Topic:
MCAD

Software for the Next Generation

Students are the customers of the future, and software companies have long realised the opportunity that the education sector has to offer.

To get a feel of the market and provide an overview of the trends, products and key players within the education market space, **iCAD** carried out interviews across 12 countries.

Over the next few months we will be reporting a summary of our findings within the following market sectors:

- ➤ Media and Entertainment
  - ➤ Architecture and Civil Engineering
  - ➤ Manufacturing
  - ➤ Geospatial

Part 1

Media and Entertainment

"We have to change the way we train our workforce and the way we educate our children. The trend has been set by the entertainment industry."

Carl Bass, CEO Autodesk, Inc., Autodesk World Press Day 2008, San Francisco

iCAD *is produced by Business Advantage, a B2B research, business development and marketing consulting practice operating in the global IT, Digital and Telecommunications sectors.*

Trends and Challenges

The market is growing at a very fast pace mainly due to the film industry and the growth of the video gaming sector.

Computer games development has overtaken film and TV as the driving force of innovation in design software. The gaming market is now worth $35 billion and is showing an annual growth of 43%. *Source: Autodesk World Press Day 2008.*

Leading software vendors' focus is moving towards addressing younger and younger students. It is considered important to engage students as early as possible.

"From my experience, once a student has studied with a certain product, they will stay with it. They are the customers for the future. Companies have realised that and are now heavily concentrating their marketing activities on the education market."

Maxon, Germany

Leading and well-known companies are partnering with educational institutions to encourage a stronger curriculum that better meets the needs of the industry.

There has been an increase of interest and funding from governmental bodies to support educational institutions in obtaining software; the aim is to ensure that students develop market-ready skills during their studies to improve their chances when applying for jobs and enable them to compete in world markets.

"Students in Asia are reported to have the ability to learn very quickly, and their interest in pursuing a career in Media and Entertainment is extremely high."
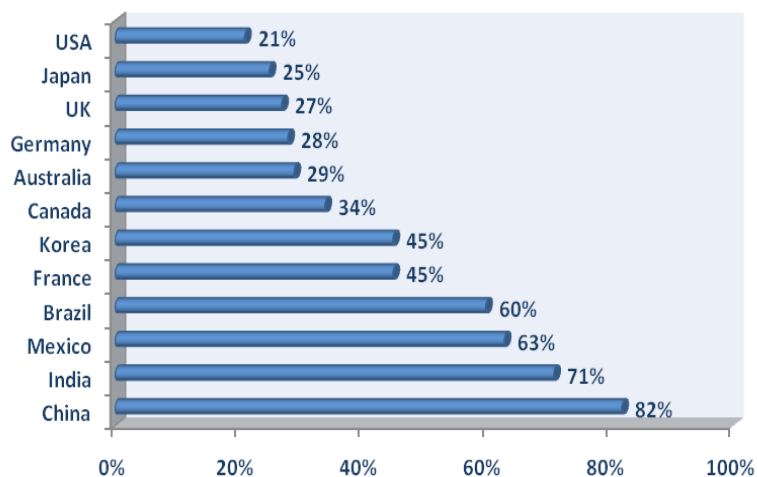
Softimage, UK

In order to prepare students for their professional careers, teachers and instructors play a key role. It is essential that they also have the opportunity to develop their skills.

"Training teachers and professionals in order to have up-to-date product and market knowledge, and thereby equipping them to pass on the relevant knowledge to their students is an absolute must. Softimage has created a "train the trainer" program aimed at training and certifying the people who are going to teach."

Softimage, UK

Piracy in this market sector is still a big issue facing software vendors. In order to decrease the amount of pirated software copies in circulation, software vendors are choosing to sell education versions of their software at prices that students can afford.

Piracy Rate

Country	Rate
USA	21%
Japan	25%
UK	27%
Germany	28%
Australia	29%
Canada	34%
Korea	45%
France	45%
Brazil	60%
Mexico	63%
India	71%
China	82%

Source: BSA Global Software Piracy Study
Figure depicts all software piracy globally

The success of films such as *Spiderman 3, Happy Feet* and *300* has further prompted awareness and interest in 3D animation amongst students and motivated many to pursue a career in design.

Media and Entertainment is the only industry sector where no student licenses are available free of charge apart from the trial versions.

Biggest players

In the Media and Entertainment market Autodesk, Avid Technology and NewTek are considered the main players. There are several other vendors such as Maxon, with their Cinema 4D product, and Pixologic but all these are not comparable in size, offers or revenue.

www.autodesk.com

In the Media and Entertainment sector, all of Autodesk's products -- including its core 3D software solutions, Autodesk Maya and Autodesk 3ds Max – are available to students, teachers and educational institutions both in higher education and at the K-12 (primary – secondary education) level.

K-12 Autodesk Animation Academy

The Autodesk Animation Academy includes Autodesk Maya, 3ds Max, MotionBuilder, and Mudbox software combined with six curriculum modules that focus on key academy subjects. The package also comes with detailed teacher guides, quickstart guides, evaluation aids, and cross references between the specific subject matter addressed and the academic subject matter. This aids in tracking Standards of Learning requirements.

These modular, customizable materials are delivered on DVD in both Microsoft Word DOC and Adobe PDF formats.

Purchase Options

"Funding can be a challenge for many schools. That's why Autodesk offers affordable and flexible purchase options for the Autodesk Animation Academy:

Annual Term License—Purchase an annual classroom license to use the Autodesk Animation Academy curriculum, including 3ds Max, Maya, MotionBuilder, and Mudbox software on up to (10) computers, with an eleventh license for the instructor. When the annual license expires, you may purchase another annual license or remove the software and curriculum from the computers without any further commitment.

Perpetual License—Purchase the perpetual right to use the eleven Animation Academy licenses. You may upgrade to future releases as part of an affordable educational discount program, designed for schools with smaller budgets and lab sizes.

Additional Licenses—Add new license in single license increments for larger labs as your program grows.

Autodesk Subscription—Purchase up to three years of Autodesk Subscription, which includes access to software enhancements, e-learning, web support and more, maintaining your perpetual licenses to keep your applications current. Available only with the purchase of a perpetual license.

Higher Education

The Autodesk Maya and 3ds Max Super Packs are offered to educational institutions to prepare the next generation of film, game and animation professionals.
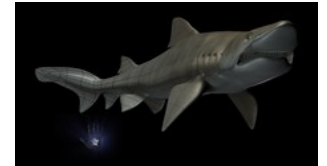
Maya Super Pack	3ds Max Super Pack
Autodesk® Maya® Unlimited software for integrated 3D modeling, animation, effects, and rendering	Autodesk® 3ds Max® software for out-of-the-box 3D modeling, design visualization, animation, and rendering
Autodesk® Toxik™ software for real-time, HDRI film procedural and 3D compositing	Autodesk® Combustion® software for desktop paint, color correction, compositing, and visual effects
Autodesk® MotionBuilder® software for real-time 3D character animation	
Autodesk® Cleaner® software for high-quality, flexible media mastering and encoding	
Autodesk® Mudbox™ for creating highly detailed organic and inorganic assets	

Autodesk has developed a program specifically for institutions that want to give their students access to Autodesk software.

In addition to the free trial versions of several of these products on the Student Engineering & Design Community site, Autodesk offers students affordable pricing on its media & entertainment software.

SOFTIMAGE

www.softimage.com

Avid Technology offers 3D animation software for games, film and television through its subsidiary company Softimage; main features include advanced modelling, animation and rendering. In various versions, including the latest SOFTIMAGE XSI, the software is available globally.

The Softimage Education Program includes the following elements:

The Softimage Education Partner (SEP) Program offers partnership opportunities for education and training facilities that are teaching SOFTIMAGE|XSI.

The Softimage Certified Instructor (SCI) Program offers 3D professionals interested in teaching with SOFTIMAGE®|XSI® the opportunity to become certified on the latest version of the software.

Purchase Options

Educational licenses of SOFTIMAGE|XSI are available from the Softimage Store, through a network of authorized resellers and directly from Softimage Sales offices worldwide.

Permanent licenses and 1 Year Subscriptions are available for purchase.

Permanent License	1 Year Subscription
Commercial Price: ~~$ 4995~~	Commercial Price: ~~$ 4995~~
Educational Price: $295	Educational Price: $175

Business Advantage
intelligence insight innovation

NewTek   www.newtek.com

NewTek offers numerous applications, tools and resources to the education community.

NewTek's main product is LightWave 3D - a robust 3D system and easy modelling and rendering tool with character animation. Further options include:

3D Arsenal: Integrated system for easy creation of 3D animation designed specifically for students who want to add industry standard graphics and animation to projects but are not required to have video editor experience.

SpeedEDIT: Video editor, providing an easy-to-use video workflow for video project resolution-independent editing, from webstreams to Hi-Definition.

TriCaster: Enables students to broadcast live events through a projector, television or the Internet.

VT[5]: Allows students to customize operation to any variety of editing software and equipment, as well as to create a variety of industry-quality productions.

Purchase Options

- ➢ Classroom Curriculum and Learning
- ➢ District – School – Classroom Communication
- ➢ Athletic Departments
- ➢ Booster and Extra-Curricular Programs

Global Market

In the 21st century the software education market is global. Vendors generally practice the same pricing policy worldwide, but nevertheless, differences are apparent.

From the 12 markets analysed, the biggest and more structured markets are USA, Canada, Japan, France, UK and Germany.

Students can buy software online from numerous websites where discounted bundles are offered along with learning DVDs and books. In fact, all vendors focus also on the learning process by offering DVD's and/or books and providing a myriad of onsite training and support.

Asia ranks highest for demand within the education software industry. The games industry development in these countries creates a huge interest, not just generally but vocationally.

We discovered a different picture in Latin America. Here the software market for education is still in its early life. Offers are not as structured, and there are still great improvements to be made. Autodesk is the only vendor of the three that has offices in the region; NewTek and Softimage rely on resellers to generate awareness and revenue.

Summary

More and more commitment to education can be seen from all software vendors currently active in the education sector. Investing in educational programs and competitions aimed at the education sector are considered by many to be beneficial marketing activities.

Due to the rapid changes in technology where global trends and challenges lead to increasing complexity, more sophisticated techniques are required from software vendors to enable solutions to be used across industries, between disciplines and within different project phases.

The educational software market is not as different from the "commercial" market as one might think; there is fierce competition. Virtually all the vendors offer the same solution to the education channel as they do to the commercial customers.

So what differs? Mostly the price. Discounts on academic licences vary slightly but vendors typically offer at least 80% discount on their commercial licenses.

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