

# News from the Field

2025 Market & Industry Forum—9 April 2026

**CIMdata**

**News from the Field**  
**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**

**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.

**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

**Leading strategic management consulting firm**

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## Key Takeaways



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- Financial investors are concerned about AI potential impact on license revenues
- There continues to be a significant gap in technology knowledge & specific implementation enhancement & adoption
- PLM expansion projects commonplace in mature regions & industries
- Emerging economies getting into PLM as their markets mature
- AI's disruptive potential have many looking & asking questions
- Mergers, as well as product complexity & compliance driving PLM
- Most PLM solution provider ecosystems are failing to fully deliver

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## Discussion Topics

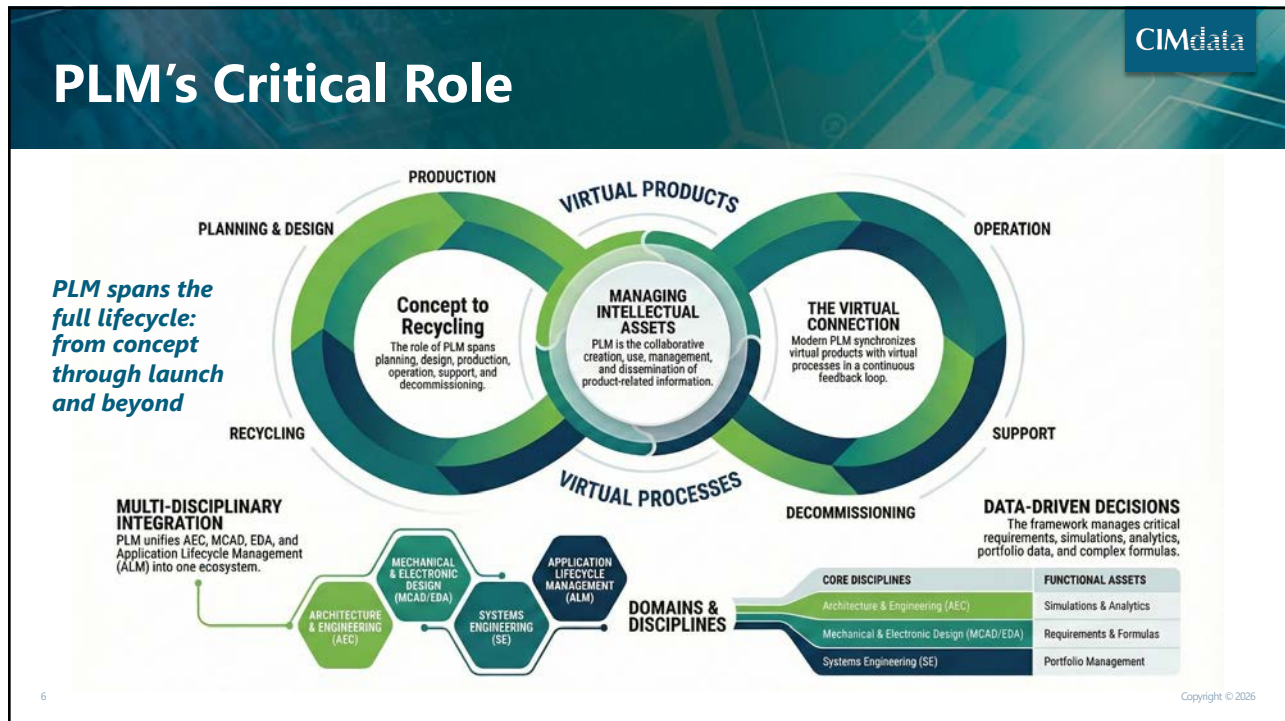
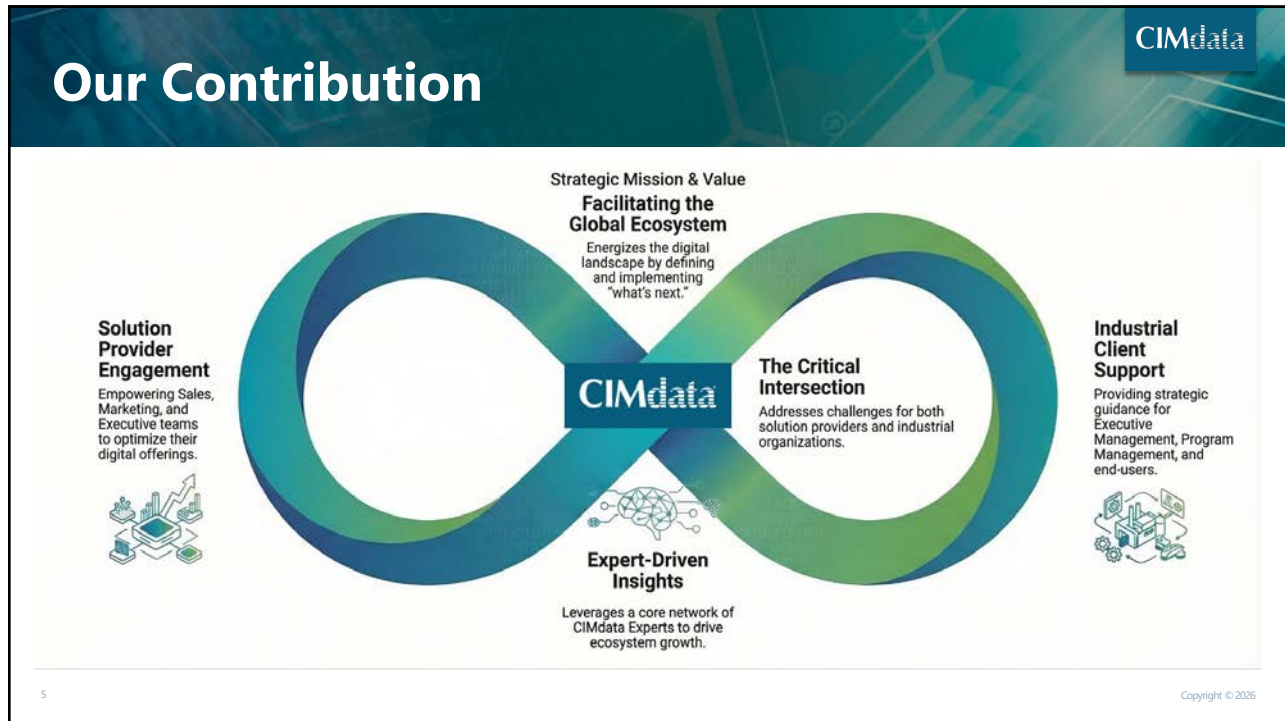
- CIMdata's Field Involvement Defined
- What We are Hearing from the Investment Community
- What's Working/What's Not Working
- Field Insight by Region
- Key Drivers by Industry
- Concluding Remarks

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## Transformation Methodology




Services for industrial organizations to enable digitalization of their product lifecycles

**Supporting growth & evolution of enterprises across a wide range of industries in their pursuit of digitalization**


**Six Pillars of Support**

- Long-term Lifecycle Optimization
- Active Digitalization Deployment




- Technical Requirement Scoping
- Feasibility & Value Assessment

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## Invest Methodology




Optimizing investments in the evolving global digital ecosystem

**Supporting growth & evolution of enterprises across a wide range of industries in their pursuit of digitalization**

**Six Pillars of Support**

- MARKET AND PRODUCT ASSESSMENTS
- MARKET RESEARCH
- MARKET EDUCATION
- MARKET ASSESSMENT
- EXPERT NETWORK
- MARKET RESEARCH



- COMMUNITY AND NETWORK ACCESS
- RESEARCH AND EDUCATION

**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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## Global Knowledge & Relationships

 *Diverse, deep experience across industry verticals...delivered on six continents!*

Clients & offices in the Americas, EMEA, and Asia-Pacific



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## What We are Hearing...

 *from the Investment Community*

- How is/will AI impact PLM solution sales?
- Will the number of seats (i.e., license revenue) suffer?
- Which solution provider is leading the AI race?
- Will the main PLM solution providers be completing against the data platform providers?
- Which solution providers are best set up for the AI transition?
- Will PLM solutions be impacted to the same level as other enterprise solutions (e.g., ERP & CRM)?

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## What We are Hearing...



*from the Industrial Community*

- What is AI?
- Where should I leverage AI?
- How do I control AI usage?
- What questions should I ask my solution providers?
- How much of AI is real and useful?
- Will AI require me to rearchitect my PLM environment?
- How do I incorporate our use of AI (e.g., from Google, OpenAI, MS) into our current PLM environment?

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## What's Working



*Comments based on interactions with industrial companies around the world*

- Expanded emphasis on AI has caught peoples' attention
- Organizations that have training/education programs or have taken advantage of 3<sup>rd</sup>-party programs (e.g., CIMdata's) perform better
- The overall digital transformation messaging continues to drive investment in various aspects of product lifecycle enablement
- Organizations that have and/or are executing organizational change management programs are more like to move faster & buy more
- Digital engineering enablement appears to be gaining momentum in multiple industries

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## What's Not Working


 *Comments based on interactions with many of your field personnel (1 of 3)*

- Still not getting the right experts involved
  - E.g., you aren't going to show well if you don't have the right experts involved at the right time—mutual investment might be required
- Not adjusting demonstrations to fit the client's issues and/or industry
  - E.g., not enough time spent or not listening—hard to tell
- Trying to control the client's evaluation process
  - E.g., we always stress fairness and thoroughness—it is an education process
- Selling the A team but giving them the B team isn't working
  - E.g., it doesn't take too long for a smart client to see through this

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## What's Not Working


 *Comments based on interactions with many of your field personnel (2 of 3)*

- More leverage of previous evaluation responses required
  - E.g., In many cases it appears that past responses are not being built upon
- Often too focused on technology and not enough focus on adoption
  - E.g., while organizational change (OCM) is mentioned, limited OCM knowledge and/or limited PLM knowledge exists
- Still a disconnect between technical skills & business application knowledge
  - E.g., Solution can be demonstrated, but business value presentations are few and far between


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## What's Not Working

 Comments based on interactions with many of your field personnel (3 of 3)

- Value Selling has become paramount for technology providers
  - Value Selling requires a different sales engagement process than product selling, which isn't being done consistently
- Partner programs aren't delivering to their full potential
  - Strategic Partnerships with C, SIs, and CSIs take time—don't expect tangible results before 3 years...strategic intent is required
- Many industrial companies need to understand your vision and how your solutions enable it
  - The breadth & depth of many solution suites is beyond comprehension

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## Field Insight by Region

 Not all regions are the same—maturity level and needs vary (1 of 2)

- Asia & the Pacific
  - China head-wind for non-China based solution providers
  - Japan & Korea still offer significant opportunities well beyond PDM
  - India becoming the new China—growing in multiple dimensions
  - Southeast Asia production growth potentially leading to engineering growth
- Europe
  - Central Europe, UK & Scandinavia still strong with additional opportunities
  - Eastern Europe emerging as engineering & production capabilities grow
  - Sustainability an important topic throughout
  - M&A continues to drive major CAx & PDM harmonization programs

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### Field Insight by Region



*Not all regions are the same—maturity level and needs vary (2 of 2)*

- Middle East & Central Asia
  - Most economies singularly focused—a clear need to diversify
  - Many economies weak & not much engineering, let alone production
- Americas
  - U.S. market continues to be a major growth driver, but economic uncertainty exists
  - M&A continues to drive major CAx & PDM harmonization programs
  - Most have PDM, and even CAx data mgt.—PLM opportunities are significant
  - Smart & connected, and increased complexity driving new investments
  - South America still a question mark

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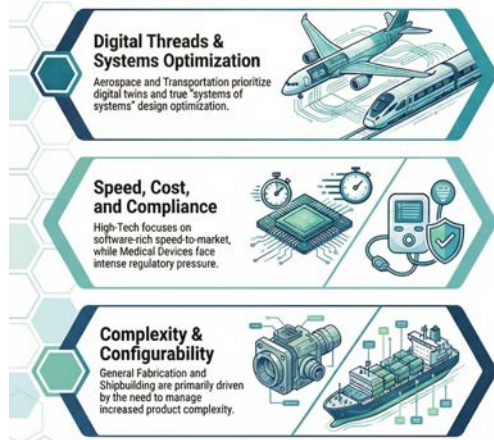
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### Key Driver By Industry—Discrete

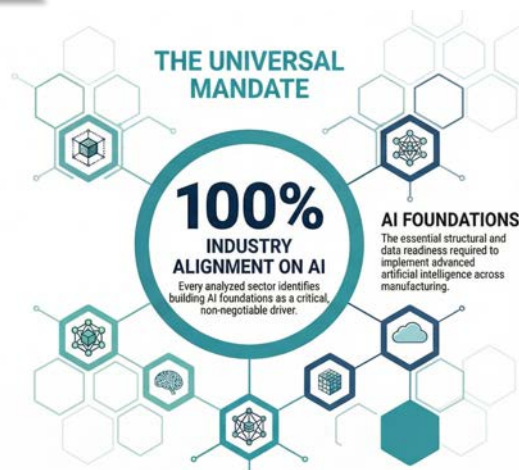


*Industry-specific needs vs. the universal AI mandate—no one wants to be left behind*

#### INDUSTRY-SPECIFIC STRATEGIC DRIVERS



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### Key Driver By Industry—Process

*Unique operational challenges and key drivers across major industrial sectors*

**Consumer Goods & Life Sciences**  
**CPG: Speed to Market & AI Foundations**  
 Focus on managing complexity and regulatory pressure while establishing core AI foundations.

**Primary Process Driver:**  
 Consumer Packaged Goods: Speed to market  
 Pharmaceutical: Speed to market vs. pricing pressure

**Food & Pharma: Regulatory Strain**  
 Both sectors face rising complexity and intense pricing or regulatory pressures.

**Energy & Sustainability**

**Oil & Gas: The Green Transition**  
 Industry leaders are prioritizing greener operations and business diversification.

**Primary Process Driver:**  
 Oil & Gas: Environmental diversification

**Varying Maturity Levels**  
 Not all industries are the same; operational needs depend on specific sector maturity.

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### Key Driver By Industry—Other

*Navigating this unique sector's needs*

**COMMERCIAL & FINANCIAL DRIVERS**

**RETAIL BRAND GROWTH**  
 Focus on the development and strategic management of in-house brands.

**BANKING & INSURANCE COMPLIANCE**  
 Both sectors prioritize increased product configurability alongside rigorous regulatory compliance.

**RESEARCH DATA MANAGEMENT**  
 Research institutes face increasing operational complexity and evolving data management requirements.

**ACADEMIC & RESEARCH COMPLEXITY**

**ACADEMIC CONFIGURATION**  
 Academia focuses on balancing highly configurable systems with strict compliance standards.

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## Concluding Remarks



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- Sales engagements vary widely throughout the industry  
...professionalism varies widely, AI has the potential of significant disruption
- There is a significant gap in technology knowledge & specific implementation enhancement & adoption...a bridge is required
- Mergers, as well as product complexity & compliance are driving many PLM initiatives
- Most PLM solution provider ecosystems failing to fully deliver...you must build & cultivate your partner ecosystem

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## Questions & Answers



What's on your mind?



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competitive advantage in global markets

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