



Everest Group Enterprise Immersive Experience Services PEAK Matrix® Assessment 2024

Focus on Avanade
May 2024



Introduction

Adapting to an experience-first mindset is increasingly becoming inevitable for enterprises across the globe. As the immersive experience landscape evolves from a pioneering phase to a full realization stage, it promises to redefine both consumer and enterprise experiences in the digital realm. Despite its nascent stage, enterprises perceive its value and plan to scale up investments. Maturing technologies such as extended reality, cloud and edge computing, 5G networks, and the increasing digitization of social and work interactions are paving the way for the immersive experience's acceptance and growth.

At the same time, successful immersive experience adoption hinges on the careful assessment of infrastructure requirements, understanding business value, and effectively managing user adoption risks.

In the full report, we present an assessment of 16 service providers featured on the [Enterprise Immersive Experience Services PEAK Matrix® Assessment 2024](#), a comprehensive matrix that evaluates and categorizes

service providers in terms of their capabilities.

The assessment is based on Everest Group's annual Request for Information (RFI) process for the calendar year 2024, interactions with leading immersive experience service providers, client reference checks, and an ongoing analysis of the immersive experience services market.

This report includes the profiles of the following 16 leading immersive experience service providers featured on the Enterprise Immersive Experience Services PEAK Matrix:

- **Leaders:** Accenture, EY, TCS, and Tech Mahindra
- **Major Contenders:** Avanade, Capgemini, Deloitte, LTIMindtree, Merkle, NTT DATA, Publicis Sapient, and Tata Elxsi
- **Aspirants:** Coforge, Foundever, RRD, and Sapizon

Scope of this report

Geography: Global

Industry: Digital services, engineering services, and interactive experience services

Use cases: Only publicly available information (~150+ distinct use cases) has been used for the entire analysis in this report

Enterprise immersive experience services PEAK Matrix® characteristics

Leaders

Accenture, EY, TCS, and Tech Mahindra

- Leaders display a strong ability to deliver end-to-end immersive experience engagements with robust offerings and market proof points across design/consulting, implementation, and managed services
- Strong vision and narrative around stakeholder experience that includes customers, employees, partners, and the society
- Strong focus on next-generation technologies such as AI, edge computing, blockchain, IoT, computer vision, and AR/VR to deliver enhanced immersive experience services
- Strong global delivery and client footprint supplemented by a well-distributed network of experience labs or studios

Major Contenders

Avanade, Capgemini, Deloitte, LTIMindtree, Merkle, NTT DATA, Publicis Sapient, and Tata Elxsi

- Major Contenders have a strong narrative around the underlying role of technology and platforms to orchestrate scalable immersive experiences
- Strong partnership ecosystem with leading immersive experience players across the value chain including design and consulting, implementation, and managed services
- Focus on investments in innovation hubs and design studios to enhance the delivery footprint
- Strong investments in frameworks and solutions to enable faster value realization for their clients

Aspirants

Coforge, Foundever, RRD, and Sapizon

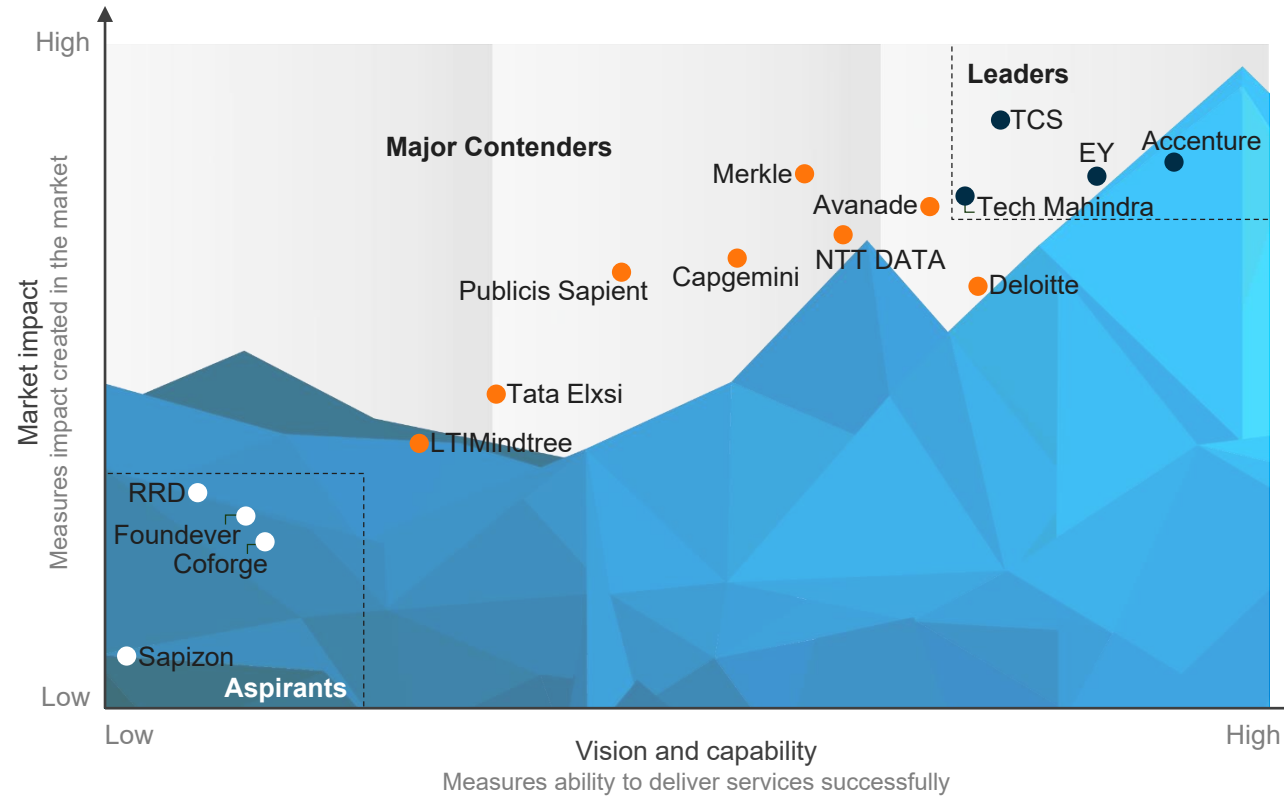
- Aspirants are focused on specific industries, service areas, or markets
- Have the technical capabilities and talent to serve as technology enablers in the immersive experience journey of enterprises

Everest Group PEAK Matrix®

Enterprise Immersive Experience Services PEAK Matrix® Assessment 2024 | Avanade is positioned as a Major Contender

Everest Group Enterprise Immersive Experience Services PEAK Matrix® Assessment 2024¹

- Leaders
- Major Contenders
- Aspirants



¹ Assessments for Accenture, Capgemini, Coforge, Deloitte, EY, LTIMindtree, Publicis Sapient, and Sapizon exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with insurance buyers
Source: Everest Group (2024)

Avanade profile (page 1 of 5)

Overview

Vision for immersive experience services

Avanade, a joint venture between Microsoft and Accenture, envisions a future where immersive 3D experiences blend physical, digital, and artificial realms, revolutionizing how people work and interact. Leveraging advances in cloud, data, and AI, it aims to lead this transformation by enabling immersive, inclusive collaboration and innovation aligned with Microsoft's vision. With a focus on practical applications across industries such as energy, utilities, manufacturing, and transportation, Avanade seeks to deliver immediate value while laying the groundwork for broader immersive experience initiatives.

Engagement characteristics (2023)

Number of engagements	280-290	No of clients served	190-200
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Extent of confluence of foundational technologies

● Low (<10%) ● Medium (10-50%) ● High (>50%)

Extent of confluence of foundational technologies

- | | | |
|----------------------------------|--------------------------------|---------------------------------|
| ● Spatial computing and mapping | ● Internet of Things (IoT) | ● Hardware and chipsets |
| ● Cloud computing, edge, 5G (6G) | ● Artificial Intelligence (AI) | ● Blockchain and digital assets |

Percentage of client engagements (2023)

Engagement by service segments

● Low (<10%) ● Medium (10-30%) ● High (>30%)

- | | | |
|-----------------------|---------------------------|--------------------|
| ● Consulting services | ● Implementation services | ● Managed services |
|-----------------------|---------------------------|--------------------|

Engagement by industry

● Low (1-10%) ● Medium (10-15%) ● High (>15%)

- | | | |
|--------------------------------|---------------------------------|--|
| ● BFSI | ● Energy and utilities | ● Hi-tech |
| ● Healthcare and life sciences | ● Retail, distribution, and CPG | ● Telecom, media, gaming and entertainment |
| ● Manufacturing | ● Travel and transport | ● Other |

Engagement by geography

● Low (1-10%) ● Medium (10-30%) ● High (>30%)

- | | | |
|-----------------|-----------------|--------------------------|
| ● North America | ● Europe | ● United Kingdom |
| ● Asia Pacific | ● Latin America | ● Middle East and Africa |

Avanade profile (page 2 of 5)

Case studies and thought leadership

CASE STUDY 1

Avanade's Augmented Reality (AR) solution enabled cycling enthusiasts to explore personalized accessory options and make purchases with convenience

Business challenge

The client aimed to improve accessibility for bike accessories and parts by developing an AR application for easy item identification. They also planned to use this technology in-store to simplify bike configuration and accessory purchases at checkout.

Solution and impact

Avanade integrated a new AR functionality alongside Azure remote rendering to create an application capable of recognizing the customer's bike and providing a customized list of accessories and customizations. This AR experience allowed customers to visualize the products on their bikes using the phone's camera. Avanade further enhanced the solution by connecting the Power App to a Point-of-Sale (PoS) system, streamlining the checkout process for a seamless end-to-end customer experience.

Impact

- Improved resilience, agility, and responsiveness
- Achieved its vision of enhancing business operations and positively impacting lives

Thought leadership (representative list)

Description

Digital twins: far more than a pretty picture for manufacturers

Blockchain metaverse revolution: transforming life sciences through the next frontier

Navigated the metaverse: three essential actions for government preparedness

Metaverse financial services: embracing The Matrix for next-generation customer engagement

Website link

www.avanade.com/

www.avanade.com

www.avanade.com

www.avanade.com

CASE STUDY 2

Transformed merchandising: Avanade's immersive planogram solution optimized store layouts and maximized sales

Business challenge

The client sought to enhance the merchandising experience by leveraging existing planogram systems to create a complete virtual model of the store. This initiative aimed to make the shopping experience more immersive and intuitive in mixed reality.

Solution

Avanade developed a customized application using Unity and Microsoft's Mixed Reality Toolkit (MRTK) to create a system that integrated with existing planogram processes. This solution, the Virtual Planogram, empowered merchandizers to effortlessly import models and data into the platform without disrupting their current workflow. By overlaying real-time analytics and sales data onto the virtual model, Avanade enabled merchandizers to identify product performance trends and simulate various placement scenarios to enhance efficiency and maximize profitability.

Impact

- Enhanced the planogramming experience with immersive and intuitive capabilities
- Augmented and virtual reality support
- Real-time product placement manipulation

Avanade profile (page 3 of 5)

Immersive experience platforms, partnerships, and investments

Proprietary (in-house) immersive experience platforms (representative list)

Platform	Details
Front-line worker accelerators	It involves capturing data on retail assets such as refrigerators to predict and identify faults. This information is then integrated into the Microsoft Sustainability Manager, facilitating proactive fault management.
Virtual exposure therapy	It delivers virtual reality simulations to help patients confront and overcome their phobias by immersing them in controlled environments tailored to their specific fears.
Intelligent and sustainable store	It is a solution for front-line workers in various industries, providing real-time, context-based information to enhance efficiency and effectiveness.

[NOT EXHAUSTIVE]

Proprietary (in-house) immersive experience platforms (representative list)

Platform	Details
Microsoft	Allied with Microsoft, as a strong global enterprise partner, for specializing in the development, deployment, and expansion of solutions leveraging Microsoft's cloud offerings
Metrikus	Partnered with Metrikus to redefine smart spaces by developing innovative solutions focused on IoT sensor creation and enhancement
NVIDIA	Partnered with NVIDIA, through its parent company Accenture, to enhance the omniverse technology to deliver Extended Reality (XR) experiences that meet the scale and speed requirements of clients

Avanade profile (page 4 of 5)

Immersive experience platforms, partnerships, and investments

[NOT EXHAUSTIVE]

Immersive experience investments (representative list)

Platform	Details
Talent initiatives	<ul style="list-style-type: none"> • Design Thinking (LUMA Institute) – the primary framework for ideation work within immersive solutions • Microsoft MVP – it positioned as thought leaders in collaboration with Microsoft, showcasing expertise in Mixed Reality (MR), AI, and IoT • Unity Development Certified Professionals – it has effectively showcased capabilities within the 3D/immersive space
Solutions and accelerators	<ul style="list-style-type: none"> • Acquired Kabel to strengthen and expand its expertise in immersive experience and digital technologies, with a particular emphasis on data and AI, cloud infrastructure and management, software development, and XR applications, bringing 300 new employees to Avanade Spain • Developed an immersive studio model for clients to be able to subscribe to a managed service that continuously evolve their immersive experiences • Developed a – Try before you buy – SaaS offering for clients to be able to securely drive proof of values(PoVs)/proof of concepts (PoCs) in immersive spaces
Labs and CoEs	Created an immersive delivery center, a cross-functional capability to build industry IP/assets and PoVs with clients
Others	<ul style="list-style-type: none"> • Community of practice – invested in establishing a global community of practice for cross-border knowledge sharing and collaboration • Immersive R&D – invested in established an immersive delivery center for building industry IP/assets and PoVs with clients • Digital twin consortium membership – invested in collaborating with the digital twin consortium to advance industry digital twin solutions and enhance internal expertise










Avanade profile (page 5 of 5)

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

- Avanade's integrated approach combines strategy, technology, and user experience design to develop immersive experiences using Microsoft technologies. It also assists clients in understanding business impacts and organizational changes, benefiting from Accenture's resources for accelerated growth and service delivery
- It has a well-balanced client spread (both in terms of buyer size and buyer geography) and delivery footprint across key geographies – North America, Europe (including the UK), and rest of world ROW, including APAC
- Industry-tailored solutions are a core strength, given considering its ability to provide immersive experience services across more than 20 different industries. Other strengths include an ecosystem of partnerships and deep client relationships
- The creation of an immersive R&D center and acquisition of Kabel has strengthened the firm's expertise and capabilities in delivering immersive experiences

Limitations

- Although Avanade maintains a diverse services portfolio, it currently receives a relatively low proportion of engagements from the telecom, media, and entertainment vertical, which is a significant segment for immersive experiences
- While the focus on adding immediate value to clients is emphasized in the firm's vision, clients may benefit from a more detailed roadmap or concrete use cases of how Avanade can deliver practical opportunities and set the groundwork for broader immersive experience programs

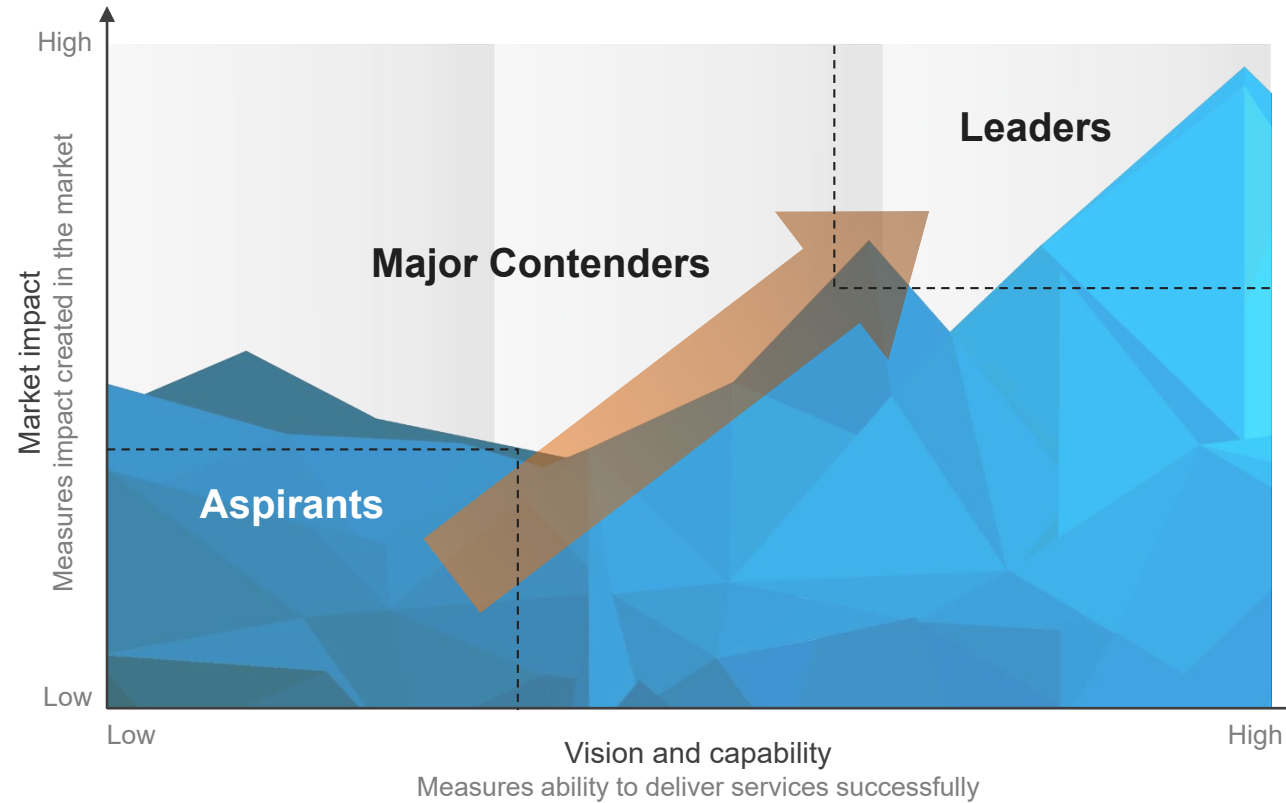
Appendix

PEAK Matrix framework

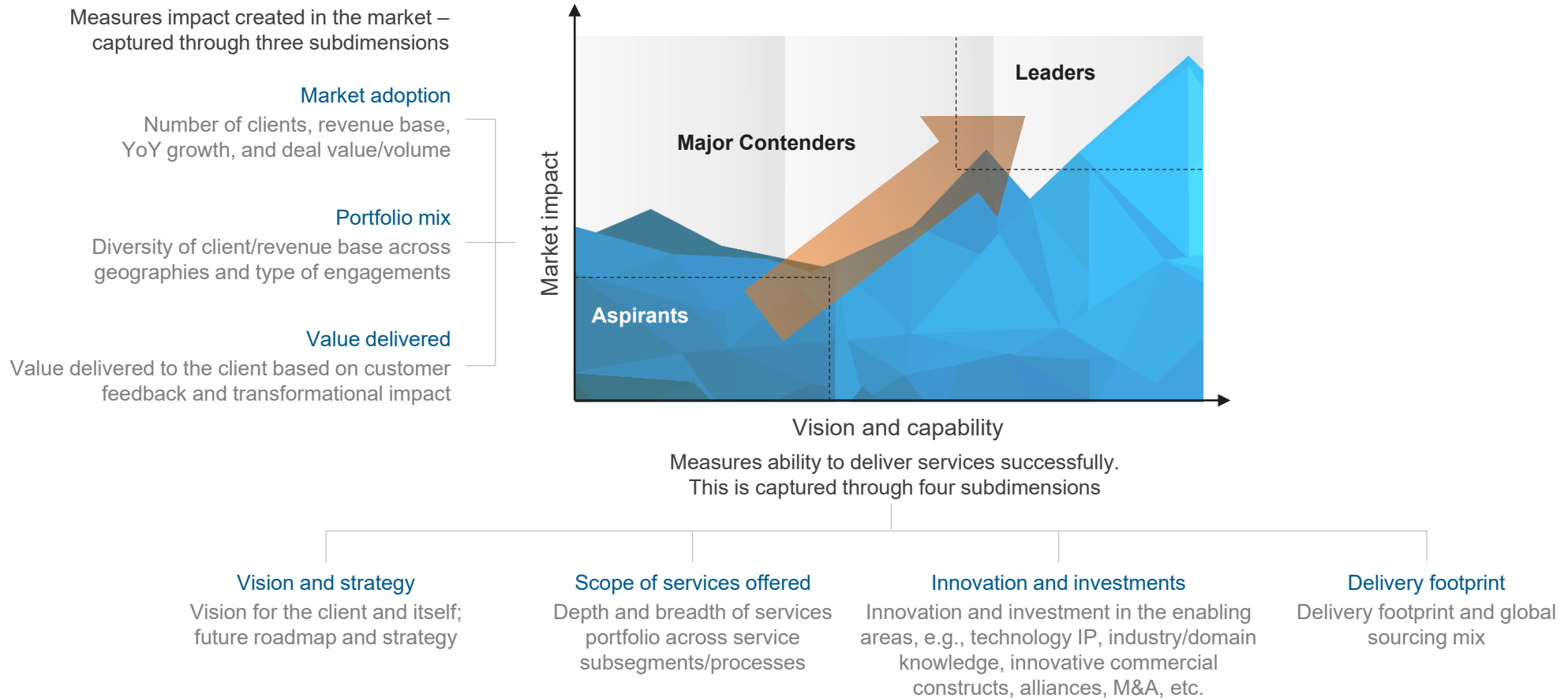
FAQs

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



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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