



# Everest Group Trust and Safety Services PEAK Matrix<sup>®</sup> Assessment 2025

Focus on Accenture

April 2025



# Introduction

The T&S industry experienced significant changes in last year, driven by a surge in egregious content volumes, especially during elections, the emergence of multiple regulations necessitating nuanced compliance strategies, and increased demand for T&S support as enterprises increased their adoption of gen AI. As a result, enterprise demand for specialized content moderation, data annotation and labeling, AI support services, and other value-added services increased.

In response to the changing enterprise demand, service providers focused on developing proprietary solutions, expanding their delivery networks by investing in talent-rich regions for localized operations, enhancing support for policy and other value-added services, and strengthening their investment in AI safety measures. They are developing partnerships with technology providers to provide technology solutions across the T&S value chain. They are also looking at strategic investments to help provide a continuous pipeline of domain experts that can be called upon at short notice for short-term specialized projects to address continuously changing AI requirements.

The current T&S service provider landscape is a wide spectrum of providers – IT/BPO, CXM providers, and niche/specialist providers – each bringing their expertise to address enterprise T&S concerns.

In the research, we present an assessment and detailed profiles of 28 T&S providers featured on the [Trust and Safety Services PEAK Matrix® Assessment 2025](#). 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 2024, 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 28 leading T&S providers featured on the Trust and Safety Services PEAK Matrix:**

- **Leaders:** Accenture, Concentrix, Genpact, TaskUs, TP, and Wipro
- **Major Contenders:** Alorica, Cognizant, Conectys, Foundever, Gear Inc, GlobalLogic, ModSquad, Sutherland, TDCX, Tech Mahindra, TELUS Digital, transcosmos, TTEC, Vaco, and WebPurify, an IntouchCX company
- **Aspirants:** Arcgate, Cogito Tech, Covalen, Foiwe, Helpware, ICUC Social, and PartnerHero

## Scope of this report

**Geography:** global

**Industry:** 28 trust and safety providers

**Services:** trust and safety services

# Trust and Safety services PEAK Matrix® characteristics

## Leaders

Accenture, Concentrix, Genpact, TaskUs, TP, and Wipro

- Leaders are focused on becoming strategic enablers by proactively serving the evolving needs of clients through policy support and advisory, quality assurance, audits, and regulatory reporting
- They are investing in client-facing technology solutions and innovations to enhance the efficiency of internal operations. They have also invested in an ecosystem of partnerships with technology providers to deliver solutions across the T&S value chain
- Leaders are at the forefront of enterprise adoption of gen AI by providing end-to-end support, including model deployment, operations, monitoring, governance, and prioritizing AI safety practices to ensure safe and ethical implementation of gen AI post-deployment. Additionally, they leverage tools and platforms to enhance their AI support services offering
- They also leverage their large-scale delivery presence across onshore, nearshore, and offshore locations. They offer new age T&S services such as risk and threat intelligence. They also invest in specialized talent, including domain-specific, industry-specific, and linguistic experts to train and refine AI models

## Major Contenders

Alorica, Cognizant, Conectys, Foundever, Gear Inc, GlobalLogic, ModSquad, Sutherland, TDCX, Tech Mahindra, TELUS Digital, transcocosmos, TTEC, Vaco, and WebPurify, an IntouchCX company

- While some of the Major Contenders have invested/partnered in/for offering T&S AI technology offerings for their clients, other contenders offer workforce management tools. They also deploy gen AI solutions to improve internal efficiencies but have limited adoption compared to Leaders
- Some Major Contenders are focusing on offering annotation, including basic annotation, multimodal annotation, specialized tasks, and domain-specific annotation AI. They also offer AI safety services to enterprises adopting gen AI
- Some Major Contenders have emerged as strong regional providers and are increasing the scope of their services
- Some of these providers continue to focus on the well-being of their workforce and are using technology to proactively monitor the well-being of their moderators

## Aspirants

Arcgate, Cogito Tech, Covalen, Foiwe, Helpware, ICUC Social, and PartnerHero

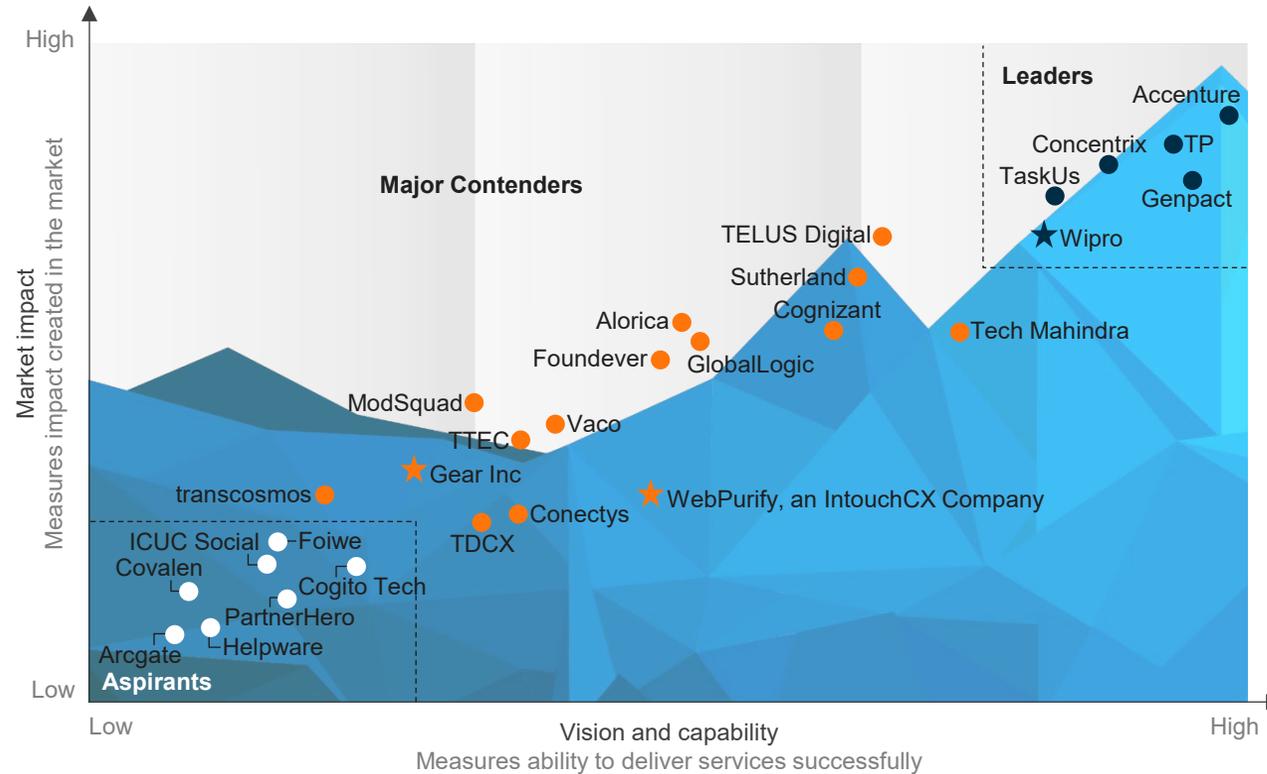
- Aspirants have focused on scaling their trust and safety services. While they continue to invest in technology capabilities, their current set of capabilities and limited scale may not be the best suited to handle end-to-end requirements for large organizations
- The Aspirants also have limited experience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

# Everest Group PEAK Matrix®

Trust and Safety Services PEAK Matrix® Assessment 2025 | Accenture is positioned as a Leader

## Everest Group Trust and Safety Services PEAK Matrix® Assessment 2025<sup>1,2,3,4</sup>

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



1 Assessments for Arcgate, Covalen, Foive, Helpware, ICUC Social, PartnerHero, TDCX, transcosmos, and TELUS Digital exclude provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with trust and safety buyers  
 2 Gear Inc was featured as Pure Moderation in Everest Group Trust and Safety Services PEAK Matrix® Assessment 2024  
 3 Analysis for IntouchCX is based on combined entity post-acquisition of WebPurify  
 4 Assessment for Accenture and Alorica are based on partial primary inputs  
 Source: Everest Group (2025)

# Accenture profile (page 1 of 8)

## Overview

### Company overview

Accenture is a global professional services company that supports businesses, governments, and organizations in building their digital core, improving operations, increasing revenue, and enhancing citizen services. With around 799,000 employees serving clients in over 120 countries, it is driven by talent and innovation. It combines its strengths in technology and leadership in cloud, data, and AI with industry experience, functional expertise, and global delivery capability. Its broad range of services span strategy and consulting, technology, operations, Industry X, and Song, supported by industry knowledge and global delivery capabilities. It also focuses on delivering 360-degree value to customers, employees, shareholders, partners, and communities while building long-term, trusted relationships.

**Headquarters:** Dublin, Ireland

**Website:** [www.accenture.com](http://www.accenture.com)

### Key leaders

- Andrew McGowan, Group Operating Officer, Accenture Operations
- Arundhati Chakraborty, Group Chief Executive, Accenture Operations
- Amiya Sinha, Offering Lead, Trust and Safety, Accenture Operations

● Not disclosed ● <500 FTEs ● 500-2,000 FTEs ● >2,000 FTEs

### Distribution of FTEs across processes

- AI support services
- Ad review and compliance
- Review and compliance
- Other services
- Platform safety

### Distribution of FTEs across languages

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

**Global T&S revenue<sup>1</sup>**  
In US\$ million

Not disclosed

**Global T&S FTEs<sup>1</sup>**  
Number of agents

Not disclosed

**Global T&S client base<sup>1</sup>**  
Number of clients

Not disclosed

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

# Accenture profile (page 2 of 8)

## Key investments and partnership ecosystem

### Recent T&S services-related developments/investments

Areas	Details
T&S-specific technology capabilities	<ul style="list-style-type: none"> <li>• SynOps for Trust &amp; Safety: powered by generative AI, a primary investment area especially with agent augmentation tools such as training assist and policy assist</li> <li>• Governance, reporting, and workflow: quality assurance, wellness, insights, and governance</li> <li>• Collaborations: partnered to develop and launch foundation models and generative AI applications; scaled AI adoption with its Refinery™ leveraging NVIDIA AI stack</li> <li>• Emerging content types: tools to detect and review AI-generated content</li> <li>• Responsible AI platform: platform that facilitates the ethical development, deployment, and governance of AI systems by integrating fairness, transparency, accountability, and compliance into every stage of the AI life cycle</li> </ul>
Other developments/investments	<ul style="list-style-type: none"> <li>• Location strategy: Its optimized work across global delivery center network, spanning 50+ centers in 33 countries, to enhance operating efficiency, expand AI usage, improve connectivity, and provide language support and cultural understanding. This includes moving work away from the United States and increasing operations in Central America, Thailand, and the Philippines</li> <li>• Risk and governance: Its T&amp;S operating principles define a governance and risk framework that leverages data-driven decision-making throughout the project life cycle to monitor EX, optimize client outcomes, and track industry changes to fuel further innovation. It established clear guidelines and a structured escalation path to integrate cross-functional expertise in key areas such as employee wellness, location strategy, and service offerings, ensuring efficient and responsible operations while strengthening client trust</li> <li>• Invested in emerging T&amp;S services including prompt engineering, red teaming, fine-tuning, and AI Generated Content (AIGC) review to enable clients achieve AI neutrality, security, and accuracy</li> <li>• Appointed its first Chief Responsible AI Officer and expanding its capabilities, solutions, platforms, ecosystem partnerships and thought leadership</li> <li>• Introduced managed services that monitor AI solutions, systems, and controls to help companies comply with fast-changing regulations</li> <li>• Invested in capabilities in generative AI testing, red teaming, ongoing compliance, security, and scaling these with its ecosystem partners</li> <li>• Extended research partnerships with Stanford, MIT and the World Economic Forum to expand the company's role as a leading voice on responsible AI standards and governance</li> </ul>

## Accenture profile (page 3 of 8)

### Key investments and partnership ecosystem

#### Key partnerships (representative list)

Partner	Area of Partnership
Amazon, Microsoft, Google, Nvidia, and IBM	Generative AI and Responsible AI
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
ActiveFence and Cyacomb	Content review and validation

#### Recent T&S wellness developments/investments

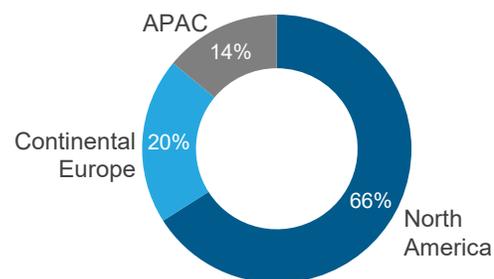
- Leveraged weCare Tech to understand evolving wellness needs for the workforce, particularly in emerging trust and safety areas such as red teaming and AI-generated content review
- Maintained partnerships with external agencies to enhance the resilience journey for practitioners, collaborating with organizations such as Calm, BetterUp, and Thrive Global
- Provided visibility and status of the critical elements of the weCare program globally through the weCare dashboard

# Accenture profile (page 4 of 8)

## Client portfolio

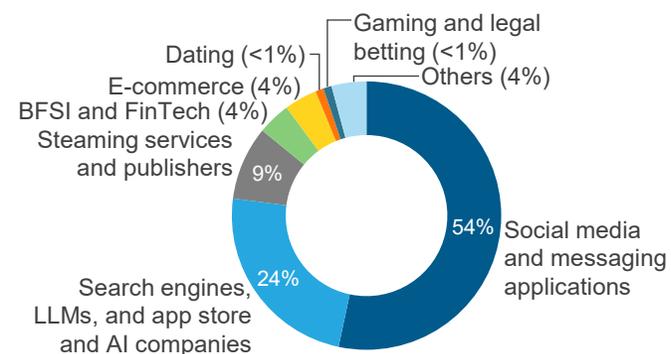
**Revenue mix by geography**

Revenue in US\$ million



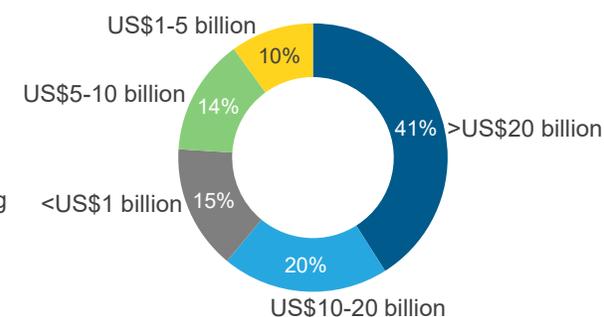
**Revenue mix by industry**

Revenue in US\$ million



**Number of clients by buyer size**

Number of active clients



**Revenue mix by process**

Revenue in US\$ million

Not disclosed

### Key trust and safety engagements

Client name	Work type	Region	Client since
A social media platform	AI support services, review and compliance, ad review and compliance, and platform safety	Global	Not disclosed
A generative AI application company	Review and compliance and AI support services	Global	Not disclosed
A food and beverage company	Review and compliance	Global	Not disclosed
A dating platform company	Review and compliance	Global	Not disclosed
An AI platform company	AI support services	Global	Not disclosed
A video streaming company	Review and compliance	Global	Not disclosed

## Accenture profile (page 5 of 8)

### Technology solutions offered to clients and used for internal operations improvement (including generative AI tools)

Areas	Year launched	Details	No. of BPS clients
AIGC detector	N/A	It includes tools to detect AI-generated content (text, image, audio, or video).	1
Workbench for AI Compliance and Governance	N/A	It is a platform that facilitates the ethical development, deployment, and governance of AI systems by integrating fairness, transparency, accountability, and compliance into every stage of the AI life cycle.	1
Human Moderation Platform	N/A	It is a single UI platform with plug-and-play, generative AI-based services for content review including content pre-screening, review, audits, and insight generation.	1
Content Prescreening and Classification	N/A	It includes AI-powered suite of tools for pre-screening and auto-classifying content, improving moderation efficiency. It includes generative AI for real-time video transcription and translation, enabling faster and more accurate detection of policy violations in multilingual content.	1
Trend Spotter	N/A	It tracks global events, news items, and trending topics to help teams pre-empt violations on the platform and enhance readiness to mitigate anticipated risks.	1
weCare Tech	N/A	It includes weCare Coaching Tool (a web-based well-being management platform for scheduling and managing well-being activities) and Wellbeing Analytics (a dashboard tool that provides actionable insights to enhance wellness programs).	1
Standard Quality Framework (SQF)	N/A	It is a quality management suite for T&S teams, enabling audits, knowledge assessments, policy management, and advanced analytics.	1
Intelligent Workforce	N/A	It offers a workforce and performance management tool with advanced tracking, team effectiveness management, and resource forecasting.	1
Translation and transcription tools	N/A	It includes a suite of multiple language translation, transcription, and localization tools that help agents overcome language barriers (including Translation Assist, Real Time Voice Translator, and Video Transcription and Translation Tool).	N/A
Document extraction tool	N/A	It is an end-to-end entity extraction solution designed to identify, interpret, and extract relevant information from a wide variety of document formats.	N/A
Self-paced learning	N/A	It is a platform that enables agents with self-paced learning and expedites their time to proficiency.	N/A
Generative AI-powered agent assist tools	N/A	It includes Policy Q&A (generative AI-powered chatbot to ask questions related to policies), content summarizer tools (including Policy Summarizer, News Summarizer, Video Summarizer, and Call Summarizer), and Intelligent product catalog generation tool (generative AI-powered solution to compose different elements like such as emails or catalog description based on product image).	N/A

## Accenture profile (page 6 of 8)

### Services offered to enterprises to enable generative AI adoption

Service	Use cases/T&S applications	No. of BPS clients
Gen AI Strategy	It establishes the foundational elements required for clients to build and scale their generative AI capabilities, with a focus on governance, value realization, and technical enablement. Through its AICG platform, it integrates ethical considerations – such as fairness, transparency, accountability, and compliance – across the entire AI lifecycle to ensure responsible development and deployment of AI systems, helping to mitigate reputational risks.	Not disclosed
Red teaming	Its red teaming solution is used to proactively test AI products, identify potential risks, and deliver rapid interventions to address issues such as bias and misinformation.	Not disclosed
Foundation Model Services	It customizes foundation models to align with the specific needs of a client's industry and enterprise, providing the necessary data, architecture, and platform services to accelerate experimentation and large-scale deployment. It collaborates with clients to develop industry-specific Generative AI models and applications, transforming how organizations access and utilize data. This includes fine-tuning large language models (LLMs), evaluating model outputs, and optimizing performance across key metrics such as accuracy, relevance, and consistency.	Not disclosed
Industry, Function & Application-Specific Gen AI	Accenture defines, builds, and deploys custom Generative AI solutions tailored to specific industries and functions by leveraging solutions from ecosystem partners, complemented by its services. These offerings address diverse business needs, such as enhancing customer support through LLM-powered agent assist tools, enabling real-time and accurate multilingual communication with language and content translation services, and improving enterprise knowledge management through semantic search, intelligent retrieval, analysis, and summarization of organizational knowledge.	Not disclosed

# Accenture profile (page 7 of 8)

Key delivery location



# Accenture profile (page 8 of 8)

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 end-to-end services across the T&S value chain, serving clients in social media and messaging apps, BFSI and FinTech, e-commerce, search engines, LLMs, and app store, and streaming services and publishing industries
- Accenture provides end-to-end AI safety support, from data annotation and labeling to AI model development and ongoing maintenance. It has diversified its AI support clientele by expanding its focus on digital non-native clients, helping them establish guardrails for their customer-facing LLM applications
- Accenture has collaborated with AWS to develop a Responsible AI Platform to offer holistic T&S support to enterprises to establish and implement policies, principles, and standards for ethical development, deployment, and governance of AI systems
- It has developed a proprietary tool for the detection and moderation of AIGC. It also leverages multiple n-house gen AI-based agent assist tools to improve moderator performance
- Accenture has expanded its delivery footprint to Italy, Germany, Egypt, Brazil, and Australia, enabling clients to benefit from both localized delivery and offshore cost advantages

### Limitations

- Accenture has a limited focus on clients in the travel and hospitality and gaming and legal betting industries
- While buyers have highlighted Accenture's strengths in proactiveness, domain expertise, and relationship management, they expect Accenture to improve its pricing competitiveness
- Buyers also expect Accenture to focus on ensuring stronger alignment with enterprise priorities for operational improvement while also providing increased policy support

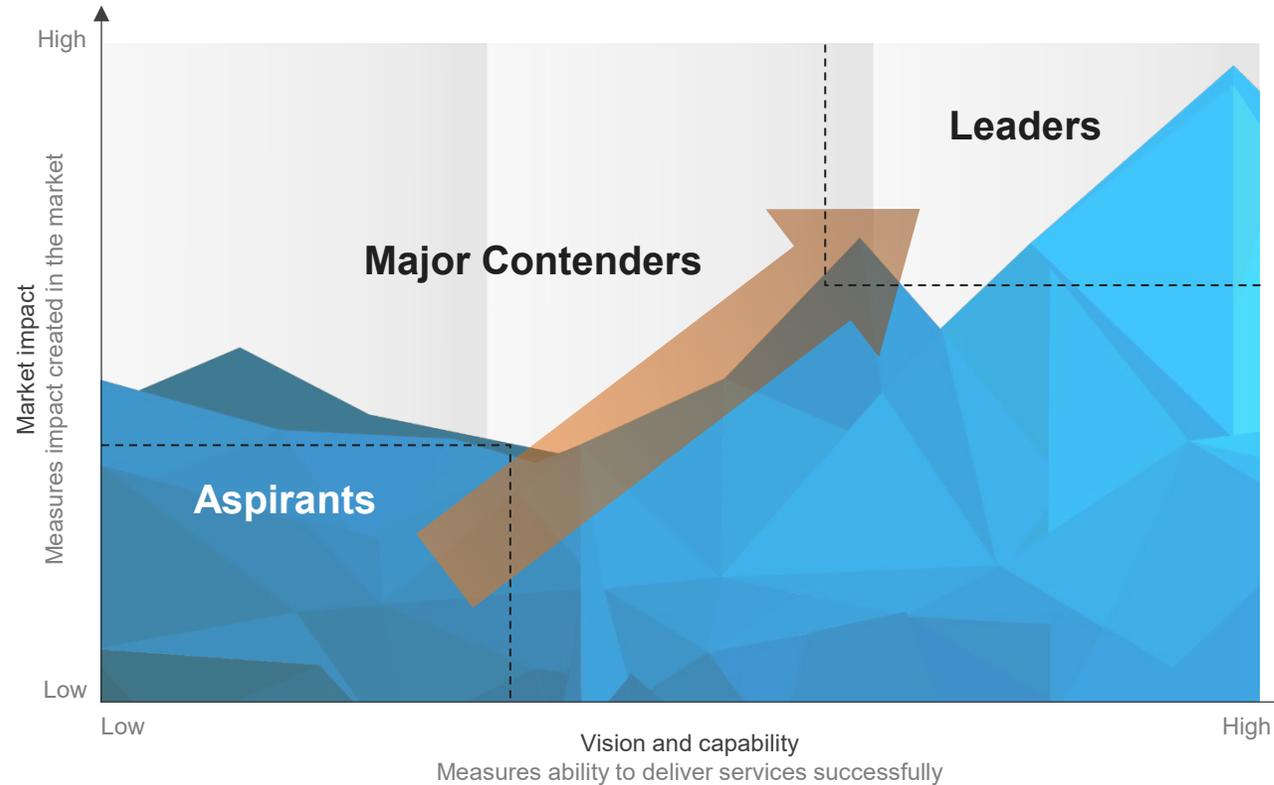
# Appendix

PEAK Matrix® framework

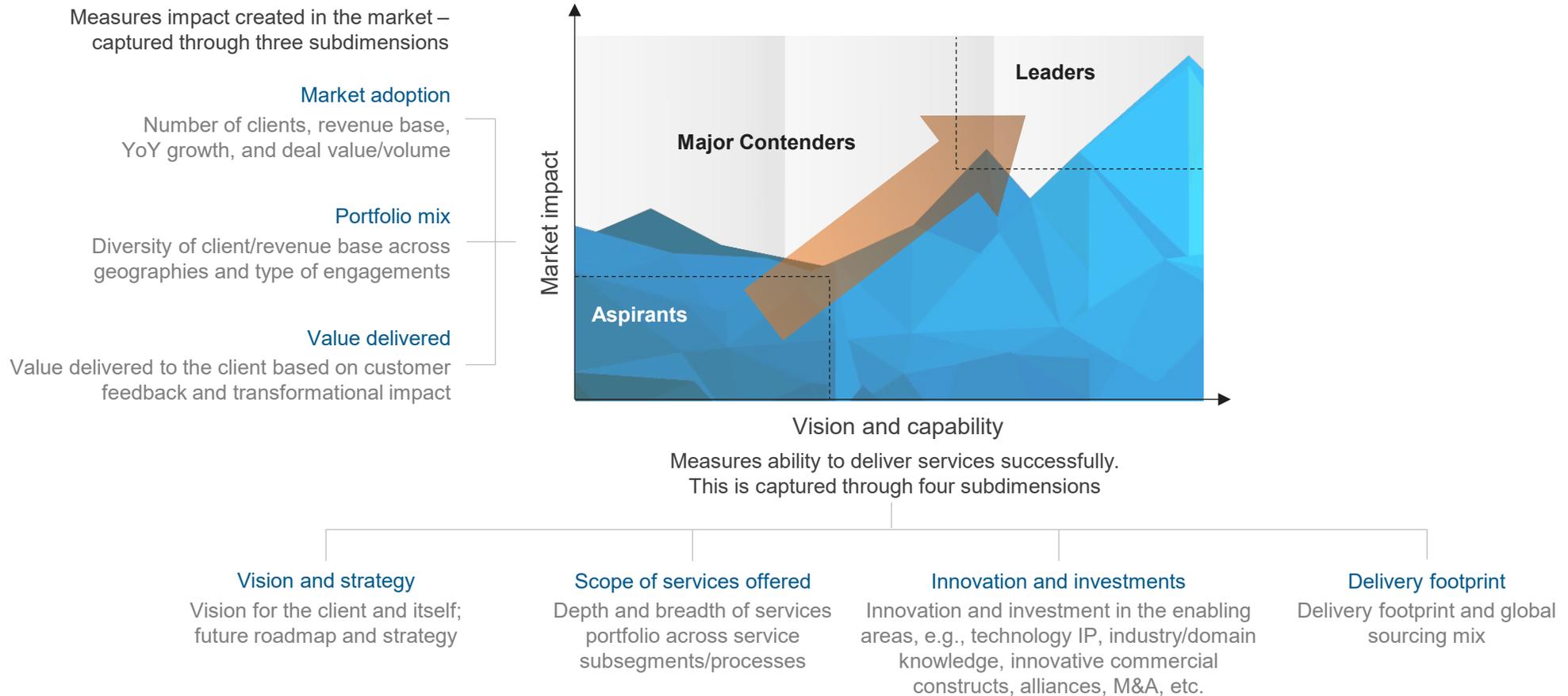
FAQs

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

Everest Group PEAK Matrix



# Services PEAK Matrix® evaluation dimensions



## 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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