

EDA Consortium Reports Industry Revenue Down in Fourth Quarter 2008

Source EDA Consortium, Market Statistics Service Press Release

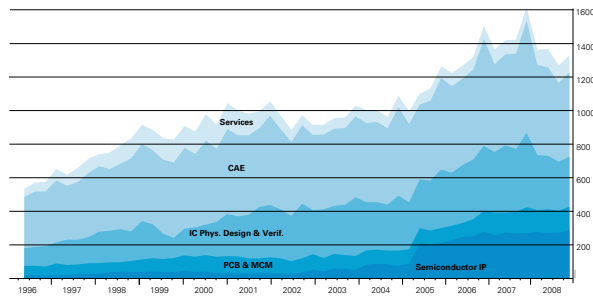


Chart 5.01: EDA and SIP Revenue, Q1 1996 to Q4 2008 [in Million US-\$]

The EDA Consortium (EDAC) Market Statistics Service (MSS) announced that the electronic design automation (EDA) industry revenue for Q4 2008 declined 17.7 % to \$1318.7 million, compared to \$1602.7 million in Q4 2007. The four-quarter moving average declined 9.4 %. Note that revenue numbers which include Q1 and Q2 2008 reflect a restatement of those numbers. "Declines in CAE, IC Physical Design & Verification, and PCB/MCM resulted in an overall decline for Q4, 2008," said Walden C. Rhines, EDA Consortium chair and Mentor Graphics CEO and chairman. "For Q4, the double-digit drop occurred in all regions except Western Europe, which showed an 8.4 % decline." Companies that were tracked employed 27,311 professionals in Q4 2008, down 0.9 % from the 27,562 employed in Q4 2007, and down 3.1 % from the 28,176 employed in Q3, 2008.

Revenue by Product Category

Computer Aided Engineering (CAE), EDA's largest category, generated revenue of \$501.8 million in Q4 2008. This represents a 24.4 % decrease over the same period in 2007. The four-quarter moving average for CAE declined 12.3 %, including the impact of the Q1 and Q2 2008 restatement. In the next largest category, IC Physical Design & Verification, revenue decreased to \$296.5 million in Q4 2008, a 32.7 % decrease compared to Q4 2007. The four-quarter moving average declined 22.5 percent for IC Physical Design & Verification. Printed Circuit Board and Multi-Chip Module (PCB & MCM) revenue decreased 11.6 % compared to Q4 2007, to \$135.9 million. The four-quarter moving

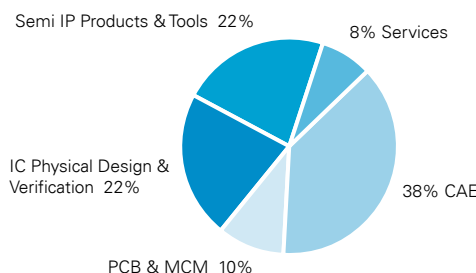


Chart 5.03: Distribution of the total EDA & SIP Revenue of Q4 2008 by Product Category

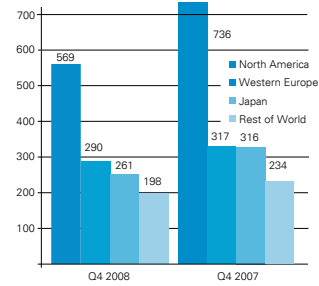


Chart 5.02: Comparison of the total EDA & SIP Revenue by Geographic Region [in Million US-\$]

average for PCB & MCM increased 0.4 %. Semiconductor Intellectual Property (SIP) revenue totaled \$285.5 million in Q4 2008, a 7.6 % increase over Q4 2007. The four-quarter moving average for SIP increased 2.3 %. Services revenue was \$98.9 million in Q4 2008, up 24.5 % from Q4 2007. The four-quarter moving average for services was up 19 %.

Revenue by Consuming Region

North America, EDA's largest region, purchased \$569.1 million of EDA products and services in Q4 2008, which represents a 22.7 % decrease compared to Q4 2007. The four quarter moving average was down 14.8 % for North America. Western Europe revenue was down 8.4 % in Q4 2008 compared to Q4 2007, with revenues of \$290.3 million. The four quarter moving average for Western Europe was down 1.2 %. Q4 2008 revenue from Japan decreased 17.3 % to \$261.3 million compared to Q4 2007. The four quarter moving average for Japan decreased 5.8 %. Rest-of-World (ROW)

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