



How the Metaverse will Remake your Strategy



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+

Do you
know what
this is?





Metaverse =

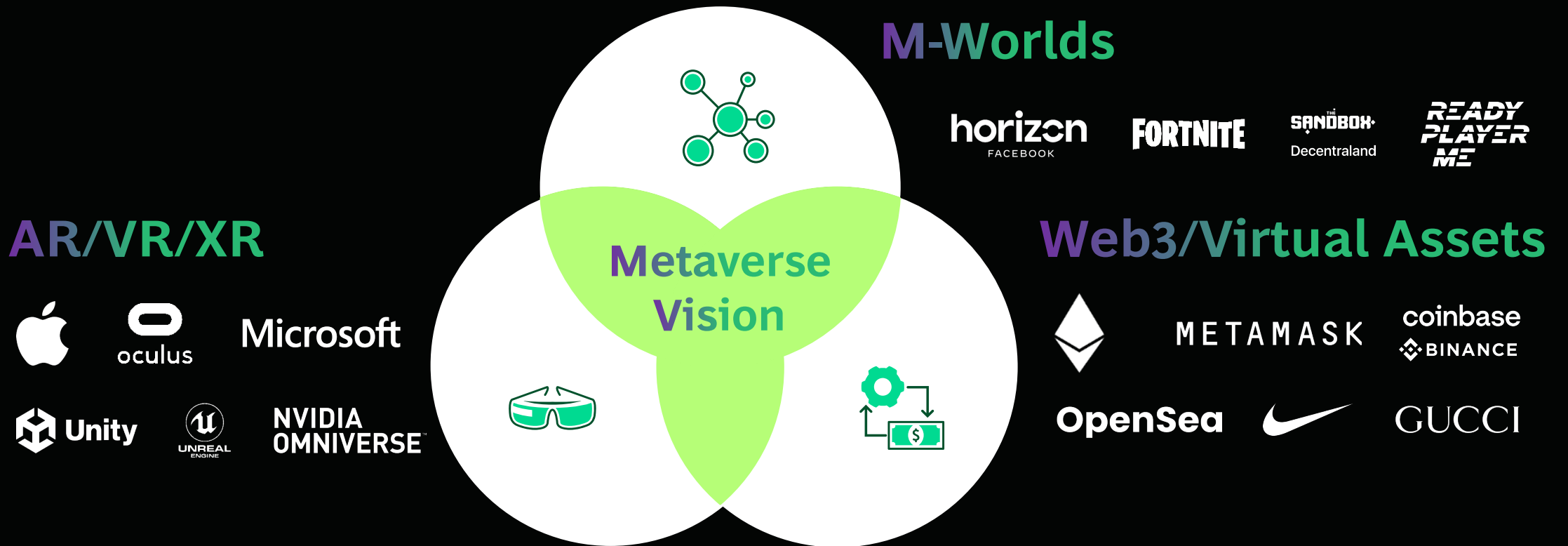
Meta (beyond) + Verse (universe)

A new universe beyond the present one





Metaverse | M-Worlds, AR/VR/XR & Web3 Constitute The Metaverse

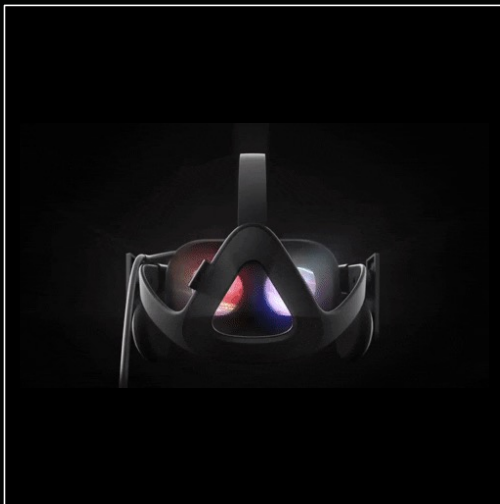


Note: AR/VR/MR—Augmented, Virtual and Mixed Reality; M-Worlds—(Eco-) systems/platforms for Metaverses; Web3—blockchain-based next gen of internet/Virtual Assets—digital representation of value that can be digitally traded
 Source: Matthew Ball, Bloomberg, ARtillery, Binance Research, BCG report, BCG analysis



Metaverse | Changes Work, Life, Health, Entertainment & Commerce

AR/VR/XR



Web3/Virtual Assets



M-Worlds



Metaverse Applications | The Metaverse Enables Many Real-World Use Cases



Consumer

- Immersive product demos/trials
- Personalized store layouts
- Immersive dining and shopping experiences
- Home and interior design
- Customer assistance
- Warehouse navigation, delivery picking, inventory mgmt.



Healthcare

- Enhanced surgical assistance
- Assisted-living communities/patient care
- Medical imaging
- Medical-training augmentation
- In-home health and wellness



Travel and tourism

- Technician/pilot training
- Virtual tour guides
- Mixed-reality theme park
- Concert/show enhancement
- Multisensory experiences unconstrained by time/space/weather
- Immersive and interactive televisions



Financial and professional services

- Virtual cards/card readers for payments
- Immersive-content presentations
- Blockchain to enable smart contracts
- News and information sources
- Banks



Industrial goods and transportation

- Logistics scanning equipment
- Auto design models
- Remote machine maintenance
- Safety tutorials
- Design, R&D
- Inventory and delivery network management



Technology, media, and telecommunications

- Field technician support and training
- Movie set design and location scouting
- Advanced-technology prototyping
- Fabrication facility design
- Gamification
- Immersive-content consumption



Public sector and not-for-profits

- Law enforcement training
- Smart cities and emergency planning
- Immersive classrooms, training and teaching assistance
- Military training
- Battlefield management



Construction and real estate

- Building fixture selection
- Building design, engineering, architecture
- Safety tutorials/training (construction)
- Realtor home showings



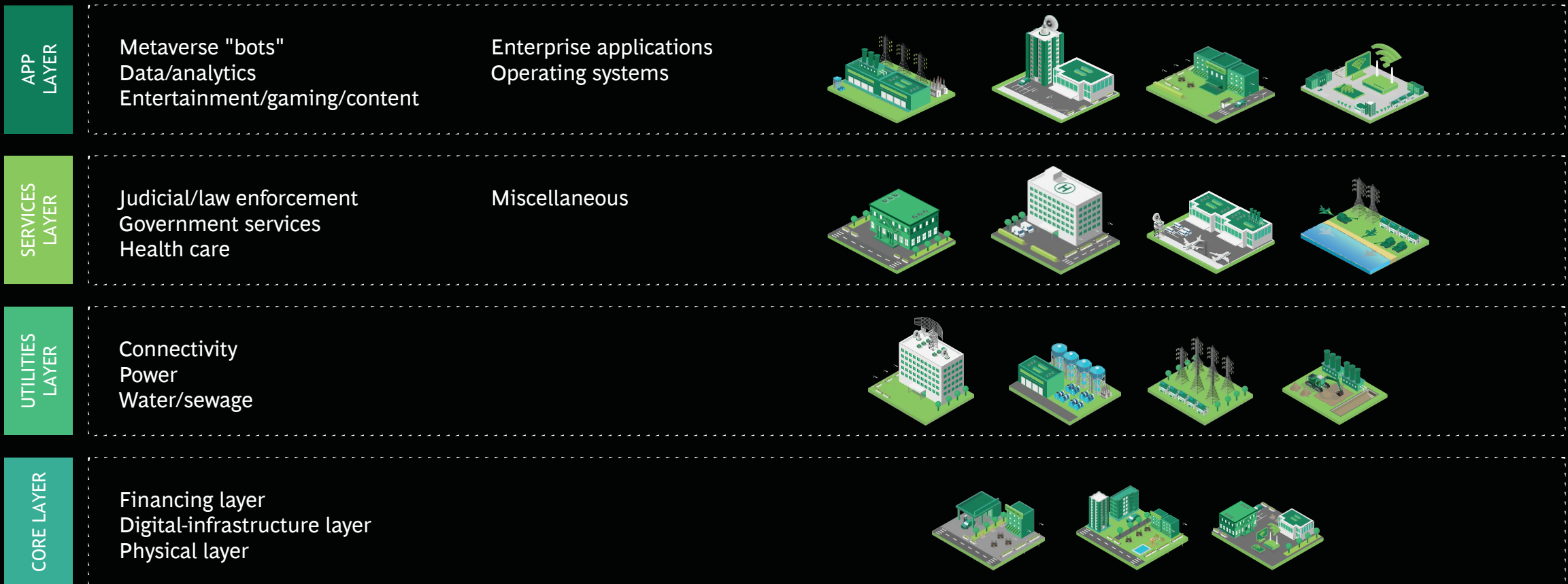
Energy

- Oil rig, mine, wind turbine employee training
- Locating/tagging underground utilities
- Remote maintenance assistance
- Training and field management





Metaverse Layers | The Metaverse Visualized





Case Study | Examples of B2B Metaverse Use Cases for a Large Retailer



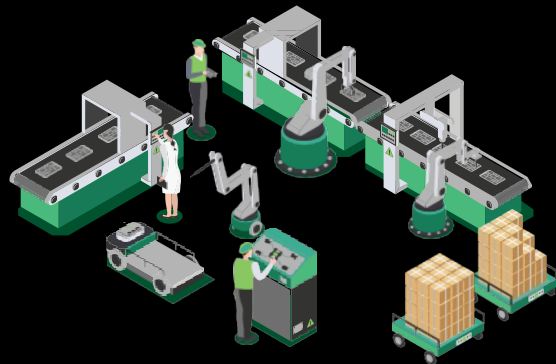
Use cases

Staff onboarding and training

Potential impact

1.5 - 2 percentage points

Cost reduction from decrease in training time and improved customer assistance



In-store experience

\$200 million - \$400 million

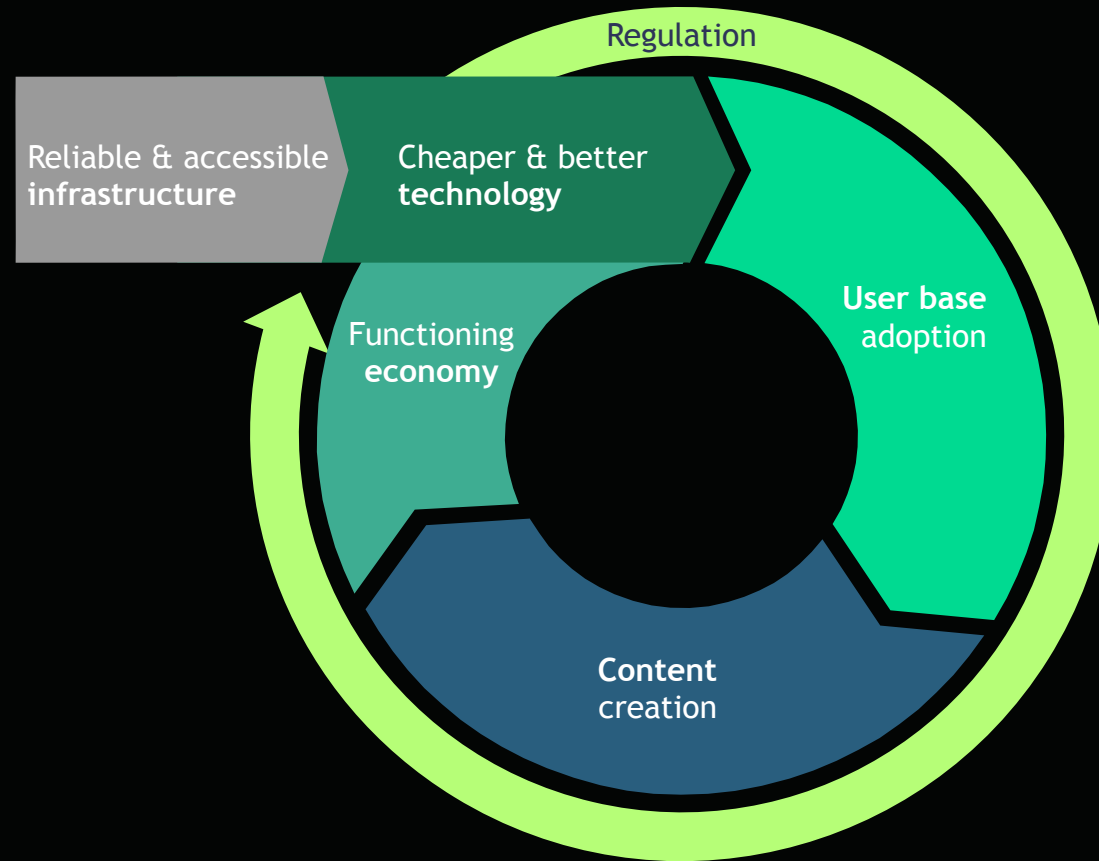
Margin upside from increased store traffic and customer loyalty due to improved customer experience

Inventory management

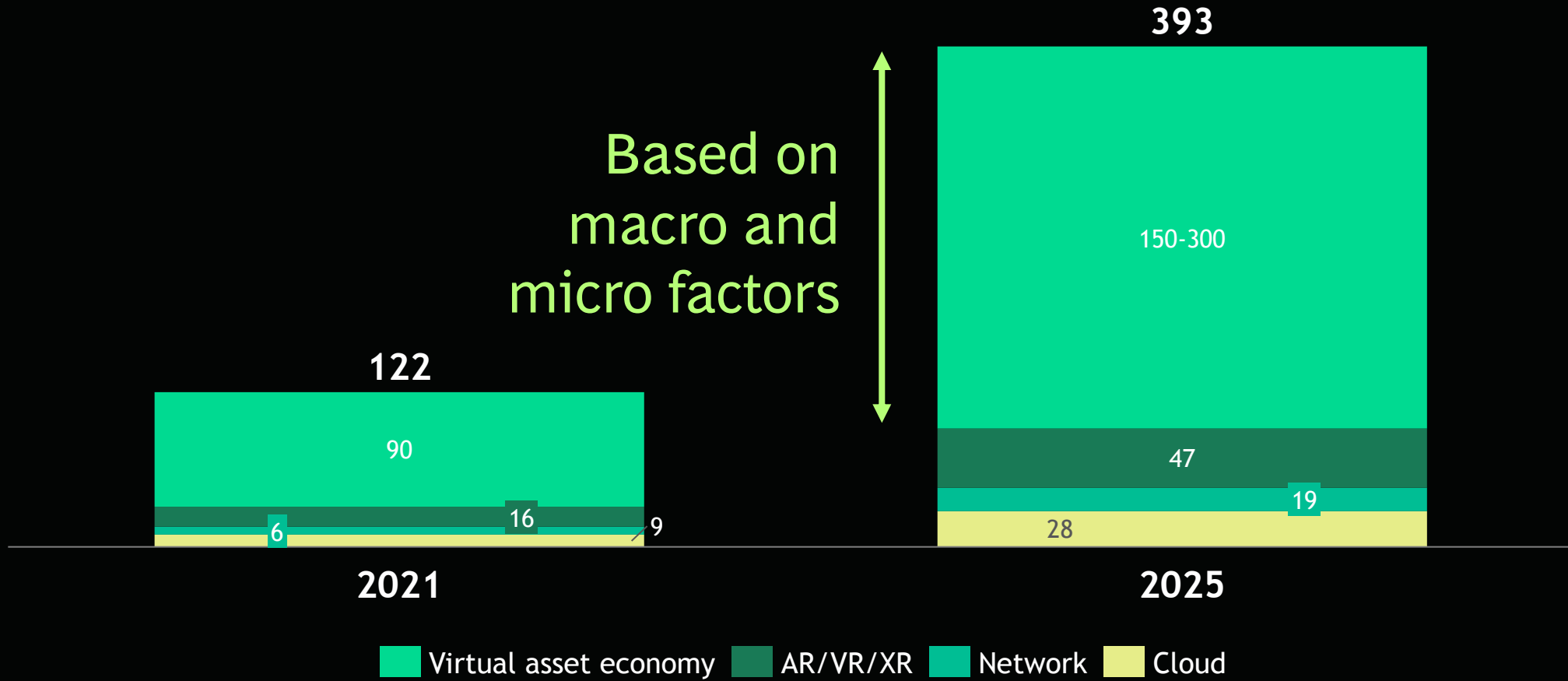
\$500 million - \$750 million

Margin upside from streamlined operations and improved control of inventory

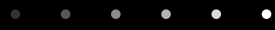
Metaverse | Flywheel



Metaverse | Market (\$bn)



Note: AR/VR/MR—Augmented, Virtual and Mixed Reality; M-Worlds—(Eco-) systems/platforms for Metaverses; Web3—blockchain-based next gen of internet/Virtual Assets—digital representation of value that can be digitally traded; Blockchain infrastructure expected to be stable or decreased thanks to proof-of-stake generalization
 Source: 2021 figures, Matthew Ball, Bloomberg, ARtillery, Binance Research, BCG report, BCG analysis



Metaverse "Building Blocks" | Metaverse is made up of many different components, critical to identify areas with “right to win”

CONTENT & EXPERIENCE

Non-exhaustive



Applications, content & M/V-worlds

The worlds, experiences, services, products and events that serve as the main motivations for users to adopt and engage in the metaverse



Navigation & discovery

The storefronts, social media and marketplaces where people are introduced to (marketing) and access (app stores) various experiences, content and m-worlds

SERVICES



Digital identity

Tools that enable creation & management of self-sovereign identity & avatars



Blockchain assets

Solutions for the issuance, adoption & transfer of blockchain assets



Transaction services

Tools that facilitate the creation & exchange of value within the metaverse



AdTech

Solutions & platforms that enable the ad value chain in metaverse

USER HARDWARE



Devices & Interfaces

Hardware and interfaces that people use to interact with and in the metaverse

DEVELOPER STACK



Developer Tools

Tools for professional end-to-end development in the Metaverse



Creator tools

Consumer no-code tools to enable creation of applications & content



DLT²

Solutions that enable decentralized access to & validation of data



Digital twin

Virtual simulation and analysis of real world/physical assets and/or processes

INFRASTRUCTURE



Security

Solutions that undergird the integrity of the metaverse



Data, storage & compute

Solutions & platforms for storage and computation of data



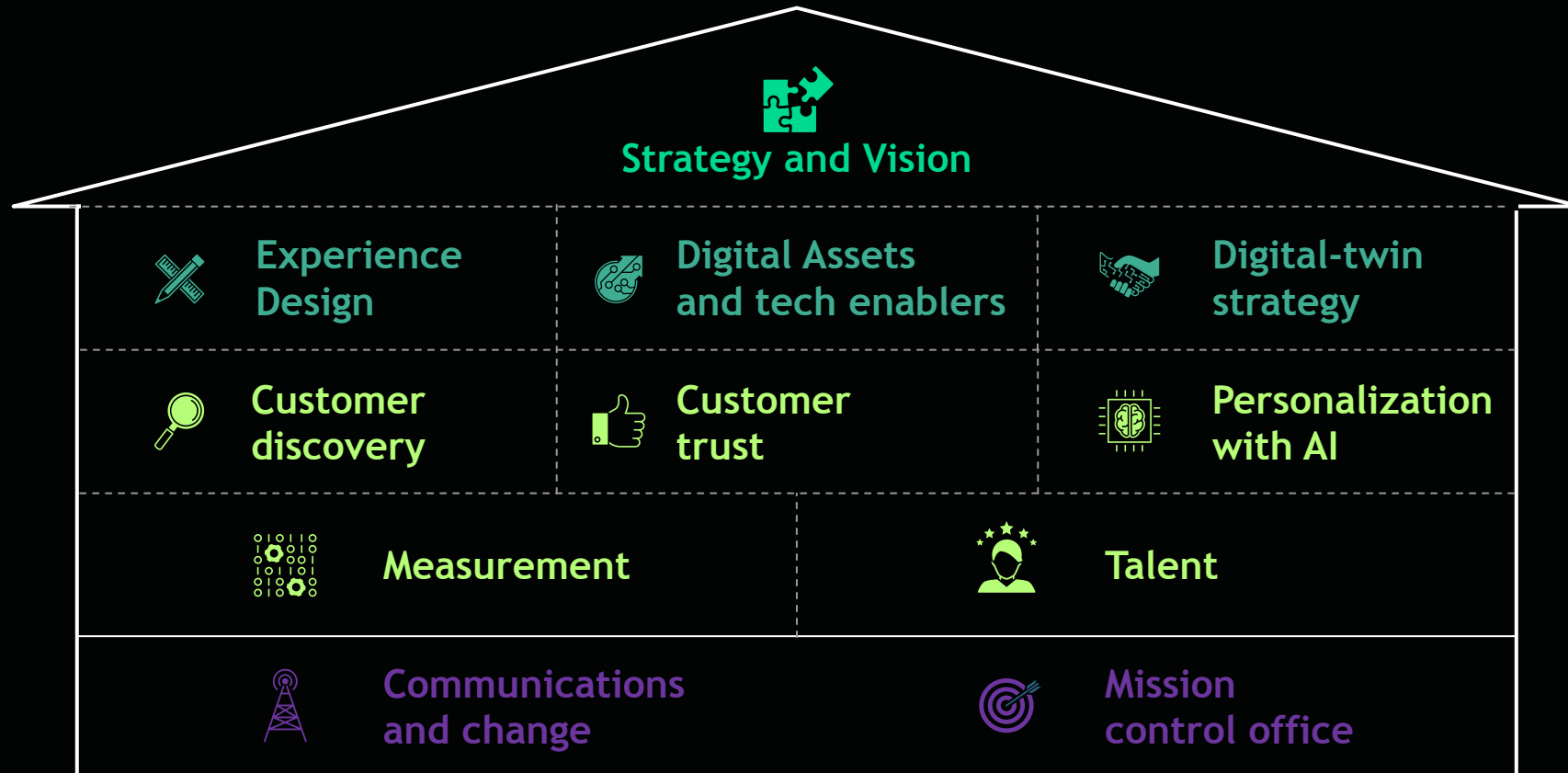
Connectivity

Fixed & mobile telco network access to the internet and other network services (e.g., fiber, Wi-Fi, and eventually high-bandwidth and low latency networks); core connectivity protocols

Standards & protocols¹
Organizations that develop standards for interoperability across the metaverse

1. Not a standalone value pool, however highly important for ecosystem interoperability 2. Distributed Ledger Technology
Source: BCG Analysis

Metaverse | Key Components Of A Metaverse Strategy And Capability



5

Five Steps to Building a Metaverse Capability

1

Set a broad vision for what you want to achieve, including clear definitions of what to do and what not to do. The willingness to experiment, fail, learn, and move quickly to the next use case is key.

2

Experience Design. Design the user experience to deliver value for both the user and the organization, ensuring adoption and ROI.

3

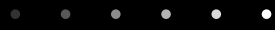
Create a digital-twin strategy. Look for opportunities to automate or digitize operations and develop IoT use cases across verticals that support the current and future business roadmap.

4

Develop the capabilities to compete. Assess internal talent capabilities (the right engineering teams, for example) and identify gaps. Establish a plan to hire or otherwise acquire the necessary skills to ensure success.

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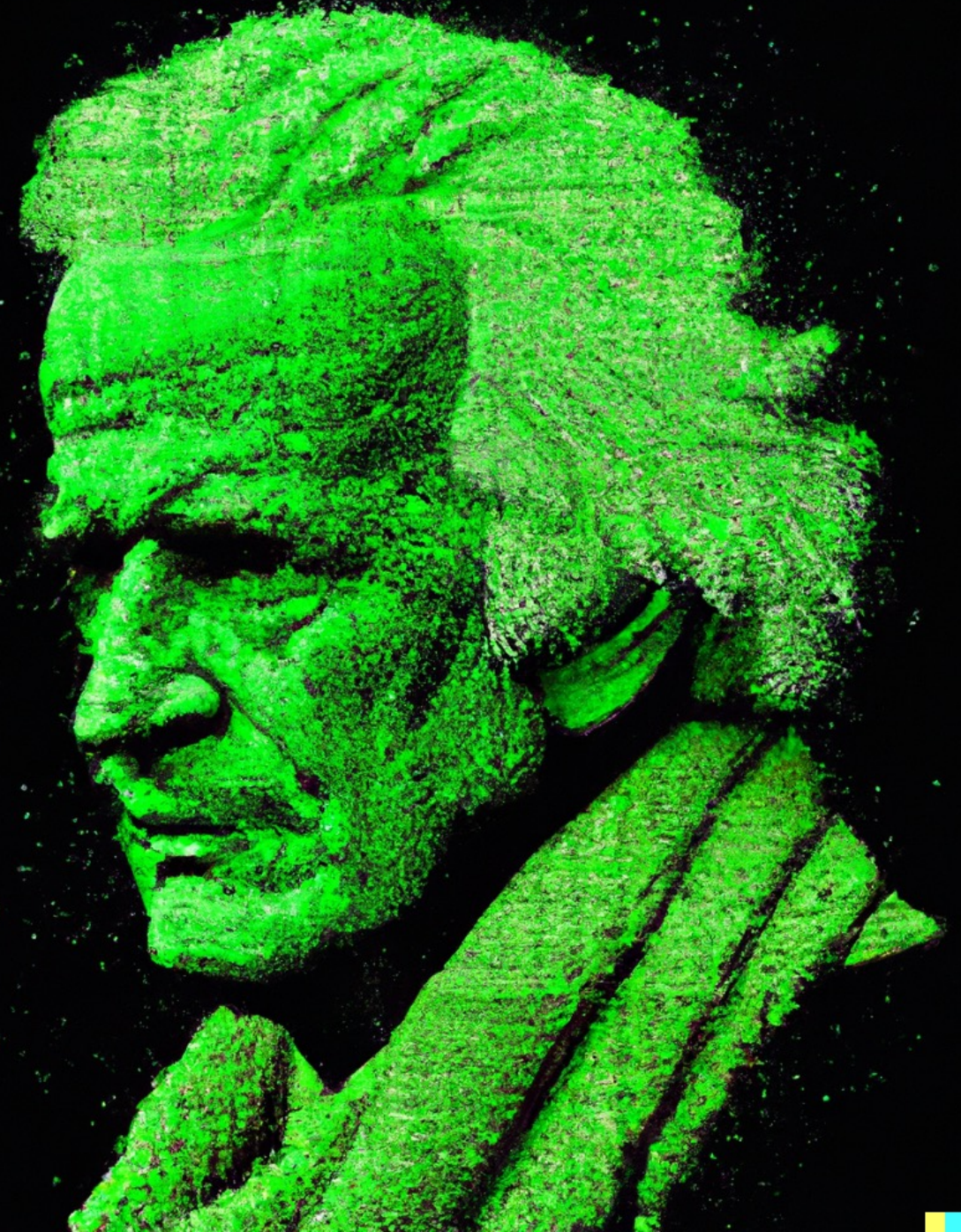
Establish a mission control office with a clear mandate and processes to monitor and oversee the metaverse effort. Define the target path, highlight dependencies across teams, and de-risk the overall plan.



Arthur Schopenhauer's Truth Hype Cycle

1. It is Ridiculed
2. It is Violently Opposed
3. It is Self-Evident

Source: Arthur Schopenhauer (1788-1860)



Tibors
Metaverse
Reading List

