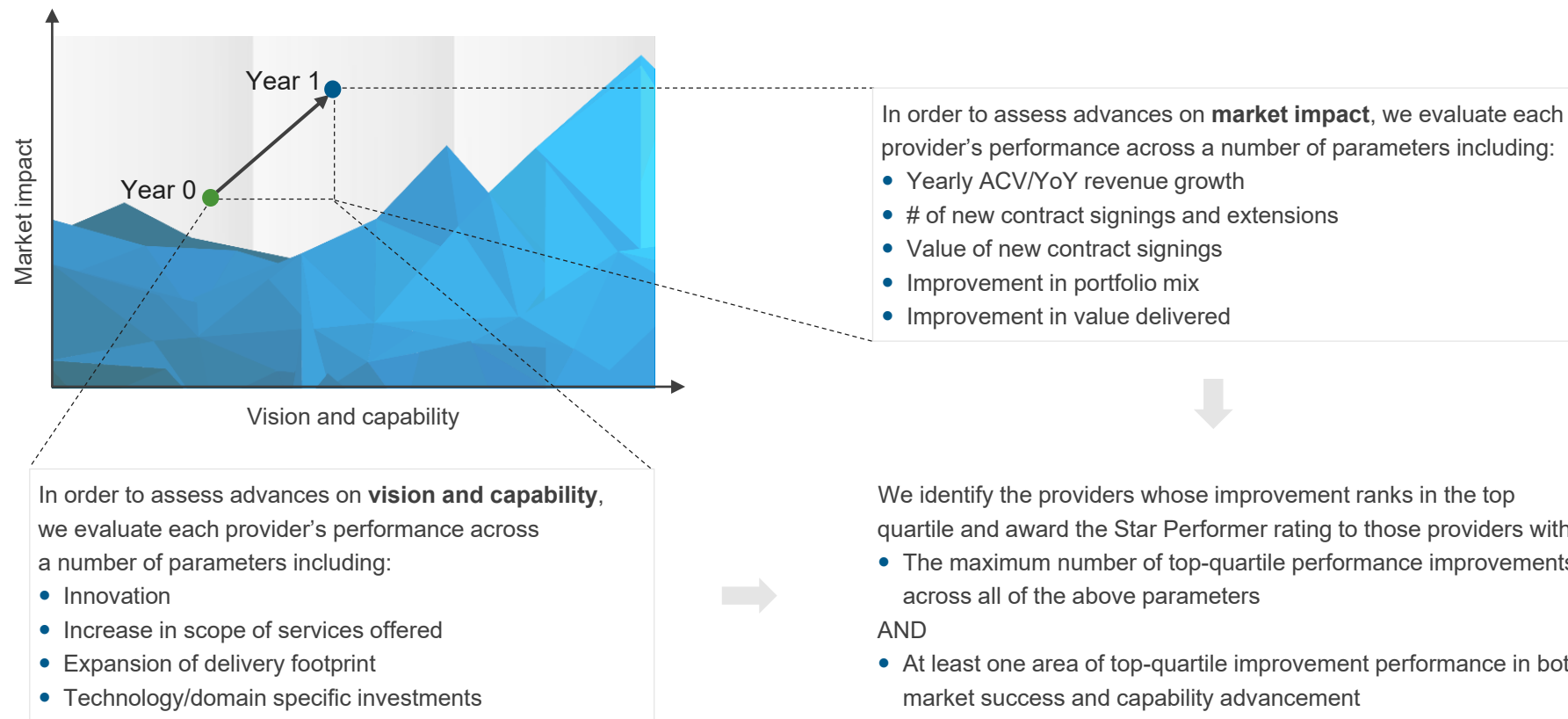
Services PEAK Matrix® evaluation dimensions



Everest Group confers the Star Performer title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



The Star Performer title relates to YoY performance for a given provider and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

- For providers
 - The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
 - In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

Stay connected

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