

# AI Overview

2026 Market & Industry Forum—9 April 2026

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**AI Overview**  
**PLM Market & Industry Forum**  
**A CIMdata Leadership Event**

**9 April 2026—Paris, FRANCE**

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**#PLM4um**

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

**Cross-Industry Digital Impact**

**Industry Verticals:** Aerospace, Automotive, Computing, Construction, Manufacturing, Logistics, Healthcare, Retail, Global Communication.

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

**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.

**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

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## Key Takeaways



- 01 LLMs Don't Reason—They Predict**

Hallucinations aren't bugs; they're the architecture working as designed. Grounding is a prerequisite, not optional.
- 02 The Market Is Confusing Itself**

Three conflations are muddling AI strategy: AI vs. GenAI, Conversational AI vs. Agentic AI, Demo vs. Deployment.
- 03 AI Won't Replace PLM—It Layers Onto It**

The threat is real but surgical. Core engineering stack is protected; the knowledge-work layer is exposed.
- 04 You Need a Shared Framework**

"AI strategy" means different things across the ecosystem. Five implementation patterns give you a common vocabulary.
- 05 The Data Will Challenge Assumptions**

118 respondents across 3 regions. The global study benchmarks all three sides—gaps between them are commercially significant.

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## The Opportunity



The PLM market reached US\$87.3B in 2025—an 8.7% increase. AI investment across every cohort is growing. Nobody is pulling back.

**But investment and results are not the same thing.**

-  **A shared map** of the AI landscape in PLM
-  **A framework** for making strategic decisions within it
-  **An introduction** to the first global study on AI across all three sides of this ecosystem

*This is not an AI tutorial. It is a calibration exercise.*

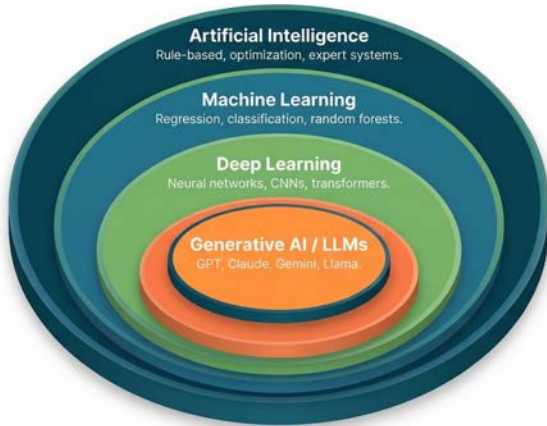
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## The AI Landscape



### What LLMs can do:

- LLMs predict the next most probable token given a sequence. They do not reason, plan, or understand.
- Every response is a statistically plausible completion, not a verified answer.

### Practical implication:

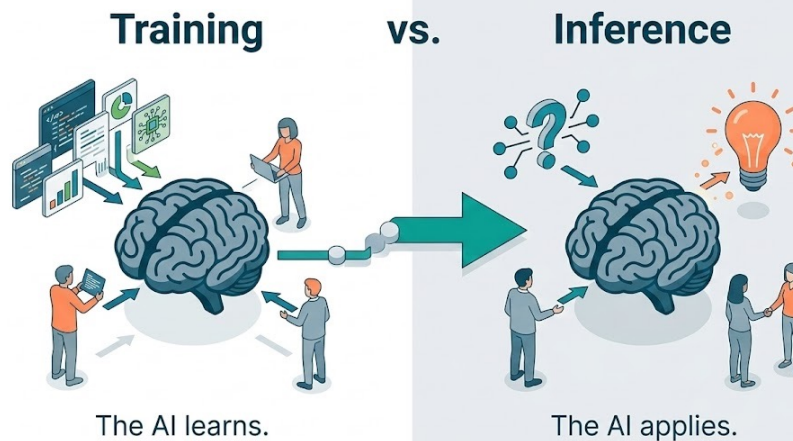
- Hallucinations are not bugs. They are the architecture working as designed.
- Grounding and validation infrastructure are prerequisites for enterprise deployment, not optional additions.

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## Training vs. Inference



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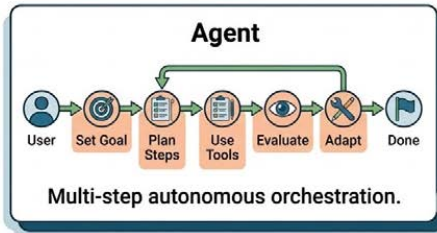
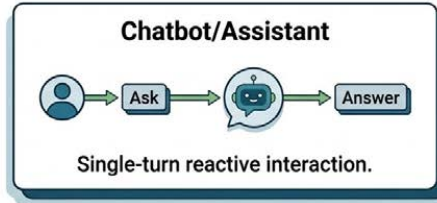
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## What Makes Something an Agent



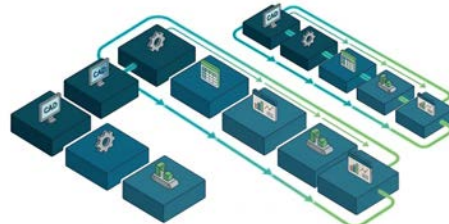
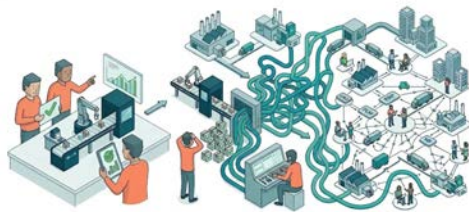
A workflow with an AI decision node is not an agent. It is a workflow.

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## The Reality Gap



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## Grounding AI Manually

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## Grounding AI Automatically: RAG

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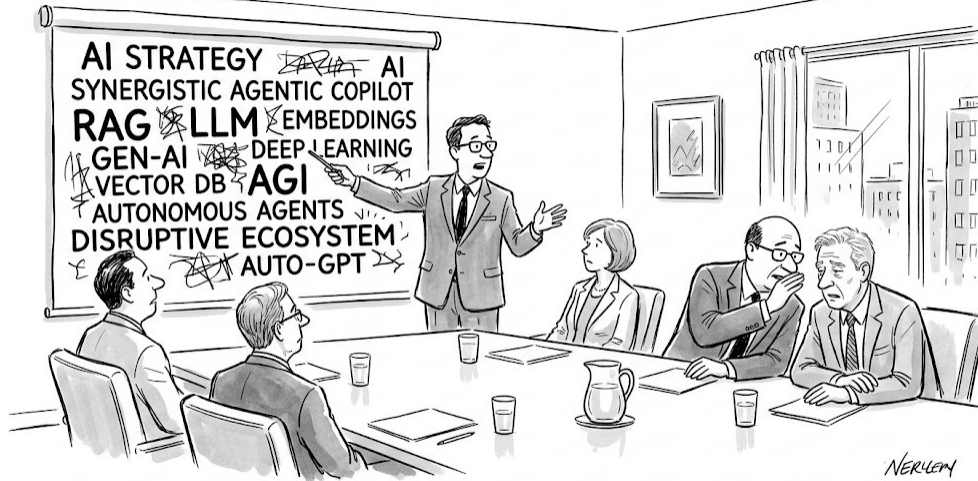
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## The AI Confusion Problem in PLM



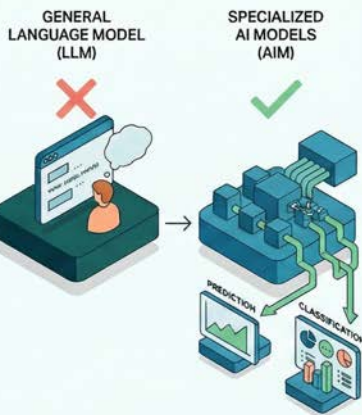
*'I stopped understanding at synergistic agentic copilot.'*

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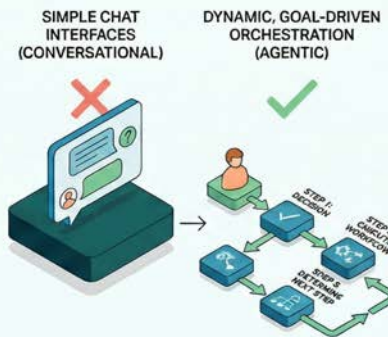
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## Often Confused Terms

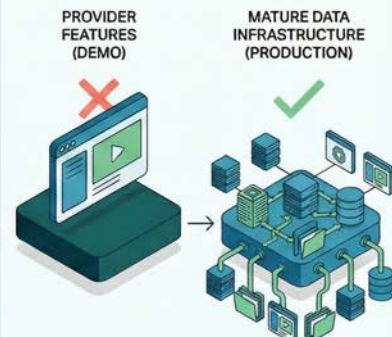
### 1. LLM ≠ AI



### 2. Conversational AI ≠ Agentic AI



### 3. Demo ≠ Production




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## What the Market is Hearing

Separating fact from fiction (1 of 2)

*“AI could replace more than 50% of enterprise software spending”*

*“The traditional app stack will collapse in favor of AI-driven workflows”*

*“Agentic AI eclipses the SaaS model; the No-UI future means screens become optional”*


*“The SaaS-to-AI transition is the next perpetual-to-SaaS moment”*

THE COMMON FLAW


None of these claims were made about **engineering software**

The PLM Economy needs a sharper read on what AI can and cannot displace in an industrial context

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## CIMdata's Read: AI & PLM Solutions

Separating fact from fiction (2 of 2)

**The threat is real—but surgical**

- Knowledge work layer (reports, compliance docs, change summaries) is genuinely exposed to AI displacement
- Core engineering stack (BOM, configuration control, ECN, CAD data) is protected by decades of domain-specific logic in certified, regulated workflows

**You don't replace a PLM platform with AI—you add AI to it**

- Rebuilding the rules embedded in existing PLM systems via AI agents would take years and reproduce what already exists
- The large PLM providers are not being disrupted; they are embedding AI into their existing systems

**Business model pressure arrives before product pressure**

- If engineering teams automate documentation with AI, they have a case to push back on seat counts and price increases
- The pricing question is real and unresolved—Session 3 examines the monetization data

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## Why a Shared Framework

**THE PROBLEM**  
**"AI strategy" means something different to each of us.**  
 Product managers build roadmaps. SIs scope engagements. Analysts make assessments—all using inconsistent definitions.

**THE SOLUTION**  
**CIMdata's AI Implementation Patterns**  
 Four strategic lenses that give every stakeholder a common reference point—from roadmap to RFP.  
*— Four patterns. One shared language.*

- 1 Common Vocabulary**  
A shared language for conversations across the ecosystem
- 2 Build / Buy / Partner**  
A decision tool for evaluating strategic sourcing options
- 3 Provider Positioning**  
A map showing where each provider's AI offering sits
- 4 SI Engagement Design**  
A scoping anchor for structuring consulting engagements

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## AI in PLM Implementation Patterns



### 1. Solution Provider-Delivered AI

AI embedded within a software provider's solution.



### 2. Customer-Built RAG

Aggregates data from multiple systems for retrieval.



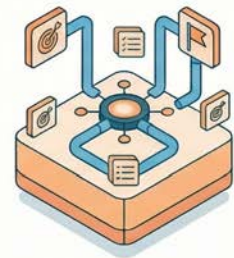
### 3. Customer-Trained Model

Custom ML models trained on customer data.



### 4. AI-Augmented Workflows

Static, pre-defined workflows invoking AI.



### 5. Agentic AI Workflows

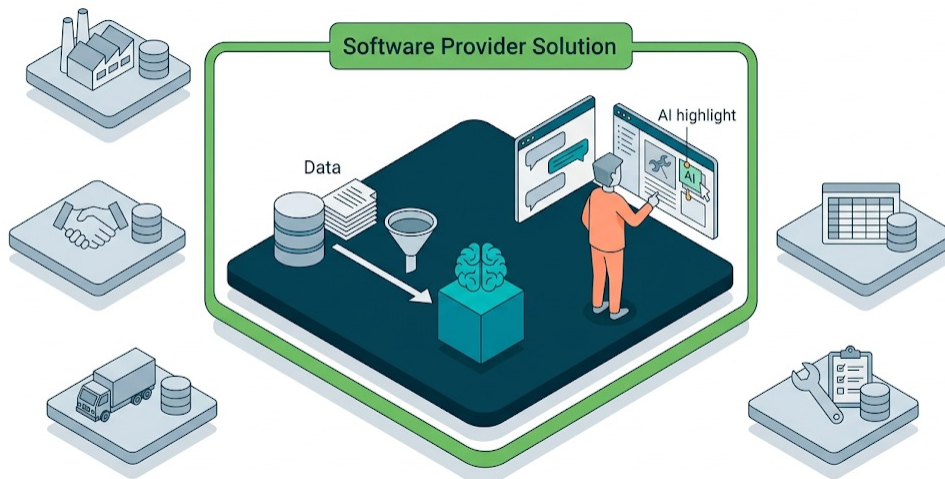
Dynamic, goal-driven orchestration by an AI agent.

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## Pattern 1: Solution Provider-Delivered AI



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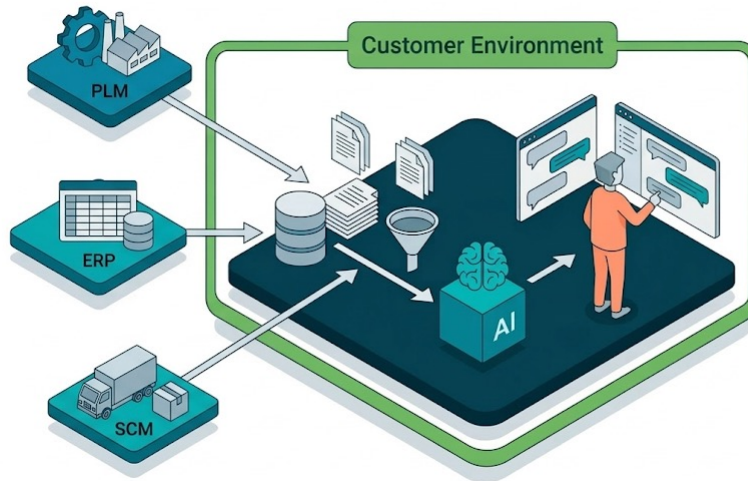
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## Pattern 2: Customer-Built RAG



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## Pattern 3: Customer-Trained Model

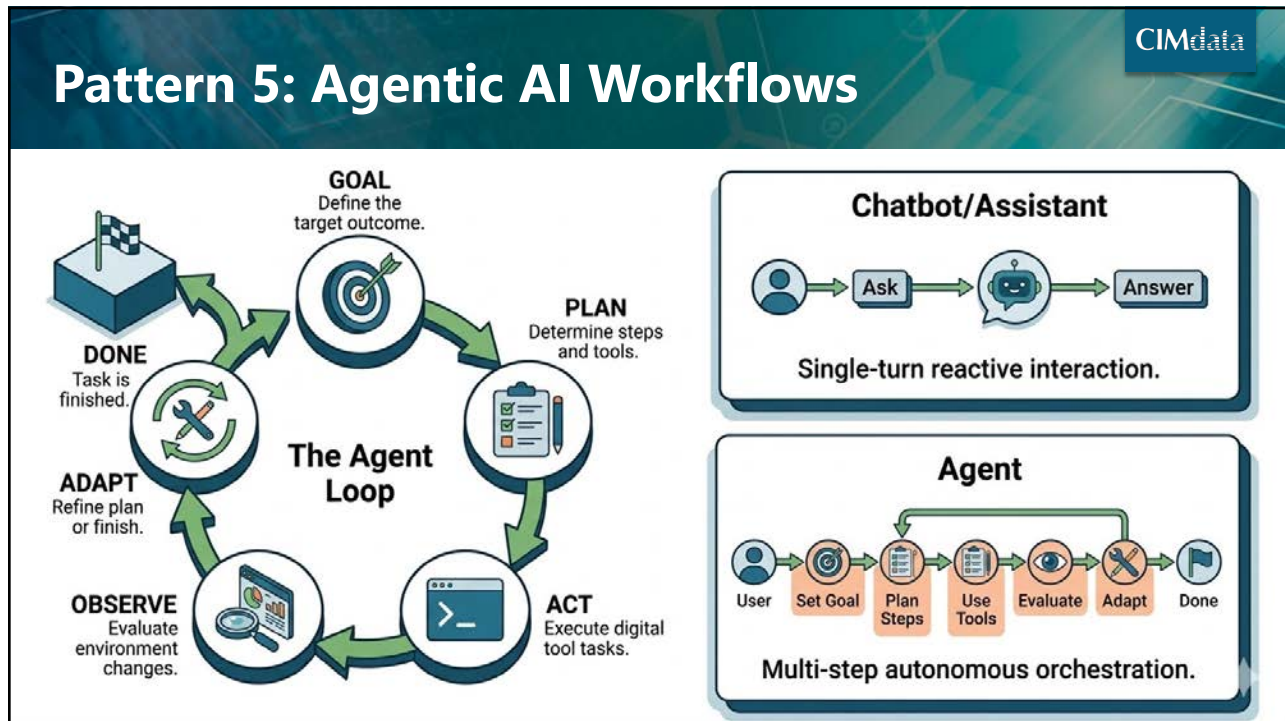
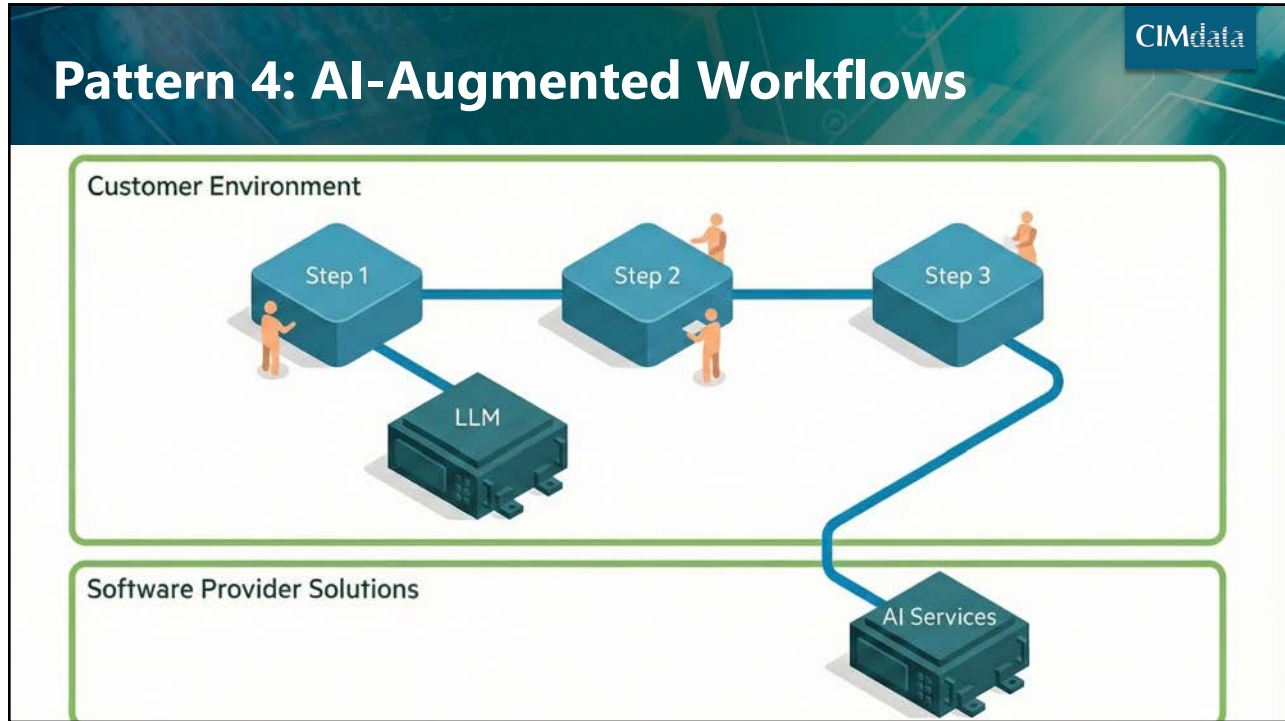


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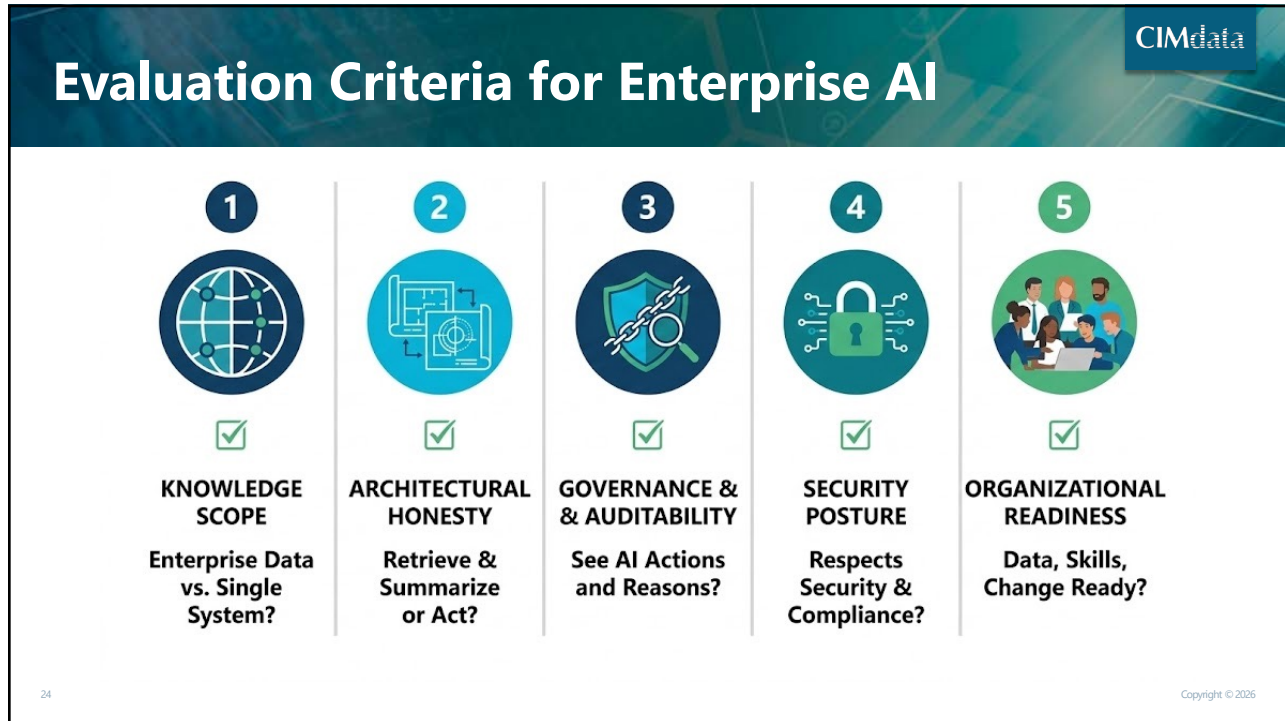
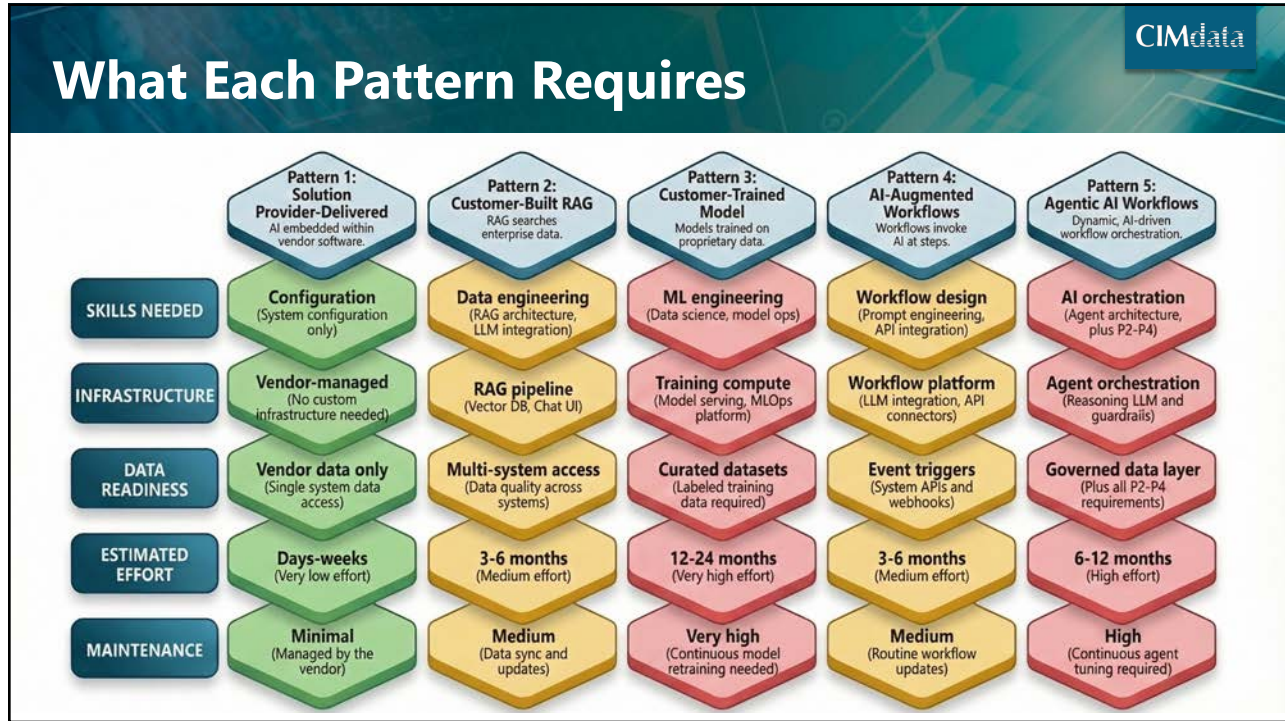
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## AI in PLM Study

**WHAT IS THIS STUDY**

The **first global, independent study** to benchmark the **current state and future direction of AI in PLM**—surveying industrial clients, software providers, and service providers.

**118** Respondents  
**3** Global Regions · Americas, EMEA, APAC  
**Q1** 2026 · Fielded

**WHY THIS STUDY**

- Software providers** know their roadmaps, but not what customers are experiencing
- Industrial customers** know their deployment reality but not how providers are thinking about the next three years
- Service providers** operate closest to ground truth—but their perspective has never been systematically captured alongside the other two

*"This asymmetry is commercially costly. This study measures it."*

## Why Three Perspectives

The diagram consists of three overlapping circles: a green circle for 'Industrial Companies', a blue circle for 'Software Providers', and a light blue circle for 'Service Providers'. The intersections between these circles are highlighted with lines, and a blue arrow points from the central intersection area to the list of benefits on the right.

- Reveals demand vs. supply gaps
- Shows what works in practice vs. theory
- Enables comprehensive gap analysis
- Provides actionable intelligence for all stakeholders

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**How to Read the Next Two Sessions**

Your guide to what follows *Two sessions. One data set. One through-line.*

**SESSION 2**  
**AI in Industry**

**Your customer intelligence**  
What industrial companies are experiencing—where they are in the journey, what is blocking them, and what benefits they are realizing, including some nobody predicted.

**Three dimensions**  
→ **Journey stage:** where companies are → **Barriers:** what is slowing adoption → **Payoff:** benefits realized

**SESSION 3**  
**AI in the PLM Economy**

**A mirror**  
How the PLM Economy's understanding of customers compares to what customers report—and where the gaps create both risk and opportunity.

**Two lenses**  
→ **Software providers:** what they believe customers need → **Customers:** what they experience  
→ *The PLM Economy shapes what industrial customers get. This session shows where that relationship needs recalibration.*

The benchmark data will confirm some assumptions in this room and challenge others. **The providers who take the calibration findings seriously will have an information advantage.**

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## Concluding Remarks

<p><b>01</b></p> <p><b>LLMs Don't Reason—They Predict</b></p> <hr/> <p>Hallucinations aren't bugs; they're the architecture working as designed. Grounding is a prerequisite, not optional.</p>	<p><b>02</b></p> <p><b>The Market Is Confusing Itself</b></p> <hr/> <p>Three conflationations are muddling AI strategy: AI vs. GenAI, Conversational AI vs. Agentic AI, Demo vs. Deployment.</p>	<p><b>03</b></p> <p><b>AI Won't Replace PLM—It Layers Onto It</b></p> <hr/> <p>The threat is real but surgical. Core engineering stack is protected; the knowledge-work layer is exposed.</p>	<p><b>04</b></p> <p><b>You Need a Shared Framework</b></p> <hr/> <p>"AI strategy" means different things across the ecosystem. Five implementation patterns give you a common vocabulary.</p>	<p><b>05</b></p> <p><b>The Data Will Challenge Assumptions</b></p> <hr/> <p>118 respondents across 3 regions. The global study benchmarks all three sides—gaps between them are commercially significant.</p>
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