

2008 CIMdata PLM Market Analysis

Module 1—Table of Contents

About CIMdata		ii
1.0 Executive Summary		1
2.0 Market Definition and Segmentation		6
2.1 Market Definition		6
2.2 Sub-Categories of the PLM Market		6
2.3 Consolidated PLM Markets		9
3.0 PLM Industry Review and Trends		11
3.1 The Growing PLM Economy		12
3.2 Evolution of the Enterprise IT Infrastructure		15
3.3 Expansion of the PLM Footprint		20
3.3.1 <i>Digital Manufacturing</i>		21
3.3.2 <i>PLM and Automation</i>		24
3.3.3 <i>Enterprise Simulation Management</i>		27
3.3.4 <i>Systems Engineering</i>		31
3.3.5 <i>Mechatronics</i>		32
3.3.6 <i>Service After Sales</i>		34
3.3.7 <i>Requirements Management</i>		35
3.3.8 <i>Strategic Product Planning—Product Portfolio Management</i>		36
3.3.9 <i>Program Portfolio Management</i>		37
3.3.10 <i>Recipe/Formula Management</i>		38
3.3.11 <i>Compliance Management</i>		38
3.3.12 <i>Asset Management within Discrete Industries</i>		39
3.4 Summary		40
4.0 PLM Market Analysis		42
4.1 Measuring the PLM Market		42
4.2 2007 PLM Review		43
4.2.1 <i>2007 PLM Market—Results and Forecast</i>		43
4.2.2 <i>2007 PLM Geographic Analysis</i>		48
4.2.3 <i>CIMdata Additional Comments</i>		50
4.3 2007 cPDM Segment of the PLM Market		50
4.3.1 <i>2007 cPDM—Results and Forecasts</i>		51
4.3.2 <i>Comprehensive cPDM Suppliers—Results and Forecasts</i>		55
4.3.3 <i>SIs, Resellers, and VARS—Results and Forecasts</i>		55
4.3.4 <i>Focused cPDM Suppliers—Results and Forecasts</i>		56
4.3.5 <i>cPDM Mid-Market Review</i>		57
4.3.6 <i>Additional CIMdata cPDM Market Comments</i>		61
4.4 2007 Digital Manufacturing Segment of PLM Market		62
4.5 2007 Tools Segment of PLM Market		63
4.5.1 <i>2007 Tools—Results and Forecasts</i>		64
4.5.2 <i>Mechanical Computer-Aided Design (MCAD)—Results and Forecasts</i>		65
4.5.3 <i>Non-Bundled NC—Results and Forecasts</i>		69
4.5.4 <i>Simulation and Analysis (S&A)—Results and Forecasts</i>		71
4.5.5 <i>EDA—Results and Forecasts</i>		72
4.5.6 <i>AEC—Results and Forecasts</i>		73
4.5.7 <i>Other Tools—Results and Forecasts</i>		74

5.0	Solution Supplier Analysis	75
5.1	Introduction to Competitive Landscape	75
5.2	PLM Mindshare Leaders Analysis	76
5.2.1	<i>Introduction to PLM Mindshare Leaders</i>	76
5.2.2	<i>PLM Mindshare Leaders' Market Presence</i>	78
5.2.3	<i>PLM Mindshare Leaders' Direct Revenues</i>	80
5.2.4	<i>PLM Mindshare Leaders' Direct Software-Only Revenues</i>	83
5.3	PLM Mindshare Leaders' Potential Expansion	84
5.4	Overall PLM Revenue Generators	86
5.5	Overall PLM Services Suppliers	87
5.6	2007 cPDM Supplier Analysis	88
5.6.1	<i>Overall cPDM Suppliers Analysis</i>	89
5.6.2	<i>Comprehensive cPDM Technology Suppliers Analysis</i>	92
5.6.3	<i>cPDM Systems Integrators, VARs, and Resellers Analysis</i>	101
5.6.4	<i>cPDM-Focused Application Suppliers Analysis</i>	107
5.7	2007 Digital Manufacturing Supplier Analysis	110
5.8	2007 Tools Supplier Analysis	112
5.8.1	<i>MCAD Suppliers Analysis</i>	112
5.8.2	<i>Non-Bundled NC Supplier Analysis</i>	113
5.8.3	<i>Simulation and Analysis Supplier Analysis</i>	114
Appendix A:	The Evolution of PLM	1
Appendix B:	Drivers for PLM Deployment	1
B.1	Faster Time to Benefits	1
B.2	Reducing Total Cost of Ownership	2
B.3	Increasing the Global Capabilities of PLM	2
B.4	Investments Focused on Business Performance	5
B.5	Managing Product and Plant Definition Information	5
B.6	Managing Methods and Processes	6

2008 CIMdata PLM Market Analysis

Module 2—Table of Contents

About CIMdata	ii
1.0 Introduction	1
2.0 Global Geographic Market Analysis	8
2.1 2007 PLM Global Results and Forecasts.....	8
2.1.1 <i>PLM Geographic Distributions and Forecasts</i>	8
2.1.2 <i>CIMdata Additional Comments</i>	9
2.2 2007 cPDm Segment Global Results and Forecasts.....	10
2.2.1 <i>2007 Overall cPDm—Results and Forecasts</i>	10
2.2.2 <i>CIMdata Additional Comments</i>	13
2.2.3 <i>cPDm Suppliers Geographic Revenue Distributions</i>	14
2.3 2007 Digital Manufacturing Segment Global Results and Forecasts.....	17
2.4 2007 Tools Segment Global Results and Forecasts.....	19
2.4.1 <i>2007 Overall Tools—Results and Forecasts</i>	19
2.4.2 <i>2007 Mechanical Computer-Aided Design (MCAD)—Results and Forecasts</i>	19
2.4.3 <i>2007 Non-Bundled NC—Results and Forecasts</i>	21
2.4.4 <i>2007 Simulation and Analysis (S&A)—Results and Forecasts</i>	21
2.4.5 <i>2007 AEC—Results and Forecasts</i>	22
2.4.6 <i>2007 EDA—Results and Forecasts</i>	23
2.4.7 <i>2007 Other Tools—Results and Forecasts</i>	23
3.0 Americas Region-Specific cPDm Analysis	24
3.1 2007 Americas cPDm—Results and Forecasts.....	24
3.2 2007 Americas cPDm Suppliers Analysis.....	26
4.0 EMEA Region-Specific cPDm Analysis	28
4.1 2007 EMEA cPDm—Results and Forecasts.....	28
4.1.1 <i>2007 EMEA cPDm—Results and Forecasts</i>	28
4.1.2 <i>2007 EMEA cPDm Suppliers Analysis</i>	31
4.2 2007 Central EMEA cPDm Results.....	34
4.3 2007 France cPDm Results.....	35
4.4 2007 United Kingdom cPDm Results.....	36
4.5 2007 Scandinavia cPDm Results.....	38
4.6 2007 Benelux cPDm Results.....	39
4.7 2007 Italy cPDm Results.....	40
4.8 2007 Spain cPDm Results.....	41
4.9 Rest of EMEA cPDm Results.....	42
5.0 Asia-Pacific Country-Specific cPDm Analysis	44
5.1 2007 Asia-Pacific cPDm Results.....	44
5.1.1 <i>2007 Asia-Pacific cPDm—Results and Forecasts</i>	44
5.1.2 <i>2007 Asia-Pacific cPDm Suppliers Analysis</i>	47
5.2 2007 Australia cPDm Results.....	50
5.3 2007 China cPDm Results.....	51
5.4 2007 India cPDm Results.....	52
5.5 2007 Japan cPDm Results.....	53
5.6 2007 South Korea cPDm Results.....	54
5.7 2007 Taiwan cPDm Results.....	55
5.8 2007 Rest of Asia-Pacific cPDm Results.....	56

6.0	Global Industry Market Analysis	58
6.1	2007 PLM Industry—Results and Forecasts	58
6.2	2007 PLM Segments—Results and Forecasts	60
6.3	2007 Overall cPDM Segment Results	64
6.3.1	2007 Overall cPDM—Results and Forecasts	64
6.3.2	Supplier Industry Analysis	68
7.0	Industry-Specific cPDM Analysis	74
7.1	2007 Aerospace and Defense cPDM Results	74
7.1.1	Industry Overview	74
7.1.2	2007 cPDM—Results and Forecasts	76
7.2	2007 Automotive and Other Transportation cPDM Results	78
7.2.1	Industry Overview	78
7.2.2	2007 cPDM—Results and Forecasts	79
7.3	2007 Electronics/Telecommunications cPDM Results	81
7.3.1	Industry Overview	81
7.3.2	2007 cPDM—Results and Forecasts	85
7.4	2007 Fabrication and Assembly cPDM Results	86
7.4.1	Industry Overview	86
7.4.2	2007 cPDM—Results and Forecasts	88
7.5	2007 Process-Packaged Goods cPDM Results	89
7.5.1	Industry Overview	89
7.5.2	2007 cPDM—Results and Forecasts	90
7.6	2007 Process-Petrochemical cPDM Results	91
7.6.1	Industry Overview	91
7.6.2	2007 cPDM—Results and Forecasts	92
7.7	2007 Utility Industries cPDM Results	94
7.7.1	Industry Overview	94
7.7.2	2007 cPDM—Results and Forecasts	95
7.8	2007 Construction, Infrastructure, and Shipbuilding cPDM Results	97
7.8.1	Industry Overview	97
7.8.2	2007 cPDM—Results and Forecasts	97
7.9	2007 Other Industries cPDM Results	99
7.9.1	Industry Overview	99
7.9.2	2007 cPDM—Results and Forecasts	99