

Digital Interactive Experience (IX) Services Provider Compendium 2023 – Europe

December 2023: Complimentary Abstract / Table of Contents



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- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG Information Technology
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
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Introduction

European enterprises are rapidly embracing user experience design, prioritizing seamless interactions across customer, employee, and partner domains. Their dedication to excellence is grounded in a commitment to sustainability and ethical practices, extending to the development of holistic stakeholder experiences for the eco-conscious European consumer base. Concurrently, these enterprises are actively investing in cutting-edge technologies such as Generative AI, Blockchain, and the Metaverse, reinforcing their leadership in design innovation.

In the realm of creative design services, Global System Integrators (GSIs) are emerging as formidable competitors to native design agencies in the region, reflecting a comprehensive and forward-thinking approach. By blending technology, sustainability, and superior design, European enterprises are strategically positioned at the forefront of this dynamic business landscape, where creativity converges with technological advancements to shape the future of user experiences..

In this research, we present an assessment of 21 service providers featured on the [Digital Interactive Experience \(IX\) Services PEAK Matrix® Assessment 2023 – Europe](#), a comprehensive matrix that evaluates and categorizes service providers in terms of their capabilities in the space.

The assessment is based on Everest Group’s annual Request for Information (RFI) process for the calendar year 2023, interactions with leading IX service providers, client reference checks, and an ongoing analysis of the IX services market.

Scope of this report



Geography
Europe



Digital IX providers
21



Services
Digital Interactive
Experience (IX) services

Scope: Digital Interactive Experience (IX) service providers

IX strategy and consulting services

Stakeholder experience transformation consulting across IX solution segments includes experience design strategy, commerce strategy, digital product envisioning, campaign and marketing communication strategy, market research planning, content strategy, and return-on-investment (RoI) model design.

Design services

Design services include user experience research and design, customer journey and persona mapping, wireframing and prototyping, creative audit, and validation and testing.

IX technology services segments

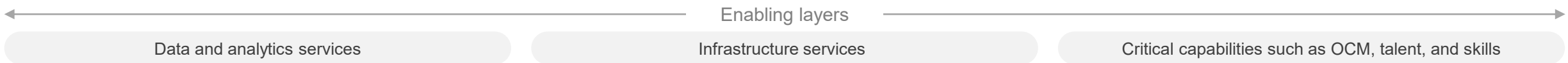
Content services	Data-driven marketing	Commerce services	Campaigns, promotions, loyalty	Media services
<ul style="list-style-type: none"> • Content generation • Content optimization • Content management • Content analytics 	<ul style="list-style-type: none"> • Segmentation and personalization • Marketing attribution • Marketing automation • Predictive analytics 	<ul style="list-style-type: none"> • Business-to-consumer (B2C) and Business-to-business (B2B) commerce • Social commerce • Emerging commerce constructs 	<ul style="list-style-type: none"> • Campaign execution • Promotions management • Loyalty programs 	<ul style="list-style-type: none"> • Channel selection • Channel optimization • Media planning and buying • Media measurement

Platform services

Platform services include implementation, migration, and upgrade of digital experience platforms, Customer Relationship Management (CRM) platforms, customer data platforms (CDP), hyper-personalization engines, AdTech platforms, commerce platforms, design management systems, conversational marketing platforms, workflow automation solutions, and social media marketing/listening tools across above mentioned technology services.

Product development

Digital product development includes user experience-driven application development aligned to existing, new, or disruptive business models. Services include agile development, testing, and DevSecOps to rapidly build and scale minimum viable products (MVP).



The report includes detailed profiles of 21 Digital Interactive Experience (IX) services – Europe providers

Digital Interactive Experience (IX) Services – Europe Provider Compendium 2023

Provider 1 profile (page 1 of 4)

Overview

Vision for DIX services
 Provider 1's vision is to support its clients in delivering digital experiences for customers and society that drive business growth and value.

Percentage of projects in the European region

Region	Low (<15%)	Medium (15-30%)
Nordics ¹	Low (<15%)	Medium (15-30%)
Benelux ¹	Low (<15%)	Medium (15-30%)
GAS ¹	Low (<15%)	Medium (15-30%)
UKI	Low (<15%)	Medium (15-30%)

Delivery footprint

Footprint	Very Low (<10%)	Low (10-30%)	Medium (30-50%)
Onshore ²	Very Low (<10%)	Low (10-30%)	Medium (30-50%)
Offshore ³	Very Low (<10%)	Low (10-30%)	Medium (30-50%)

1 Nordics – Norway, Sweden, Finland, and Denmark; Benelux – Belgium, Netherlands, and Luxembourg
 2 Onshore – The Nordics, Benelux, SE, and GAS
 3 Offshore – India, The Philippines

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Digital Interactive Experience (IX) Services – Europe Provider Compendium 2023

Provider 1 profile (page 2 of 4)

Case study

Case study 1 Enriched the B2B CX for an OEM

Business challenge
 The client wanted to bridge the gap in its digital experience, as its small customers were not able to order via direct Electronic Data Interchange (EDI) connections, but the client had to order via customer service agents.

Solution
 Deloitte Digital selected SAP Commerce Cloud as the technology platform to tightly integrate SAP ERP. A product catalog and packing logic had to be implemented to enhance the customer experience. An integrated team to design, build, test and successfully deploy the platform was established.

Impact
 It improved the user experience for end customers as they no longer had to rely on service agents.

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Provider 1 profile (page 3 of 4)

Solutions and Investments

Proprietary solutions (representative list)

Product	Details
Solution 1	This solution is a campaign analytics platform that helps clients optimize their marketing spend.
Solution 2	This solution is a cloud-based lifecycle marketing platform that helps clients manage their customer relationships.
Solution 3	This solution accelerates client projects and integrates with their existing systems.
Solution 4	This solution facilitates businesses to implement digital transformation and business processes with IoT.

Key investments (representative list)

Investment theme	Details
Acquisition	Its investment at the parent brand level in terms of M&A.
Partnerships	<ul style="list-style-type: none"> It has further enhanced its play in the creative services space. Partnered with partner 2, a customer-led marketing agency. Partnered with partner 3 to enable clients to access new markets. Joined the MACH Alliance to develop MACH solutions.
Talent	<ul style="list-style-type: none"> It is taking strategic steps of hiring senior level talent to drive growth. Launched a work/life restoration program to attract and retain talent affected by the war.

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Digital Interactive Experience (IX) Services – Europe Provider Compendium 2023

Provider 1 profile (page 4 of 4)

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	Innovation & investments	Delivery footprint	Overall
●	●	●	●	●	●	●	●	●

Strengths

- Provider 1 enjoys a significant presence in the Europe region with a primary focus on UK&I and DACH region
- It also continues to enhance its onshore presence for its European clients with the opening of its new delivery center
- It is placing strong bets concerning its leadership talent strategy for expansion in the European market in the creative services space
- Its prowess in the interactive experience space, particularly in digital commerce, has earned it numerous partner awards and analyst recognitions
- Taking the European demand for sustainability-led engagements into consideration, it continues to make significant investments in terms of in-house solutions and acquisitions of companies such as acquired company 1, a London-based climate change strategy consultancy

Limitations

- Its recent rebranding and integration initiatives have led to confusion in the market, with many competitors viewing it as to attack its positioning
- It can further enhance its presence in the Nordics region of Europe
- Potential buyers perceive it as a premium provider but are not fully convinced of the price-value linkage it offers

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Research calendar

Interactive Experience (IX) Services

Published Planned Current release

Reports title	Release date
Customer Data Platform (CDP) Products PEAK Matrix® Assessment 2023	May 2023
Customer Data Platform (CDP) Products Provider Compendium 2023	June 2023
Generative AI – Revolutionizing the Creative Design and Development Process	May 2023
Customer Journey Orchestration : Empowering Personalized CX Across Touchpoints	July 2023
Digital Commerce Platform State of the Market 2023	August 2023
Digital Interactive Experience (IX) Services PEAK Matrix® Assessment – North America 2023	October 2023
Digital Interactive Experience (IX) Services Provider Compendium – North America 2023	November 2023
Digital Interactive Experience (IX) Services PEAK Matrix® Assessment – Europe 2023	November 2023
Digital Experience Platform (DXP) Products PEAK Matrix® Assessment 2023	December 2023
Digital Experience Platform (DXP) Products Provider Compendium 2023	December 2023
Content Supply Chain – Revolutionizing the Content Development Lifecycle	December 2023
Digital Interactive Experience (IX) Services Provider Compendium – Europe 2023	December 2023
Voice of Stakeholder (VoS) Compendium Report 2023	Q1 2024
Decoding the MarTech Ecosystem and the Rise of Composability	Q1 2024
Digital Commerce Services Mid-Market PEAK Matrix® Assessment 2024	Q2 2024

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