Everest Group®

Everest Group Trust and Safety Services PEAK Matrix® Assessment 2024

Focus on **Sutherland**

April 2024

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MATRIX®

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, transcosmos, 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

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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

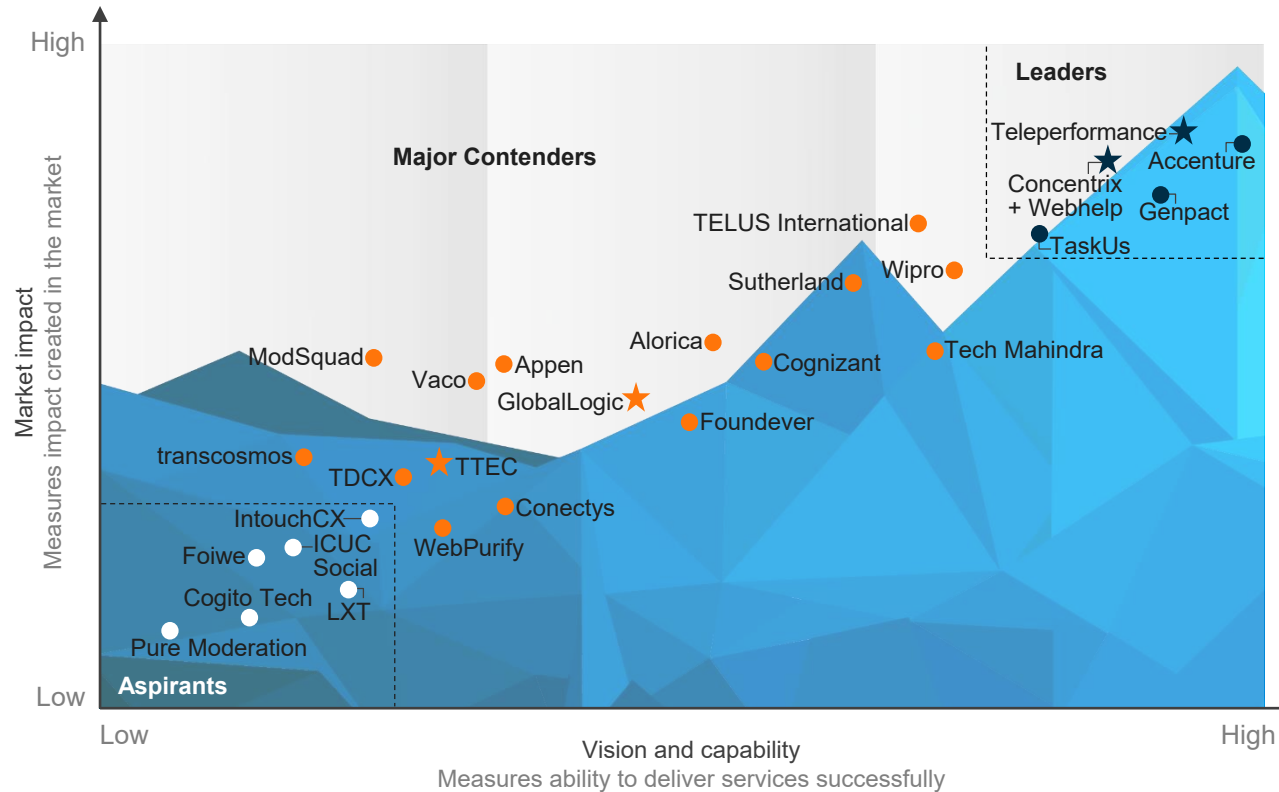Cogito Tech, Foiwe, ICUC Social, IntouchCX, LXT, and Pure Moderation

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 | Sutherland is positioned as a Major Contender

Everest Group Trust and Safety Services PEAK Matrix® Assessment 2024[1,2,3]

- ● Leaders
- ● Major Contenders
- ○ Aspirants
- ☆ Star Performers

Market impact
Measures impact created in the market

High

Leaders

Teleperformance ★
Concentrix
+ Webhelp ★ Accenture
TaskUs Genpact

Major Contenders

TELUS International ●
Sutherland ● Wipro ●
Alorica ● Cognizant ● Tech Mahindra ●
ModSquad ●
Vaco ● Appen ●
GlobalLogic ☆
Foundever ●
transcosmos ●
TDCX ● ★ TTEC
Conectys ●
IntouchCX ○
Foiwe ○ ICUC
Social ○
Cogito Tech ○
LXT ○
Pure Moderation ○
WebPurify ●

Aspirants

Low

Low — Vision and capability — High
Measures ability to deliver services successfully

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)

Sutherland profile (page 1 of 8)
Overview

Company overview

Sutherland integrates human interactions with AI technologies throughout customer and employee life cycles. It provides content and digital transformation services. It collaborates with clients to automate processes using a combination of proprietary and third-party solutions, with a focus on driving engagement through speech, sentiment analysis, and predictive analytics. It employs various AI technologies, including real-time translation and content toxicity monitoring, to enhance content monitors. Its approach extends to guardian (agent) wellness, utilizing proprietary technologies such as Wellness Indices and Sentinel for pre-emptive wellness, complemented by a wellness studio.

Headquarters: New York City, New York   **Website:** www.sutherlandglobal.com

Key leaders

- Dilip Vellodi, Chairman and Chief Executive Officer
- Jim Dwyer, Chief Transformation and Innovation Officer
- Sriram Panchapakesan, Chief Executive Officer – Telecommunications, Media, Technology and Europe
- Doug Gilbert, Chief Information Officer and Chief Digital Officer
- Andrew Worzella, SVP, Business Development
- Vikas Verma, Global Head of Content, Research, and Innovation

Distribution of FTEs across processes   ● <500 FTEs   ● 500-2,000 FTEs   ● >2,000 FTEs

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

Distribution of FTEs across languages   ● <500 FTEs   ● 500-1,000 FTEs   ● >1,000 FTEs

| ● English | ● French | ● German | ● Spanish |
| ● Portuguese | ● Arabic | ● Mandarin | ● Hindi |

List of the top five niche languages in which support is provided: Italian, Japanese, Russian, Urdu, and Portuguese

Global T&S revenue
In US$ million

Not disclosed

2021[1]   2022[1]   2023[1]

Global T&S FTEs
Number of agents

Not disclosed

2021[1]   2022[1]   2023[1]

Global T&S client base
Number of clients

Not disclosed

2021[1]   2022[1]   2023[1]

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

Sutherland profile (page 2 of 8)

Key investments and partnership ecosystem

Recent T&S services-related developments/investments

Areas	Developments/investments
T&S specific technology capabilities	• **2023**: developed Sutherland IDScan, an AI-enabled identity verification and validation platform • **2023**: developed Sutherland ToxScreen, an NLP-driven platform to detect and flag toxicity in online interactions • **2023**: developed a ChatGPT-based knowledge curation agent to research and curate product-specific content for troubleshooting guides • **2023**: invested in web extension of AI-based translation agent for non-English documents – assists agents with T&S processes
ESG initiatives	**ESG Research-as-a-Service:** Launched in 2022, it is a dedicated, specialized service helping global organizations with ESG data analysis and the creation of both customized qualitative and quantitative ESG reports **Accolades** • Won Silver Medal for two years in a row by Ecovadis • TUV Nord Certification for 12 facilities in India and 10 more locations added under this certifications scope in this FY • Awarded Corporate Plus status by National Minority Supplier Development Council (NMSDC)

Other developments/ investments	• Certified as **Great Places To Work** in India, Philippines, Bulgaria, Egypt, US, Canada, Colombia, and Mexico
	• Diversity inclusion initiatives for 2023 and 2022:
	  – Project ECHO and Project HORIZON: working with clients for hiring and inclusion of speech and hearing-impaired and visually impaired individuals, respectively
	  – Internal mentorship programs and initiatives for LGBTQIA+ inclusion

Recent T&S wellness developments/investments

- **2023:** partnered with a provider of research-based clinical wellness solutions, and specifically targeted toward T&S agents
- **2023:** developed wellness platform that allows agents to schedule consultation calls with clinical psychologists (across a global pool of empaneled clinical psychologists), and conduct consultation under strict confidentiality
- **2022:** leveraged Sentinel.AI to upgrade the intelligence algorithm that allows proactive monitoring of emotional state of guardians – enabling stress detection among moderators to drive pre-emptive wellness

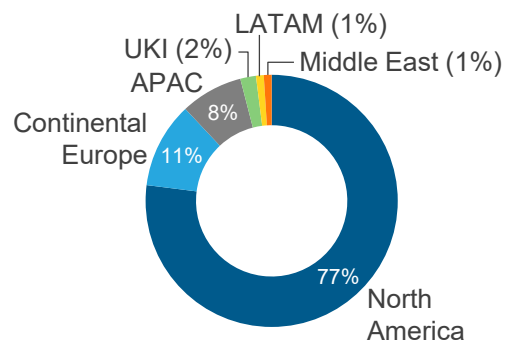### Key partnerships (representative list)

Name of Partner	Area of Partnership
Playvox	Performance Management platform (Sutherland Performance)
Modern Hire	Utilize AI-led fitment tests, e-psychometric tests, and job tryout modules to improve the hiring process
A trust and safety technology provider	Sutherland PROTECT: AI-assisted human moderation platform
A leading developer of learning solutions	eSBL – gamified, scenario-based training platform
A global leader in wellness solutions	Wellness and resiliency studio – portfolio of wellness solutions for its moderators

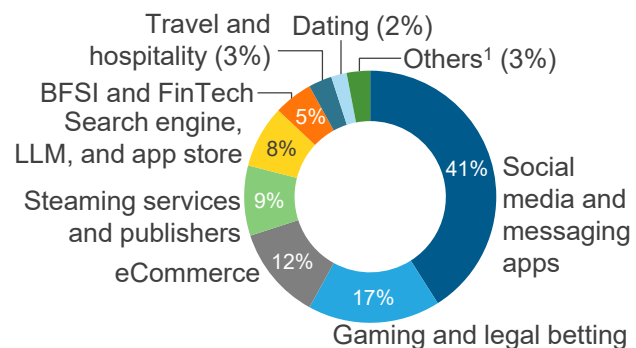# Sutherland profile (page 3 of 8)

Client portfolio

Trust and safety revenue mix by geography
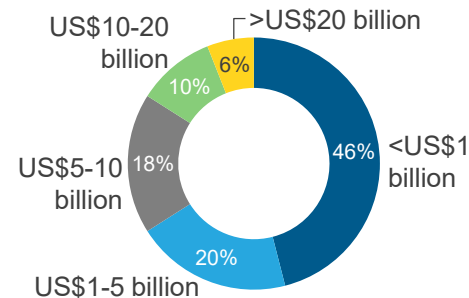Revenue in US$ million
100% = Not disclosed

- North America 77%
- Continental Europe 11%
- APAC 8%
- UKI (2%)
- LATAM (1%)
- Middle East (1%)

Trust and safety revenue mix by industry
Revenue in US$ million
100% = Not disclosed

- Social media and messaging apps 41%
- Gaming and legal betting 17%
- eCommerce 12%
- Steaming services and publishers 9%
- Search engine, LLM, and app store 8%
- BFSI and FinTech 5%
- Travel and hospitality (3%)
- Dating (2%)
- Others[1] (3%)

Trust and safety number of clients by buyer size
Number of active clients
100% = Not disclosed

- <US$1 billion 46%
- US$1-5 billion 20%
- US$5-10 billion 18%
- US$10-20 billion 10%
- >US$20 billion 6%

Trust and safety mix by process
Revenue in US$ million
100% = Not disclosed

- Review and compliance 36%
- Content curation, annotation, and data analysis 31%
- Platform safety 15%
- Content services 12%
- Ad review and compliance 7%
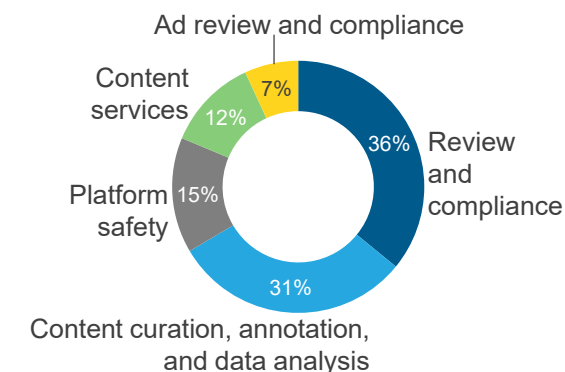
Key trust and safety engagements

Client name	Work type	Region	Client since
A leading review management platform	Review and compliance and platform safety	Europe/Global	Not disclosed
A leading online gaming platform	Review and compliance and platform safety	US	Not disclosed
A leading social media platform	Review and compliance, content services, platform safety, and ad review and compliance	US	Not disclosed
A leading online remittance service	Platform safety	US/Global	Not disclosed
A multinational financial services company	Ad review and compliance	US/Global	Not disclosed
A global leading job review platform	Review and compliance and platform safety	US/LATAM	Not disclosed
A leading provider of consumer financing options for merchants	Platform safety	US/Global	Not disclosed

1 Others include online communities, telecom, and infrastructure

Sutherland profile (page 4 of 8)

Technology solutions/tools other than generative AI

Solution name	Year launched	Description	No. of BPS clients
Sutherland IDScan	2023	It is an AI-enabled identity verification and validation platform.	Not disclosed
Sutherland ToxScreen	2023	It is an NLP-driven platform that can detect and flag toxicity in online interactions	Not disclosed
Translate.ai	2022	It is a cloud-based, cognitive, language translation solution that supports over 90 languages. It eliminates the hiring of dedicated and native language speakers for every language required by client programs; negates disruptions caused to Business Continuity Plan (BCP) and shrinkage and rules out dependency on backfill.	Not disclosed
Sentinel	2022	It is a remote work security, real-time monitoring solution. It was recently upgraded with emotional intelligence algorithm, which allows proactive monitoring of the emotional state of moderators – enabling stress detection among guardians to drive pre-emptive wellness.	Not disclosed
Wellness App	2022	It is an application that ensures employee well-being, covering mood tracking, diet consultation, emotional therapy, on-demand videos, lab tests scheduling, and online medicine-buying option.	Not disclosed
Sutherland Mindstream: Flexi-work Platform	2021	It allows to tap into gig workforce, enabling the existing 45,000 workforce to work on short-term projects and helps to connect with a vast network of experts and freelance workers with flexible jobs across T&S.	Not disclosed
Sutherland Thrive – Recruitment processes and Talent Management	2021	It is an integrated platform across the employee transformation journey with key modules such as smart sourcing (including psychometric and stress test), skills-based assessment and job tryout, self-service portal for query resolution, scenario-based and gamified training, and predictive staffing.	Not disclosed
Sutherland Performance	2021	It is created to implement performance management for team members through agent scorecard, team ranking, coaching, quality, learning, along with providing a knowledge base for document storage and reference.	Not disclosed
Sutherland PROTECT	2020	It is an integrated AI-assisted content moderation platform, with a focus on textual content, and the ability to automatically detect, flag content or comments, and queue it up for human moderation. It enhances user online safety and protects against online scams. Additionally, the AI engine can analyze content feeds, spot emerging trends in harmful, toxic, and/or misinformation narratives, and notify with early warning reports.	Not disclosed
Guardian Happiness Index	Not disclosed	Towards an employee-centric approach, Sutherland's Happiness Index, derived from employee well-being programs, is based on a scientific and psychologically designed analytical model, and pre-empts any signs of psychological issues, to enable proactive resolution.	Not disclosed

Sutherland profile (page 5 of 8)

Technology solutions/tools other than generative AI

Solution name	Year launched	Description	No. of BPS clients
Society Impact Index	Not disclosed	This index, built on the anatomy of a social post index, brings a sense of pride among the guardians, and motivates them to optimize performance.	Not disclosed
Guardian Resiliency Index	Not disclosed	This index measures the resiliency quotient of guardians while moderating egregious content. Corelated trainings help guardians improve their resiliency quotient.	Not disclosed

Sutherland profile (page 6 of 8)

Generative AI solutions/tools

Solution name	Description	No. of BPS clients
Smart Leap HelpTree	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.	Not disclosed
ChatGPT-based research and curation agent	It uses ChatGPT to research and curate product-specific content for troubleshooting guides leading to reduction in time for content curation, with only contextual framing (where applicable) left with agent.	Not disclosed

Sutherland profile (page 7 of 8)

Key locations

Sutherland profile (page 8 of 8)

Everest Group assessment – Major Contender

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

- Sutherland offers multiple trust and safety services with a focus on review and compliance, platform safety, and content curation, annotation, and data analysis services for clients in the BFSI and FinTech, social media and messaging apps, gaming and legal betting, streaming services and publishing, and e-commerce industries

- Its proprietary solution, Sutherland IDScan, offers an AI-enabled platform to validate the identities of individuals from documents, facial matching, and validation of data

- It has developed an NLP-based gaming solution, Sutherland ToxScreen, which enables analysis of user interaction on live streaming, detection of toxicity, and flagging of user comments

- It has recently launched a Wellness Resiliency Studio that offers researched wellness solutions. It continues to leverage its Sentinel platform to proactively monitor the emotional wellbeing of its moderators

Limitations

- Sutherland focuses on small and midsize clients to drive growth; however, its ability to successfully serve large clients is limited

- Its delivery portfolio is skewed toward offshore locations. Its concentrated delivery base can prove to be a deterrent for European clients looking for onshore delivery due to the increasing regulatory mandate and localization requirements

- It lags its peers in offering generative AI-based trust and safety solutions to its clients. Additionally, its current use of generative AI for internal operations is also limited to translation and agent research assist

- Buyers expect Sutherland to offer innovative solutions and develop a proactive approach while serving their needs
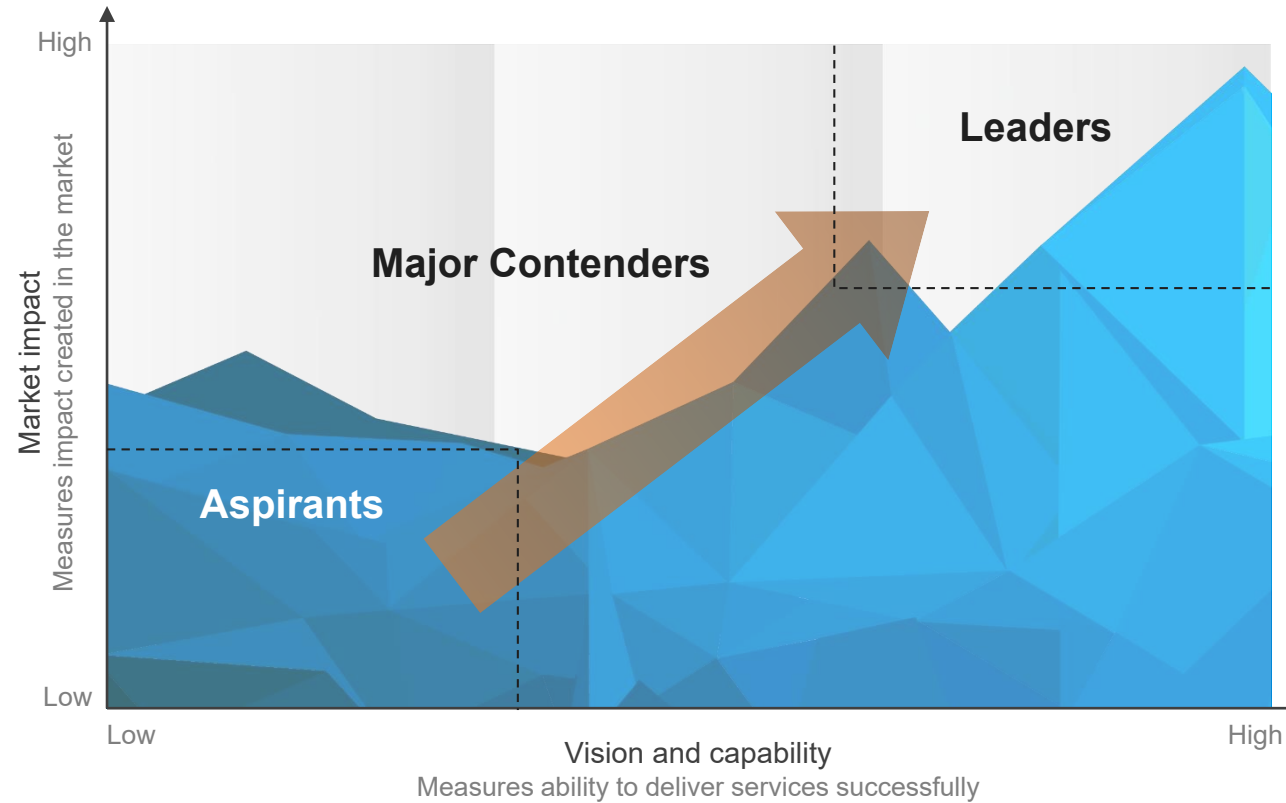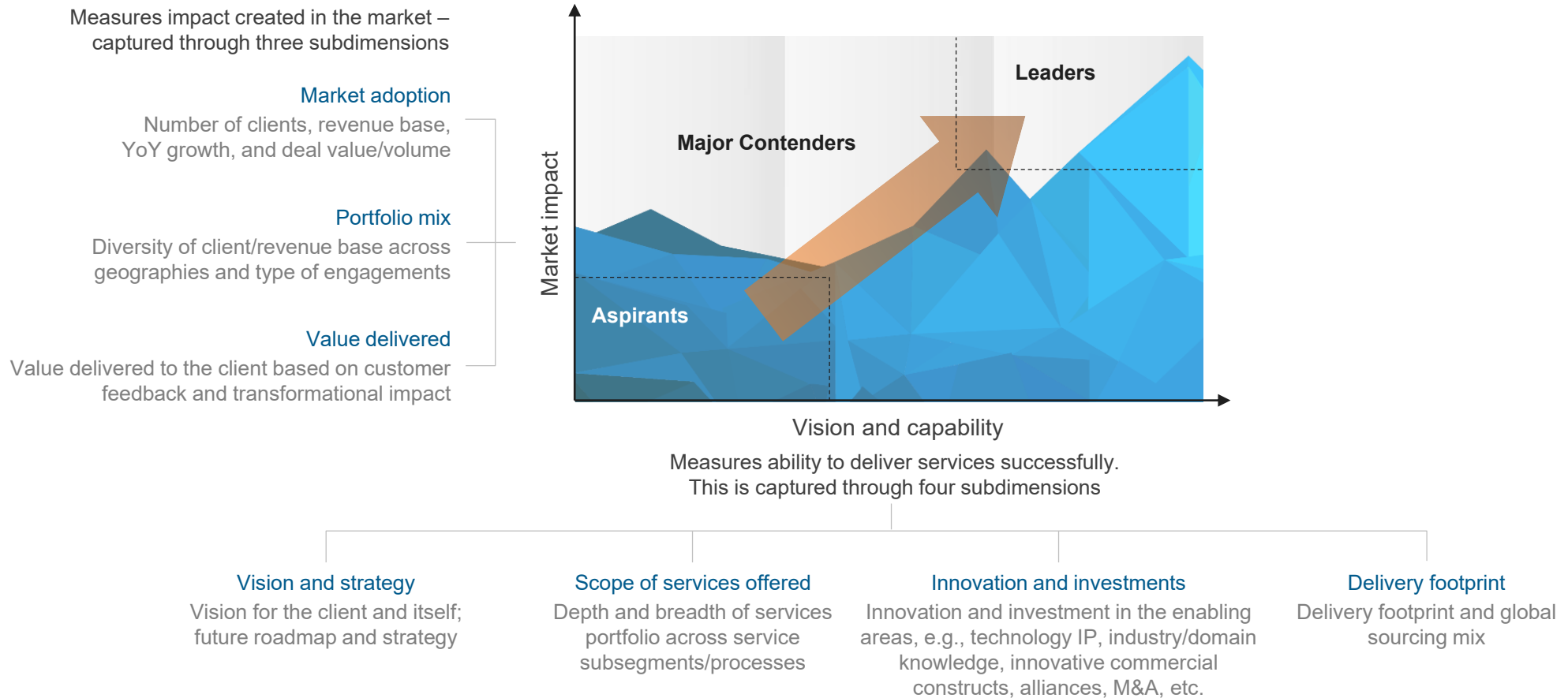
Appendix

PEAK Matrix framework

FAQs

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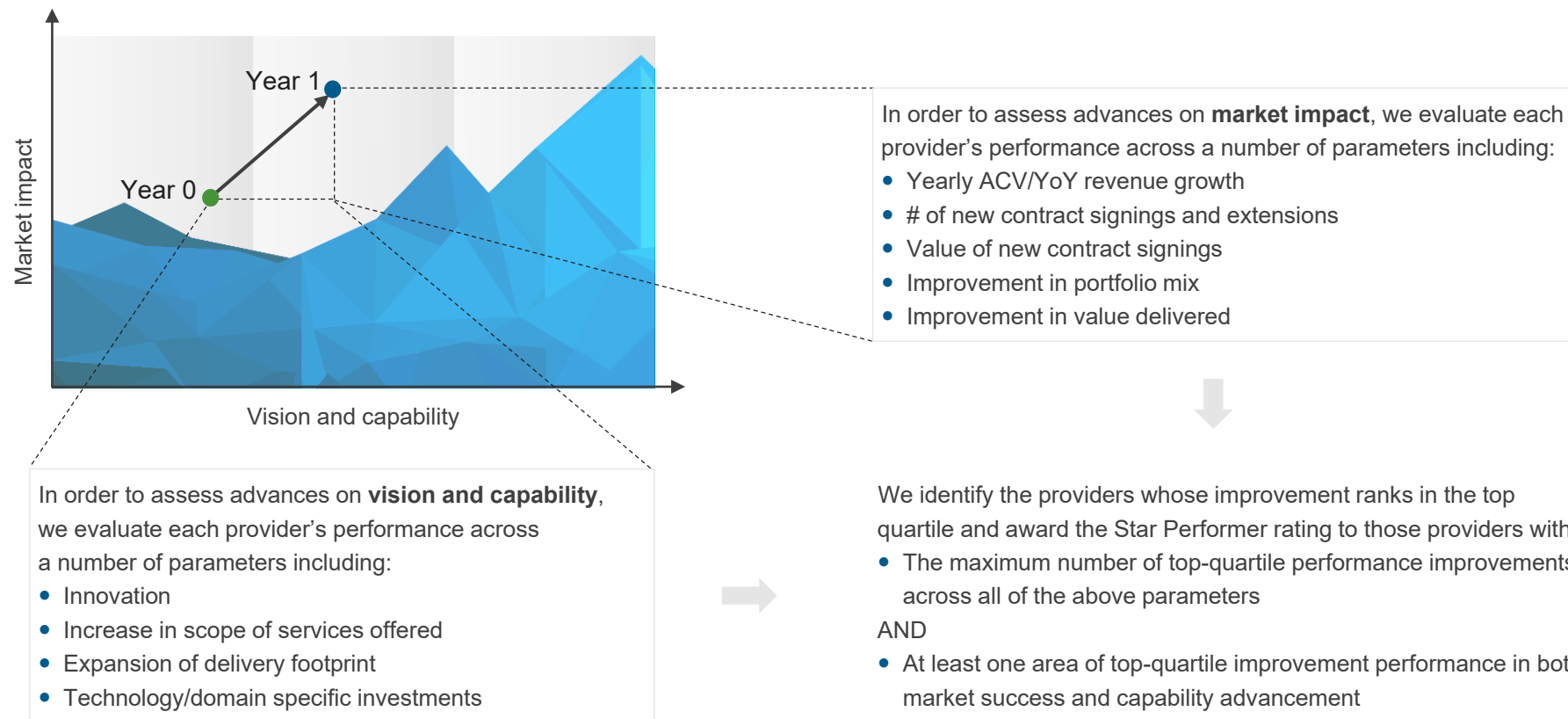
Everest Group PEAK Matrix

Services PEAK Matrix® evaluation dimensions

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

Market impact

Leaders

Major Contenders

Aspirants

Vision and capability

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 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

In order to assess advances on **market impact**, we evaluate each provider's performance across a number of parameters including:

- Yearly ACV/YoY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances on **vision and capability**, we evaluate each provider's performance across a number of parameters including:

- Innovation
- Increase in scope of services offered
- Expansion of delivery footprint
- Technology/domain specific investments

We identify the providers whose improvement ranks in the top quartile and award the Star Performer rating to those providers with:

- The maximum number of top-quartile performance improvements across all of the above parameters

AND

- At least one area of top-quartile improvement performance in both market success and capability advancement

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 in 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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