



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

## PLM Market & Industry Forum

### A CIMdata Leadership Event

**April 2023**

*Peter Bilello, President & CEO, [p.bilello@CIMdata.com](mailto:p.bilello@CIMdata.com)  
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**#plm4um**

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Defining What Comes Next in Digital Transformation

*Strategic management consulting for competitive advantage in global markets*

**The leading independent authority on PLM and its digital transformation. We provide research, education, and strategic consulting to clients around the world.**

**OUR MISSION:**  
**Maximizing clients' ability to design, acquire, deliver, and support innovative products and services.**

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# Key Takeaways



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

- 2023 – CIMdata's 40<sup>th</sup> year of defining, tracking & working in the global PLM market
- The global PLM economy is growing and continues to add value
- Multiple disconnects still exist, e.g., prioritization of digital initiatives, and managements narrow understanding of lifecycle management
- To be successful, companies need to transform people, processes and technologies—there are at least 12 critical elements
- The digital thread is really a digital web—key to true E2E traceability
- Data governance and sustainability are lifecycle issues

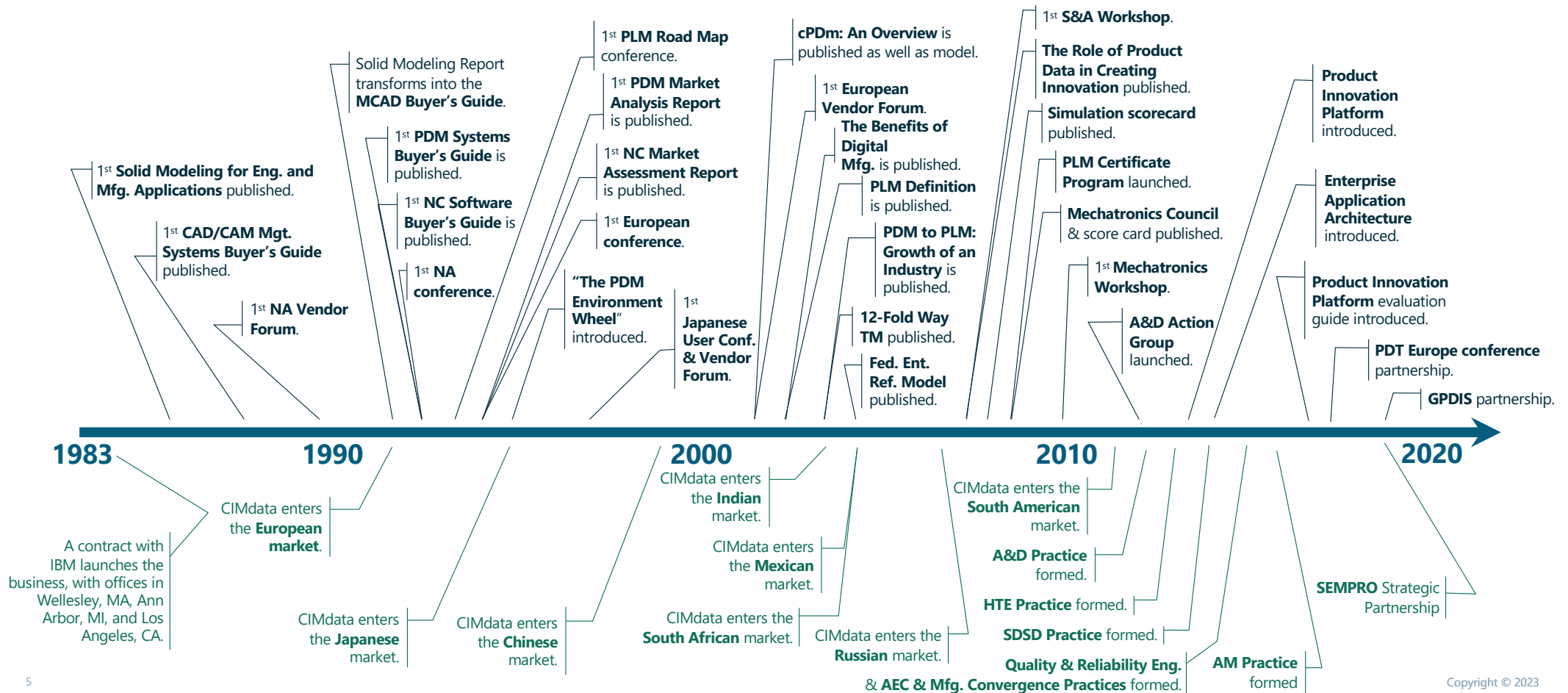
# Agenda

- What's New from CIMdata
- 2022: The Year in Review
- 2023: Today's Trends & Challenges
- Looking Towards the Future
- The Digital Thread: Powering Business Transformation
- Concluding Remarks



# CIMdata: Celebrating Our 40<sup>th</sup> Year

CIMdata

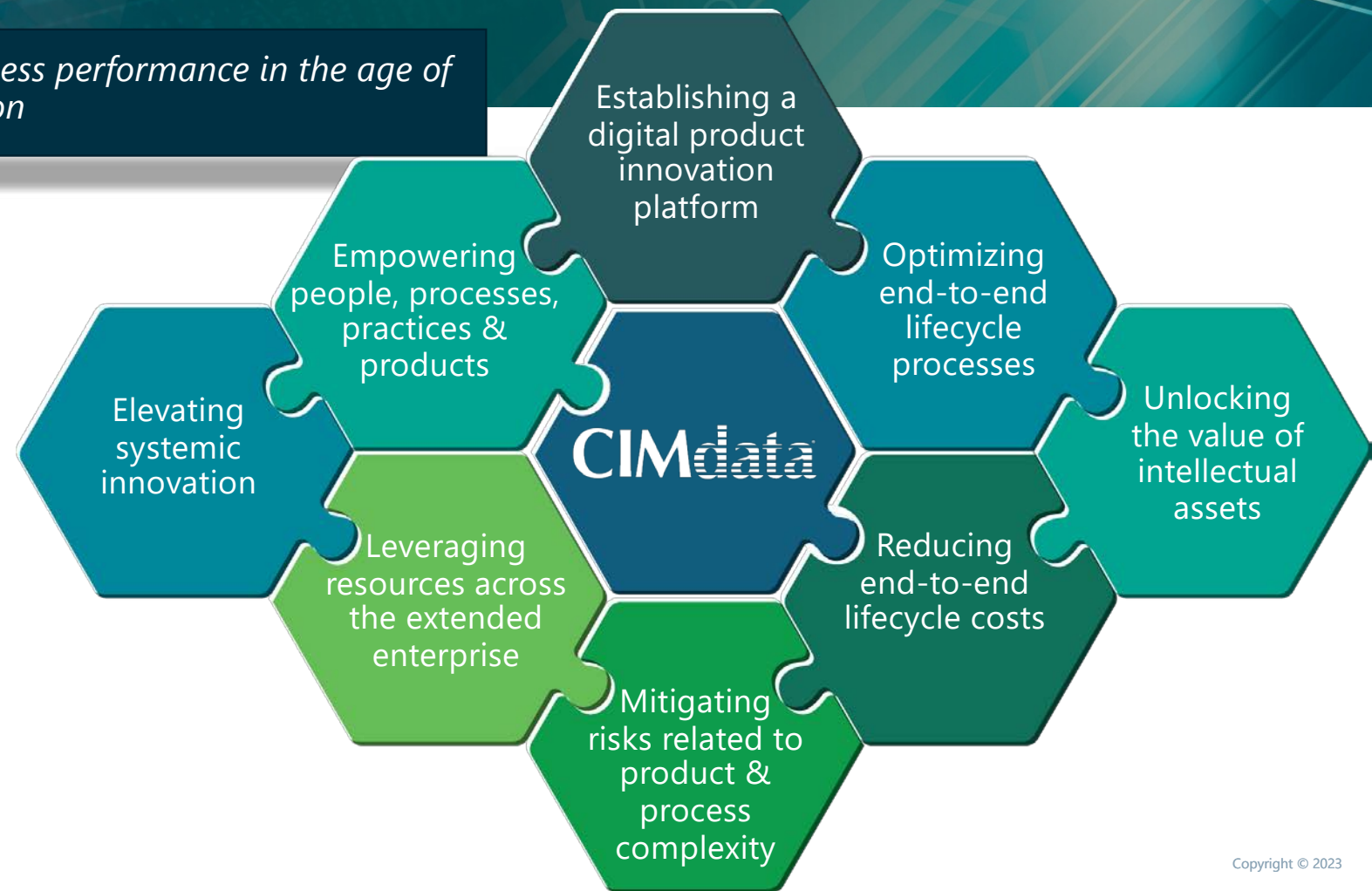


# What We Do



*We help boost business performance in the age of digital transformation*

Expertise that improves our clients' ability to design & deliver sustainable "right to market" products & services



# Our Approach



*Digitally transforming product lifecycles with unbiased research & actionable insight*

- Deliver independent strategic advice & counsel
- Support the end-to-end product lifecycle
- Apply a methodology that is solution-independent, modular & adaptable
- Provide expert & actionable insight informed by extensive market & technology research





# Our Team



*Working closely with clients from industry & technology gives us a unique perspective*

- Extensive team of senior consulting professionals
- Experienced in multiple industries
- Extensive relationships with industrial clients and solution providers

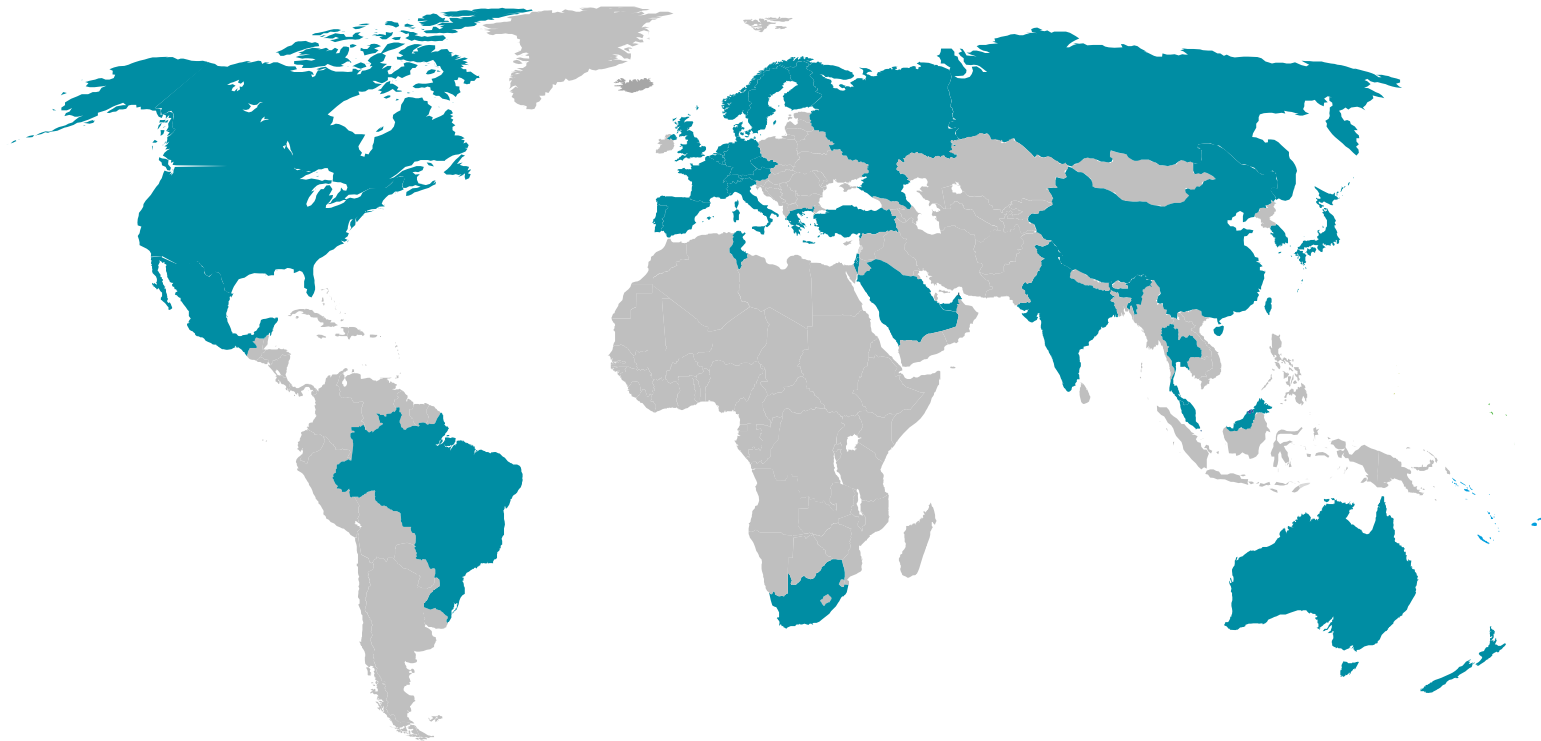


# Global Knowledge & Relationships



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

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



# Our Contribution



*We facilitate and energize the global digital ecosystem*

CIMdata sits at the critical intersection of the digital ecosystem, helping define & implement what's next



We address challenges & identify opportunities for both solution providers and industrial organizations



# Our Services



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



- Research & analysis
- Technology evaluations
- Market-specific insights
- Industry news & trends

- Industry conferences
- Seminars & webinars
- Certificate programs
- Best practices

- Strategic guidance
- Aligning solutions with needs
- Program management advisement
- Market positioning

# Success Methodology

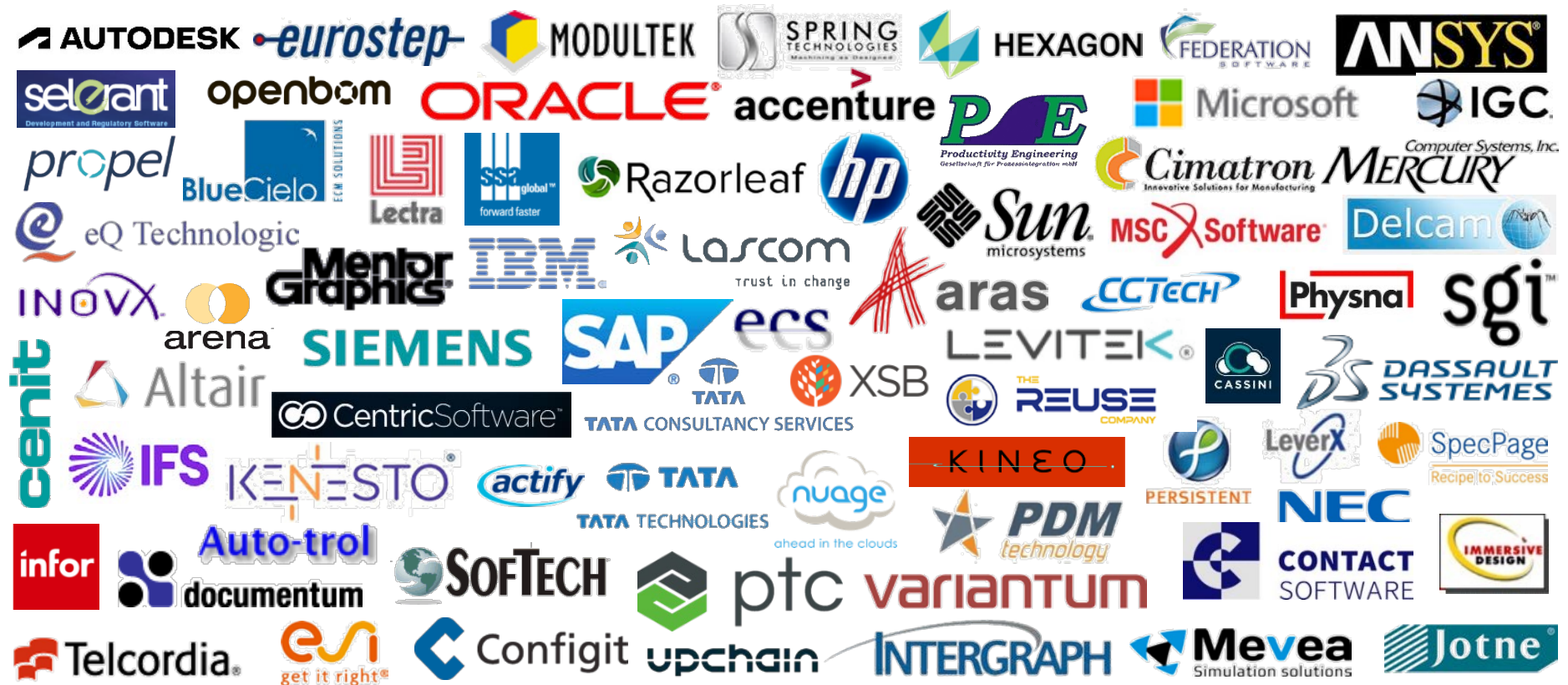


*Services for solution providers to support their drive toward market success*

Driving growth & competitive advantage in a complex, dynamic market



# Select Success Clients





# Invest Methodology



*Optimizing investments in the evolving global digital ecosystem*

Informed analysis of global PLM markets for industry analysts, private equity firms, and other financial service organizations



# Select Financial Industry Clients



# 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





# Select Transformation Clients

## Aero & Defense



## Auto/Transportation



## Fab & Assembly



## High-Tech



# Select Transformation Clients

## CPG/F&B/Process



## Medical/Pharma



## Emerging Industries



## Other





# Consulting Practice Areas



*Guidance & insight focused on multiple facets of digital transformation*

- Additive Manufacturing
- AEC & Manufacturing Convergence
- Aerospace & Defense
- Data Governance
- Digital Skills Transformation
- Collaborative Innovation & Social Product Development
- Manufacturing Systems Engineering
- Simulation-Driven Systems Development
- Sustainability & Green Energy





# Expansion of CIMdata's Simulation Practice



Sandeepak Natu joins CIMdata's Simulation-Driven Systems Development team

Monday, January 16, 2023

## CIMdata Announces Expansion of Simulation Practice Team

*Developing hybrid digital twins with strategic insights and implementation consulting.*



Ann Arbor, Michigan, USA 16 January 2023—CIMdata, Inc., the leading global PLM strategic management consulting and research firm, announces the expansion of its Simulation-driven Systems Development (SDSD) practice team, with the addition of Sandeepak Natu as an Executive Consultant.

With industry experience of more than 25 years, Sandeepak has a strong background in multi-physics-based modeling and simulation technologies, including the development and application of hybrid digital twins. Sandeepak started his career with Fluent India (now part of ANSYS Inc.) and has been associated with several engineering consultancy and simulation software organizations. He has worked with various industrial organizations helping them adopt simulation technologies and has deep application expertise in the automotive, aerospace, chemicals, pharmaceuticals, food, consumer products, and healthcare sectors. More recently, he has been involved in multiple technology and management consulting roles encompassing digitalization, simulation, sustainability, and business management, including a key role in helping a global vaccine manufacturer scale up its production facilities at the peak of the COVID-19 pandemic.

# Sustainability & Green Energy Practice



Mark Reisig joins CIMdata's as an Executive Consultant & Practice Director

Monday, July 18, 2022

## PLM Industry Executive Mark Reisig joins CIMdata as Executive Consultant and Practice Manager

*The primary focus will be on developing and delivering new services to meet the expanding needs of CIMdata's industrial clients.*



Ann Arbor, Michigan, USA, 18 July 2022—CIMdata, Inc., the leading global Product Lifecycle Management (PLM) strategic management consulting and research firm, has hired Mark Reisig as an Executive Consultant and Practice Manager. Mark will focus on Green Energy enablement.

Peter Bilello, President & CEO of CIMdata, commented, "We're excited to have Mark join CIMdata. He has a deep understanding of PLM both from a solution provider and industrial user perspective. His experience has given him a comprehensive understanding of how industrial clients' needs continue to evolve. Mark's extensive experience will help CIMdata support its clients in meeting existing and new market challenges."

Mark joins CIMdata after an extensive career in PLM with GE, Federation, Oracle, Auto-trol Technology, Kraft-Heinz, Catalytic, Day & Zimmermann, and most recently, Aras, where he was the Vice President of Product Marketing.

# CIMdata Foresight



*Delivering actionable research to the global digital economy*

- Market Research
  - Global and regional market analysis reports
  - PLM benefits appraisal guide, pricing analysis, etc.
- CIMdata Communities
  - Industrial organizations and solution providers
- CAM Market Service
- Publications
  - Late-breaking news, commentaries, etc.
- Custom Research Projects



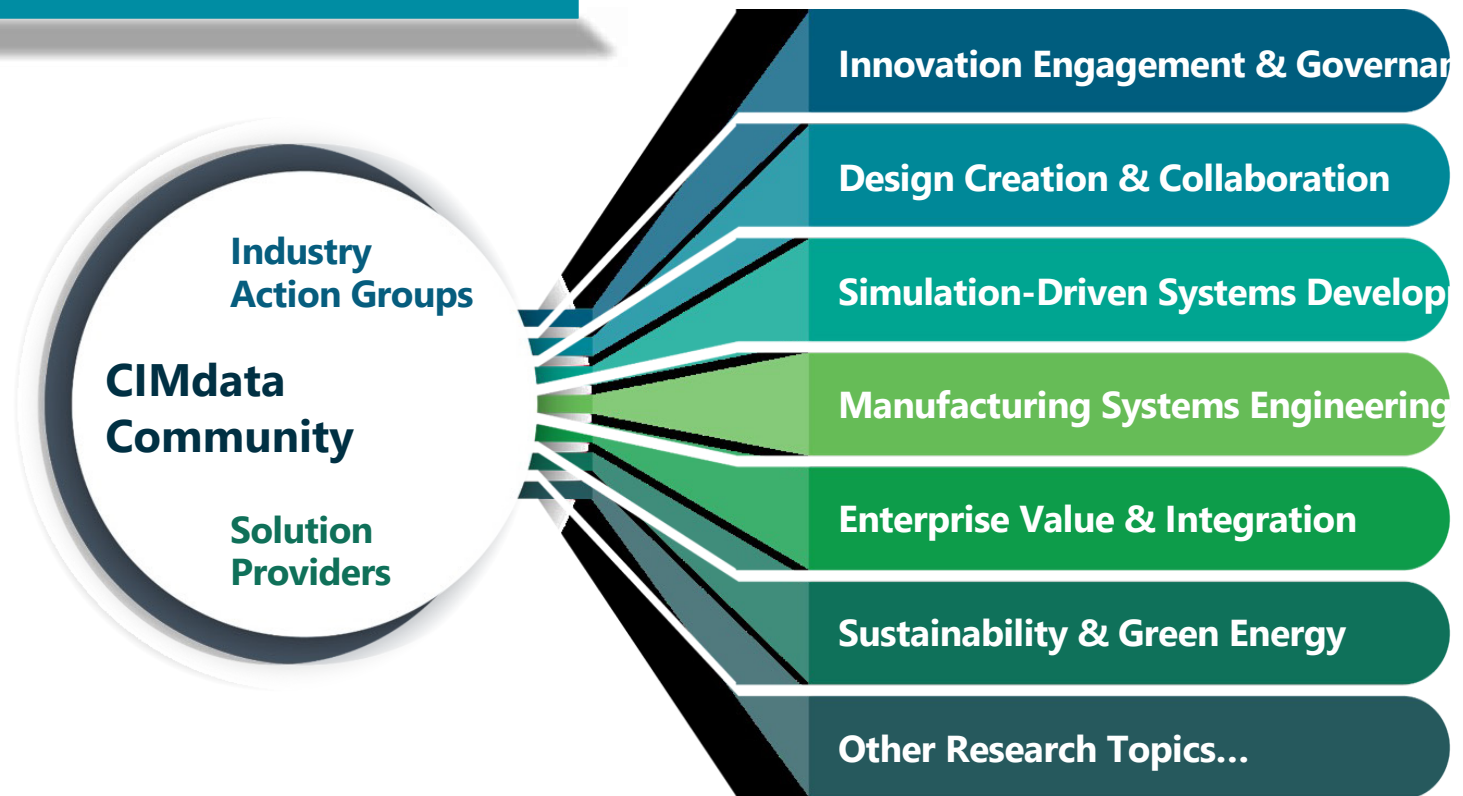


# Membership Services



*A rich set of community services  
and research areas*

Broad, deep  
portfolio of  
services and  
research topics



# Aerospace & Defense PLM Action Group

## Group Overview



Jim Roche  
A&D Practice Director



**AIRBUS**



**Gulfstream®**  
A GENERAL DYNAMICS COMPANY



**SAFRAN**

# Collaborative Research Program



*Study Digital Thread current state & future trends—more on this later*

**CIMdata** **AEROSPACE & DEFENSE PLM ACTION GROUP**

CIMdata / AD PAG Digital Thread Survey  
Answers marked with a \* are required.

1/6 16%

**CIMdata / AD PAG Digital Thread Survey**  
September 2022

The Digital Thread, in various incarnations, has been a core element of the product lifecycle management (PLM) vision for decades. The concept of automated linkage of multiple representations of a product, each tuned to the needs of various creators and consumers along the lifecycle, is very powerful. Until recently, tracing these linkages has been primarily a manual process, extracting product information from myriad heterogeneous systems and relating them in ad hoc reports. But now, with recent advances in commercial PLM solutions, the Digital Thread, with automated linkages and traceability, has become a practical possibility, even for industries with complex products, such as aerospace & defense.

In response, leaders in the A&D industry are starting to implement targeted digital thread solutions and envision expanding these solutions upstream and downstream throughout the product lifecycle. With the newness of this approach there is not much available in the way of lessons learned or actual value achieved. This lack of real data is a barrier to broader investment within industry. On the other hand, solution providers lack insight into current state and future investment drivers within industry that is crucial to their solution strategies and roadmaps.

The Aerospace & Defense PLM Action Group (AD PAG) is an association of aerospace & defense companies which functions as an advocacy group for this industrial community with the PLM software and service providers. Digital thread is a huge topic in the global aerospace and defense industry and the Group recently completed a study on the topic.

<https://www.cimdata.com/en/aerospace-and-defense/publications/digitalthread-digitalthread>

In this new research effort, CIMdata and the AD PAG are partnering with Aras, Eurostep, Jama Software, PTC, and Siemens Digital Industries Software, all solution providers committed to addressing the digital thread challenges of industrial companies. This research is intended to provide meaningful insight to both communities on industrial needs, status, and plans for their digital thread implementations. And this survey to gather your perspective is a key component of our research.

Completing the survey should take 30-40 minutes of your time. Only summary statistics and charts of your responses will be provided to our sponsors and published by the CIMdata team. Respondents can request a copy of the survey results at the conclusion of the survey.

In return for your participation, those fully completing and submitting the survey with a business email address will be entered into a drawing for one of the following incentives:

- \$100 Amazon gift card (10 offered)
- \$50 Amazon gift card (10 offered)

The drawing for the incentives will be randomized and made after the survey is closed.

Thanks for your participation and let's get started!

**Please read and answer all of the questions.**

CIMdata, Inc.  
Ann Arbor, MI USA  
<http://www.CIMdata.com/>



## Sponsors



## Objective

*The A&D PLM Action Group members and the PLM solution provider sponsors share a common objective for this research –*

*To gain understanding of needs and opportunities within industry that will inform Digital Thread solution strategy and roadmap*



# CIMdata Leadership



*Industry leading conferences, seminars, and educational programs (1 of 3)*

- Speakers at international conferences
  - PDT North America 2023 – May, Washington D.C. area
  - PDT EMEA 2023 – November, Paris, France
- PLM Market & Industry Forums for solution providers
  - North America 2023 – March 30 (in-person)
  - EMEA 2023 – April 4 (in-person)
  - India 2023 – April 10 & 11 (virtual live)
  - China 2023 – April 13 & 14 (virtual live)
  - Japan 2023 – April 17 & 18 (virtual live)



# CIMdata Leadership



Industry leading conferences, seminars, and educational programs (2 of 3)

- CIMdata Community Events
  - A&D PLM Action Group Workshops
  - Industry PLM Action Group Workshops
  - Others to be announced
- PLM Road Map™ 2023 Series
  - PLM Road Map™ NA 2023—3-4 May, Washington D.C. area
  - PLM Road Map™ EMEA 2023—15-16 November, Paris, France

***PLM Road Map, in its 30<sup>th</sup> year, continues to be a premier international PLM industry event in the rapidly transforming digital world***

# CIMdata Leadership



*Industry leading conferences, seminars, and educational programs (3 of 3)*

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





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# Defining PLM



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

## PLM is...

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

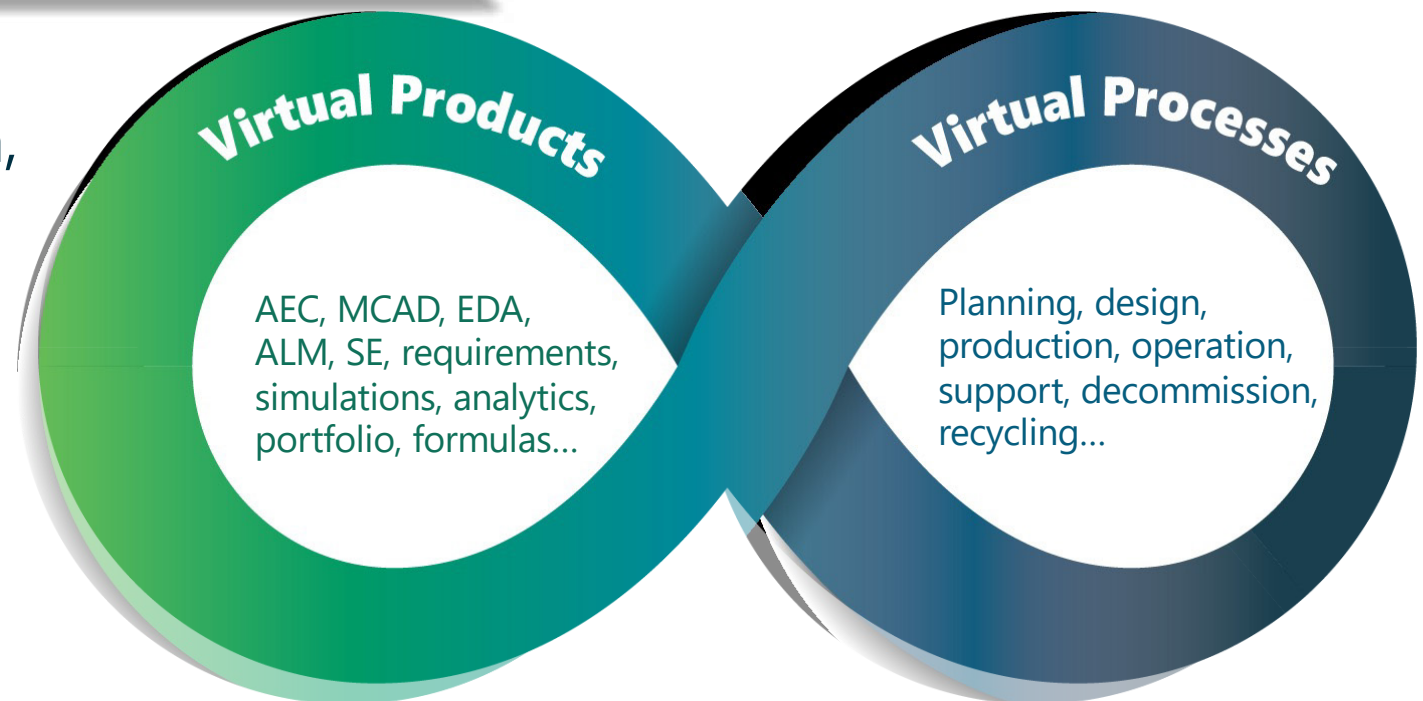


# PLM's Critical Role



*Spans the full lifecycle: from concept through launch and beyond*

PLM is the collaborative creation, use, management, and dissemination of product-related *intellectual assets*





# 2023 CIMdata PLM Status & Trends Survey



*Some key conclusions*

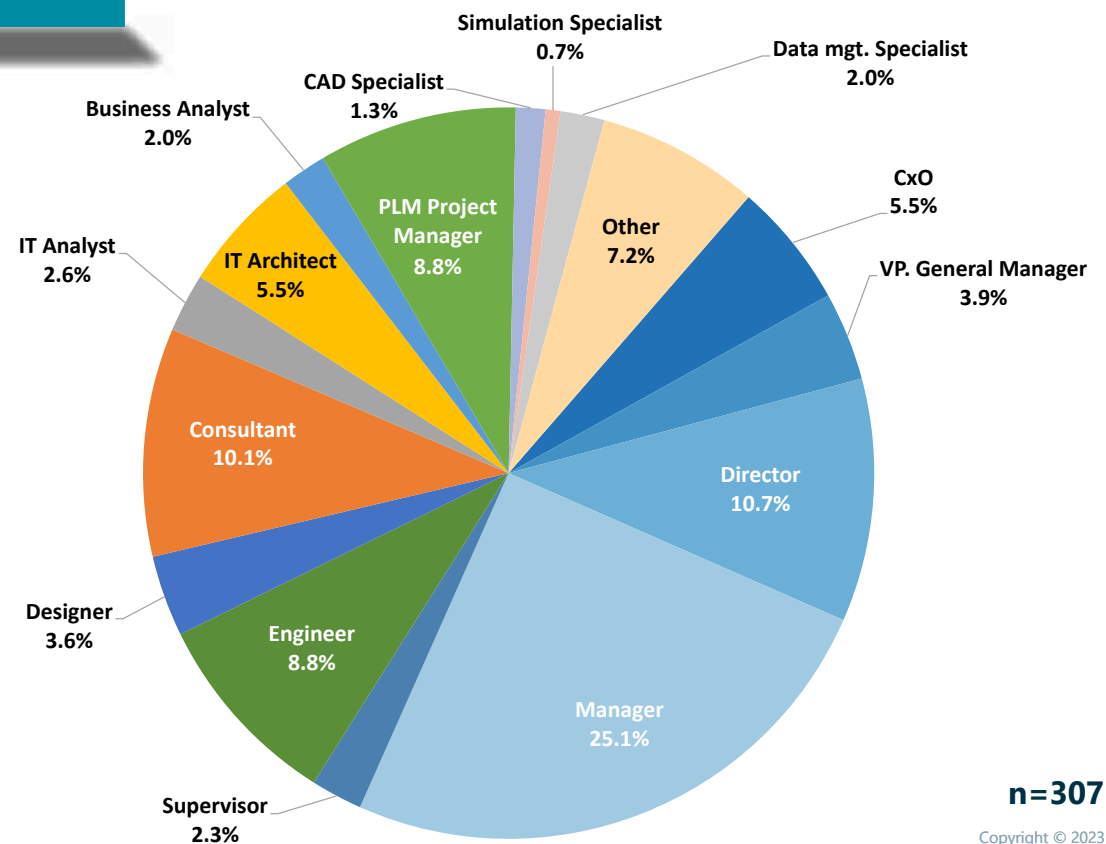
- CIMdata's PLM Status & Trends survey executed again (6<sup>th</sup> year)
- This year's respondents represent a wide & diverse community
- Most implementations still focus on "traditional" PDM aspects of PLM
- For the most part, companies continue to find PLM worth investing in
- There continues to be an emphasis on getting faster, better, cheaper
- Enterprise digital priorities & systems confusion still exists
- Management disconnect is believed to be widespread
- PLM appears to have continued its positive momentum

# Respondent Demographics



*What is your role/title?*

**CIMdata comment:** ~47.5% of the respondents hold a role of supervisor or higher in their organization, and another ~9% are PLM Project Managers. A good cross section of PLM influencers and users.



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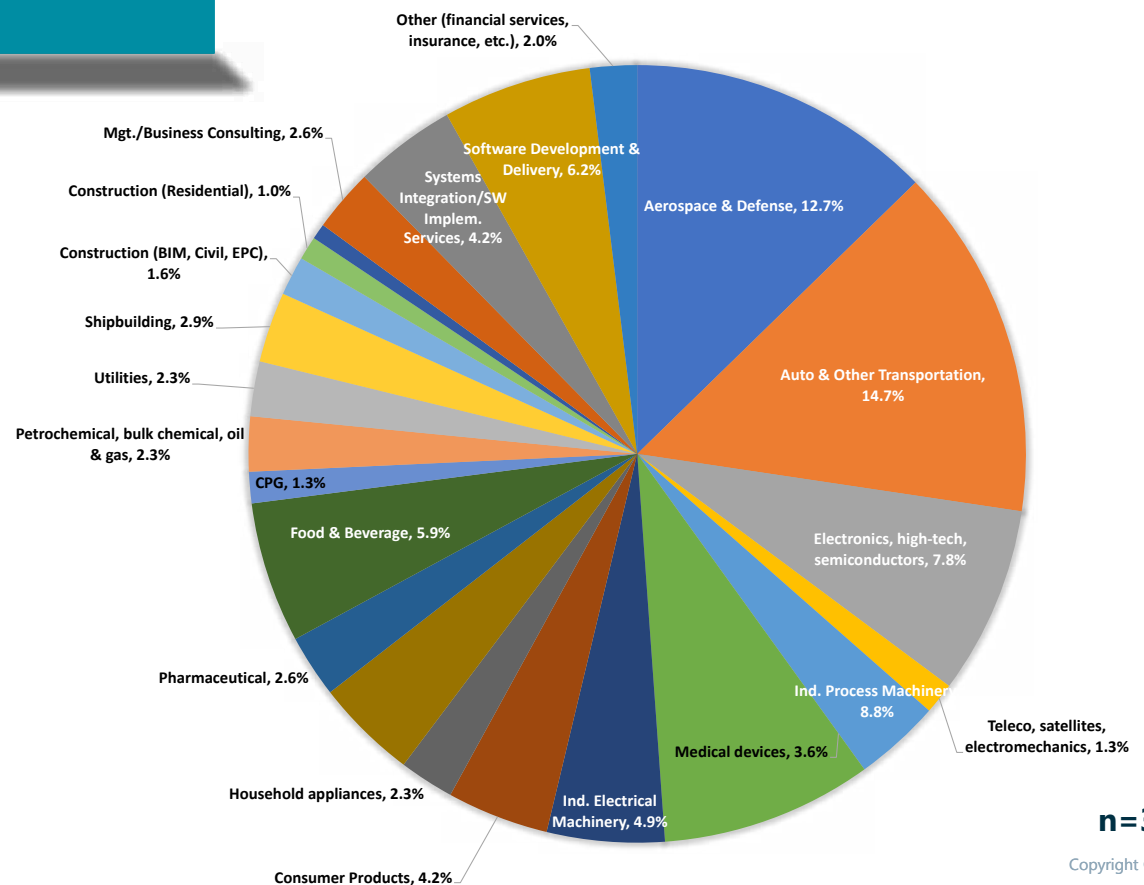
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# Respondent Demographics



*What is the primary industry your company serves?*

**CIMdata comment:** This industry spread approximately matches the overall spend on cPDm offerings, traditionally led by automotive, aerospace and defense, high-tech, industrial machinery, and medical device.



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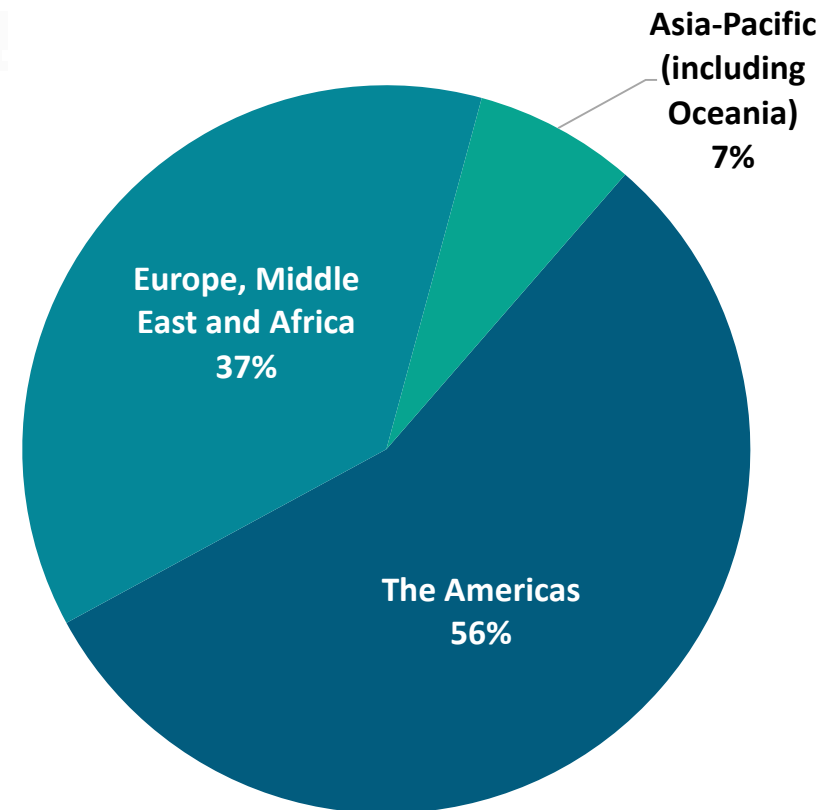
# Respondent Demographics



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

## **CIMdata comment:**

Respondents primarily from EMEA and the Americas, and a good representation from Asia-Pac this year. Global PLM spend is 40-40-20.



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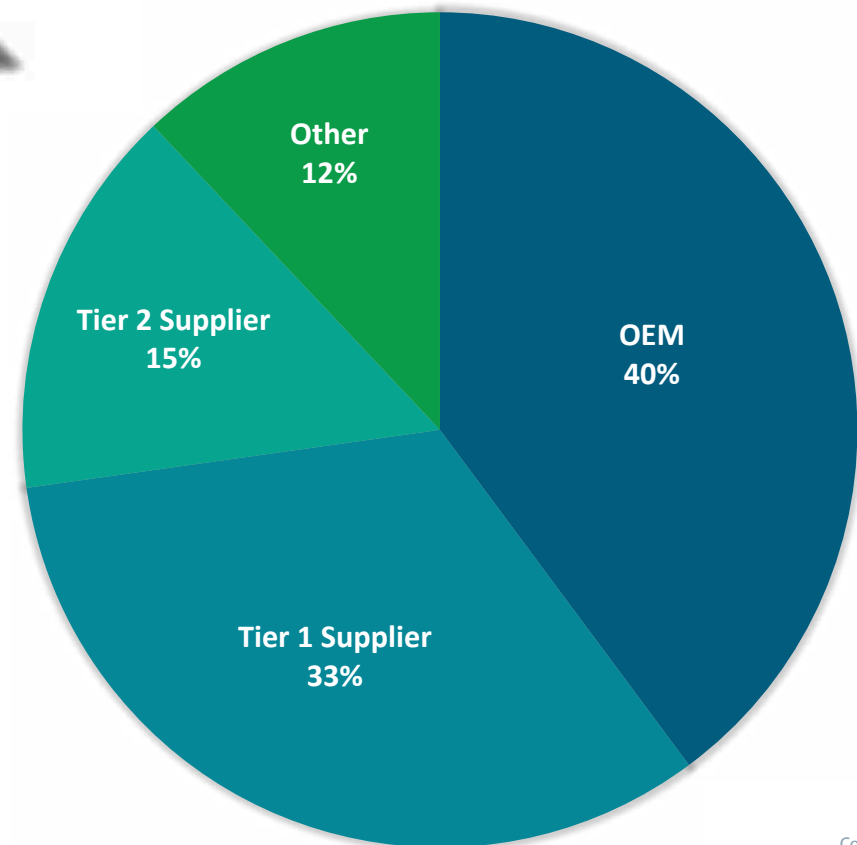
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# Response Demographics



*What is the primary position of your company in the ecosystem?*

**CIMdata comment:** Good spread among supply chain participants.



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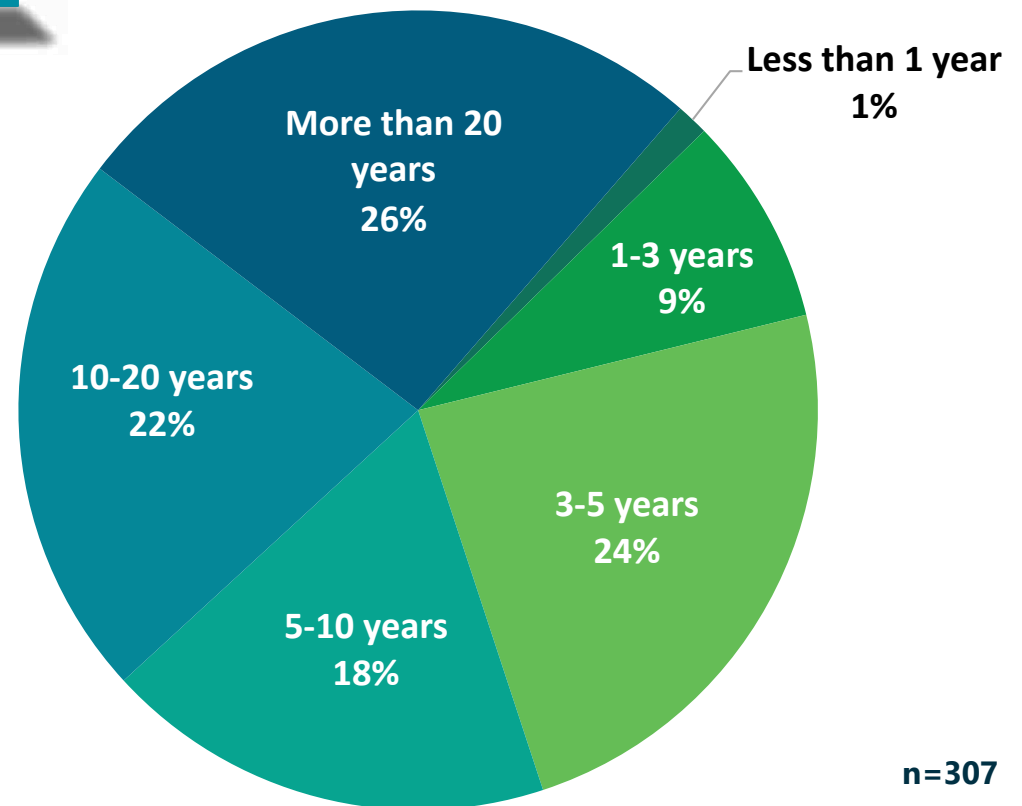
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# Response Demographics



*How long have you been working in PLM?*

**CIMdata comment:** An excellent spread of respondents. Only 48% have been at this for more than 10 years, much less than previous years.



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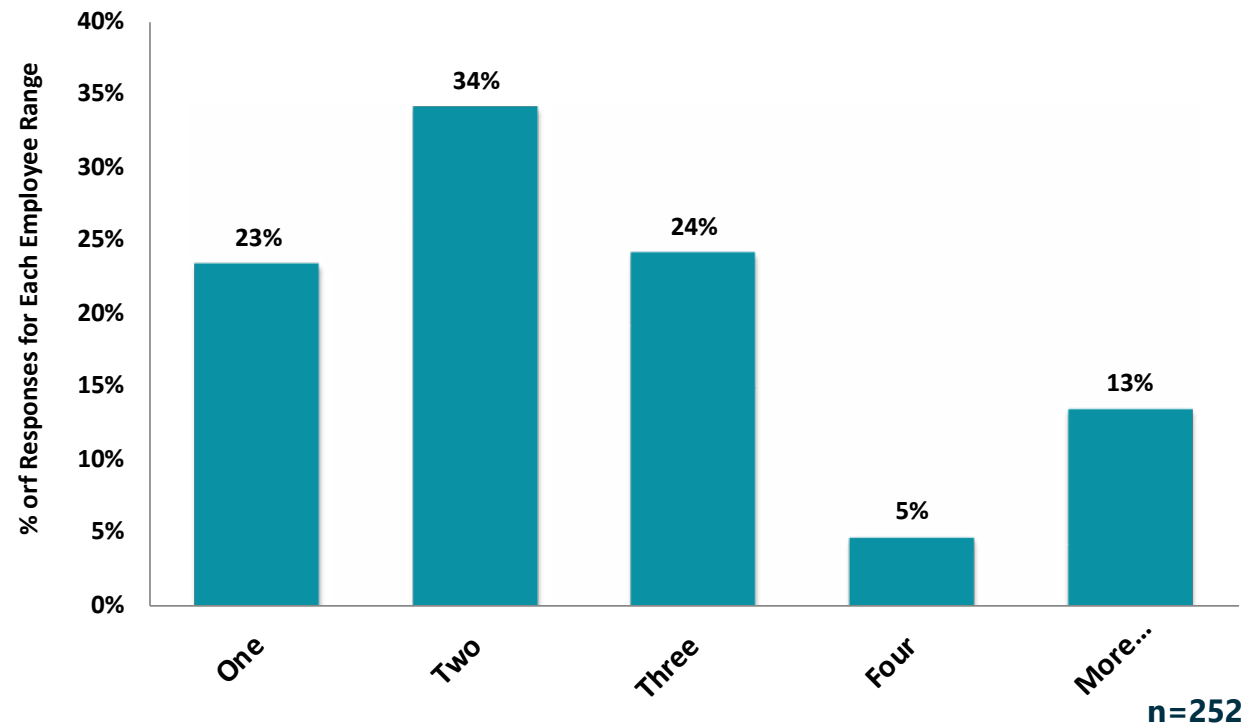


# Response Demographics



*How many commercially available PLM solutions are currently in operation within your company?*

**CIMdata comment:** ~77% of the respondents have more than one PLM solution. This is consistent with CIMdata's industrial consulting work, where many large companies built through mergers and acquisitions have many solutions in place.

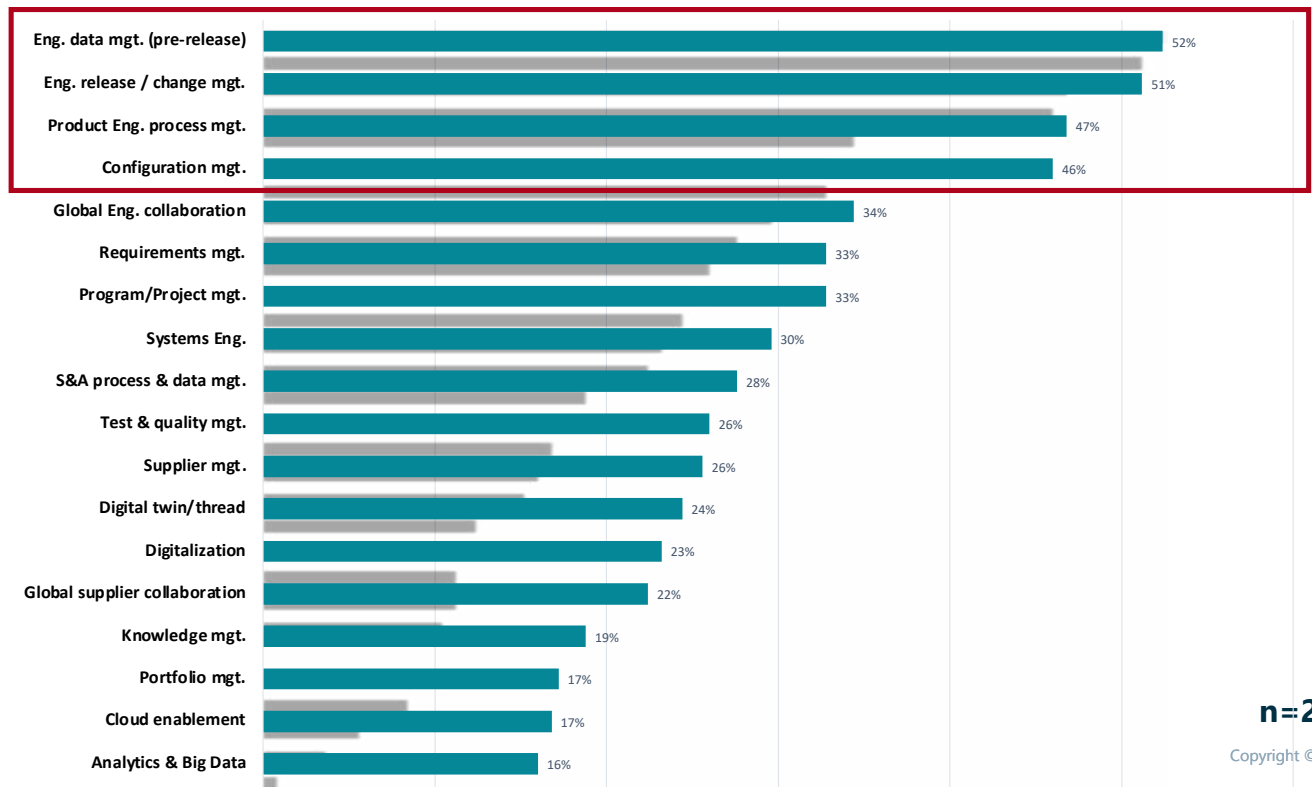


# Implementation Status



*What is the business process scope of your current generation PLM solution?*

**CIMdata comment:** Heavily weighted towards the “traditional” PDM aspects of PLM. This is consistent with CIMdata’s experience. Others: CRM & materials, labs, etc.



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# PLM Financials



*What is your current annual PLM budget?*

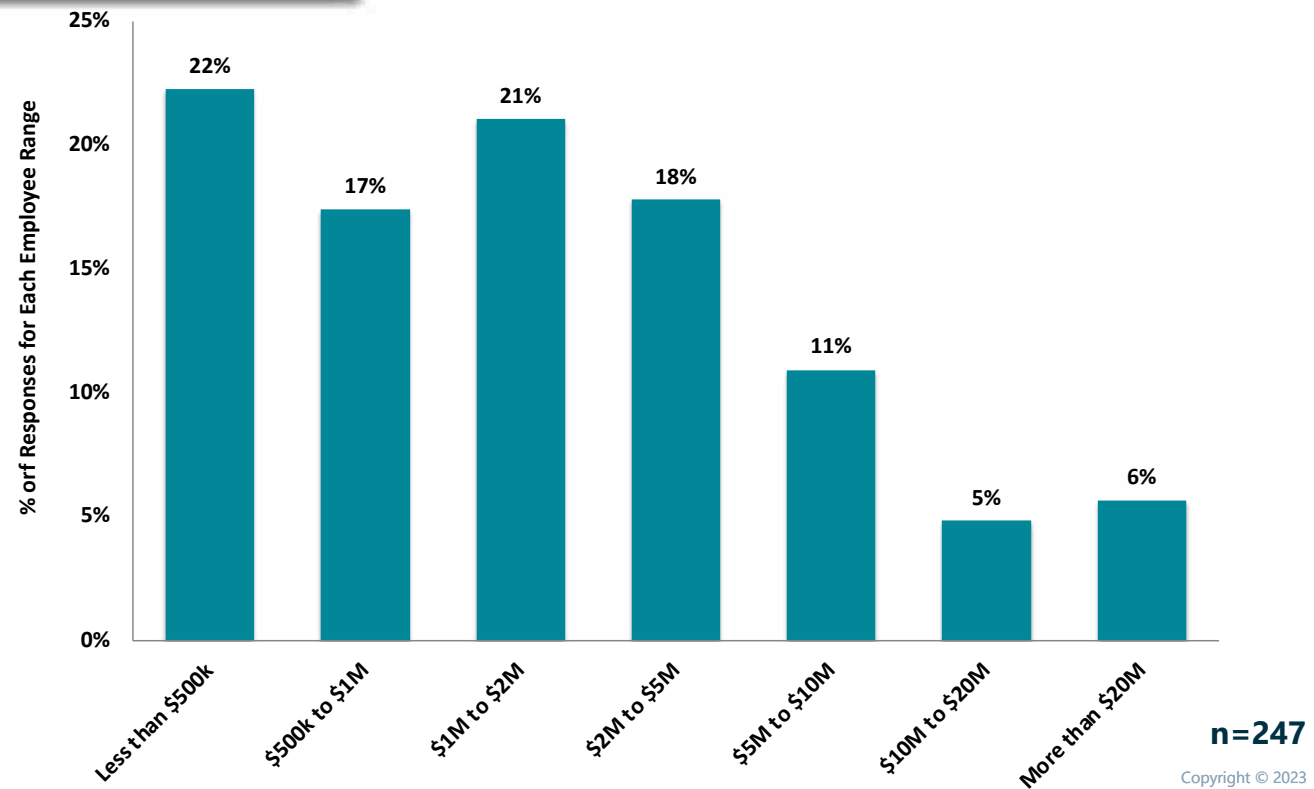
**CIMdata comment:** A good cross section of implementation sizes, with 61% spending more than US\$1 million each year.

**2022:** 47%

**2021:** 52%

**2020:** 58%

**2019:** 43%





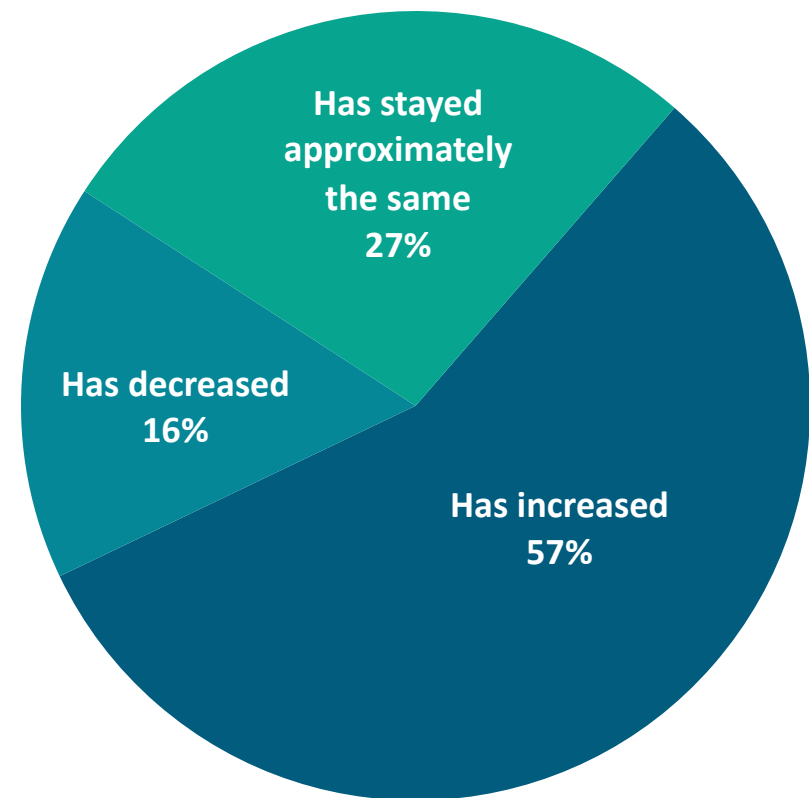
# PLM Financials



*What is your PLM budget trend from the previous two years?*

**CIMdata comment:** A continued positive sign that companies find PLM worth spending money on. **84%** stated increased or stayed the same.

<b>2022:</b> 88%	<b>2019:</b> 80%
<b>2021:</b> 82%	<b>2018:</b> 76%
<b>2020:</b> 84%	



**n=247**

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# PLM Financials



*What is your expected PLM budget trend for the next two years?*

**CIMdata comment:** A positive sign for continued investment. **62%** will increase. Same as 2022.

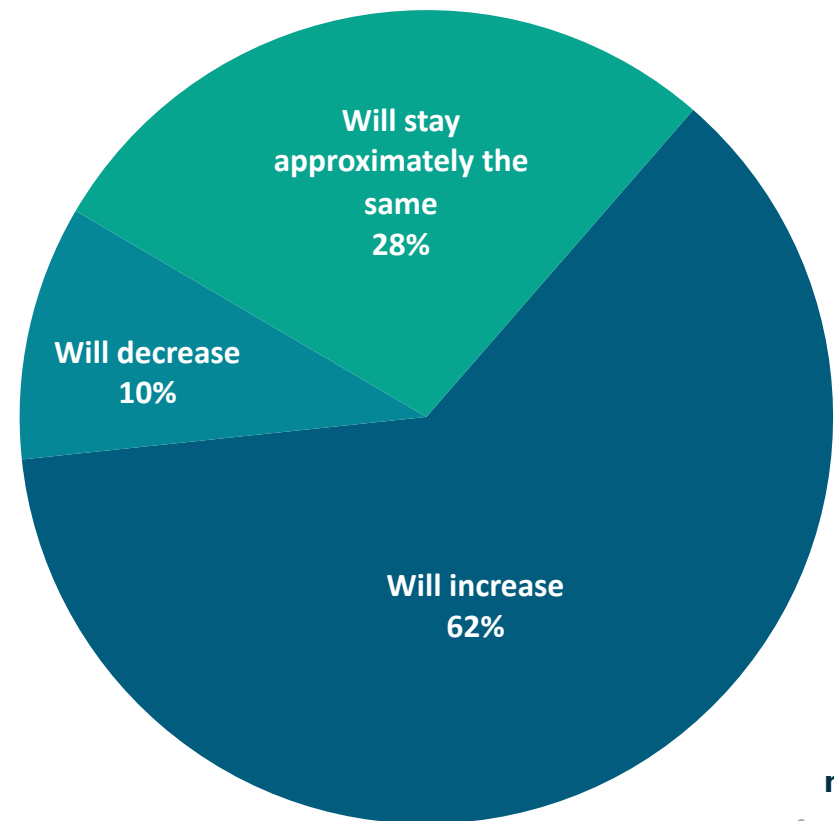
**2022:** 62% Will increase

**2021:** 51%

**2020:** 42%\*

**2019:** 64%

**2018:** 48%



**n=247**

# PLM Investment



*What business process areas will you invest in for your future PLM solution and what is the time frame for each investment area?*

**CIMdata comment:** Short-term still mostly focused on “traditional” areas. Mid-term spread across traditional & non-traditional areas. Long-term non-traditional areas. Others: Multi-CAD Data Management, Sustainability and Circular Economy, Ideas management, Data integration across all systems involved in the product lifecycle, and many others.



# PLM Investment



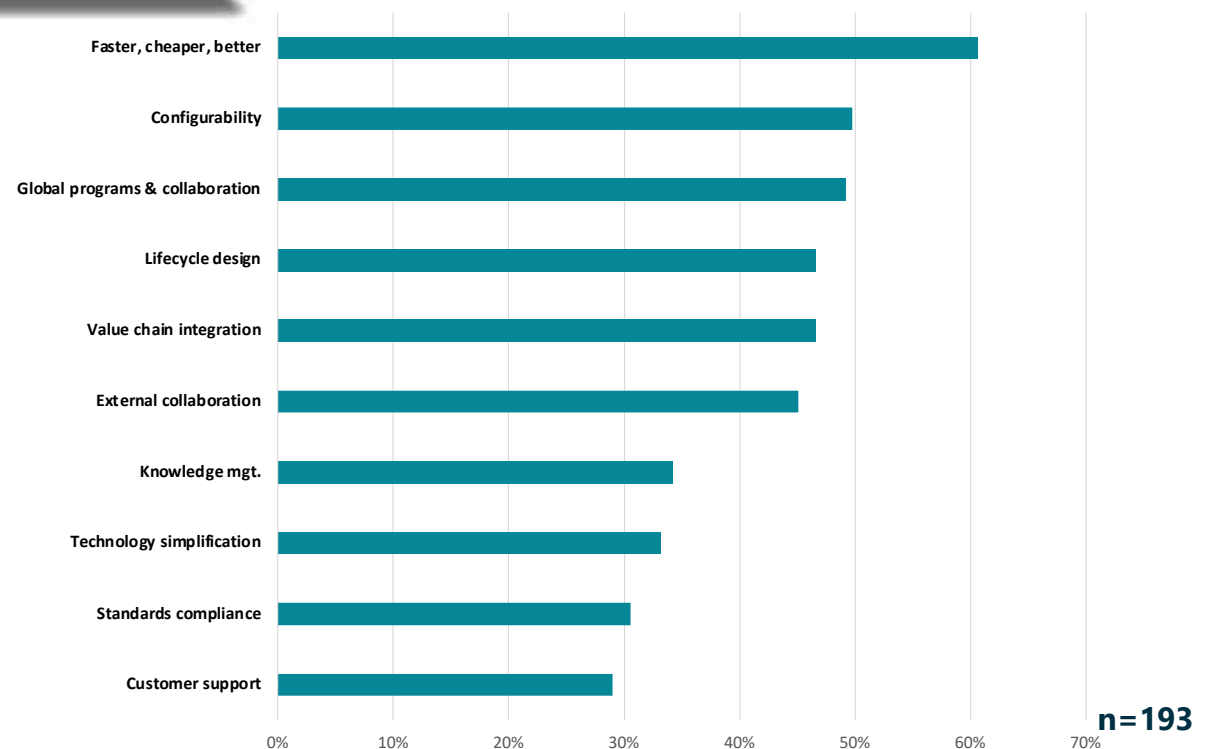
*What are the established business objectives for your future PLM solution?*

**CIMdata comment:** Significant future focus getting faster, better, cheaper. Same as in 2019, 2020, 2021 & 2022.

Configurability moved up two spots.

Global program & collaboration down one spot.

Lifecycle design moved up one spot.



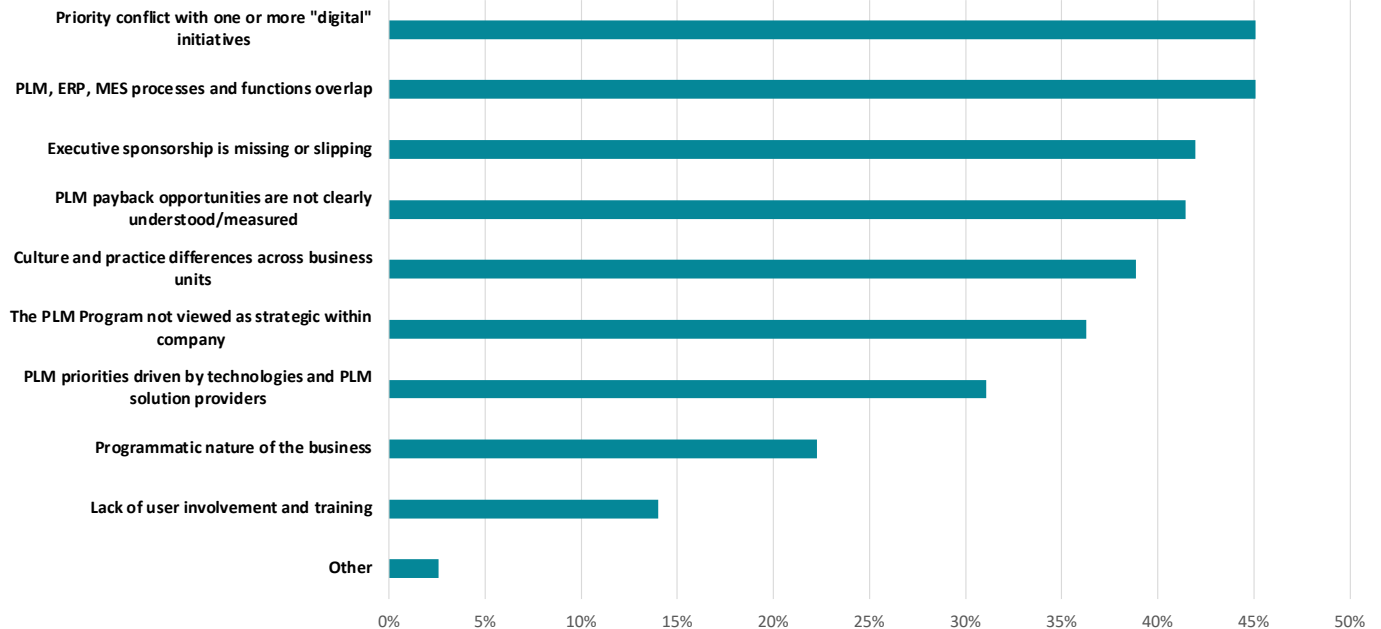


# Investment Challenges



*What are the major challenges to be overcome for successful PLM?*

**CIMdata comment:** “Culture and practice...” moves down 4 spots. “Priority conflict...” moves up 2 spots. Others moved as well.



**n=193**

# PLM's Future



*What does your company's management think of PLM?*

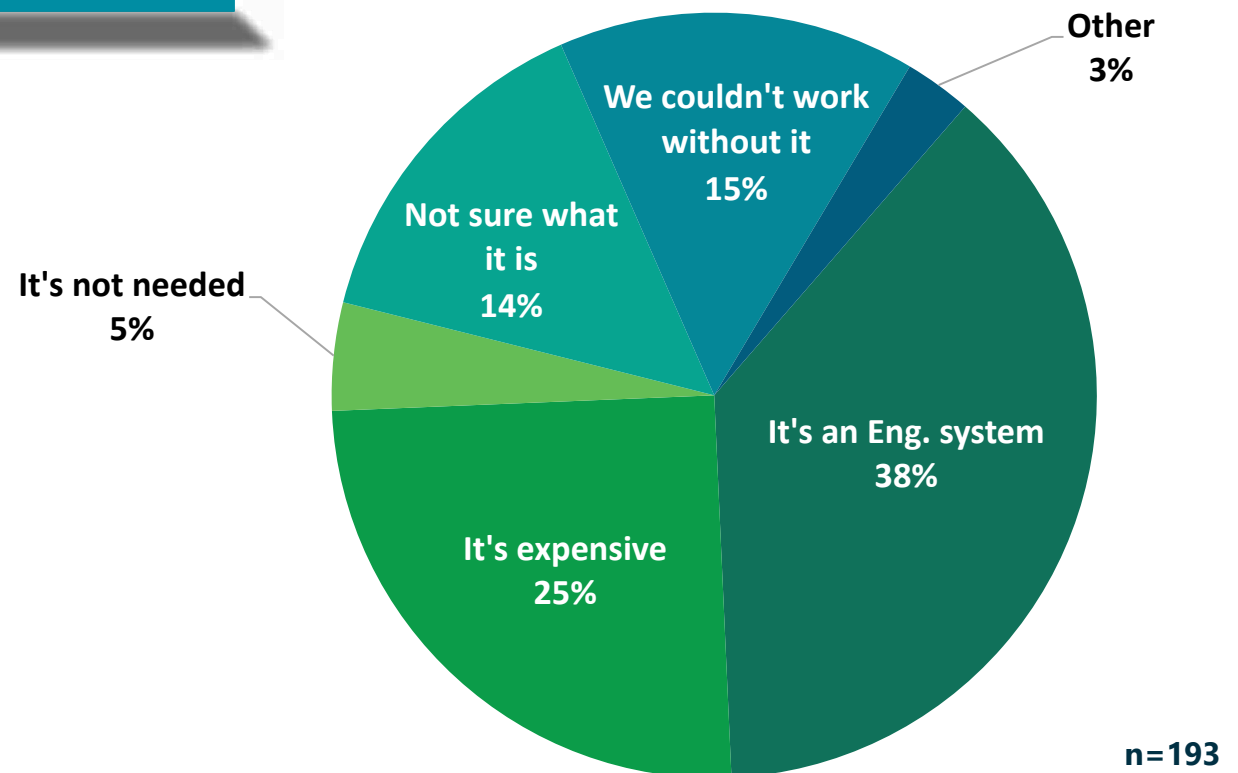
**CIMdata comment:** There is a significant value disconnect. Only 15% couldn't work without it.

**2022:** 16% couldn't work without it

**2021:** 20%

**2020:** 14%

**2019:** 16%



# PLM's Future



*Has the term PLM run its course?*

**CIMdata comment:** A significant majority still believe that the term PLM has value.

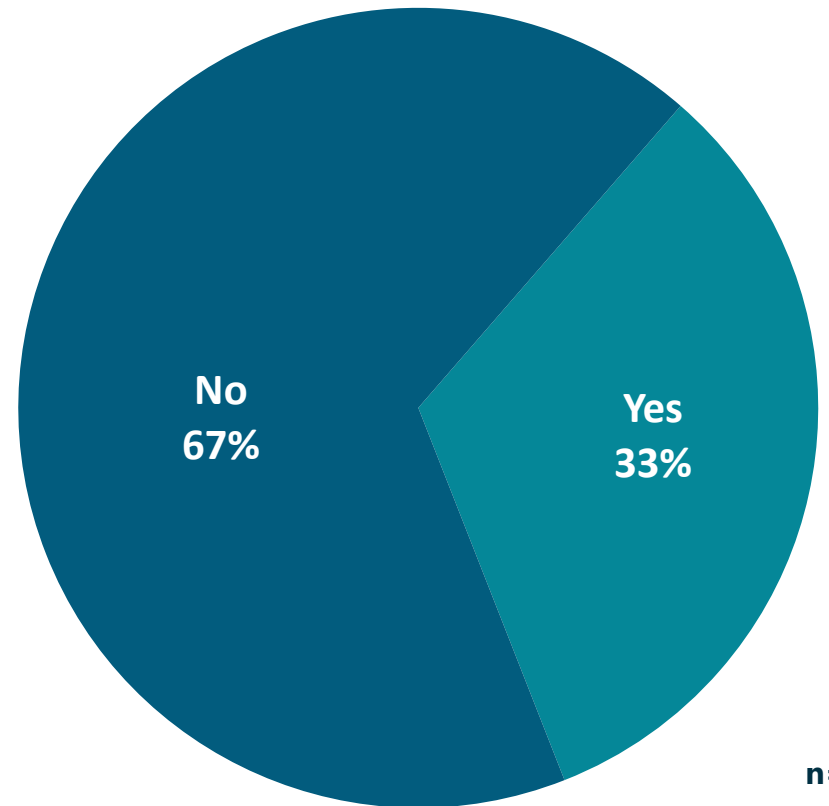
**2022:** 38% Yes

**2021:** 31%

**2020:** 44%

**2019:** 52%

***Please join our webinar on May 11, 2023 for a full review of our 2023 PLM Status & Trends survey.***



**n=193**

# What CIMdata Has Been Saying



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

ARTICLE

**The Future of PLM: CIMdata Spotlights Leading CEO's**



ARTICLE

**How to Meet Industrial Digital Transformation Challenges With Virtual Prototyping Technologies**

A CIMdata commentary on ESI's predictive, real-time, & immersive virtual testing and how it supports the democratization

31 January 2023  
by Tom Gill

ARTICLE

**Digital Transformation: New Techniques and Technologies Disrupt Accumulated Expertise**



ARTICLE

**As Data Becomes Digital Threads**



**Also in this Issue**

February 9, 2023

Nuclear | Feb 9, 2023

Sustainability

**Accelerating the Transition to Green Energy with Product Lifecycle Management**






# 2022 PLM Market – Overall State



*PLM market—overall growth of 8.6%*

- The global PLM market fell short of CIMdata's forecast
  - Overall, the PLM market was up 8.6% to \$65.8 billion (vs. forecast of 10.1%)\*
  - cPDm sector @ \$20.7B (8.1%); solid software and services growth
  - Tools sector @ \$44.2B (8.9%); led by significant EDA growth
  - Digital Manufacturing sector @ \$893M (2.1%)
- Continued movement towards subscription
  - E.g., Autodesk & PTC finished; others, Siemens, ramping up
- Digital Transformation driving PLM investments
  - Led by major service providers, e.g., Accenture & Atos, expanding their reach
  - Major PLM players are differentiating & expanding their reach

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# Today's Major Trends & Potential Disruptors



*A convergence of ideas, technologies, strategies, and associated complexities*



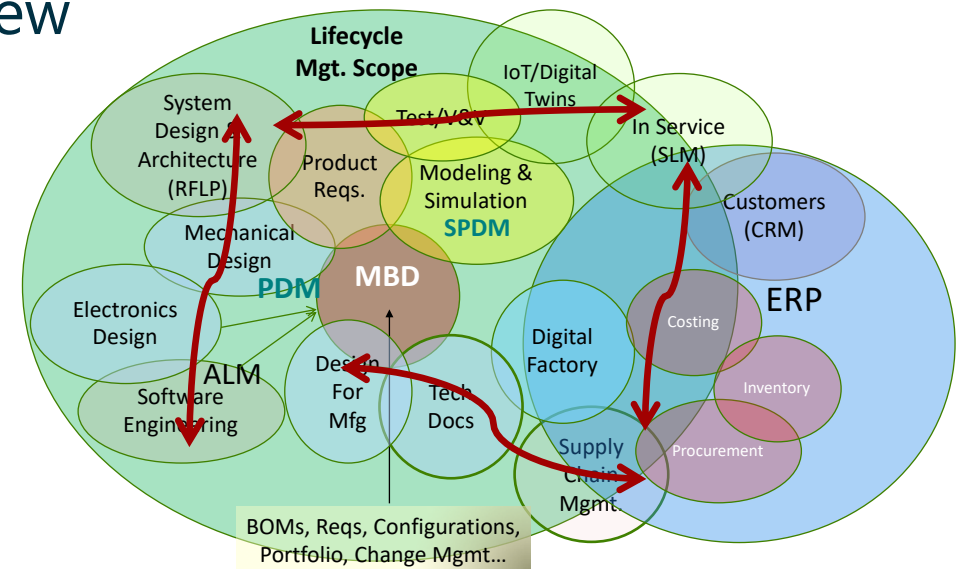
# Digital Thread



*CIMdata's preferred definition*

- Digital Thread refers to the communication framework that allows a connected data flow and integrated view of an asset's data (i.e., its Digital Twin) throughout its lifecycle across traditionally siloed functional perspectives

***Digital thread is enabled and supported by a robust end-to-end and connected systems model and MBSE processes***



Extracted from: [https://www.dodmantech.com/ManTechPrograms/Files/AirForce/Cleared\\_DT\\_for\\_Website.pdf](https://www.dodmantech.com/ManTechPrograms/Files/AirForce/Cleared_DT_for_Website.pdf)

Also see: <http://www.manufacturing-operations-management.com/manufacturing/2016/04/what-is-the-digital-thread-and-digital-twin-definition.html>

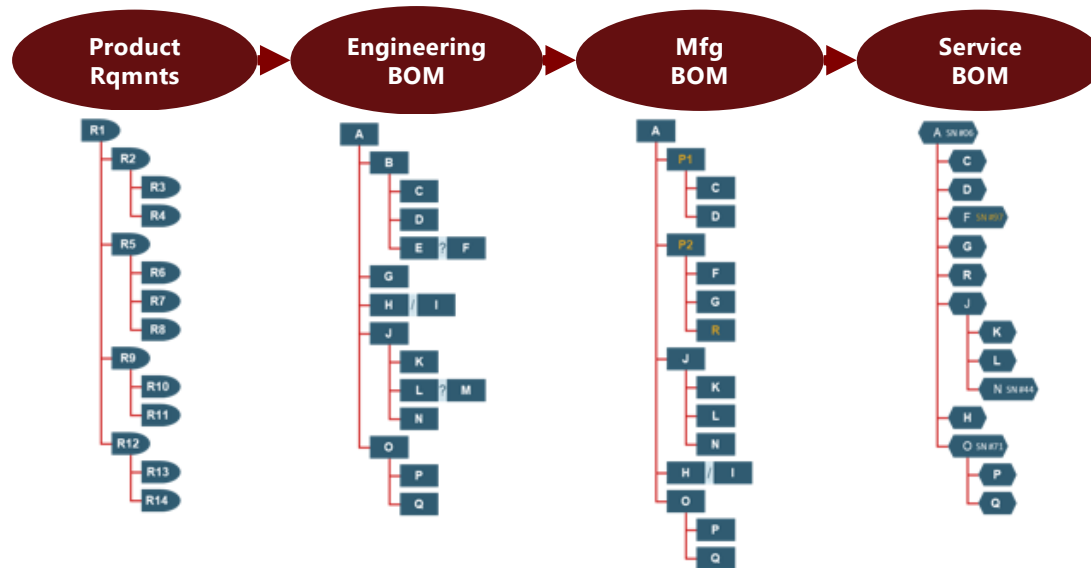


# E2E: Lifecycle Product Structures

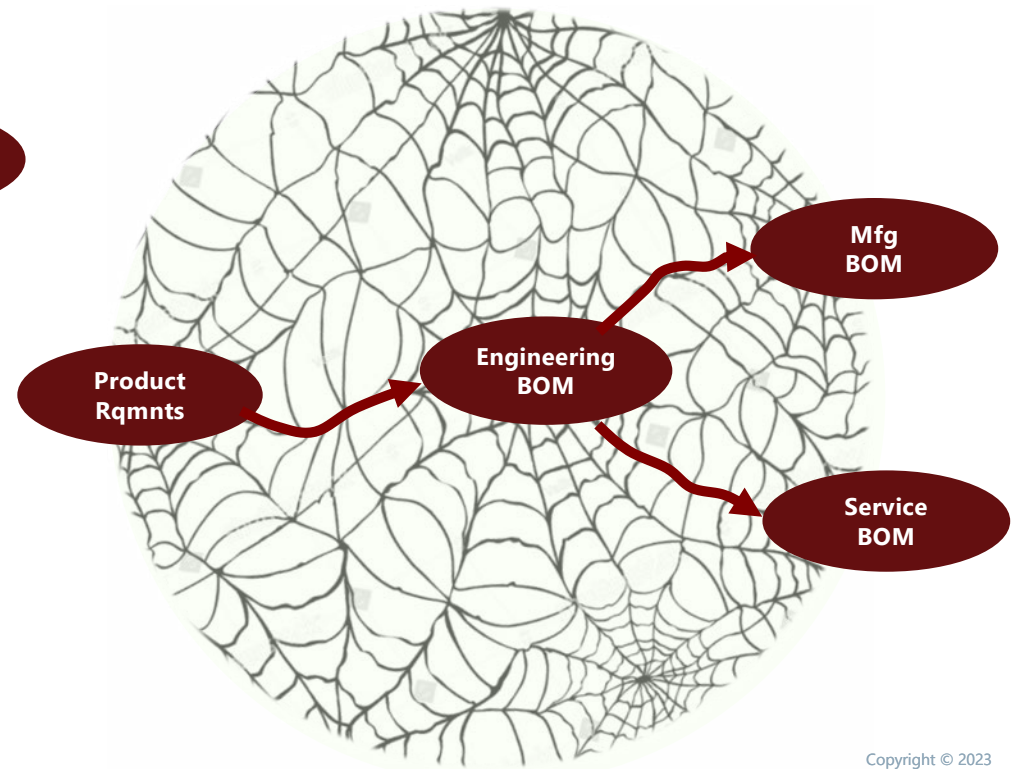


Connections between the four principal structure configurations – Thread vs. Web

## Product Lifecycle Timeline Sequence (Thread)



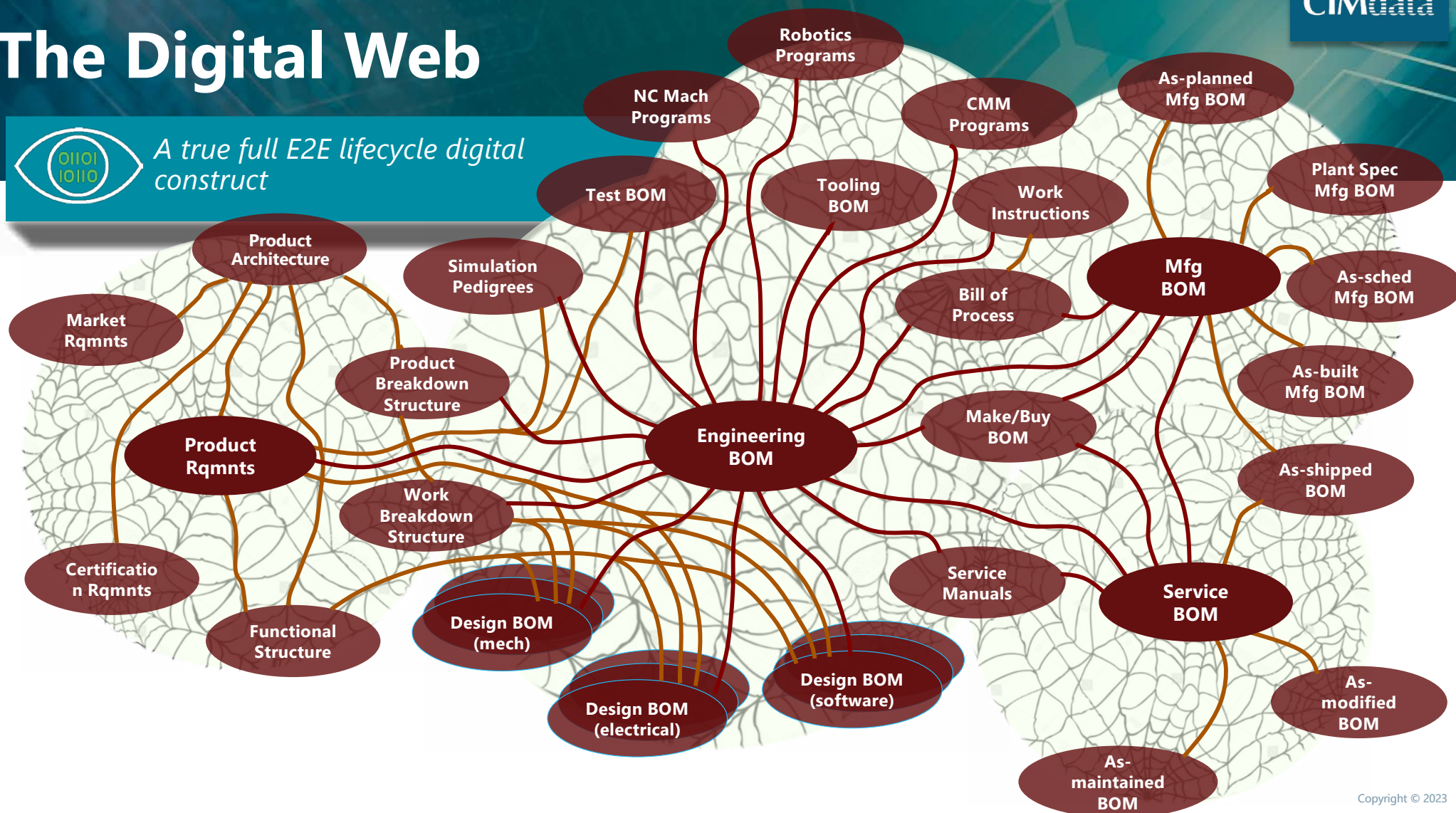
## Derivative Dependencies (Web)



# The Digital Web



*A true full E2E lifecycle digital construct*



# Digital Twin



*A digital representation of products and/or services at any point throughout the lifecycle*

- A **virtual representation** (i.e., digital surrogate) of a physical asset or collection of physical assets (i.e., physical twin) that exploits data flow to/from the associated physical asset(s).



Digital Twin of the Product



Digital Twin of Production



Digital Twin of Service

***Digital twin is enabled and supported by a robust end-to-end and connected systems model and MBSE processes***



# Digital Twins



## Key characteristics

- There are multiple Digital Twins for different purposes, each have specific characteristics
  - For example, Data Analytics Digital Twins, MRO Digital Twins, Financial Digital Twins, Engineering Digital Twins, and Engineering Simulation Digital Twins
- Each Digital Twin must have a physical twin (i.e., a physical asset)
  - A virtual representation can and should exist prior to its physical twin
  - The physical asset can be a plant, a ship, infrastructure, a car, etc.
- Each Digital Twin must communication with its Physical Twin
  - It does not have to be real time or electronic

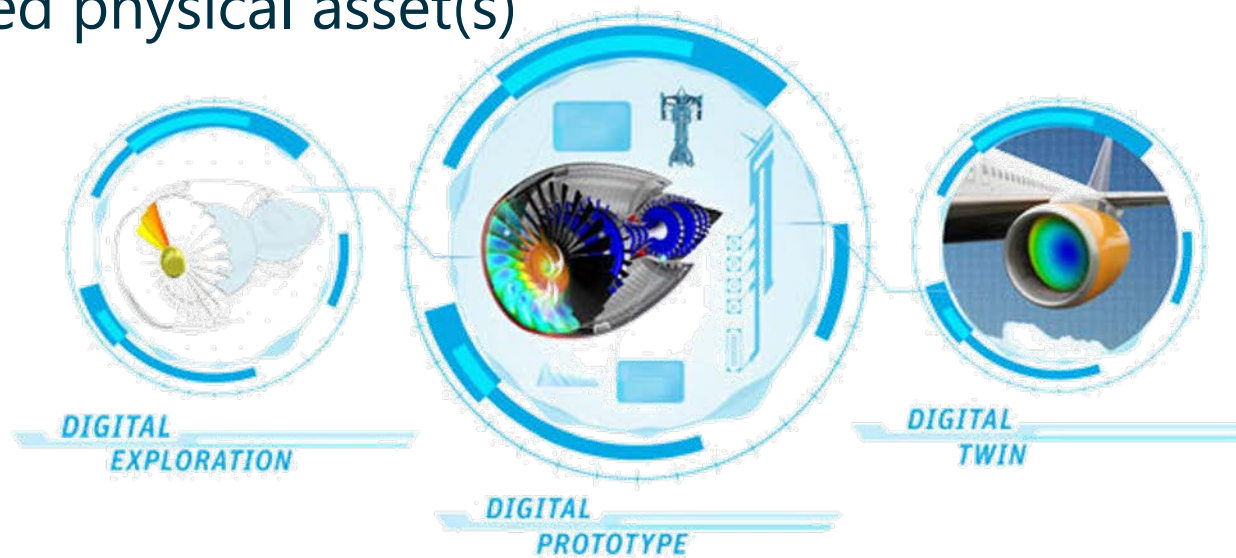


# Engineering Simulation Digital Twin



*CIMdata's preferred definition*

- A **physics-based virtual representation** of a physical asset or collection of physical assets (physical twin) that allows simulations of the associated physical asset(s)



*(Courtesy of Ansys)*

# Creating & Maintaining the Digital Twins



*Digital Twin vision cannot be achieved without a full product/process model*

## Digital Twin -- From Design to Operation

Physical Asset

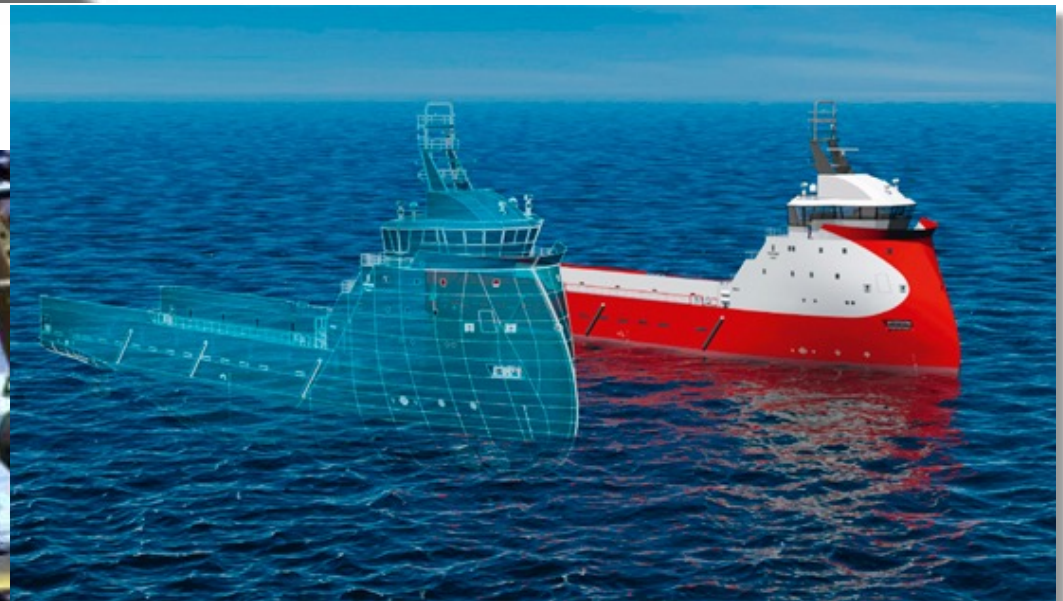


CAD Courtesy of Volvo Cars

Virtual Prototype



Physics-based analytics to

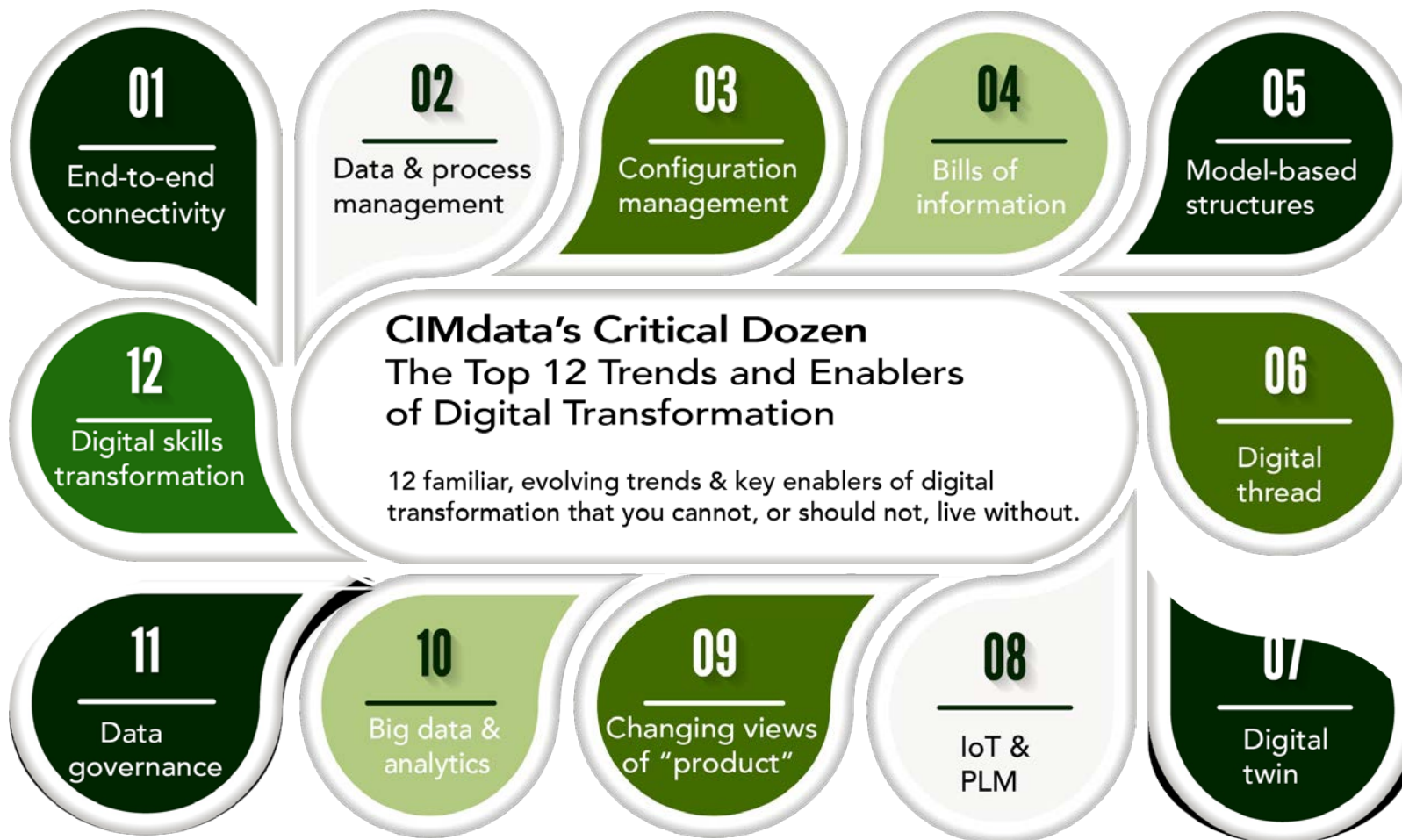


<http://blogs.dnvgl.com/software/2016/04/digital-twins-structural-engineering/>

<http://www.ansys-blog.com/digital-twin-pump/>

<https://community.plm.automation.siemens.com/t5/Tecnomatix-News/Digital-Twin-Blurring-the-lines-between-reality-and-simulation/ba-p/333483>

# CIMdata's Critical Dozen





# Agenda

- What's New from CIMdata
- 2022: The Year in Review
- 2023: Today's Trends & Challenges
- Looking Towards the Future
- The Digital Thread: Powering Business Transformation
- Concluding Remarks



# Top Strategic Tech Trends



*Gartner's Top Strategic Technology Trends*

## 2021

1. **Internet of Behavior**
2. Total Experience
3. Privacy-Enhancing Computation
4. **Distributed Cloud**
5. **Anywhere Operations**
6. Cybersecurity Mesh
7. Intelligent Composable Business
8. **AI Engineering**
9. **Hyperautomation**

<https://www.gartner.com/smarterwithgartner/gartner-top-strategic-technology-trends-for-2021/>

**Direct connection**

<sup>62</sup> Indirect/secondary connection

## 2022

1. **Data Fabric**
2. Cybersecurity Mesh
3. Privacy-Enhancing Computation
4. **Cloud-Native Platforms**
5. **Composable Applications**
6. **Decision Intelligence**
7. **Hyperautomation**
8. **AI Engineering**
9. Distributed Enterprises
10. Total Experience
11. **Autonomic Systems**
12. **Generative AI**

<https://www.gartner.com/en/information-technology/insights/top-technology-trends>

## 2023

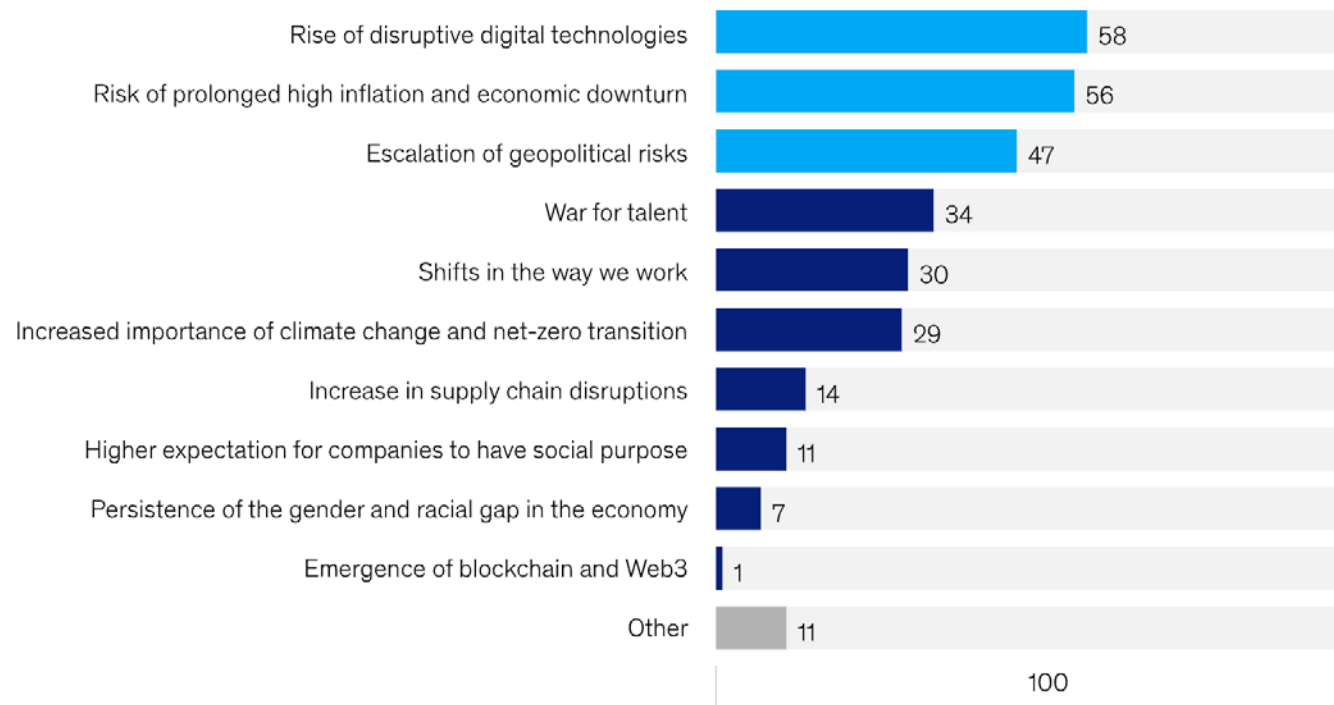
1. Digital Immune System
2. Applied Observability
3. AI Trust, Risk and Security Management (AI TRISM)
4. **Industry Cloud Platforms**
5. **Platform Engineering**
6. Wireless-Value Realization
7. Superapps
8. Adaptive AI
9. **Metaverse**
10. **Sustainable Technology**

<https://www.gartner.com/en/articles/gartner-top-10-strategic-technology-trends-for-2023>

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# What CEO's Are Saying

**Trends that have the biggest impact on how CEOs are leading their organizations in 2023,<sup>1</sup>**  
% of respondents (n = 73)



<sup>1</sup>Question: From your perspective as a current or former CEO, which of the following trends will have the biggest impact on how you lead/would lead your organization in 2023 and beyond, compared with past years? Respondents selected their three most important trends.  
Source: McKinsey CEO Excellence Survey

# Other Areas of Activities



*Just a few words on a few other areas of accelerated PLM-related investment*

- Enterprise platform implementations for digital thread/twin enablement
  - e.g., Aras, CONTACT, Cassini, Dassault Systèmes, PTC, and Siemens\*
- Movement to full cloud-enablement and SaaS delivery
  - e.g., Aras, Dassault Systèmes, Oracle, PTC, SAP, and Siemens\*
- Continued acquisitions (much more on this later)\*
  - ISVs continue to buy their VARs
  - Accenture slowed down from their M&A peak last year
- AI is presenting new possibilities in terms of how to do work

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# This Year's Market & Industry Forum Theme



*The Digital Thread: Powering Business Transformation*

- When PLM was defined in the late 1990s, CIMdata was already promoting the notion of the bill of information (BOI)
  - An info network that fully captures the virtual product & associated processes
- Today, the phrase is “the digital thread” and it has been adopted broadly by industry, governments, and the PLM Economy
  - Unfortunately, many of actors mean quite different things by the same set of words, an all-too-common occurrence
- In this Forum, CIMdata will highlight the overall issue, and then focus on how the global PLM Economy is responding and how well their industrial clients are achieving their digital thread objectives

# Agenda – Day 1 (April 18<sup>th</sup>)



2023 PLM Market & Industry Forum (1 of 2)

- **State of PLM - Today's Market and Leading Trends**  
*Peter Bilello, President & CEO*
- **2022 Market Analysis Results**  
*Stan Przybylinski, Vice President*
- **2022 Market Analysis Results – Japan**  
*Satoshi Ezawa, Japan-Rep (MetaLinc, President)*

# Agenda - Day2 (April 19<sup>th</sup>)



2023 PLM Market & Industry Forum (2 of 2)

- **The Digital Thread: Powering Business Transformation**
  - **The Promise of the Digital Thread** - Stan Przybylinski
  - **The Digital Thread: The Industrial Perspective** - Peter Bilello
  - **The Digital Thread: The PLM Economy Perspective** - Stan Przybylinski
- **Updates on Key Topics**
  - **The Green Energy Transition** - Stan Przybylinski
  - **Data Governance in the Era of the Digital Thread** - Peter Bilello

# Agenda

- What's New from CIMdata
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# Concluding Remarks



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

- 2023 – CIMdata's 40<sup>th</sup> year of defining, tracking & working in the global PLM market...we are happy to be your growth partner
- The global PLM economy is growing and continues to add value
- Multiple disconnects still exist, e.g., prioritization of digital initiatives, and managements narrow understanding of lifecycle management
- To be successful, companies need to transform people, processes and technologies—partial solutions don't get the job done
- The digital thread is really a digital web—key to true E2E traceability
- Data governance and sustainability are lifecycle issues

# Questions & Answers

CIMdata



*What's on your mind?*



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



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