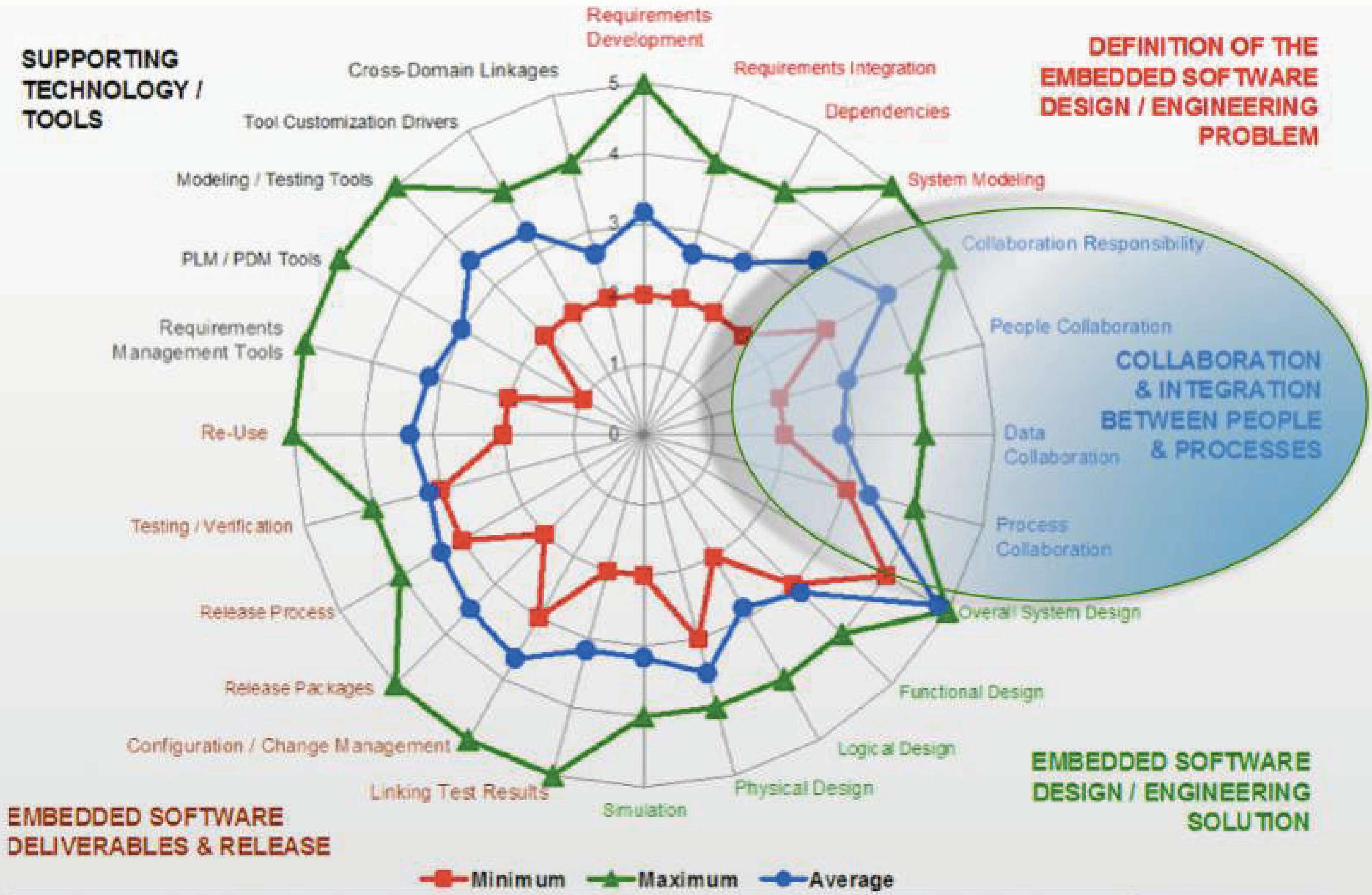
Extracts of CIMdata’s 2013 PLM Market & Industry Forum

Recognized for many years as the best source of comprehensive and accurate insights into the evolution and directions of the PLM industry, CIMdata’s annual PLM Global Market Analysis is first presented at this Market and Industry Forum. CIMdata will present and discuss its analysis of the PLM market, including 2012 PLM market revenues and our forecasts of the future from multiple perspectives. This includes a review of industrial investments in various key PLM functional domains, major industries, and geographic regions. In particular, CIMdata provides insights into each sector and its dynamics, as well as analyzing sector revenue results for solution providers

http://frederic.segonds.free.fr

Collaboration is an SE Weak Link

Survey highlighting key areas for improvement



Collaborative Product Development

Presenting new ways to develop products

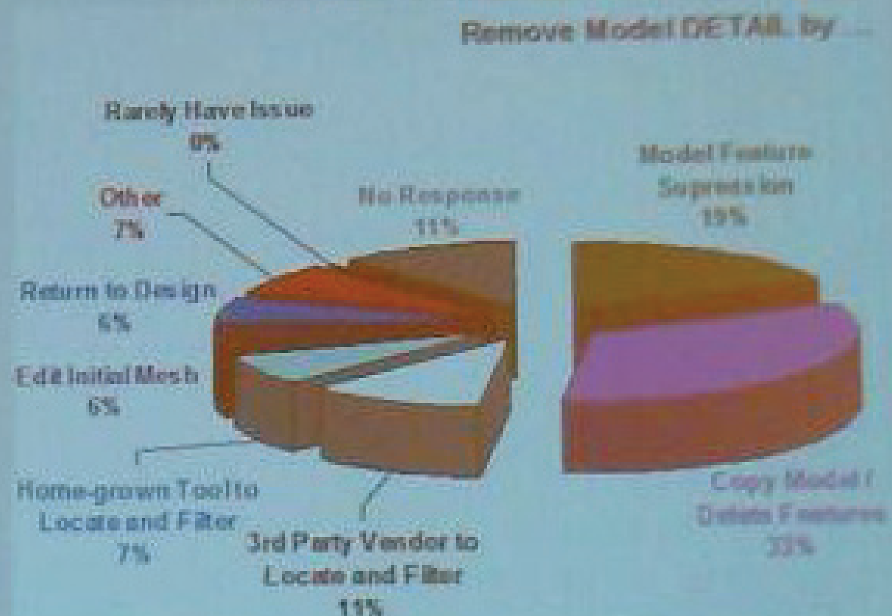
- People working together in real-time
- Always-on communication
- Finding and pulling needed information in small batches—as required
- Building knowledge about the product, synchronously as a team
- People working in different locations but functioning as a co-located team
- Interacting with customers, suppliers and team members
- Working from mobile devices

Direct Modeling Benefits

For the non-CAD expert

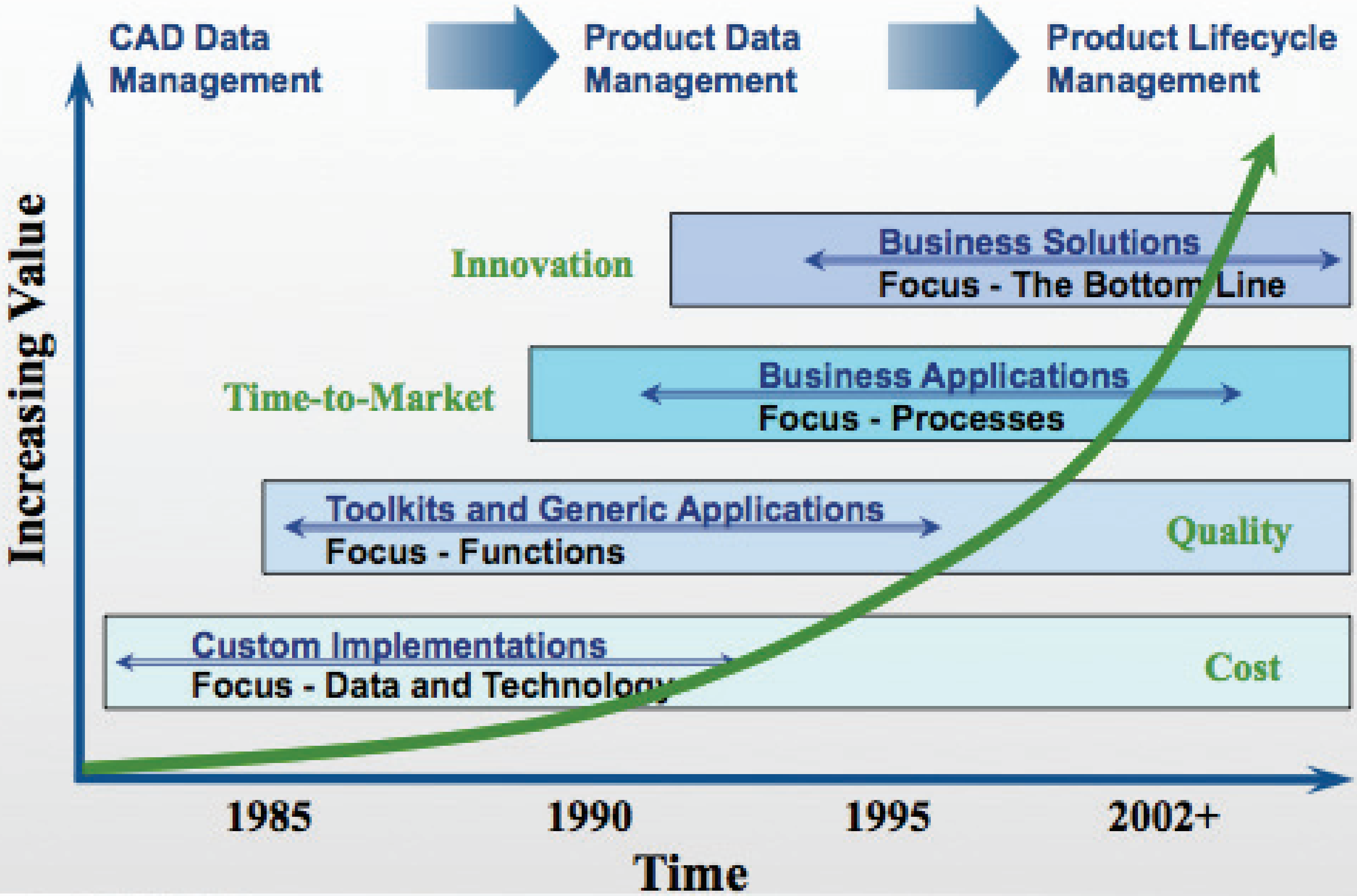
- No need to understand history
  - Dramatically reduces user interface complexity
  - Limits changes to the model and downstream to "what you see is what you get"
- IMPACT
  - CAE Analyst
    - More likely to make model changes themselves
    - Vendors now providing expanded solutions
    - Driving a process change
- Decision making
  - Where, when, and who changes model
    - Faster decisions
    - More time to do added simulations

2008 CPDA Report



The Evolution of the Market

Evolving to a collaborative backbone driving innovation



2012 PLM Market – Overall State

PLM market—slowed growth, but market up for the year (1 of 2)

- The global PLM market in 2012 exceeded CIMdata forecasts
  - Comprehensive PLM up 11.3% to $33.3 billion*
  - Mainstream PLM grew 12.1% to $21 billion
  - cPDm sector @ $11B (9.9%), services grew slower than software
  - Tools sector @ $21.4B (12.1%), S&A up higher than the overall tools
  - Digital Manufacturing sector @ $550M (10.2%), reached double-digit growth
- Market growth slowed in Q3 and Q4
  - Slow down, for the most part, was across the board

- What does 2012 tell us about 2013 & beyond?
  - Will license growth should lead to services and maintenance growth?
  - Has the global economic hangover eventually caught up to PLM?
  - Has CAD reach a new normal of slowed growth?

*organic and non-organic growth included

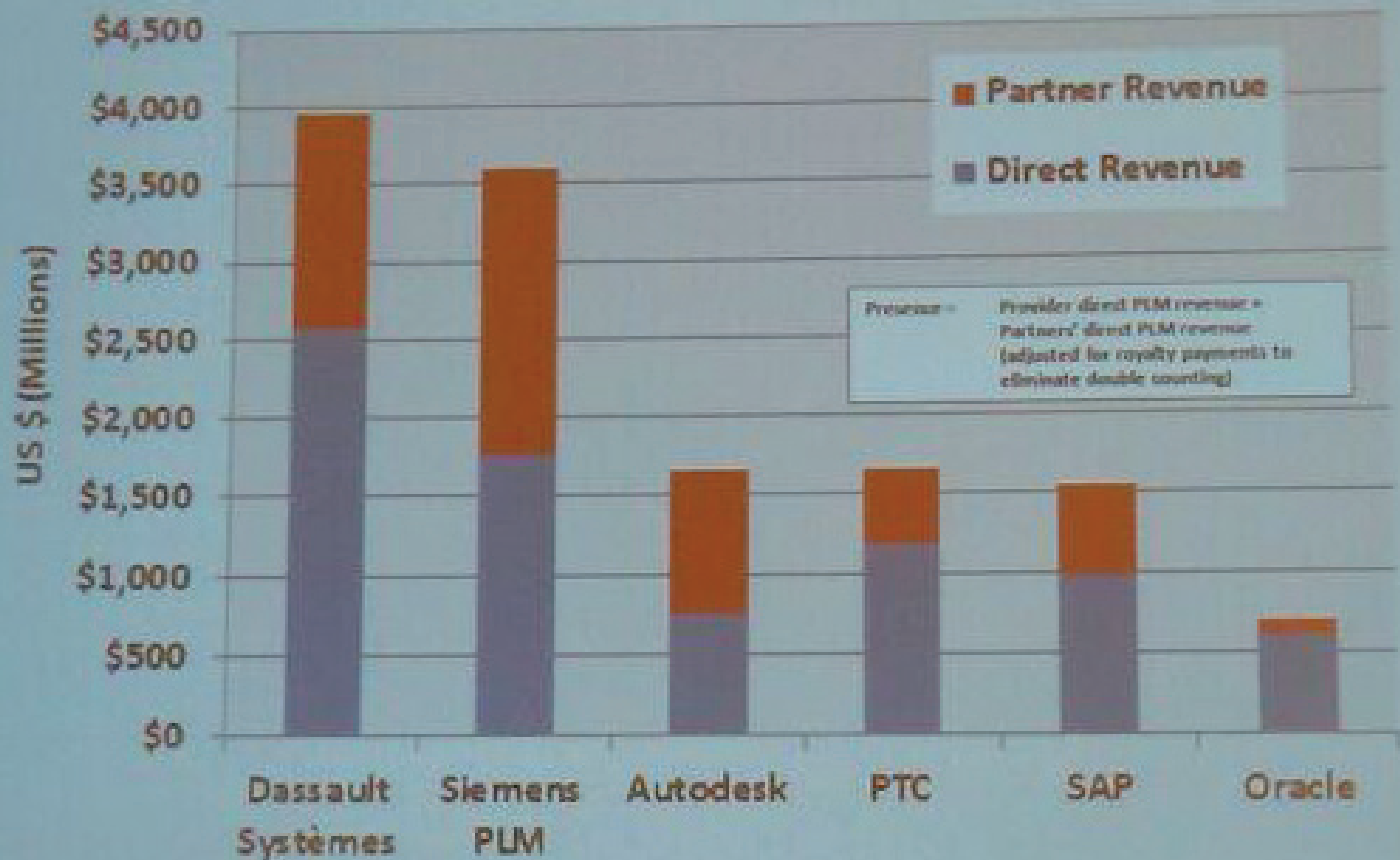
Revenue Ratios – Software vs. Service

Services is a major revenue area

- Overall cPDm market: services are 57.6%
  - Driven by independent services providers
- Comprehensive cPDm providers
  - In 2012, Software was 42% vs. 58% for Services
  - In 2011, Software was 41% vs. 59% for Services
- Focused application cPDm providers
  - Software is 77% - Services is 23%
- cPDm Systems Integrators, Resellers, VARs
  - Software was 9.4% - Services was 90.6%

2012 PLM Mindshare Leaders Presence

Mainstream PLM leaders' footprints in industry – heavily leveraging partners



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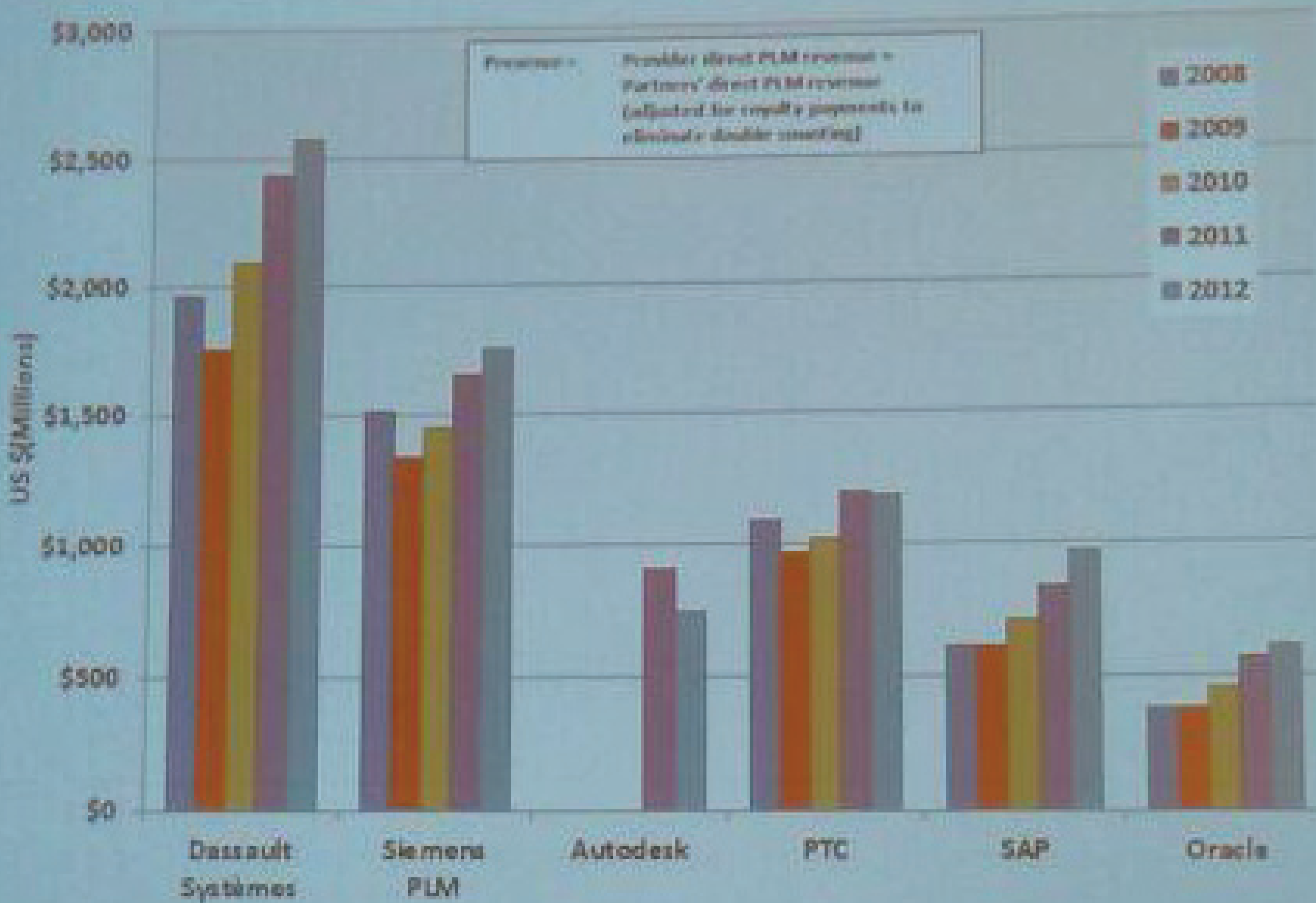
PLM Mindshare Leaders Revenue History

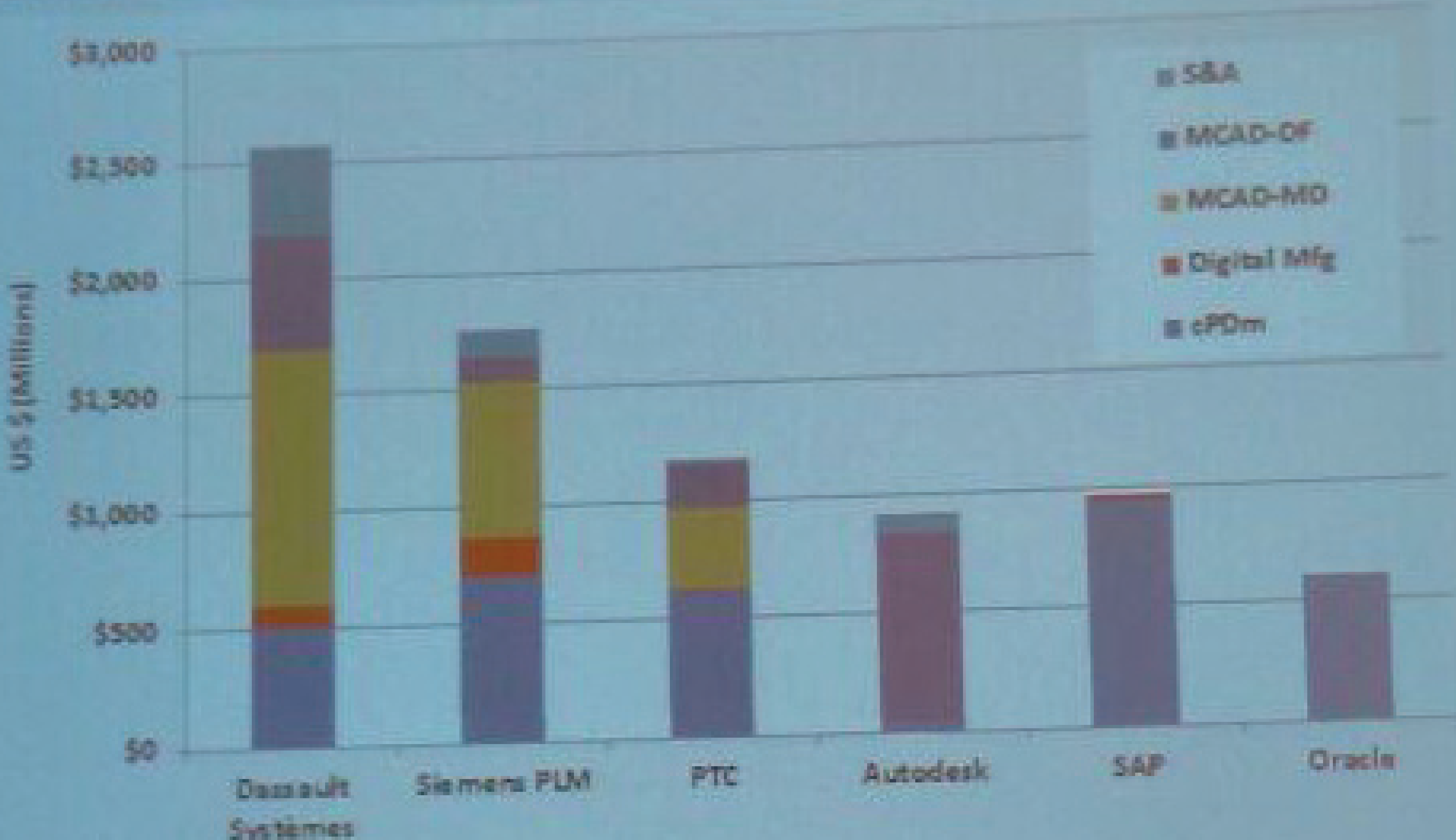
Mainstream PLM mindshare leaders' five year PLM direct revenue trends



Revenues presented are CIMdata estimates

2012 Mainstream PLM Leaders Revenue

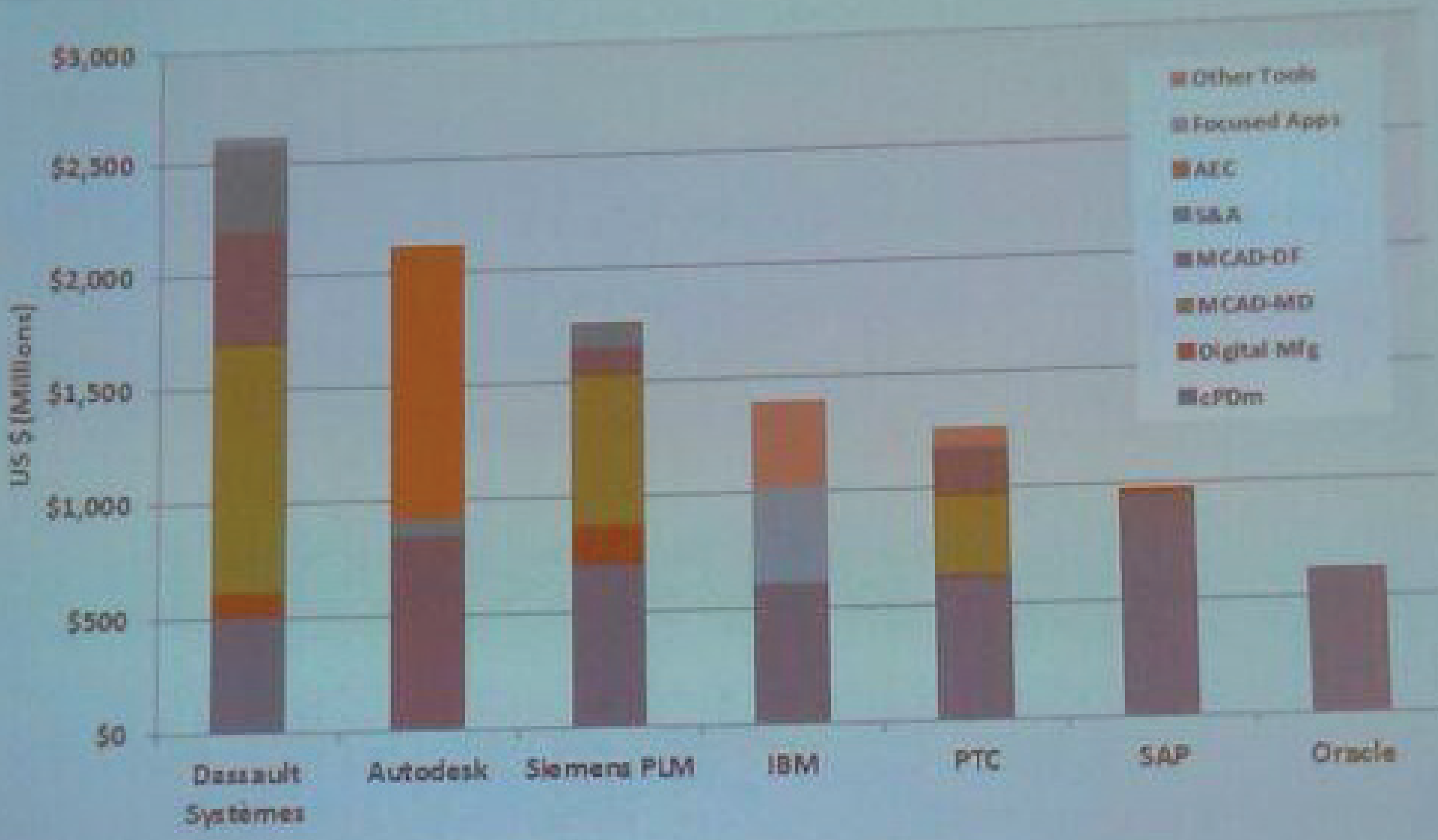
Leaders' direct revenues – led by providers of CAD tools



Revenues presented are CIMdata estimates

2012 Comprehensive PLM Leaders Revenue

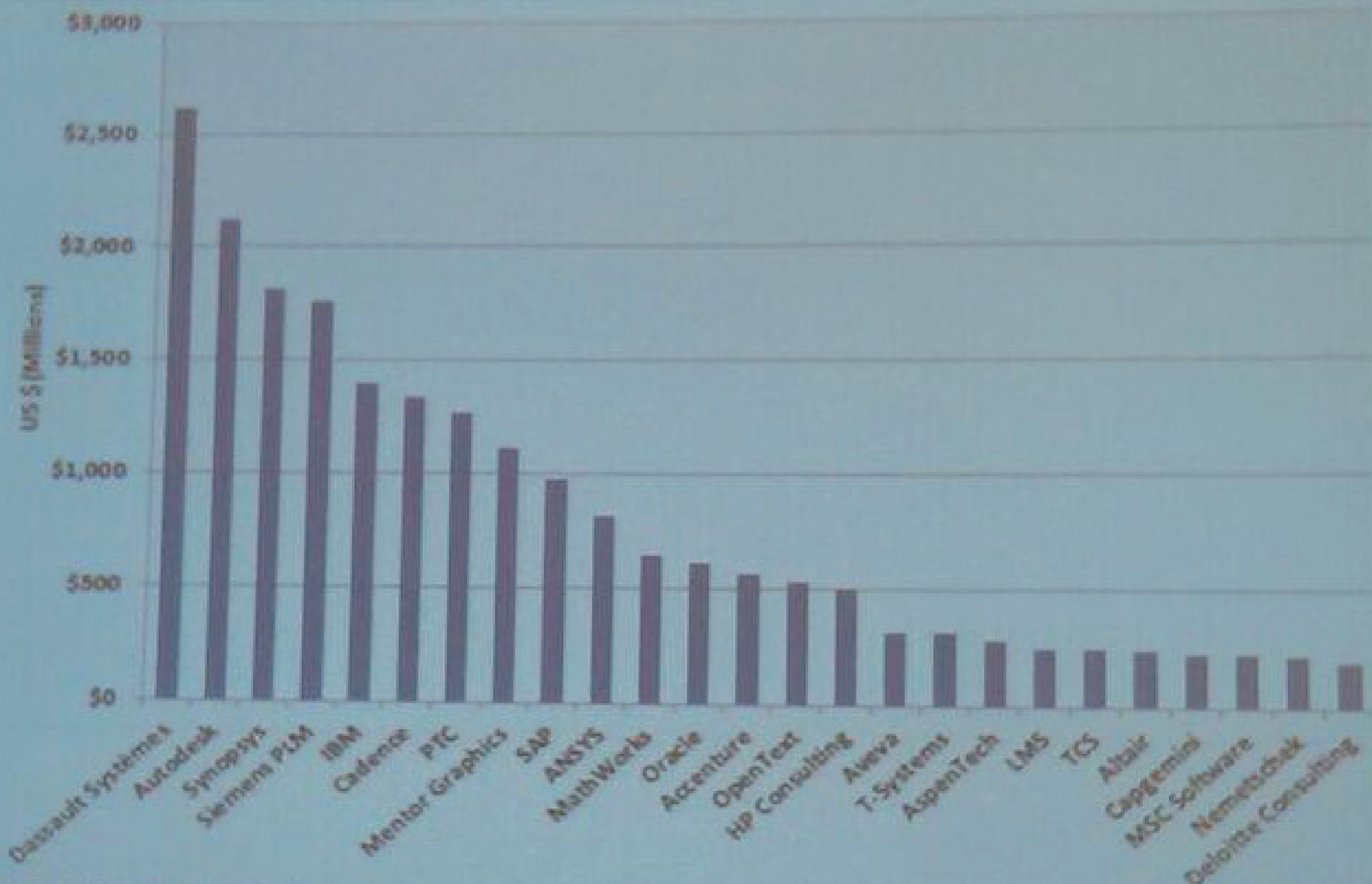
Leaders' direct revenues – led by providers of CAD tools



Revenues presented are CIMdata estimates

2012 Overall PLM Revenue Leaders

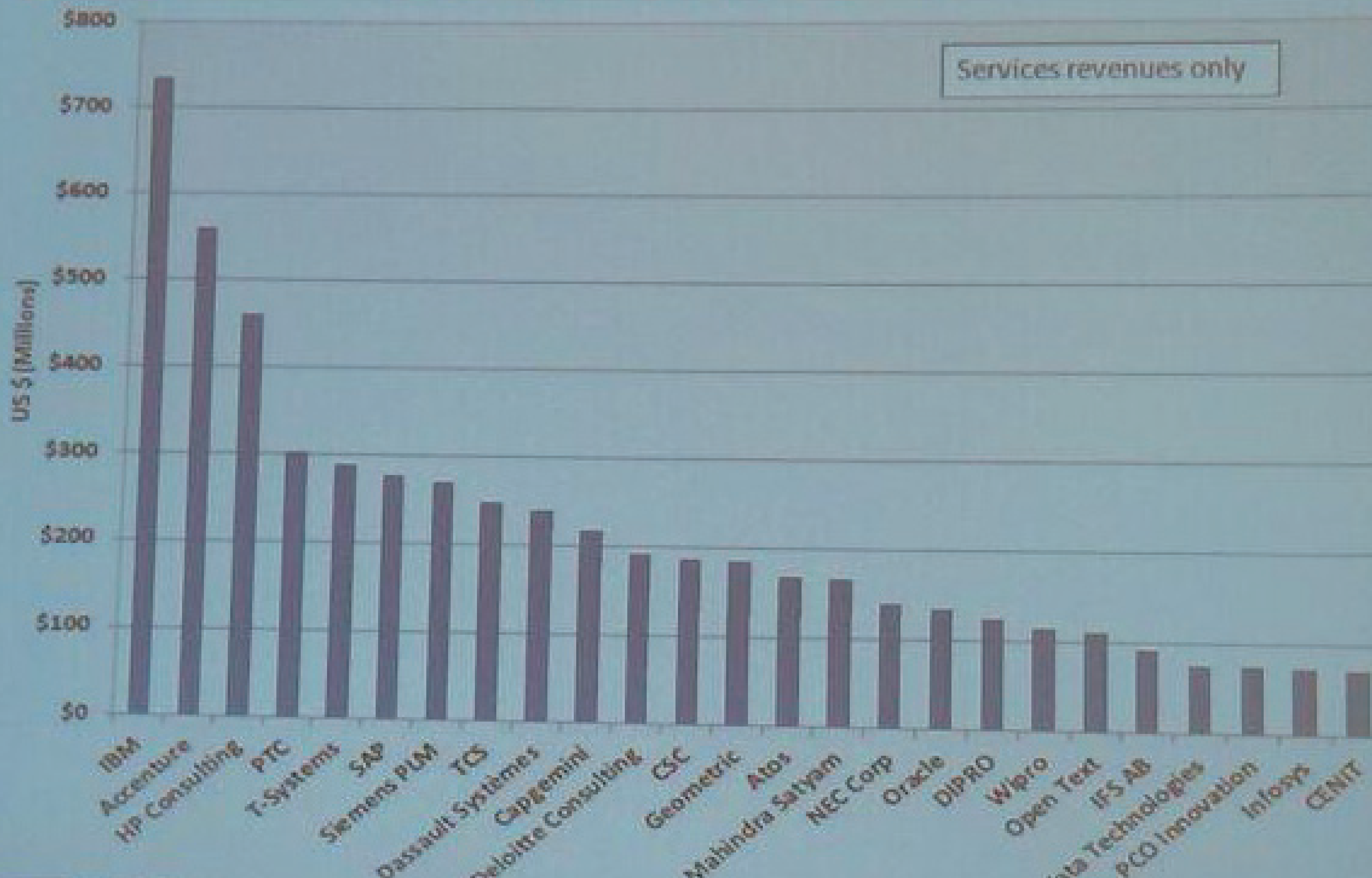
Many diverse companies generate PLM revenue



Revenues presented are CIMdata estimates

2012 PLM Services Revenue Leaders

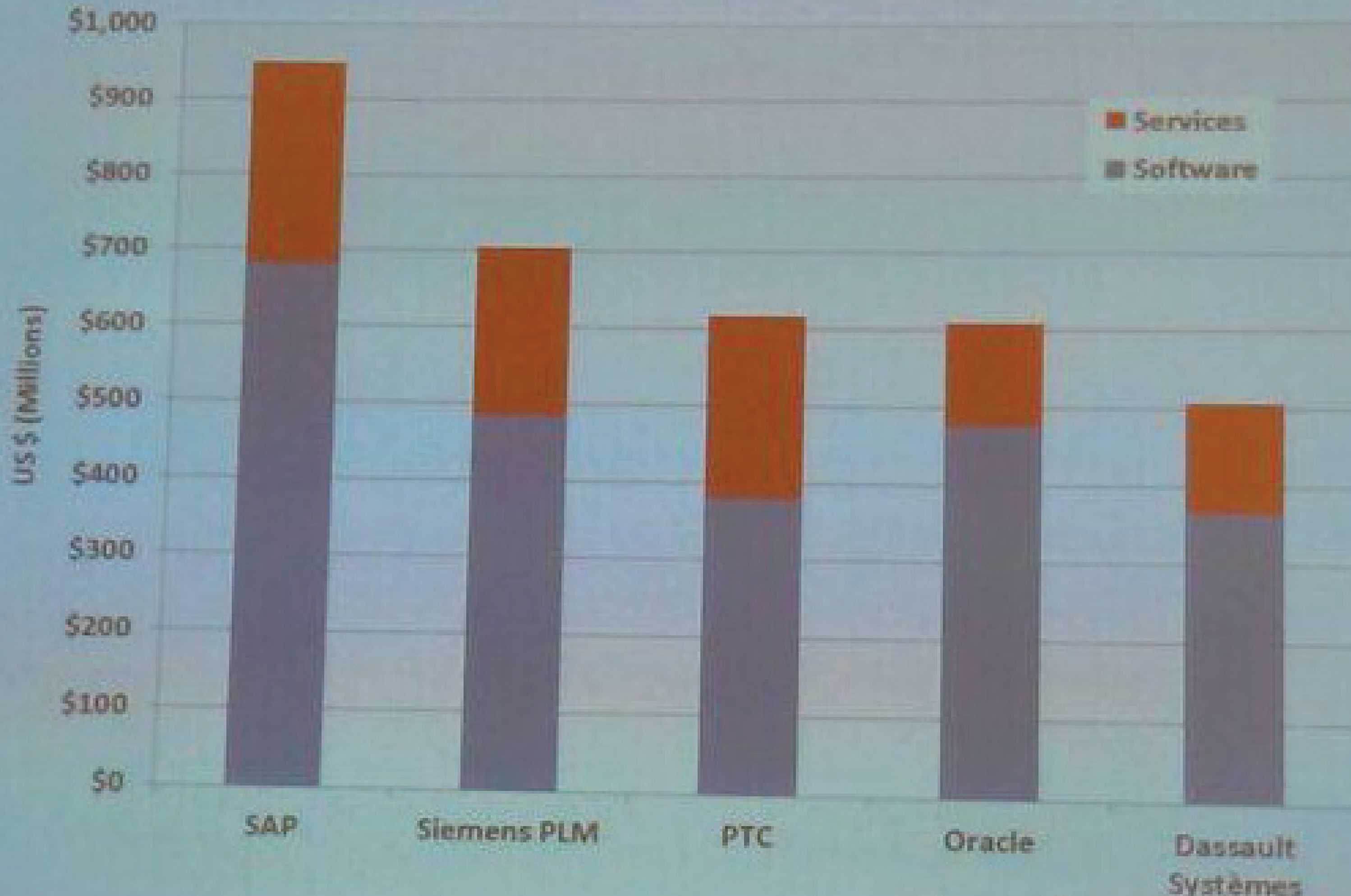
Solution providers have growing services organizations



Revenues presented are CIMdata estimates

2012 cPDm Leaders Direct Revenue

Software provides the majority of revenue



Revenues presented are CIMdata estimates.

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

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