

State of PLM: Today's Market & Leading Trends

2026 Market & Industry Forum—9 April 2026

CIMdata

State of PLM: Today's Market & Leading Trends
PLM Market & Industry Forum
 A CIMdata Leadership Event

9 April 2026—Paris, FRANCE

Peter Bilello, President & CEO, p.bilello@CIMdata.com
 +1.734.668.9922

#PLM4um

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CIMdata Defining What Comes Next in Digital Transformation

Cross-Industry Digital Impact

CIMdata: The Leading Authority on PLM
 An independent global leader providing research, education, and strategic consulting for digital transformation.

Maximizing Product Innovation
 Focused on helping clients design, acquire, deliver, and support innovative products and services.

Competitive Global Advantage
 Utilizing strategic management consulting to drive success in complex global markets.

Industry Verticals & Core Focus Areas

Industry Vertical	Core Focus Area
Transport & Tech	Aerospace, Automotive, and Computing
Infrastructure	Construction, Manufacturing, and Logistics
Service & Care	Healthcare, Retail, and Global Communication

Defining "What Comes Next"
 Guiding organizations through the evolving landscape of digital transformation and industrial innovation.

Leading strategic management consulting firm

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Key Takeaways



State of PLM: Today's Market & Leading Trends

- CIMdata continues to expand & adjust to major PLM market trends
 - Expanded support for AI, as well as introduction of Data as a Service (DaaS)
- CIMdata's global A&D PLM Action Group has entered its 12th year in partnership with market leaders—major research continues
- PLM implementations are evolving to include “non-traditional” capabilities; companies continue to heavily invest
- The global PLM Economy is growing & continues to add value
- The AI revolution is fully upon us...what will the future bring?
 - There is a clear need to separate facts from fiction

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Agenda

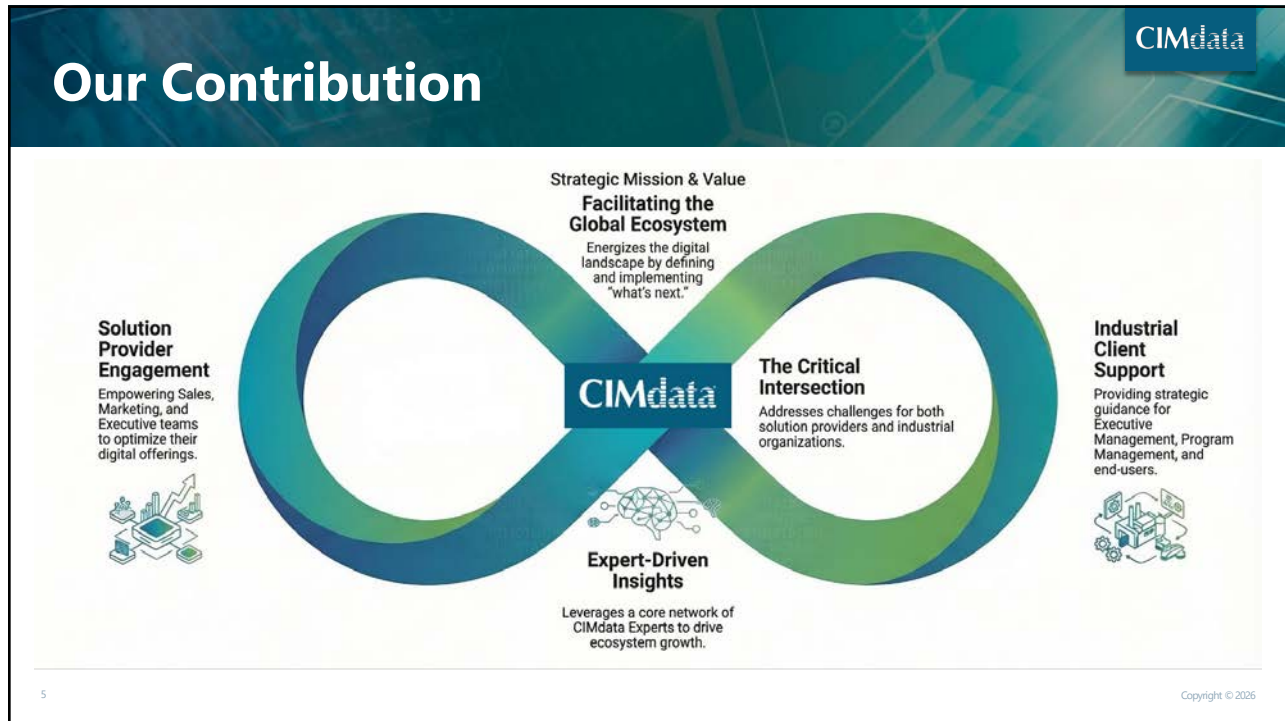
- What's New from CIMdata
- 2025: The Year in Review
- 2026: Today's Trends & Challenges
- Looking Towards the Future
- AI in PLM: Expanding Capabilities Across the Product Lifecycle
- Concluding Remarks

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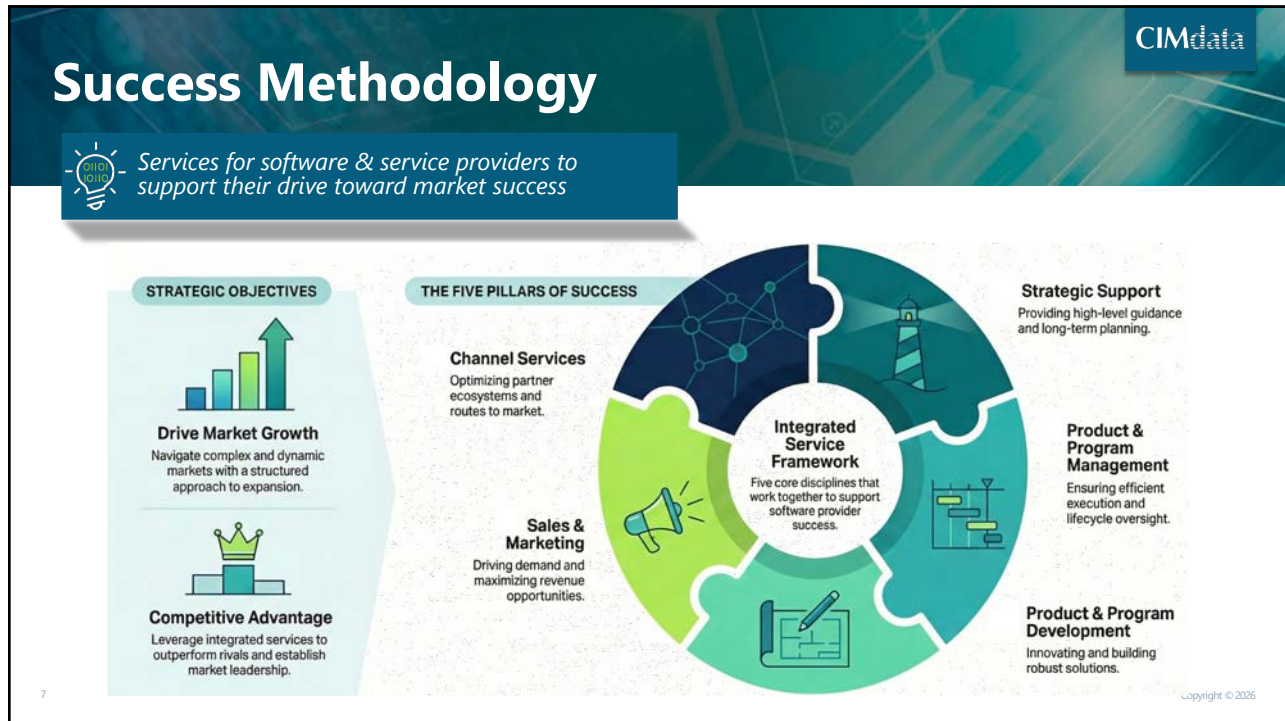
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Invest Methodology


Optimizing investments in the evolving global digital ecosystem

Six Pillars of Support

MARKET AND PRODUCT ASSESSMENTS
Evaluating market dynamics and technical product capabilities to determine investment potential

MARKET RESEARCH
Data-driven insights into the PLM landscape

MARKET EDUCATION
Informing analysts on ecosystem shifts

EXPERT NETWORK
Direct access to specialized industry knowledge


MARKET ASSESSMENT
Analyzing global market trends and size

PRODUCT ASSESSMENT
Evaluating technical value and competitive standing

COMMUNITY MEMBERSHIP
Engaging with key industry stakeholders

COMMUNITY AND NETWORK ACCESS
Leveraging community membership and expert networks for deep industry insights

RESEARCH AND EDUCATION
Utilizing market research and education to stay ahead of the digital ecosystem



CONTEXT SUMMARY
The "Invest" methodology provides an informed analysis of the global PLM ecosystem to support financial decision-making. It utilizes a multi-pillar approach to evaluate market trends and product viability for institutional investors.

STRATEGIC INVESTMENT GOALS
OPTIMIZED INVESTMENTS: Helping firms maximize returns within the evolving global digital ecosystem.
INFORMED ANALYSIS: Providing the data-backed clarity required by private equity and financial services.

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Sample Invest Clients



















































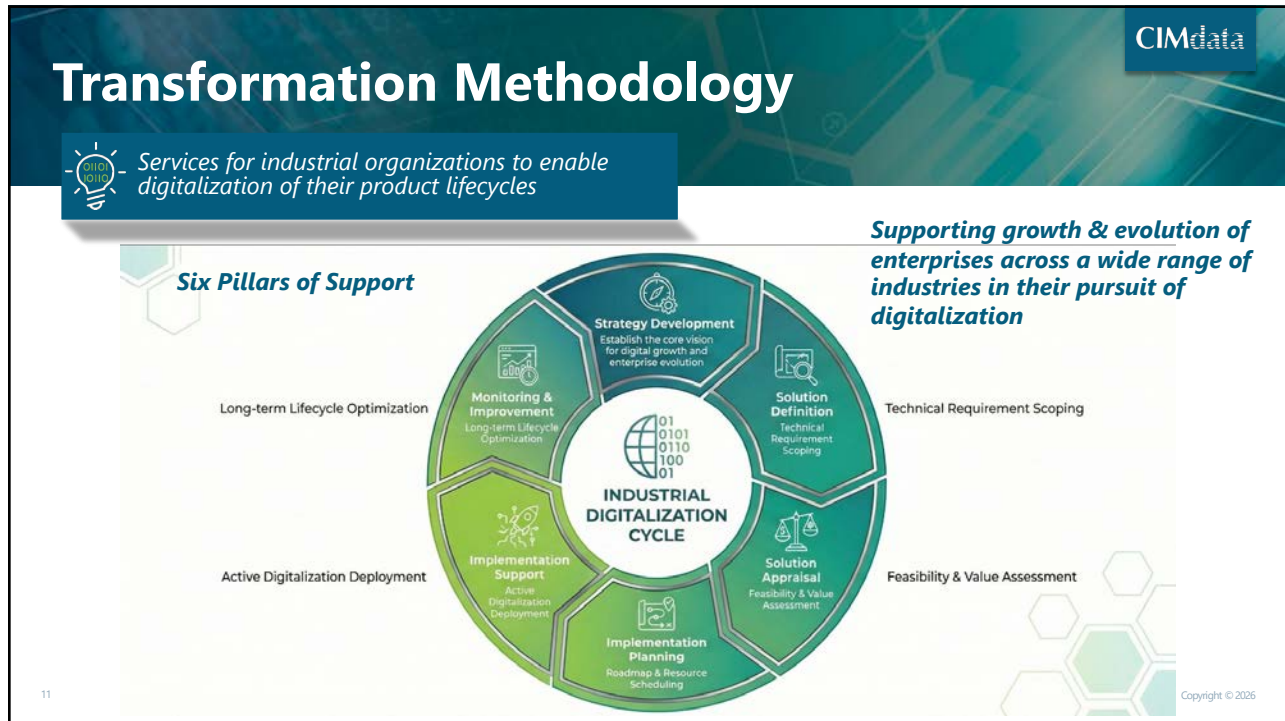




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Select Transformation Clients

Aero & Defense	Auto/Transportation	Fab & Assembly	High-Tech
ALLEN VANGUARD, Litton TASC, AIRBUS GROUP, BOEING, MOOG, Northrop Grumman, Lockheed Martin, Youghal, THALES, Orbital ATK, United Defense, RAFAEL, EMBRAER, BOMBARDIER, BERTIS, OSHKOSH, NASA, CAE, Rolls-Royce, BAE SYSTEMS, GENERAL DYNAMICS, Curtiss-Wright, ZODIAC AEROSPACE, Sandia National Laboratories, GIAT industries, Los Alamos, Bell Helicopter	Renault, Aston Martin, MAN, DURA, GM, DELPHI, FAT-N, NISSAN, JAGUAR, TOYOTA, VOLVO, PAULSTRA, Johnson Controls, BOSCH, MAHLE, TIMKEN, TVS, faurecia, HONDA, LEAR, HITACHI, INTIER, Visteon, YAZAKI, CHRYSLER, FIAT, TENNECO, GRUPO ROCAR, Ford, Autoliv, FURUKAWA, nematic, RIETER, Great Dane, AVL, NEXTEV, COOPER STANDARD	JOHN DEERE, CATERPILLAR, WARTSILA, BISSSEL, OTIS, Swagelok, McGuey, ROLEX, Steelcase, SLOAN, ILG, KONE, Husqvarna, Hypertherm, SIEMENS, Bosch, CASE, Schneider Electric, HUNTER Engineering Company, BOBST, STRATTEC, SIMPSON, ACCO, FISHER, Whirlpool, TRANE, ASH, Sidel, MELN, BANAFER, marel, Pentair, TORO, CON MET, Hunter, Stanley Black & Decker, ABB Group, COLMAX, Aprilaire, JCB, GRUNDFOS	PHILIPS, Microsoft, SHURE, AMD, GIGABYTE, OKI, rakon, Apple, 3COM, IBM, ALCATEL, tellabs, STORAGETEK, ERICSSON, BENQ, Veeco, SANG & OLUFSEN, Pulse, NOKIA, TE, Canon, LEXMARK, XEROX, Waters, MINOLTA, Sun, opnext, HUAWEI, Raytheon, hp, DOLL, FLUOROWARE, SONY, NXP










































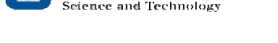
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Select Transformation Clients


CPG/F&B/Process	Medical/Pharma	Emerging Industries	Academic & Research
                  	                	                  	         

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Our Team


Deep expertise & unique industry perspective




A Team of Senior Experts
Comprised of an extensive group of highly experienced consulting professionals.




Strategic Dual Relationships
Extensive connections with both industrial clients and technology solution providers.




Manufacturing



Logistics



Healthcare



Technology

Multi-Industry Mastery
Proven experience and knowledge across a diverse range of global industry sectors.

The Hybrid Advantage
Close collaboration with industry and technology experts provides a unique strategic perspective.


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CIMdata Promotion

 James Roche promoted to Vice President, Aerospace & Defense Practice

Monday, January 12, 2026

CIMdata Announces the Promotion of James Roche to Vice President, Aerospace & Defense Practice


ANN ARBOR, Michigan, USA 12 January 2026—CIMdata, Inc., the leading global research, consulting, and education firm specializing in Product Lifecycle Management (PLM) and the Digital Transformation it enables, is pleased to announce the promotion of James Roche to Vice President, Aerospace & Defense Practice.

Mr. Roche, who previously served as Director of the Aerospace & Defense Practice, has been instrumental in expanding CIMdata's footprint within the global A&D community. In his new role, he will assume broader strategic responsibilities, overseeing the practice's growth and ensuring CIMdata continues to provide world-class insights into the complex requirements unique to the aerospace and defense sectors.

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CIMdata Team Continues to Expand

 CIMdata launches new AI practice with the additional of Diego Tamburini


Ann Arbor, Michigan, USA 2 September 2025— CIMdata, Inc., the leading global research, consulting, and education firm specializing in Product Lifecycle Management (PLM) and the Digital Transformation it enables, today announced the creation of a new Artificial Intelligence (AI) practice. Industry veteran and AI thought leader Diego Tamburini has been appointed Executive Consultant and Practice Director to lead the new practice, which will guide solution providers, investors, and industrial organizations on the practical, high-value applications of AI across the entire product lifecycle.

Drawing on Diego's deep background in PLM, CAD, CAM, CAE, and digital manufacturing, the new practice will be well placed to help companies navigate the evolving landscape of AI-driven innovation. Diego's extensive experience includes his recent role as Director of Engineering Agility at Microsoft, where he pioneered the use of AI to enhance developer productivity and streamline engineering processes. He also led product strategy for Microsoft Commercial Marketplace, with a focus on Generative AI and industry solutions. He also pre-


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CIMdata Retirement


Stan Przybylinski, CIMdata's VP, retired at the end of 2025



Stanley M. Przybylinski
 Vice President
s.przybylinski@CIMdata.com

Stan Przybylinski has over 30 years of experience in the development of business-enabling IT solutions for research, engineering, and manufacturing organizations worldwide. He has worked in R&D, marketing, and communications with both Fortune 100 companies and small organizations. Mr. Przybylinski is responsible for CIMdata's research agenda, including the CIMdata PLM Market Analysis Report series.

Stan has been directly involved with selection, consulting, integration, and implementation of large-scale PLM solutions, and has worked on projects for both PLM solution suppliers and end-user organizations in the automotive, aerospace, consumer packaged goods, high-tech, and medical devices industries. He has spoken on PLM-related topics in Europe, North America, and Asia.


Prior to joining CIMdata, Stan was Manager of Market and Competitive Intelligence for Dassault Systèmes.

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CIMdata Foresight


Market Intelligence & Strategic Analysis



Global and Regional Market Analysis
 Comprehensive reports covering market trends and competitive landscapes across various geographic regions.




PLM Benefits & Pricing Analysis
 Practical guides for appraising PLM benefits and understanding complex industry pricing structures.




Custom Research Projects
 Tailored research initiatives designed to solve specific organizational or market-facing challenges.

Industry Engagement & Insights



CIMdata Communities
 Collaborative hubs connecting industrial organizations with technology solution providers.



CAM Market Service
 Specialized tracking and analysis dedicated to the Computer-Aided Manufacturing (CAM) sector.



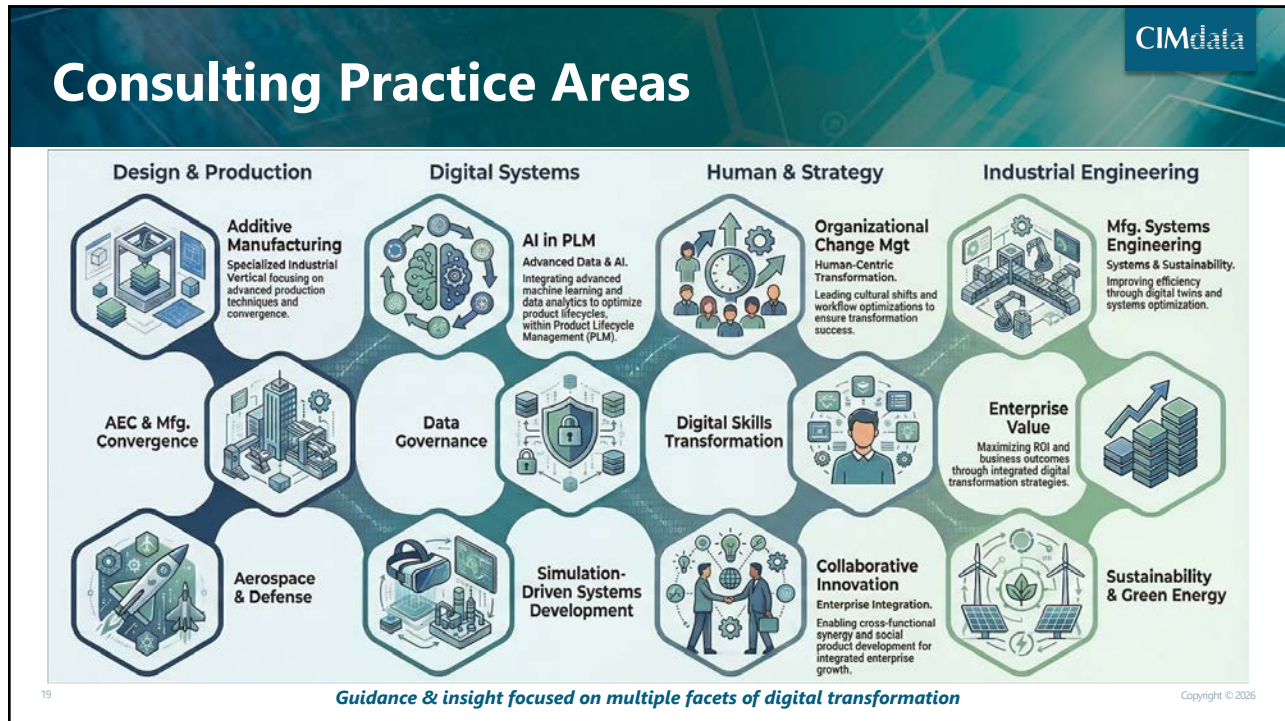
Late-Breaking Publications
 Timely commentaries and news updates on the latest developments in the digital economy.

Delivering actionable research to the global digital economy

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Aerospace & Defense PLM Action Group

Founded in February 2014

Mission
An association of aerospace & defense companies within CIMdata's globally recognized PLM Community Program, which functions as a **PLM advocacy group** to . . .

Members

Project Workstreams

- PLM Technology Obsolescence Management
- Global Collaboration
- Model-based Definition (MBD)
- Multiple View Bill of Material (Multi-view BoM)
- Interoperability Standards
- Model-Based Systems Engineering (MBSE)
- Digital Twin/Digital Thread
- Manufacturing Engineering Co-development
- PLM for In Service

Research with Solution Providers

- Digital Thread
- Model-based Systems Engineering

Website: www.ad-pag.com

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Aerospace & Defense PLM Action Group

 *Significance of collaboration with A&D PLM Action Group members*

Member companies' rankings within the global Aerospace industry

- 12 of the top 50
- 9 of the top 20
- 5 of the top 10

Leadership Meetings

- Annual Meeting
 - In person, 2 ½-3 days
- Mid-year Checkpoint
 - In person, 1 ½-2 days
- Monthly Business Meetings
 - Online, 2 hours

Titles of A&D PLM Action Group member company representatives:

- Associate Director, PLM Collaboration and Data Exchange
- Director, Corporate PLM
- Engineering CIO
- Head of Digital Manufacturing
- Head of PLM Architecture and Innovation
- Principal Analyst
- Product Development Systems - Solution Development Lead & Senior Architect
- Senior Director for Model Based Enterprise
- Senior Manager - Architecture Integration & Interoperability
- Vice President, Engineering 4.0
- Senior Global Technology Manager - Digital Engineering

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A&D PLM Action Group in the News

 *One of many press releases*

Wednesday, May 07, 2025

The Aerospace & Defense PLM Action Group Joins with prostep ivip Association to Support the Code of PLM Openness

ANN ARBOR, Michigan, USA 7 May 2025— Today, the Aerospace and Defense PLM Action Group (AD PAG), an association of leading companies in the aerospace and defense industry, announced its decision to collaborate with member companies of the prostep ivip Association (prostep ivip) to support further development and adoption of the Code of PLM Openness (CPO). The CPO aims to promote openness, making it easier to integrate IT systems into connected IT environments, extending from development and production through to after-sales, with many heterogeneous IT systems provided by numerous IT vendors. The CPO provides a framework allowing industrial users and IT solution providers to self-assess and progressively achieve higher levels of openness, leading to certification.

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CIMdata Leadership

 *Industry leading conferences, seminars, and educational programs*

- Speakers at international conferences
- PLM Market & Industry Forums for PLM solution providers
 - North America 2026 – April 7
 - EMEA 2026 – April 9
 - India 2026 – April 13
 - China 2026 – April 17
 - Japan 2026 – April 21
- PLM Road Map™ Series (2026 33rd year)—AI and PLM: A Disruptive Opportunity and a Challenge
 - PLM Road Map™ NA 2026—6-7 May, Washington D.C. area USA
 - PLM Road Map™ Europe 2026—4-5 Nov, Gothenburg, SWEDEN



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CIMdata Leadership: Educational Offering

 *Industry leading conferences, seminars, and educational programs*

- PLM Certificate Programs (Public & Private courses available)
 - Schedule: <https://www.cimdata.com/en/events/cimdata-plm-certificate-program>
- Self-paced E-Learning courses
 - <https://www.cimdata.com/en/education/plm-basics-e-learning-course>
- Digital Transformation Short Course
 - Schedule: <https://www.cimdata.com/en/education/digital-transformation-short-course>
- Systems Modeling and Simulation Certificate Program
 - <https://www.cimdata.com/en/education/sms-certificate-program>
- Monthly Complimentary Educational Webinars
 - Schedule: <http://www.cimdata.com/en/education/educational-webinars>

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Defining PLM


Digital transformation of the lifecycle, enabled by the product innovation platform

PLM is...


- A strategic business approach powered by a consistent set of solutions
- Enabled by product innovation platforms that support the extended enterprise
- An approach that spans the full lifecycle, from idea through life
- Enables a set of evolving functional domains orchestrated by an extended enterprise-level “systems of systems” approach



Multi-Disciplinary Lifecycle Optimization

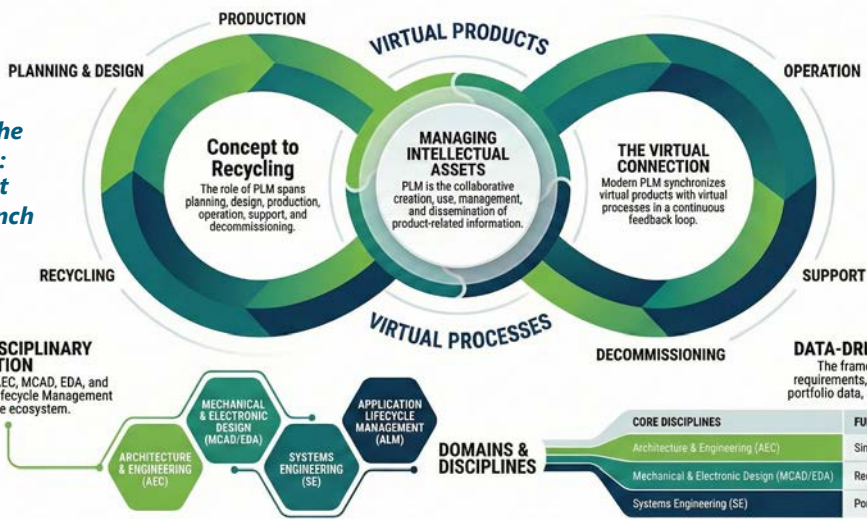
Service Management, System Ideation, System Realization, Profitability Management, Quality Compliance, Portfolio & Program Management

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PLM's Critical Role

PLM spans the full lifecycle: from concept through launch and beyond



MANAGING INTELLECTUAL ASSETS
PLM is the collaborative creation, use, management, and dissemination of product-related information.

THE VIRTUAL CONNECTION
Modern PLM synchronizes virtual products with virtual processes in a continuous feedback loop.

DATA-DRIVEN DECISIONS
The framework manages critical requirements, simulations, analytics, portfolio data, and complex formulas.

MULTI-DISCIPLINARY INTEGRATION
PLM unifies AEC, MCAD, EDA, and Application Lifecycle Management (ALM) into one ecosystem.

ARCHITECTURE & ENGINEERING (AEC), MECHANICAL & ELECTRONIC DESIGN (MCAD/EDA), SYSTEMS ENGINEERING (SE), APPLICATION LIFECYCLE MANAGEMENT (ALM)

DOMAINS & DISCIPLINES

CORE DISCIPLINES	FUNCTIONAL ASSETS
Architecture & Engineering (AEC)	Simulations & Analytics
Mechanical & Electronic Design (MCAD/EDA)	Requirements & Formulas
Systems Engineering (SE)	Portfolio Management

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CIMdata's PLM Status & Trends Survey

Some key conclusions—9th year of CIMdata's PLM Status & Trends global survey

- This year's respondents represent a very wide & diverse community
- Implementations are evolving to include "non-traditional" capabilities
- For the most part, companies continue to find PLM worth investing in
- Emphasis shifting...getting faster, better, cheaper to knowledge mgt.
- More emphasis is being placed on model-based enablement
- Unclear PLM payback still an issue for many respondents
- Vast majority believe management sees PLM as an engineering system
- Questioning the use of PLM as a term continues

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Respondent Demographics

In which geographic region is your company's headquarters located?

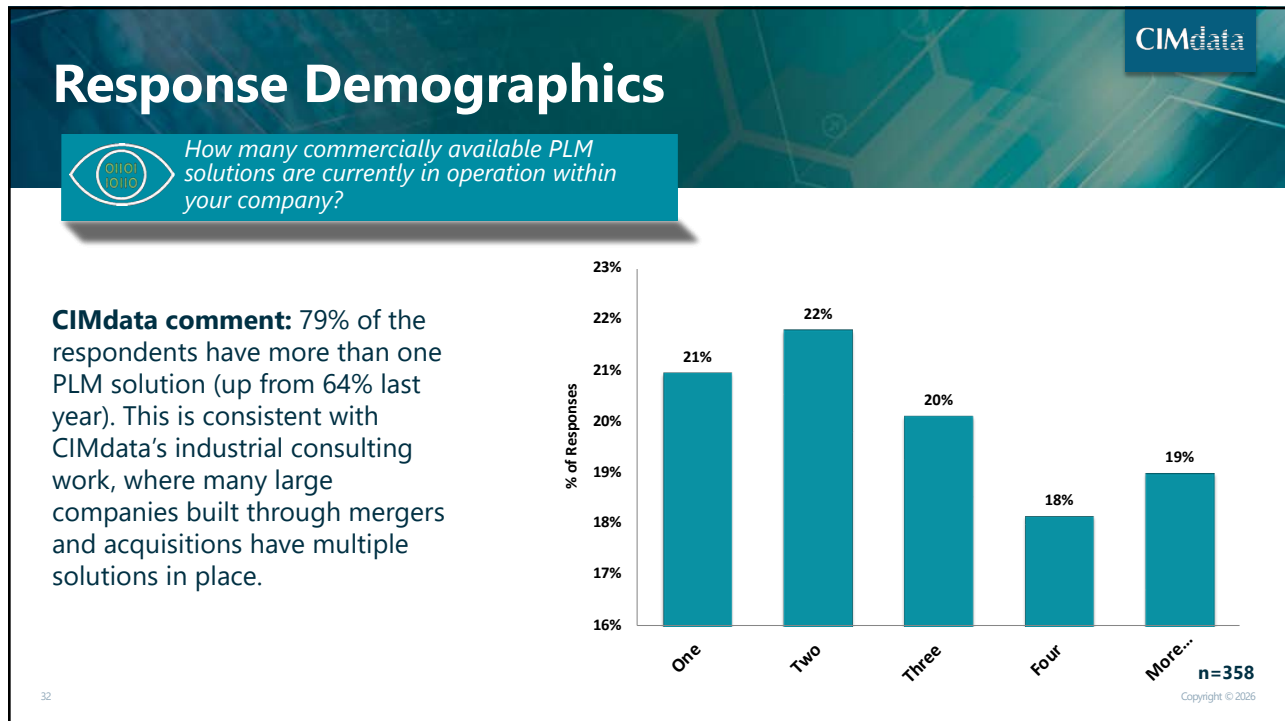
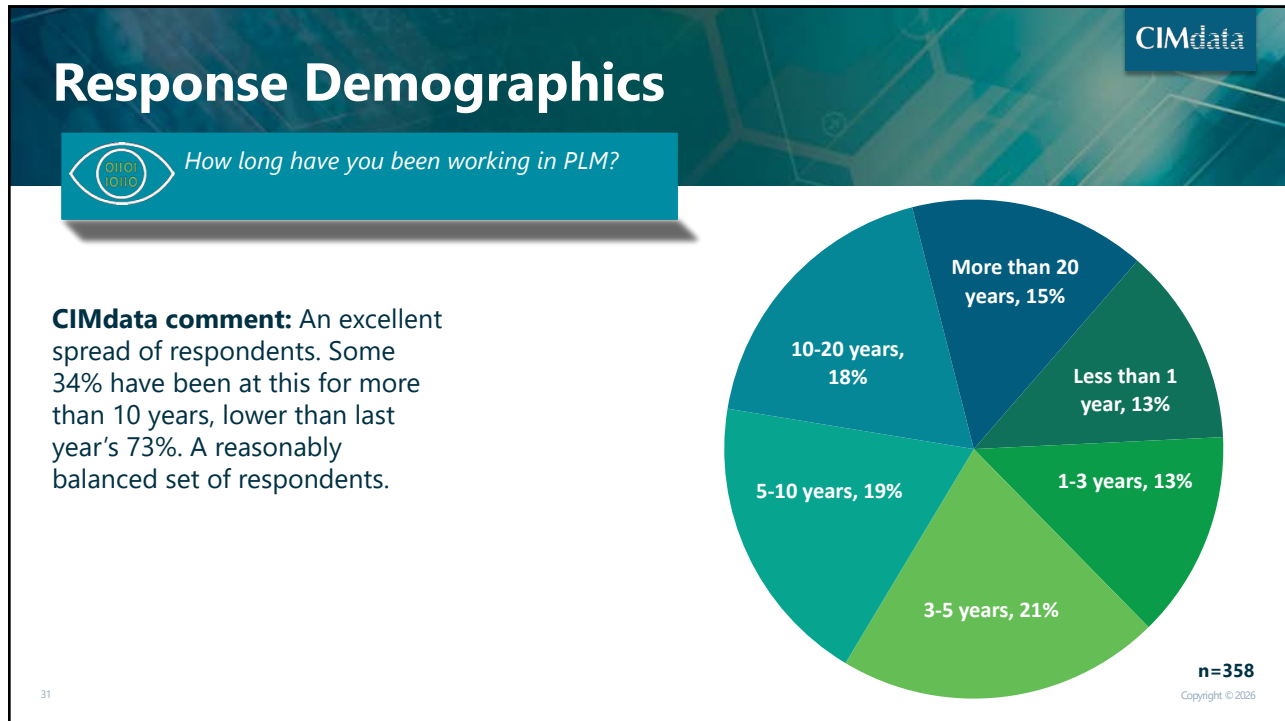
CIMdata comment:
Respondents rather evenly spread over across three regions. Global PLM spend is typically ~40-40-20 (Americas-EMEA-AP).

Geographic Region	Percentage
The Americas	37%
Asia-Pacific (including Oceania)	34%
Europe, Middle East and Africa	29%

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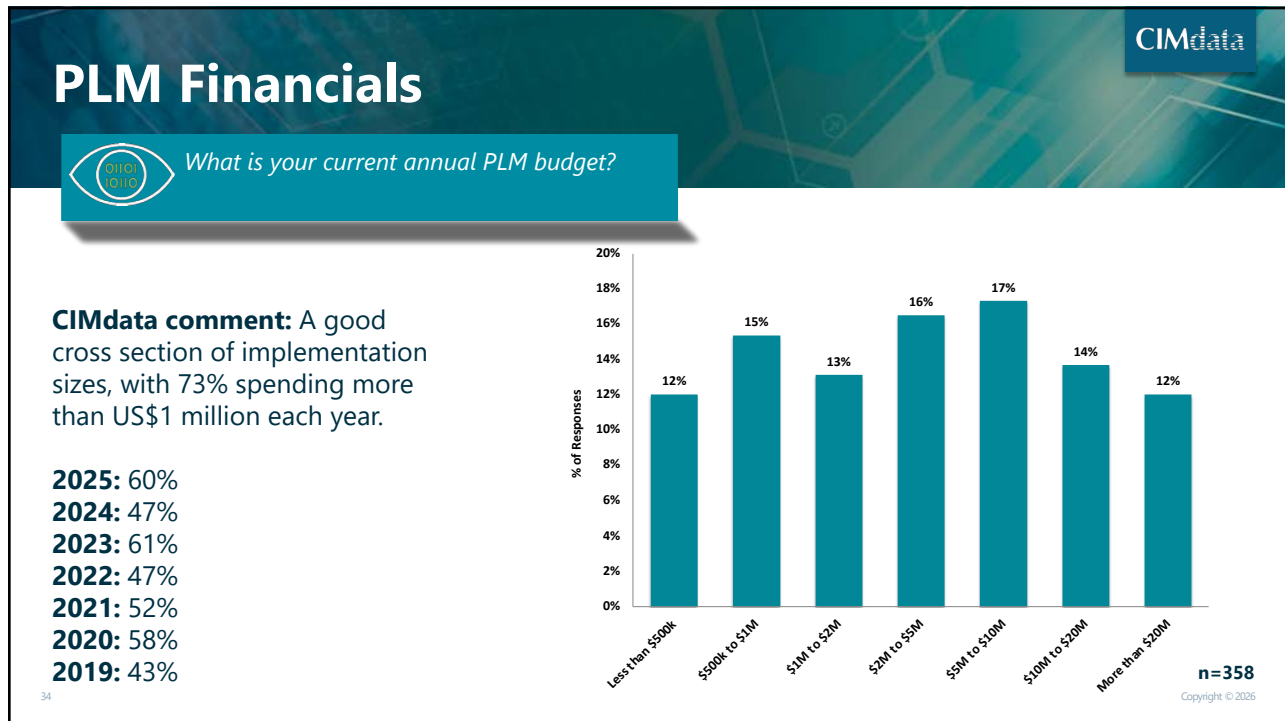
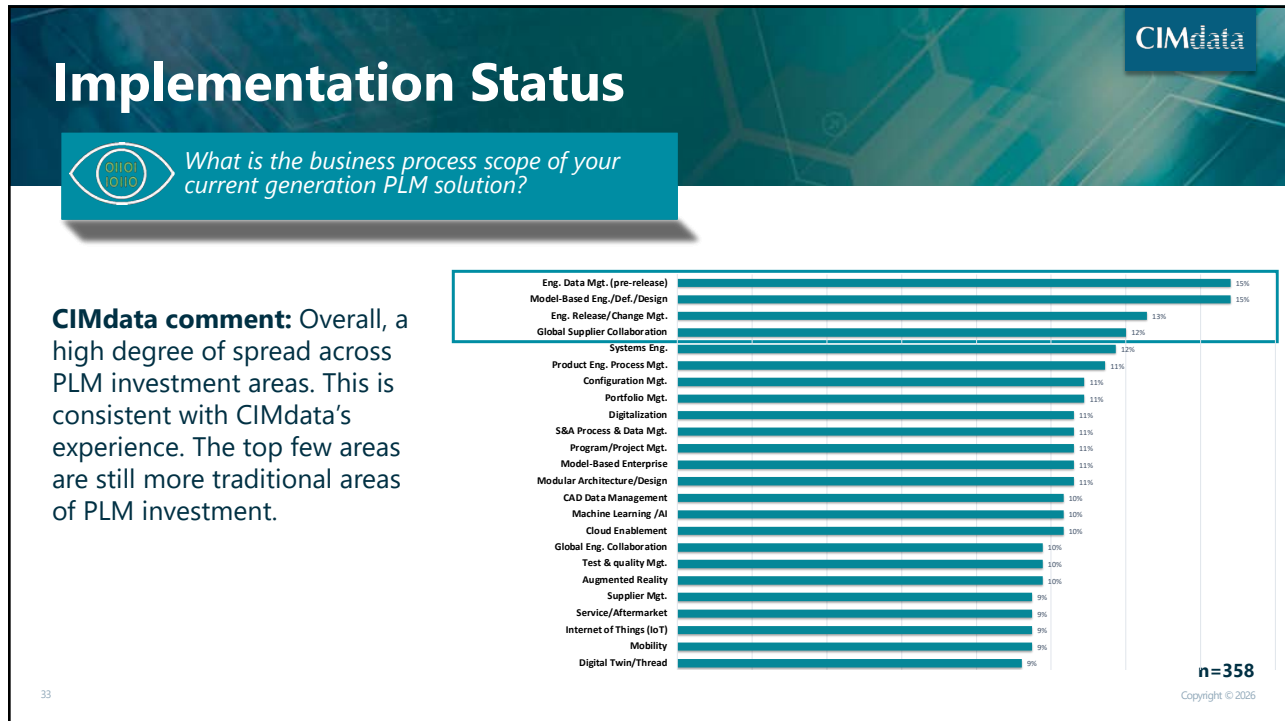
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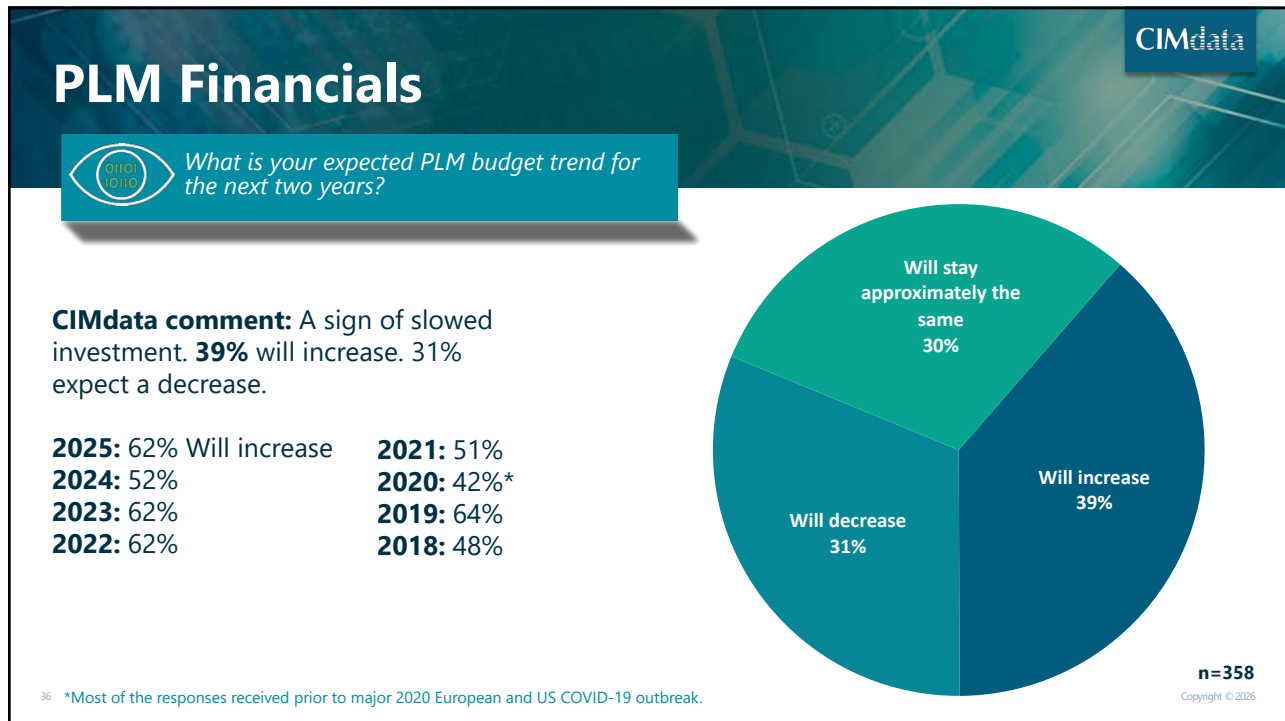
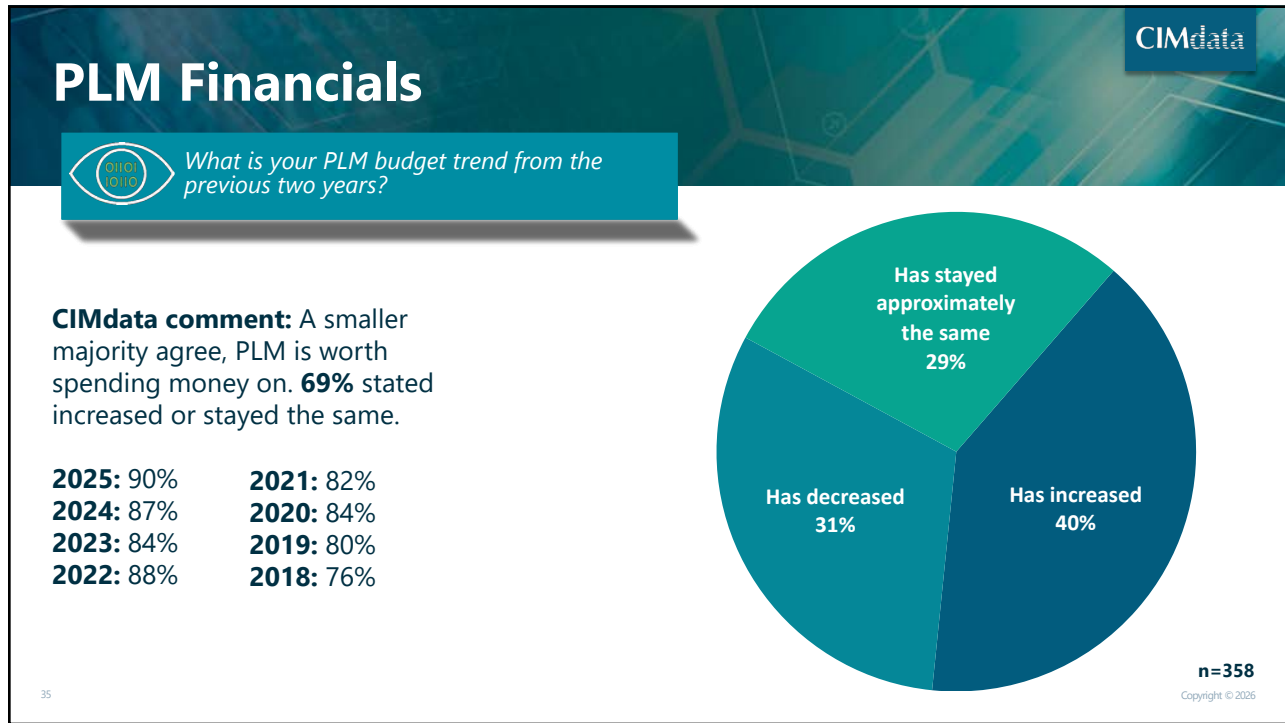
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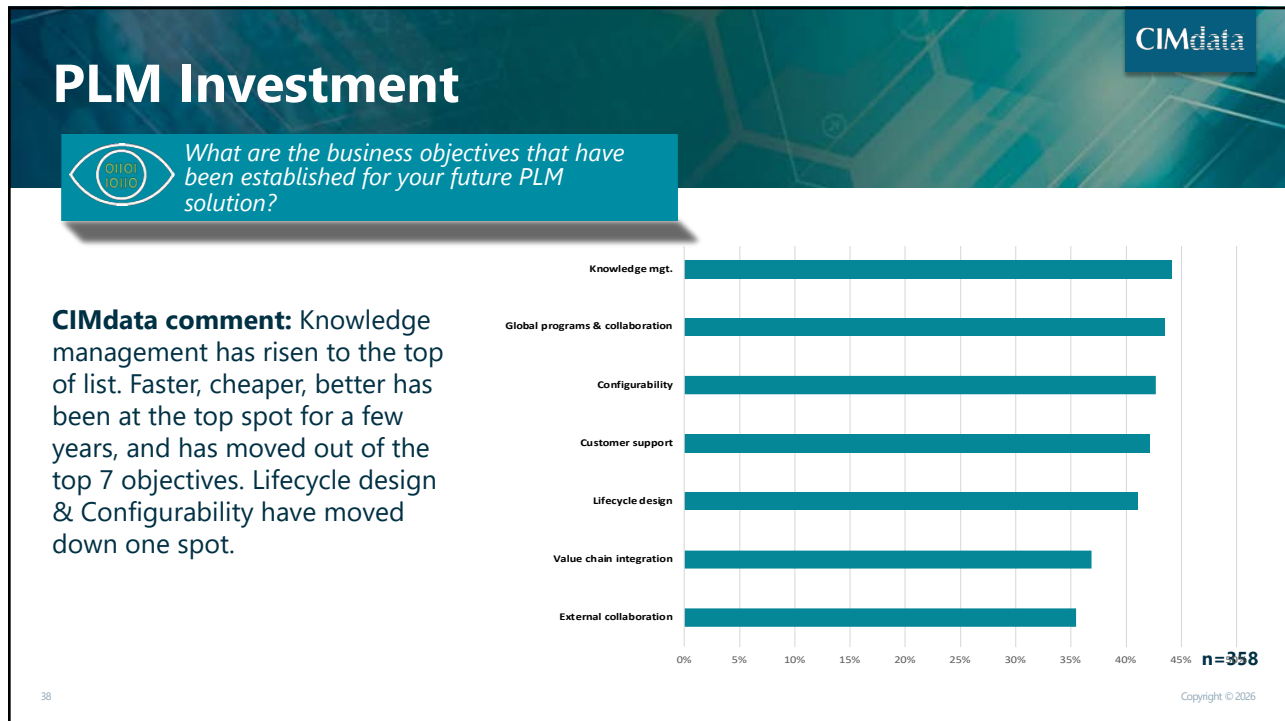
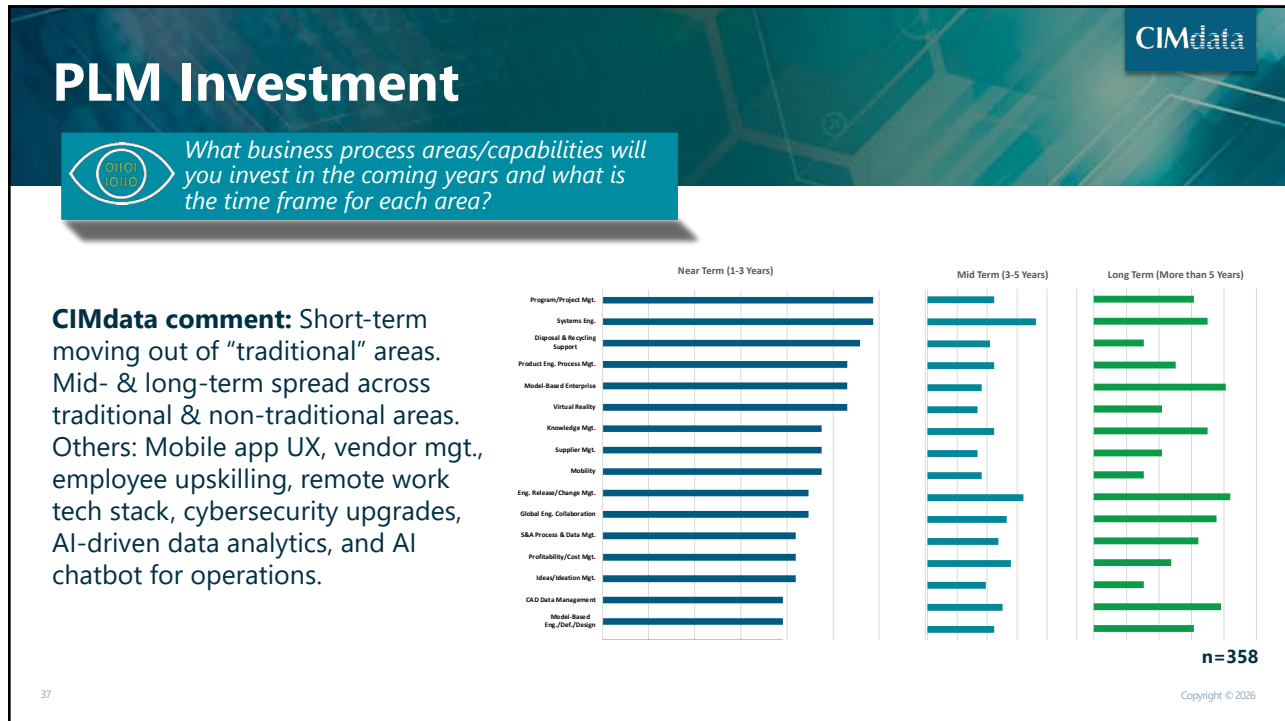
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36 *Most of the responses received prior to major 2020 European and US COVID-19 outbreak.

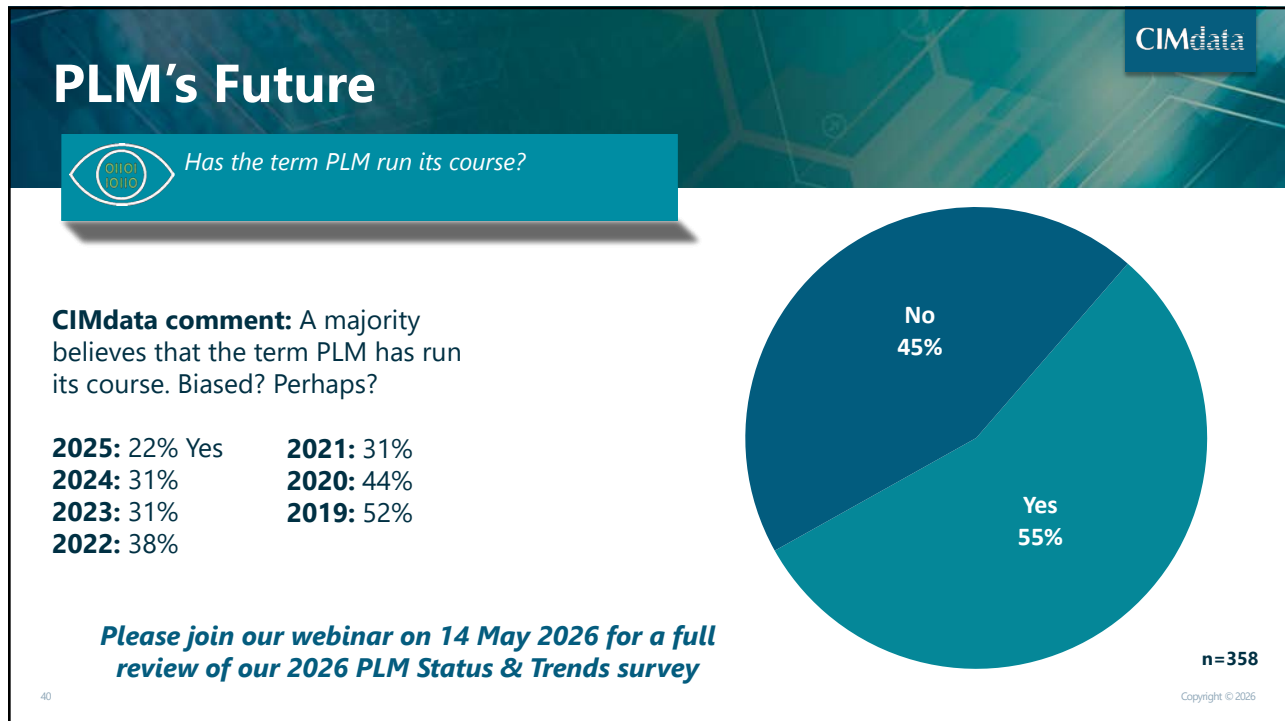
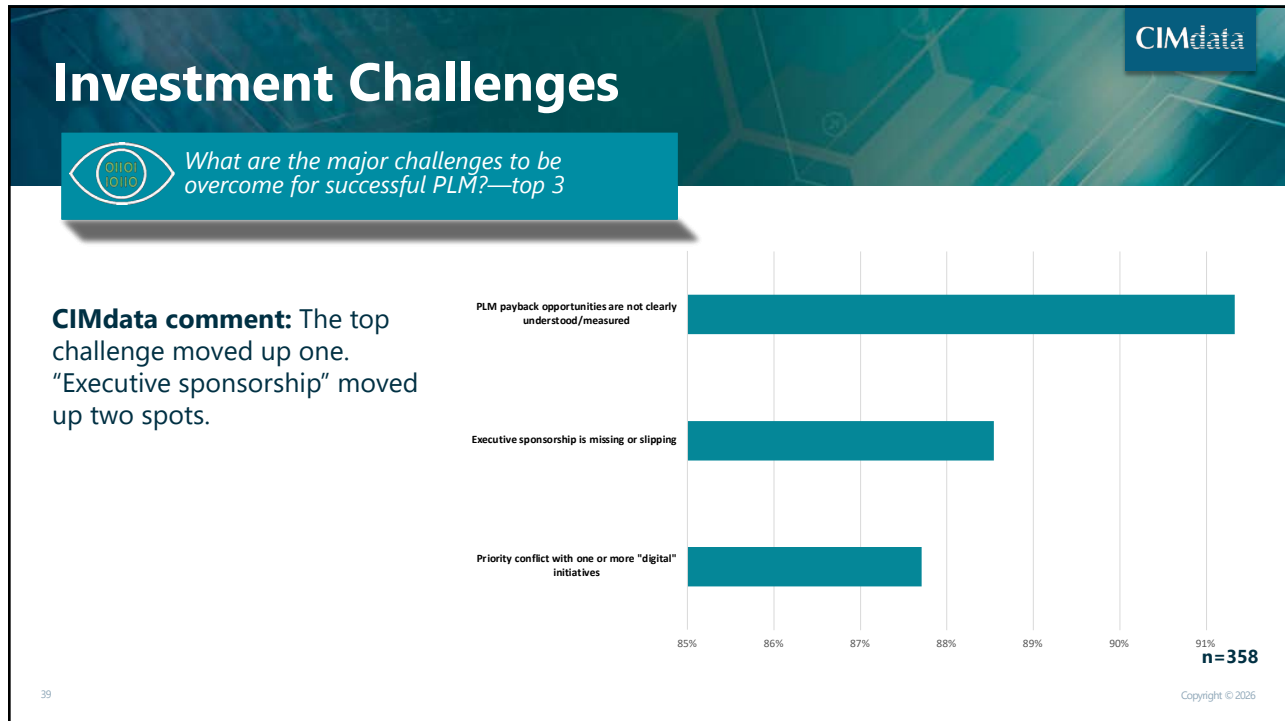
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What CIMdata Has Been Saying

 *Some examples—have you seen what we have been publishing since the last Forum*




The collage features several news items:

- Thursday, March 26, 2026**
Aerospace & Defense PLM Action Group Announces 80 Use Cases for Digital Twin-Digital Thread Investment
Ann Arbor, Michigan, USA, 26 March 2026—The CIMdata-administered Aerospace & Defense PLM Action Group (AD PAG) is sharing a catalog of 80 use cases for digital twin-digital thread (DTW-DTH). This document marks the culmination of an intensive benchmarking project designed to bridge the gap between theoretical potential and industry reality.
Recognizing the need for clarity in a complex digital landscape, an AD PAG-sponsored project team undertook the challenge of advancing the industry's understanding of current DTW-DTH capabilities. By benchmarking use cases using commercially available software and services, the team has provided a roadmap for organizations looking to scale their digital maturity. They are now releasing the use cases assembled to support the benchmark.
• Level 3: Orchestration
• Level 4: Building
- Wednesday, January 21, 2026**
Aerospace & Defense Industry Finance
This webinar will report on the findings of the report, Digital Thread Investment Findings: Current State & Future Possibilities. It is more than just a report; it is a call to action. In the current market, it is more than just a report; it is a call to action. In the current market, it is more than just a report; it is a call to action.

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Data as a Service Strategy


 *Key changes at CIMdata*

- Christine Longwell left CIMdata late last year
 - She initially undertook an initiative to modernize CIMdata's data analytics environment
 - Streamlining CIMdata's market data model
 - Implementing enterprise data analytics tool
 - While improvement was seen, the process slowed and change was necessary
- CIMdata's board in late 2025 decided to make some changes and increase the speed at which these changes would be implemented
 - Sandeepak took on lead role as our Market Analysis Director
 - Added Rajas Mote & Dipali Dindekar to our team based in India
 - New data group defined to be supported by new CIMdata data organization


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Data as a Service Strategy


 *Long-term intent & vision*

- CIMdata's Data as a Service (DaaS) will be cloud delivered, and will provide market data storage, processing & analytics services
 - New data management solution currently being implemented
 - Agreement with Tableau for internal & future external use has been signed
- Expected benefits include:
 - **Increased Agility & Speed**—CIMdata & its clients will be able to access new data sources in minutes rather than weeks
 - **Data Democratization**—Breaks down internal silos by providing a single, consistent market "source of truth" that is accessible to all authorized users
 - **Automatic Scaling**—The service automatically adjusts to future data volumes

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Data as a Service Strategy


 *Main expected features*

<ul style="list-style-type: none">• For You, Our Clients<ul style="list-style-type: none">• Real time access to released data & analytics—self service access• Access to a best-in-class enterprise analytics engine (Tableau)• Access to current & past data to better understand & track trends• Simple licensing scheme to gain access to what you need (in line with past reports structure)	<ul style="list-style-type: none">• For CIMdata<ul style="list-style-type: none">• Controlled data entry, including change traceability• Real time access to released data & analytics throughout CIMdata• Extendable platform with built in management & scalability• Access to a best-in-class enterprise analytics engine (Tableau)• Able to provide different licenses
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Data as a Service Strategy

 *Main phases*

- **Phase 1**—Define & implement data source backend (in pilot)
- **Phase 2**—CIMdata internal use & trial for all 2026 charts & graphs
- **Phase 3**—Migrate past data to new data management solution* (Q3)
- **Phase 4**—Define & execute client pilot program (Q4)
- **Phase 5**—Go Live 2027, access to defined charts, tables & graphs (Q2)
- **Phase 6**—Extend access beyond defined charts, tables & graphs (Q4)

*Expect to back populate up to 5 years of past data in key metric areas

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Data as a Service Strategy


 *Select plans beyond 2027*

- Evolve current written Market Analysis Reports
 - Access to published MAR data via Tableau, no longer in PDF documents
 - Separate publication of insights, trends, select data & projections throughout year
- Define & provide access to CIMdata publications Large Language Model & associated GenAI interface (late '26 or early '27 pilot expected)


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We Need Your Feedback



Your feedback will help CIMdata shape our DaaS strategy & implementation



- In what ways do you presently access the data supplied by CIMdata?
- Manual input, Macros/Scripts, MS Excel imported into internal software tools
- How many individuals have access to this data?
- Do you agree with CIMdata's existing PLM market segmentation? If not, what modifications would you suggest? (more on this later)
- Aside from the data itself, what additional benefits would you like CIMdata Research to offer?
- Are there any PLM adjacencies that CIMdata Research should include but currently does not?

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2025 PLM Market – Overall State



PLM market—overall growth of 8.7%

- Overall, the PLM market was up **8.7%** to **US\$87.3 billion** (vs. 9.3% forecast)
 - **Product Innovation Platforms*** sector @ US\$30.5B (8.1%); Platform Technologies grew above forecast at 8.9%
 - **Tools** sector @ US\$55.7B (9.2%); strong year for AEC & EDA, S&A missed forecast
 - **Digital Manufacturing** sector @ US\$1.1B (2.8%); growth slowed
- Continued industry consolidation, new entrants & increased investor interest
- Major PLM providers are trying to differentiate, expand reach
- Current economic uncertainty may slow PLM investments, but not its value
 - Tariffs and the threat of tariffs continue to make consumers & industries nervous
 - Global hostilities have forced some companies to reconsider their investment priorities

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CIMdata's Critical Dozen

The infographic features 12 numbered items arranged in a circular pattern around a central text block. Each item is contained within a rounded, pill-shaped bubble. The items are: 01 End-to-end connectivity, 02 Data & process management, 03 Configuration management, 04 Bills of information, 05 Model-based structures, 06 Digital thread/twin, 07 IoT & PLM, 08 Changing views of "product", 09 Big data & analytics, and 10 Augmented intelligence. A QR code is located in the top right corner of the infographic area.

01 End-to-end connectivity

02 Data & process management

03 Configuration management

04 Bills of information

05 Model-based structures

06 Digital thread/twin

07 IoT & PLM

08 Changing views of "product"

09 Big data & analytics

10 Augmented intelligence

CIMdata's Critical Dozen
The Top 12 Trends and Enablers of Digital Transformation

12 familiar, evolving trends & key enablers of digital transformation that you cannot, or should not, live without.


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Augmented Intelligence

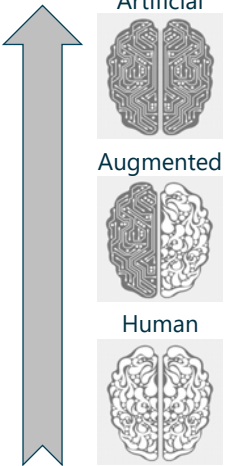
 This is where we are at—extensively covered in our 2019 PLM Market & Industry Forum

- **Augmented Intelligence** or intelligence augmentation (IA) is not about replacing human intelligence but rather about amplifying or augmenting it by enabling humans to make use of the large volume of data we're generating by combining human and machine intelligence

"Over the next decade, AI won't replace managers, but managers who use AI will replace those who don't."
Erik Brynjolfsson and Andrew McAfee, HBR (2017)

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Augmented intelligence

Artificial
Augmented
Human




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Separating Fact from Fiction

 Some of the recent press is misleading at best (1 of 2)

- The CEO of Mistral AI, Arthur Mensch, has stated that AI could replace more than 50% of enterprise software spending
 - He argues that companies are increasingly rebuilding IT systems around AI to improve efficiency and reduce costs, transitioning away from traditional SaaS tools—Feb 18, 2026
- ServiceNow positions itself as the AI operating system for the enterprise, with CEO Bill McDermott indicating that the "traditional app stack will collapse" in favor of AI-driven workflows
 - They are integrating OpenAI directly into their platform to allow AI agents to act within IT, HR, and service processes, replacing manual, clicked-through workflows—May 2025

yes & no

yes

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Separating Fact from Fiction

 Some of the recent press is misleading at best—more on this afternoon (2 of 2)

- Investors & analysts are increasingly highlighting that agentic AI—autonomous, adaptive systems—are eclipsing the dashboard-and-seat-license model of traditional software (SaaS)
- *Farewell, SaaS: AI is the future of enterprise software*, May 29, 2025
 - "...the rapid pace of AI adoption raises major hurdles. Like the shift from perpetual licenses to SaaS, the launching of new products is only part of the picture. ...Without careful planning, transition to GenAI and AI agents could just as easily disrupt revenues as it could enhance them."
 - "Enterprise software companies must ensure that integrating AI into their products creates a lasting competitive advantage rather than a short-lived gain—or even a decline in value."


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A Few Words on AI Agents & PLM

 The intersection of AI agents & PLM is a dynamic and rapidly evolving area

- AI agents within PLM environments will act as intelligent assistants, augmenting human capabilities & driving efficiency, innovation, and better decision-making throughout the product's entire journey
 - Enhanced data analysis & insights
 - Automation of routine tasks
 - Predictive analytics & optimization
 - Improved collaboration & communication
 - Design & development
 - Supply chain management
 - Quality & compliance



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AI Enablement Evolving Rapidly



Mindshare solution provider examples—PLM
Mindshare Leaders—no one is standing still

- **Aras**—AI is a seamless extension of their PLM environment
- **Autodesk**—centered on the transition from CAD to AI-Assisted Design
- **Cadence**—strategy is built on a unified big data analytics layer, JedAI
- **Dassault Systèmes**—AI is the “brain” of the Virtual Twin
- **PTC**—for AI to be useful in an industrial context
- **SAP**—strategy, AI is relevant, reliable & responsible
- **Siemens**—its strategy focuses on Industrial AI
- **Synopsys**—strategy is centered on a full-stack, AI-driven EDA suite

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What About AI On Top of the Data



A common enterprise approach for
newcomers?

- **Snowflake**—a cloud-native data platform designed for data warehousing, analytics, and AI/ML workloads
 - It operates as a SaaS running across major public clouds (AWS, Azure, GCP)
- **Databricks**—a unified, cloud-based Data Intelligence Platform designed for data engineering, analytics & AI
- **Palantir Technologies**—builds platforms for big data analysis, integration, and decision-making
 - Primarily serving government intelligence, defense agencies, and large corporations

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Possible replacements, but does it make sense to embed the knowledge?


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Just a Few Questions to Ask Yourself

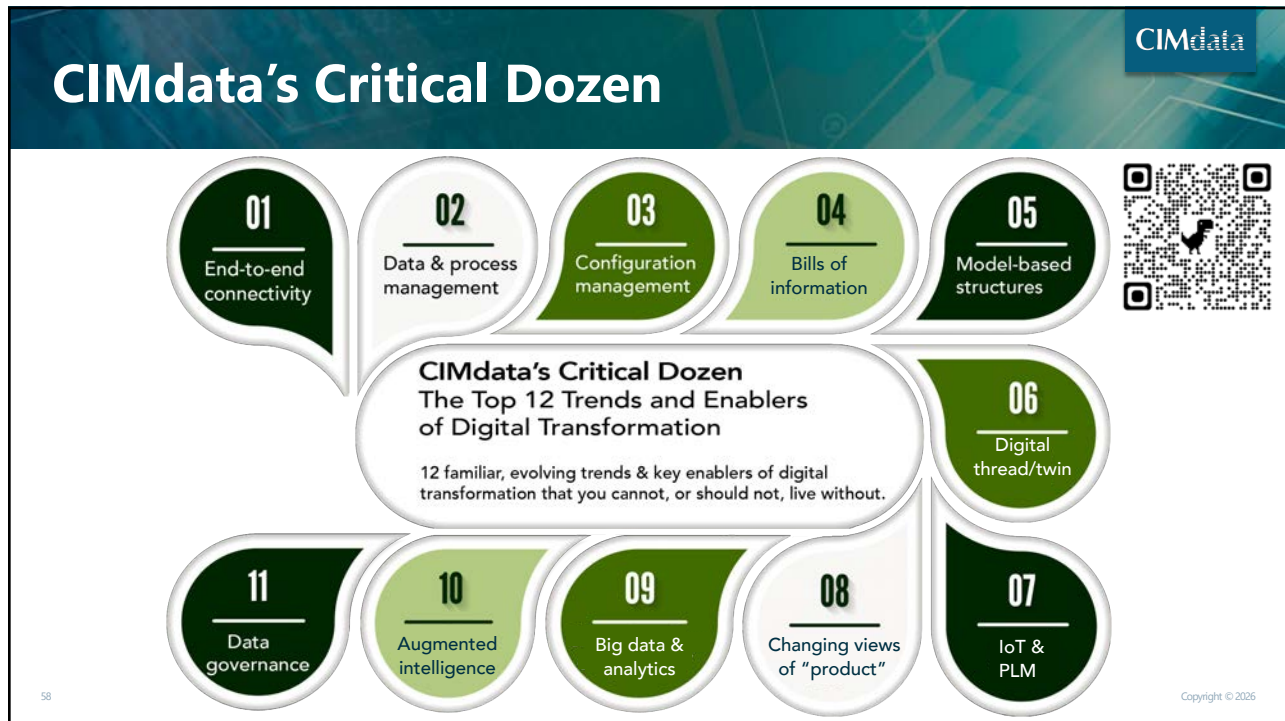
 *The devil is in the details—these and others will be addressed this afternoon*

- Can today's PLM solution providers add value through AI enablement, and if so, will they be able to monetize it?
 - If they build it, will users follow?
- Will architectures change?
- Will the knowledge worker be replaced?
 - If so, who will the PLM solution providers sell to?
- Can complex PLM-related capabilities leave out the user?
 - And if they are left out, does that mean PLM solution providers will not be able to monetize the use of their solution?

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CIMdata's Critical Dozen



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11 Data governance

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CIMdata's Critical Dozen

01

End-to-end connectivity

02

Data & process management

03

Configuration management

04

Bills of information

05

Model-based structures

12

Digital skills transformation

11

Data governance

10

Augmented intelligence

09


Big data & analytics

08

Changing views of "product"

07

IoT & PLM



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Digital thread/twin

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Digital Skills Transformation



Assessing, defining & enabling the workforce of the future—you can't transform without it

THE TRANSFORMATION FRAMEWORK



A Multi-Faceted Strategy
Programs must integrate organizational, process, technology, content, and delivery considerations.



Education & Training Framework
Establish robust implementation and support structures across all organizational processes.



Repeatable Enterprise Standards
Incorporate different skill levels into one standard applicable to any enterprise size.

STRATEGIC BUSINESS OUTCOMES



Proactive Growth Management
Proper structure positions an enterprise to handle expansion and scale effectively.



Reduced Employee Turnover
Comprehensive skill enablement increases workforce retention and engagement.



Successful Change Resilience
Empowered employees more easily navigate evolving technological and process changes.

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- What's New from CIMdata
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- Looking Towards the Future
- AI in PLM: Expanding Capabilities Across the Product Lifecycle
- Concluding Remarks

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Gartner's Top 2026 Trends

The Evolution of AI Development & Intelligence



AI-Native Development Platforms
Empowers small, nimble teams to build software using generative AI.



Multiagent Systems
Enables modular AI agents to collaborate autonomously on complex tasks.




Domain-Specific Language Models
Delivers higher accuracy and compliance for industry-specific use cases.



The Synthesist
Focuses on the orchestration and application of AI across the enterprise.

Infrastructure & Physical Impact



AI Supercomputing Platforms
Unlocks major breakthroughs in large-scale model training and data analytics.



Physical AI
Powers robots, drones, and smart equipment for tangible operational impact.



Geopatriation
Shifts workloads to sovereign or regional providers to mitigate geopolitical risks.

Security, Trust & Data Integrity



Confidential Computing
Protects sensitive data while in use across untrusted infrastructure.



Digital Provenance
Verifies the origin and integrity of software and AI-generated content.




AI Security Platforms
Centralizes visibility and control across third-party and custom AI applications.


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Key AI Considerations


We appear to be at the tipping point

- The integration of artificial intelligence (AI) into the product lifecycle is starting to reshape engineering & design practices
- AI is, for the most part, augmenting, not replacing human ingenuity in engineering & design
- Humans need to assume the role of “curator” of AI generated content
- Professionals who embrace AI & adapt to the changing landscape will be well-positioned to thrive in the years to come
- Key areas of change include Automation & Optimization, Collaboration & Efficiency, Skills, and Personalization & Customization


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AI: Shaping the Future of Engineering

AI and automation are reshaping the engineering and design landscape, focusing on operational efficiency and necessary skill shifts.


AUTOMATION & WORKFLOW OPTIMIZATION



Generative Design & Simulation
Enables engineers to explore a wider range of design possibilities and accelerated simulation.




Real-Time Predictive Maintenance
Monitor asset performance in real-time to predict failures and enable proactive maintenance.




Streamlined Collaborative Workflows
AI-powered assistants automate tasks from initial concept development through final manufacturing.

THE EVOLVING ROLE OF THE PROFESSIONAL


AI is fundamentally altering the engineering workflow by automating routine tasks and enabling advanced predictive capabilities, requiring professionals to move toward high-level problem-solving.



Shift to High-Level Thinking
Professionals will focus on curation and complex problem-solving while AI handles routine tasks.



Mandatory AI Literacy
Understanding AI principles and data interpretation is now a critical core competency.




Adaptive & Personalized Systems
Design products that learn from user behavior and adapt to environmental conditions.


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The Evolution of Autonomous AI Systems



A quick primer—much more this afternoon



LLM Processing Flow	Document-Integrated Processing	RAGs & Tool Integration	Multi-Modal LLM Workflows	Advanced Agent Architecture	Future Autonomous Agents
The foundational sequence of processing data through a Large Language Model.	Expanding LLM capabilities to ingest and analyze structured and unstructured documents.	Utilizing Retrieval-Augmented Generation and external tools to enhance accuracy and functional utility.	Enabling models to process and generate content across diverse data types like images and text.	Creating complex agents capable of independent reasoning and multi-step task execution.	Next-generation architectures designed for full autonomy and seamless environment interaction.

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Keys to Driving Digital Adoption



Most companies are missing out on digital's true benefits

- Digital adoption will continue to be problematic without a consistent & holistic enablement of technology, cybersecurity, and workforce
 - All three must be addressed to be successful



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Digital Adoption Challenges

TECHNICAL & OPERATIONAL HURDLES

- Siloed Data & Integration Gaps**
Advanced manufacturing needs integrated data, but information remains trapped in separate, uncoordinated systems.
- The Legacy Infrastructure Burden**
Outdated manufacturing assets lack the modern connectivity and cybersecurity required for AI readiness.
- Lack of Unified Standards**
Inconsistent datasets and a lack of standards cause system incompatibility and design inefficiencies.

STRATEGIC & WORKFORCE BARRIERS

- Supply Chain Blind Spots**
Limited visibility beyond second-tier suppliers exposes the ecosystem to unknown risks and vulnerabilities.
- A Critical Skilled Labor Shortage**
An aging workforce and lack of training hinder the expansion of domestic manufacturing.
- Uncertain ROI for Digital Adoption**
High costs and a lack of standardized frameworks make it difficult to prove business cases.

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Some Opening Remarks



AI opportunities across product lifecycle
(1 of 2)

- AI operates on data—there is no question about it
- For AI to be usable, it needs to operate on large & valid data sets (aka, large language models), or it will hallucinate—thereby providing negative value
- The massive amount of data being generated throughout the lifecycle must be under configuration control or its' potential value is greatly minimized, and AI will be of little or no use
- What about using AI as a lifecycle assistant or as a mechanism to syndicate an organization's digital twins—can this work if the data isn't complete or valid?

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Some Opening Remarks



AI opportunities across product lifecycle
(2 of 2)

- What about Generative AI—powered by large language models?
 - GenAI, for example, can be a way of pulling data from documents without the pain of finding & opening the documents
- Deep-learning models can generate high-quality text, images, and other content based on the data they were trained on
 - Again, it is all about the data
- AI has gone through many cycles of hype, but even to skeptics, the release of ChatGPT & similar tools seems to mark a turning point
 - We need to understand & be prepared to support the incorporation & valued use of AI in our lifecycle processes

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We Can't Forget About AI Governance



AI governance is essential for ensuring that AI is developed & used responsibly

- AI governance encompasses a set of principles, rules & practices that guide the development, deployment & use of AI enabled systems
- Here are some of the key reasons why it is important:
 - **Safety**—helps to ensure that AI systems are safe and do not pose a risk to people or the environment
 - **Ethics**—can help to ensure that AI systems are used ethically & fairly
 - **Transparency**—can help to ensure that AI systems are transparent
 - **Accountability**—can help to ensure that there is someone accountable for the development & use of AI systems
 - **Trust**—can help to build trust in AI systems

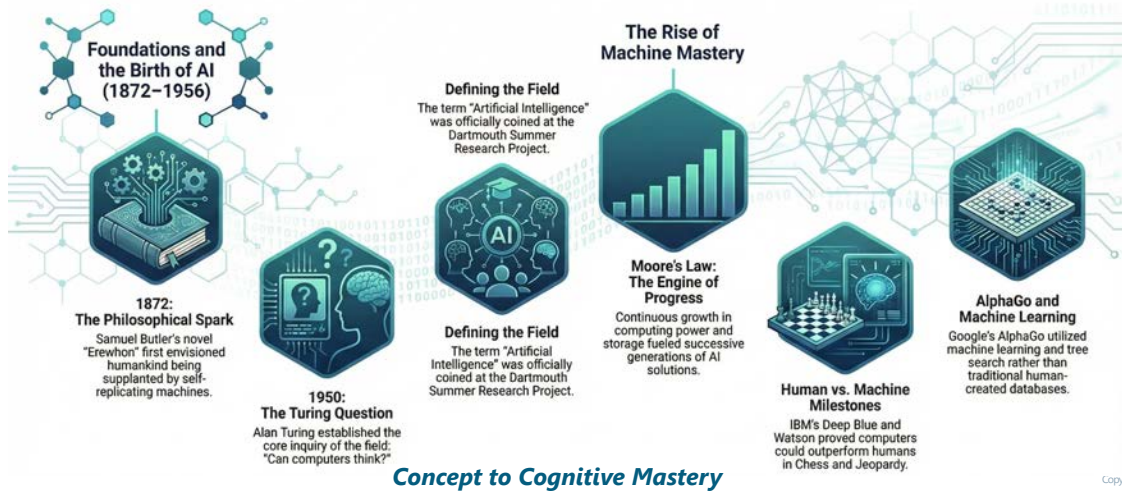
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Today's Theme: The Evolution of AI

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This infographic tracks the journey of Artificial Intelligence, starting with 19th-century literature and progressing through the foundational work of Alan Turing and John McCarthy. It highlights how Moore's Law fueled the transition from rule-based systems to modern machine learning models like AlphaGo.

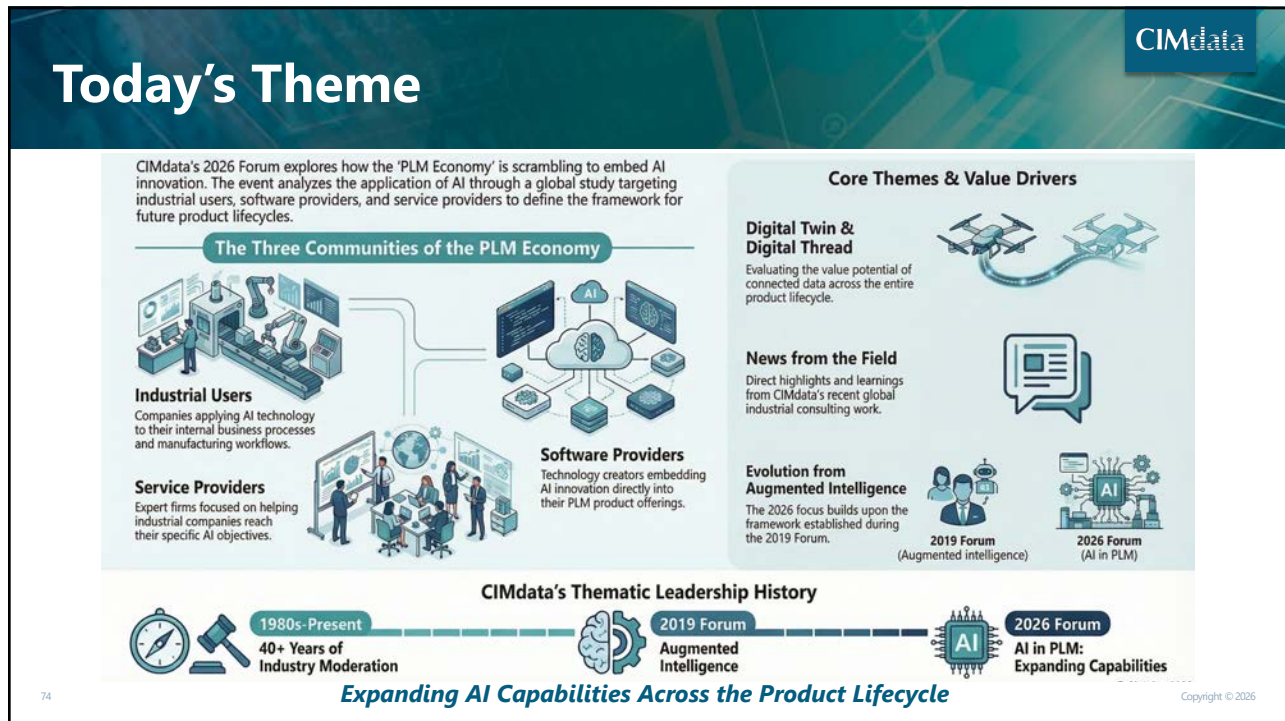
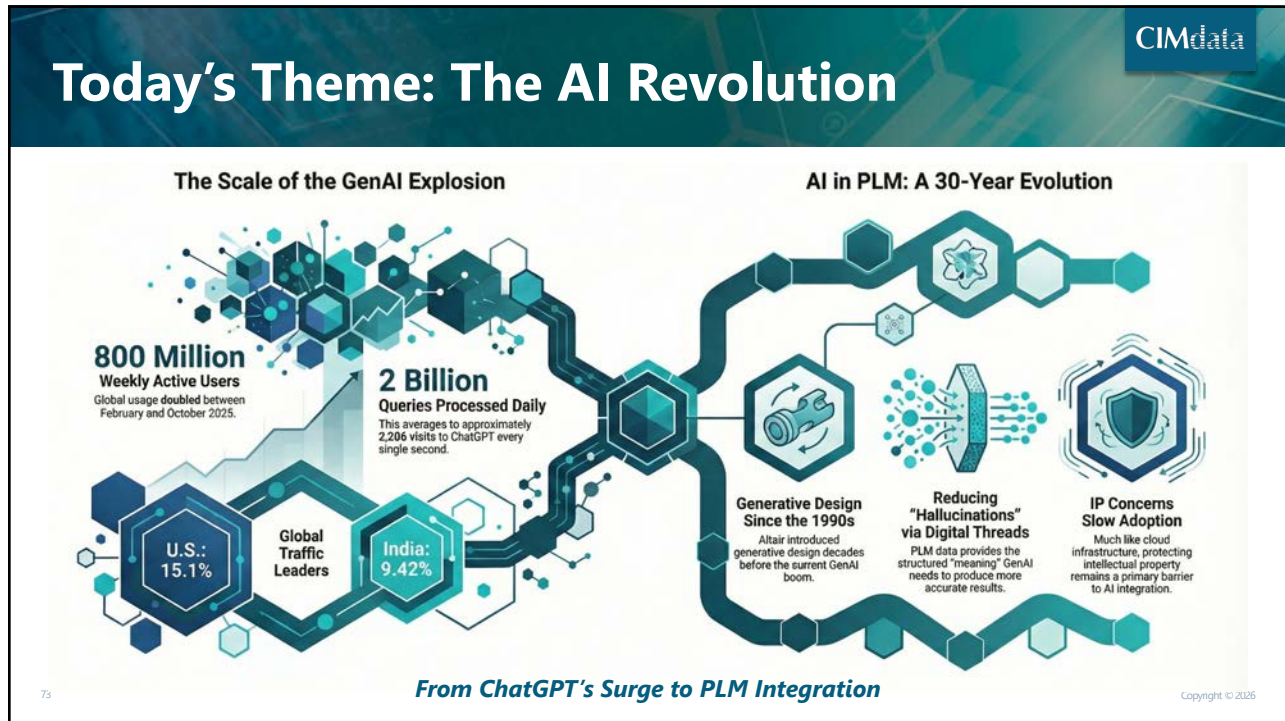


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Today's Agenda

 2026 PLM Market & Industry Forum (1 of 2)

- **Special Guest: LM of the Future: What place for humans in the digital transformation of companies?**
 - *Frédéric Segonds, Professeur des Universités, Arts et Métiers Paris*
- **The State of AI in PLM: Results from CIMdata's Industry Research**
 - **AI Overview**
Diego Tamburini, Ph.D., Executive Consultant & Director, AI in PLM Practice
 - **AI in Industry**
Peter Bilello, President & CEO
 - **AI in the PLM Economy**
Diego Tamburini, Ph.D., Executive Consultant & Director, AI in PLM Practice
- **Break**

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Today's Agenda


 2026 PLM Market & Industry Forum (2 of 2)

- **Updates on Key Topics**
 - **The Value Potential of Digital Twins and Digital Threads**
Peter Bilello, President & CEO
 - **News from the Field**
Peter Bilello, President & CEO
- **Closing Comments**

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Concluding Remarks



State of PLM: Today's Market & Leading Trends (1 of 2)

- CIMdata continues to expand & adjust to major PLM market trends—adding people & services to stay at the forefront
- CIMdata's global A&D PLM Action Group has entered its 12th year in partnership with market leaders—major research is underway & you can participate
- PLM implementations are evolving to include “non-traditional” capabilities; companies continue to heavily invest
- The global PLM economy is growing and continues to add value to those who pursue its implementation

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Concluding Remarks



State of PLM: Today's Market & Leading Trends (2 of 2)

- The global PLM economy continues to increase as it approaches another milestone—**US\$87.3 billion—an 8.7% increase**
- To be successful, companies need to transform people, processes and technologies—there are at least 12 evolving critical elements—the convergence of digital thread/digital twin & the continued and widespread adoption of MBSE & AI is underway
- The AI revolution is fully upon us...what will the future bring?
 - There is a clear need to separate facts from fiction

What's next?

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Questions & Answers



What's on your mind?



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Serving clients from offices in North America, Europe, and Asia-Pacific

World Headquarters

Ann Arbor, Michigan USA
Tel: +1.734.668.9922

EMEA Headquarters

Paris, FRANCE
Tel: +33 (0) 663.406.725

Asia-Pacific Headquarters

Tokyo, JAPAN
Tel: +81.47.361.5850

www.CIMdata.com

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