



# Metaverse Development Platforms

*The tools and infrastructure to create metaverse applications*

2025 CONSTELLATION SHORTLIST

The Constellation ShortList™ presents vendors in different categories of the market relevant to early adopters. In addition, products included in this document meet the threshold criteria for this category as determined by Constellation Research.

This Constellation ShortList of vendors for a market category is compiled through conversations with early adopter clients, independent analysis, and briefings with vendors and partners.

## ABOUT THIS SHORTLIST

Much hype has been made about the metaverse. However, very few organizations have fully grasped the impact the metaverse will have on experiences and engagement for both the consumer world and the enterprise. More than just gaming worlds or hardware devices, the metaverse economy brings new opportunities for brands and enterprises to bring their physical presence and 3D digital presences together in one unified offering to their stakeholders—customers, employees, partners, and suppliers.

Previous efforts in extended reality (for example, AR/MR/VR) have not succeeded in recreating the abstraction of the real world. The process to build metaverse worlds will be incremental, and the challenge behind the metaverse is to create metaverse applications, which has been tedious, time-consuming, and slow so far.

Metaverse development platforms seek to expedite the creation of metaverse applications and worlds. These platforms should provide the building blocks to support multiple use cases. Constellation estimates the overall metaverse economy to be worth a market cap of \$20.7T by 2030.

To be included in the Constellation ShortList, vendors need to support at least one of the universal metaverse use cases, have 200-plus customers, and demonstrate a multiyear track record to operate and grow metaverse solutions. Finally – AI changes literally and practically everything, which for Metaverse development platforms means that AI has to be used to generate experiences, code and operational code artefacts.



## LIKE WHAT YOU SEE?

Consider partnering with Constellation Research on your go-to-market-strategy. Email [ShortList@ConstellationR.com](mailto:ShortList@ConstellationR.com) for more info.

To learn more about Constellation Research Shortlists visit: [www.constellationr.com/ShortList](http://www.constellationr.com/ShortList)

## 9 SOLUTIONS TO KNOW

Constellation evaluates around **40 solutions** categorized in this market. This Constellation ShortList is determined by client inquiries, partner conversations, customer references, vendor selection projects, market share and internal research.

-  **COSTAR GROUP – MATTERPORT DIGITAL TWIN PLATFORM**
-  **DECENTRALAND**
-  **EPIC – UNREAL ENGINE**
-  **GOOGLE – ARCORE / CLOUD XR**
-  **META – META HORIZON**
-  **MICROSOFT - MICROSOFT MESH**
-  **NVIDIA – OMNIVERSE**
-  **THE SANDBOX**
-  **UNITY SOFTWARE**

## THRESHOLD CRITERIA

Constellation considers the following criteria for these solutions:

- Ability to deploy metaverse apps into the common metaverse worlds (see Constellation ShortList “Metaverse Worlds”)
- Support at least three key metaverse constructs out of the box
  - Modeling/virtualization
  - Blockchain/commerce
  - Code logic
  - Real-world map/3D support
  - Resilience/failover
  - Support of popular cloud platforms
- Leverage of AI for code creation, automation and support of metaverses
- At least 20K developers on the platform
- Leveraging AI for experience generation, automation and operation of metaverse offerings.
- Modern training and learning offerings
- A working multiyear track record to operate and grow metaverse solutions
- Functional coverage of at least one metaverse use case from the following list:
  - Collaboration and meetings
  - Recruiting
  - Onboarding
  - Training
  - Internal comms
  - Digital twins
  - Advertising and search
  - Marketing
  - Sales
  - Commerce
  - Customer service and support
  - Live events
  - Gaming

## ABOUT CONSTELLATION RESEARCH

As an award-winning Silicon Valley-based strategic advisory and futurist analyst firm, Constellation Research serves leaders and organizations navigating the challenges of digital strategy, business-model disruption and digital transformation. Constellation works closely with solution providers, partners, C-suite executives, board of directors, and its Constellation Executive Network of buy-side leaders to lead the way in research coverage and advise clients how to achieve valuable business results.

## FREQUENCY OF EVALUATION

Each Constellation ShortList is updated at least once per year. Updates may occur after six months if deemed necessary.

## EVALUATION SERVICES

Constellation clients can work with the analyst and the research team to conduct a more thorough discussion of this ShortList. Constellation can also provide guidance in vendor selection and contract negotiation.

## BUSINESS THEMES



Technology Optimization



Future of Work



Marketing Transformation



New C-Suite



### R “Ray” Wang Founder & Principal Analyst

R “Ray” Wang provides insight into how disruptive technologies and new business models—such as digital transformation— impact brands, enterprises and organizations. He also focuses on harnessing innovation, creating next-generation business and IT leadership, and applying the new rules of business. Wang has held executive roles in product, marketing, strategy and consulting at companies including Forrester Research, Oracle, PeopleSoft, Deloitte, Ernst & Young and Johns Hopkins Hospital.



### Holger Mueller VP & Principal Analyst

Holger Mueller focuses on the synergies between people and software. As the hand-to-machine ratio radical-ly changes over the next decade (primary factors: age dynamics and technology innovation), enterprises need to find the appropriate balance between changes in a dynamic workforce and the creation and adoption of next-generation applications, all determining the Future of Work and helping enterprises accelerate. Mueller provides strategy and counsel for key clients, including CTOs, CHROs and CIOs as well as investment analysts, VCs, PE firms and technology buyers.

