

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

2026 Market & Industry Forum—7 April 2026

**CIMdata**

**AI in the PLM Economy**  
**PLM Market & Industry Forum**  
 A CIMdata Leadership Event

**7 April 2026—Ann Arbor, Michigan**

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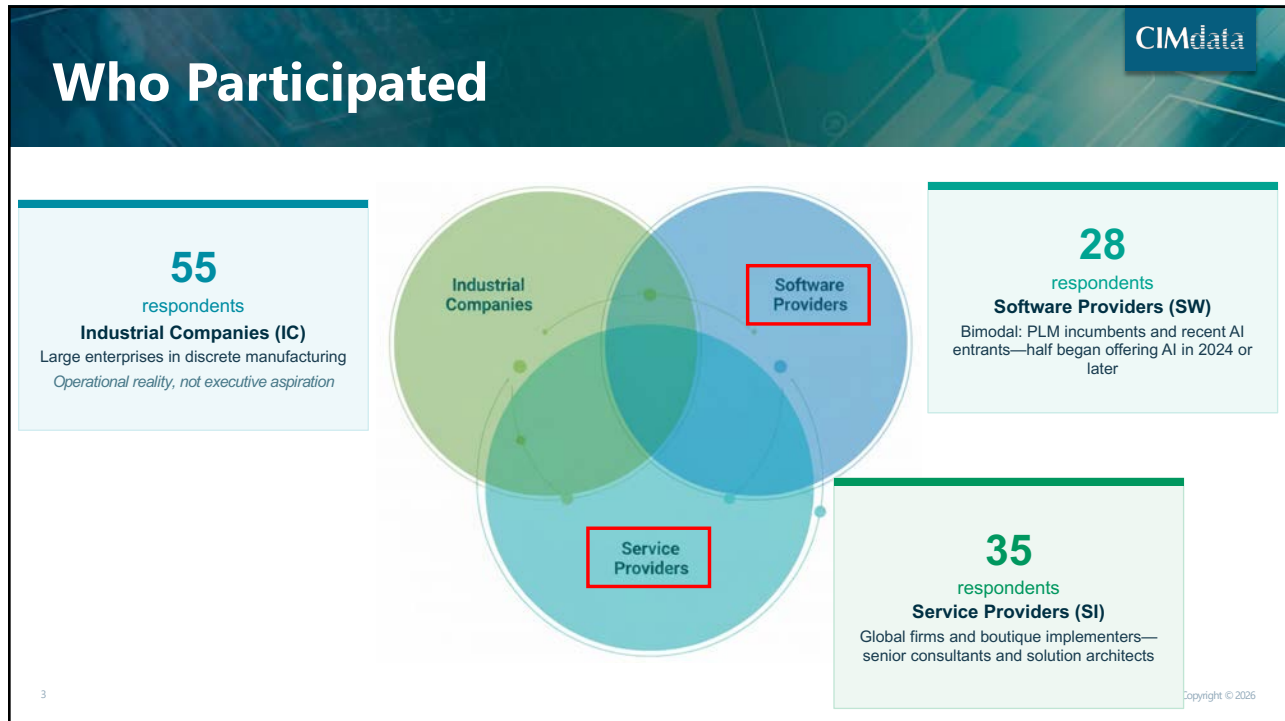
**Industry Verticals & Core Focus Areas**

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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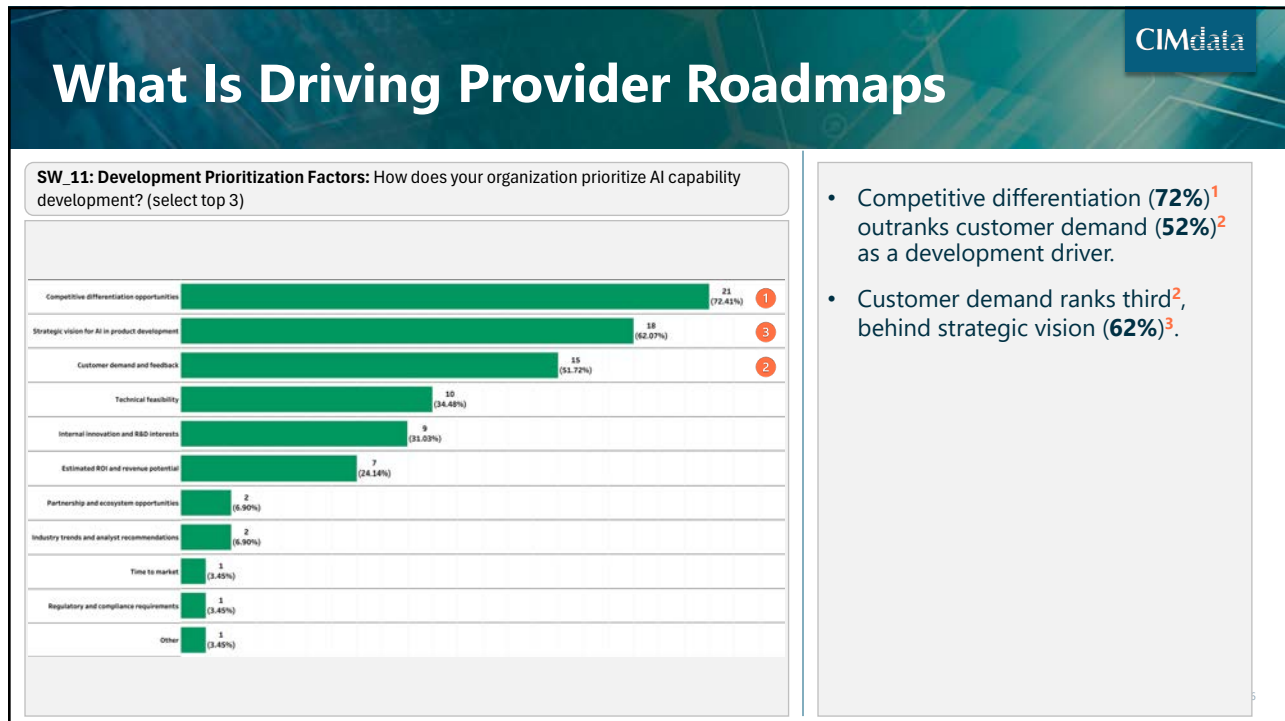
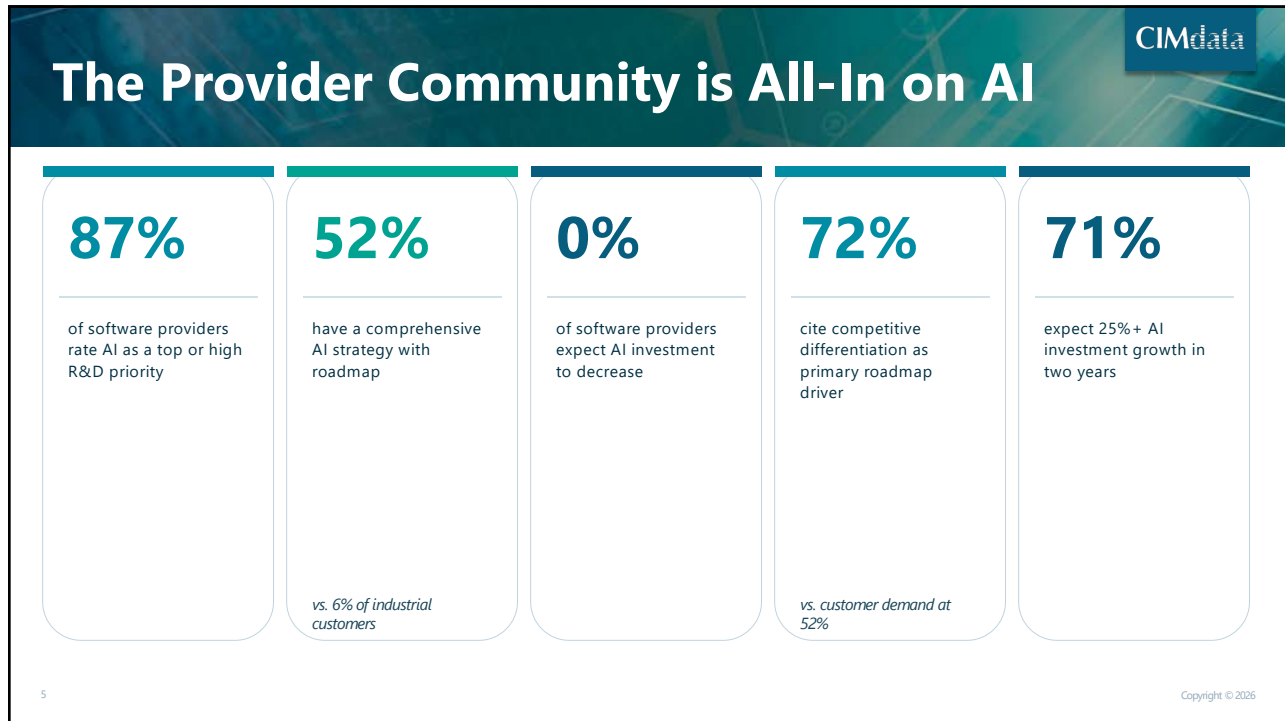


**Key Takeaways**

- 01 Providers Are All-In — Customers Are Not**
  - 87% of software providers rate AI as top or high investment priority.
  - 45% of customers say 3+ years or never to standardize AI—a 2-year planning gap.
- 02 AI Monetization Remains Unsolved**
  - No dominant pricing model.
  - 49% of customers cite ROI as top selection factor; 31% of software providers cite demonstrating ROI as a top monetization challenge.
- 03 Governance Is the Provider Blind Spot**
  - 0% of software providers cite governance as a top challenge in developing and delivering AI capabilities.
  - Meanwhile, 68% of customers cite IP protection as #1 governance concern.
- 04 Integration Is #1 for Customers**
  - Integration is a top-3 selection factor for 62% of customers, making it #1 overall.
  - Only 46% of software providers (-16 pts) and 30% of service providers (-32 pts) agree.
- 05 The Innovation Disconnect**
  - 28% of customers and 36% of software providers report innovation as a realized benefit of AI
  - However, 0% of software providers expect customers will prioritize AI for innovation over the next 2-3 years.

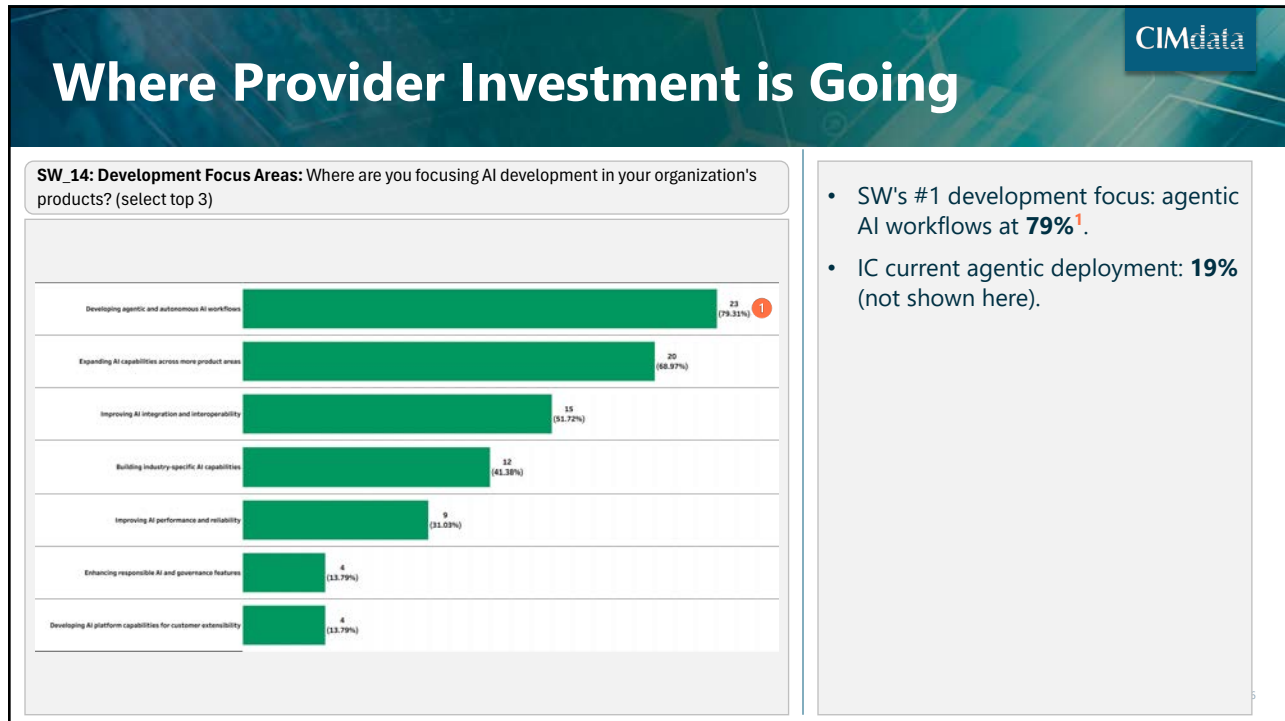
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## The State of AI Monetization

**Nobody has cracked AI monetization in PLM yet—and the data shows why**

**NO DOMINANT PRICING MODEL**  
 Hybrid 24% · Add-on 24% · Usage-based 10% · 0% outcome-based or platform fee pricing

No consensus: software providers are trialing at least four models simultaneously

**THE BUNDLING TRAP**  
 33% of customers prefer bundled pricing · only 10% of SW delivers it

28% of software providers cite customers expecting AI in base product as a top challenge

**THE COMPETITIVE DRIVER BACKFIRES**  
 72% invest to differentiate · 81% of customers not yet using agentic AI

Building ahead of adoption makes the ROI story harder to tell

**THE ROI CATCH-22**  
 49% of customers cite ROI as top selection factor · 31% of SW cite demonstrating ROI as a top monetization challenge.

Both sides are waiting for the other to move first — a structural deadlock on AI value capture


**THE STRUCTURAL CHALLENGE STACK**  
 Cost uncertainty 38% · Price pressure 34% · No benchmarks 34% · High infra costs 34% · Unpredictable consumption 34%

Five converging headwinds—all near 34–38%—with no clear fix on the horizon

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### The Timeline Disconnect

# 94%


of software providers expect AI to be standard in their portfolio within two years

# 45%

of industrial customers say "3+ years" or "never" to become a standard part of their product development workflow

**0 software providers selected "5+ years" or "never"**

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### The Timeline Distribution


**IC\_06/SW\_05/SI\_05: Timeline to Standardization:** By when do you expect AI to become a standard part of your organization's product development workflow? (select one)

Timeline	Industrial	Software	Services
Already is today	5 (7.81%)	11 (35.48%)	5 (11.90%)
Within 1 year	7 (10.94%)	5 (16.13%)	10 (23.81%)
1-2 years	19 (29.69%)	13 (41.94%)	13 (30.95%)
3-5 years	10 (31.25%)	1 (3.23%)	8 (18.05%)
More than 5 years	6 (9.38%)	0 (0.00%)	3 (7.14%)
Never / Not planning this	3 (4.69%)	0 (0.00%)	2 (4.76%)
Don't know	4 (6.25%)	1 (3.23%)	1 (2.38%)

- SW clusters at "Already today" (35%)<sup>1</sup>.
- IC distributes across 1-2 years, 3-5 years, and 5+ years<sup>2</sup>.
- The IC tail (14% at 5+ years or never<sup>3</sup>) has no SW equivalent.

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### Where the Calibration is Strong


**Not all divergence – provider field experience is producing real accuracy**

SW maturity barrier scores match IC self-assessed maturity on 4 of 6 dimensions with near-exact precision:

Area	SW Score	IC Score	Delta	Match Status
Technical AI Skills	2.83	2.82	0.01	Near-exact match
Data Engineering	2.78	2.77	0.01	Near-exact match
AI Strategy	2.66	2.68	0.02	Near-exact match

- Three-way alignment on core application areas: requirements management, search/knowledge, concept development
- These calibration successes reflect real deployment experience – SW field knowledge is working

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### Validation Confidence

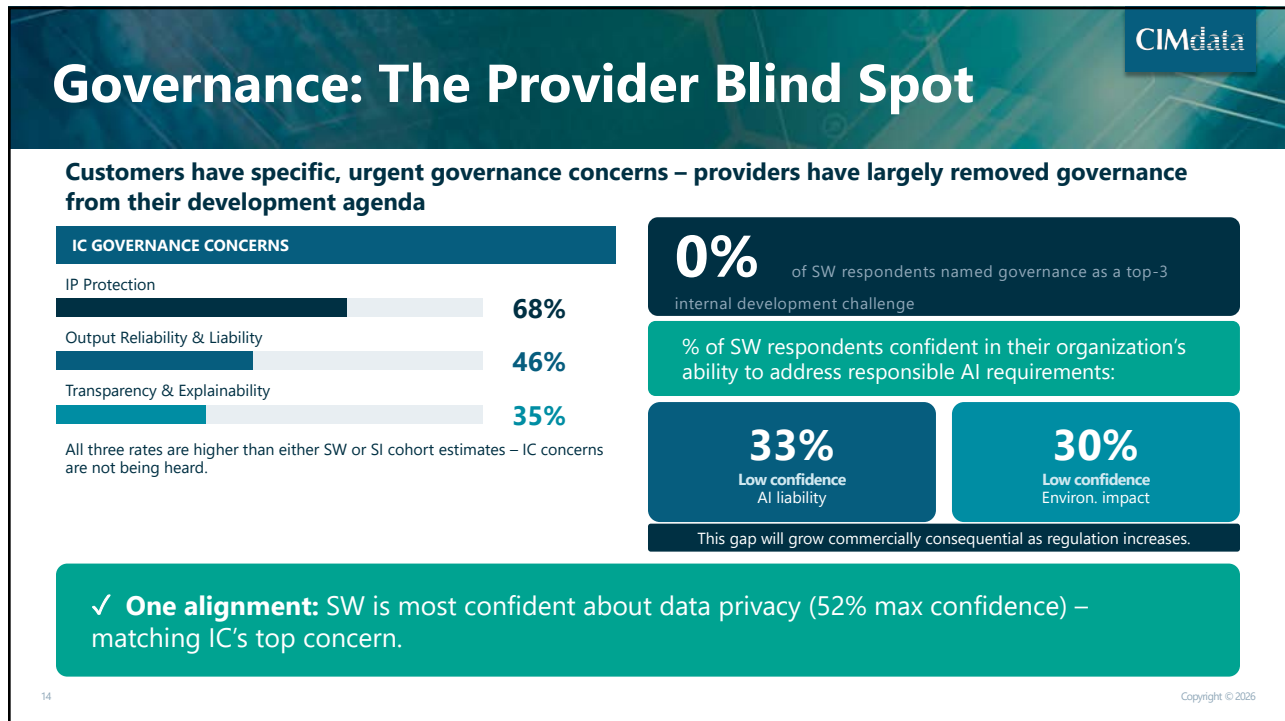
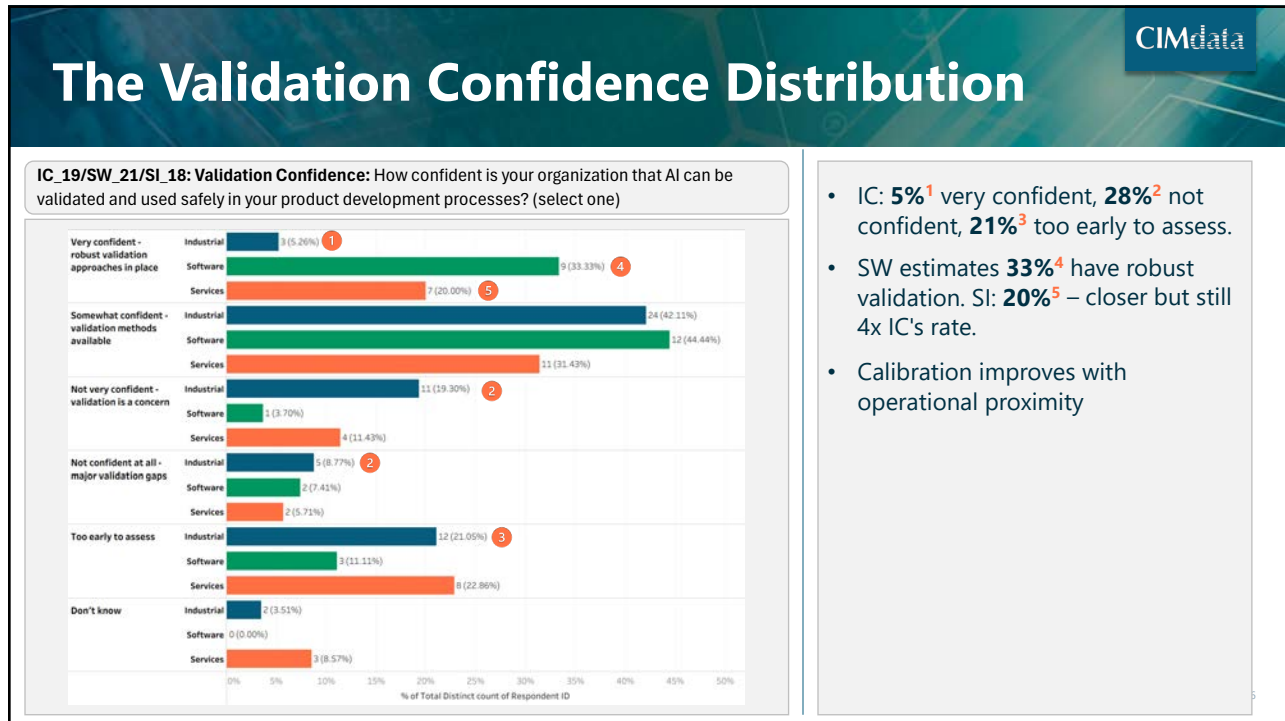
<h1>5%</h1> <p>Of industrial customers are “very confident” they can validate AI outputs</p>	<h1>33%</h1> <p>Of software providers believe their customers have robust validation approaches</p>
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**A 6x gap**

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### The Barrier Mismatch

**IC\_18/SW\_22/SI\_20: Adoption Challenges:** What are the biggest challenges your organization faces with AI adoption in product development? (select top 3)

	Industrial	Software	Services
DATA - Data quality issues (incomplete, inconsistent, or inaccurate data)	34 (59.65%) <b>1</b>	10 (37.04%) <b>2</b>	18 (51.43%)
BUSINESS CASE - Unclear business case or return on investment (ROI)	13 (22.81%) <b>5</b>	8 (44.44%) <b>3</b>	19 (54.29%) <b>4</b>
DATA - Data access and integration challenges (linked systems)	25 (43.86%)	9 (29.63%)	9 (25.71%)
SKILLS - Lack of internal AI expertise and skills	19 (33.33%)	5 (18.52%)	6 (17.14%)
RISK - Concerns about data security and IP protection	14 (24.56%)	5 (18.52%)	7 (20.00%)
READINESS - Don't know where to start or which use cases to pursue	9 (15.79%)	7 (25.93%)	8 (22.86%)
SKILLS - Change management and training requirements	5 (8.77%)	6 (22.22%)	4 (11.43%)
TECHNICAL - Lack of appropriate AI capabilities from software providers	6 (10.53%)	4 (14.81%)	3 (8.57%)
BUSINESS CASE - Limited budget for AI initiatives	5 (8.77%)	2 (7.41%)	5 (14.29%)
READINESS - Waiting for AI technology to mature	8 (14.04%)	1 (3.70%)	3 (8.57%)
RISK - Difficulty validating AI outputs and ensuring reliability	3 (5.26%)	6 (22.22%)	3 (8.57%)
CULTURE - Cultural resistance to AI adoption	5 (8.77%)	4 (14.81%)	2 (5.71%)
TECHNICAL - Legacy systems and technical debt	8 (14.04%)	1 (3.70%)	2 (5.71%)
TECHNICAL - Complexity of implementation and integration	7 (12.28%)	0 (0.00%)	3 (8.57%)
BUSINESS CASE - Lack of executive sponsorship or support	2 (3.51%)	2 (7.41%)	4 (11.43%)
TECHNICAL - Need for AI solutions that operate in air-gapped or disconnected environments	3 (5.26%)	2 (7.41%)	3 (8.57%)
STRATEGY - Other technology priorities take precedence	2 (3.51%)	3 (11.11%)	2 (5.71%)
RISK - Regulatory and compliance uncertainty	2 (3.51%)	0 (0.00%)	2 (5.71%)
STRATEGY - Satisfied with current processes and tools	1 (1.75%)	2 (7.41%)	2 (5.71%)
Other	1 (1.75%)	1 (3.70%)	

- IC's #1 challenge: data quality at **60%**<sup>1</sup>. SW estimates **37%**<sup>2</sup> – a **23-point** underestimate.
- Both providers rate 'unclear ROI' as the top adoption blocker (SW **44%**<sup>3</sup>, SI **54%**<sup>4</sup>) while IC reports only **23%**<sup>5</sup>.

### The Integration Blind Spot


**IC\_21/SW\_24/SI\_24: Selection Factors:** What factors most influence your organization's selection of AI-augmented solutions for product development? (select top 3)

	Industrial	Software	Services
VALUE - Proven return on investment (ROI) and business value	27 (49.09%)	14 (52.85%)	16 (53.33%)
INTEGRATION - Integration with existing systems (PLM, CAD, CAE, ERP, etc.)	34 (61.82%) <b>1</b>	12 (46.15%) <b>2</b>	9 (30.00%) <b>3</b>
READINESS - Production-ready AI capabilities (not air-gapped or disconnected environments)	24 (43.64%)	9 (34.22%)	12 (40.00%)
TRUST - Data security and compliance features	22 (40.00%)	11 (42.31%)	9 (30.00%)
USABILITY - Ease of use and user adoption	18 (32.73%)	9 (34.62%)	6 (20.00%)
VALUE - Pricing and total cost of ownership	10 (18.18%)	5 (19.23%)	8 (26.67%)
READINESS - Software provider product roadmap and continuous improvement	4 (7.27%)	2 (7.69%)	6 (20.00%)
READINESS - Software provider reputation and market leadership	2 (3.64%) <b>4</b>	5 (19.23%) <b>3</b>	4 (13.33%)
SUPPORT - Success stories from similar companies	5 (9.09%)	2 (7.69%)	4 (13.33%)
TRUST - Transparent and explainable AI decision-making	4 (7.27%)	4 (15.38%)	3 (10.00%)
INTEGRATION - Flexibility and customization/deployment options	3 (5.45%)	1 (3.85%)	4 (13.33%)
SUPPORT - Implementation and support quality	4 (7.27%)	0 (0.00%)	3 (10.00%)
SUPPORT - Industry-specific AI capabilities	2 (3.64%)	2 (7.69%)	2 (6.67%)
TRUST - Commitment to responsible AI practices	1 (1.82%)	2 (7.69%)	3 (10.00%)
USABILITY - Training and change management support	5 (9.09%)	0 (0.00%)	0 (0.00%)
Other			1 (3.33%)

- IC: integration #1 at **62%**<sup>1</sup>. SW underestimates at **46%**<sup>2</sup> (-16 pts).
- SI underestimates at **30%**<sup>3</sup> (-32 pts) – larger than SW despite daily operational proximity to integration complexity.
- Provider reputation: IC **4%**<sup>4</sup>, SW estimates **19%**<sup>5</sup>.

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### Three Concerns Providers are Misreading

**IC\_26/SW\_25/SI\_22: Provider Concerns: What concerns does your organization have about AI solution providers? (select top 3)**

	Industrial	Software	Services
SECURITY - Data security and IP protection	24 (43.64%) <sup>4</sup>	17 (65.38%) <sup>2</sup>	22 (62.86%) <sup>3</sup>
MATURITY - Software provider over-promising and under-delivering	31 (56.36%) <sup>1</sup>	13 (50.00%)	16 (45.71%)
BUSINESS - Insufficient evidence of ROI	19 (34.55%)	8 (30.77%)	18 (51.43%)
MATURITY - Unproven capabilities or immature technology	16 (29.09%)	13 (50.00%)	12 (34.29%)
EXPERTISE - Lack of domain expertise in product development	21 (38.18%)	6 (23.08%)	9 (25.71%)
TECHNICAL - Limited integration with existing systems	15 (27.27%) <sup>5</sup>	4 (15.38%)	4 (11.43%)
BUSINESS - High costs and unclear pricing	10 (18.18%)	4 (15.38%)	7 (20.00%)
TECHNICAL - Lack of transparency in AI operations	9 (16.36%)	5 (19.23%)	6 (17.14%)
SECURITY - Compliance and regulatory gaps	5 (9.09%)	3 (11.54%)	4 (11.43%)
TECHNICAL - Software provider lock-in and limited flexibility	6 (10.91%)	3 (11.54%)	2 (5.71%)
BUSINESS - Software provider stability and long-term viability	5 (9.09%)	2 (7.69%)	3 (8.57%)
SUPPORT - Inadequate software provider implementation support	4 (7.27%)	0 (0.00%)	2 (5.71%)

- IC's #1 concern: over-promising and under-delivering at **56%**<sup>1</sup>.
- Both providers overestimate security/IP concerns (SW **65%**<sup>2</sup>, SI **63%**<sup>3</sup> vs. IC **44%**<sup>4</sup>).
- Integration concern (IC **27%**<sup>5</sup>) underestimated by both – completing the three-question integration blind spot



### The Innovation Disconnect

# 28%

Of industrial customers report it as a **realized** benefit

# 0%

Of software providers expect customers to prioritize design innovation over the next 2-3 years

# 36%

Of software providers report it too – 8th overall

# 6%

Of service providers expect the same

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### The Prioritization Gap

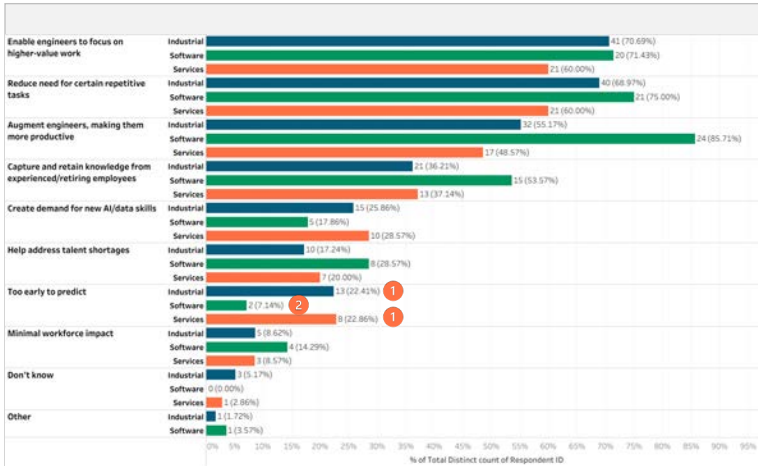
IC\_16/SW\_18/SI\_15: Expected Benefits: Which benefits from AI in product development does your organization expect to prioritize over the next 2-3 years? (select top 3)

	Industrial	Software	Services
SPEED - Reduced design and development cycle time	53.45% <sup>1</sup>	50.00%	57.14%
EFFICIENCY - Reduced manual or repetitive tasks	51.72% <sup>2</sup>	46.43%	45.71%
SPEED - Faster access to information, designs, or knowledge	36.21%	50.00%	34.29%
COST - Reduced development costs (labor, materials, prototyping, etc.)	25.86% <sup>3</sup>	46.43% <sup>6</sup>	34.29%
QUALITY - Improved design quality or reduced defects	25.86%	10.71%	20.00%
COST - Reduced rework and error correction costs	8.62%	7.14%	28.57%
PERFORMANCE - More optimized designs (performance, weight, efficiency)	18.97%	10.71%	8.57%
INTEGRATION - Simplified navigation across multiple software provider systems and applications	12.07%	10.71%	11.43%
COMPLIANCE - Improved compliance with standards or regulations	5.17%	25.00%	5.71%
EFFICIENCY - Improved collaboration and workflow efficiency	8.62%	7.14%	14.29%
INNOVATION - Increased design innovation or exploration of alternatives	17.24% <sup>3</sup>	0.00% <sup>4</sup>	5.71%
WORKFORCE - Improved knowledge capture and retention	6.90%	10.71%	8.57%
RISK - Reduced risk (design errors, regulatory issues, delays)	5.17%	7.14%	11.43%
No specific expectations yet	10.34%	0.00%	5.71%
QUALITY - Improved manufacturability or production readiness	8.62%	3.57%	2.86%
WORKFORCE - Addressing talent shortages or skill gaps	1.72%	14.29%	5.71%
Other	3.45%		

- IC's top expected benefits: reduced cycle time (**53%<sup>1</sup>**), reduced manual tasks (**52%<sup>2</sup>**).
- Design innovation: IC **17%<sup>3</sup>**, SW predicts **0%<sup>4</sup>**.
- Cost reduction: IC **26%<sup>5</sup>**, SW estimates **46%<sup>6</sup>** – nearly double.

### The Workforce Uncertainty Gap

IC\_17/SW\_19/SI\_16: Workforce Impact: How does your organization expect AI to impact your product development workforce? (select all that apply)



- IC and SI both at **22-23%<sup>1</sup>** “too early to predict” on workforce impact.
- SW: **7%<sup>2</sup>**. The augmentation narrative has three-way consensus.
- The confidence gap is on specific productivity outcome claims.

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### The Delivery Bottleneck

# 47%

Of service providers say the factor that would most improve their ability to deliver successful AI implementations is

***More realistic client expectations about AI***

Ahead of better methodologies (40%), improved client readiness (37%), more mature provider capabilities (30%), enhanced internal expertise (13%)

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### Where to Focus

What the combined data implies

- 01 STRONG CALIBRATION**  
**Field experience is producing accurate customer readings**  
Customer maturity conditions and core application area priorities are well-understood—SW providers are reading the room correctly here.
- 02 RECALIBRATE**  
**Four critical gaps are distorting provider strategy**  
Validation confidence, data quality as the real primary barrier, integration as #1 selection driver, and innovation priority moving forward. **6x** validation gap
- 03 STRUCTURAL OPPORTUNITY**  
**The usage gap is temporal and compressible**  
Customers are not stuck—they are moving. Invest in priority workflows and onboarding, not more features.
- 04 THE NARRATIVE GAP**  
**Innovation value is recognized but not projected forward**  
Customers and providers both report innovation as a realized benefit. Yet 0% of providers expect customers to prioritize it. The space for an innovation narrative is wide open.

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## Concluding Remarks

<p><b>01</b></p> <p><b>Providers Are All-In — Customers Are Not</b></p> <ul style="list-style-type: none"> <li>• <b>87%</b> of software providers rate AI as top or high investment priority.</li> <li>• <b>45%</b> of customers say 3+ years or never to standardize AI—a 2-year planning gap.</li> </ul>	<p><b>02</b></p> <p><b>AI Monetization Remains Unsolved</b></p> <ul style="list-style-type: none"> <li>• No dominant pricing model.</li> <li>• <b>49%</b> of customers cite ROI as top selection factor; <b>31%</b> of software providers cite demonstrating ROI as a top monetization challenge.</li> </ul>	<p><b>03</b></p> <p><b>Governance Is the Provider Blind Spot</b></p> <ul style="list-style-type: none"> <li>• <b>0%</b> of software providers cite governance as a top challenge in developing and delivering AI capabilities.</li> <li>• Meanwhile, <b>68%</b> of customers cite IP protection as #1 governance concern.</li> </ul>	<p><b>04</b></p> <p><b>Integration Is #1 for Customers</b></p> <ul style="list-style-type: none"> <li>• Integration is a top-3 selection factor for <b>62%</b> of customers, making it #1 overall.</li> <li>• Only <b>46%</b> of software providers (-16 pts) and <b>30%</b> of service providers (-32 pts) agree.</li> </ul>	<p><b>05</b></p> <p><b>The Innovation Disconnect</b></p> <ul style="list-style-type: none"> <li>• <b>28%</b> of customers and <b>36%</b> of software providers report innovation as a realized benefit of AI</li> <li>• However, <b>0%</b> of software providers expect customers will prioritize AI for innovation over the next 2-3 years.</li> </ul>
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## Questions & Answers

What's on your mind?

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