About the CIMdata PLM Market Analysis Report Series

The CIMdata PLM Market Analysis Report (MAR) Series is a set of related reports that serve to document CIMdata’s analysis of the product lifecycle management (PLM) market. The 2019 report series documents CIMdata’s analysis of the global PLM market results for the 2018 calendar year. The CIMdata PLM MAR series includes:

**CIMdata 2019 Executive PLM Market Report**
Provides an overview of CIMdata’s complete global analysis. Includes key charts on PLM market investment statistics through 2018, 5-year forecast of investments through 2023, and a summary of PLM solution providers’ performance in 2018.

**CIMdata 2019 PLM Industry Review and Trends Report**
Mainly qualitative in nature; focuses on key issues facing the global PLM ecosystem of solution providers and end user organizations. Highlights changes that occurred in 2018, what effects those changes may have in the short and medium term, and what is on the horizon in the years to come.

**CIMdata 2019 PLM Market and Solution Provider Analysis Report**
Details measures of and forecasts for the overall PLM market, and key segments including tools, collaborative Product Definition management (cPDm), and digital manufacturing. The tools section has additional details on sub-segments including MCAD, CAM, S&A, EDA, and AEC; also includes CIMdata’s estimates of PLM solution provider revenues for 5 years.

**CIMdata 2019 PLM Market Geographic Analysis Report**
Provides another view of the 2018 market results, by major geography. CIMdata's 2019 estimates and market forecasts for PLM and the major PLM market segments are provided for the Americas, EMEA, and Asia-Pacific. In addition, includes estimates and forecasts for the cPDm segment within specific European and Asia-Pacific countries and regions.

**CIMdata 2019 PLM Market Industry Analysis Report**
Provides another view of the 2018 market results, by industry segment. CIMdata’s 2019 estimates and market forecasts for PLM and cPDm are provided for eight different industry sectors: aerospace and defense; automotive and other transportation; electronics/telecommunications; fabrication and assembly; process-packaged goods; process-petrochemical; utilities; and construction, infrastructure, and shipbuilding.

**CIMdata 2019 PLM Market Country Reports**
Provide country-specific views of the 2018 market results. Country reports are available for: Brazil, China, France, Germany, India, Italy, Japan, Russia, South Korea, United Kingdom, and the United States. The reports include estimates of spending by industry segment within each country, solution provider market presence within the country, growth of the top ten solution providers, revenue by
global mindshare leaders, market shares in each measured segment, and five-year forecasts.

**CIMdata 2019 Simulation & Analysis Market Analysis Report**
Details measures of and forecasts for the simulation and analysis (S&A) segment of the PLM market. The report also includes CIMdata’s overviews of leading S&A solution providers and estimates of S&A solution provider revenues by geography and industry for 2018.

**CIMdata 2019 Computer-Aided Manufacturing Market Analysis Report**
Provides information about the worldwide market for Computer-Aided Manufacturing (CAM) software products and services during 2018. The report includes market size in terms of expenditures by user companies for CAM software products and related services, analyses of various technical aspects concerning the industrial use of CAM software and techniques, trends in the CAM software industry, market share of CAM providers by various measurements, reseller revenues, and other information related to CAM software providers.
# Table of Contents

About the CIMdata PLM Market Analysis Report Series .......................................................... i
Table of Contents ......................................................................................................................... iii
Index to Figures ............................................................................................................................ iv
Index to Tables ............................................................................................................................. v
Introduction ...................................................................................................................................... 1
Market Definition ............................................................................................................................ 4
   PLM Solution Market Segments ................................................................................................. 5
PLM Market Analysis ....................................................................................................................... 6
   Measuring the PLM Market .......................................................................................................... 6
   The Effect of Exchange Rates ...................................................................................................... 7
   Update on Mergers and Acquisitions (M&A) ............................................................................. 8
   Measuring PLM Market Growth .................................................................................................. 9
Forecast Assumptions ..................................................................................................................... 10
Simulation and Analysis Segment of the PLM Market ................................................................. 12
   Trends Impacting the S&A Market .............................................................................................. 12
      Overview ................................................................................................................................... 12
   Segmenting the S&A Market ....................................................................................................... 14
   Technology Trends in the S&A Market ....................................................................................... 16
      Overview ................................................................................................................................... 16
      PLM Integration and Product Innovation Platforms ................................................................. 17
      Digitalization and PLM .............................................................................................................. 24
      Digital Thread and Digital Twin ................................................................................................. 25
      Model-Based Systems Engineering ......................................................................................... 27
      Physics-Based System Simulation and Co-Simulation .............................................................. 36
      Data and Model Interoperability Standards ............................................................................ 36
      Simulation Process & Data Management .................................................................................. 40
      Simulation, Analysis & Validation Governance ....................................................................... 41
      Cloud Computing and Software as a Service (SaaS) ................................................................. 43
      Generative Design ..................................................................................................................... 44
      The Democratization of Simulation ......................................................................................... 47
   Solution Providers Respond to the Demand .............................................................................. 49
      Comprehensive S&A Platforms ................................................................................................. 50
      Smaller but Key Emerging Players in MBSE ............................................................................ 52
Current CIMdata SDSD Consulting Practice Research ................................................................. 58
S&A Market—Results and Forecast ............................................................................................... 59
S&A Industry Analysis ................................................................................................................... 61
S&A Geographic Analysis ............................................................................................................. 62
Solution Provider Analysis ........................................................................................................... 67
The S&A Competitive Landscape ................................................................................................ 67
## Index to Figures

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CIMdata’s Product Innovation Platform Model</td>
</tr>
<tr>
<td>2</td>
<td>PLM Market Sub-Sector Sizes US$ (Millions)</td>
</tr>
<tr>
<td>3</td>
<td>PLM Market History and 5-Year Forecast</td>
</tr>
<tr>
<td>4</td>
<td>PLM: Connecting the Model-Based Domains Enables the Lifecycle Digital Thread</td>
</tr>
<tr>
<td>5</td>
<td>CIMdata’s Modeling &amp; Simulation Platform is at the Core of the Product Innovation Platform</td>
</tr>
<tr>
<td>6</td>
<td>Engineering Domains and Models are Loosely Connected Today Across the Enterprise Product Development Process</td>
</tr>
<tr>
<td>7</td>
<td>Key Elements of the Systems Modeling &amp; Simulation Platform</td>
</tr>
<tr>
<td>8</td>
<td>Key Capability Elements of CIMdata’s Enterprise Application Architecture (EAA) Model</td>
</tr>
<tr>
<td>9</td>
<td>Digital Twins Integrate Data with Engineering Models</td>
</tr>
<tr>
<td>10</td>
<td>Digitalization Enables Model-Based Systems Engineering Across the Entire Lifecycle</td>
</tr>
<tr>
<td>11</td>
<td>Complexity Issues Cut Across Industries</td>
</tr>
<tr>
<td>12</td>
<td>The Majority of Lifecycle Costs are Committed Early in Product Development Process</td>
</tr>
<tr>
<td>13</td>
<td>MBSE Links Requirements with the Model-Based Design and Engineering Domains</td>
</tr>
<tr>
<td>14</td>
<td>Engineering Domains are Supported by Many Overlapping MBSE Solutions</td>
</tr>
<tr>
<td>15</td>
<td>MBSE Emerging Standards Landscape</td>
</tr>
<tr>
<td>16</td>
<td>Business Value Comes with Adoption Maturity</td>
</tr>
<tr>
<td>17</td>
<td>Component Design Process</td>
</tr>
</tbody>
</table>

**S&A Providers Analysis**

- ANSYS ............................................................................................................ 73
- MathWorks ....................................................................................................... 76
- Dassault Systèmes ............................................................................................ 77
- Siemens PLM Software ....................................................................................... 80
- Altair .................................................................................................................. 84
- MSC Software (Hexagon MI) ............................................................................... 88
- ESI Group .......................................................................................................... 90
- Cybernet Systems ............................................................................................... 92
- Autodesk ............................................................................................................. 93
- Livermore Software Technology Corporation (LSTC) ...................................... 95
- BETA CAE Systems ............................................................................................. 96
- COMSOL Group .................................................................................................. 97
- Gamma Technologies .......................................................................................... 99

**Conclusion** .................................................................................................... 100

**About CIMdata** ............................................................................................... 100
Figure 18: Generative Design Process ................................................................. 45
Figure 19: S&A Revenue—History and Forecast .................................................. 60
Figure 20: Distribution of S&A Revenues US$ (Millions) .......................................... 60
Figure 21: History of S&A Revenues by Segment ................................................... 61
Figure 22: S&A Revenues by Industry Segment US$ (Millions) .............................. 62
Figure 23: History of S&A Revenues by Industry Segment ........................................ 62
Figure 24: Geographic Distribution of Worldwide S&A Revenues US$ (Millions) ........ 63
Figure 25: History of Geographic Distribution of Worldwide S&A Revenues ............ 64
Figure 26: Distribution of S&A Revenues within the Americas Region US$ (Millions) .... 64
Figure 27: History of Distribution of S&A Revenues within the Americas Region .......... 65
Figure 28: Distribution of S&A Revenues within the EMEA Region US$ (Millions) ....... 65
Figure 29: History of Distribution of S&A Revenues within the EMEA Region .......... 66
Figure 30: Distribution of S&A Revenues within the AP Region US$ (Millions) .......... 66
Figure 31: History of Distribution of S&A Revenues in the AP Region ...................... 67
Figure 32: PLM Leaders’ Revenue by Market Segment ......................................... 68
Figure 33: S&A Revenue Leaders ......................................................................... 70
Figure 34: S&A Leaders’ Revenue Histories ............................................................ 70
Figure 35: S&A Leaders Distribution US$ (Millions) ............................................... 71
Figure 36: S&A Leaders’ Software and Services Revenue ....................................... 71
Figure 37: S&A Leaders’ Revenues by Company Size US$ (Millions) ...................... 72
Figure 38: S&A Leaders’ Revenues by Geography ................................................ 72

Index to Tables

Table 1: Mapping the PLM Segments .................................................................. 6
Table 2: Average Exchange Rates for Currencies Used in the MAR ...................... 7