

# State of PLM: Today's Market & Leading Trends

2026 Market & Industry Forum—7 April 2026

**CIMdata**

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

**7 April 2026—Ann Arbor, Michigan USA**

*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.

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

**Leading strategic management consulting firm**

**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

# State of PLM: Today's Market & Leading Trends

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## Key Takeaways

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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 12<sup>th</sup> 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

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- 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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# State of PLM: Today's Market & Leading Trends

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### Our Contribution

**Strategic Mission & Value**  
**Facilitating the Global Ecosystem**  
 Energizes the digital landscape by defining and implementing "what's next."

**Solution Provider Engagement**  
 Empowering Sales, Marketing, and Executive teams to optimize their digital offerings.

**Expert-Driven Insights**  
 Leverages a core network of CIMdata Experts to drive ecosystem growth.

**The Critical Intersection**  
 Addresses challenges for both solution providers and industrial organizations.

**Industrial Client Support**  
 Providing strategic guidance for Executive Management, Program Management, and end-users.

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### Our Services

**RESEARCH: Driving Foresight**  
 Utilizing research, analysis, and technology evaluations to anticipate industry trends and market insights.

**EDUCATION: Developing Leadership**  
 Building expertise through conferences, certificate programs, webinars, and shared industry best practices.

**CONSULTING: Success, Invest & Transformation**  
 Achieving transformation through strategic guidance, market positioning, and aligning solutions with organizational needs.

**Market Intelligence & Analysis**  
 Focused on technology evaluations and market-specific insights to guide investment.

**Knowledge & Best Practices**  
 Disseminating industry trends and best practices through seminars and professional development.

**Strategic Guidance & Positioning**  
 Specialized advisement in program management and organizational market positioning.

**Strategic advice & counsel through a comprehensive & integrated set of services**


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### Success Methodology

 Services for software & service providers to support their drive toward market success

**STRATEGIC OBJECTIVES**

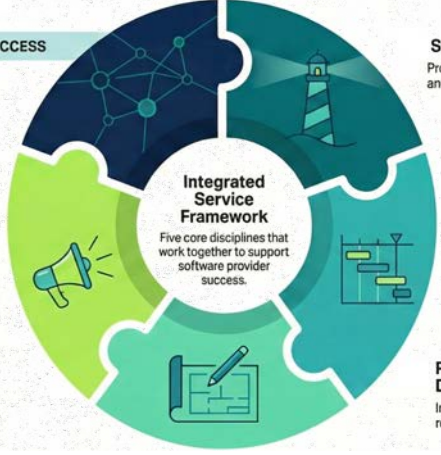


**Drive Market Growth**  
Navigate complex and dynamic markets with a structured approach to expansion.



**Competitive Advantage**  
Leverage integrated services to outperform rivals and establish market leadership.

**THE FIVE PILLARS OF SUCCESS**



**Channel Services**  
Optimizing partner ecosystems and routes to market.

**Sales & Marketing**  
Driving demand and maximizing revenue opportunities.

**Integrated Service Framework**  
Five core disciplines that work together to support software provider success.

**Strategic Support**  
Providing high-level guidance and long-term planning.

**Product & Program Management**  
Ensuring efficient execution and lifecycle oversight.

**Product & Program Development**  
Innovating and building robust solutions.

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### Select Success Clients



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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.

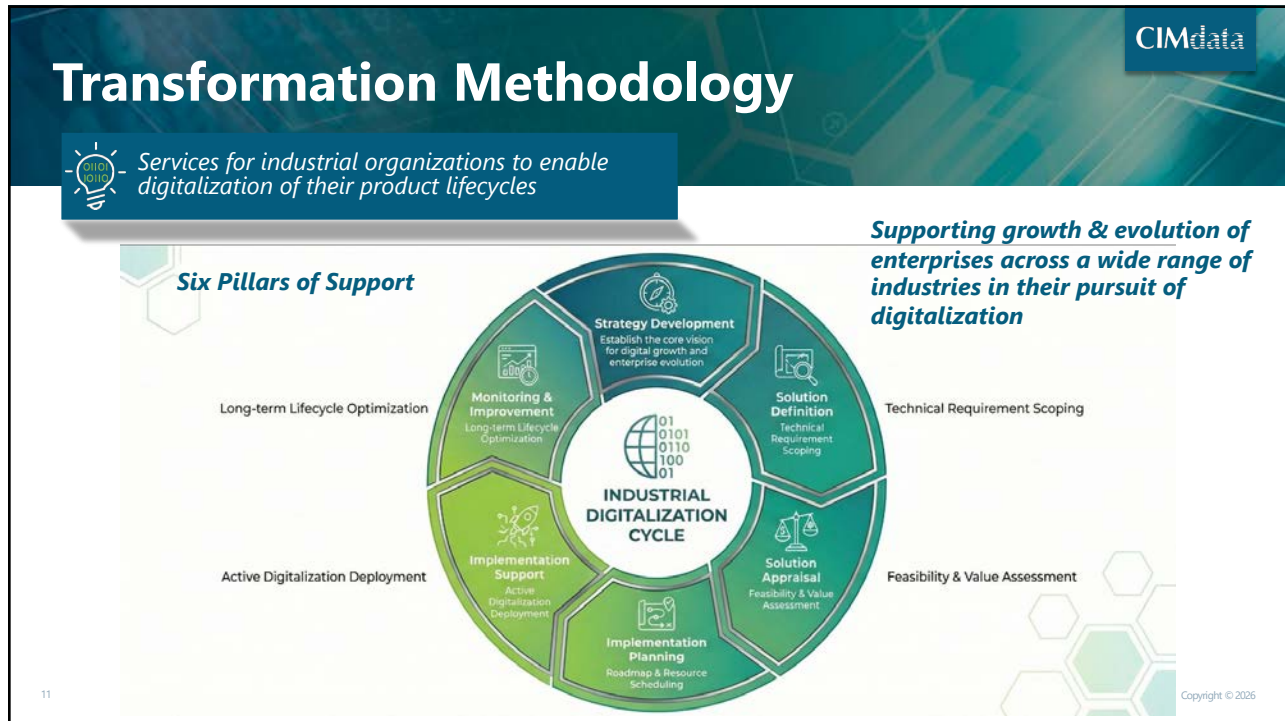
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### Sample Invest Clients

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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, Gulfstream, 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, Great Dane, nemak, RIETER, 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, MEYLN, DANABER, BOMBARDIER, 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












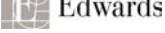





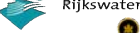





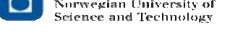
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### Select Transformation Clients


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](mailto: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.



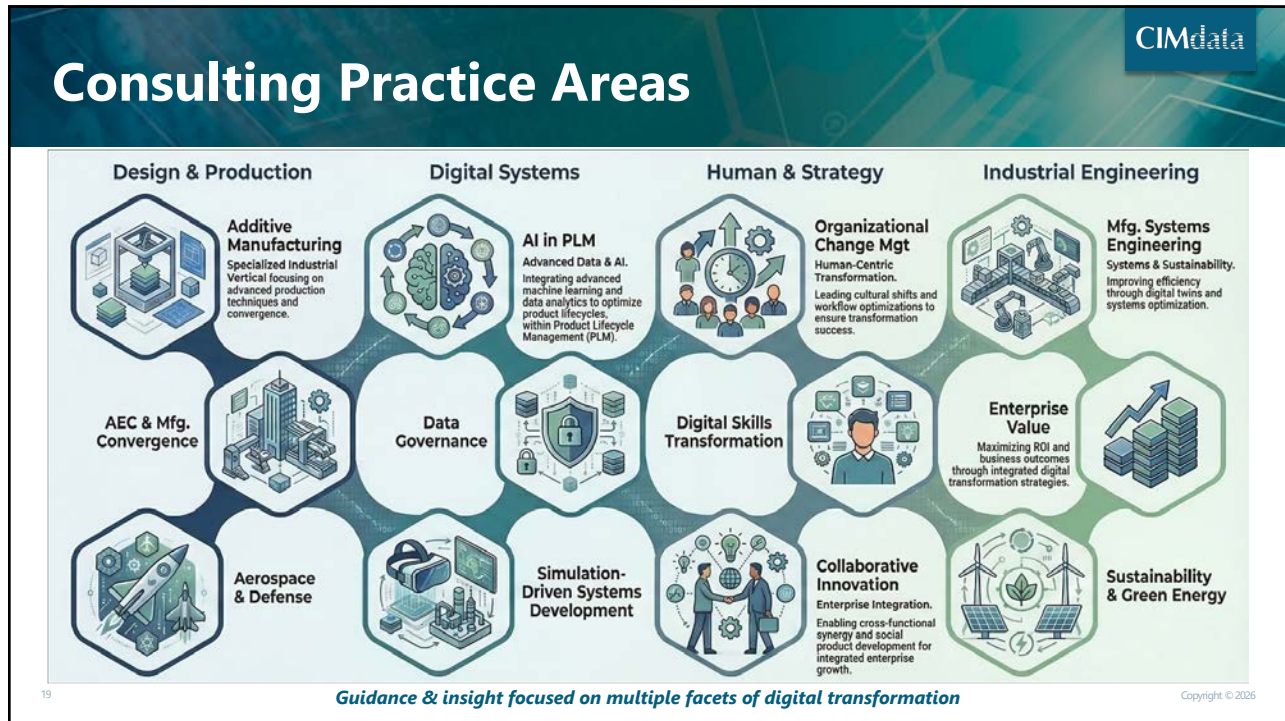
**Late-Breaking Publications**  
 Timely commentaries and news updates on the latest developments in the digital economy.

*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](http://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 33<sup>rd</sup> 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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## PLM Certificate Program Outline

**PHASE 1: STRATEGY & SOLUTION DESIGN**  
(Days 1-3)



**Day 1: Foundational Concepts**  
Establishes key PLM principles and core learning objectives for the program.

**Day 2: Strategy and Value Definition**  
Focuses on defining the PLM strategy and identifying potential business value.

**Day 3: Appraisal and Implementation**  
Covers solution appraisal, monitoring techniques, and continuous improvement protocols.

**PHASE 2: INTEGRATION & VALUE CHAIN**  
(Days 4-5)



**Day 4: Enterprise Integration**  
Develops business processes and integrates PLM across the wider enterprise.

**Day 5: Value Chain Expansion**  
Concludes by extending PLM principles across the entire external value chain.



**Customizable Learning Formats**  
Program is available through both public and private class offerings.

*More than 30 advanced half-day classes are also available.*

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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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### 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**

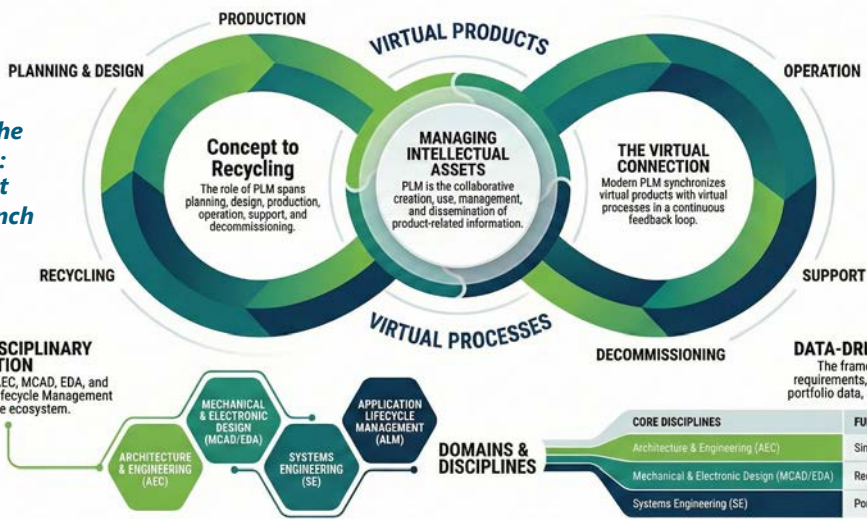
Service Management, System Ideation, System Realization, Profitability Management, Quality Compliance, Portfolio & Program Management

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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.

**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.

**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—9<sup>th</sup> 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

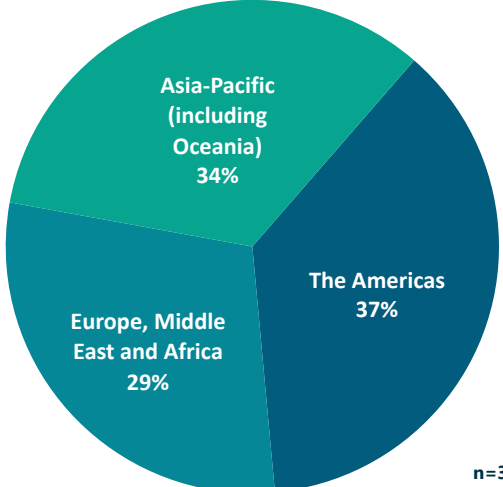
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## Respondent Demographics

 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).



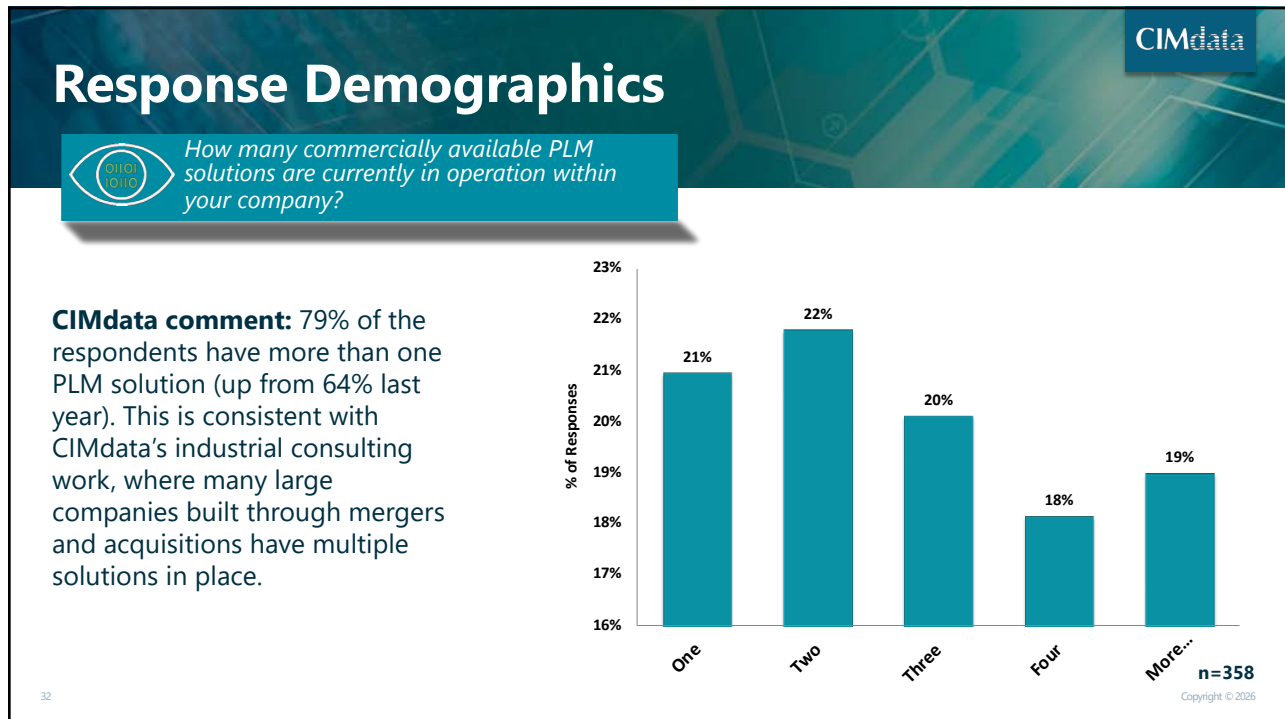
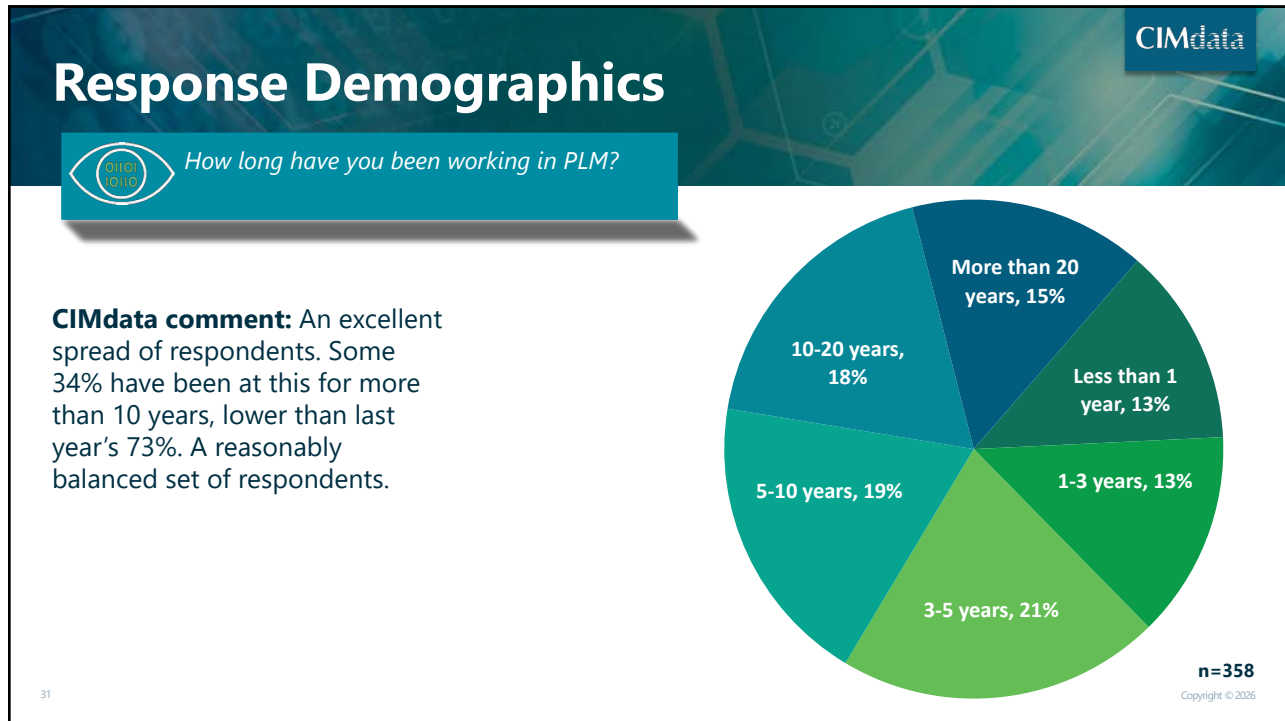
Region	Percentage
The Americas	37%
Asia-Pacific (including Oceania)	34%
Europe, Middle East and Africa	29%

n=358  
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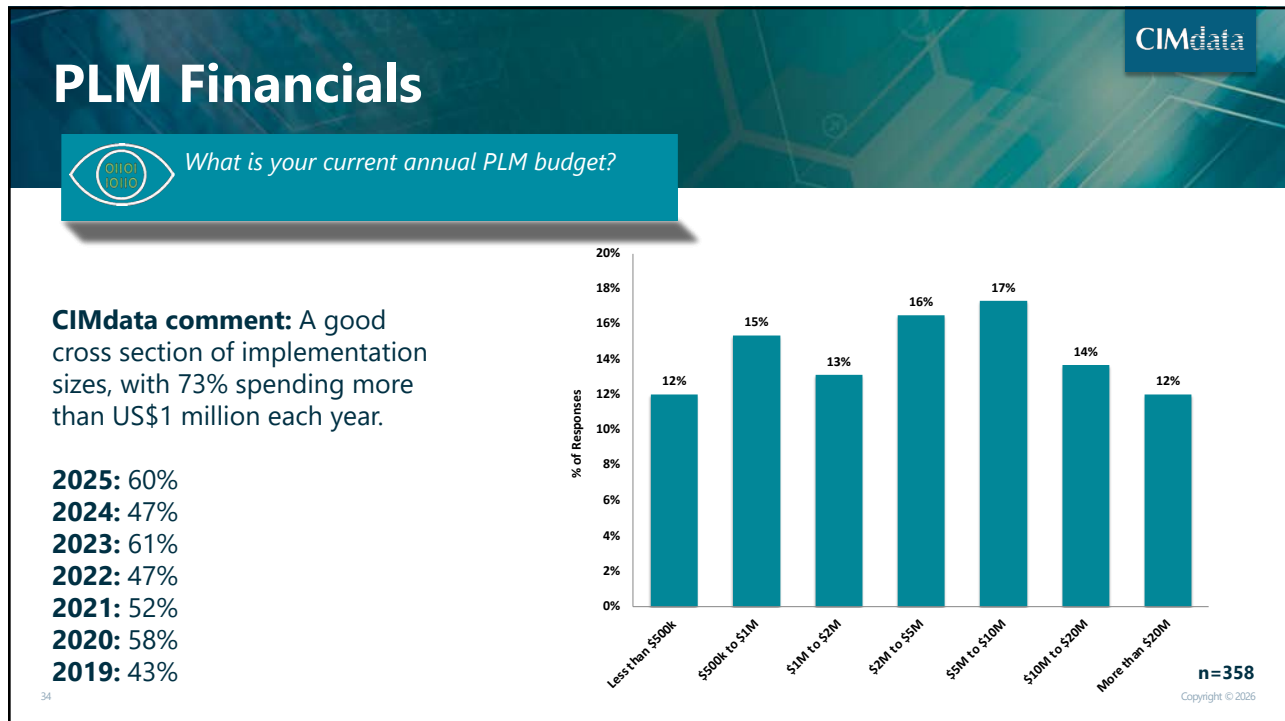
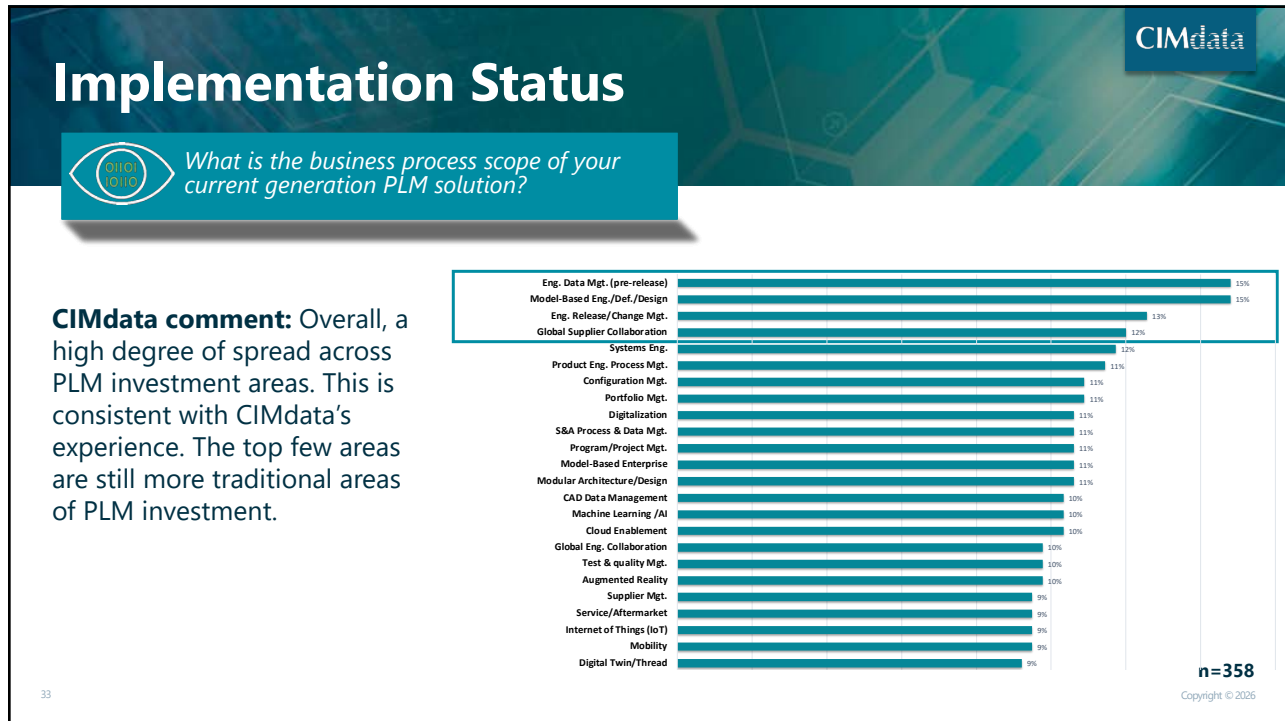
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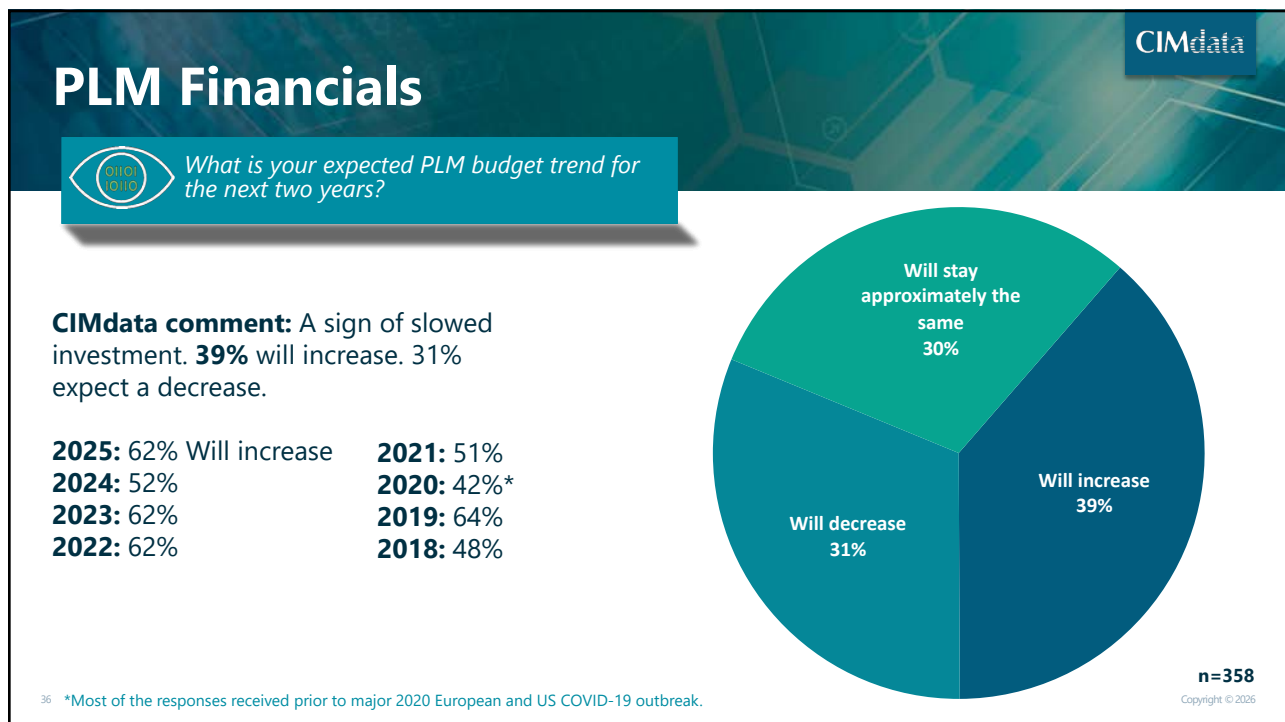
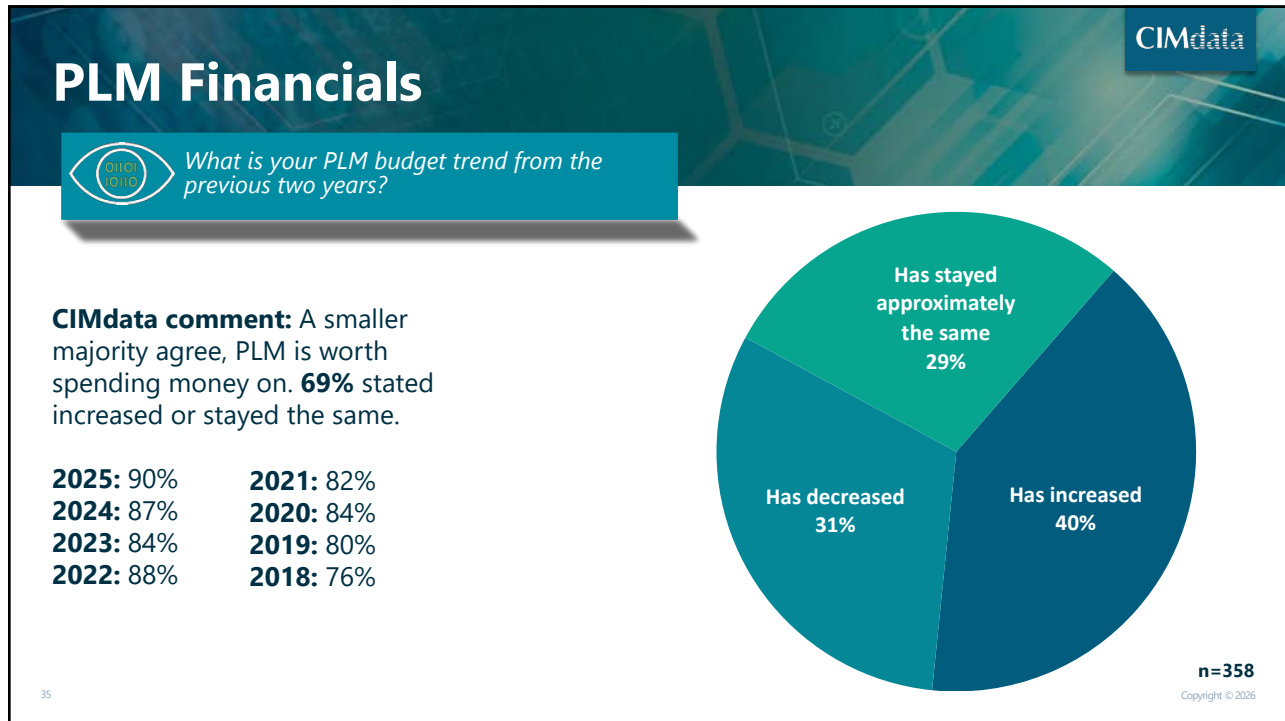
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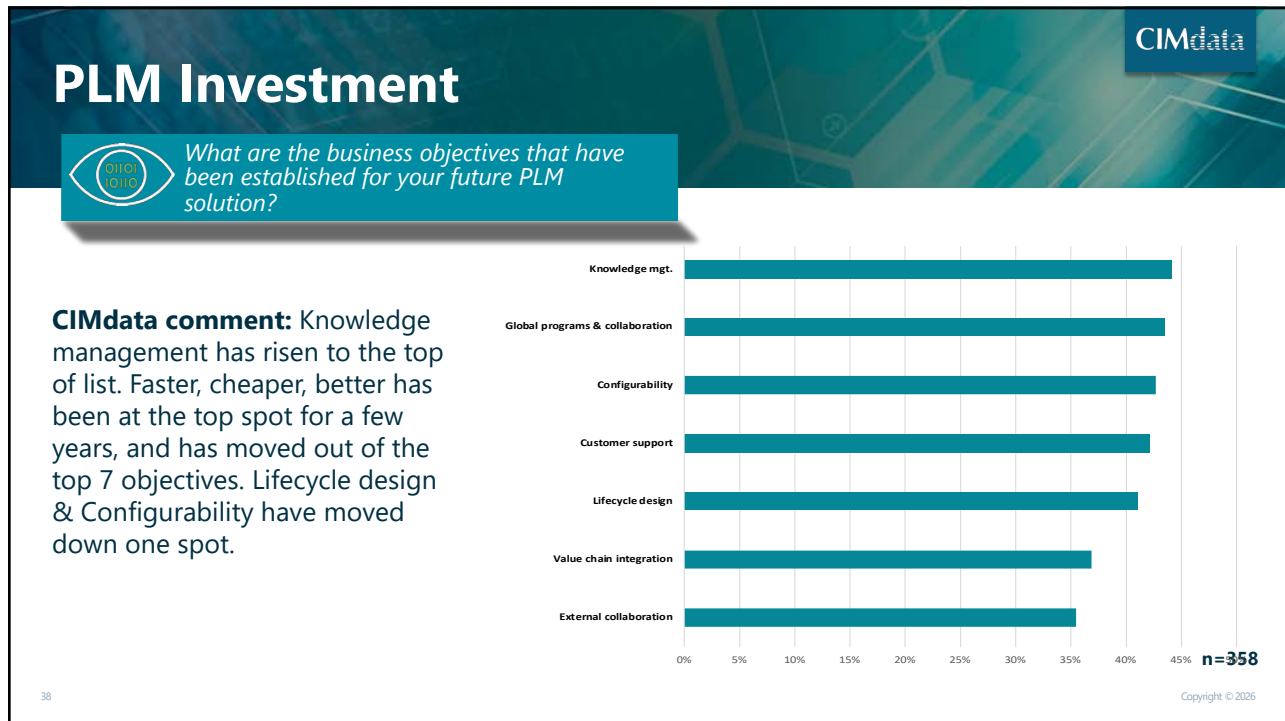
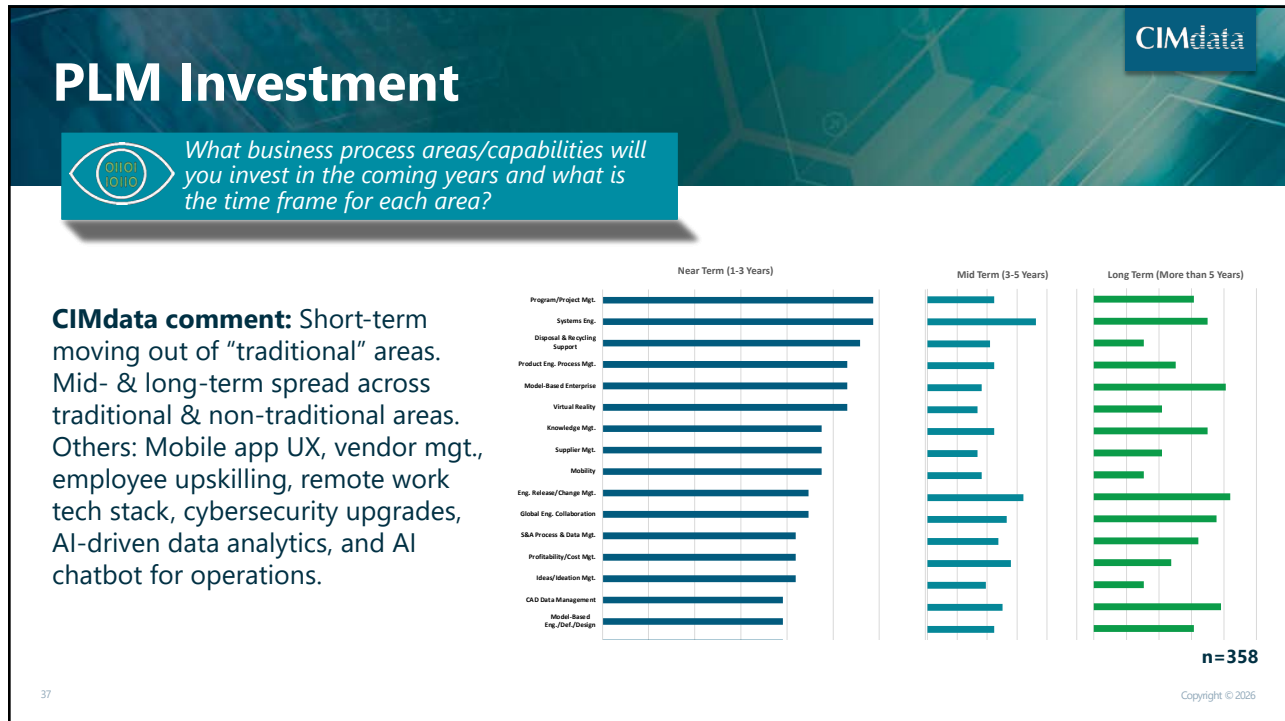
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36 \*Most of the responses received prior to major 2020 European and US COVID-19 outbreak.

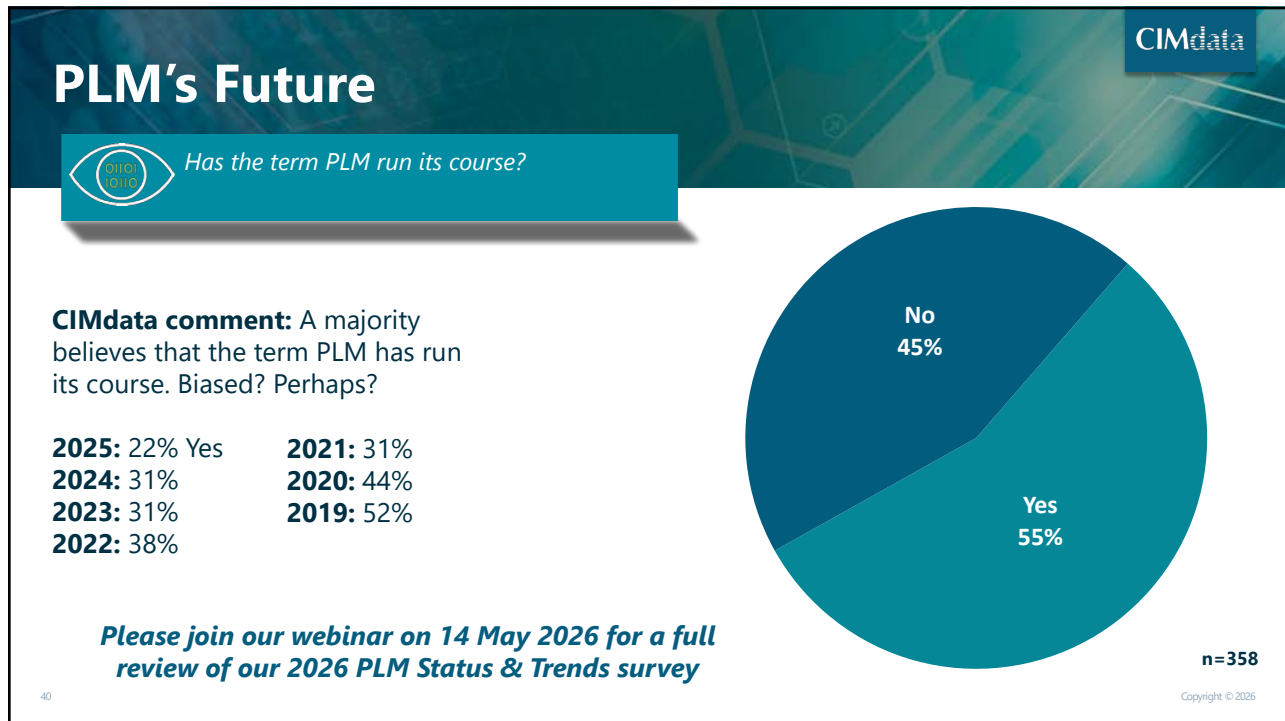
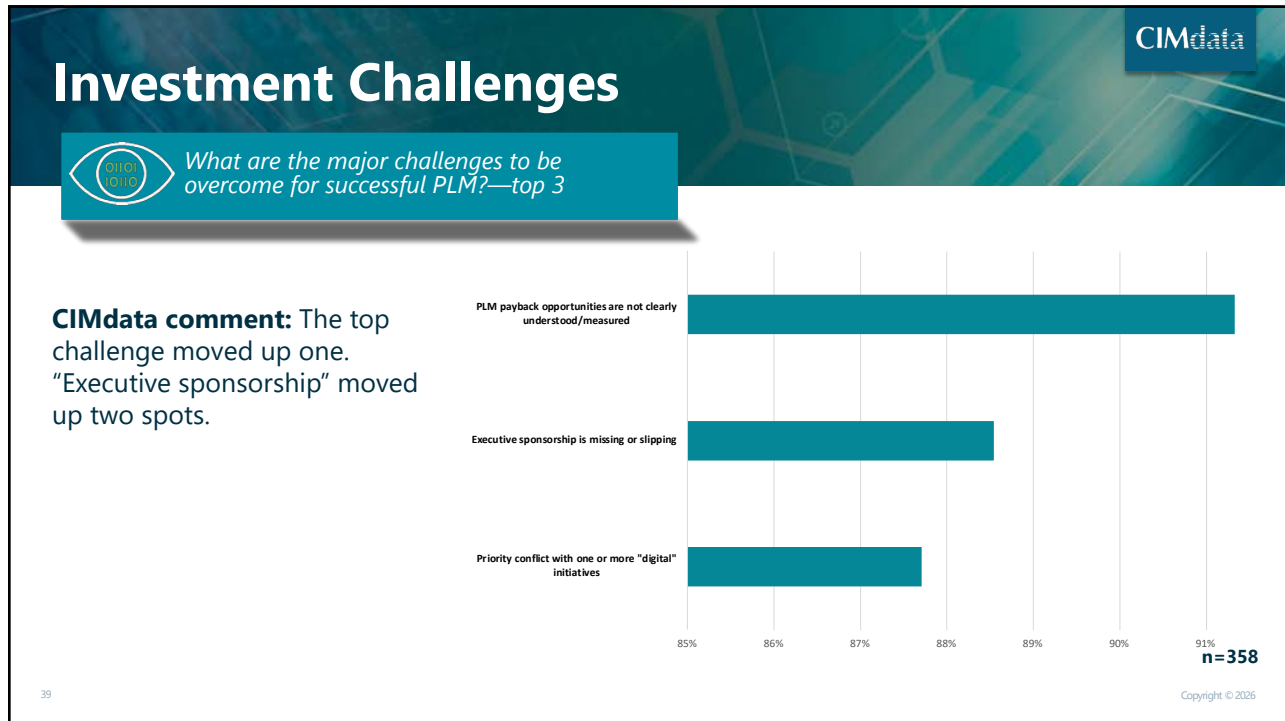
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### What CIMdata Has Been Saying


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



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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"><li>• For You, Our Clients<ul style="list-style-type: none"><li>• Real time access to released data &amp; analytics—self service access</li><li>• Access to a best-in-class enterprise analytics engine (Tableau)</li><li>• Access to current &amp; past data to better understand &amp; track trends</li><li>• Simple licensing scheme to gain access to what you need (in line with past reports structure)</li></ul></li></ul>	<ul style="list-style-type: none"><li>• For CIMdata<ul style="list-style-type: none"><li>• Controlled data entry, including change traceability</li><li>• Real time access to released data &amp; analytics throughout CIMdata</li><li>• Extendable platform with built in management &amp; scalability</li><li>• Access to a best-in-class enterprise analytics engine (Tableau)</li><li>• Able to provide different licenses</li></ul></li></ul>
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# State of PLM: Today's Market & Leading Trends

## 2026 Market & Industry Forum—7 April 2026

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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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# State of PLM: Today's Market & Leading Trends


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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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\*Previously cPDM

# State of PLM: Today's Market & Leading Trends

2026 Market & Industry Forum—7 April 2026

**Agenda** CIMdata

- 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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**CIMdata's Critical Dozen** CIMdata

**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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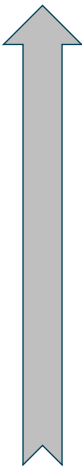


### Augmented Intelligence


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

 Artificial  
 Augmented  
 Human  
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Augmented intelligence




- **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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### 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


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# State of PLM: Today's Market & Leading Trends

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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

**01**

End-to-end connectivity

**02**

Data & process management

**03**


Configuration management

**04**

Bills of information

**05**

Model-based structures



**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.

**11**

Data governance

**10**

Augmented intelligence

**09**


Big data & analytics

**08**

Changing views of "product"


**07**

IoT & PLM



# State of PLM: Today's Market & Leading Trends

## 2026 Market & Industry Forum—7 April 2026



### CIMdata's Critical Dozen

**01**  
End-to-end connectivity

**02**  
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**03**  
Configuration management

**04**  
Bills of information

**05**  
Model-based structures

**12**  
Digital skills transformation

**06**  
Digital thread/twin

**11**  
Data governance

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IoT & PLM

**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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### 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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# State of PLM: Today's Market & Leading Trends

## 2026 Market & Industry Forum—7 April 2026

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## Agenda

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

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## Gartner's Top 2026 Trends

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### 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.

**Geopattribution**  
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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# State of PLM: Today's Market & Leading Trends

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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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# State of PLM: Today's Market & Leading Trends


## 2026 Market & Industry Forum—7 April 2026



## The Evolution of Autonomous AI Systems



*A quick primer—much more this afternoon*



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

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# State of PLM: Today's Market & Leading Trends

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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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# State of PLM: Today's Market & Leading Trends

## 2026 Market & Industry Forum—7 April 2026




## 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


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.




**Foundations and the Birth of AI (1872-1956)**



**Defining the Field**  
The term "Artificial Intelligence" was officially coined at the Dartmouth Summer Research Project.



**The Rise of Machine Mastery**



**AlphaGo and Machine Learning**  
Google's AlphaGo utilized machine learning and tree search rather than traditional human-created databases.

**1872: The Philosophical Spark**  
Samuel Butler's novel "Erewhon" first envisioned humankind being supplanted by self-replicating machines.

**1950: The Turing Question**  
Alan Turing established the core inquiry of the field: "Can computers think?"

**Moore's Law: The Engine of Progress**  
Continuous growth in computing power and storage fueled successive generations of AI solutions.


**Human vs. Machine Milestones**  
IBM's Deep Blue and Watson proved computers could outperform humans in Chess and Jeopardy.

Concept to Cognitive Mastery

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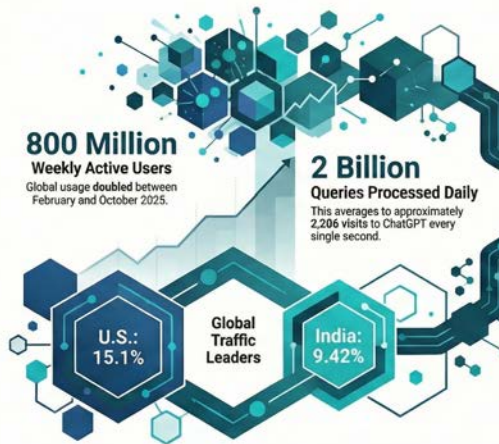
# State of PLM: Today's Market & Leading Trends

## 2026 Market & Industry Forum—7 April 2026



### Today's Theme: The AI Revolution

#### The Scale of the GenAI Explosion

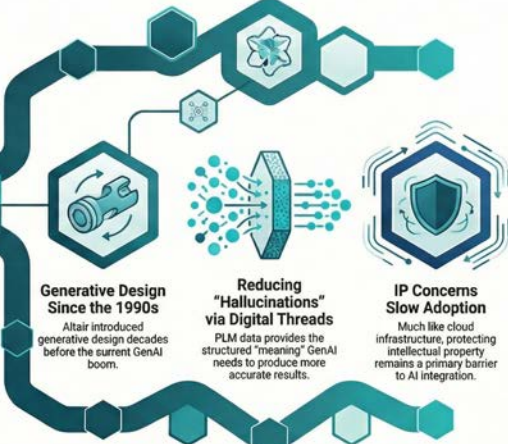


**800 Million**  
Weekly Active Users  
Global usage doubled between February and October 2025.

**2 Billion**  
Queries Processed Daily  
This averages to approximately 2,206 visits to ChatGPT every single second.

**U.S.: 15.1%**  
**India: 9.42%**  
Global Traffic Leaders

#### AI in PLM: A 30-Year Evolution




**Generative Design Since the 1990s**  
Altair introduced generative design decades before the current GenAI boom.

**Reducing "Hallucinations" via Digital Threads**  
PLM data provides the structured "meaning" GenAI needs to produce more accurate results.

**IP Concerns Slow Adoption**  
Much like cloud infrastructure, protecting intellectual property remains a primary barrier to AI integration.

*From ChatGPT's Surge to PLM Integration*


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### Today's Theme

CIMdata's 2026 Forum explores how the 'PLM Economy' is scrambling to embed AI innovation. The event analyzes the application of AI through a global study targeting industrial users, software providers, and service providers to define the framework for future product lifecycles.

#### The Three Communities of the PLM Economy



**Industrial Users**  
Companies applying AI technology to their internal business processes and manufacturing workflows.

**Service Providers**  
Expert firms focused on helping industrial companies reach their specific AI objectives.


**Software Providers**  
Technology creators embedding AI innovation directly into their PLM product offerings.


#### Core Themes & Value Drivers

**Digital Twin & Digital Thread**  
Evaluating the value potential of connected data across the entire product lifecycle.


**News from the Field**  
Direct highlights and learnings from CIMdata's recent global industrial consulting work.

**Evolution from Augmented Intelligence**  
The 2026 focus builds upon the framework established during the 2019 Forum.

  
**2019 Forum**  
(Augmented intelligence)

  
**2026 Forum**  
(AI in PLM)

#### CIMdata's Thematic Leadership History



**1980s-Present**  
40+ Years of Industry Moderation

**2019 Forum**  
Augmented Intelligence

**2026 Forum**  
AI in PLM: Expanding Capabilities

*Expanding AI Capabilities Across the Product Lifecycle*

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# State of PLM: Today's Market & Leading Trends

## 2026 Market & Industry Forum—7 April 2026



### Today's Agenda

 2026 PLM Market & Industry Forum (1 of 2)

- **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**  
*James Roche, Vice President, Aerospace & Defense Practice*
  - **News from the Field**  
*Peter Bilello, President & CEO*
- **Closing Comments**

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# State of PLM: Today's Market & Leading Trends

## 2026 Market & Industry Forum—7 April 2026



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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 12<sup>th</sup> 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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# State of PLM: Today's Market & Leading Trends

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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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**CIMdata** Defining What Comes Next in Digital Transformation



Strategic management consulting for  
competitive advantage in global markets

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