

# 2020 Market Analysis Results

## *CIMdata PLM Market & Industry Forum*

### 2020 Market Analysis Results

PLM Market & Industry Forum

A CIMdata PLM Leadership Event

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Global Leaders in PLM Consulting  
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### Our Mission...

*Strategic management consulting for competitive advantage in global markets*

**CIMdata is the leading independent global strategic management consulting and research authority focused exclusively on PLM and the digital transformation it enables.**

**We are dedicated to maximizing our clients' ability to design, deliver, and support innovative products and services through the application of PLM.**

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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### Purpose of this Presentation

*A CIMdata disclaimer*

- Deliver an overview of CIMdata's analysis of the PLM market for calendar year 2019
- Present our estimates of direct provider revenues by various categories
- Provide insight into investment changes, trends and market leaders
- Obtain provider input as to the PLM analytics they would like CIMdata to develop
- A detailed analysis of this research will be provided in CIMdata's 2020 PLM Market Analysis Report series
- All information represent CIMdata's estimates of revenues and investments

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### Important Notes

*How CIMdata prepares the global MAR data*

- CIMdata's estimates are for calendar year 2020 and may differ from a provider's fiscal year reported financials
- The relative strength of different currencies can impact growth estimates – all estimates are based on the yearly average for conversion of a currency to US dollars
- All estimates are net of royalties to eliminate any double counting of revenues
  - The royalty paid by a reseller is deducted from their revenue estimate and included within the direct revenues of the appropriate provider's estimate
- There are many acquisitions in some segments that could affect some numbers in 2019
  - We will note those during the presentation

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### Research Methodology Overview

*How CIMdata gathers PLM market data each year*

- Gather data through multiple means
  - Nearly 550 companies get survey workbooks via email
    - Repeated reminders increase response rate
  - Approximately 30 of the world's largest PLM companies interviewed each year
    - Often multiple times to get more insights
  - Separate research conducted in China and Japan
  - Public reporting and other market research used for data collection and cross-check, e.g., Electronic System Design Alliance (formerly EDA Consortium)
  - CIMdata global contacts used as "sanity checks" on anomalous inputs
- Total of approximately 700 companies "touched" by CIMdata process



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### Currency Fluctuations Important

*More balanced than recent years*

Currency	2018	2019	YoY Change
Euro To US Dollar	1.18063	1.1198	-5.43%
Pound To US Dollar	1.333	1.287	-3.57%
Japanese Yen To US Dollar	0.0090549	0.00891	-1.63%
Swiss Franc To US Dollar	1.0225	1.015	-0.74%
Chinese Yuan To US Dollar	0.15673	0.148	-5.90%
Korean Won To US Dollar	0.0008929	0.000884	-1.01%
Swedish Krona To US Dollar	0.115	0.10575	-8.75%
Brazilian Real To US Dollar	0.227739	0.25354	10.18%
Indian Rupee To US Dollar	0.014669	0.0142	-3.30%
Australian Dollar To US Dollar	0.72046	0.6949	-3.68%
Norwegian Krone To US Dollar	0.12118	0.11364	-6.63%



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### Acquisitions in 2019

*Some big, many tuck-ins but still at a high rate (1 of 5)*

- Autodesk acquired BuildingConnected, digital construction network now at core of the Autodesk Construction Cloud
- CONTACT adds ISKO engineers AG (V&V)
- Dassault Systèmes adds elecworks (ECAD) and Medidata
- PTC acquired Onshape
- SAP acquired Qualtrics (XM)
- Siemens Digital Industries Software (4) adds Saab Medav Technologies GmbH (NVH), Atlas 3D (DMLS), MultiMechanics (FEM), ESTEQ (Safr VAR)

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### Acquisitions in 2019

*Some big, many tuck-ins but still at a high rate (2 of 5)*

- Lectra adds Retviews (fashion benchmarking)
- OpenText acquires Carbonite (cloud data mgmt)
- PROSTEP bought out Bartscher & Hasenäcker Consulting GmbH (PLM in EDA/ALM)
- Cadence acquired AWR Corporation (hi-freq RF)
- Synopsys added Qtronic GmbH (auto sim/test), eSilicon IP, DINI (FPGA boards)
- Zuken bought Vitech Corporation (MBSE)

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### Acquisitions in 2019

*Some big, many tuck-ins but still at a high rate (3 of 5)*

- Accenture still very active (15), emphasis on IoT, analytics/AI (Analytics8, Clarity Insights, Knowledgegent, Pragsis Bidoop), regional focused SIs, bolstering Industry X.0 (Enterprise System Partners, Zielpuls)
- Atos with Idnomic (digital ID), X-PERION AG (energy IT)
- Capgemini added Altran (eng svcs) and KONEXUS Consulting (German energy)
- Cognizant adds Zenith Technologies (IE life sci)
- DXC Technology added Luxoft (dig strat/eng svcs), Bluleader (CX), and Virtual Clarity (IT Cloud)
- HCL added selected IBM products (inc. Notes), new HCL Software division

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### Acquisitions in 2019

*Some big, many tuck-ins but still at a high rate (4 of 5)*

- HPE with MapR (AI/analytics)
- TechMahindra bought stake in Vitaran Electronics and Infotek Software and Systems (RFID)
- Wipro acquired International TechneGroup Incorporated
  
- Altair with SEAM (high-freq NV) and DEM Solutions (bulk matl)
- Ansys (5) with Helic (emag), Granta Design, DfR Solutions (reliability), LSTC (LS-Dyna), Dynardo (PIDO)

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### Acquisitions in 2019

*Some big, many tuck-ins but still at a high rate (5 of 5)*

- AspenTech with Mnuvo (AI/analytics)
- Bentley Systems added SignCAD Systems and Keynetix (UK cloud geo viz)
- Hexagon (5) with Etalon (mfg quality data), AMendate (AM sim), Melown Technologies (landscape viz), Volume Graphics (ind CT), Thermopylae (geosp)
- Rockwell Automation adds Emulate3D (Ind auto sim)
- Schneider Electric adds AutoGrid (AI/ML)
- Trimble added Cityworks (dig asset mgmt), Cansel Survey Equipment and iBase networks (VRS networks – hi accuracy GPS)

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### Changes in Market Sample

*Looking to cover more and more of the overall PLM market*

- None of the acquisitions will affect the overall market results
  - Of course, acquisitions will affect the results of individual companies
  - E.g., Dassault Systèmes acquisition of Medidata added US\$133 million that was not previously part of our PLM definition
  - Compensate for acquisitions by adjusting un-allocated revenues
- Will follow up in next year's process to see if any of the acquisitions are contributing to their PLM business
- Beyond acquisitions, in any given year we may add a number of companies
- For 2019, there were no major additions that affect the reported results

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## CIMdata PLM Market & Industry Forum

### Agenda

2020 CIMdata PLM Market & Industry Forum

- PLM Market Analysis
- Overall cPDM Market Analysis
- PLM Provider Analysis
- Provider Sector Analysis
- Concluding Remarks

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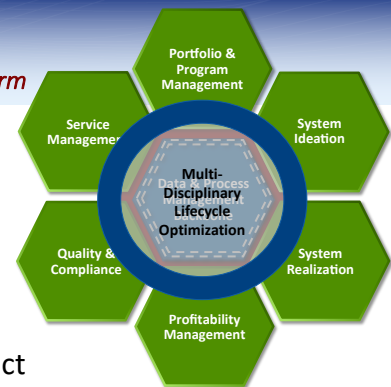
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### PLM – CIMdata's Definition

Digital transformation of the lifecycle—enabled by a product innovation platform

- Strategic business approach
  - **NOT** just technologies
  - Consistent set of business solutions
- Collaborative creation, use, management & dissemination of product related **intellectual assets**
  - All product/plant definition information – the virtual product
    - AEC, MCAD, EDA, ALM, SE, requirements, simulations, analytics, portfolio, formulas...
  - All product/plant process definitions – the virtual processes
    - Processes that plan, design, produce, operate, support, decommission, recycle...
- An innovation platform that supports the extended enterprise
- Spans the full lifecycle, from idea/concept through life



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### PLM Market Categories

*Three major segments comprise the PLM Market*

- collaborative Product Definition management
  - Applications and solutions to capture, manage, disseminate, visualize and collaborate on product related intellectual (digital/virtual) information, including related processes
- Tools
  - Application that are used to create intellectual assets
  - Authoring, analysis, modeling, simulation and documentation of product and plant/facility information
- Digital Manufacturing
  - Process planning, resource definition, factory floor layout and product flow simulation and analysis (including ergonomics)

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### Overall PLM Results

*Growth in 2019*

- Overall PLM growth (7.6%) below forecast (8.9%)
  - All segments grew
  - MCAD-MD struggled
- Autodesk and PTC largely complete their license model transition, will others follow?
- Continued industry consolidation, new entrants, investor interest and action
  - 95 acquisitions in 2015, 74 in 2016, 135 in 2017, 123 in 2018, and 106 in 2019
  - SI/Reseller/VAR the most active segment, led by Accenture (again)
  - Major PLM players trying to differentiate, expand reach

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### 2019 Market Results

Results by segment (US\$ Millions) mostly positive

Segment	2019 Revenues	YoY Growth
cPDM Comprehensive Technology Providers	\$6,656.5	7.3%
cPDM-Focused Applications	\$2,566.3	6.8%
Digital Manufacturing	\$886.5	8.6%
SI/Reseller/VAR	\$8,196.9	7.3%
<b>Tools</b>		
MCAD-Multi Discipline	\$3,927.3	0.7%
MCAD-Design Focused	\$3,515.2	8.6%
Non-Bundled CAM	\$1,565.6	4.5%
Simulation & Analysis	\$7,076.6	9.5%
Other Tools (e.g., ALM)	\$1,669.5	11.2%
EDA	\$10,342.3	4.7%
AEC	\$5,027.6	17.7%
<b>Total</b>	<b>\$51,430.2</b>	<b>7.57%</b>

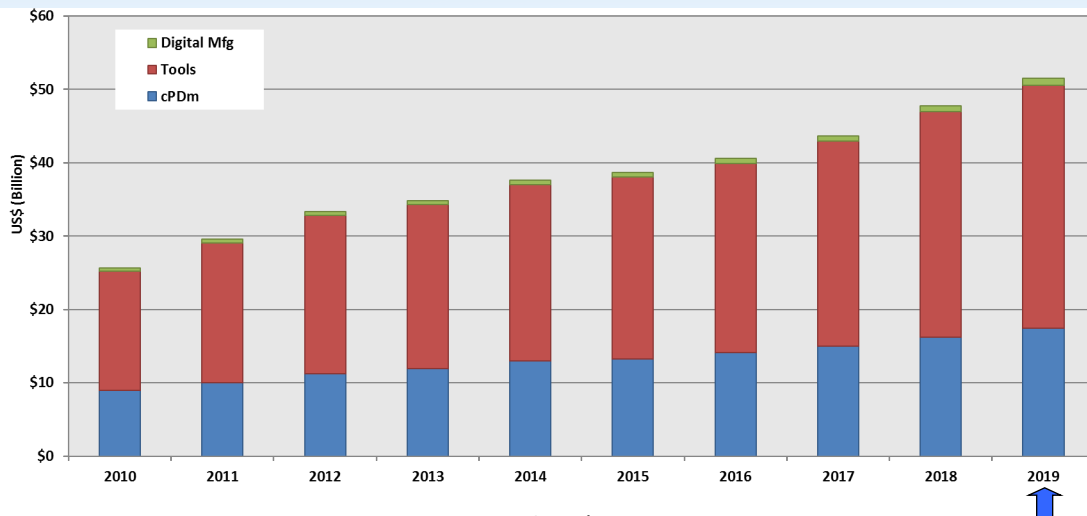
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### PLM Market Investment

Spend increased during 2019



PLM up 7.6% – \$51.4 billion

Revenues presented are CIMdata estimates

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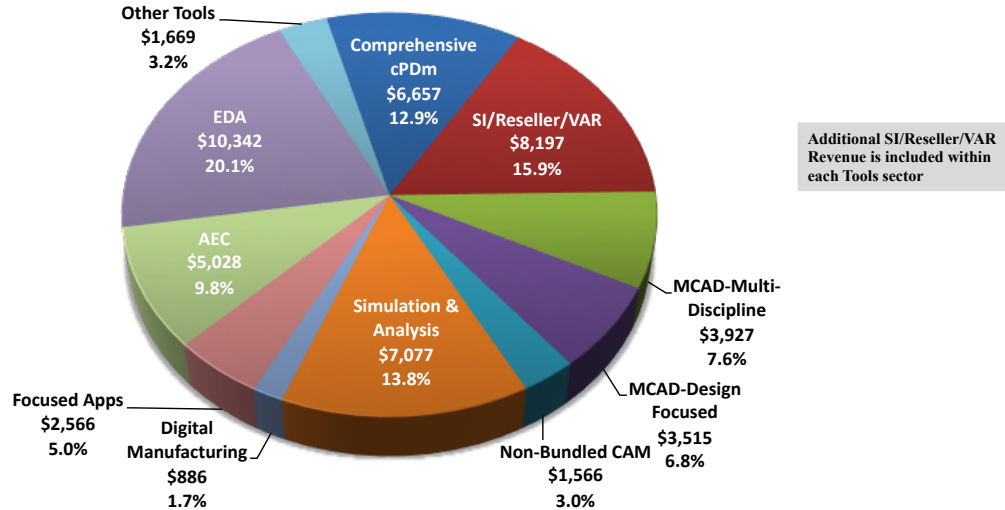
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### PLM Investments by Segment

Market grew by 7.6% to US\$51.4 Billion in 2019



Revenues presented are CIMdata estimates

Estimates are US\$ (Millions)

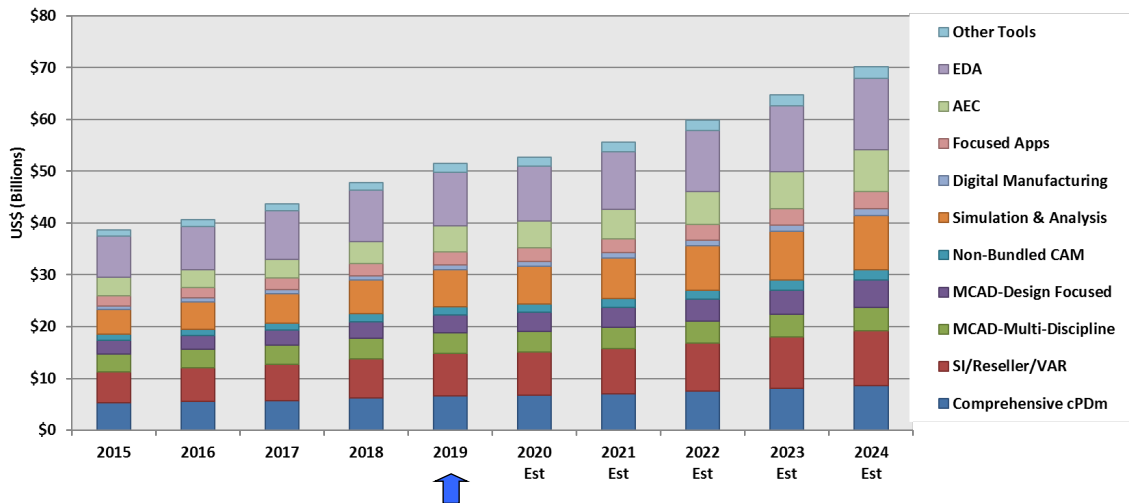


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### PLM Investments

Market history and forecast – software + services



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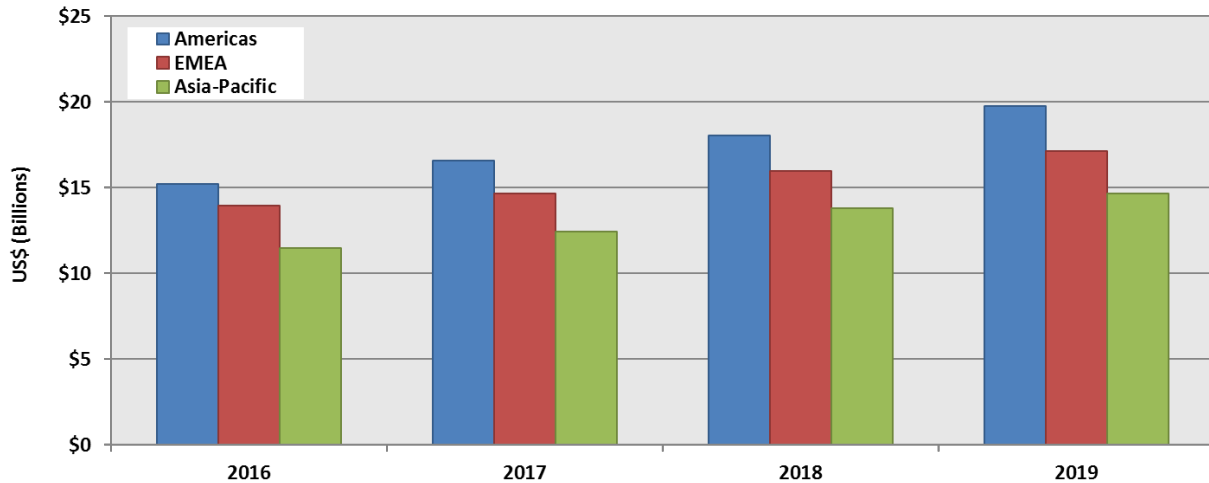
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### PLM Geographic Distribution

*History of investment by geography*



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### PLM Market in 2019

*Big IT changes on-going, global economic growth stopped in its tracks by COVID-19*

- What does 2019 mean for the coming years?
  - While some results were mixed, the outlook was solid
  - COVID-19 is changing everything
  - Business already slowing in Q4, hit a brick wall now
  - Forecast assumes business will resume in the fall, regain strength through 2021
  - Increase in subscription revenue provides a backstop in some segments
- Will COVID-19 slow the growth in M&A in 2020?
- CIMdata believes the market still has a lot of potential

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### PLM Forecast

*Impact of changes to subscription models*

- COVID-19 will have huge impacts over the next 12-18 months
- PLM during the Great Recession, the last major disruption, offers a model
- Considered impacts of market and technology changes since then
  - Move to subscription provides some help to stop the bleeding
  - The cloud helps people work anywhere, anytime, can be an upside as the model takes hold in PLM
  - How face-to-face consulting services might have to change is a big question facing the industry
- How long will it take to get back to normal, or will there be a “new normal”?

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### PLM & the Great Recession

*Solid growth, slowing, reversing, and turning back to growth*

	2004	2005	2006	2007	2008	2009	2010	2011	2012
<b>Comprehensive cPDM</b>	\$ 2,240.2	\$ 2,864.8	\$ 2,804.5	\$ 2,734.4	\$ 3,095.0	\$ 2,958.2	\$ 3,307.6	\$ 4,003.8	\$ 4,566.9
<b>SI/Reseller/VAR</b>	\$ 2,033.3	\$ 2,287.2	\$ 3,294.6	\$ 4,132.7	\$ 4,518.7	\$ 4,208.4	\$ 4,805.0	\$ 4,902.5	\$ 5,179.7
<b>MCAD-Multi-Discipline</b>	\$ 2,718.7	\$ 2,600.4	\$ 2,645.0	\$ 2,872.0	\$ 2,970.0	\$ 2,536.0	\$ 2,554.2	\$ 3,053.4	\$ 3,209.2
<b>MCAD-Design-Focused</b>	\$ 1,563.0	\$ 1,704.8	\$ 1,891.7	\$ 2,045.3	\$ 2,307.0	\$ 1,939.0	\$ 2,108.3	\$ 2,361.0	\$ 2,566.2
<b>CAM Non-bundled</b>	\$ 902.0	\$ 943.2	\$ 1,011.6	\$ 1,081.3	\$ 966.1	\$ 775.0	\$ 883.0	\$ 970.2	\$ 1,045.4
<b>Simulation &amp; Analysis</b>	\$ 1,766.7	\$ 1,805.3	\$ 1,823.6	\$ 2,167.9	\$ 2,340.9	\$ 2,149.0	\$ 2,412.5	\$ 2,974.3	\$ 4,029.1
<b>Digital Manufacturing</b>	\$ 400.0	\$ 403.0	\$ 433.5	\$ 470.0	\$ 511.9	\$ 438.2	\$ 473.8	\$ 498.6	\$ 525.4
<b>Focused Apps</b>	\$ 1,004.5	\$ 947.4	\$ 830.5	\$ 1,010.2	\$ 952.0	\$ 1,079.4	\$ 1,159.7	\$ 1,428.3	\$ 1,553.2
<b>AEC</b>	\$ 1,179.5	\$ 1,355.0	\$ 1,686.4	\$ 2,121.5	\$ 2,319.6	\$ 2,075.7	\$ 2,381.9	\$ 2,664.4	\$ 3,165.8
<b>EDA</b>	\$ 3,801.3	\$ 4,082.2	\$ 4,566.0	\$ 5,029.0	\$ 5,285.0	\$ 4,686.3	\$ 5,112.5	\$ 6,128.5	\$ 6,539.0
<b>Other Tools</b>	\$ 375.0	\$ 550.0	\$ 600.0	\$ 685.0	\$ 725.0	\$ 644.0	\$ 836.5	\$ 931.9	\$ 1,007.8
<b>Total</b>	\$ 17,984.1	\$ 19,543.3	\$ 21,587.4	\$ 24,349.3	\$ 25,991.3	\$ 23,489.1	\$ 26,035.1	\$ 29,916.8	\$ 33,387.5
		<b>8.7%</b>	<b>10.5%</b>	<b>12.8%</b>	<b>6.7%</b>	<b>-9.6%</b>	<b>10.8%</b>	<b>14.9%</b>	<b>11.6%</b>

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### Market Forecasts

For 2020 (US\$ Millions) and 5-year compound annual growth rate (CAGR)

Segment	2020 Estimate	YoY Growth	5 Year CAGR
cPDM Comprehensive Technology Providers	\$6,773.10	1.8%	5.3%
cPDM-Focused Applications	\$2,612.45	1.8%	5.9%
Digital Manufacturing	\$906.43	2.3%	6.7%
SI/Reseller/VAR	\$8,336.21	1.7%	5.3%
Tools			
MCAD-Multi Discipline	\$3,966.62	1.0%	2.8%
MCAD-Design Focused	\$3,641.74	3.6%	8.1%
Non-Bundled CAM	\$1,593.77	1.8%	5.5%
Simulation & Analysis	\$7,274.71	2.8%	8.0%
Other Tools (e.g., ALM)	\$1,719.58	3.0%	6.9%
EDA	\$10,600.84	2.5%	5.8%
AEC	\$5,213.65	3.7%	9.8%
Total	\$52,639.08	2.4%	6.4%

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### Agenda

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- PLM Market Analysis
- Overall cPDM Market Analysis
- PLM Provider Analysis
- Provider Sector Analysis
- Concluding Remarks

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### cPDM Segment of the PLM Market

*cPDM is a core element of a PLM environment*

- Managing intellectual assets
  - Management of product information and processes
    - Workflow, vaulting, content, document management
  - Visualization and collaboration
  - Product structure
  - Configuration and change management
  - Strategic product planning
  - Project and program management
  - Compliance and sourcing
  - Others

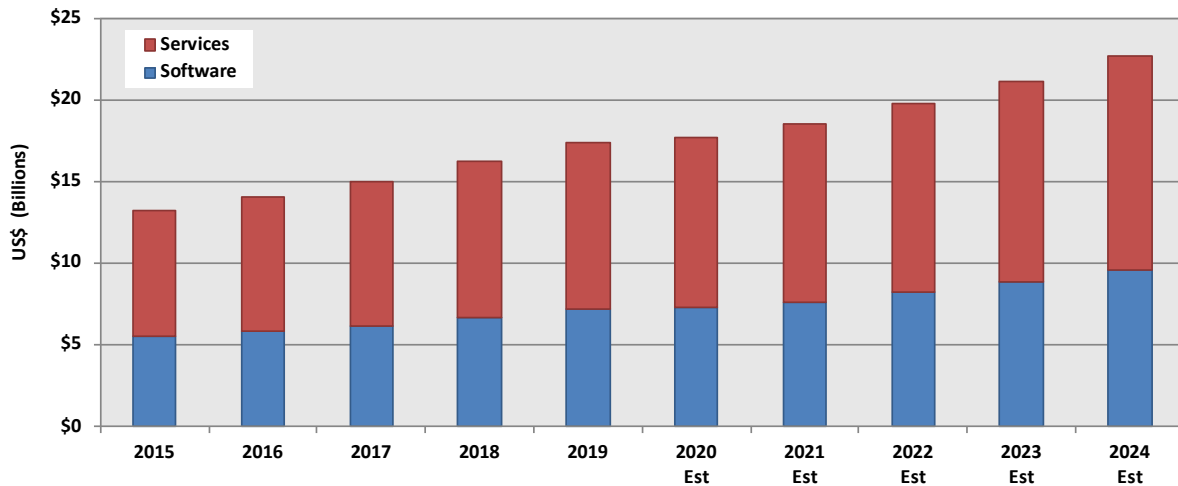


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### 2019 cPDM Revenue Distribution

*Total investment = software + services – Five year CAGR estimate = 5.4%*



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### Revenue Ratios – Software vs. Services

*Services is a major revenue area*

- Overall cPDM market: services are 58.8%
  - Driven by independent services providers
- Comprehensive cPDM providers
  - In 2019, Software was 67.4% vs. 32.6% for Services
  - In 2018, Software was 66.7% vs. 33.3% for Services
- Services ratio can change for several reasons
  - PLM solution providers developing products, packaging, and delivery bundles to reduce services
  - Cloud-based products often claim to require less services
  - Nature of services changing – more need for skills in advanced PLM topics vs. IT installation and integration

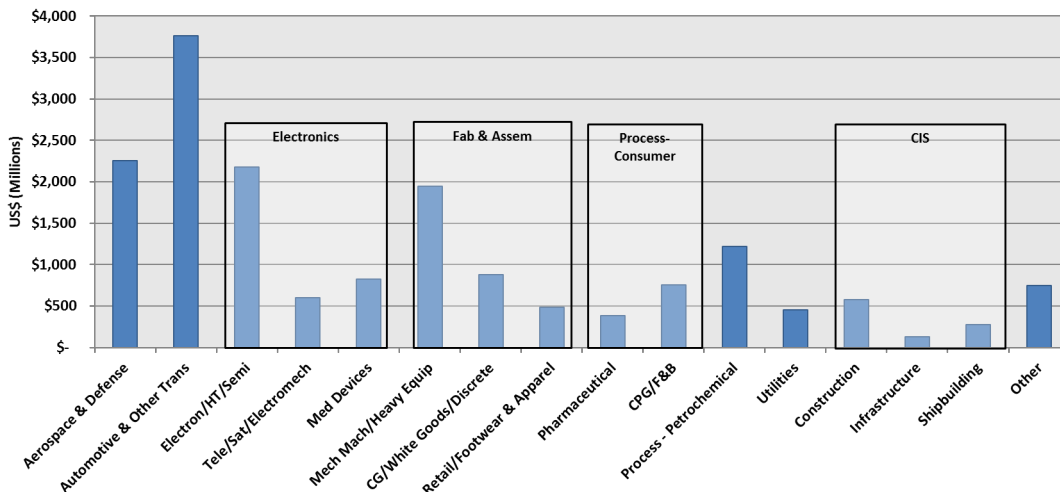


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### cPDM Investment

*Investments by industry—2019*



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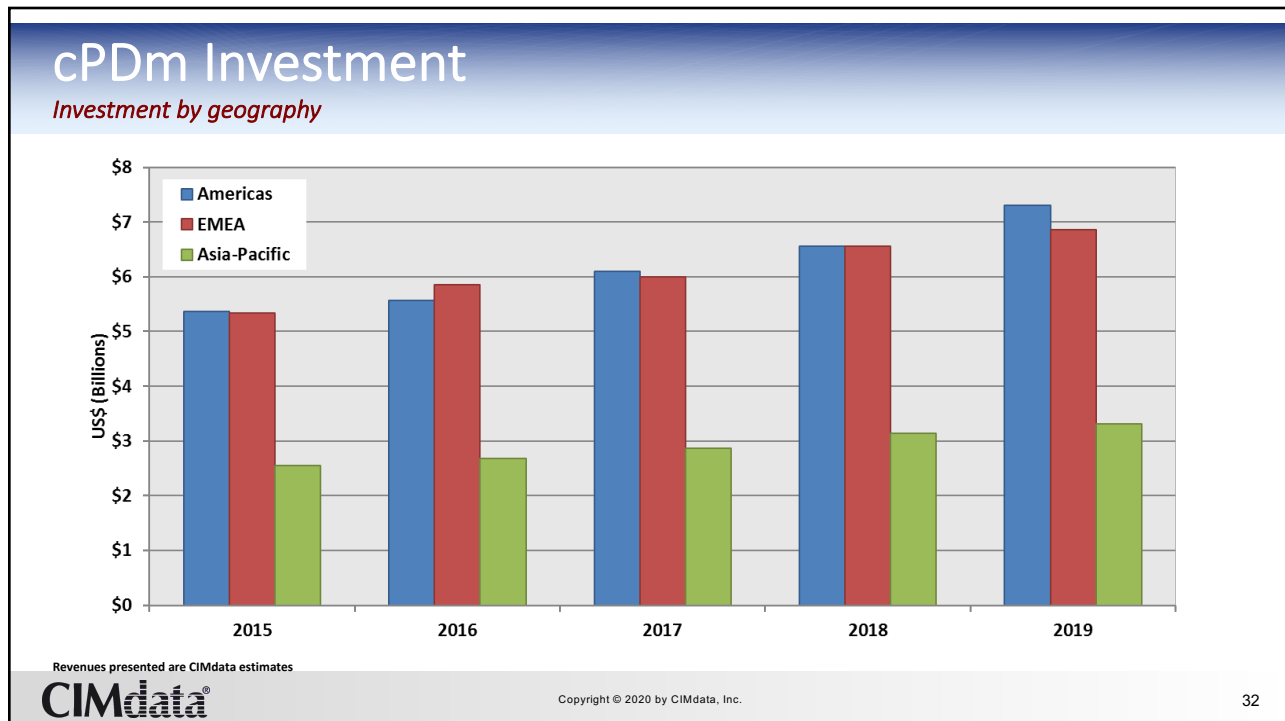
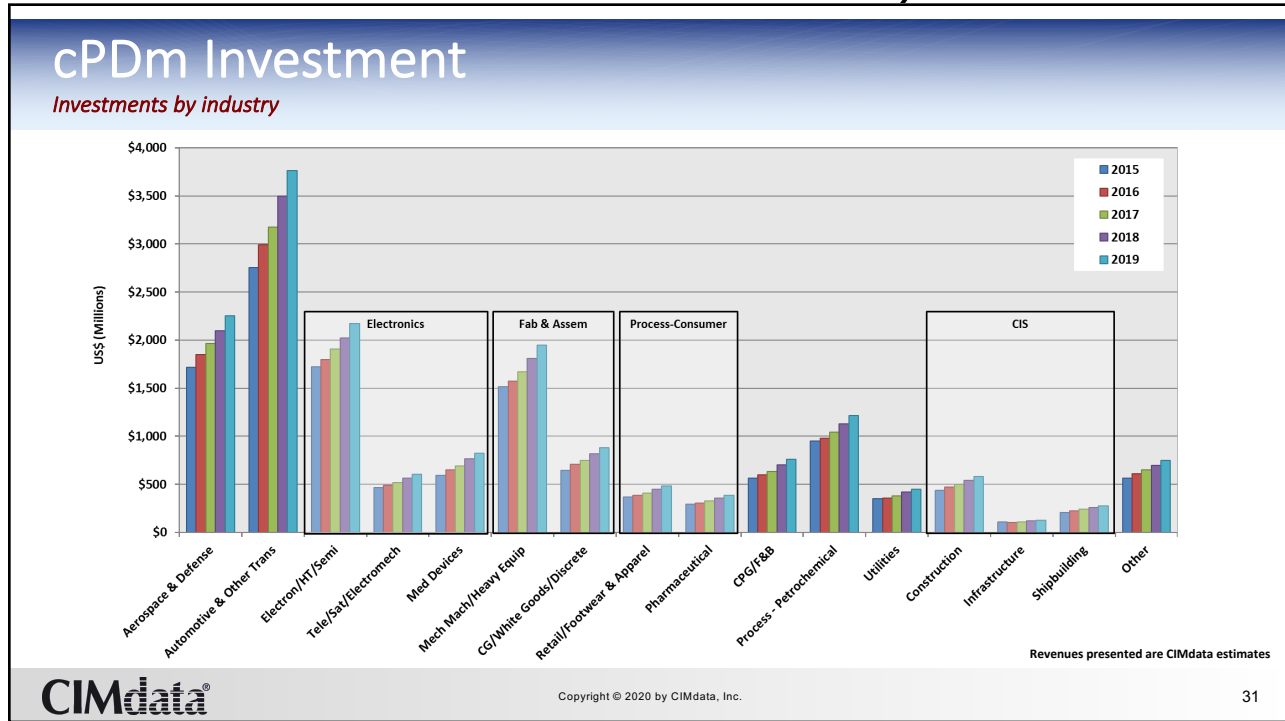
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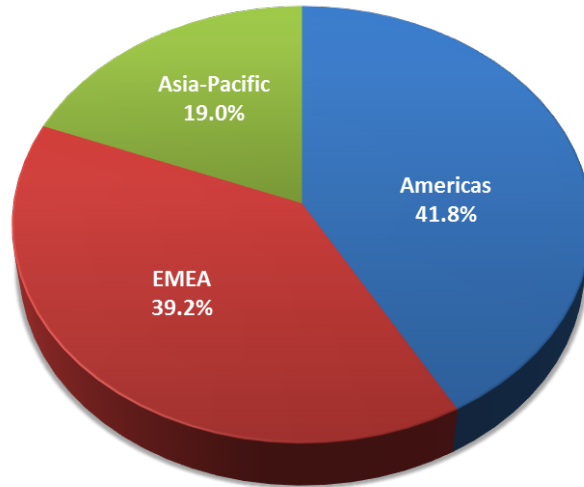


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### 2019 cPDm Geographic Distribution

*Growth in all geographies*



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### PLM Mindshare Leaders

*Who do people think about?*

- These companies are perceived as leading the market
  - Number, size, and scope of implementations
  - Technology and thought leadership
- All are comprehensive, lifecycle-focused providers
  - They were leaders in the PDM market
  - Some also provide tools – primarily MCAD and S&A
- Are developing broad PLM platforms, and addressing new industries and geographies
- Aras pushed its way into the group
  - Disruptive business model
  - Strong results with very large companies, e.g., Airbus, GM

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### Market Presence

*Evaluating a provider's impact in the marketplace*

- Market presence includes
  - A provider's direct revenues
  - Partner revenues built around a provider's products and technology
  - Does not double count royalties paid
- Represents a provider's overall footprint in the PLM market
- Grows with a provider's partnerships and alliances

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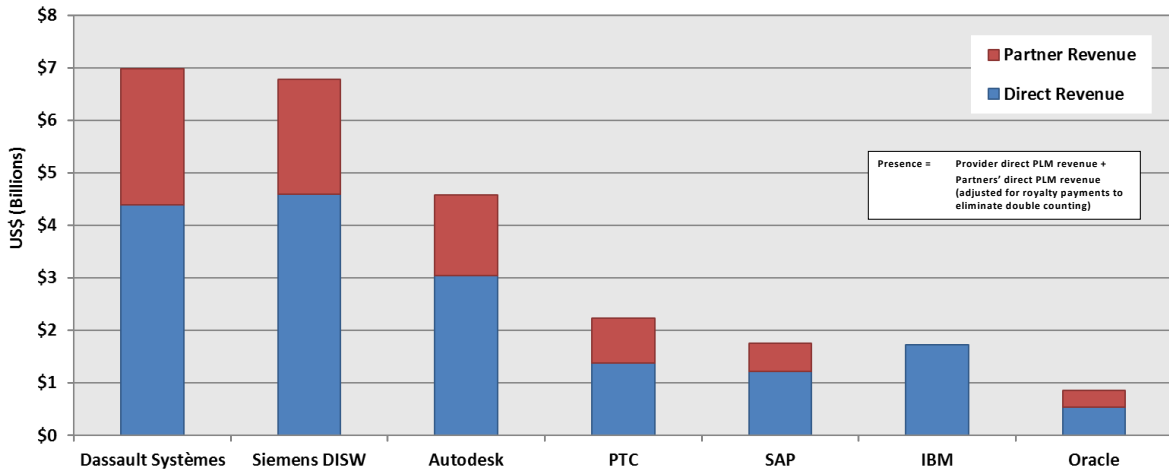
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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### 2019 PLM Mindshare Leaders Presence

PLM leaders' footprints in industry—heavily leveraging partners



Revenues presented are CIMdata estimates

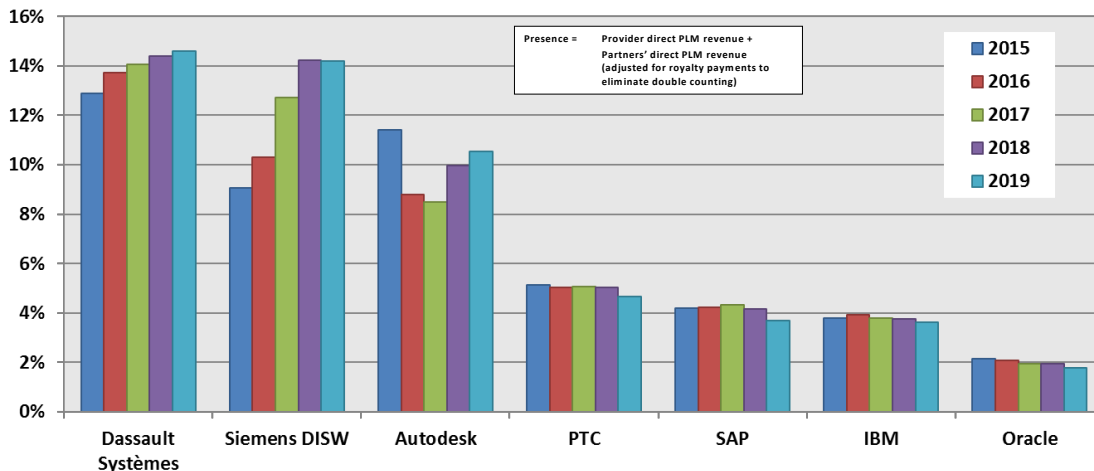


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### PLM Mindshare Leaders Market Share History

PLM mindshare leaders' five-year PLM market presence share trends



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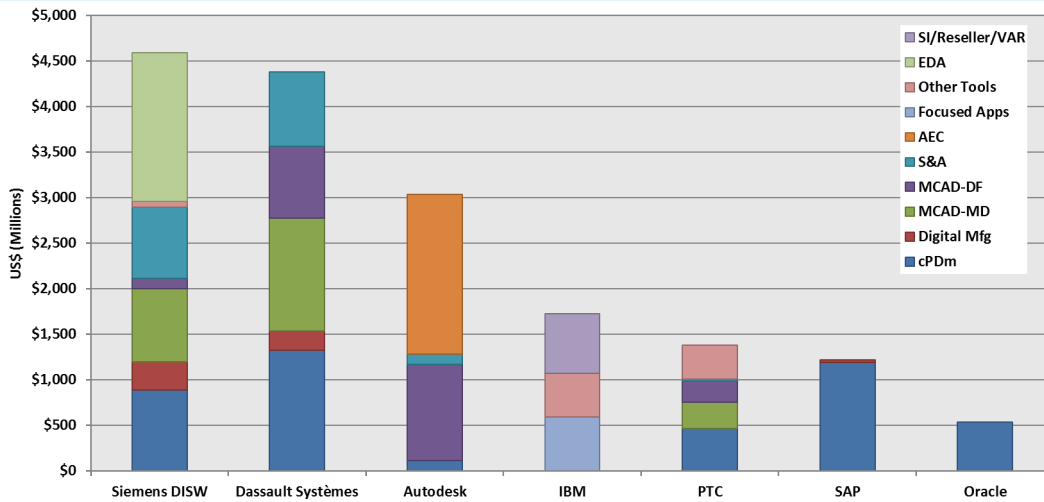
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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### 2019 PLM Leaders Revenue

Leaders' direct revenues—led by providers of CAD tools



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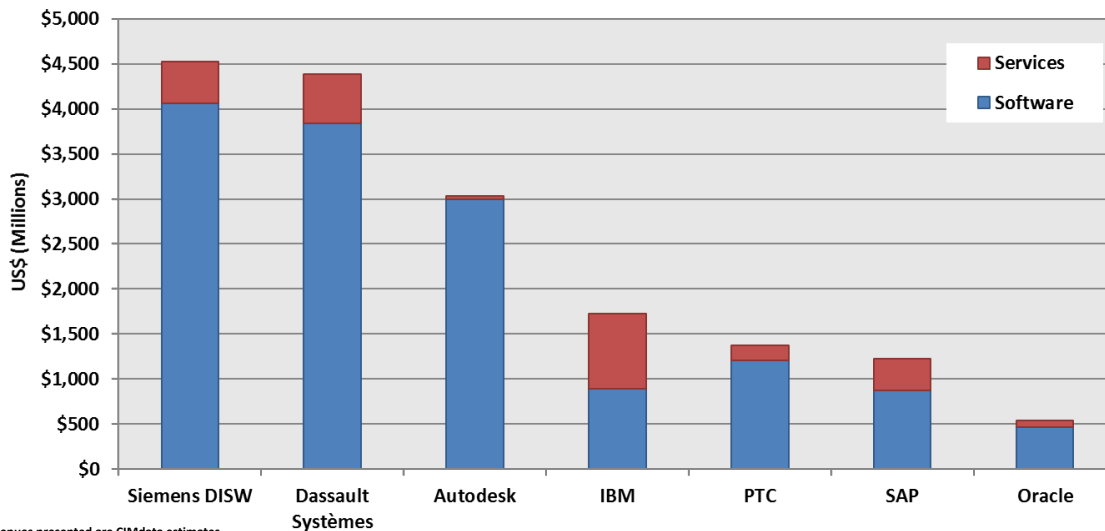


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### 2019 PLM Leaders – Revenue

Leaders' direct revenues—software revenue is the driver



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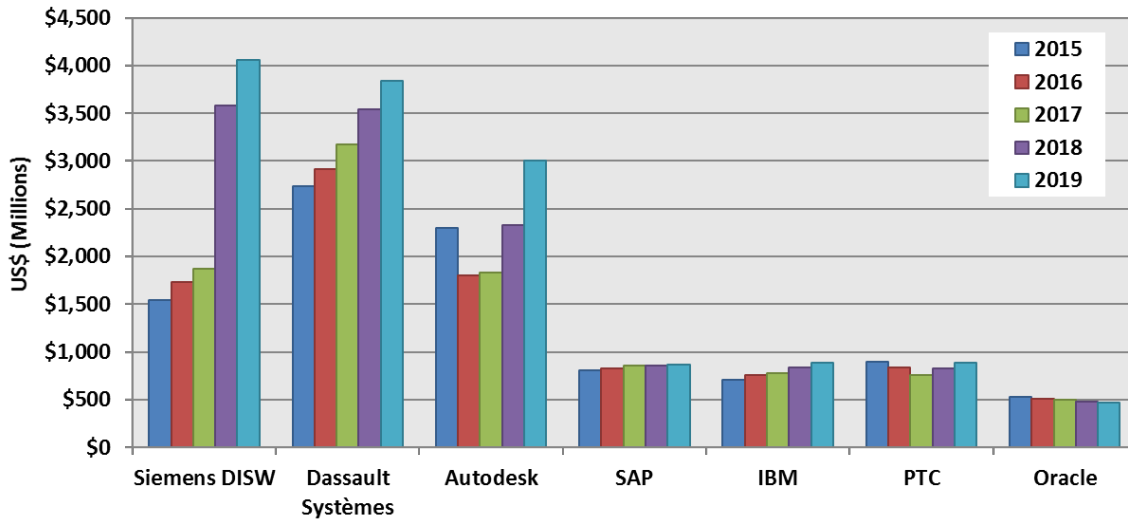
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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### PLM Leaders Software History

Leaders' five-year PLM direct revenue trends – software only



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### Overall PLM Market Revenue Leaders

The market leaders are a diverse group

- Several are focused on specific technologies or industries
  - MDA, EDA, AEC, analysis, ...
- Some have multiple lines of business
- Some are partners of multiple other providers
- Many are not competitors
- Twelve companies over \$1 billion in revenue
  - Two EDA
  - Five Comprehensive cPDM
  - Two SI/Reseller/VAR
  - Two S&A
  - And Hexagon...

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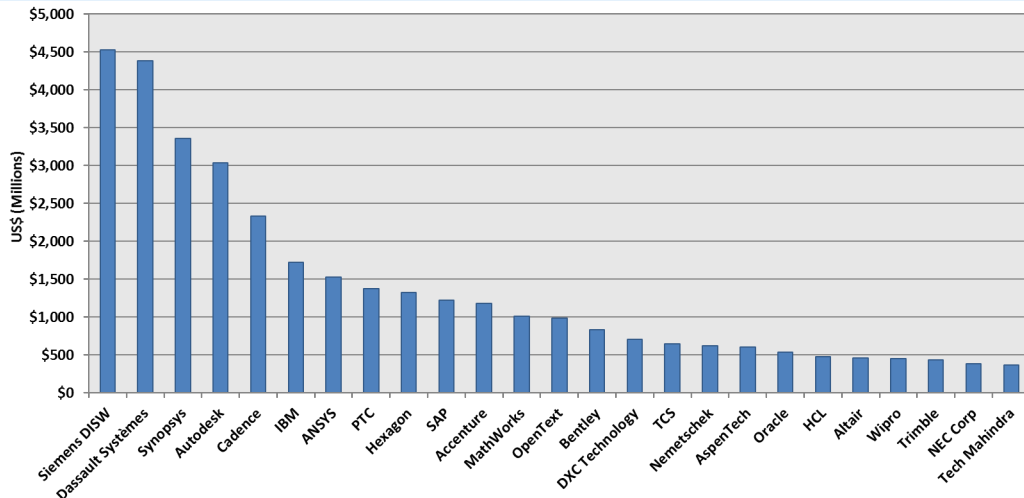
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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### 2019 Overall PLM Revenue Leaders

*Many diverse companies generate PLM revenue*



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### Scope of Services Continues to Evolve

*As PLM solutions evolve, more and different services are needed—even more of a challenge now*

- PLM continues to interface, exchange information and processes with more and more business solutions
  - Expanding footprint requires higher levels of integration
  - PLM expansion areas require deployment skills not normally available in-house – driving use of external expertise
  - Cloud – cloud to cloud, cloud to on-premise interconnection
  - IoT data will have to be analyzed, with results fed back to multiple systems
- Changes to software design, packaging, and delivery changing the types of services needed
  - Going beyond just implementation, IT integration
  - Helping customers to implement advanced topics/processes using a specific cPDM solution
  - Mobile access to multiple systems of record

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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### Service Providers

*Services companies continue to increase PLM commitments*

- Systems integrators and consultancies continuing their PLM program expansion
  - Global firms
    - Accenture, Atos, Capgemini, IBM, T-Systems, CENIT, DXC Technology, Deloitte, Tata Technologies, TCS, HCL, Infosys, Wipro, Tech Mahindra,...
  - Regional/focused SIs continue expanding
    - NEC, Addnode, Samsung SDS,...
- These firms are developing solutions on top of solution provider technology
  - Adding their domain expertise
  - Industry and/or functional solutions
  - Selling through providers or direct to industrial companies

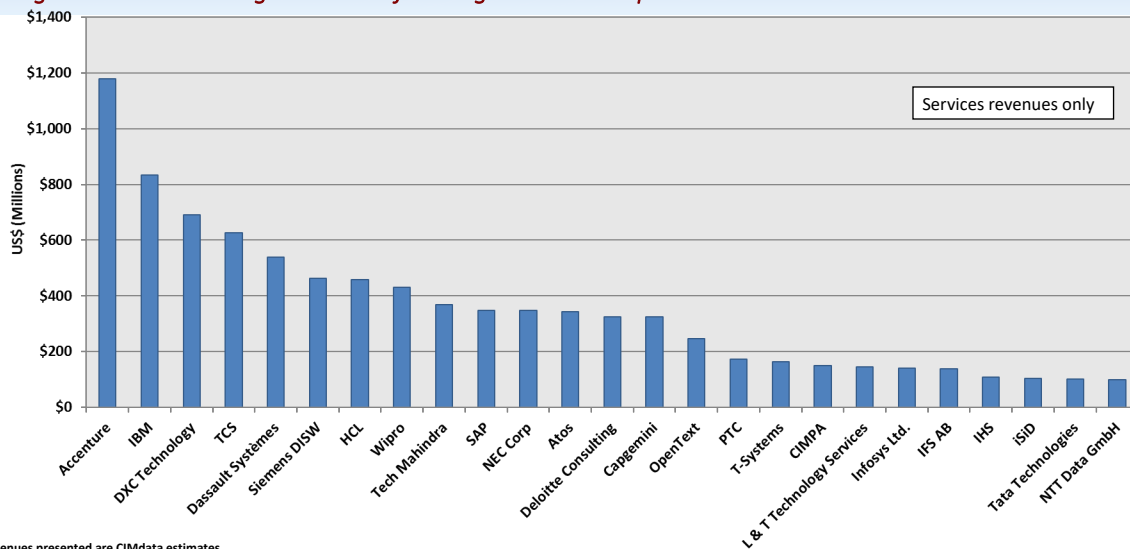


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### 2019 PLM Services Revenue Leaders

*Changes in the services organizations of leading PLM solution providers*



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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### Focused Application Providers

*Expanding PLM through innovation*

- Focused providers help expand the PLM market
  - Target specific market segments
  - Create solutions that complement major providers' suites
  - Introduce new technology and working paradigms into the PLM environments
- Many create technologies and solutions that are acquired or embedded into the comprehensive providers' product suites
- Frequently become acquisition targets
  - E.g., Ansys with Granta Design
- Harder (or impossible) to continue to measure separately post-acquisition

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### Agenda

*2020 CIMdata PLM Market & Industry Forum*

- PLM Market Analysis
- Overall cPDM Market Analysis
- PLM Provider Analysis
- Provider Sector Analysis
- Concluding Remarks

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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### cPDM Provider Analysis

*Review of cPDM provider revenue performance*

- cPDM sector had another solid year
- Comprehensive segment dominated by “mindshare” leaders
  - Dassault Systèmes, Oracle, PTC, SAP, and Siemens DISW
  - Aras pushed their way into the Mindshare Leaders group
- Other major providers
  - Autodesk, IBM, IFS, and Infor
  - NEC focused on Japan
- New providers continue to emerge
  - Continuing the expansion, platforms play a role (Propel PLM/Salesforce)
  - Local providers, i.e., China, Russia, etc.

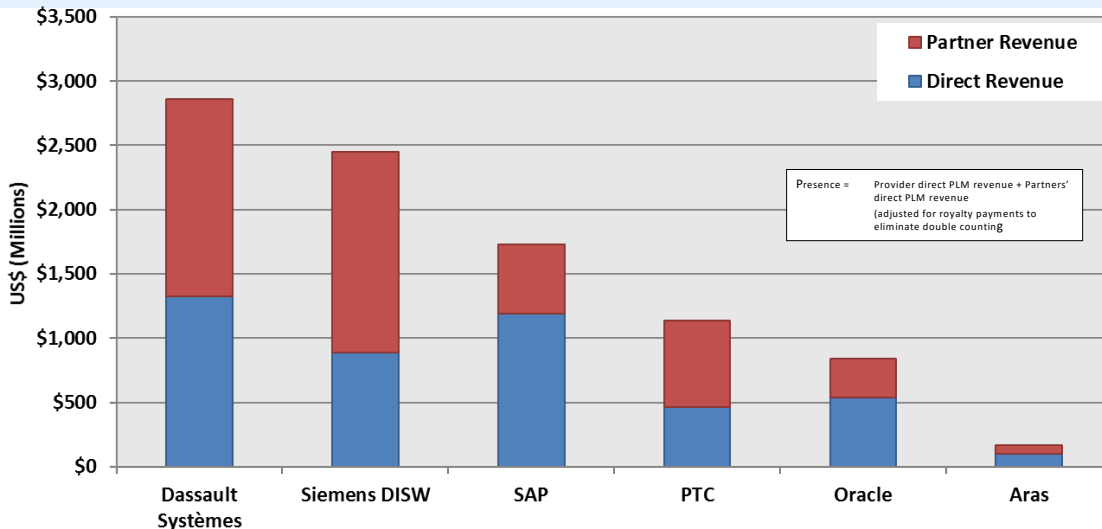


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### 2019 cPDM Leaders Market Presence

*Shows impact on cPDM market sector*



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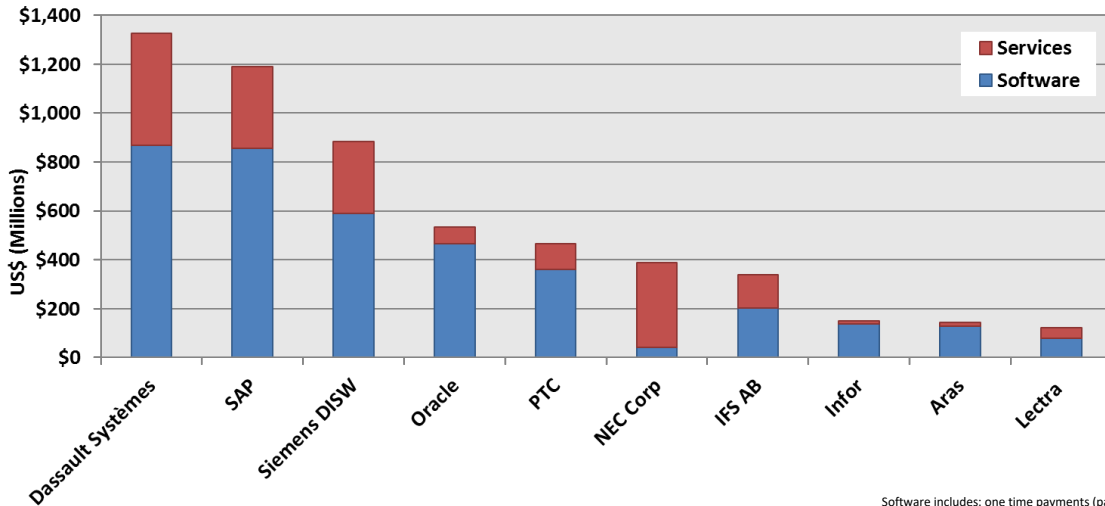
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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### 2019 cPDM Leaders Direct Revenue

Software provides the majority of revenue for most providers



Revenues presented are CIMdata estimates

Software includes: one time payments (paid licenses) plus recurring fees – right to use, subscriptions, maintenance

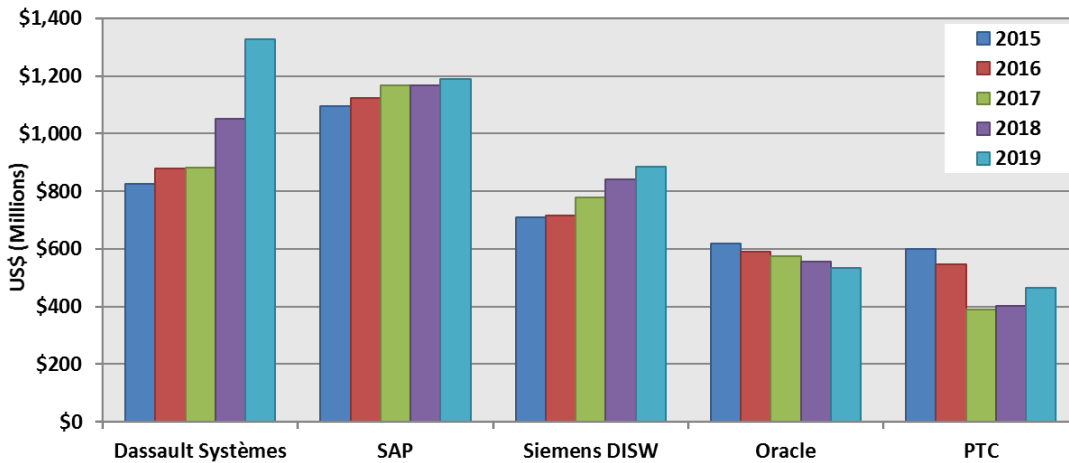


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### Comprehensive cPDM Leaders Revenue History

Leaders' five-year cPDM direct revenue trends



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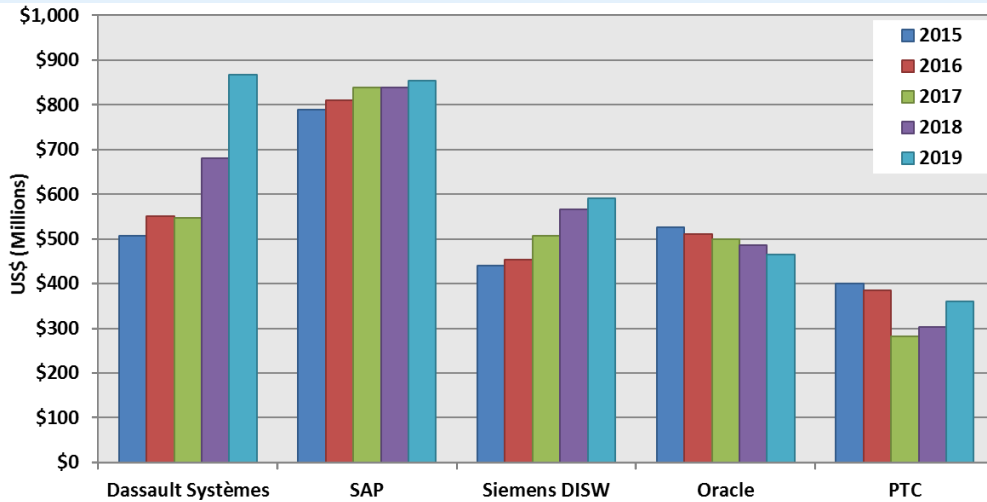
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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### Comprehensive cPDM Leaders S/W History

Leaders' cPDM direct revenue



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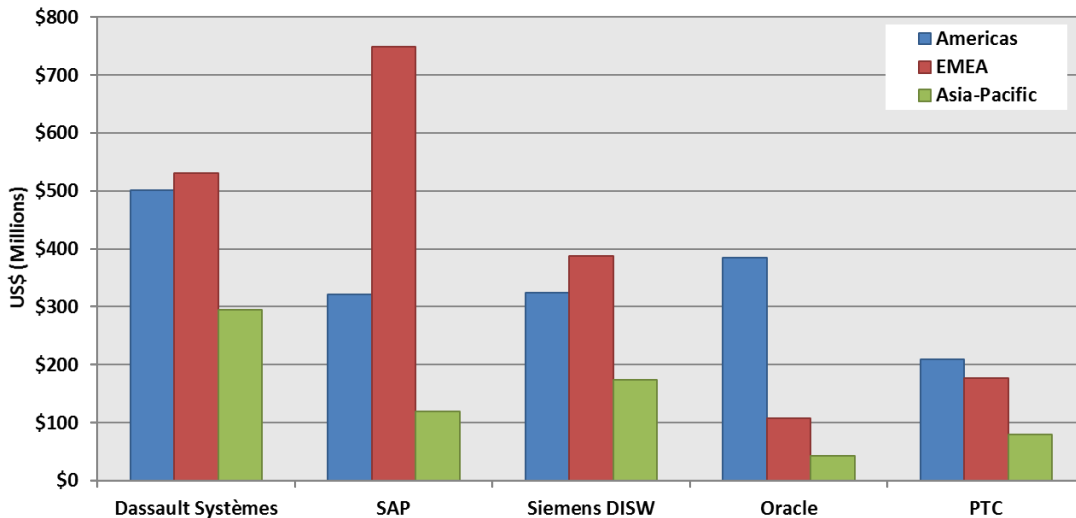


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### 2019 Comprehensive cPDM Providers

Leaders have different regional direct revenues



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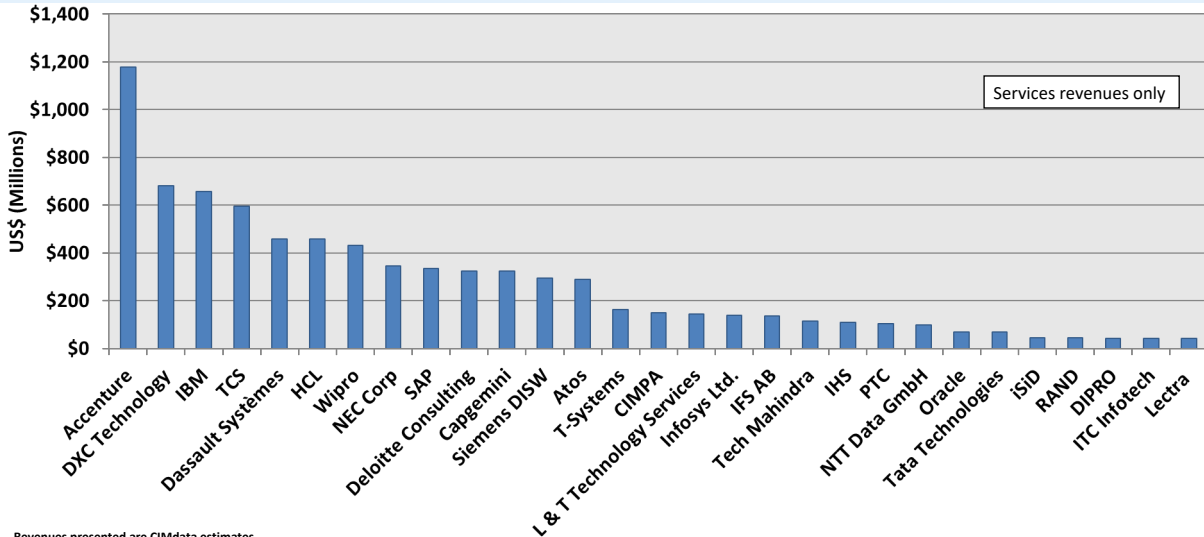
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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### 2019 cPDm Overall Services Leaders

*Comprehensive providers have growing services organizations*



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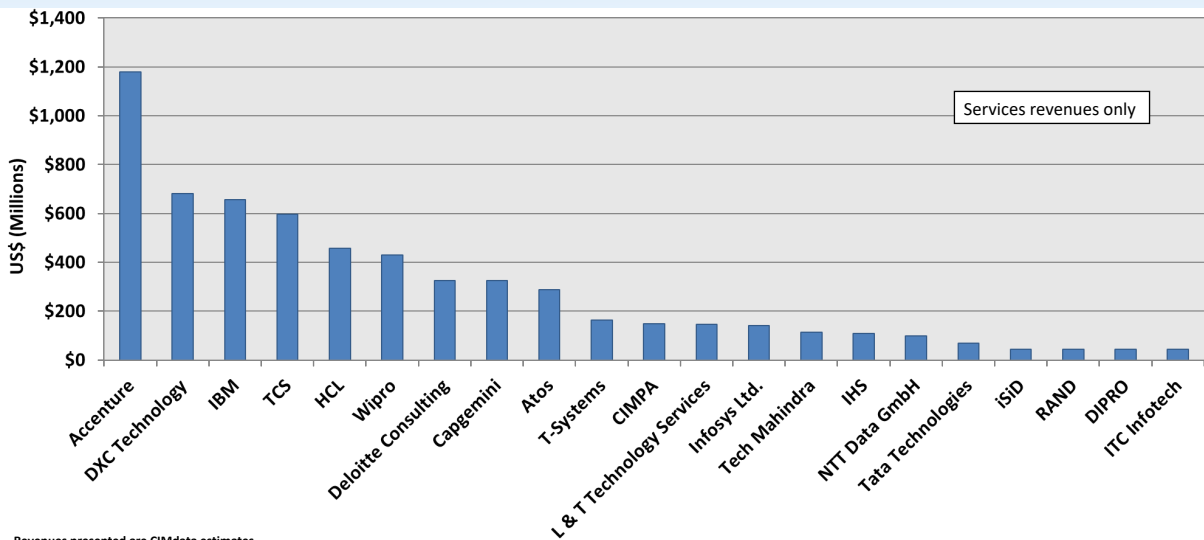


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### 2019 cPDm Independent Services Leaders

*cPDm independent services continue to grow*



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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### Overall cPDM Providers

*Continuing evolution among the overall leaders*

- Leaders are from all cPDM segments
  - These providers do not always compete
  - Some partner on selected accounts
- Service providers continue to grow
  - Expect strong license growth in 2019 to lead to services growth in out years (eventually)
- Thirteen cPDM software and service providers larger than \$400M in 2019, up two from 2018

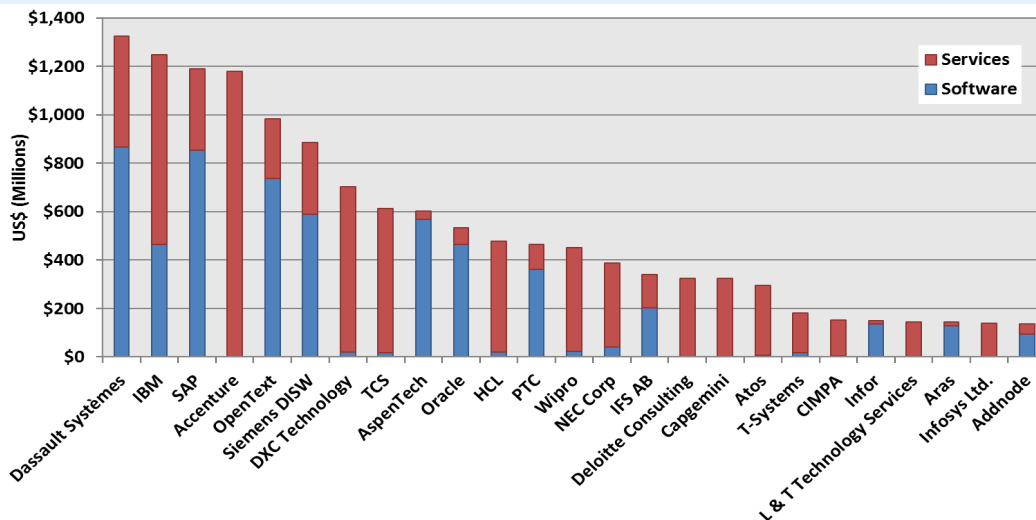


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### Overall 2019 cPDM Revenue Leaders

*Services are a major factor in overall revenue*



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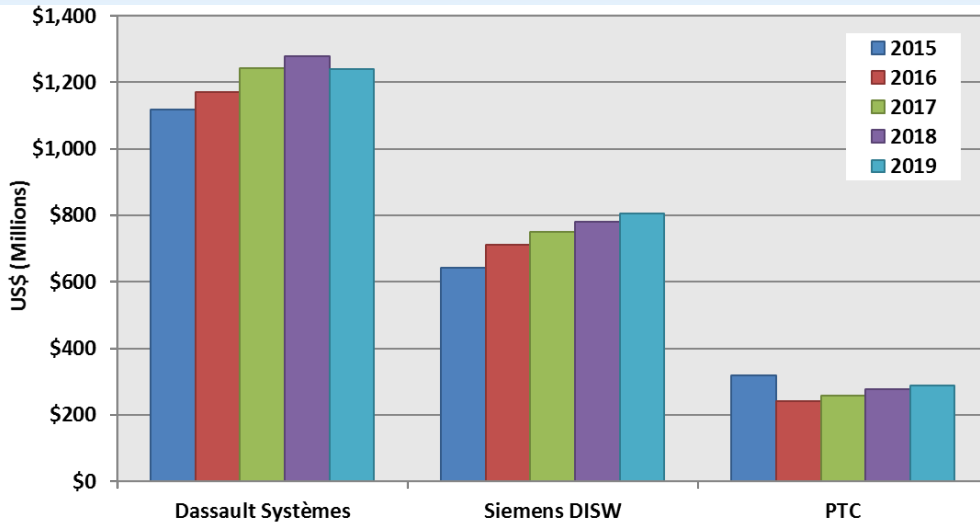


# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### MCAD-Multi-Discipline

Leaders revenue histories



Revenues presented are CIMdata estimates

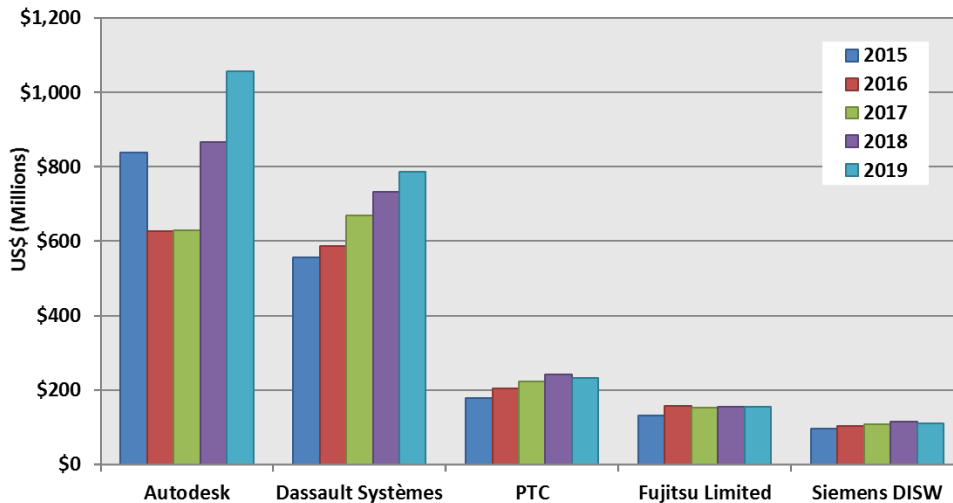


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### MCAD-Design-Focused

Leaders revenue histories



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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### Combining MCADs

*Does it make sense to separate MD and DF?*

- Since CIMdata began reporting “Tools” revenues in the MAR, we used two categories
  - Multi-Discipline (MD)
  - Design-Focused (DF)
- Made sense at the time
  - Different markets
  - Different capabilities
- Times have changed – is it time to change to reporting to MCAD?
  - DF solutions have expanded their capabilities
- Major providers said “it makes sense to combine them, but please report them both ways”

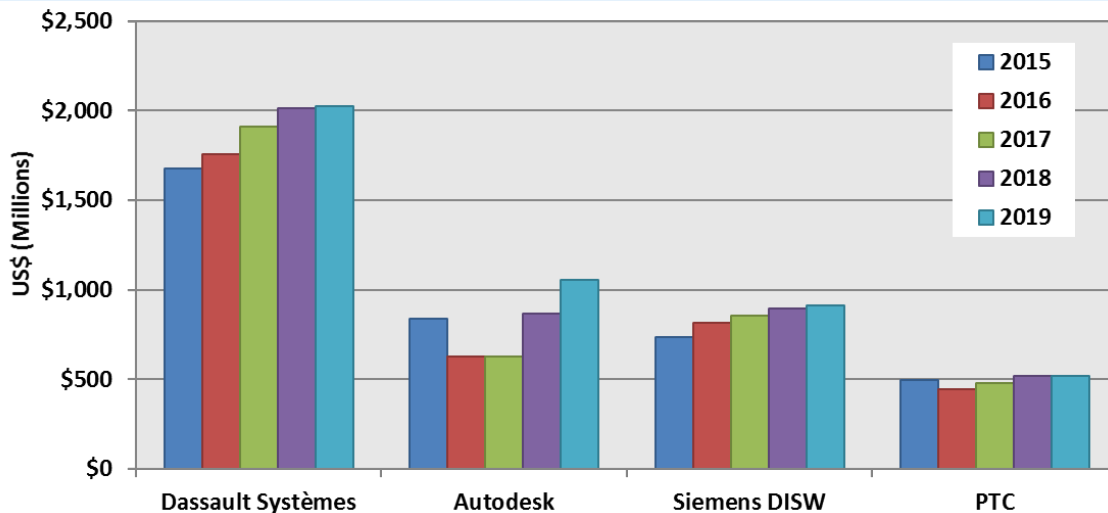


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### Combined MCAD

*Leaders revenue histories*



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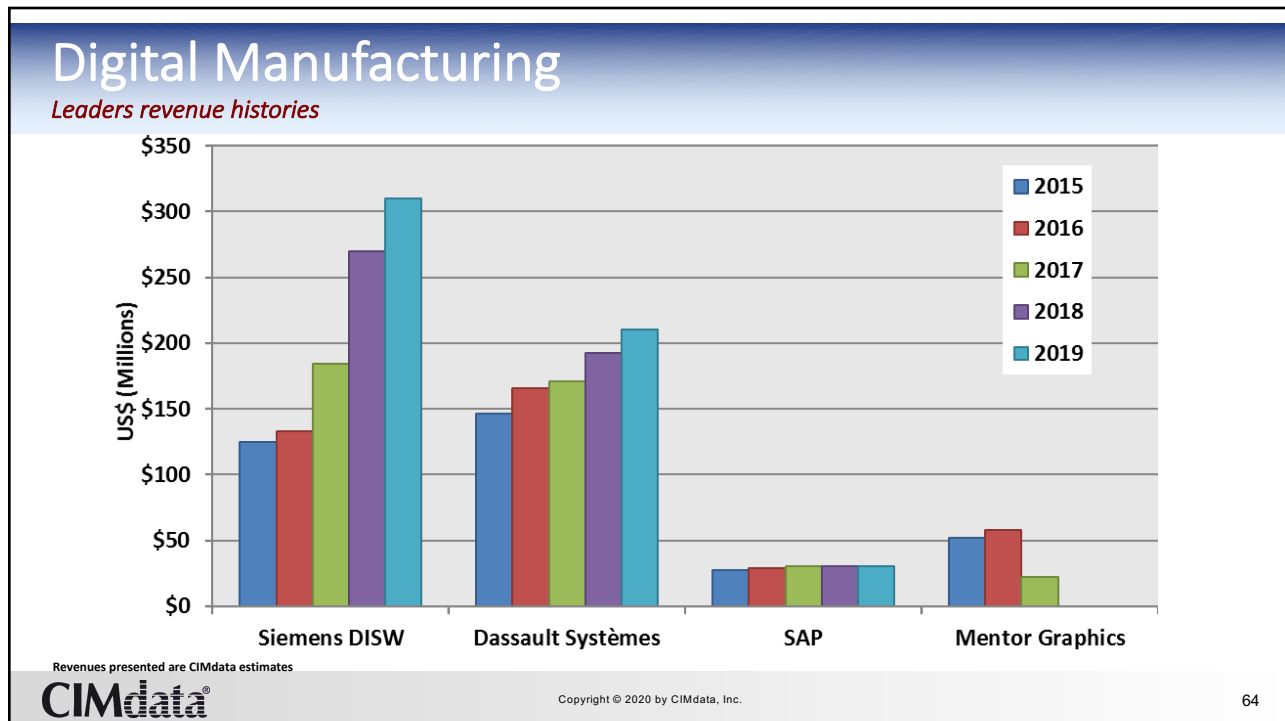
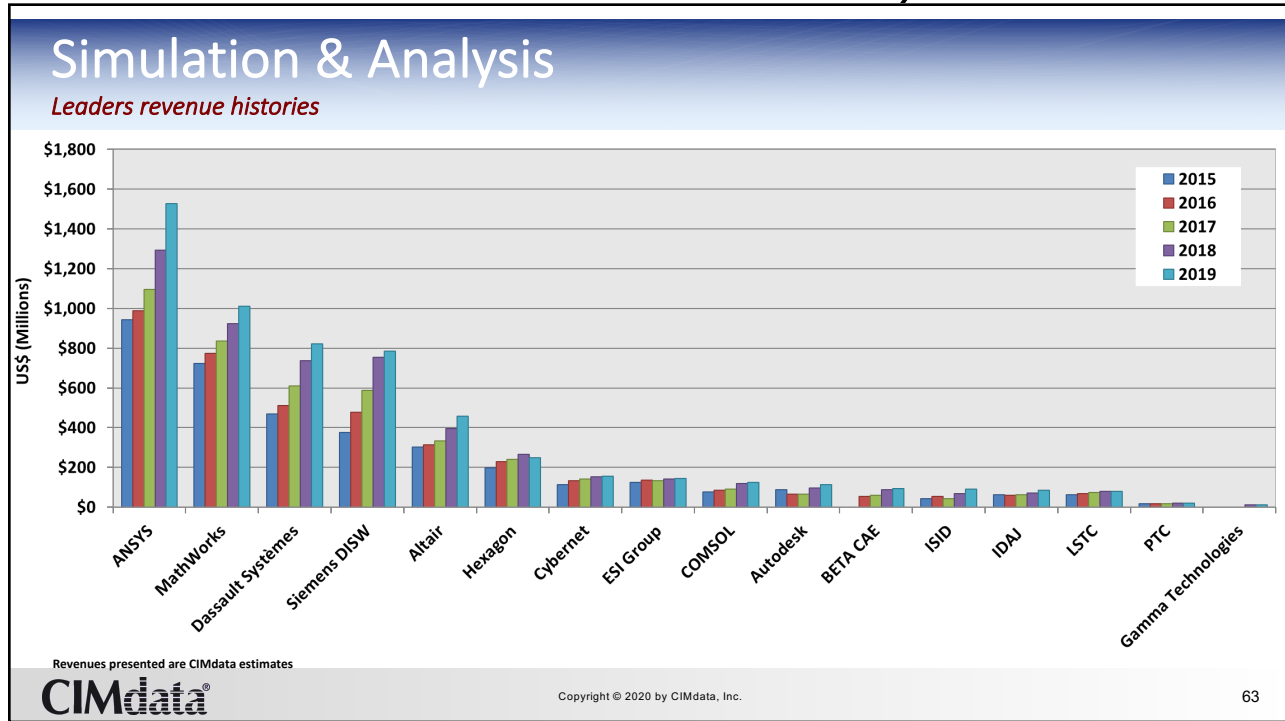
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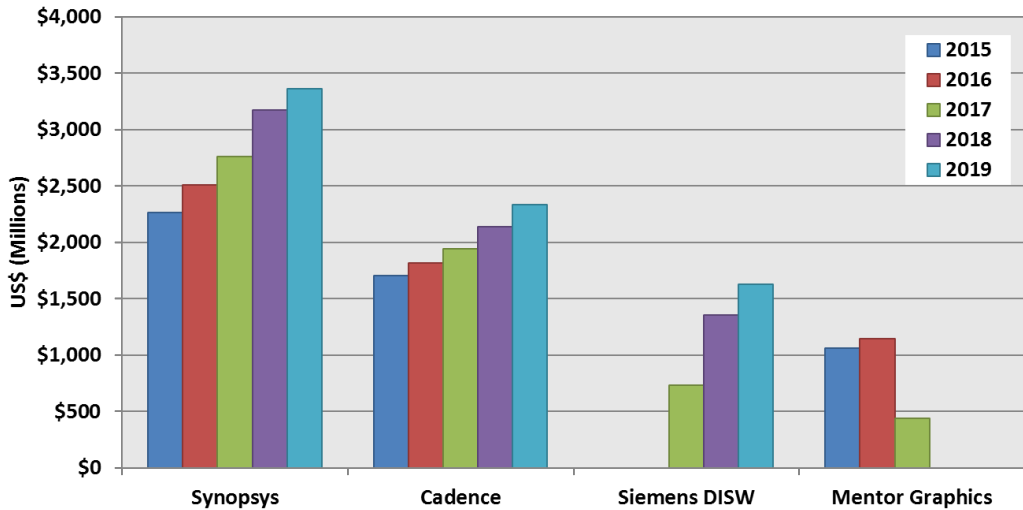


# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### EDA

Leaders revenue histories



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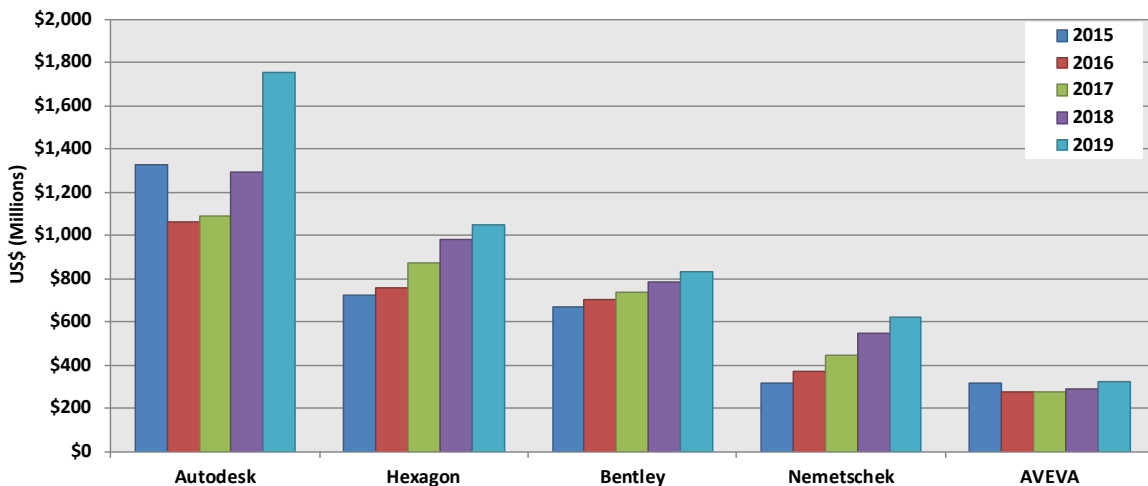
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### AEC

Leaders revenue histories



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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### Agenda

2020 CIMdata PLM Market & Industry Forum

- PLM Market Analysis
- Overall cPDM Market Analysis
- PLM Provider Analysis
- Provider Sector Analysis
- Concluding Remarks

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### Concluding Remarks

Factors impacting the PLM Economy (1 of 2)

- Just under forecast, too optimistic in MCAD segment
- COVID-19 will impact all segments, some potentially in a big way
- Subscription can back stop declines, assuming no defections
- Simulation and systems engineering still key
- Mergers and acquisitions will continue to play a role
  - Providers look to fill out their portfolios
  - An important part of the platformization trend
  - A lot of activity in the SI/Reseller/VAR space

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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### Concluding Remarks

*Factors impacting the PLM Economy (2 of 2)*

- Still waiting for cloud, PTC thinks Onshape will help them transform
- Services continue shrinking as a percentage of the cPDM market
  - Packaged solutions reducing services requirements
  - Cloud will contribute
  - Changes in types of services needed
  - More consolidation to come?
  - Will this crisis create a new normal in service delivery?
- PLM refresh programs will continue, as suggested in recent CIMdata research

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### The CIMdata PLM Market Analysis Report

*Major PLM Foresight deliverables, a growing MAR series*



- CIMdata PLM Market Analysis Report
  - CIMdata Executive PLM Market Report
  - CIMdata PLM Industry Review and Trends Report
  - CIMdata PLM Market and Solution Provider Analysis Report
  - CIMdata PLM Market Geographic Analysis Report
  - CIMdata PLM Market Industry Analysis Report
- Country reports for the Brazil, China, Germany, India, Japan, Russia, South Korea, Italy, United Kingdom, France, and the United States
- CAM MAR (29<sup>th</sup> year)
- Simulation & Analysis (S&A) MAR

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# 2020 Market Analysis Results

## CIMdata PLM Market & Industry Forum

### Next Sessions

*We look forward to you joining us*

#### Tuesday, 7 April 2020 – SESSION 2

8:00 am – 8:15 am (EDT) / 2:00pm (CEST) | Q&A - 2019 Market Analysis Results  
*Stan Przybylinski, Vice President, CIMdata*

8:15 am – 8:50 am | Synching Siloed Development  
*Craig Brown, Executive Consultant, CIMdata*

8:50 am – 9:25 am | xBOM Management Across the Lifecycle Learn More  
*Tom Gill, Practice Manager, PLM Enterprise Value & Integration, CIMdata*

9:25 am – 10:00 am | Closed-Loop Product Development Learn More  
*Stan Przybylinski, Vice President, CIMdata*

#### Thursday, 9 April 2020 – SESSION 3

8:00 am – 8:20 am | Multiple View Bill of Materials Solution Evaluation Benchmarks  
*James Roche, Director, A&D Practice, CIMdata*

8:20 am – 8:40 am | Agile Methodologies & PLM  
*Tom Gill, Practice Manager, PLM Enterprise and Integration, CIMdata*

8:40 am – 9:00 am | Closing the Smart, Connected Lifecycle Loop with IoT  
*Peter Bilello, President & CEO, CIMdata*

9:00 am – 9:30 am | Q&A Session  
*Peter Bilello, President & CEO, CIMdata*

9:30 am – 9:45 am | Closing Comments  
*Peter Bilello, President & CEO, CIMdata*

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