



BUSINESS SERVICES CATALOG

Cambashi is a leading global market research, industry analysis, consulting & training firm, focused on engineering and industrial software markets



TABLE OF CONTENTS

- Page 03 [About Cambashi](#)
- Page 04 [Why Cambashi](#)
- Page 05 [Our Industry Experts](#)
- Page 06 [Market Data](#)
 - Page 09 [Product / Country / Industry \(PCI\) Database](#)
 - Page 12 [Employment Observatory](#)
 - Page 15 [Industrial IoT/Connected Applications Observatory](#)
 - Page 18 [Building Information Modeling \(BIM\) Observatory](#)
 - Page 21 [Computer-aided engineering \(CAE\)/Simulation Observatory](#)
 - Page 24 [System Engineering and Embedded Software Observatory](#)
 - Page 27 [Manufacturing Operations Management \(MOM\) Observatory](#)
 - Page 30 [Methodology](#)
- Page 33 [Investor Tactical Support Service](#)
- Page 40 [Strategy & Planning Advisory](#)
- Page 42 [Industry Training](#)
 - Page 57 [Policies & Options](#)

ABOUT CAMBASHI

For over 35 years we have been providing in-depth market intelligence and analysis, either in the form of licensed data services or custom consultancy projects, based on our comprehensive, consistent and multi-perspective datasets. Our database contains detailed information on software investment by country, industry, and provider and on the size of potential user communities.

Global software companies rely on Cambashi for qualified, impartial intelligence for better plans & strategies and to align internal resources, capabilities, and product planning. We apply our extensive industry knowledge to each client's unique situation and datasets can be customized to reflect your view of the market.

Our research also informs our world-class online industry training courses, which provide a comprehensive introduction to manufacturing and related manufacturing industries.

WHY CAMBASHI

Cambashi's unique combination of industry analysis and marketing consultancy has enabled us to help hundreds of companies and organizations all over the world to evaluate and plan courses of action and to improve the resulting business outcomes. The combination of data and knowledge that we contribute to every project helps to ensure that our client's team is equipped with the information necessary to confidently make informed decisions.

A HIGHLY EXPERIENCED TEAM



Our consultants and analysts have held senior roles involving buying, selling, and implementing IT solutions in the industries that we serve, so we understand the mix of industry, business, marketing, sales, and IT

FLEXIBILITY AND ABILITY TO CUSTOMIZE THE PROJECT



We recognize that each client only wants to pay for what they specifically need from an external source, so engagements vary in size, scope, and structure, and are usually specific to the client.

AN EFFECTIVE MODEL



Our combination of industry analysis and consulting allows us not only to analyze but also to interpret data and deliver insights and concrete recommendations in the specific context of the client's business.

VALUABLE RESULTS



Concrete, tailored deliverables ensure that the results of our work are actionable in each client's situation, whether it's setting strategy, planning, communicating, executing, or refining the approach.

OUR INDUSTRY EXPERTS



Alan Griffiths

30 years experience providing IT solutions and advice to engineering & manufacturing enterprises



Ed Cordin

Two decades of experience, leading consulting, research, commercial due diligence, and go-to-market strategy



Simon Hailstone

Over 24 years in researching detailed BIM, PLM, CAE, CAD/CAM, MOM/MES, and IoT market data



Keith Henry

35 years in ICT & Information Advisory, supporting clients in competitive analysis and strategy development



Petra Gartzén

30 years experience providing market intelligence, insights and advice to business leaders



Peter Maskell

In-depth industry research, with Utilities and Automotive manufacture being key areas of responsibility



David Land

Specialising in data analysis and research into CAM, MCAE and Media & Entertainment



Dan Roberts

20 years experience providing BIM, ERP, MOM and PLM market intelligence and insights



Elena Priguza

Experienced in industry research and data analysis, as well as writing e-learning curriculum



Joe Brooker

Experienced in research and analysis of the benefits of using IT in value-adding industries worldwide

MARKET DATA

Cambashi Market Data provides businesses globally with the objective information needed to clarify decisions, assess trends and develop effective Go-to-Market strategies.

Each data set provides a different way of measuring the use of software in the industry and can be used in combination to support business planning at global, regional and local levels.

Access to all of Cambashi's datasets is flexible. Clients can focus their view of the data on the most important details by selecting the scope – either geographically (i.e. only including countries of interest) or by industry sector, product or provider.

Cambashi uses a combination of primary public sources, econometric forecasting, and its own expertise to analyze global software revenues.



ANALYZE RELATIVE MARKET SIZE AND SHARE

Cambashi Market Data provides insights that enable businesses to allocate budget and resources to implement sales and marketing strategies



IDENTIFY TRENDS AND RISKS

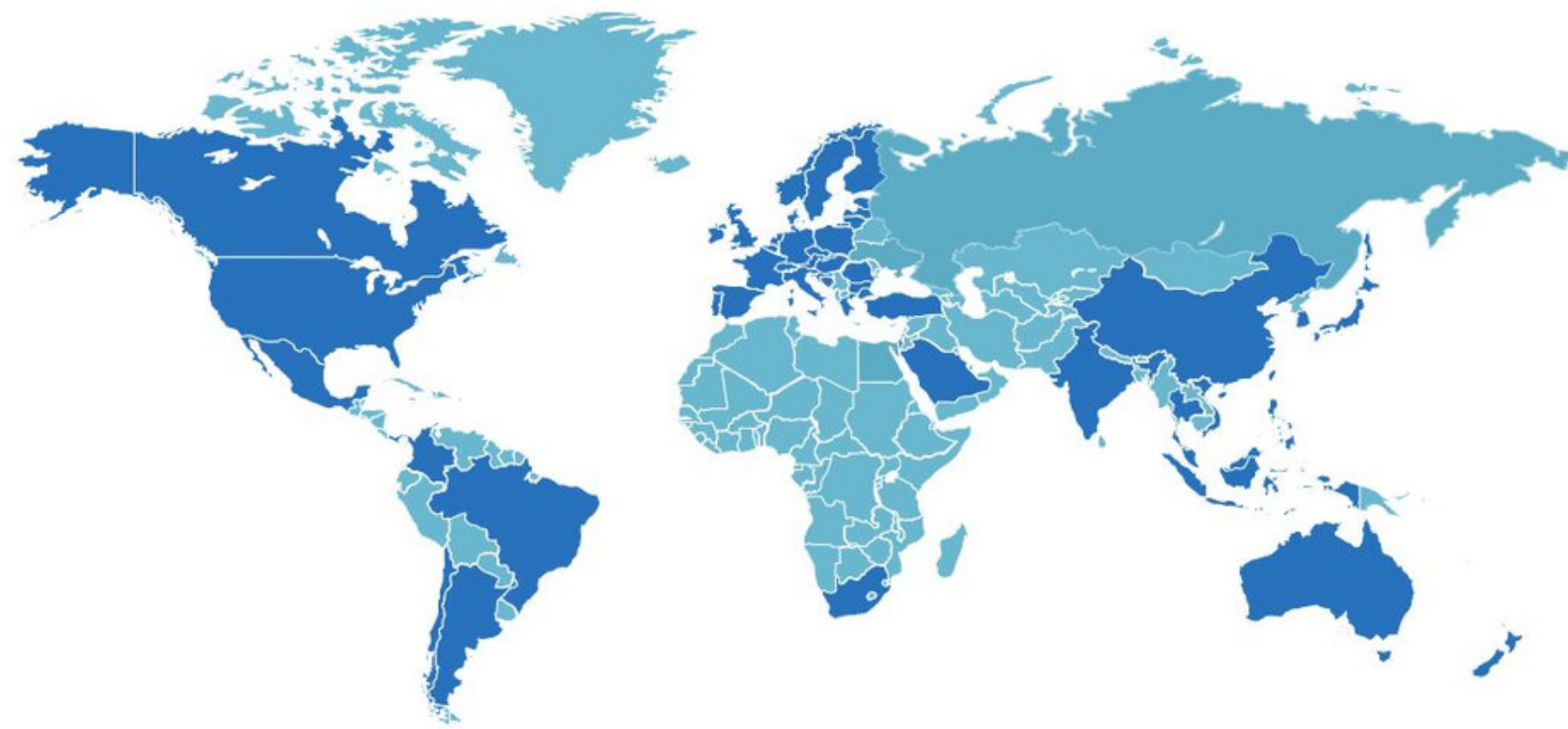


MEASURE COMPETITIVE PERFORMANCE



VALIDATE PARTNERS AND ACQUISITION TARGETS

GEOGRAPHIC COVERAGE



AMER – Americas region

- Brazil
- Canada
- Chile
- Colombia
- Mexico
- US
- Other countries_AMER

APAC – Asia, Pacific region

- Australia
- China
- Hong_Kong
- India
- Indonesia
- Japan
- Malaysia
- New_Zealand
- Philippines
- Singapore
- South_Korea
- Taiwan
- Thailand
- Vietnam
- Other countries_APAC

EMEA – Europe, Middle East, and Africa region

- Austria
- Belgium
- Bulgaria
- Croatia
- Czechia
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Israel
- Italy
- Latvia
- Lithuania
- Netherlands
- Norway
- Poland
- Portugal
- Qatar
- Romania
- Saudi_Arabia
- Slovakia
- Slovenia
- South_Africa
- Spain
- Sweden
- Switzerland
- Turkey
- UAE
- UK
- Other countries_EMEA

PRODUCT / COUNTRY / INDUSTRY (PCI) DATABASE

The Product / Country / Industry (PCI) database is a superset of multiple databases, allowing customers to tailor the data to support their individual planning requirements by creating customized extracts.

Revenues are segmented by country, as well as by industry sector (100+ sectors), and by type of software (e.g. BIM, GIS, etc.). The database covers 60 providers covering 132 products and monitors private companies that comprise the long tail of the market (1000+ providers).

Software Segment	Provider	Product	Industry	Country	GEO	Year
<ul style="list-style-type: none"> • Building Information Modeling (BIM) • Manufacturing CAD/CAM/CAE/PLM • Geographic Information System (GIS) • Media & Entertainment 	Ansys	Aconex	AEC	Argentina	<ul style="list-style-type: none"> • AMER (Americas) • APAC (Asia Pacific) • EMEA (Europe, Middle East and Africa) 	2018
	Autodesk	ArchiCAD	Aerospace and Defence	Australia		2019
	Aveva	AutoCAD Platform	Automotive	Austria		2020
	Bentley	CATIA	Consumer Goods	Belgium		2021
	Dassault	Creo	High Tech	Brazil		2022
	Hexagon	DELMIA	Machinery	Bulgaria		2023
	Nemetschek	ENOVIA	Process/Pharma	Canada		2024
	Oracle	Hexagon PPM	Public Sector	Chile		2025
	PTC	SIMULIA	Services	China		2026
	RIB	SolidWorks	Telecoms/Utilities	Colombia		
	Siemens	TeamCenter	Transportation	Croatia		
	Trimble	Workbench		Czechia		
	⋮	⋮	⋮	⋮		⋮

BENEFITS

- Accurate size and forecast by segment.
- Estimate relative market share.
- Run what-if scenarios to show risk exposure by industry or product type.
- Support regional planning and quarterly and year-end reporting.
- Measure performance relative to the market and competitive offerings.
- Identify specific industry sectors to target sales and marketing campaigns.
- Perform country-by-country comparisons to derive targets for sales & marketing initiatives.
- Account for currency differences between countries and regions.

RELEASE FREQUENCY

The Observatory is updated quarterly.

This data set is available as a "one off" or through an annualised subscription service.

Scope

The products available in the PCI Observatory cover a broad range of software segments.

AEC/BIM Products

- Architectural – Building design software.
- Structural – Structural design, detailing and analysis software.
- Civil – Software for the design and analysis of Civil infrastructure.
- MEP – Software for the design and analysis of “Mechanical, Electrical and Plumbing” aspects of a building or facility.
- Plant – Process plant, power plant, oil and gas, and shipbuilding design and analysis software.
- Construction – Collaboration, project management, data management, estimating and other software tools for the construction industry.
- Operate – Facilities management and operations software for buildings, infrastructure, and utilities.

Manufacturing/PLM Products

- MCAD – “Mechanical Computer Aided Design” for the design of mechanical components and products.
- MCAE – “Mechanical Computer Aided Engineering” for the analysis and simulation of parts, assemblies, and products.
- CAM – “Computer Aided Manufacturing” software for instructing manufacturing machinery to ‘make’ (e.g. cut, machine, drill, print) or otherwise produce parts and products.
- PLM – “Product Lifecycle Management” software for managing the entire lifecycle of a product from its conception, through design and manufacture, to servicing and disposal.
- ET – Electrotechnical or electrical engineering software.

Other technical software

- GIS – “Geographic Information System” software for capturing, managing, analysing, and displaying all forms of geographically referenced information.
- M&E – “Media & Entertainment” software for animation, modelling and rendering.

EMPLOYMENT OBSERVATORY

In addition to tracking technical software revenues, Cambashi also provides data on the potential users of technology through its Employment Observatory. Its scope extends to 150 occupations across 110 industries – in 59 countries worldwide.

Using nationally-reported data, combined with Cambashi intelligence on industry-wide activities, this is an invaluable tool for establishing market potential (Total Available Market) before developing and launching a new product or service.

56	3	123	112
Country	GEO	Occupation	Industry
Argentina Australia Austria Belgium Brazil Bulgaria Canada Chile :	<ul style="list-style-type: none"> • AMER (Americas) • APAC (Asia Pacific) • EMEA (Europe, Middle East and Africa) 	Architects Planners & Architects Planners & Designers Building, Craft, Machinery & Trades workers Engineers, :	Aerospace & Defence Automotive High Tech Consumer Goods Transportation Telecoms / Utilities / AEC Machinery :

BENEFITS

- Assess potential user base for a product or service aimed at particular occupations and industries.
- Visualise the demand for software applications by exploring the number of potential users in defined industry sectors and territories.
- Support market penetration by targeting specific user populations within an industry.
- Estimate total addressable market in terms of seats in support of a subscription revenue model.

RELEASE FREQUENCY

The Observatory is updated annually and released at the beginning of the year presenting aggregate employment figures across different industries, occupations, and various countries for that single “base year”.

This data set is available as a "one-off" or through a subscription service.

SCOPE

Cambashi Employment Observatory provides over 700,000 data points. Extensive research and data collection underpins the Employment Observatory. For each country, data on employment by industry, employment by occupation, and employment by both industry and occupation are researched. Data is collected and aggregated from a variety of sources including (but not limited to) national statistics agencies (e.g. 'Statistics Korea'), Eurostat, ILO and OECD.

To ensure a broad level of compatibility we use an industry and occupation coding system based on international standards:

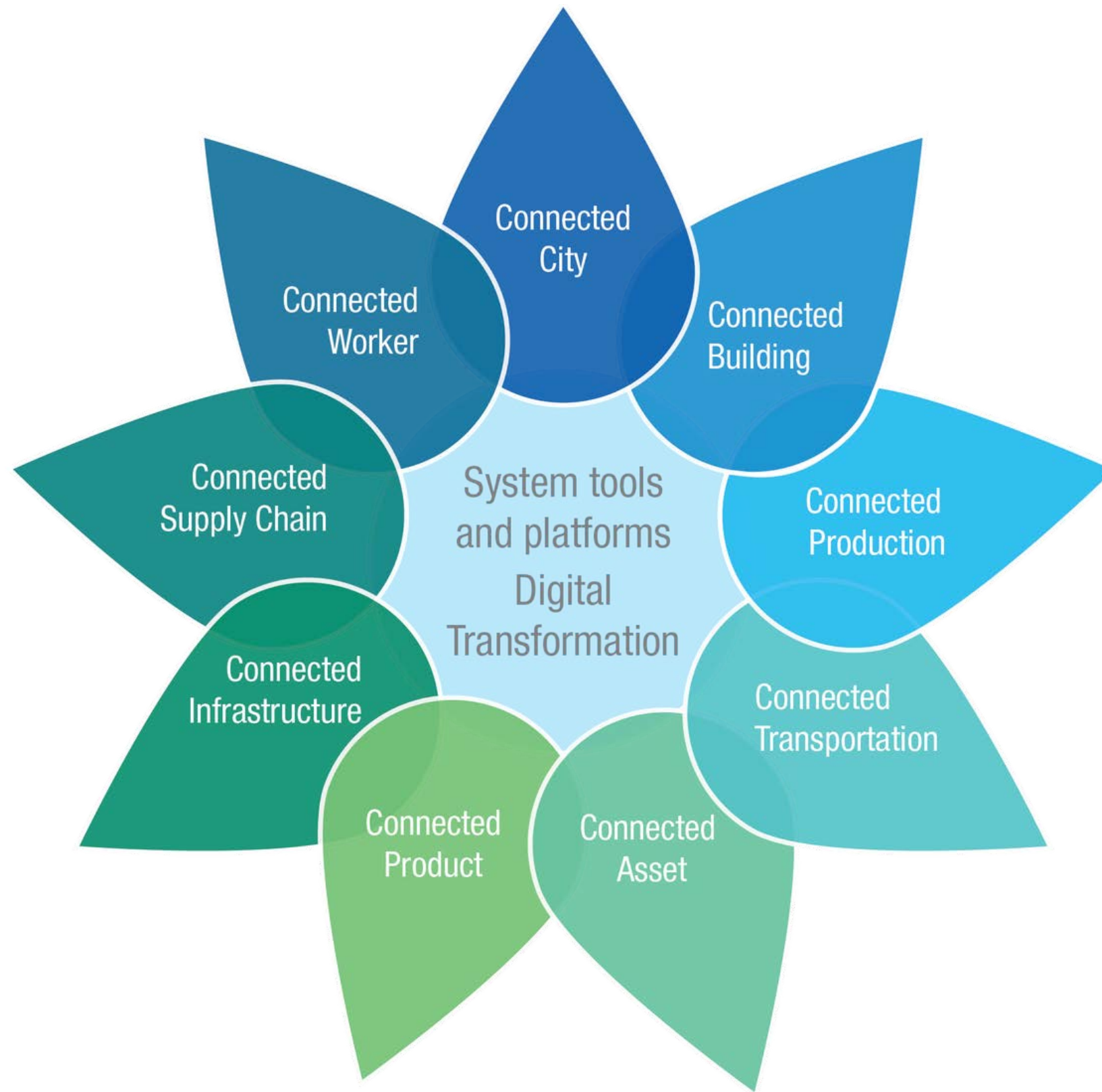
- International Standard of Industry Classifications (ISIC Rev.4)
- International Standard Classification of Occupations (ISCO 08)

To compile a complete and consistent Employment Observatory we extrapolate and interpolate data, using proxy substitution and other techniques.

INDUSTRIAL IOT / CONNECTED APPLICATIONS OBSERVATORY

The industrial IoT software market is of great interest to software providers and investors as it is growing quickly and beginning to mature. The route to market is through Connected Applications that often leverage AI (Artificial Intelligence), ML (Machine Learning) and Analytic capabilities, and the applications drive digital transformation. Yet the industrial IoT market is still in the formative stage led by approximately 20 large, global ‘enterprise’ software providers, and with a long tail of smaller suppliers; although ‘pure’ IoT technology providers are growing quickly, their market size is much smaller than providers from traditionally OT or IT backgrounds.

Connected Market	Provider	Provider Type	GEO	Year
Connected Asset	ABB	<ul style="list-style-type: none"> IoT Technology IT/Enterprise OT/Industrial Telecom 	<ul style="list-style-type: none"> AMER (Americas) APAC (Asia Pacific) EMEA (Europe, Middle East and Africa) 	2019
Connected Building	Amazon AWS			2020
Connected City	AT&T			2021
Connected Infrastructure	Bosch			2022
Connected Product	C3.ai			2023
Connected Production	Emerson			2024
Connected Supply Chain	GE Digital			2025
Connected Transportation	Hitachi			
Connected Worker	Honeywell			
	:			



The data in this Observatory tracks size and estimates growth of the market across three geographic regions: AMER, APAC and EMEA; and covers two views of the market:

- A revenue-based view of selected software providers
- A qualitative view based on case study analyses

BENEFITS

- Assess market size and opportunity
- Identify emerging trends and disrupters
- Optimize global sales and marketing resources
- Target the most promising geographic areas and market areas
- Assess comparative attractiveness of different Market Areas
- 3-year forecast (to 2024)

RELEASE FREQUENCY

The Observatory is updated on a yearly basis and released at the beginning of the year. This data set is available as a "one off" or through an annualised subscription service.

Scope

- The observatory includes software revenue for: MOM, IoT and applications, connected devices, high-level application groups (asset management, vehicle Solutions), mobility, industrial software, platform software, IoT related software.
- The revenue view covers providers classified into 4 major categories for 9 connected market areas in 3 major geographies (AMER, APAC, EMEA).
- Provider categories covered are: IoT Technology, IT/Enterprise, OT/Industrial, Telecom.
- Providers have been selected to be representative (exemplars) of the 9 connected market areas, across the 4 categories and across industries. They do not necessarily represent the top providers by revenue, geography or segment.
- The case study view covers the 9 connected market areas, 12 broad industry segments and 35 use cases.
- Revenue for OT/Industrial providers includes some areas of industrial production software such as MOM/MES. We include this as part of Connected Production.
- MOM includes; Design and Simulation, Manufacturing Execution Systems, Process Execution Systems and Operations Analytics.
- Revenues from embedded software, such as automotive engine management systems or building monitoring devices are out of scope. A more detailed description of individual provider scoping can be found in the 'Provider _ Scope' tab.

BUILDING INFORMATION MODELING (BIM) OBSERVATORY

Cambashi has a 30-year, proven track record in the provision of market numbers to the AEC/BIM Design industries.

Cambashi's BIM Observatory gives market planners the detailed view they need, enabling them to plan with precision, based on reliable datasets. Cambashi covers the full spectrum of the BIM market phases including Design, Construct and Operate.

59	3	40	72	3	7	9
Country	GEO	Provider	Product	BIM Phase	Segment	Year
Argentina	AMER	20-20	220-20	Design	Architecture	2019
Australia	(Americas)	Technologies	Commercial	Construction	Civil	2020
Austria		Accruent	20-20 Residential	Operation	Construct	2021
Belgium	APAC (Asia Pacific)	Archibus	Aconex		MEP	2022
Brazil		Asite	ADSK AutoCAD LT (AEC)		Operate	2023
Bulgaria	EMEA (Europe, Middle East and Africa)	AssetWorks	ADSK AutoCAD Platform (AEC)		Plant	2024
Canada		Autodesk	ADSK Building		Structural	2025
Chile		Aveva				2026
:		Bentley				2027
		:				
		:				

BENEFITS

The Cambashi BIM Observatory provides accurate, detailed, and consistent market numbers to support coordinated strategy and planning activities across the Design, Construct and Operate phases of BIM. This enables customers to:

- Forecast market demand by country.
- Perform country-by-country comparisons to derive targets for sales and marketing initiatives.
- Create a starting point for detailed investigations of one or more country markets.
- Account for currency differences between countries and regions.

RELEASE FREQUENCY

The Observatory is updated quarterly.

This data set is available as a "one-off" or through an annualized subscription service.

Scope

The Cambashi BIM Observatory covers the entire market for BIM Design, BIM Construct and BIM Operate products.

Design - includes all products used in the design stage of building and civil infrastructure projects. It includes the following sub-segments:

- Architecture - Architectural CAD software is used for the design of buildings.
- Structural - Structural CAD software includes both steel/rebar, concrete, and other structural detailing. Structural CAE software is used for the analysis of entire built structures or for the analysis of specific building components such as load beams.
- Civil - Civil CAD software is used for the design of roads, rail, bridges, utilities, and other infrastructure. CAE software is used for the analysis of civil engineering infrastructure such as bridges.
- MEP - MEP (Mechanical Electrical Plumbing) software is used for the design and analysis of mechanical, electrical, HVAC and plumbing systems in buildings.
- Plant - Plant software is used for the design and analysis of process plant facilities (such as chemical factories and petroleum refineries), shipbuilding, oil & gas facilities, and power stations.

Construct - Construct software includes a variety of tools including:

- Collaboration tools that aid project communication and coordination within design teams and between consultants, contractors, and clients.
- Data management tools that provide repositories and controls for digital assets and processes.
- Estimating tools to enable model-based estimating including quantity take-off.
- Surveying tools that provide site layout and modeling capabilities (excludes survey data capture and GIS tools).

Operate - includes Facilities Management and Operations software and tools used for the operation and maintenance of facilities in the built environment including buildings, infrastructure, utilities, and process plant. Activities include real estate management, space management, energy management, workplace and workforce management, analytics, and other activities related to maintenance. Activities specifically excluded include MRO (Maintenance, Repair, and Overhaul) for products (e.g. aircraft, industrial equipment), room, space, parking reservation, generic finance, and payment management.

COMPUTER-AIDED ENGINEERING (CAE) / SIMULATION OBSERVATORY

The CAE Observatory will allow market planners to use reliable and authoritative market data and impartial intelligence for better plans & strategies. The database covers globally detailed data on 480 vendors to inform decisions around partnership & acquisition strategies.

The Cambashi / IntrinSIM partnership is manifested in the CAE Observatory, which is based on several years of research and industry collaboration. The forecasts are derived from a combination of Cambashi analysis and econometric data from Oxford Economics.

The Observatory reports on 2D and 3D physics based, simulation/analysis software with detail on application, capability and industry.

BENEFITS

- Qualified, impartial intelligence for better plans & strategies
- Trusted global forecasts to align internal resources, capabilities, and product planning
- Insights on TAM (Total Available Market) size and the main growth areas.
- Detailed data on 480 vendors to inform decisions around partnership & acquisition strategies

480	14	11	8
Provider	Capability	Industry	Application
<ul style="list-style-type: none"> • Altair Engineering • ANSYS • Autodesk • AutoForm Engineering • Bentley Systems • BETA CAE Systems • COMSOL • Dassault Systemes • ESI Group • Gritec • Hexagon • MagmaSoft • MIDAS Information Technology • Nemetschek • Siemens Digital Industries Software • 	<ul style="list-style-type: none"> • Acoustics • Design Space Exploration / Simulation Automation (DSE/SA) • Electro-Magnetics (CEM) • Fluids (CFD) • Failure Modes • Manufacturing Processes • Multi-Body Dynamics (MBD) Kinematics • Multi-Physics • Optics • Plastics • Pre/Post • Simulation Data Management (SDM) • Structures (CSM) • Thermal 	<ul style="list-style-type: none"> • AEC • Aerospace and Defence • Automotive • Consumer Goods • High Tech • Machinery • Process/Pharma • Public Sector • Services • Telecoms/Utilities • Transportation 	<ul style="list-style-type: none"> • AEC/Civil • Biomedical • Process & Piping • Materials • Mechanical Product Design • Geophysical /Climate • Shipbuilding & Maritime • Vulnerability

RELEASE FREQUENCY

The Observatory is updated annually.

This data set is available as a "one-off" or through an annualized subscription service.

Scope

- The CAE Observatory was built in conjunction with industry specialists to help plan and develop the dataset, as well as contribute to research and validation. The data is based upon multiple sources and viewpoints of the market, the most important being primary research of vendors. The model feeds additional information and industry knowledge from other stakeholders and the Cambashi Market Observatories.
- The CAE software industry is constantly evolving. Due to mergers, acquisitions, and ongoing research, the list of included providers and products will change over time. This is a continual process.
- Forecasts and other data in this workbook are based on economic data from various sources and include content provided by Oxford Economics.

SYSTEM ENGINEERING AND EMBEDDED SOFTWARE OBSERVATORY

This data set looks at the growing market for tools used for systems engineering and the design, development and maintenance of embedded software.

The Cambashi System Engineering and Embedded Software Observatory provides revenue figures from research into over 300 companies, selling more than 500 software product lines.

Provider – Workflow

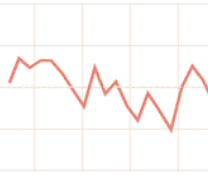
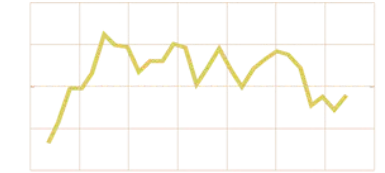
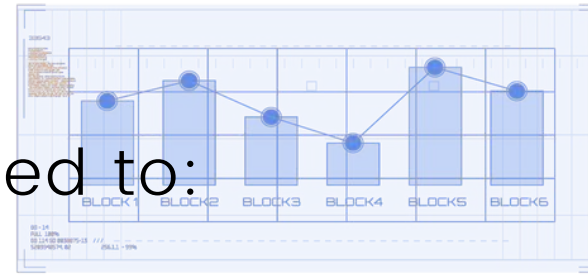
20	5	4	3
Provider	Workflows	Year	GEO
ARM	Implementation (IMP)	2016	<ul style="list-style-type: none"> • AMER (Americas) • APAC (Asia Pacific) • EMEA (Europe, Middle East and Africa)
Atlassian	Maintenance (MA)	2017	
Dassault Systèmes	Requirements (REQ)	2018	
dSpace	Systems Architecture (SYSARCH)	2019	
ETAS	Verification and Testing (V&T)		
Green Hills Software			
IBM			
Intel			
⋮			
⋮			

Country – Industry

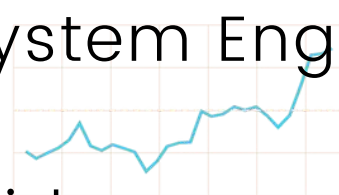
8	59	9	3
Industry	Country	Year	GEO
Aerospace & Defence	Argentina	2018	<ul style="list-style-type: none"> • AMER (Americas) • APAC (Asia Pacific) • EMEA (Europe, Middle East and Africa)
Automotive	Australia	2019	
High Tech	Austria	2020	
Consumer Goods	Belgium	2021	
Transportation	Brazil	2022	
Telecoms/Utilities	Bulgaria	2023	
AEC	Canada	2024	
Machinery	Chile	2025	
⋮	⋮	2026	

BENEFITS

The Provider/Workflow data set gives you the insight you need to:

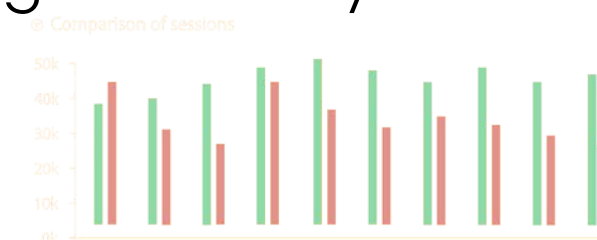


- Quantify how growth in the software aspects of product development in the smart industries is reflected in global and regional volume and growth of System Engineering and Embedded Software tools.
- Assess market share and workflow focus of leading providers.
- Plan product development or partnership approaches to this market, based on realistic revenue and competition expectations.



The separate Country/Industry data set allows you to:

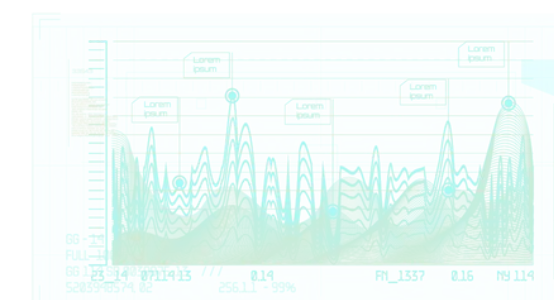
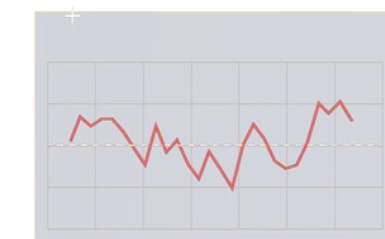
- Analyse which countries have the best market potential.
- Identify the industries with the largest market size or growth in your target countries.



RELEASE FREQUENCY

The Observatory is updated on a yearly basis.

This data set is available as a "one off" or through a subscription service.



Scope

The Cambashi SEES observatory research is split into a 2 piece observatory:

1. Focus on Providers, Geographic region and Workflow revenues on SEES software.
2. Focus on Geographic region, Country and Industry revenues on SEES software.

This Observatory is concerned with development tools used to support the production of software embedded on a device or appliance.

Forecasts and other data in this workbook are based on economic data from various sources and includes content provided by Oxford Economics.

Industry groups used in this observatory refer specifically to the smart industries, that is industries where there is an appreciable amount of software embedded on devices. These overlap with but are different from the industry groups used in the Cambashi Industry Observatory. Both sets of industry groups are derived from the same 112 detailed industry classifications, based on the ISIC standard of 2008 (Rev 4)

All revenues are reported in USD, EUR or Constant USD.

MANUFACTURING OPERATIONS MANAGEMENT (MOM) OBSERVATORY

The Cambashi MOM Observatory segments the Manufacturing Operations Management market by product group, revenue stream and geographic area.

Segment	Provider/Product	Industry	GEO
<ul style="list-style-type: none"> • Manufacturing Execution System (MES) • Human-Machine Interface / Supervisory Control and Data Acquisition (HMI/SCADA) • Process Execution System (PES) • Quality and Test Planning and Management (QMS) • Operations Analytics (OA) • Design and Simulation (DES/SIM) 	ABB AspenTech Dassault Systemes Emerson GE Digital Hitachi Honeywell Mentor Graphics Oracle Plex PSI Rockwell Automation SAP Schneider Electric Siemens PLM Werum Proxia	<ul style="list-style-type: none"> • AEC • Aerospace & Defence • Automotive • Consumer Goods • High Tech • Machinery • Process/Pharma • Public Sector • Services • Telecoms/Utilities • Transportation 	<ul style="list-style-type: none"> • AMER (Americas) • APAC (Asia Pacific) • EMEA (Europe, Middle East and Africa)

BENEFITS

- Estimate relative market share.
- Visualize current trends by technical application and geographic region.
- Run what-if scenarios to show risk exposure by industry or product type.
- Support regional planning and quarterly and year-end reporting.
- Measure performance relative to the market and competitive offerings.

RELEASE FREQUENCY

The Cambashi MOM Observatory is updated and released annually. This Observatory includes data for the current year, 4 historic years and 4 forecast years.

This data set is available as a "one-off" or through a annualized subscription service.

Scope

The data is based on primary research of available public information of the providers and products in scope and related industry data and includes revised estimates made as the result of additional research for Cambashi Market Observatories in adjacent markets, specifically in Industrial IoT and PLM.

Data for named product providers is based on a combination of detailed primary research and modelling

In addition, a combined group (ZZothers) is also included. This represents all other providers addressing this market and is estimated using a combination of sampled primary research and an interpolated/extrapolated model of the total market.

The data are provided in units of thousands (k) in 2 currencies:

- USD
- EUR

Exchange rates are taken from Oxford economics.

The data are provided in Software Provider Revenue (SPR) terms. Historic data is based on primary research of providers.

Forecasts are based on capital investment data for manufacturing industry sectors by country.

The primary source is Oxford Economics combined with historic data from national statistics sources. To maintain continuity with historic figures, the 'nominal' capital investment is used which contains an implied forecast of both inflation and exchange rates.

METHODOLOGY

Multiple approaches enable consistent, reliable datasets. We rigorously apply a series of constrain, refine and converge processes to ensure that datasets are consistent with Provider data, Country data, Industry data and Employment data.

Data sources used for the generation of Cambashi market data include but are not limited to international statistical sources, econometrics data, national statistics, 3rd party research, public financial sources, analysts, Cambashi research, and company reports.

Units and Data Metrics

- Data is provided in three currencies USD, EUR and Constant USD ("Const"). For Observatories with a country dimension, data is also available in local currency.
- Exchange rates are provided by Oxford Economics and include forecasted exchange rates for future years.
- Data is provided in Software Provider Revenue (SPR) terms. It includes software licences, maintenance, and subscription revenues. It excludes provider services, reseller margin and sales tax.

MULTIPLE INPUTS

Econometrics

Supply-side
Research

Demand-side
Research



MULTIPLE MARKET PERSPECTIVES

Industry

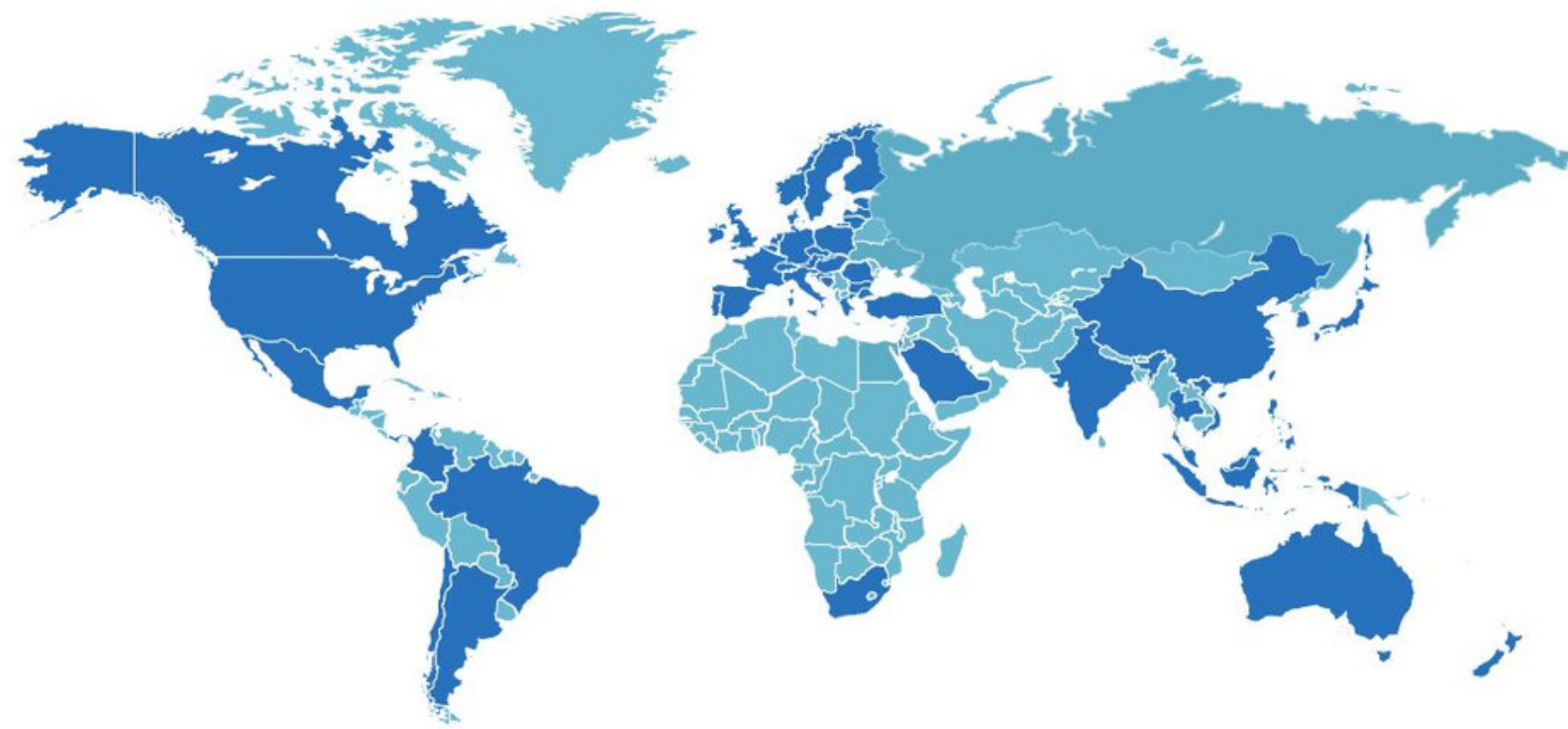
Provider



Country

Employment

GEOGRAPHIC COVERAGE



AMER – Americas region

- Brazil
- Canada
- Chile
- Colombia
- Mexico
- US
- Other countries_AMER

APAC – Asia, Pacific region

- Australia
- China
- Hong_Kong
- India
- Indonesia
- Japan
- Malaysia
- New_Zealand
- Philippines
- Singapore
- South_Korea
- Taiwan
- Thailand
- Vietnam
- Other countries_APAC

EMEA – Europe, Middle East, and Africa region

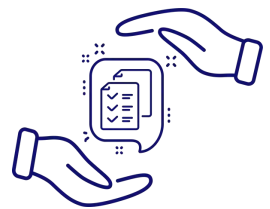
- Austria
- Belgium
- Bulgaria
- Croatia
- Czechia
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Israel
- Italy
- Latvia
- Lithuania
- Netherlands
- Norway
- Poland
- Portugal
- Qatar
- Romania
- Saudi_Arabia
- Slovakia
- Slovenia
- South_Africa
- Spain
- Sweden
- Switzerland
- Turkey
- UAE
- UK
- Other countries_EMEA

INVESTOR SUPPORT SERVICES

Cambashi has a successful track record in supporting Investor firms with target identification and commercial validation in the Engineering, Manufacturing, and Industrial software space.

Our investor services provide access to Observatories (datasets) and insight tailored to requirements on a flexible and as-needed basis.

MARKET INSIGHTS FOR DECISIONS AND ACTION



Cambashi supports the pre-investment committee (IC) preparation stage: industry trends, thematic tracking, market segmentation, and provider analysis.

RELIABLE INSIGHTS



In-depth market insight – our analysts have long standing experience of working in the banking and equity research industries and providing analytical assessments.

GLOBAL – BUT GRANULAR



Granular to country-level, tailored to a particular industry view or sub-sector performance.

SAVE YOUR TIME



We are pleased to be able to provide "off-the-shelf" datasets and dataset extractions quickly.

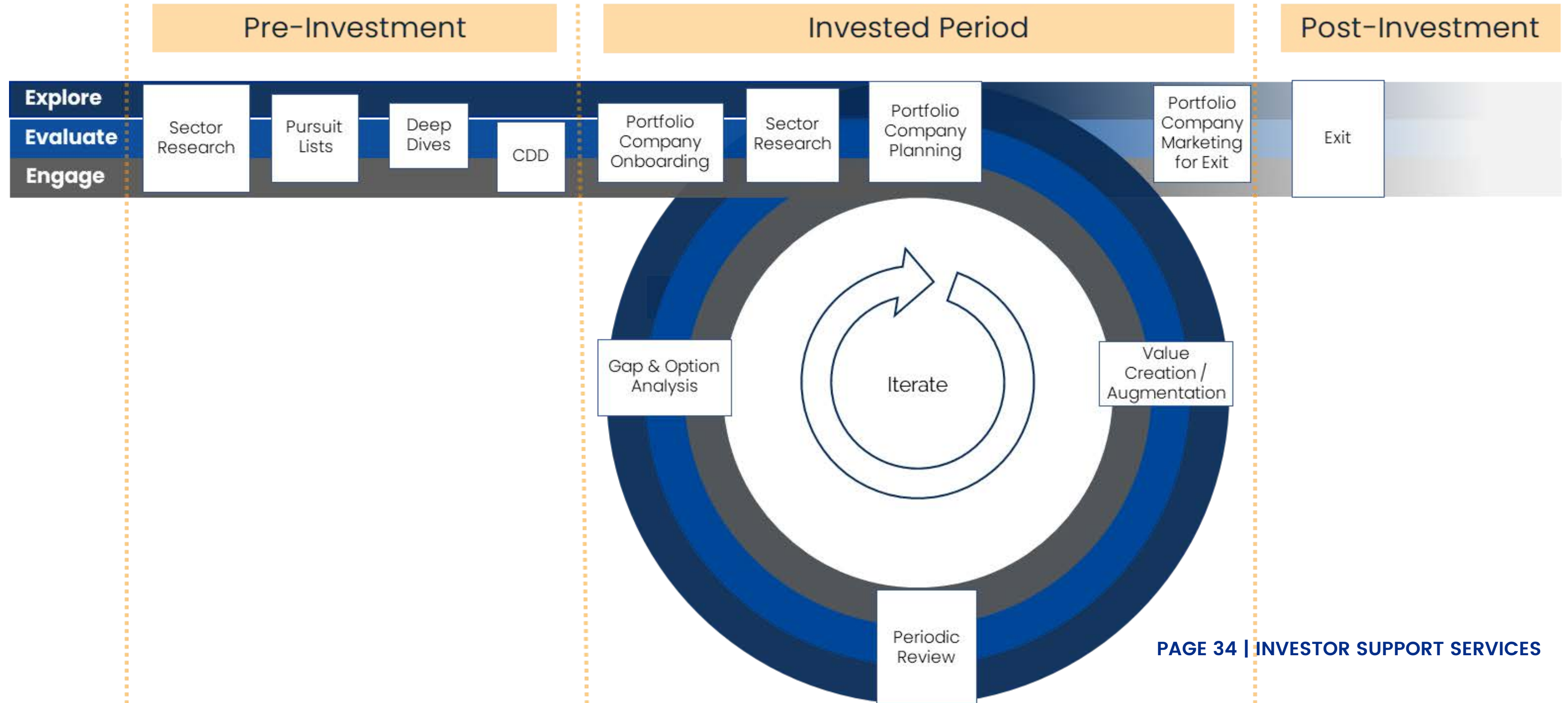
OPTIMIZE RESOURCES



We understand that investor teams do not want to spend hours trying to become a "temporary" expert. It's simply not a productive use of your time and talent.

ENABLING VALUE DURING THE INVESTOR CYCLE

- Investor teams will explore, evaluate and engage across parallel activity streams to create value
- The overall process will require foundational and iterative research and interactions
- We add value and certainty in key areas across the activity streams



CAMBASHI SUPPORT

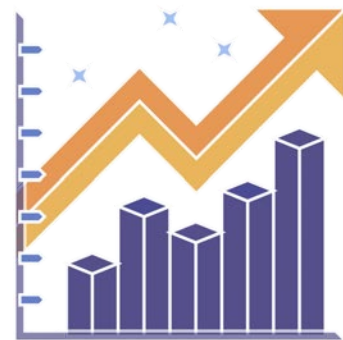


	PRE-INVESTMENT	HOLDING PERIOD	POST-INVESTMENT
RISK ANALYSIS	H	H	M
PRICING STRATEGY	M	H	M
MARKETING SUPPORT/ OUTREACH	H	M	H
COMPANY POSITIONING / MARKETING STRATEGY	L	H	H
PRODUCT PLANNING			H
TAM MODELING	H	M	M
GAP ANALYSIS	H	M	M
COMPANY VALUE CREATION		H	H
COMPANY ONBOARDING		H	
COMPANY DUE DILIGENCE	H		
ADJACENT MARKET ANALYSIS	H	M	M
PRODUCT / COMPETITION ANALYSIS	H	M	H
TAM MODELING / MARKET SIZING	H	M	H
DEEP DIVES	H	H	H
PURSUIT LISTS	H		
MARKET SECTOR RESEARCH	H	M	L

*High (H), Medium (M), Low (L)

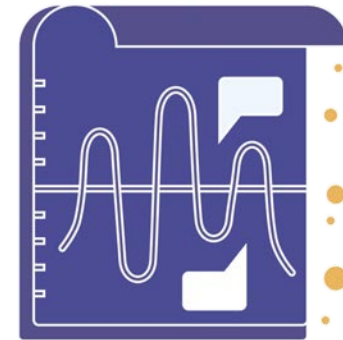
INVESTOR SERVICES DELIVERABLES

OBSERVATORIES



- Off-the-shelf data
- Custom extractions
- Trends
- Market share

ANALYST BRIEFINGS



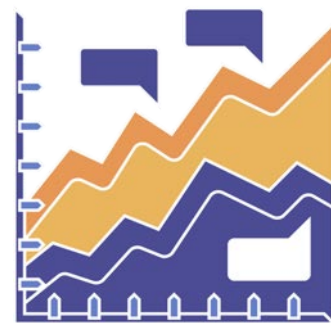
- Qualitative assessments
- Software provider insight
- Thematic overview
- Sector performance

DATA PROJECTIONS



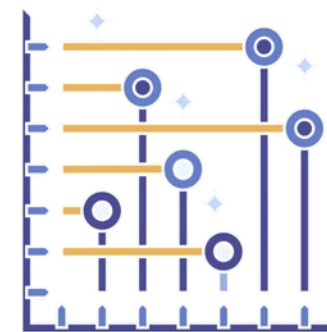
- Forecasts
- Sector performance
- Individual player performance

SUB-SECTOR RESEARCH



- Vendor selection
- Industry selection
- Country selection
- Custom segmentation

RISING STARS



- "Rising Star" analysis
- Competitive analysis
- Summary report
- Trends

MARKET DUE DILIGENCE



- Competitive landscape
- Forecast analysis
- Company assessment
- Exit opportunities

INDUSTRY SOFTWARE MARKET ANALYSIS AND OVERVIEW

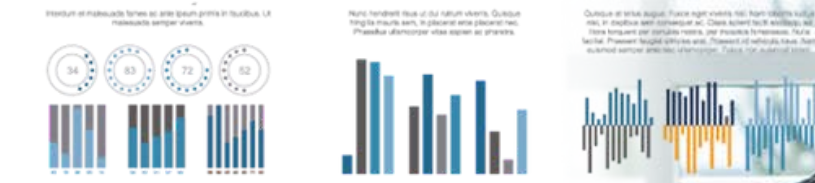
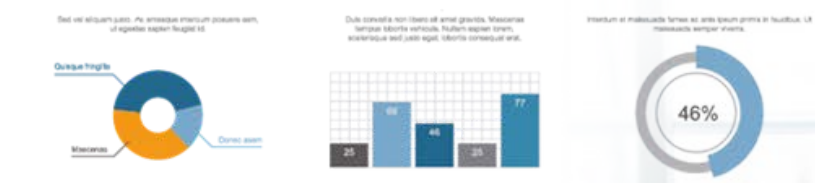
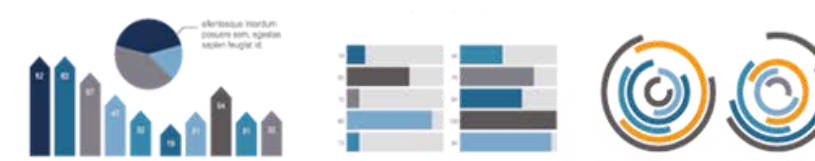
We can help you to identify the most attractive, fast-developing segments of the Engineering Software market where opportunities for lucrative growth via new market development, potential acquisition, and partnering are becoming characteristic of the segment.

- Capture the main trends and market drivers
- Identify key providers by market size, share, and potential growth
- Understand the market competitive landscape
- Forecast market growth by region, industry, and players
- Understand the impact of currency fluctuation on the technical software markets
- Strategic M&A impact and analysis
- Potential software users' analysis for establishing addressable market perspective

COMPANY ASSESSMENT AND INDIVIDUAL PLAYER PERFORMANCE

Depending on where you and your team are in the investment cycle, Cambashi can provide:

- Names, ranking, and revenues of the top providers as well as their market share, size, and growth forecast
- Providers revenues by product line, broken out by segment and sub-segment, industry sector, and country
- Mergers & Acquisition insights of key players via a market expert view on strategic growth and competitive position
- "Rising Star" players analysis broken out by segment and sub-segment, industry sector, and country
- Market Due Diligence/Transaction advisory

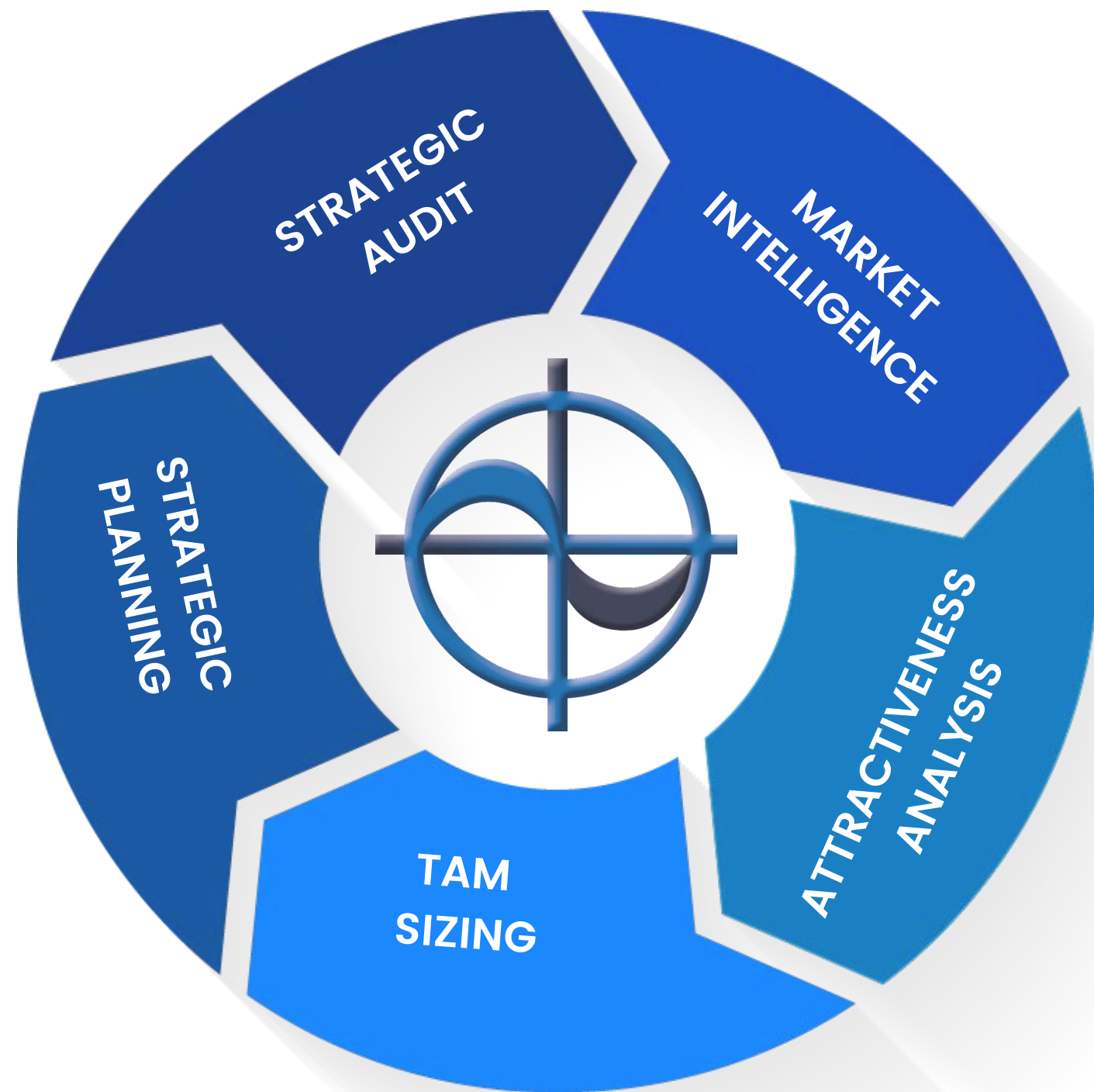


WEBINARS AND ANALYST BRIEFINGS

- Cambashi provides industry-relevant webinars and analyst briefings events (by invitation).
- Cambashi analysts speak as invited guests to an agreed theme.
- Investors specify topics of particular interest to their clients.
- Our presentation materials include selected excerpts from our market database and market research.



STRATEGY & PLANNING ADVISORY



MARKET INTELLIGENCE

- Market share, size and forecast
- Off-the-shelf data with custom extractions
- Custom data projects
- Key Players and possible disrupters

ATTRACTIVENESS ANALYSIS

- High-level view of the market
- Adjacent opportunities
- Business environment factors analysis
- Customers and competition research

TAM SIZING

- A measure of the opportunities a market offer
- Acknowledgment of various factors within the market
- Qualitative assessments of product suitability

STRATEGIC PLANNING

- Define the optimum approach and use of resources
- Likely routes to market
- Turn your plans into business success

STRATEGIC AUDIT

WHAT ARE YOU DOING WELL? WHAT SETS YOU APART?

From thought leadership, white papers and presentations to sales workshops, pursuit lists and briefing notes, Cambashi is uniquely positioned to analyze your strengths and weaknesses.

S

ARE DEMANDS SHIFTING? HOW CAN IT BE IMPROVED?

Whether it is detection of opportunity signals in the marketplace, a software product launch or business development, Cambashi's market knowledge helps define the optimum approach and use of resources.

O

W

WHERE DO YOU NEED TO IMPROVE?

Our projects are tailored to reflect each unique client position, identify competitors and analyzes their strengths whether in specific industry sectors, application areas or geographies.

WHAT ARE THE BLOCKERS YOU'RE FACING? WHAT ARE FACTORS OUTSIDE OF YOUR CONTROL?

Understanding and being responsive to rapid changes and possible disruptors in the markets you serve enables you to position your business for success.

T

INDUSTRY TRAINING

Cambashi provides industry courses in conjunction with the "Industry Insights" platform and a glossary to deepen your business and industry-specific oriented conversations.

- Become “experts” on an industry sector – and its language overnight
- Develop targeted content to address relevant industry challenges
- Quick “prep” for executive meetings
- Stay up-to-date when meeting with clients
- Build credibility in client conversations
- Rapidly search industry topics
- Sales enablement

Re-focus your sales and marketing teams away from communicating solely in terms of product features, and help them address the things that really matter to executive decision-makers in a particular industry sector.



INDUSTRY TRAINING SOLUTIONS

E-LEARNING COURSES

Self-paced e-learning courses that establish the foundational vertical knowledge needed to build overall industry competency and engage effectively with key roles from the industries.

- Self-paced e-learning for teams
- Off-the-shelf courses
- CPD/CPE-certified
- Designed for sales, audit, consultancy, and other customer-facing professionals
- No prior knowledge of manufacturing is required

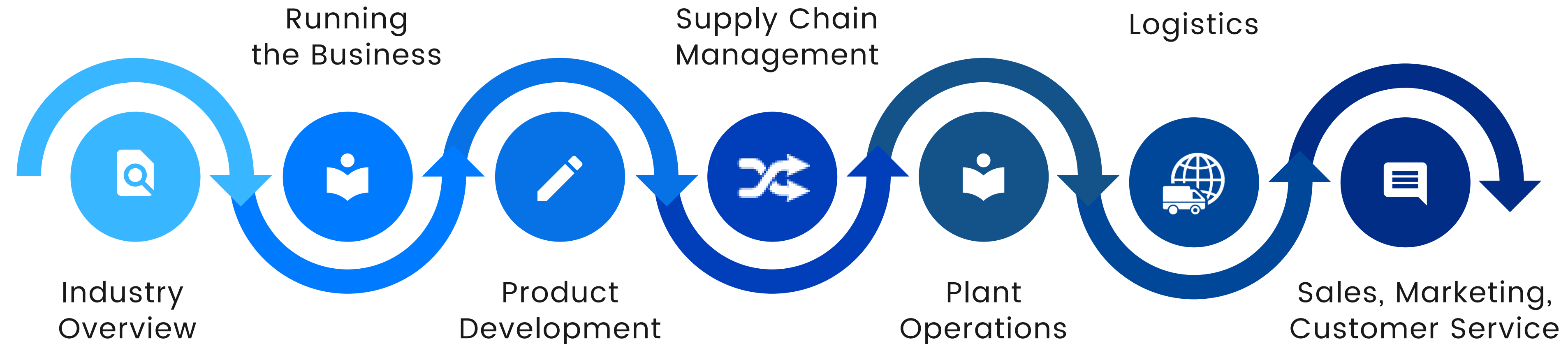
INDUSTRY INSIGHTS

A set of online industry-specific “just-in-time” support tools that provide the latest information from across the globe on the news, key trends, products, and services – within each individual industry vertical.

- Tactical industry intelligence updated in real-time by industry experts
- Cover the latest trends & challenges, business drivers, products & services, industry news
- Includes Industry terminology - Cambashi Industry Glossary
- Provides deeper knowledge across a variety of industry subjects

E-LEARNING COURSES

Cambashi provides industry training solutions, that typically cover processes common to most manufacturing industries.



Industry Fundamentals

CURRICULUM

★★★★★



The Manufacturing Fundamentals courses are designed to cover the industry's high level, universal rules and concepts. Content is updated annually where emerging technologies are having a significant impact on company operations.

Cambashi provides courses that covers manufacturing industry fundamentals

- Industry Overview
- Logistics Overview
- Plant Operations
- Product Development
- Running the Business
- Sales, Marketing, and Customer Service
- Supply Chain Management



Introduction to Manufacturing: Industry Overview
This course provides a basic overview and understanding of the manufacturing industry. No prior knowledge of manufacturing is required.

[Open](#) [Details](#)



Introduction to Manufacturing: Logistics Overview
This course introduces a manufacturer's in-house logistics operations, including both inbound and outbound logistics.

Learning Objectives:

- Identify some of the activities carried out by a

[Open](#) [Details](#)



Introduction to Manufacturing: Plant Operations
This course provides an introduction to both discrete and process plant operations, focusing on six key activity areas. No prior knowledge of manufacturing is required.


Learning Objectives:

[Open](#) [Details](#)



Introduction to Manufacturing: Product Development
This course provides an overview of the way manufacturers respond to changes in the market, and advances in technology, by developing new products to meet their customers' needs. No prior knowledge of manufacturing is required.

[Open](#) [Details](#)



Introduction to Manufacturing: Running the Business
This course introduces the way most manufacturers work at a senior executive level and the groups that support manufacturer's business activity – Finance, Human Resources, and IT.

[Open](#) [Details](#)



Introduction to Manufacturing: Sales, Marketing and Customer Service
This course introduces sales, marketing, and customer service operations within a manufacturing company, and how they differ for different types of manufacturers.

No prior knowledge of manufacturing is required.

[Open](#) [Details](#)



Introduction to Manufacturing: Supply Chain Management
This course provides an overview of manufacturing supply chain management and procurement activities and the metrics used to assess supply chain performance. No prior knowledge of manufacturing is required.

[Open](#) [Details](#)



Industry Focus

CURRICULUM



● Not started

Industry Focus courses reflect each sector's unique business landscape. The content of these courses focuses on areas such as supply chain structure, products and services, key company business processes, regulations, and sector trends and challenges - including the impact of industry digitalization.

Cambashi provides courses for a number of vertical industries:

- Aerospace
- Automotive
- Chemicals
- High-Tech
- Machinery
- Oil and Gas
- Utilities



Industry Focus: High-Tech
This course introduces the high-tech industry. No prior knowledge of manufacturing is required.

Learning Objectives:

- Answer questions about the structure of the high-tech industry.

[Open](#) [Details](#)



Industry Focus: Industrial Machinery and Components
This course is an introduction to the companies and technologies within the industrial equipment and machinery sector. No prior knowledge of manufacturing is required.

[Open](#) [Details](#)



Industry Focus: The Utilities Industry
This course introduces the electricity, gas, and water utility industries, including the structure of each of the industries. No prior knowledge of manufacturing is required.

[Open](#) [Details](#)



Industry Focus: Oil and Gas
This course is an introduction to the challenges facing the global oil and gas sector, including the structure of the industry from exploration to retailing. No prior knowledge of manufacturing is required.

[Open](#) [Details](#)



Industry Focus: Aerospace
This course introduces the aerospace industry. No prior knowledge of manufacturing is required.

Learning Objectives:

- Identify differences and similarities between the major aerospace companies.

[Open](#) [Details](#)



Industry Focus: Automotive
This course introduces the automotive industry. No prior knowledge of manufacturing is required.

Learning objectives:

- Identify the different categories of automotive products.

[Open](#) [Details](#)



Industry Focus: The Chemicals Industry
This course introduces the chemical industry and offers an overview of the sector and an insight into current trends and challenges. No prior knowledge of manufacturing is required.

[Open](#) [Details](#)



NASBA CERTIFIED

Self-paced e-learning courses that establish the foundational vertical knowledge needed to build overall industry competency and engage effectively with key roles from the industries.

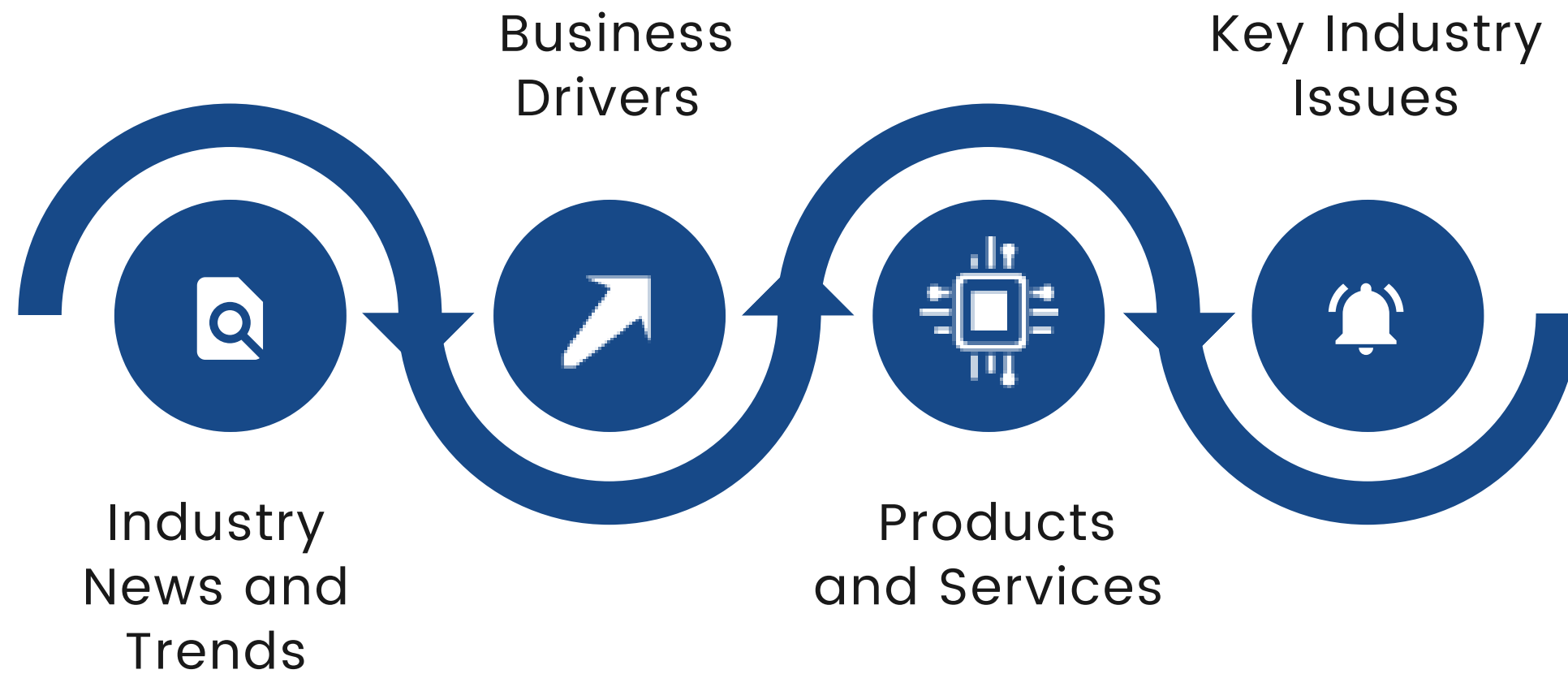


CPD CERTIFIED

Cambashi e-learning courses have been certified by the CPD Certification Service as conforming to the principles of continuing professional development, <https://cpduk.co.uk/>

INDUSTRY INSIGHTS

- Quick “prep” for executive meetings
- Stay up-to-date when meeting with clients
- Build credibility in client conversations
- Rapidly search industry topics



Welcome, visitor! [Sign in](#)

Cambashi YOUR INSIGHTS GLOSSARY ACCESS INSIGHTS

Cambashi Insights

Insights available

<p>Fundamentals</p> <p>Factory activity in the US hit its highest level in 37 years in March signaling the beginning of the recovery from the COVID-19 pandemic.</p> <p>Read more</p>	<p>Aerospace</p> <p>The Aerospace & Defense sector utilizes some of the most advanced technology in the world and spends more than \$30bn annually on R&D.</p> <p>Read more</p>	<p>Automotive</p> <p>Industry insiders anticipate there will be more innovation in the automotive industry in the next 10 years than it has seen in the last 100.</p> <p>Read more</p>	<p>Chemicals</p> <p>The Chemicals industry converts raw materials into over 70,000 different products and has an impact on over 96% of manufactured goods.</p> <p>Read more</p>
<p>High-Tech</p> <p>This industry is dominated by, with the exception of the United States, countries from the Asia Pacific region.</p> <p>Read more</p>	<p>Machinery</p> <p>Industry 4.0 is putting traditional machinery OEMs under threat as digital providers look to move into the space as new competitors.</p> <p>Read more</p>	<p>Oil and Gas</p> <p>Accounts for around 7% of global GDP and provides the dominant source of fuel for modern industry and most forms of transportation.</p> <p>Read more</p>	<p>Utilities</p> <p>Increasing global electricity consumption is putting a strain on current grid infrastructure creating competition to improve</p> <p>Read more</p>

BENEFITS

Your teams will be equipped to:

- Deepen their business and financially orientated conversations with buyers
- Position the business value of your products & solutions
- Establish credibility and differentiation from your competitors
- On-board new hires, or re-deploy experienced staff in a new industry

EFFECTIVE LEARNING



Over 10,000 professionals use our curriculum to improve their industry knowledge

INDUSTRY KNOWLEDGE



Our tactical industry training solutions created and updated in real-time by industry experts

ENGAGING LEARNING



Our interactive courses include videos, graphics, animations, and real-life presenters

KEEPING PACE WITH INDUSTRY CHANGES



Our industry training covers the latest news, trends & challenges, business drivers, products & services

DELIVERY AND ACCESS

Cambashi offers user-friendly and flexible access for our training solutions. Access can be provided either through your own organization tool or Cambashi can provide hosting support.

- Various accessibility through PC's, tablets, smartphones
- Intelligence provided by Cambashi's highly experienced analyst team

SUBSCRIPTION OPTIONS

- Subscriptions are entirely flexible from single user / multiple users
- Custom subscriptions can be tailored
- Global licenses on request

INDUSTRIES

AEROSPACE



- Identify companies operating in both the civil and defense aerospace sectors
- Grasp the key characteristics defining the industry through to manufacture and after sales support
- Differentiate and recall the relationships between members of the aerospace supply chain
- Recognize the business implications of current aerospace industry trends
- Identify the industry terminology

AUTOMOTIVE



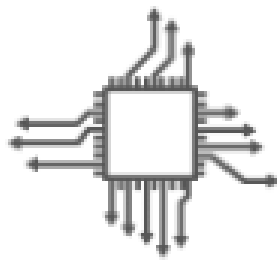
- Identify the different categories of automotive products and grasp the different strategies that influence design and production
- Identify the structure of the automotive industry and recall the activities of companies
- Distinguish between the key issues and industry trends
- Recognize some of the metrics to monitor performance

CHEMICALS



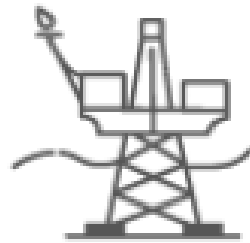
- Identify differences between the major chemicals sectors
- Apply knowledge about the structure of the industry
- Identify how companies interact
- Recognize the role of various business functions
- Recall key metrics used to measure business performance
- Answer questions regarding industry trends and initiatives

HIGH-TECH



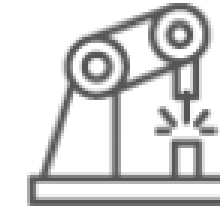
- Identify the industry terminology
- Identify the relationships between typical companies in the high-tech supply chain and understand the structure of a typical business
- Pick out some of the major issues faced by high-tech companies in today's industry
- Differentiate between the initiatives they take to respond to business issues

OIL AND GAS



- Identify a range of industry terminology
- Identify the basic structure
- Distinguish between 'upstream' and 'downstream' activities
- Identify key challenges and initiatives, as well as metrics used to measure company performance
- Identify some of the industry regulations and sustainability initiatives

MACHINERY



- Answer questions about the structure of the industry
- Identify a wide range of products and understand the manufacturing processes
- Identify key business processes and performance indicators
- Distinguish between the initiatives
- Identify areas where IT systems are improving processes

UTILITIES

- Differentiate between the terminology used in the utilities industry
- Identify the basic industry structure and the roles of the different business units in a typical company
- Identify metrics used to measure aspects of corporate performance
- Identify some of the key trends and drivers affecting the utilities industry

MANUFACTURING INDUSTRY FUNDAMENTALS

INDUSTRY OVERVIEW

- Recall examples of how manufacturing transforms raw materials into useful goods
- Distinguish between different types of manufacturing and production methods
- Recognize the characteristics of the manufacturing value chain
- Identify some of the challenges impacting the industry

RUNNING THE BUSINESS

- Identify the structure of a typical manufacturing company, how it sets business priorities and how it measures success
- Identify the responsibilities and operations of the Finance & Administration, Human Resources, and IT departments across a manufacturing organization
- Recall examples of how these departments support and enable the main business processes
- Identify terminology relating to financial reporting and other business areas

PRODUCT DEVELOPMENT

- Identify the importance of product development and the strategies behind bringing new products to market
- Recognize how documentation supports product development activities
- Identify the teams involved in these activities and their main responsibilities
- Recall details of the business challenges affecting product development and recognize how companies address these issues

LOGISTICS

- Identify some of the activities carried out by a manufacturer's logistic operations.
- Recall examples of logistics sector trends and business initiatives.
- Identify some of the metrics used to measure logistics performance.
- Differentiate between the different technologies used to enhance-logistics performance.

PLANT OPERATIONS

- Recognize six key areas of plant operations and processes involved in those areas
- Identify metrics used to assess plant performance.
- Identify the scope of plant operations
- Be aware of trends and challenges affecting plant operations

SALES, MARKETING & CUSTOMER SERVICE

- Identify the importance of marketing in manufacturing sales.
- Identify the teams involved in these activities and their main responsibilities.
- Recall details of the business challenges affecting product sales and recognize how companies address these issues.
- Recognize how documentation supports product trading activities.

SUPPLY CHAIN MANAGEMENT

- Identify a wide range of supply chain terminology
- Recall examples of how manufacturers manage their supply chains
- Identify important supply chain trends and challenges
- Answers questions regarding the roles and responsibilities of key staff

TRAINING TEAM



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POLICIES & OPTIONS

Countries and Industries can be customised from our country list and industries sectors to our clients own classifications.

Cambashi operates an open, transparent pricing strategy - there is unrestricted access for Cambashi Observatories across the client organization based on internal use.

External licenses may be purchased to allow datasets to be deployed for re-purposing – including publicity and sales enablement.

Flexibility also allows “bundling” by combining market intelligence, custom research, and training elements to offer integrated support for marketing initiatives.

Preferential fees are often available for mid-size & smaller firms.