



Trust and Safety Services – Provider Compendium 2024

May 2024: Complimentary Abstract / Table of Contents

Provider Compendium
Trust and Safety



Our research offerings

This report is included in the following research program(s):

Trust and Safety

- ▶ Amazon Web Services (AWS)
- ▶ Application Services
- ▶ Artificial Intelligence (AI)
- ▶ Asset and Wealth Management
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
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- ▶ Contingent Workforce Management
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- ▶ CX Excellence
- ▶ CXM Technology
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- ▶ Cyber Threat Detection and Response
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Employee Experience Management (EXM) Platforms
- ▶ Employer of Record (EOR)
- ▶ Engineering Research and Development
- ▶ Enterprise Platform Services
- ▶ Exponential Technologies
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- ▶ Financial Crime and Compliance Operations
- ▶ Financial Services Technology (FinTech)
- ▶ Forces & Foresight
- ▶ GBS Talent Excellence
- ▶ Global Business Services
- ▶ Google Cloud
- ▶ HealthTech
- ▶ Human Resources
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Excellence
- ▶ IT Talent Excellence
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Microsoft Azure
- ▶ Microsoft Business Application Services
- ▶ Modern Application Development (MAD)
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Price Genius – AMS Solution and Pricing Tool
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG IT Services
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Value and Quality Assurance (VQA)

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Tracking: providers, locations, risk,
technologies

Locations: costs, skills, sustainability,
portfolios

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Background of the research

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 T&S 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 T&S providers. Each provider profile provides a comprehensive picture of its scale of operations, recent developments and investments, T&S-specific technology solutions (including generative AI solutions), other technology capabilities, wellbeing initiatives, and delivery locations. The assessment is based on Everest Group's annual RFI process for the calendar year 2023, interactions with leading T&S providers, client reference checks, and an ongoing analysis of the T&S services market.

This report includes the profiles of the following 27 leading T&S service providers: Accenture, Alorica, Appen, Concentrix, Cognizant, Cogito Tech, Conectys, Foiwe, Foundever, Genpact, GlobalLogic, ICUC Social, IntouchCX, LXT, ModSquad, Pure Moderation, Sutherland, TaskUs, TDCX, Tech Mahindra, TTEC, Teleperformance, TELUS International, transcosmos, Vaco, Wipro, and WebPurify

Scope of this report

Geography: Global

Provider: 27 T&S providers

Services: T&S services

Overview and abbreviated summary of key messages

Everest Group's Trust & Safety Services Provider Compendium 2024 provides accurate, comprehensive, and fact-based snapshots of 27 trust and safety services providers. The compendium will enable buyers of trust and safety services to understand the offering and assess the capabilities of different providers.

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

Trust and Safety Services PEAK Matrix® Assessment 2024

- Everest Group classified 27 T&S service providers on Everest Group PEAK Matrix® into three categories of Leaders, Major Contenders, and Aspirants
- Featured players include Accenture, Alorica, Appen, Concentrix, Cognizant, Cogito Tech, Conectys, Foiwe, Foundever, Genpact, GlobalLogic, ICUC Social, IntouchCX, LXT, ModSquad, Pure Moderation, Sutherland, TaskUs, TDCX, Tech Mahindra, TTEC, Teleperformance, TELUS International, transcocosmos, Vaco, Wipro, and WebPurify

T&S service provider characteristics

- Leading providers are becoming strategic enablers for enterprises by supporting them beyond scale and proactively serving clients' evolving needs
- Providers are prioritizing the well-being of their workforce. Some are investing in developing in-house tools and partnering with technology providers, while others are offering workforce management tools
- Providers are building delivery presence across onshore, nearshore, and offshore locations to provide cost arbitrage to their clients and meet their requirements for localization
- Some providers have also emerged as strong regional providers and are increasing the scope of their services services

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

The Trust and Safety Services Provider Compendium 2024 has 27 provider profiles

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Provider 1 profile (page 1 of 5)

Overview

Company overview
 Provider 1 is a provider of digital CX solutions, assisting brands in achieving client aspirations by leveraging technology.

Headquarter(s):

Key leaders

- Leader 1, Chief Executive Officer
- Leader 2, Chief Financial Officer
- Leader 3, EVP Corporate Development

Distribution of FTEs across processes

- Content curation, annotation and data analysis
- Content services

Distribution of FTEs across languages

- English
- Portuguese

List of the top five niche languages in which support is provided

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

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Provider 1 (page 2 of 5)

Key investments and partnership ecosystem

Recent T&S services-related developments/investments

Areas	Developments/investments
T&S specific technology capabilities	Solution 1: It increases and stabilizes the overall resources such as HC, training knowledge, support, and learning hours
ESG initiatives	Provider 1 is working toward carbon neutrality in its operations. Additionally, it practices Diversity, Equity, and Inclusion (DEI) initiatives and impact-sourcing programs to include individuals with disabilities, and employees from various countries in the workplace
Other developments/investments	<ul style="list-style-type: none"> • Project 1: It is an accelerator, with over 1,500 clients for all generative AI use cases across various industries, including AI training/testing, content rating, writing and editing, and more. • Project 2: Leverages Power BI to manage financial services to clients across various countries

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Provider 1 profile (page 3 of 5)

Client portfolio

Trust and safety revenue mix by geography

Revenue in US\$ million
100% = 60-65

Geography	Percentage
APAC	99%
LATAM	1%

Key trust and safety engagements

- Client name: A US-based large software company
- A large social media company
- One of the world's largest retail e-commerce companies

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Provider 1 profile (page 4 of 5)

Technology solutions/tools other than Trust and Safety

Solution name	Year launched	Description
Technology 1	2023	It is an AI-powered content moderation tool that helps brands manage user-generated content and reduce manual review time.
Technology 2	2023	It provides a platform for brands to manage their social media presence and engage with their audience.
Technology 3	2023	It is a social media monitoring tool that helps brands track their brand mentions and sentiment across various social media platforms.
Technology 4	N/A	It aids in the identification and removal of harmful content from social media platforms.

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Provider 1 profile (page 5 of 5)

Generative AI solutions/tools

Solution name	Description	No. of BPS clients
Solution 1	It is a generative AI custom-built solution that empowers businesses and teammates to operate more efficiently and swiftly, thereby minimizing manual work and the risk of errors.	N/A
Solution 2	It is a knowledge management platform that enables businesses to turn complex processes into clear actions. Integrated with Open AI GPT, it provides efficient, personalized, and tailored solutions.	N/A
Solution 3	It is a generative AI tool that enables businesses to turn complex processes into clear actions. Integrated with Open AI GPT, it provides efficient, personalized, and tailored solutions.	N/A

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Research calendar

Trust and safety services

	Published	Current release	Planned
Reports title	Release date		
Augmented Intelligence: The Future of Trust and Safety (T&S) is Humans + AI			September 2023
Safeguarding Brand Reputation in the Digital Era			September 2023
Webinar Deck: The Evolved Trust and Safety Industry and What to Expect Next			October 2023
From Gatekeepers to Guides			December 2023
AI in the Driver's Seat			December 2023
R'AI'sing the Bar: The Enhanced Role of AI in Ensuring Safe Digital Spaces in the Future			January 2024
Webinar Deck: Impact Sourcing: Empowering Communities, Transforming Business, and Creating Long-term Impact			February 2024
The Morphing Face of Threats			February 2024
Trust and Safety Services PEAK Matrix® Assessment 2024			March 2024
Preserving the Ballot: The Role of Trust and Safety in Election Misinformation			May 2024
Trust and Safety Services – Provider Compendium 2024			May 2024
Ordinance at the Gates: the Evolving Landscape of AI Regulations Around the World			Q2 2024
Trust and Safety State of the Market 2024			Q3 2024
Under the Lens: The "Trust" of Transparency Reports			Q3 2024
Key Tech Away 2.0			Q4 2024

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