2022 PLM Market Results

2023 PLM Market & Industry Forum—4 April 2023

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2022 PLM Market Results
PLM Market & Industry Forum
A CIMdata Leadership Event

4 April 2023—Frankfurt, GERMANY

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CIMdata Defining What Comes Next in Digital Transformation

Strategic management consulting for competitive advantage in global markets

The leading independent authority on PLM and its digital transformation. We provide research, education, and strategic consulting to clients around the world.

OUR MISSION:
Maximizing clients' ability to design, acquire, deliver, and support innovative products and services.

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Purpose of this Presentation

A CIMdata disclaimer

- Deliver an overview of CIMdata's analysis of the PLM market for calendar year 2022
- Present our estimates of direct provider revenues by various categories
- Provide insight into investment changes, trends and market leaders
- A detailed analysis of this research will be provided in CIMdata's 2023 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 2022 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
  - We will note those during the presentation

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Agenda

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

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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

Revenues most often reported in USD, Euros, and Japanese Yen

Currency	2021	2022	YoY Change
Euro TO US Dollar	1.182657	1.051524	11.09%
Pound TO US Dollar	1.375573	1.233	10.36%
Japanese Yen TO US Dollar	0.0091103	0.007608	16.49%
Swiss Franc TO US Dollar	1.094061	1.04712	4.29%
Chinese Yuan TO US Dollar	0.154885	0.1487	3.99%
Korean Won TO US Dollar	0.000874	0.000774348	11.40%
Swedish Krona TO US Dollar	0.116592	0.09893	15.15%
Brazilian Real TO US Dollar	0.186181	0.194	-4.20%
Indian Rupee TO US Dollar	0.013553	0.0127	6.29%
Australian Dollar Rupee TO US Dollar	0.751042	0.69348	7.66%
Norwegian Krone TO US Dollar	0.116394	0.104026	10.63%

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Acquisitions in 2022

Some big, many tuck-ins but still at a high rate, 185 overall (1 of 4)

- Aras added Minerva Group and XPLM
- Autodesk acquired Moxion and The Wild
- Centric Software added StyleSage
- Dassault Systems acquired Diota
- IBM added 6, none in the PLM space
- PTC added Codebeamer, CloudMilling, and ServiceMax
  - Spun out services business to ITC Infotech – DxP Services
- Siemens acquired Avery Design Systems

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Acquisitions in 2022

Some big, many tuck-ins but still at a high rate, 185 overall (2 of 4)

- Altair added Cassini, Powersim, Gen3D, Concept Engineering, and RapidMiner
- Ansys acquired OnScale, Motor Design Limited, C&R Technologies, and a German DYNA partner
- Hexagon added 12, ETQ, 4 CAM VARs
- Rockwell Automation acquired CUBIC
- Sandvik added 12, including DCS, mining and tooling offerings
- Trimble acquired 5

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Acquisitions in 2022

Some big, many tuck-ins but still at a high rate, 185 overall (3 of 4)

- Cadence acquired Future Facilities and OpenEye
- Synopsys added WhiteHat Security

- Accenture slowed with only 25, Inspirage & Stellantis* in PLM
- Atos acquired Cloudreach, announced major org changes
- Capgemini with 4, none in PLM space
- HCL added Quest Informatics and Starschema
- NTT DATA added 5, announced reorganization

10 *service entity within the Stellantis group

Acquisitions in 2022

Some big, many tuck-ins but still at a high rate, 185 overall (4 of 4)

- Addnode (4) and TECHNIA (2), including 3 Dassault Systèmes VARs
- Wipro acquired Convergence Acceleration Solutions, LLC
- Aspen Technology acquired inmation Software GmbH and Micromine
- Bentley Systems (2), including eagle.io and Power Line Systems
- IFS added Ultimo
- Lectra acquired controlling stake in TextileGenesis and a Turkish Gerber distributor

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Changes in Market Sample

Looking to cover more and more of the overall PLM market

- Most of the acquisitions will not affect the overall market results
  - Of course, acquisitions will affect the results of individual companies
  - 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 several other companies to our analysis

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Defining PLM

Digital transformation of the lifecycle, enabled by the product innovation platform

PLM is…

- A strategic business approach powered by a consistent set of solutions
- Enabled by product innovation platforms that support the extended enterprise
- An approach that spans the full lifecycle, from idea through life
- Enables a set of evolving functional domains orchestrated by an extended enterprise-level “systems of systems” approach

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PLM Market Categories

Three major segments comprise the PLM Market

- collaborative Product Definition management
  - Applications & solutions that capture, manage, disseminate, visualize and collaborate on product related intellectual (digital/virtual) information, including related processes
- Tools
  - Applications 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 2022 under forecast

- Overall PLM growth (8.6%) below forecast (10.1%)
- Large currency fluctuations affected results
- Another strong year for S&A and EDA leaders
- Continued industry consolidation, new entrants, investor interest, and action
  - SI/Reseller/VAR the most active segment, Accenture (again) but slowing
  - Many companies buying up their VARs
  - Major PLM players trying to differentiate, expand reach

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2022 Market Results

Results by segment (US$ Millions)

Segment	2022 Revenues	YoY Growth
cPDm Comprehensive Technology Providers	$8,392.6	8.5%
cPDm-Focused Applications	$3,099.2	8.5%
Digital Manufacturing	$893.4	2.1%
SI/Reseller/VAR	$9,261.4	7.6%
Tools		
MCAD-Multi-Discipline	$4,056.5	1.2%
MCAD-Design-Focused	$4,197.9	8.2%
Non-Bundled CAM	$1,697.5	8.1%
Simulation & Analysis	$9,010.2	8.2%
Other Tools (e.g., ALM)	$2,103.5	7.7%
EDA	$14,946.9	12.5%
AEC	$8,139.3	8.3%
Total	$65,798.3	8.6%

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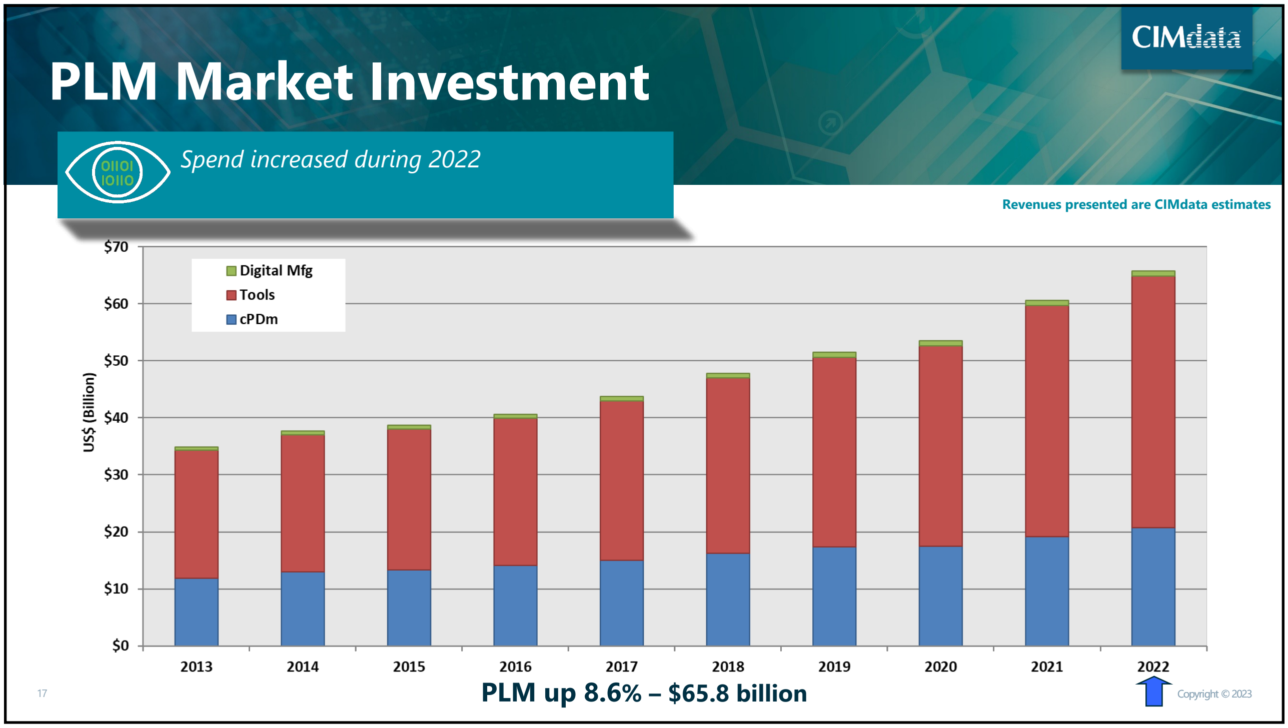

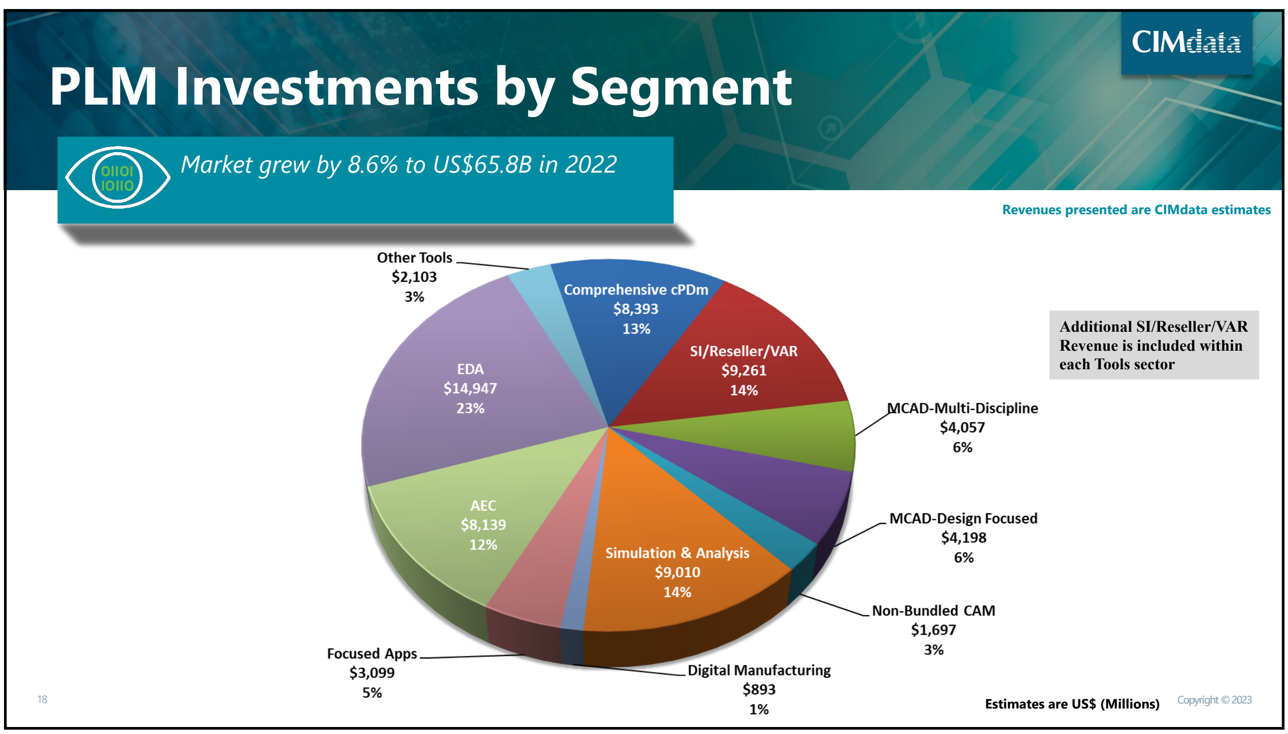

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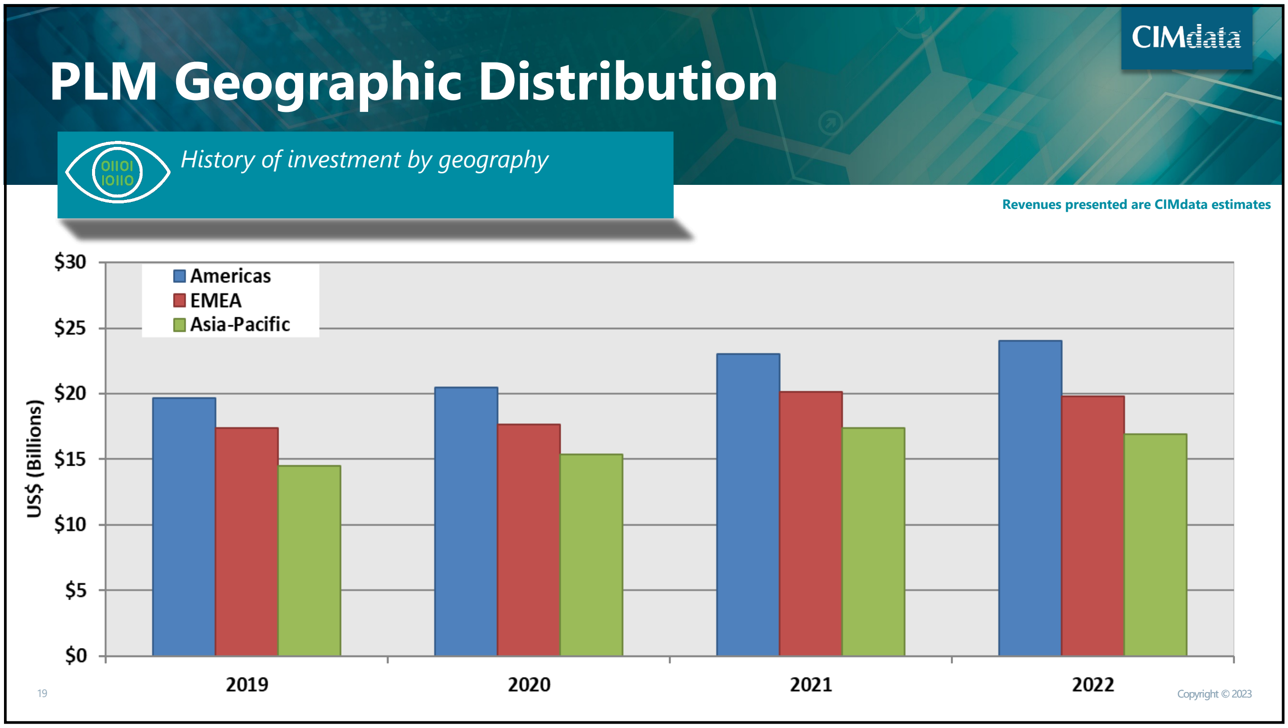

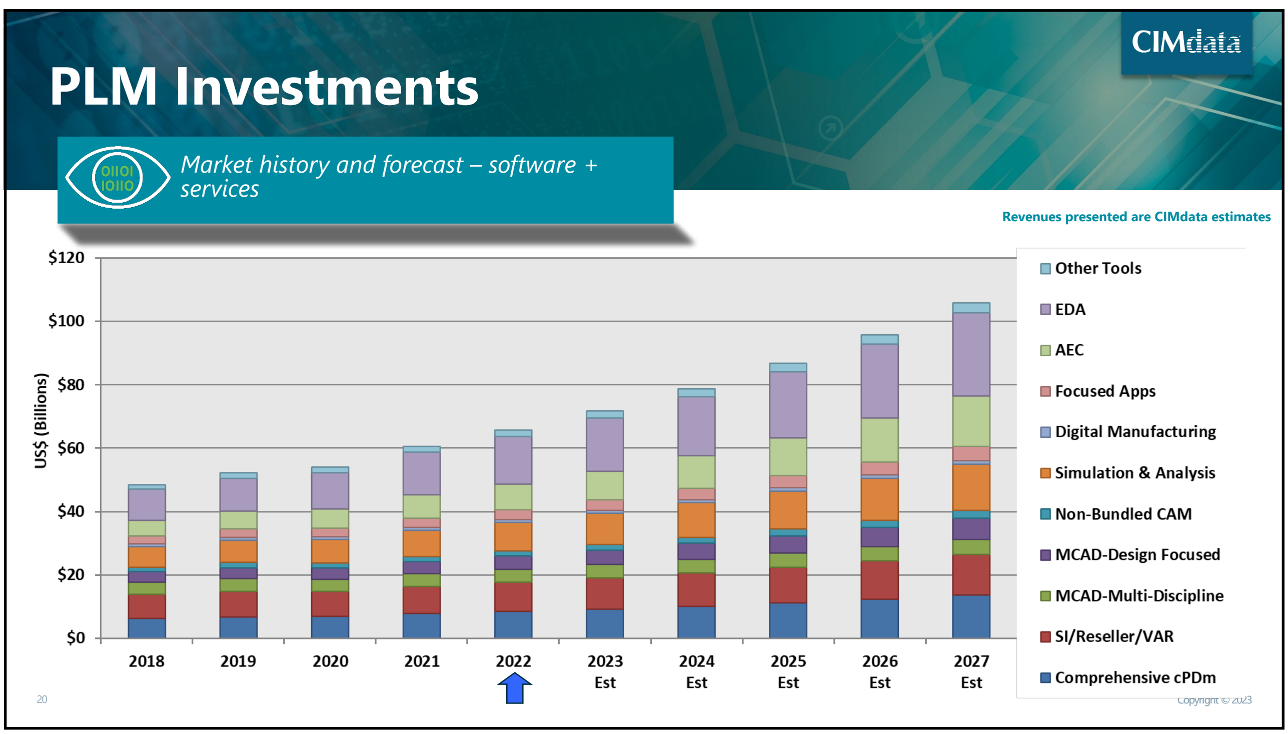

PLM Market in 2023

Trends strong, economic headwinds ahead

- What does 2023 mean for the coming years?
- Growth slower in EMEA for 2023, expected to pick up after
- Not clear if currency fluctuations will continue
- Siemens move to SaaS will accelerate
- Still seems to be appetite for M&A
- CIMdata believes the market still has a lot of potential
  - Industry 4.0, digital thread creating strong pull for software and services

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Market Forecasts

2023 (US$ Millions) and 5-year compound annual growth rate (CAGR)

Segment	2023 Estimate	YoY Growth	5 Year CAGR
cPDm Comprehensive Technology Providers	$9,158.60	9.1%	10.1%
cPDm-Focused Applications	$3,326.70	7.3%	7.7%
Digital Manufacturing	$938.96	5.1%	6.6%
SI/Reseller/VAR	$9,874.46	6.6%	6.8%
Tools			
MCAD-Multi Discipline	$4,186.33	3.2%	3.3%
MCAD-Design Focused	$4,567.27	8.8%	9.8%
Non-Bundled CAM	$1,816.31	7.0%	7.2%
Simulation & Analysis	$9,839.17	9.2%	10.0%
Other Tools (e.g., ALM)	$2,269.65	7.9%	7.9%
EDA	$16,695.67	11.7%	11.8%
AEC	$9,076.90	11.5%	14.4%
Total	$71,750.01	9.0%	10.0%

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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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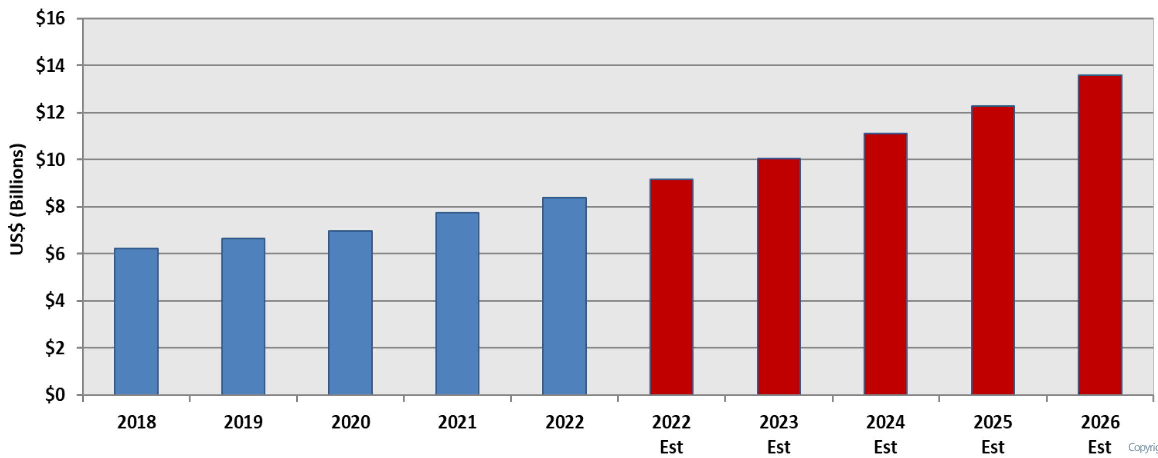
2022 cPDm Revenue Distribution

Total investment = software + services
Five-year CAGR estimate = 10.1%

Revenues presented are CIMdata estimates



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Revenue Ratios – Software vs. Services

Services is a major revenue area

- Overall cPDm market: services are 54.6%
  - Driven by independent services providers
- Comprehensive cPDm providers
  - In 2022, Software was 73.4% vs. 26.6% for Services
  - In 2021, Software was 72.3% vs. 27.7% 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, really just different types
  - Nature of services changing – more need for skills in advanced PLM topics vs. IT installation and integration

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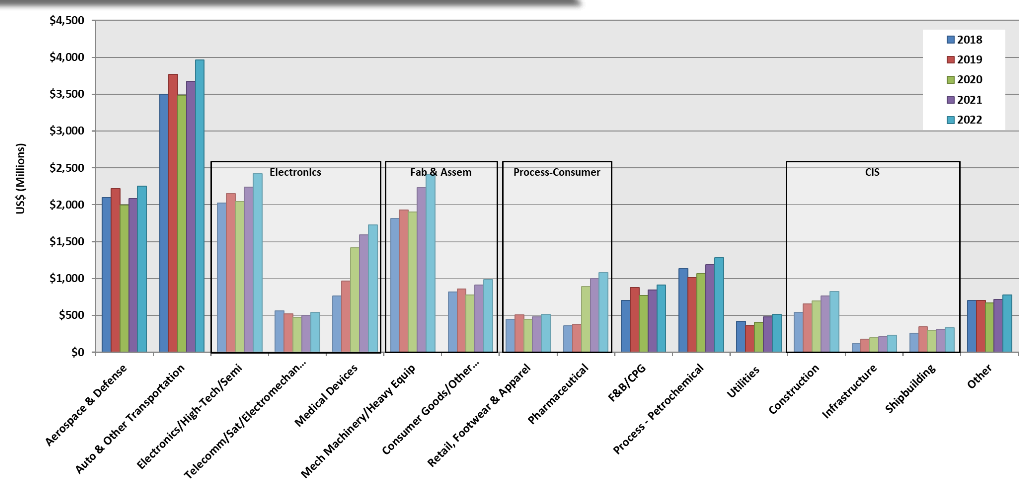
cPDm Investment

Investments by industry in total cPDm

Revenues presented are CIMdata estimates



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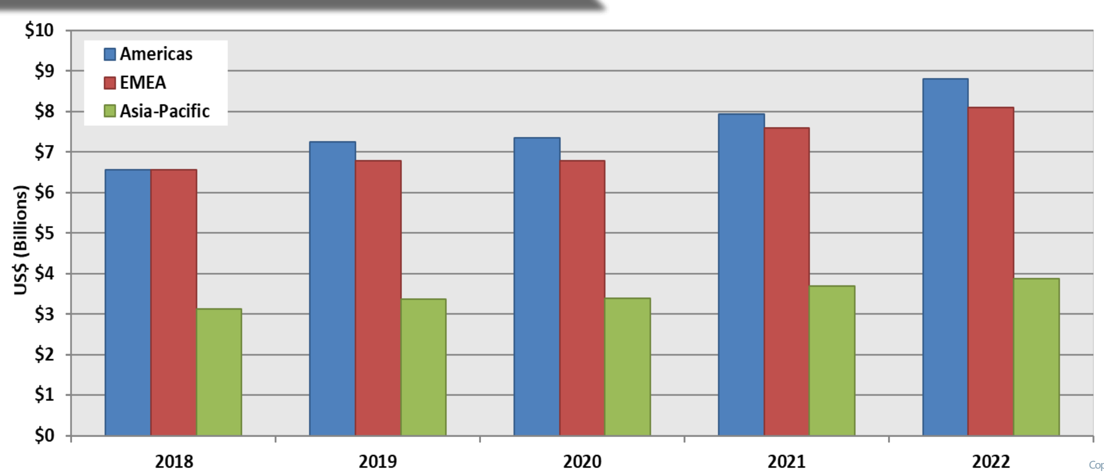
cPDm Investment

Investment by geography in total cPDm

Revenues presented are CIMdata estimates



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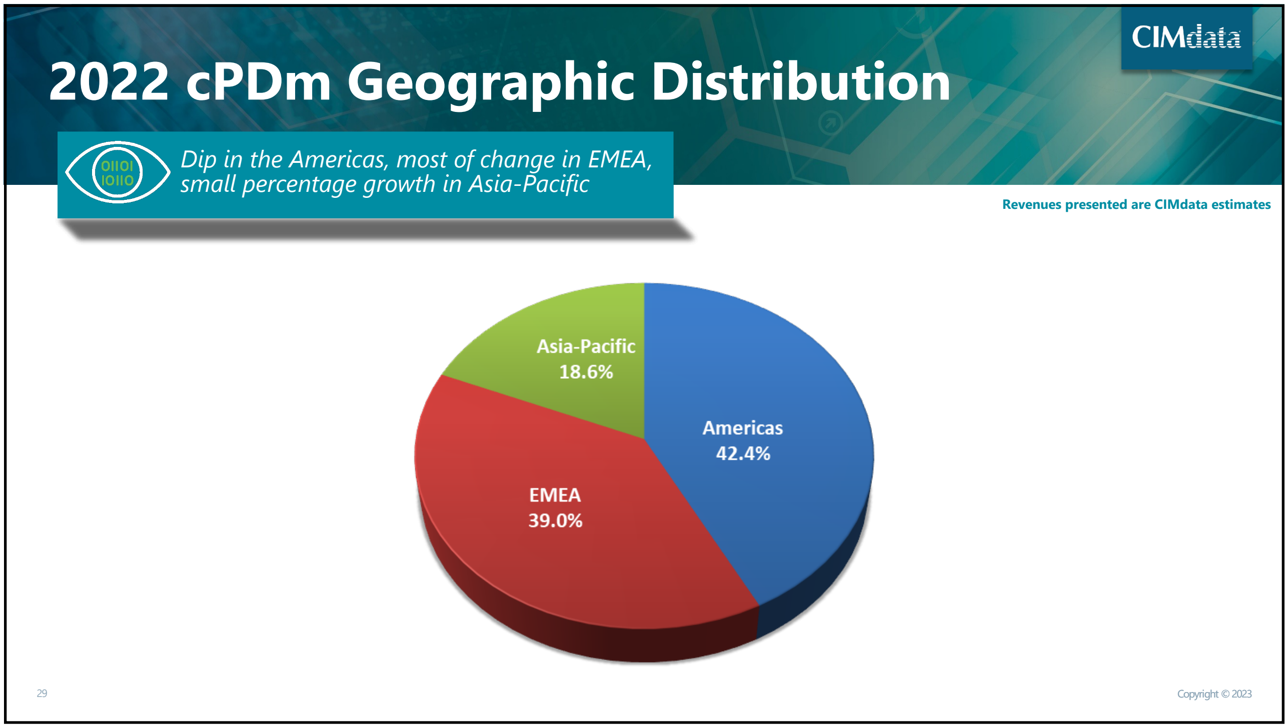

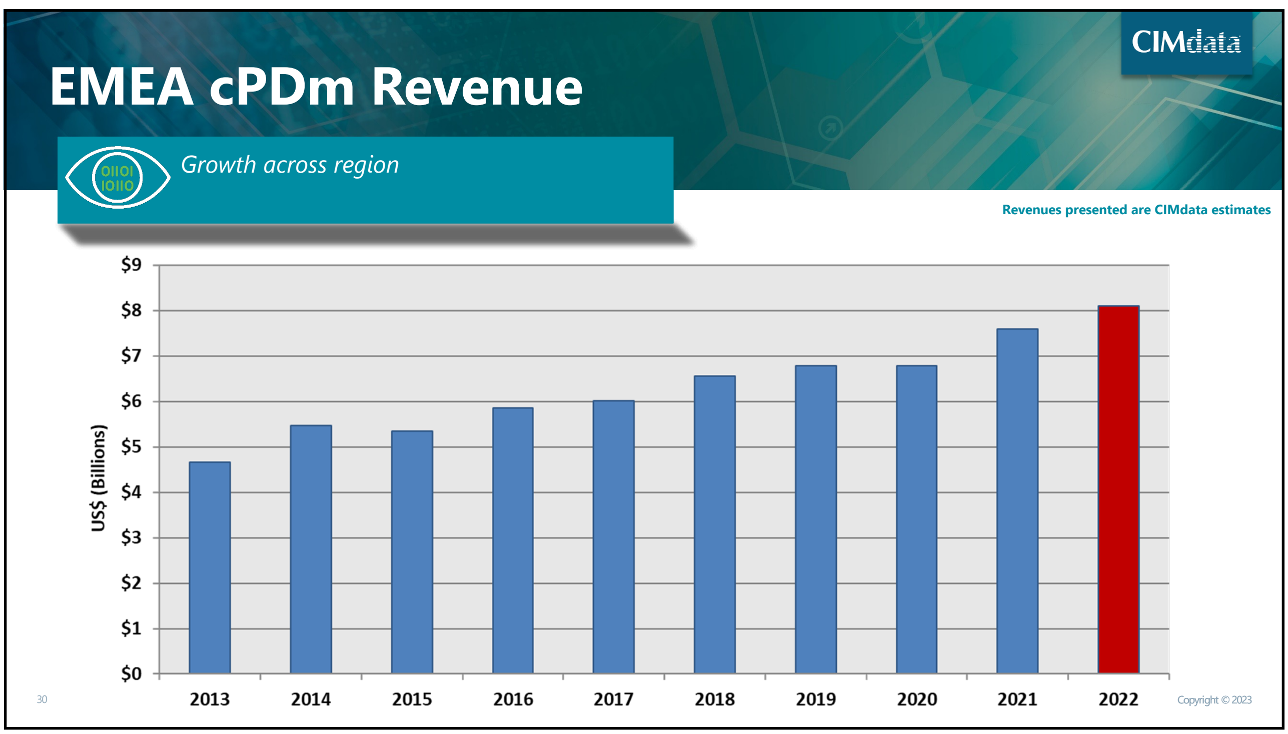

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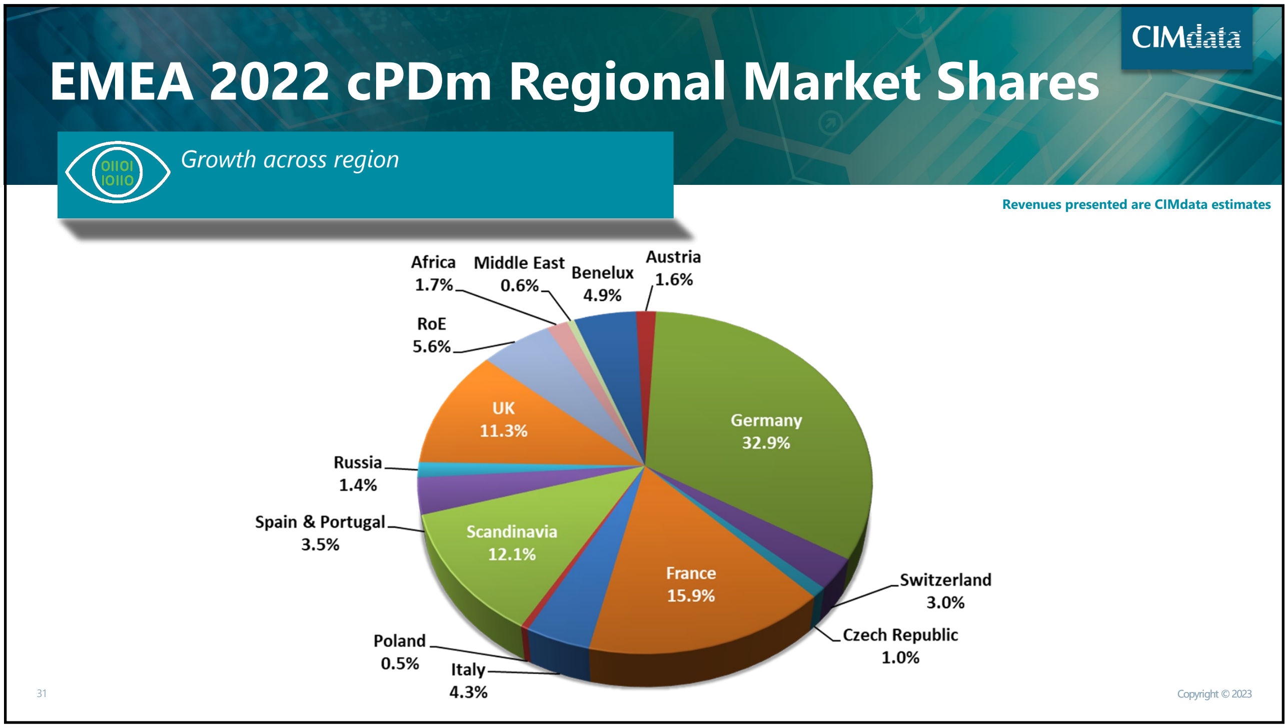

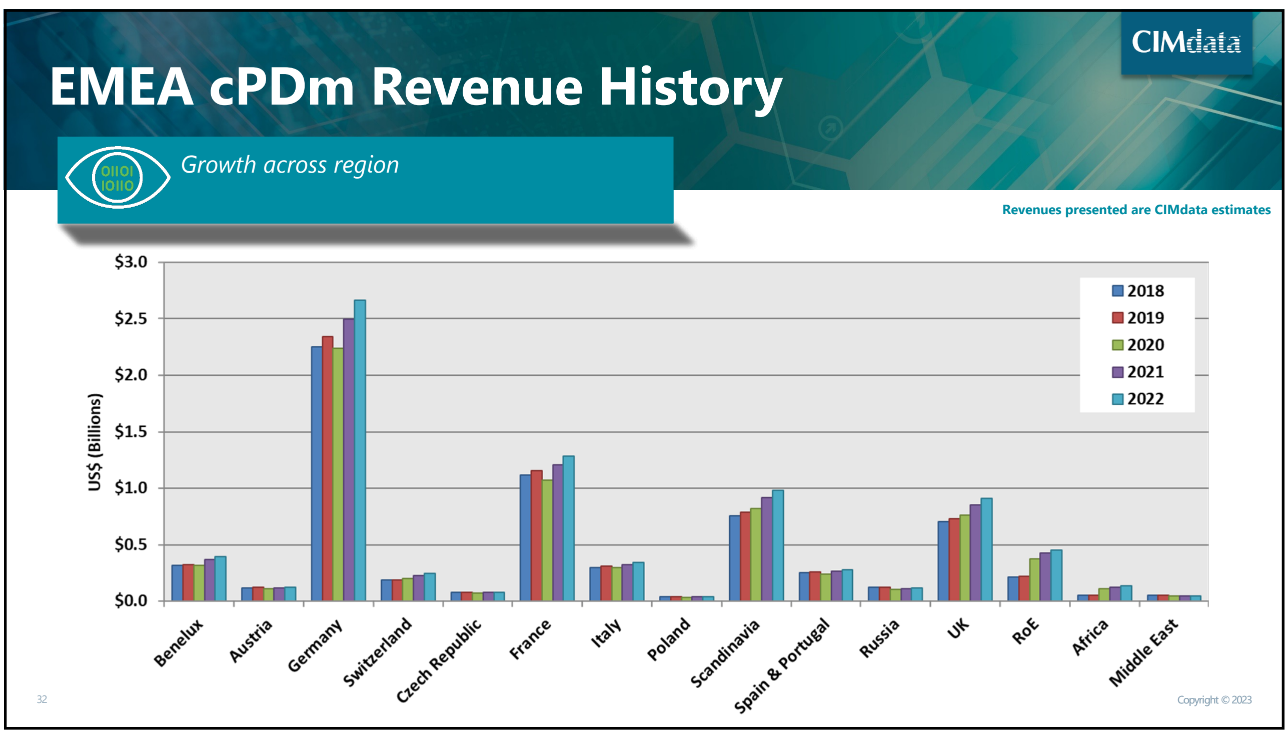

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PLM Mindshare Leaders

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
  - Some 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

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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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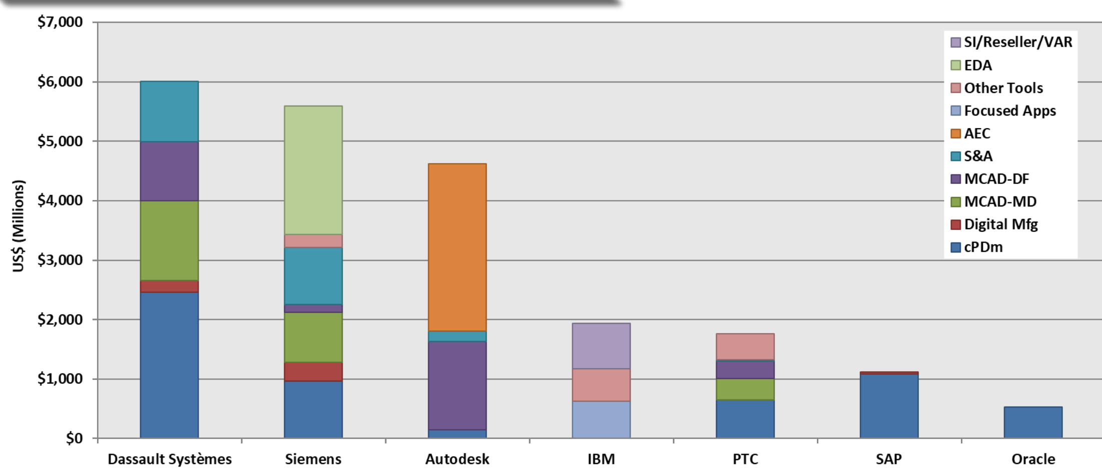
2022 PLM Mindshare Leaders Revenue

Leaders' direct revenues—led by providers of CAD tools

Revenues presented are CIMdata estimates



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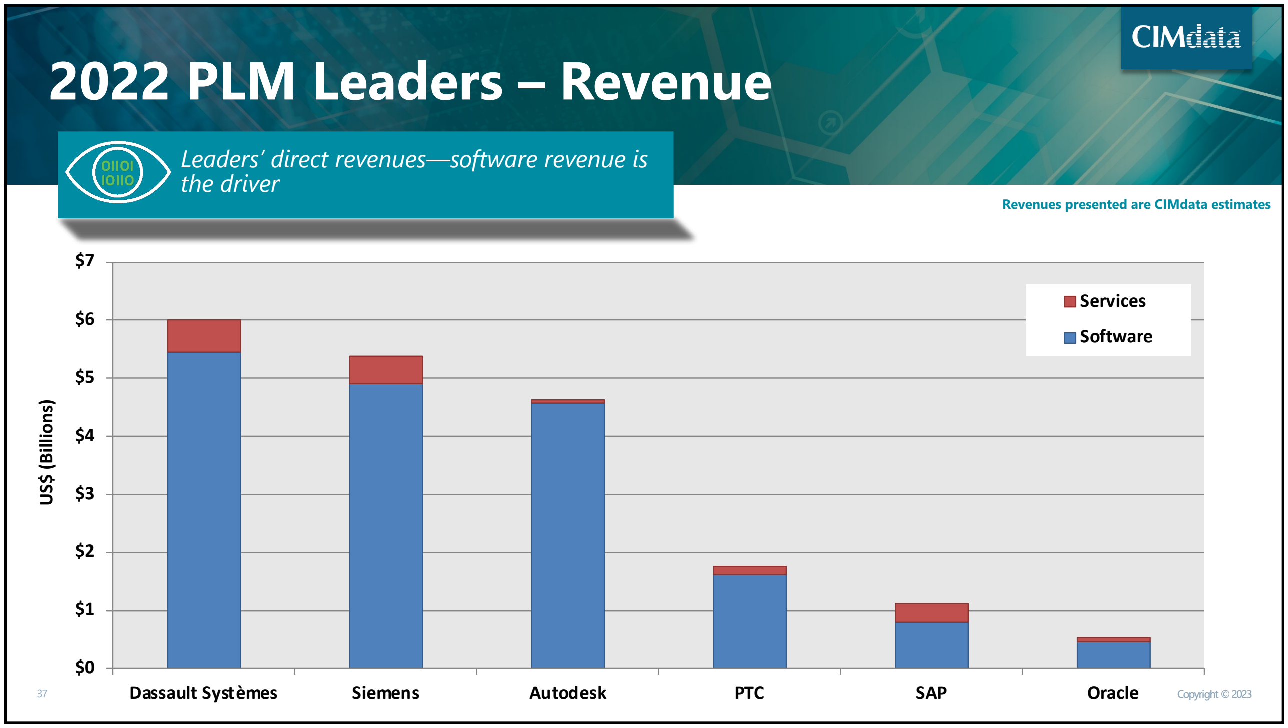

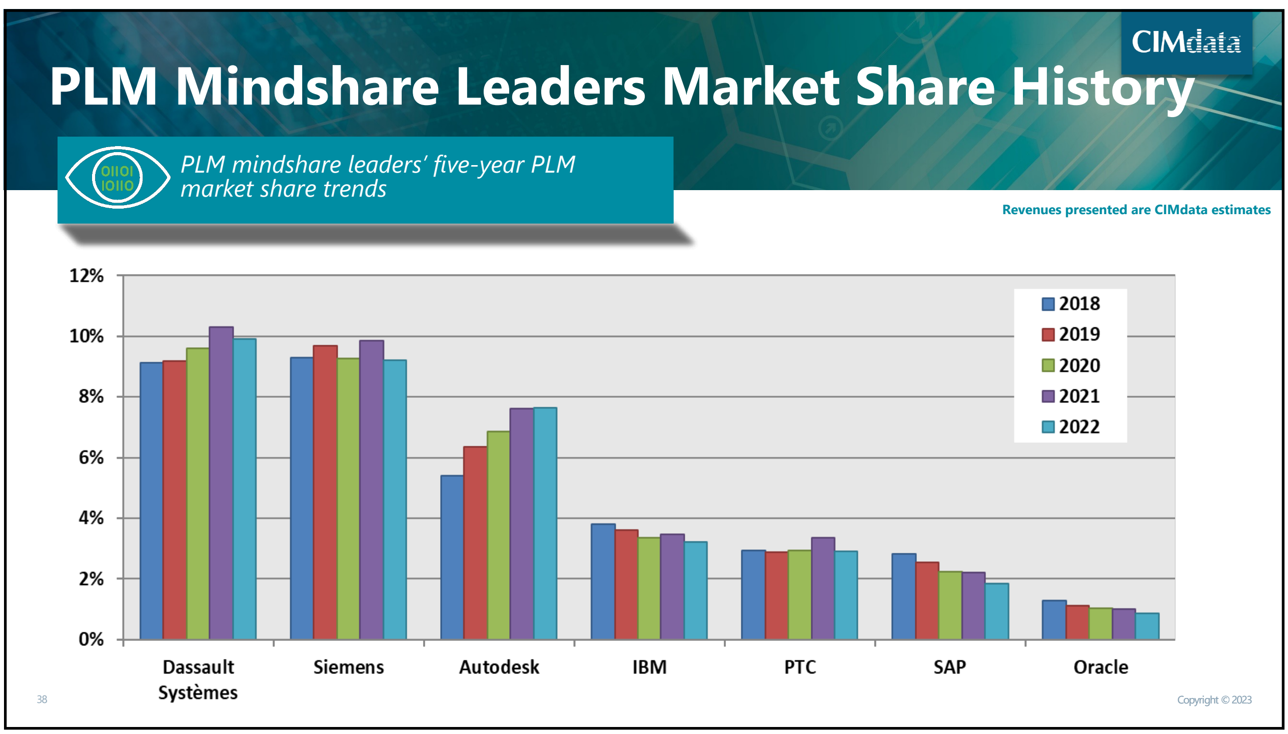

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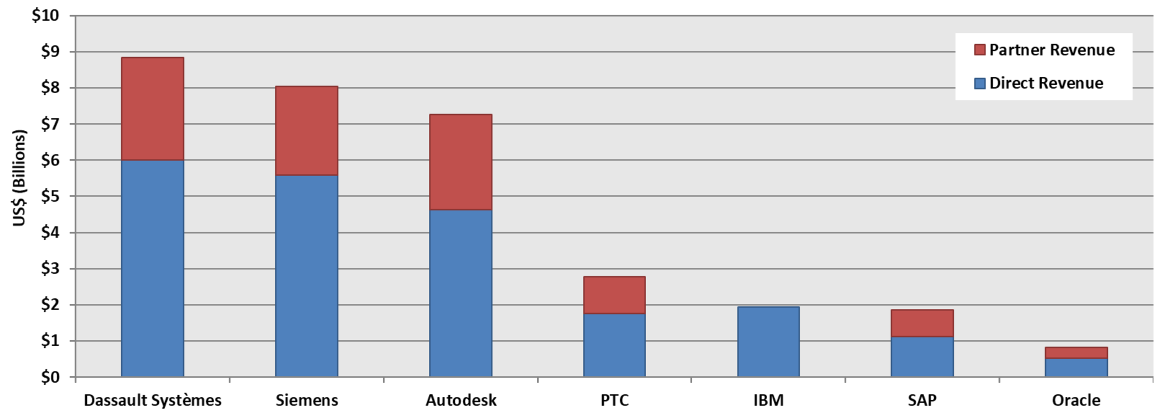
2022 PLM Mindshare Leaders Presence

PLM leaders' footprints in industry—heavily leveraging partners

Revenues presented are CIMdata estimates



Presence = Provider direct PLM revenue + Partners' direct PLM revenue (adjusted for royalty payments to eliminate double counting)

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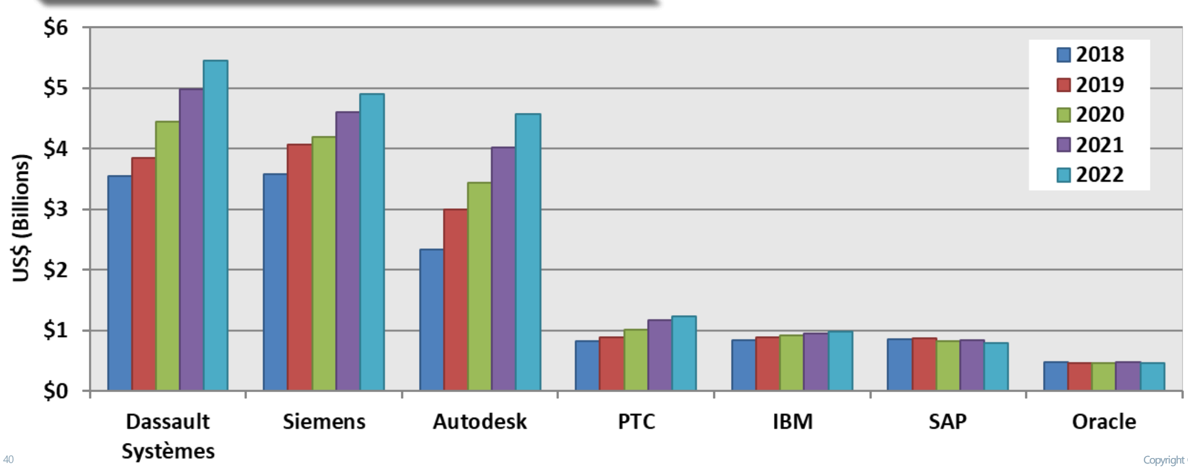
PLM Leaders Software History

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

Revenues presented are CIMdata estimates



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Overall PLM Market Revenue Leaders

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The market leaders are a diverse group

- Several are focused on specific technologies or industries
- Some have multiple lines of business
- Some are partners of multiple other providers
- Many are not competitors
- Fifteen companies over $1B in revenue (was 13 in 2021)
  - Two EDA
  - Two AEC
  - Five Comprehensive cPDm
  - Two SI/Reseller/VAR
  - Two S&A
  - One Focused cPDm
  - And Hexagon

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2022 Overall PLM Revenue Leaders

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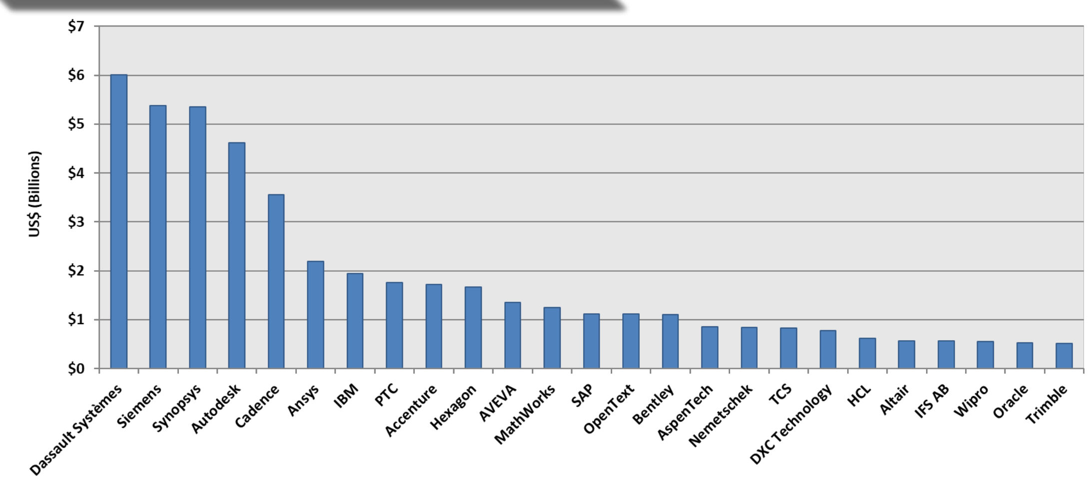
Many diverse companies generate PLM revenue

Revenues presented are CIMdata estimates



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Scope of Services Continues to Evolve

More and different services are needed—even more of a challenge now (1 of 2)

- PLM continues to interface, exchange information and processes with more and more business solutions
  - Expanding footprint, support for digital thread 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

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Scope of Services Continues to Evolve

More and different services are needed—even more of a challenge now (2 of 2)

- 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
  - Most have in-house technology as a "force multiplier"

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Service Providers

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Services companies continue to increase PLM commitments (1 of 2)

- 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,…
    - PTC spun out services business to ITC Infotech – DxP Services
    - Atos working to refocus core business on digital
    - NTT Data consolidating business units
  - Regional/focused SIs continue expanding
    - NEC, Addnode, Samsung SDS,…

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Service Providers

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Services companies continue to increase PLM commitments (2 of 2)

- Developing offerings on top of solution provider technology
  - Adding their domain expertise
  - Industry and/or functional solutions
  - Selling through ISVs or direct to industrial companies
- Supporting ISV stacks on other hyperscalers
  - E.g., Accenture offering Xcelerator on Microsoft Azure
- Creating meta processes that can leverage offerings from many different providers, e.g.:
  - TCS “Connected Digital Enterprise”
  - SAIC Digital Engineering

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2022 PLM Services Revenue Leaders

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Changes in the services organizations of leading PLM solution providers

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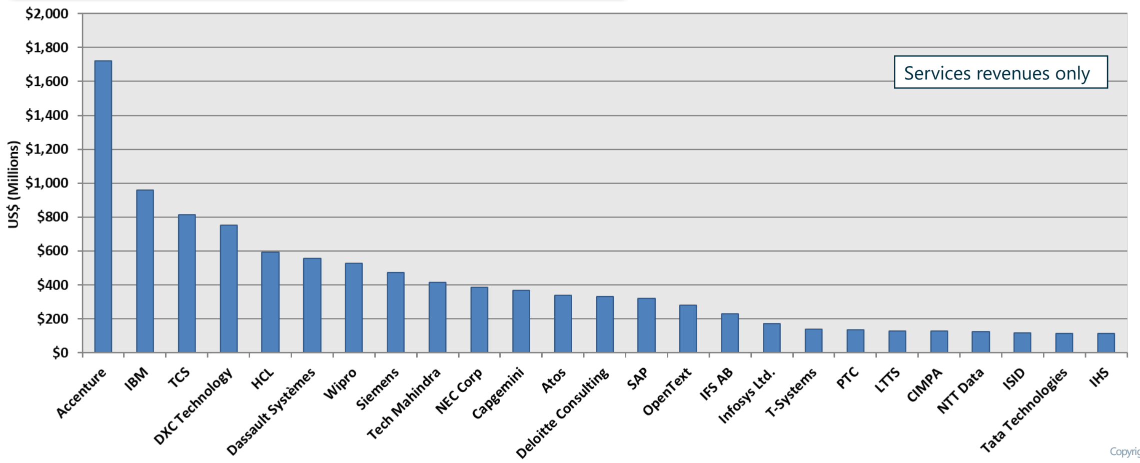

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Focused Application Providers

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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., PTC and ServiceMax
- Difficult to continue to measure separately post-acquisition

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- Concluding Remarks

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cPDm Provider Analysis

Review of cPDm provider revenue performance

- cPDm sector results softer than expected, currency had impacts
- Comprehensive segment dominated by "mindshare" leaders
  - Aras, Dassault Systèmes, Oracle, PTC, SAP, and Siemens
- Other major providers
  - Autodesk, IBM, IFS, and Infor
  - NEC focused on Japan
- New providers continue to emerge
  - Continuing the expansion
  - Cloud-native (Ganister, JWI, OpenBOM, etc.), some on cloud platforms (Propel)
  - Local providers, i.e., China

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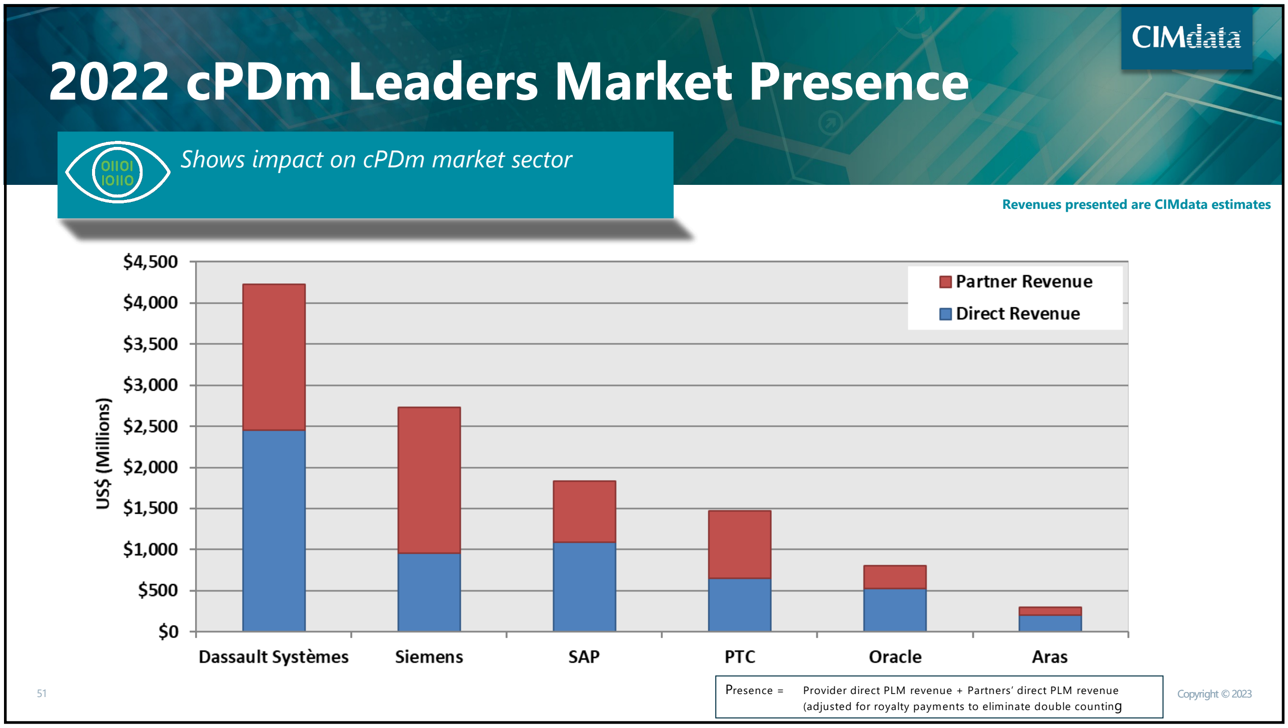

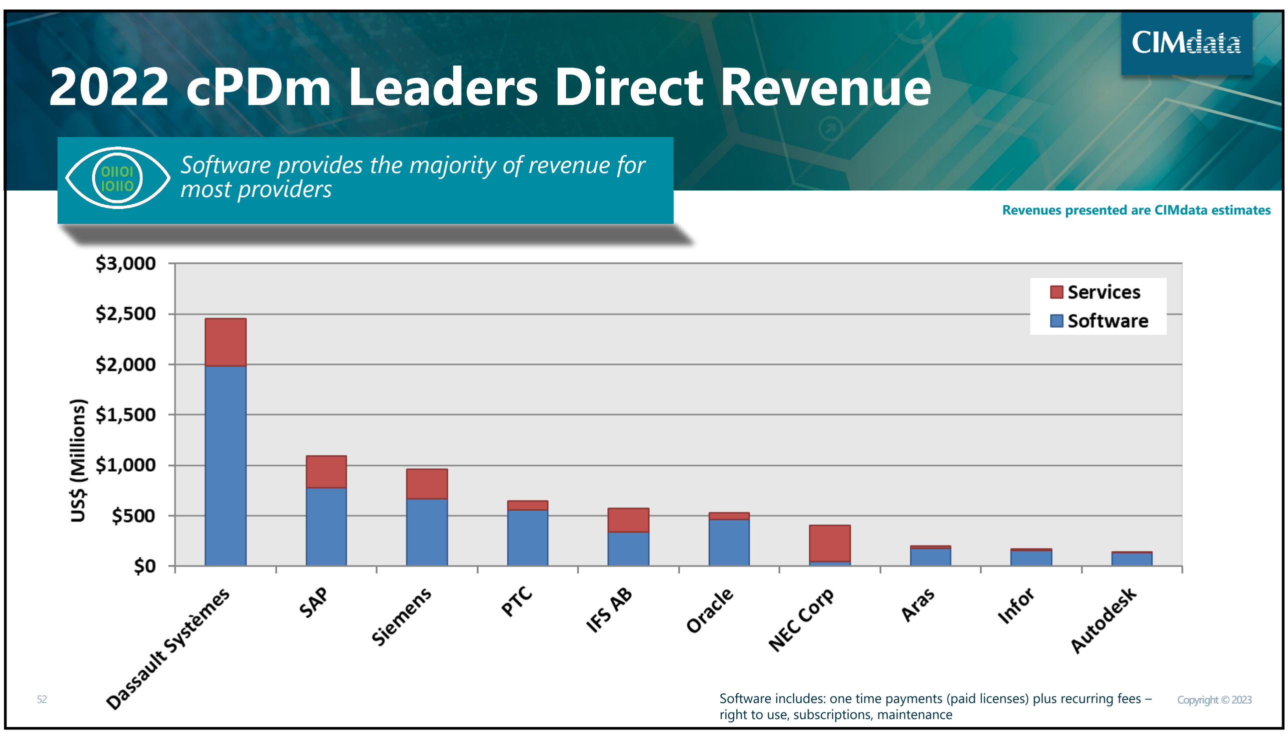

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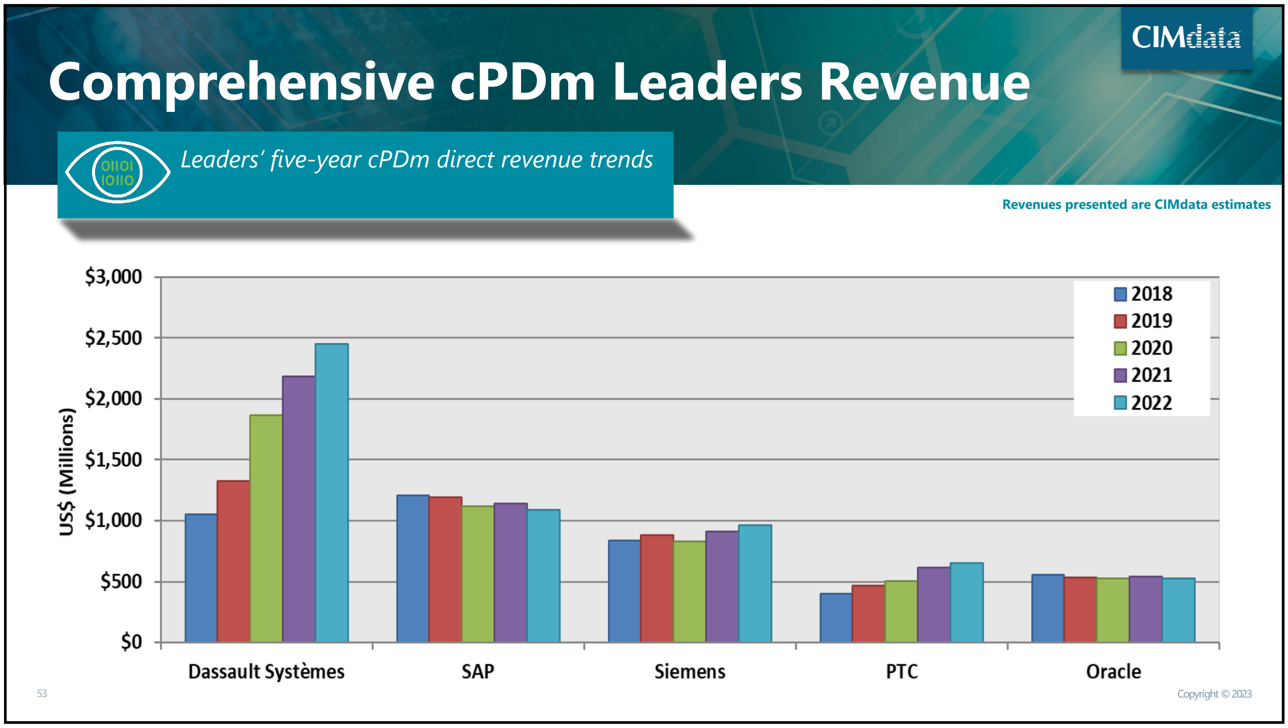

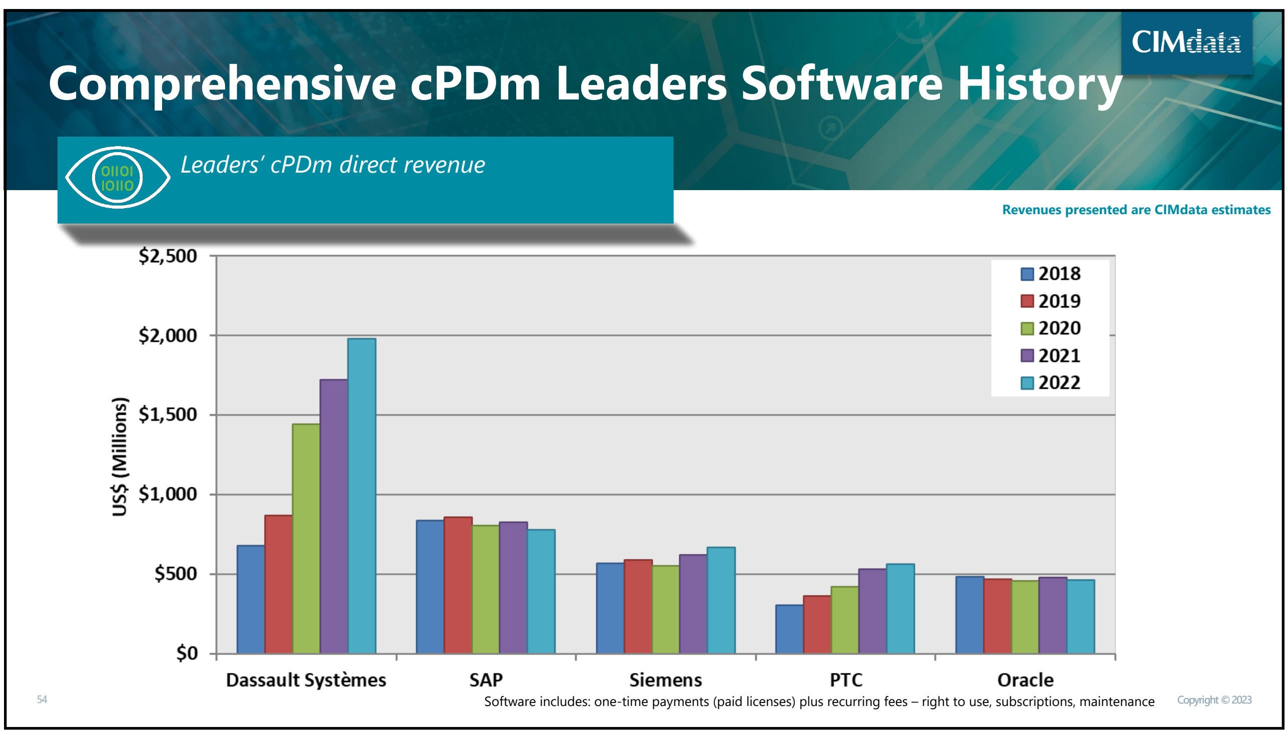

2022 Comprehensive cPDm Providers

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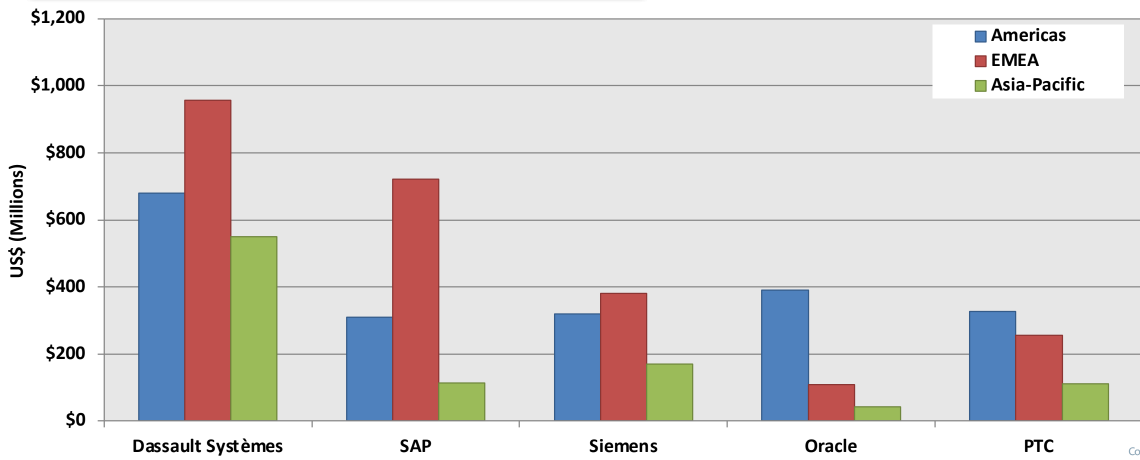
Leaders have different regional direct revenues

Revenues presented are CIMdata estimates



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Discrete cPDm

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The industries of interest span more than discrete manufacturing

- PLM came out of discrete manufacturing
- Comprehensive cPDm has always been about more than just that
- Platforms can support many industries, and do!
- What if we focus on discrete?

Aerospace and Defense
Auto & Other Transportation - automotive, truck, bus, train, motorcycle
Electronics - electronics, telecommunications, high-tech, medical devices and satellites
Electronics, high-tech, semiconductors
Telecommunications, satellites, electromechanics
Medical devices
Fabrication and Assembly - consumer product goods, other discrete
Mechanical machinery, heavy equipment
Consumer product goods, household appliances, other discrete
Retail, footwear & apparel
Pharmaceutical, Food & Beverage, Consumer Packaged Goods
Pharmaceutical
Food & Beverage, Consumer Packaged Goods
Petrochemical, bulk chemical, oil and gas extraction
Utilities - electricity, gas, water and drainage, telecom operators
Shipbuilding
Construction - civil engineering, EPC, homebuilding
Infrastructure - roadways, airports, harbors, railway systems
Other - financial services, insurance, etc.

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Discrete cPDm

The industries of interest span more than discrete manufacturing

- PLM came out of discrete manufacturing
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- Platforms can support many industries, and do!
- What if we focus on discrete?

Aerospace and Defense
Auto & Other Transportation - automotive, truck, bus, train, motorcycle
Electronics - electronics, telecommunications, high-tech, medical devices and satellites
Electronics, high-tech, semiconductors
Telecommunications, satellites, electromechanics
Medical devices
Fabrication and Assembly - consumer product goods, other discrete
Mechanical machinery, heavy equipment
Consumer product goods, household appliances, other discrete
Retail, footwear & apparel

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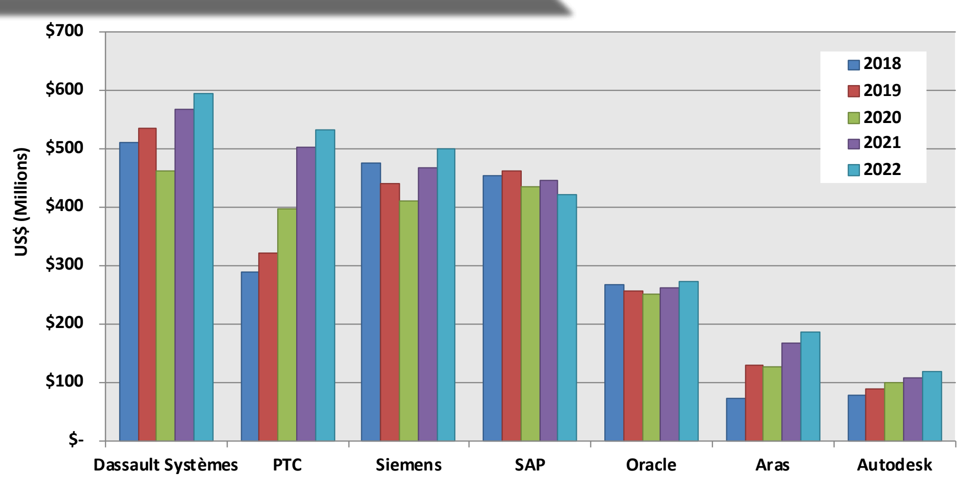
Discrete cPDm Software Revenues

Remove services, non-discrete-focused brands and revenues

Revenues presented are CIMdata estimates



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2022 PLM Market Results

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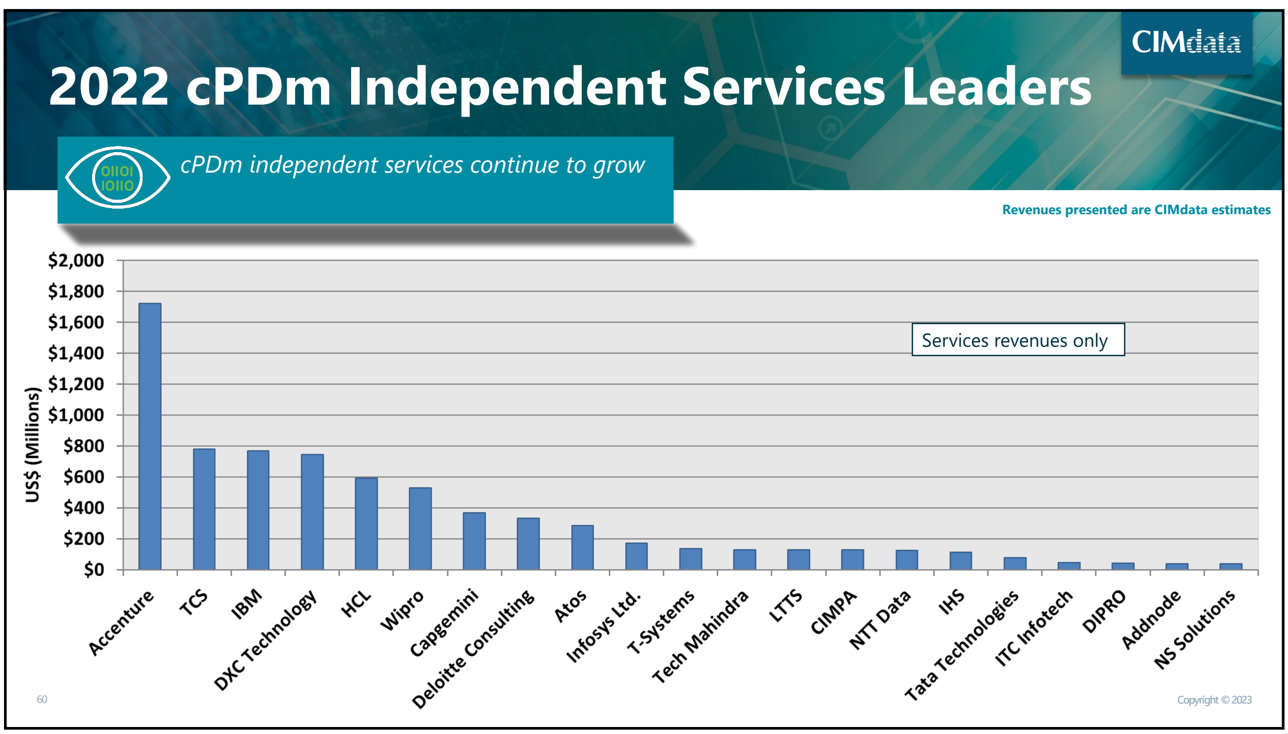

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Overall cPDm Providers

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
  - Both organically and through acquisitions
- Fifteen cPDm solution and service providers larger than $400M in 2022 (same as in 2021)

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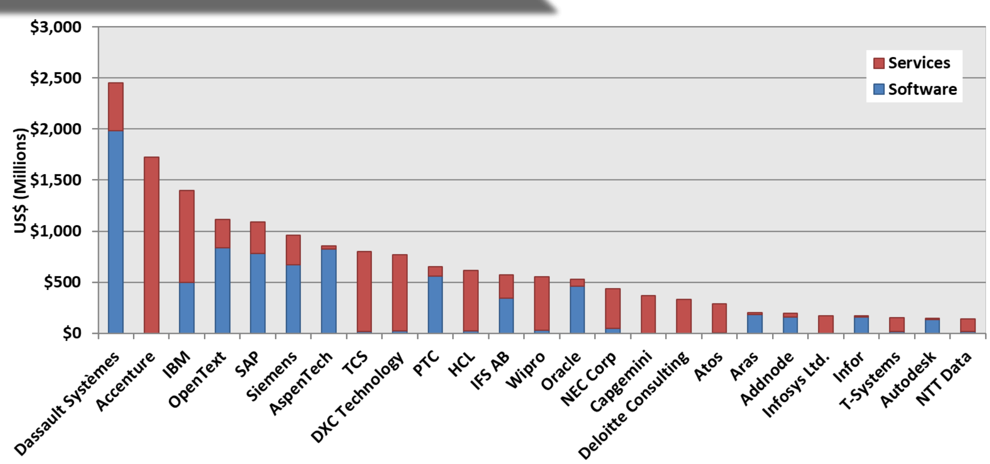
CIMdata

Overall 2022 cPDm Revenue Leaders

Services are a major factor in overall revenue

Revenues presented are CIMdata estimates



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

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Comments on Tool Segments

Will be some impact from conflict in Ukraine

Segment	Comments
MCAD-MD	Expect continued slow growth in this segment as auto and A&D stagnate; most opportunity in countries investing in those industries
MCAD-DF	DF segment often affected by recession; results buoyed by Autodesk and PTC move to subscription; SOLIDWORKS a consistent performer
CAM	A bit stronger growth in 2022, expect high end of historical 5-7% range
S&A	Significant M&A activity in market leaders, trends driving growth will remain strong (smart connected product/Industry 4.0, need for more simulation on the left side of the Vee)
EDA	Strong year, even stronger for others besides the leaders; same trends as S&A
AEC	Key to (re)defining the built world, expanding interest in discrete PLM capabilities; oil & gas affected by energy prices, economic turmoil. Severe currency impacts in 2022
Other Tools	Again, smart connected products driving investments; e.g., Atlassian up 30+% again in last fiscal year

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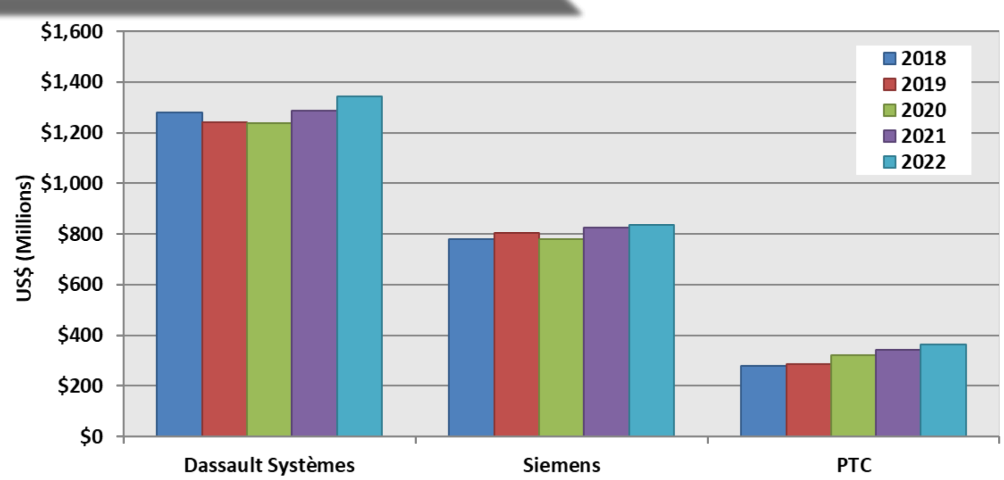
MCAD Multi-Discipline

Leaders' revenue histories

Revenues presented are CIMdata estimates



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MCAD Design-Focused

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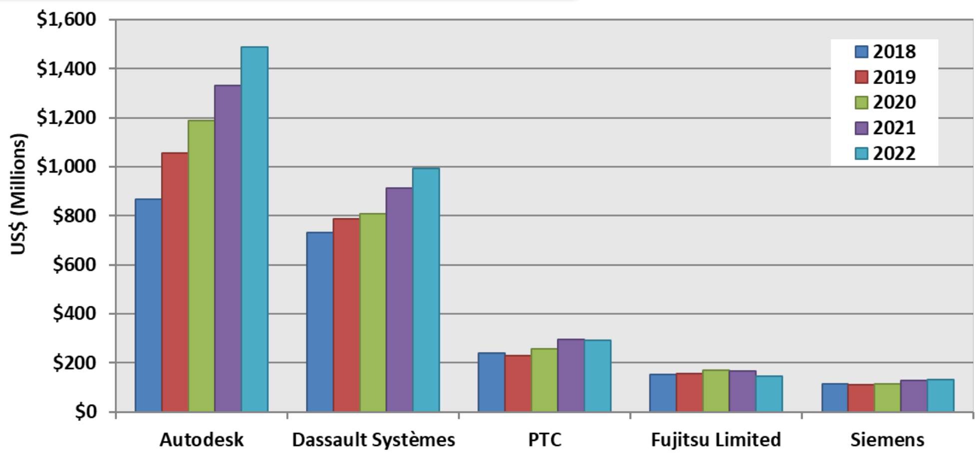
Leaders' revenue histories

Revenues presented are CIMdata estimates



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Combined MCAD

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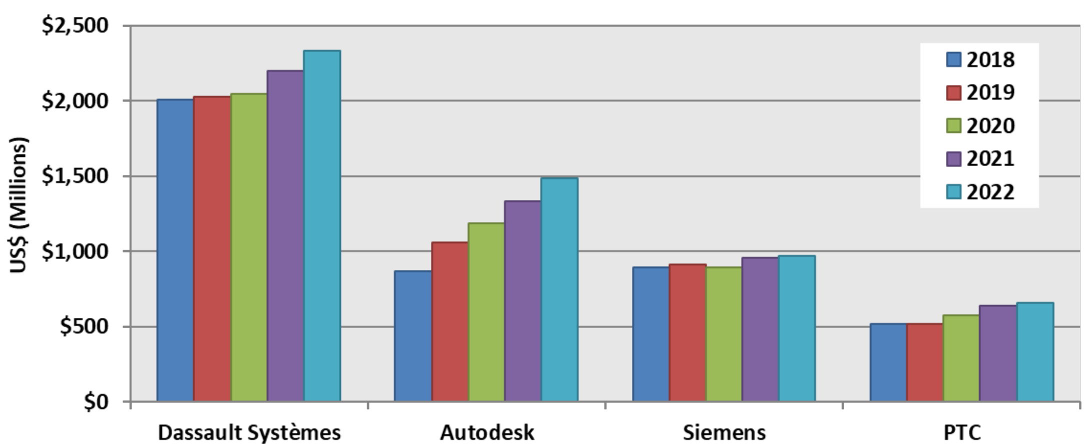
Leaders' revenue histories

Revenues presented are CIMdata estimates



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Simulation & Analysis

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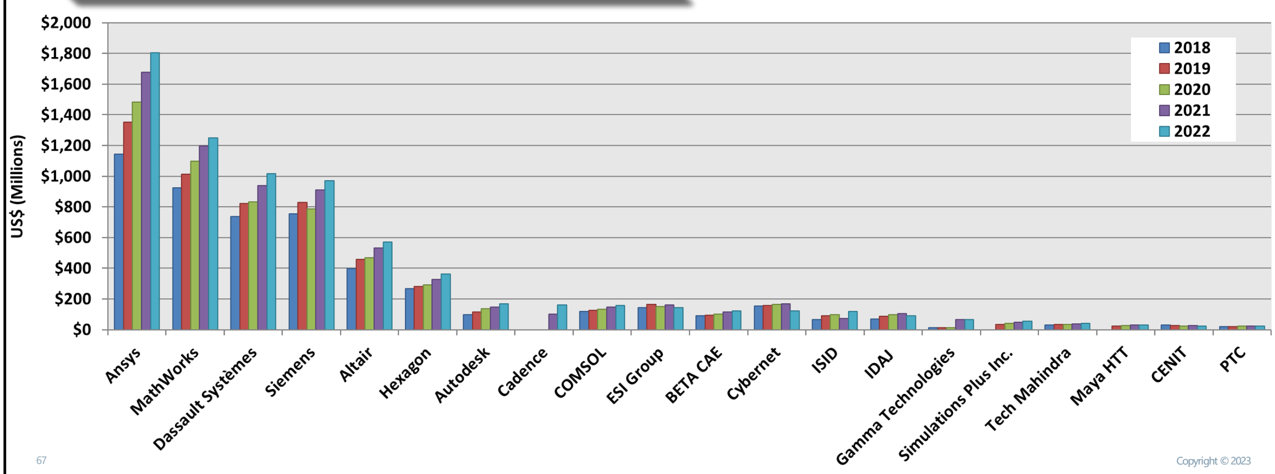
Leaders' revenue histories, moved some Ansys revenues to EDA segment

Revenues presented are CIMdata estimates



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Digital Manufacturing

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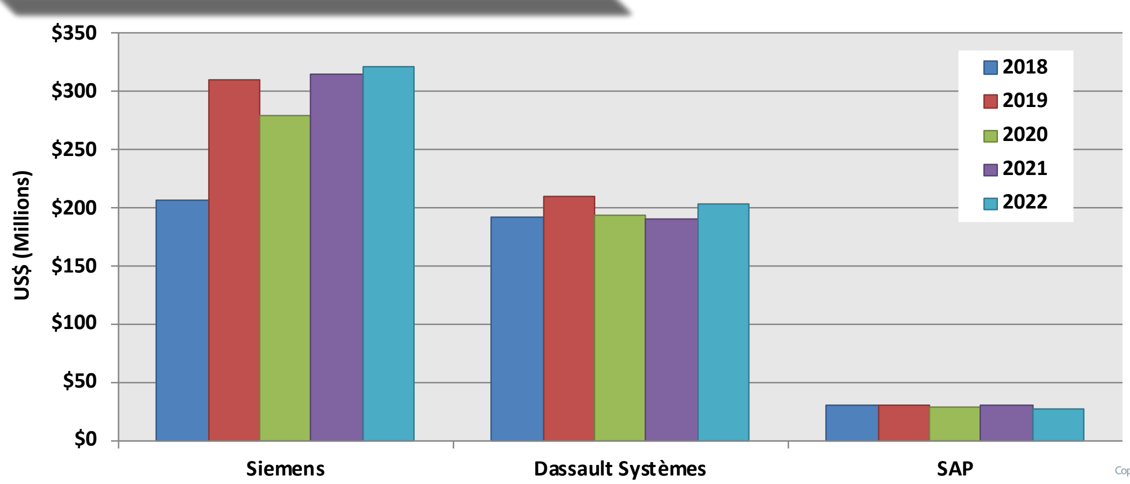
Leaders' revenue histories

Revenues presented are CIMdata estimates



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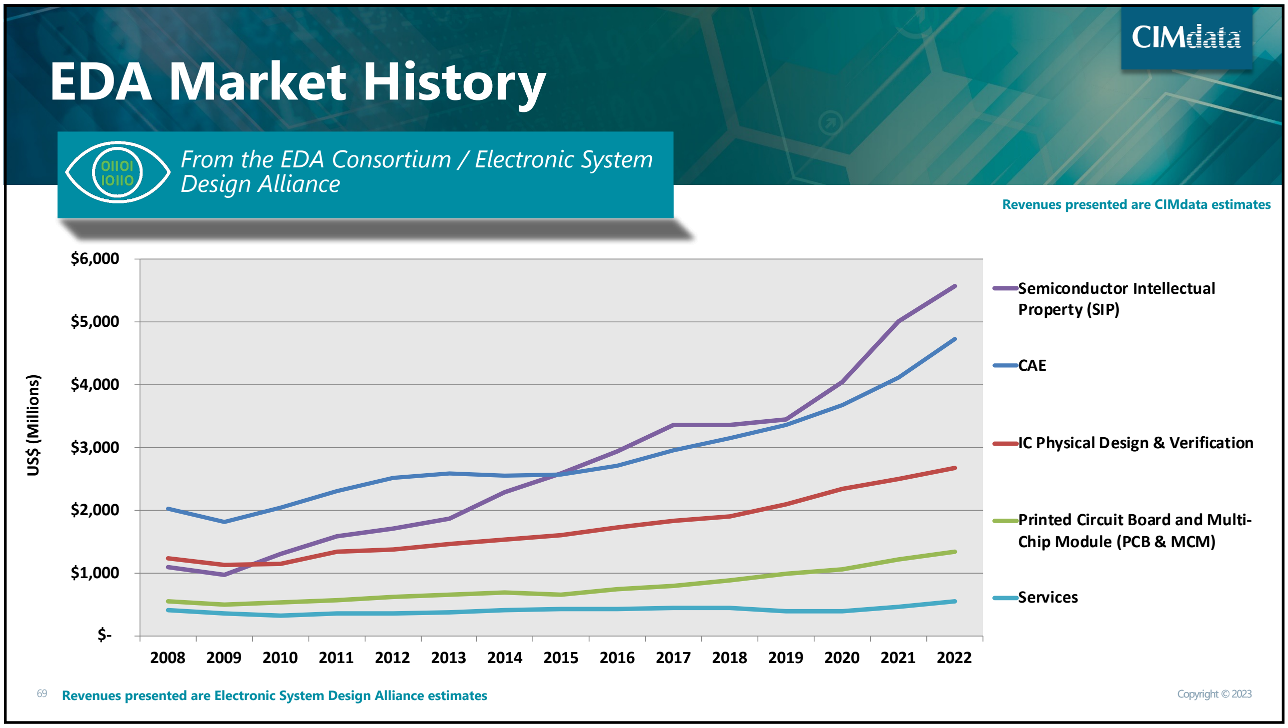

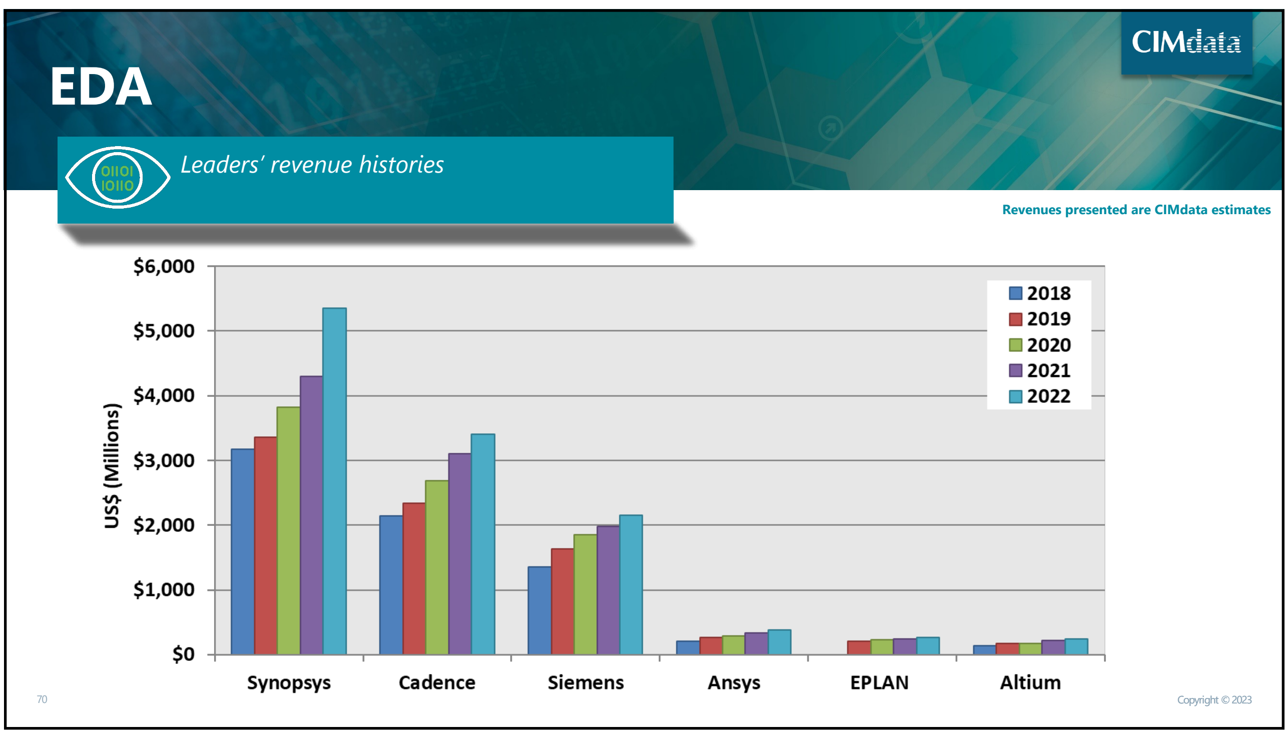

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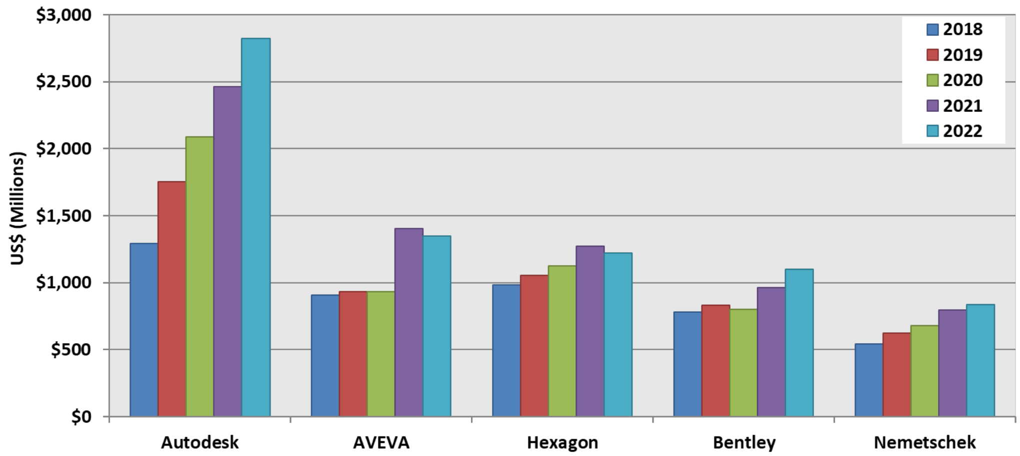
AEC

Leaders' revenue histories

Revenues presented are CIMdata estimates



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Agenda

- 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

- Lower than forecast, a lot of currency impacts
- Subscription can backstop 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
- Cloud interest and action seems to be at a tipping point
- Refresh programs continue, as suggested in recent CIMdata research

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The CIMdata PLM MAR Series

Major PLM Foresight deliverables, a growing Market Analysis Report (MAR) series (1 of 2)

- 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

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The CIMdata PLM MAR Series

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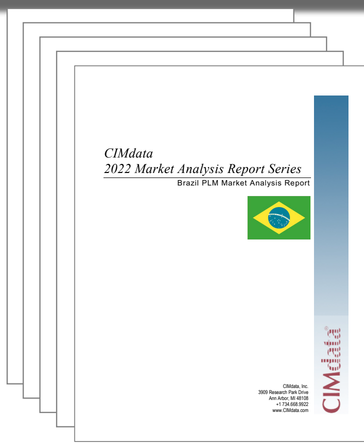
Major PLM Foresight deliverables, a growing Market Analysis Report (MAR) series (2 of 2)



- CIMdata China PLM MAR
- Country-specific reports for the following additional countries:
  - Brazil
  - France
  - Germany
  - India
  - Italy
  - Japan
  - Russia
  - South Korea
  - United Kingdom
  - United States

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The CIMdata CAM MAR

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32th annual report published in 2023—part of our CIM heritage

- CIMdata's long-running report on the Computer-Aided Manufacturing (CAM) market
- Part of CIMdata's CAM Service
- Report provides detailed statistics on SW spend, seat counts, app areas, etc.
- Delivered in two "drops"
  - Advance Packet – tables & charts contained in the report
  - CAM MAR – full report with market updates, commentary, etc.

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The CIMdata S&A MAR

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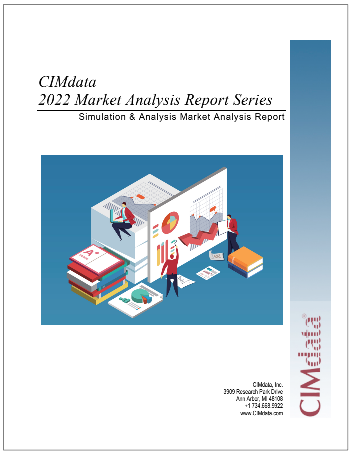
More fully leverages PLM MAR data, adds S&A specific content



- Expanded coverage of S&A market
- MAR contains S&A market data
  - Company size
  - Software and service delivery
  - By industry
  - By geography / country
- Includes qualitative section on Top 10 S&A solution providers
- Also includes end user research based on Collaborative Research program

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Questions & Answers

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What's on your mind?

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