

Trust and Safety Services – Provider Compendium 2023

May 2023: Complimentary Abstract / Table of Contents



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Trust and Safety

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- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Pricing Analytics as a Service
- ▶ Process Mining
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG Information Technology
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
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- ▶ Technology Skills and Talent
- ▶ Trust and Safety
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Tracking: providers, locations,
risk, technologies

Locations: costs, skills,
sustainability, portfolios

Contents

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1. Introduction and overview	5
• Research methodology	6
• Trust and safety value chain	7
• Introduction	10
2. Trust and safety services PEAK Matrix® characteristics	11
• PEAK Matrix framework	12
• Everest Group PEAK Matrix for trust and safety services	15
• Characteristics of Leaders, Major Contenders, and Aspirants	16
• 2022-23 Star Performer	17
• Service provider capability summary dashboard	18
3. Enterprise sourcing considerations	22
• Leaders	22
– Accenture	23
– Concentrix	28
– Genpact	33
– Majorel	38
– TaskUs	41
– Teleperformance	46
• Major Contenders	50
– Alorica	51
– Appen	56
– Cognizant	60

Contents

• Major Contenders (continued)	
– Conectys	65
– Foundever	70
– GlobalLogic	75
– ModSquad	80
– Sutherland	85
– TDCX	90
– Tech Mahindra	95
– TELUS International	100
– Vaco	105
– Webhelp	110
– WebPurify	115
– Wipro	120
• Aspirants	125
– Cogito Tech	126
– HGS	131
– LXT	135
– TTEC	140
5. Appendix	145
– Glossary	146
– Research calendar	147

Introduction

Trust and safety has evolved from being a cost function to a strategy function. With the rise of new content types such as generative AI, Metaverse at a fast pace, enterprises are faced with newer challenges. Enterprises are focused on providing a safe experience to their users amid increasing regulatory scrutiny. Providers play a significant role in supporting enterprises in keeping their platform safe at scale by providing large talent pool to cater to the localization needs. The current trust and safety landscape has service providers across multiple categories – IT/BPO, Contact Center Outsourcing (CCO) providers, and niche/specialist providers – who are gearing up to serve the diverse needs of the market.

Service providers are focusing on becoming strategic partners of enterprises and helping them solve these challenges. Going beyond operational challenges, now service providers are working on identifying trends across services of moderation, user safety, identity theft to proactively help enterprises keep their users safe on the platform.

In this research, we present an assessment and detailed profiles of 25 trust and safety providers featured on the [Trust and Safety Services PEAK Matrix® Assessment 2023](#). 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 calendar year 2022, interactions with leading trust and safety providers, client reference checks, and an ongoing analysis of the trust and safety services market.

This report includes the profiles of the following 25 leading trust and safety providers featured on the Trust and Safety PEAK Matrix:

- **Leaders:** Accenture, Concentrix, Genpact, Majorel, TaskUs, and Teleperformance
- **Major Contenders:** Alorica, Appen, Cognizant, Conectys, Foundever, GlobalLogic, ModSquad, Sutherland, TDCX, Tech Mahindra, TELUS International, Vaco, Webhelp, WebPurify, and Wipro
- **Aspirants:** Cogito Tech, HGS, LXT, and TTEC

Scope of this report



Geography
Global



Providers

This research covers the following 25 trust and safety service providers: Accenture, Alorica, Appen, Cogito Tech, Cognizant, Concentrix, Conectys, Foundever, Genpact, GlobalLogic, HGS, LXT, Majorel, ModSquad, Sutherland, TaskUs, TDCX, Tech Mahindra, Teleperformance, TELUS International, TTEC, Vaco, Webhelp, WebPurify, and Wipro



Services
Trust and safety services

Overview and abbreviated summary of key messages

Everest Group’s Trust & Safety Services Provider Compendium 2023 provides accurate, comprehensive, and fact-based snapshots of 25 trust and safety services providers. The compendium will enable providers to benchmark their capabilities against their competitors, while buyers of trust and safety services will be able to assess the providers based on their desired set of capabilities.

Some of the findings in this report, among others, are:

Everest Group Trust and Safety Services PEAK Matrix® Assessment 2023

- Everest Group classified 25 trust and safety service providers on Everest Group PEAK Matrix® into three categories of Leaders, Major Contenders, and Aspirants
- Accenture, Concentrix, Genpact, Majorel, TaskUs, and Teleperformance are Leaders
- Alorica, Appen, Cognizant, Conectys, Foundever, GlobalLogic, ModSquad, Sutherland, TDCX, Tech Mahindra, TELUS International, Vaco, Webhelp, WebPurify, and Wipro are Major Contenders
- Cogito Tech, HGS, LXT, and TTEC are Aspirants
- Everest Group also identified Alorica, TaskUs, and Tech Mahindra as the Star Performers. This recognition is based on these providers’ relative year-over-year movement on the PEAK Matrix®

Key insights on trust and safety services providers

- The report provides an overview of each provider and any recent developments/investments made by them
- It provides insights on provider client portfolios, their key delivery locations, and their proprietary tools/solutions
- It highlights the key strengths and limitations of providers, as assessed by Everest Group

The Trust and Safety Services Provider Compendium 2023 report has 25 provider profiles

Trust and Safety Services – Provider Compendium 2023

Provider 1 | T&S services profile (page 1 of 5) Overview

Company overview
Provider 1 is a digital customer experience technology and service provider that offers a range of customer experience solutions to organizations worldwide, across every industry. Provider 1 is an end-to-end provider of customer engagement services, including next-generation digital and cognitive technology to design, build, and launch conversational messaging, CRM, automation, and analytics solutions. Provider 1 is a provider of Excellence (CoE) that provides digital customer engagement solutions for fraud prevention, and data annotation solutions.

Headquarters: V

- Key leaders**
- **Leader 1, Chairman and Chief Executive Officer**
 - **Leader 2, Chief Financial Officer**
 - **Leader 3, Chief Executive Officer, Provider Engage**
 - **Leader 4, Chief Executive Officer, Provider Digital**

Trust and safety services	2020 ¹
Revenue (US\$ million)	30-35
Number of FTEs ²	1,600-1,800
Number of gig workers	
Number of clients	7-10

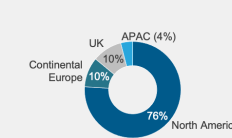
¹ 12 months ending December 31 of any particular year, i.e., from January 1 to December 31 of any particular year.

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Trust and Safety Services – Provider Compendium 2023

Provider 1 | T&S services profile (page 2 of 5) Client portfolio

Trust and safety revenue mix by geography
Revenue in US\$ million
100% = 45-50



Key trust and safety engagements

Client name	Worldwide
A leading online retail marketplace	Rev
A leading online travel and hospitality marketplace	Con
A leading employment marketplace in Australia	Ad r
A leading US-based retail coupons site	Ad r
A leading online travel company in India	Not
A leading affiliate marketing service provider	Ad r
A leading US-based travel company	Plat

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Provider 1 | T&S services profile (page 3 of 5) Key delivery locations



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Trust and Safety Services – Provider Compendium 2023

Provider 1 | T&S services profile (page 4 of 5) Technology solutions/tools

Technology name	Year launched	Deployment
Technology 1	2020	It is
Technology 2	2020	It is
Technology 3	2019	It is
Technology 4	2018	It is
Technology 5	2018	It is
Technology 6	Not disclosed	It is
Technology 7	Not disclosed	It is
Technology 8	Not disclosed	It is

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Provider 1 | T&S services profile (page 5 of 5) Everest Group assessment – Aspirant

Measure of capability: Low High

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

Strengths

- Provider 1 has experience in offering trust and safety services to both large and small buyers across the spectrum of industries
- It has a specialized focus on platform safety with expertise in offering user safety and authentication as well as identity theft prevention
- Apart from offering the traditional in-center delivery, it also offers clients the flexibility to choose from other staffing models. While the core force consists of full-time associates working in a hybrid model, flex force has part time associates with greater flexibility. As per client requirement, it also engages with gig workers

Limitations

- Provider 1 does not offer content moderation AI technology to its clients. Hence, buyers who require technological enablement may not find its offering compelling
- While Provider 1 has experience in handling text and image content, its ability in handling audio, and video content remains untested
- Since its portfolio is skewed toward single-country deals, its ability to scale up and deliver global level deals have not been unequivocally proven
- Provider does not offer long-term, post-exit wellbeing support to its trust and safety workforce

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Research calendar

Trust and Safety

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Taming the Hydra: Trust and Safety (T&S) in the Metaverse	July 2022
Wisdom of the Crowd: The Gig Delivery Model in Trust and Safety (T&S)	August 2022
Braving New Frontiers: Trust and Safety State of the Market Report 2022	August 2022
What's the Deal? Evolving Sourcing Priorities in Trust and Safety	November 2022
Content Moderation Catch 22: Walking the Regulatory Tight	December 2022
A Beautiful Mind: Ensuring Moderator Wellbeing	December 2022
Webinar Deck: Key Themes to Help Analyst Relations (AR) Teams Navigate 2023 an AR Professional Exclusive Webinar	January 2022
Webinar Deck: Sustainability in the New Year: Follow Through on Resolutions for People and the Planet	February 2023
Trust and Safety Services PEAK Matrix® Assessment 2023	March 2023
Key "Tech" Away: Technology Providers in the T&S Landscape	April 2023
Press Play on Player Experience: Level up Beyond Game Design	April 2023
Trust and Safety Services – Provider Compendium 2023	May 2023
Trust and Safety Services State of the Market 2023	Q2 2023
Content Moderator of the Future	Q3 2023

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