



Everest Group PEAK Matrix® for Trust and Safety – Content Moderation Provider 2022

Focus on Teleperformance

April 2022



Introduction

The scope and applications of trust and safety services are no longer parochial to the social media industry and are increasingly finding use cases across multiple industries such as gaming, and retail and distribution. As more and more enterprises discover the vital need to ensure trust and safety of the users on their platforms, service providers across multiple categories – IT/BPO, Contact Centre Outsourcing (CCO) providers, and niche/specialist providers – are gearing up to serve the diverse needs of the market. With an increasing user base as a result of the proliferation of the internet across the globe as well as enhanced regulatory and media scrutiny, the importance of accurate trust and safety services would continue to grow.

Service providers are also focusing on offering differentiated services to their buyers. Recently, the trust and safety market has seen service providers increasingly embracing the gig/flexi-workforce model, which not only ensures scalability but also caters to the vital need for the localized knowledge of socio-political and cultural nuances – qualities that are important for moderation related decision making. Given its challenges, gig workforce is currently limited to only certain work types, but it would be interesting to see its evolution and adoption in the coming years. Similarly, service providers are also emerging as strategic partners to their buyers by offering services related to the critical element of policy management.

This research aims to assess the capabilities, offerings, and resulting impact created by the service providers in the trust and safety market, and position them on Everest Group’s trust and safety – content moderation PEAK Matrix®.

In this research, we focus on:

- Trust and safety – content moderation services PEAK Matrix 2022 including service provider capability
- Service provider landscape
- Remarks on key strengths and limitations for each service provider

Scope of this report



Geography
Global



Service providers
This research covers the following 18 trust and safety – content moderation service providers: Accenture, Alorica, Appen, Besedo, Concentrix, Conectys, Genpact, GlobalLogic, Majorel, HGS, Sutherland Global, TaskUs, Tech Mahindra, Teleperformance, TELUS International, TTEC, Webhelp, and Wipro



Services
Trust and safety – content moderation services

Key characteristics of Leaders, Major Contenders, and Aspirants

Leaders:

Accenture, Concentrix, Genpact, Majorel, and Teleperformance

- Leaders continue to invest in strengthening their all-round trust and safety capabilities, and most leaders are endeavoring towards creating differentiated capabilities by exploring newer avenues of value creation for their trust and safety clientele
- They leverage deep industry and domain expertise, superior technology capabilities, and robust frameworks for moderator well-being monitoring and management. Most leaders have invested in research in the field of moderator well-being, and some of them have end-to-end consulting and transformation capabilities
- Leaders 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 to meet content needs
- They also leverage their scale of operation and delivery presence across onshore, nearshore, and offshore locations to cater to varied strategic requirements of clients. They have strong capabilities to moderate content in a variety of languages

Major Contenders:

Alorica, Appen, Conectys, GlobalLogic, Sutherland Global, TaskUs, Tech Mahindra, TELUS International, Webhelp, and Wipro

- Most major contenders continue to focus on the well-being 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, the others offer workforce management tools
- Most major contenders have invested in developing systems and processes to leverage the gig workforce. This is aimed toward offering scalability and increased localization of services to their trust and safety clientele

Aspirants:

Besedo, HGS, and TTEC

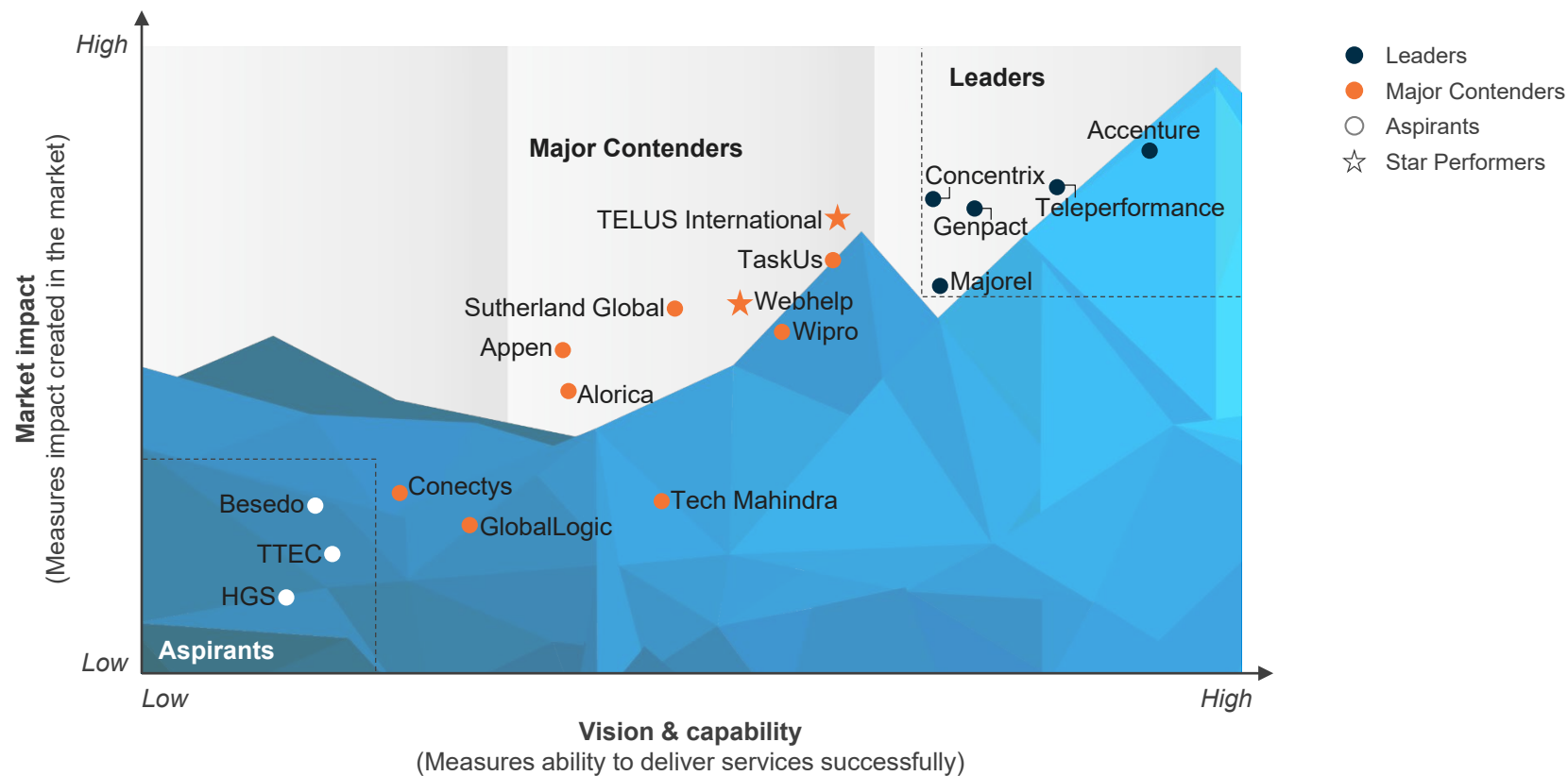
- Aspirants have focused on expanding upon their existing trust and safety scope of services. While they continue to invest in technology capabilities, their current set of capabilities and limited scale may not be the best suited to handle end-to-end requirements for large organizations. The aspirants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

Everest Group PEAK Matrix®

Trust and Safety – Content Moderation Services PEAK Matrix® Assessment 2022 | Teleperformance positioned as Leader



Everest Group Trust and Safety – Content Moderation Services PEAK Matrix® Assessment 2022^{1,2}



1 Assessments for Appen and HGS excludes service 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 – content moderation buyers.

2 There have been changes in the assessment methodology and weightages of parameters in the current i.e., 2021 assessment, compared to the 2020 assessment.

Source: Everest Group (2022)

Teleperformance | trust and safety – content moderation services profile (page 1 of 5)

Overview

Company profile:

Teleperformance is a global group in digitally integrated business services that offers a one office support services model combining three wide, high-value solution families: customer experience management, back-office services, and business process knowledge services. The group’s 420,000+ employees, based in 88 countries, support billions of connections every year in over 265 languages and over 170 markets.

Headquarters: Paris, France

Website: www.teleperformance.com

Key leaders

- Daniel Julien, Chairman of the Board and Chief Executive Officer
- Agustin Grisanti, Chief Operating Officer
- Bhupender Singh, President of Transformation
- Leigh P. Ryan, Chief Legal and Compliance Officer
- Eric Dupuy, Chief Global Business Development Officer
- Miranda Collard, Chief Global Client Officer
- Akash Pugalia, Global President - Trust & Safety
- Scott Klein, President of Specialized Services

Trust and safety – content moderation services	2019 ^{1,2}	2020 ^{1,2}	2021 ^{1,2}
Revenue (US\$ million)	225-250	250-275	375-425
Number of FTEs	7,000-8,000	8,000-9,000	12,000-13,000
Number of clients	20-25	30-40	50-60

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

2 Everest Group estimates.

Recent marketing services-related developments/investments

Areas	Developments/investments
Technology capabilities	<ul style="list-style-type: none">• 2021: invested in AI solutions to expand proactive detection and prevention solutions• 2021: partnered for AI-powered identity verification/authentication• continues expansion of integrated solutions and digital offerings via organic growth and strategic acquisitions
People	<ul style="list-style-type: none">• 2021: launched people-centered wellness / well-being framework and programs, advanced wellness tools• 2021: launched Trust & Safety Training Academy – it provides specialized domain training and career-architecture program which trains and develops individuals into trust and safety experts who can deal with this dynamic domain while managing the risks
Process	2021: deepened T&S offerings by mapping the entire value supply chain for e-commerce and retail and provided a tailored set of solutions specific for each part of the value supply chain across multiple industries and clients
Others	<ul style="list-style-type: none">• 2021: glocalized quality framework with 3-fold objectives powered with the right processes to improve accuracy, platform experience, and accelerate learning speed• 2021: developed partnerships to create in-depth research and training and professional development opportunities for T&S members• Ongoing: has made significant investments in cybersecurity, privacy, and compliance, including WFH PCI-DSS / GDPR / BCRS / ISO 27001 / ISO 27701 / HITRUST / HIPAA

Teleperformance | trust and safety – content moderation services profile (page 2 of 5)

Key delivery locations



Teleperformance | trust and safety – content moderation services profile (page 3 of 5)

Technology solutions/tools

Technology name	Since	Description	clients
Scam Check Automation (RPA Tool)	2021	It automatically searches for fraudulent listings in the specific filter property address, images (digital media) and automatically matches the information across various websites.	1
HPI ID Database	2021	It is a TP application that serves as a secure repository of all types of valid IDs across the globe issued by various governments, agencies, and departments.	1
Global T&S Analytics	2021	Encompasses all global operational, SLA, and KPI data in one place, for real-time updates on data and metrics for better inference on process health and quicker decision-making.	1
Performance Scorecard Dash	2021	It is a scorecard dashboard that aims to digitize the percolation of KPI performance data to all agents.	1
Intelligent Moderator Allocation Tool (IMAT)	2021	The solution intelligently allocates best-fit moderators to the queues based on work requirements.	1
AI Ops Platform Solutioning & Intelligent Automation	2021	An API solution platform that offers an extensive portfolio of modular, best-in-class models and APIs, which empowers current TP T&S's AI Ops solutions for a variety of use cases across clients and industries.	N/A
APT Dashboard	2021	The Average Pending Time (APT) Dashboard provides visibility to every stakeholder on the operation over the APT targets.	1
TP Gamification	2021	Application of game design techniques and principles for learning or engagement for meeting business goals. This helps operations drive desired user behavior to meet business targets. It is fast emerging as an effective technique to motivate employees and drive engagement for meeting business goals.	29
Wellness App	2021	It is oriented to identify potential moderators' patterns that might affect their mental well-being and how Teleperformance can address actions to improve and enhance resilience.	4
Policy App	2021	It gives trust and safety and content moderation floor the opportunity to express their observations, ideas, grey areas, and questions about anything related to the policies they are implementing in moderating content.	4
Knowledge Management App	2021	A tool to manage the constant updates received from clients on various policies; proactively assess the understanding of change through knowledge checks, by eliminating the impact of change on performance and platform experience.	4

Teleperformance | trust and safety – content moderation services profile (page 4 of 5)










Technology solutions/tools

Technology name	Since	Description	clients
TP Alert	2021	It provides preventive alerts to the moderators before the time is out. The tool improves workforce management, floor monitoring, employee/moderator time management, reporting, etc.	2
Time Tree	2021	It is a powerful efficient task distribution management for optimum utilization of T&S tasks and activities.	1
TP Book	2021	A solution to centralize the information in various documents and articles and make the information available to moderators in just one space.	25
Top Policy Guide	2021	An innovative coaching tool that notifies the moderators of their individual ‘top policy’ categories.	2
Third Eye	2021	An in-house developed solution that automatically highlights sensitive or prohibited words.	1

Teleperformance | trust and safety – content moderation services profile (page 5 of 5)

Everest Group assessment – Leader

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
								

Strengths

- Teleperformance has experience in serving the trust and safety requirements of buyers from all regions of the world with a focus on serving European buyers. It also has a global delivery presence that enables it to serve its buyers from all regions of the world
- It has recently invested in workforce management through the development of the **Intelligent Moderator Allocation Tool** which uses automation to allocate moderators to queues, and aims to improve productivity and quality
- It has recently entered into a partnership to offer custom content moderation models and APIs to buyers who can leverage the same to build their own solutions. Through the partnership, Teleperformance aims to improve its offerings in the moderation technology, content annotation and labeling services space
- Teleperformance has recently invested in policy management and has developed tools aimed towards gathering policy-level insights from their moderators and managing policy updates
- It has extensive language capabilities and offers translation services in more than 240 languages and content moderation services in more than 50 languages

Limitations

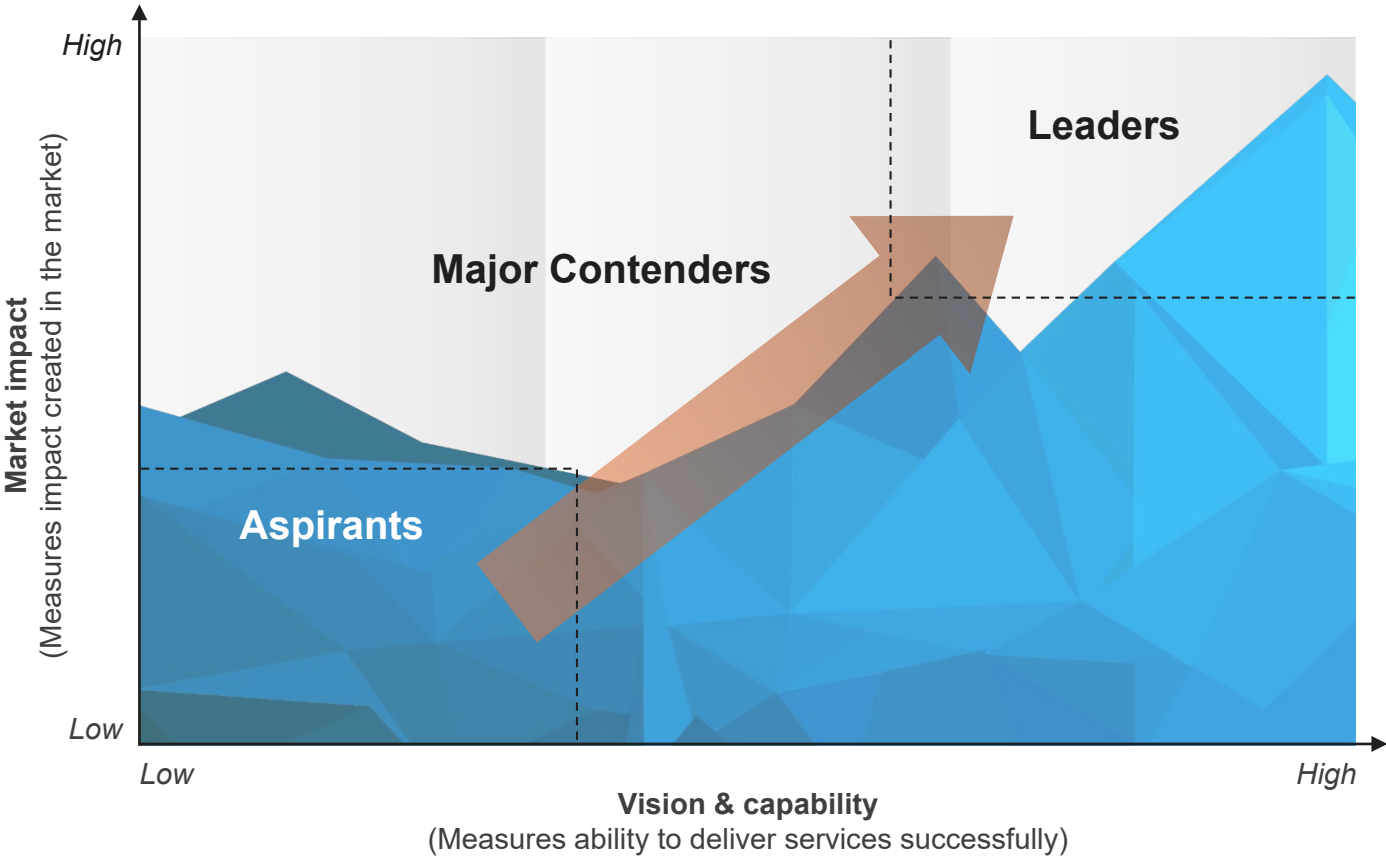
- While it has in-depth experience in offering translation services, its scalability in providing transcription and quality assurance services remain limited
- Referenced buyers expect Teleperformance to offer cost competitiveness compared to East Asia-based trust and safety service providers
- Referenced buyers have also called out the need for Teleperformance to leverage data in driving optimizations and improvements

Appendix

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

Measures impact created in the market – captured through three subdimensions

Market adoption

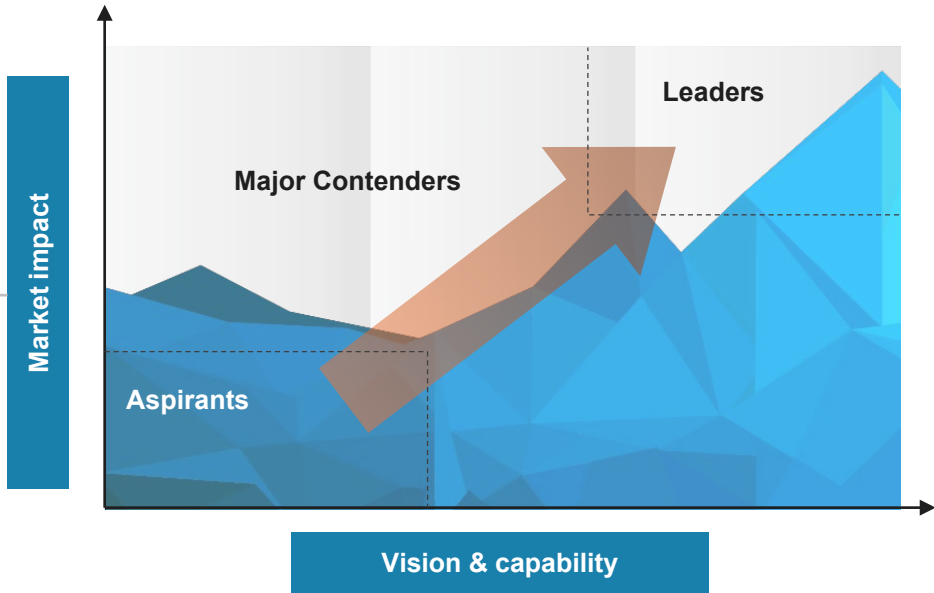
Number of clients, revenue base, YOY growth, and deal value/volume

Portfolio mix

Diversity of client/revenue base across geographies and type of engagements

Value delivered

Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy

Vision for the client and itself; future roadmap and strategy

Scope of services offered

Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments

Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint

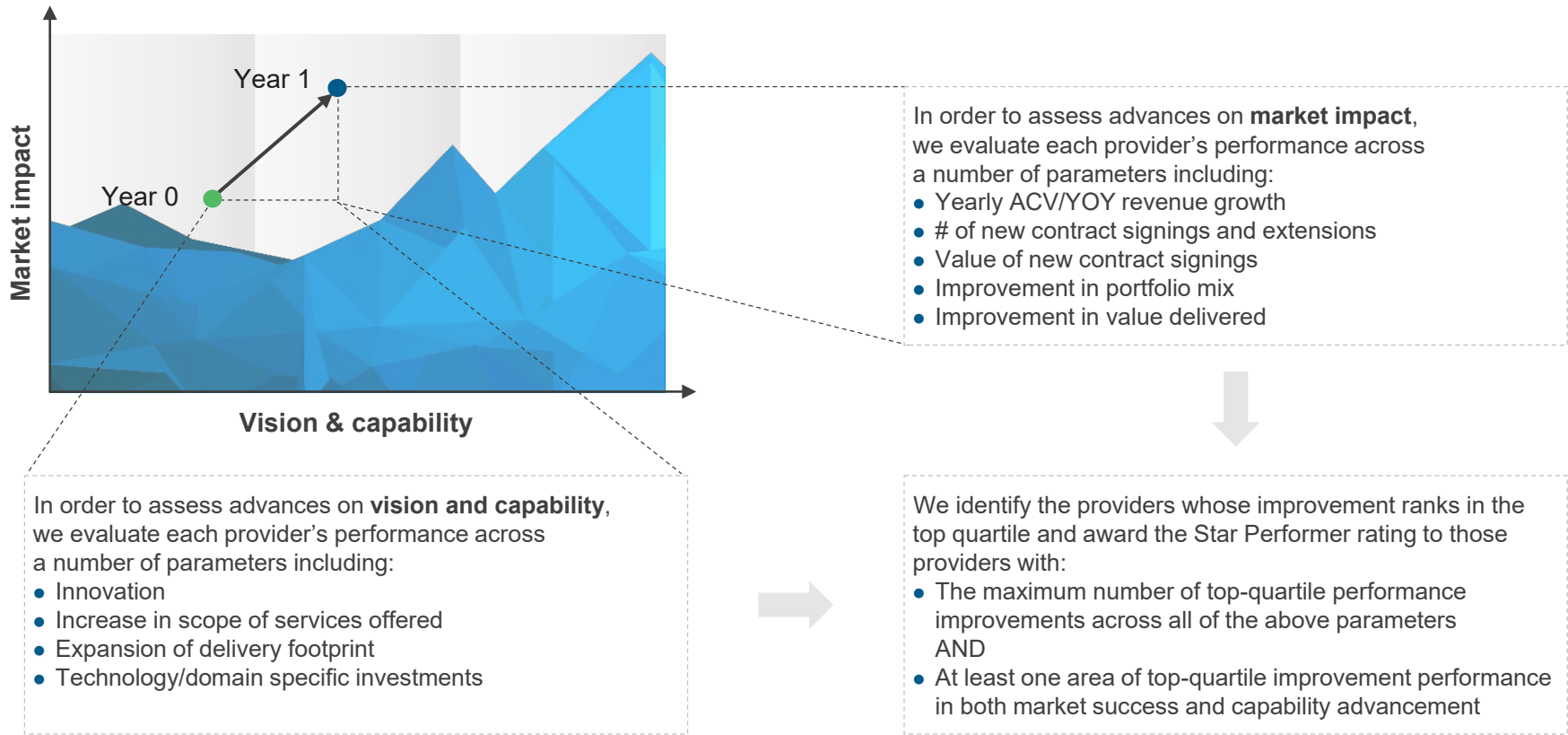
Delivery footprint and global sourcing mix



Everest Group confers the Star Performers 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 Performers title relates to YOY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

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

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

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

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

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix 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 the designated POC at Everest Group.

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

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. 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 as well as serve the future expectations of enterprises



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