



Everest Group Trust and Safety Services PEAK Matrix® Assessment 2026

Focus on Accenture
October 2026



Introduction / Research background

The T&S market continued to evolve in 2025, driven by the growing adoption of gen AI and agentic AI, increasing volumes of AI-generated content, sophisticated scams and platform abuse, and heightened regulatory scrutiny. These developments are expanding enterprise T&S requirements beyond traditional content moderation toward AI safety, responsible AI, platform integrity, and regulatory compliance.

Enterprise demand is also shifting toward more complex and specialized T&S services, including AI model evaluation, red teaming, child safety, fraud and abuse prevention, policy support, and emerging physical AI use cases. This is increasing the need for specialist talent such as policy experts, red teamers, prompt engineers, complex annotators, and domain specialists.

In response, service providers are increasing investments in AI-enabled moderation, automated quality assurance, policy and model monitoring, agent assistance, and proprietary AI safety solutions. They are also strengthening technology partnerships, specialist talent pools, flexible workforce models, and global delivery networks to improve scalability, quality, and responsiveness to changing enterprise requirements.

The T&S provider landscape continues to include global IT/BPO and CXM providers alongside specialist firms. Differentiation is increasingly based on the ability to combine scaled operations

with technology, specialist human judgment, and capabilities across higher-complexity areas such as AI safety, platform integrity, regulatory support, and complex review workflows.

In the research, we present an assessment and detailed profiles of 27 T&S providers featured on the [Trust and Safety \(T&S\) Services PEAK Matrix® Assessment 2026](#). 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 2025, interactions with leading T&S providers, client reference checks, and an ongoing analysis of the T&S services market.

The full report includes the profiles of the following 27 leading T&S providers featured on the Trust and Safety Services PEAK Matrix:

- **Leaders:** Accenture, Concentrix, Genpact, TaskUs, ELUS Digital, TP, and Wipro
- **Major Contenders:** Alorica, Cognizant, Conectys, Foundever, GlobalLogic, Highspring, Infosys, ModSquad, Sutherland, TDCX, Tech Mahindra, TTEC, and WebPurify, an IntouchCX Company
- **Aspirants:** Arcgate, Cogito Tech, Covalen, Foiwe, Helpware, HGS and ICUC Social

Scope of this report

Geography: global

Industry: 27 T&S providers

Services: T&S services

Characteristics of Leaders, Major Contenders, and Aspirants

Leaders

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

- Leaders combine broad coverage across the T&S value chain with scaled delivery, specialist talent, and capabilities across content moderation, platform safety, AI support, policy and regulatory services, and quality assurance. They are increasingly supporting more complex and higher-risk workflows through policy experts, red teamers, prompt engineers, domain specialists, and multilingual delivery models
- They continue to differentiate through proprietary technology and partnerships across AI-enabled moderation, automated QA, responsible AI, model assurance, agentic AI, and risk intelligence, while expanding into emerging areas such as advanced platform integrity and physical AI safety and maintaining a strong focus on moderator wellness and workforce resilience

Major Contenders

Alorica, Cognizant, Conectys, Foundever, GlobalLogic, Highspring, Infosys, ModSquad, Sutherland, TDCX, Tech Mahindra, TTEC, WebPurify, an IntouchCX Company

- Major Contenders demonstrate strong capabilities in selected T&S areas such as content moderation, platform safety, AI support, and data operations, and are strengthening their propositions through proprietary tools, partnerships, flexible workforce models, regional delivery expansion, and increasing investment in complex review and specialist talent
- However, capability depth remains uneven across the cohort, particularly in advanced AI governance, continuous model assurance, agentic AI safety, account-level risk, threat intelligence, age assurance, offline harm, and physical AI safety; many also continue to build scale across complex workflows, multilingual delivery, and end-to-end T&S coverage

Aspirants

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

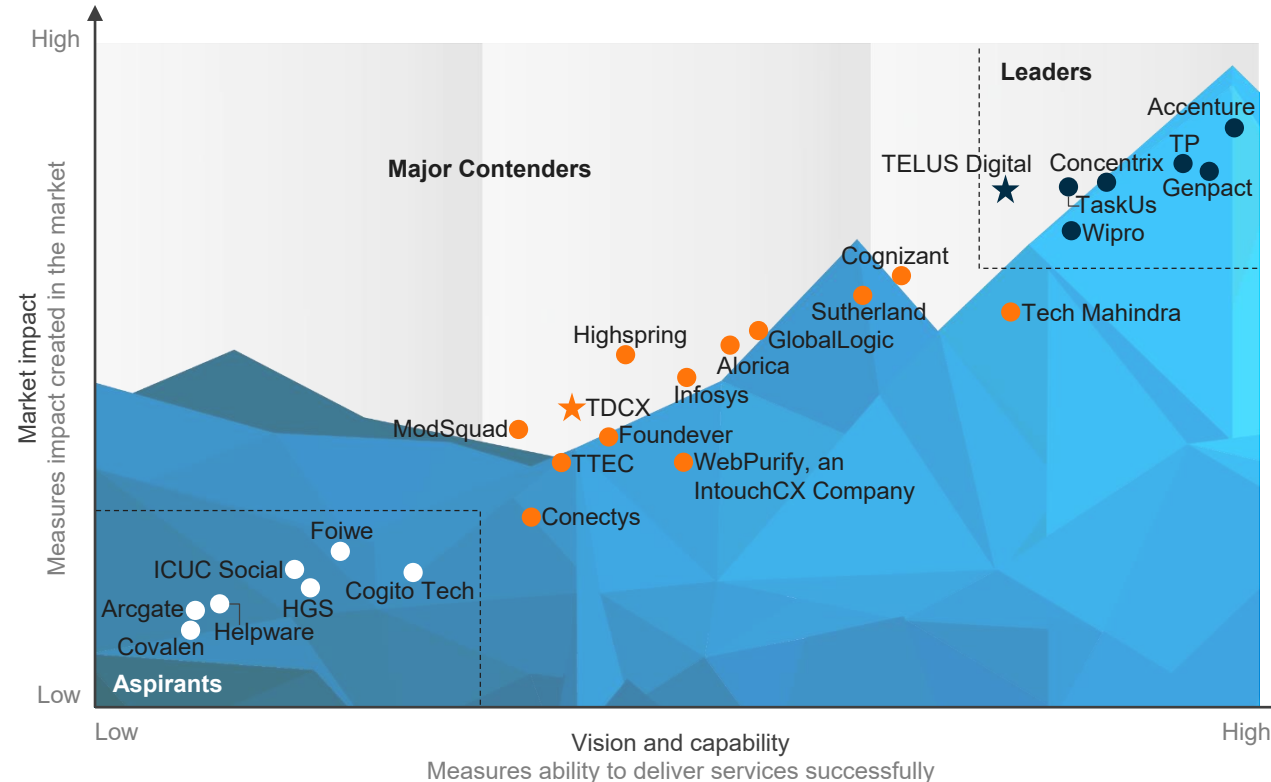
- Aspirants remain primarily focused on content moderation, community and marketplace review, and data annotation, with growing use of AI-assisted moderation and selected AI support capabilities; however, their service breadth, client scale, and delivery footprint remain more limited than Leaders and Major Contenders
- They generally have limited depth across advanced AI safety, platform integrity, regulatory and policy support, proprietary technology, and highly complex or specialist workflows, which may constrain their ability to support large enterprises seeking end-to-end and technology-led T&S services

Everest Group PEAK Matrix®

Trust and Safety (T&S) Services PEAK Matrix® Assessment 2026 | Accenture is positioned as a Leader

Everest Group Trust and Safety (T&S) Services PEAK Matrix® Assessment 2026^{1,2,3,4}

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



1 Assessments for Alorica, Arcgate, Cogito Tech, Conectys, Covalen, Foywe, GlobalLogic, Helpware, ICUC Social, TTEC, and WebPurify, an IntouchCX Company exclude provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with T&S buyers

2 Highspring was featured as Vaco in Everest Group Trust and Safety Services PEAK Matrix® Assessment 2025

3 Analysis for TELUS Digital is based on combined entity post-acquisition of Gear Inc.

4 Assessment for Accenture is based on partial primary inputs

Source: Everest Group (2026)

Accenture

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 continues to support enterprises with content moderation services, bringing deep expertise in contextual content classification, expert review, UGC and AIGC workflows, and regulatory compliance. It serves clients across major industries, geographies, and buyer sizes
- The provider serves AI support services clients through specialist talent for model risk evaluation, red teaming, adversarial testing, and safeguard validation. It also has a dedicated responsible AI practice focused on agentic governance, policy-as-code, and automated compliance, further strengthened by its acquisition of the UK-based AI provider – Faculty
- It has expanded its nearshore T&S delivery capabilities across its delivery centers at Egypt, Colombia, Costa Rica, and Canada, allowing it to better cater to regional languages and offer risk diversification to enterprises
- Accenture leverages its established SynOps for T&S platform and technology ecosystem to support AI-augmented moderation, QA, knowledge management, and AI governance, while using Human-in-the-loop (HITL) oversight for complex and high-risk decisions
- Referenced buyers highlighted client management, delivery quality, and domain expertise as key strengths for Accenture

Limitations

- Accenture’s client portfolio, relative to its peers, remains concentrated among buyers based in North America and Europe. Its ability to serve clients in other geographies remains relatively untested
- While Accenture offers T&S services to clients in all major industries, compared to peers, its scale of presence in the gaming and legal betting, dating, and travel and hospitality industries is limited
- Referenced buyers highlighted pricing competitiveness, decision consistency, workflow efficiency, and proactive escalation and reporting as key areas of improvement for Accenture

Market trends

The T&S outsourcing market experienced steady growth driven by AI support services, rising platform risks, and regulatory scrutiny. However, increasing automation is moderating growth in traditional content moderation

Market size and growth

- The T&S outsourcing services market grew by 3-8% in 2025-26 reaching US\$9.25-10.25 billion
- Growth was driven by:
 - Rising demand for AI support services
 - Increasing AI-generated harmful content
 - Regulatory scrutiny around AI and platform safety
 - Expansion of specialized data annotation and AI evaluation work
- However, outsourced moderation spend growth is declining due to improving AI model accuracy, greater automation, and increasing use of community-led moderation models

Key drivers for T&S services

Growth in AI support services	Enterprises are expanding spend on AI training, model evaluation, RLHF, red teaming, and specialized data annotation.
Increasing complexity of AI-generated content	Growth in AI-Generated Content (AIGC), deepfakes, hallucinations, and harmful AI outputs is expanding the need for expert review and policy enforcement.
Rising regulatory compliance needs	Evolving AI, platform safety, privacy, and child-safety regulations are driving the demand for policy enforcement, regulatory support, responsible AI, and compliance operations.
Shift toward responsible and agentic AI	Providers are building capabilities in AI governance, agentic AI testing, policy-as-code, and model risk monitoring.
Demand for specialist talent	Enterprises increasingly need policy experts, red teamers, prompt engineers, domain specialists, and complex annotators.

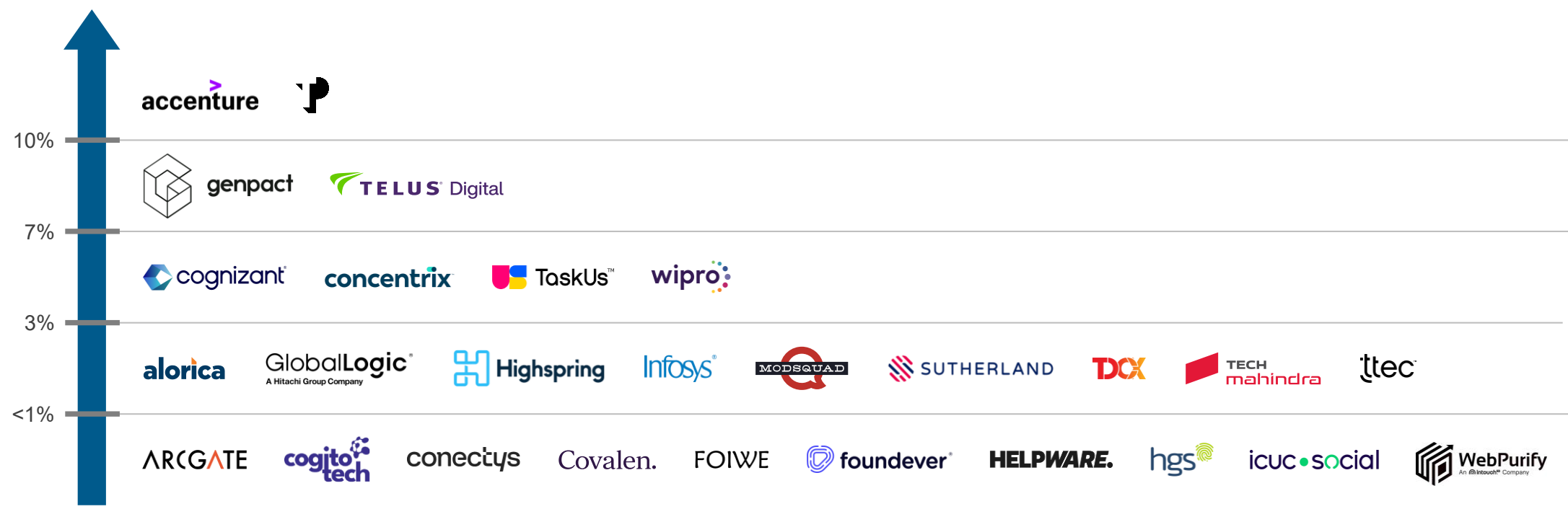
Opportunities and challenges

Continuous AI safety assurance	Demand is expanding beyond pre-deployment testing into ongoing monitoring, drift detection, agent oversight, and incident analysis.
Integrated age assurance and child safety	Enterprises need connected solutions across verification, grooming detection, policy enforcement, investigations, appeals, and regulatory escalation.
Physical AI safety	Post-deployment supervision, exception handling, near-miss analysis, sensor monitoring, and model feedback have significant outsourcing demand.
Responsible AI operationalization remains underdeveloped	Many programs remain policy-led, with limited continuous monitoring, fairness testing, human oversight, and audit-ready governance.
Automation is reshaping human moderation talent	Gen AI and agentic AI are reducing human effort in simpler queues, pressuring traditional FTE-led moderation models.

Provider landscape analysis

The top ten providers now account for 85-90% of the market share in terms of ACV in 2025 compared to 80-85% in 2024

Market share analysis of the providers
2025; percentage of overall market of T&S outsourced services



1 Providers are listed alphabetically within each range

Key buyer considerations

Enterprise buyers prioritize domain expertise, quality, and flexible delivery, with partnership, talent, and value delivered shaping provider selection

Key sourcing criteria



Domain expertise

Proven experience across moderation, platform safety, specialized workflows, and relevant industries to support contextual and complex decision-making



Quality and operational consistency

Ability to maintain accurate, predictable, and policy-aligned outcomes, while meeting operational and performance requirements



Scalability and flexibility

Ability to ramp-up rapidly, adapt to changing volumes and policies, and support niche or non-standard workstreams across locations



Partnership and responsiveness

Strong communication, proactive problem-solving, account leadership, and willingness to understand and align with buyers' business objectives



Talent, resilience, and workforce management

Access to skilled talent supported by effective hiring, training, retention, workforce planning, and moderator wellness programs



Cost and commercials

Competitive and flexible pricing that balances cost efficiency with quality, specialist expertise, and sustainable service delivery

Summary analysis

T&S expertise, quality, and flexibility remain the strongest sourcing considerations, as buyers seek providers that can deliver consistent outcomes across complex and evolving workflows.

Partnership and talent practices are key differentiators, with buyers valuing proactive communication, strong account leadership, skilled talent, effective training, and moderator wellness.

Cost, technology, and automation remain important; however, buyers increasingly assess them in the context of overall value delivered, operational reliability, and measurable productivity improvement.

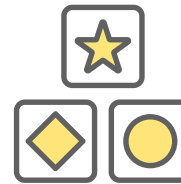
Key takeaways for buyers

Buyers should evaluate T&S providers as integrated risk and safety partners, rather than scaled content moderation vendors. The strongest providers combine domain expertise, technology-enabled operations, specialist human judgment, flexible delivery, and workforce resilience to deliver measurable improvements in quality, productivity, regulatory compliance, and user safety



Shifts in provider capabilities

T&S providers are expanding beyond traditional content moderation into platform integrity, AI safety, regulatory support, complex investigations, and specialized review workflows, combining AI-enabled detection and automation with expert human judgment



Differentiation across provider types

Service providers differentiate through scale, broad delivery networks, technology integration, and consulting capabilities, while specialist providers compete through agility, niche expertise, flexible talent models, and deeper experience in specific industries or harm categories



Key innovations

Agentic moderation, automated quality assurance, policy-as-code, AI-assisted reviewer workflows, continuous model monitoring, red teaming, and advanced risk intelligence are emerging as important areas of differentiation

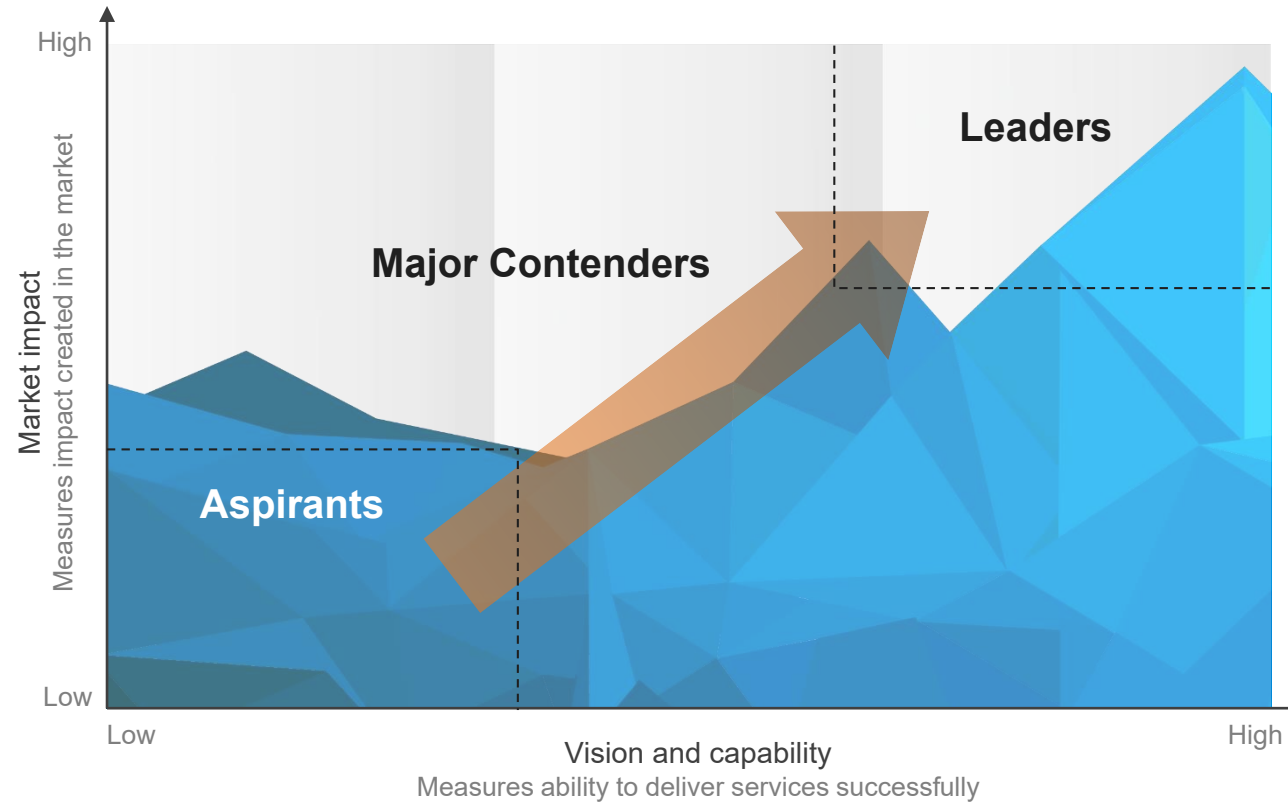
Appendix

PEAK Matrix® framework

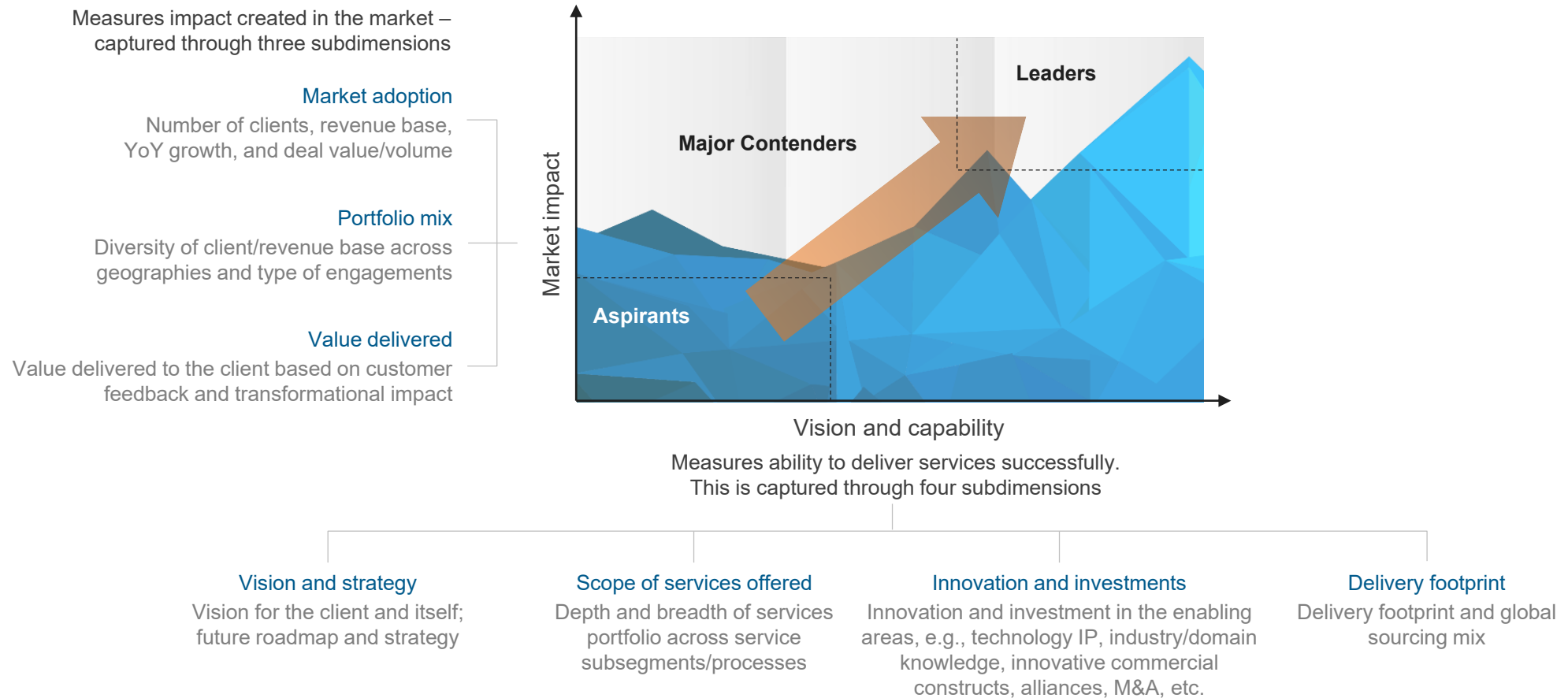
FAQs

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.

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