



PLM 2025-35 PLM Body of Knowledge

Project Proposal

Version 4.0

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PLM has been a recognised discipline for more than two decades, but the knowledge and expertise gained over that period has never been captured.

The *Professional PLM Initiative* has highlighted the general lack of progress of PLM over this time, and identified the creation of an internationally-agreed Body of Knowledge as an industry need.

The PLMIG has established the PLM 2025-35 Project as a mechanism for user, supplier, adviser and academic organisations to collaborate in sharing knowledge and structuring it for productive global use.

The Project is designed to provide direct and specific benefits across all three areas of the PLM Solution Map that was created from industry input over the latter part of 2025.

This document is a Proposal for the PLM Interest Group to manage and support the creation of a PLM Body of Knowledge over its first twelve months, and explains how organisations of all types can participate.

Foreword

The aim is not just to capture, codify and understand the global Body of PLM Knowledge.

The aim is not even to know how to implement it in the real world.

The aim is to have embodied the results and benefits of this knowledge into every participating implementation in a way that can be built upon year-on-year.

1 INTRODUCTION

The PLM 2025-35 Project has long-term aims of establishing an agreed Industry Vision for the next 10 years, and then helping the PLM industry to achieve it.

The first step in this journey is to develop a Body of Knowledge that captures the learnings of the past two decades in a structured and useable form. This will not only show the 'As-Is' situation (which can then be reviewed and advanced), but will create a reference model that is of direct use to everybody who works in PLM.

This is an entirely practical exercise. The Body of Knowledge project is structured so that user companies can share methods and best practices amongst the participating group, and get specific solutions to the more complex problems and issues that they face.

The learnings are distilled into a neutral format, which is then reviewed and developed by a parallel group of organisations from all parts of the industry.

There are two key features to this Project. The first is that it is highly interactive, so that participants get new specific new tools they need in the course of sharing and developing the knowledge. The second is that it follows the PLM Solution Map approach developed from extensive industry discussions during Q4 2025.

The result is a holistic, year-long collaboration that will transform the ease and efficacy of PLM implementation.

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3 BACKGROUND

3.1 PLM Knowledge

User companies are the reason that PLM exists – without businesses that make products there would be no need for all the effort. And effort is what it is. When scaled up to large corporations, the complexity of that effort leads each company to generate its own methodologies based on what is found to work best. These can embody many man-years of experience and learning.

Until now there has been no mechanism or platform for companies to share their good practices and solutions with each other, so that everyone can implement PLM right first time. Neither has anyone distilled these learnings into a Body of Knowledge that the industry can use.

3.2 Two Working Streams

The PLM 2025-2035 project provides just such an industry-wide platform. It will run annually, aligned with the natural pace of actual PLM implementations and consisting of two streams:-

- **User Collaboration**, comprising user companies only; and
- **Knowledge Development**, in which organisations from all parts of the industry can participate.

User companies collaborate by inputting technical and business issues they would like solutions for. The PLMIG works with the companies respectively and as a group to structure and develop these, and provide working material that each company can apply directly. The PLMIG will distil the underlying theory into neutral structures that will then become part of the Body of Knowledge stream.

The Knowledge Development stream is open to organisations of all types and all parts of the industry. By working in a neutral format, vendors, integrators, advisers and educators can collaborate safely without needing to share proprietary information. The PLMIG will manage the collaboration, produce the working documentation and publish the Body of Knowledge.

3.3 Enterprise-Wide Scope

The aim is to produce actual, measurable results across the whole enterprise, at all levels of the organisation, in all aspects in which PLM impacts the business.

This means that not only will the knowledge be defined, but practitioner skills and professionalism will be enhanced, so they can apply the knowledge; and tools will be provided to enable senior management acceptance and change.

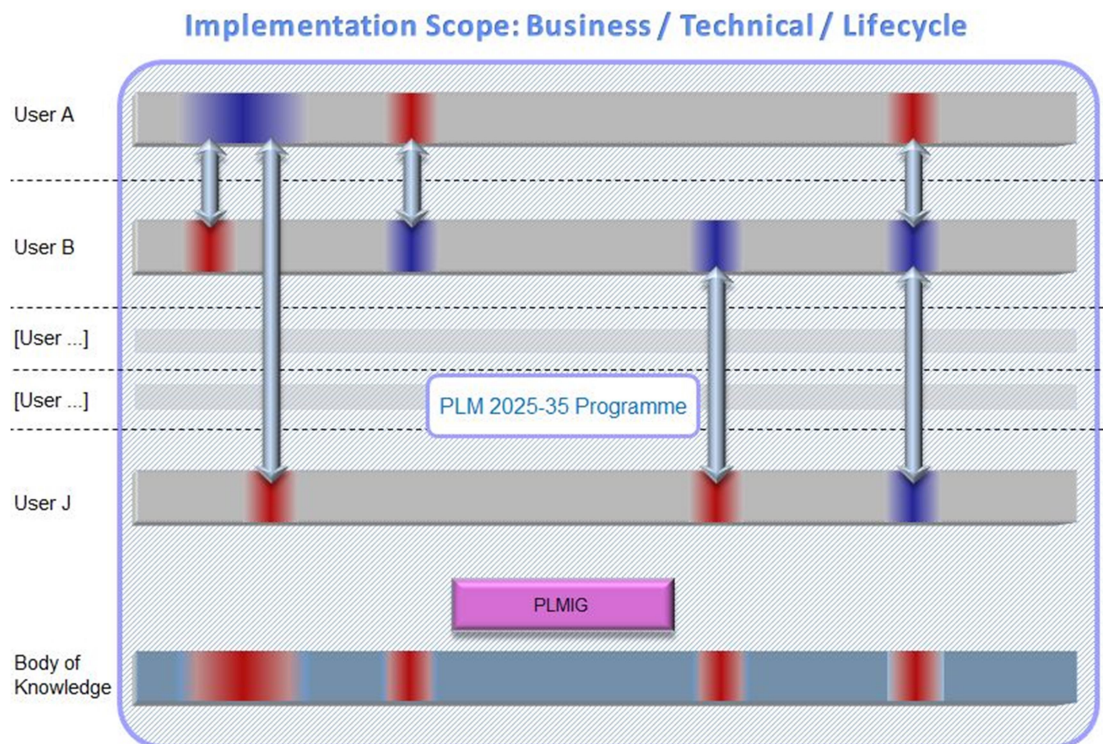
This complete scope is built into the Project structure, as explained in the PLM Solution Map.

4 HOW IT WORKS

4.1 User Collaboration

The principle is very straightforward. If you take a notional 10 mature corporate implementations, then they will all have reached a similar advanced [grey] level.

Because they all evolved in isolation then they will have their own strengths [red] and weaknesses [blue].



If their PLM Teams could talk to each other in detail, over time, then by swapping ideas and methods they would pass solutions to each other, to everyone’s benefit.

So, in the diagram, User J would pass its more advanced knowledge to Users A and B, and would be helped with another issue by User A. User B would help with a problem of User A, and be helped in turn by Users A and J; and so on.

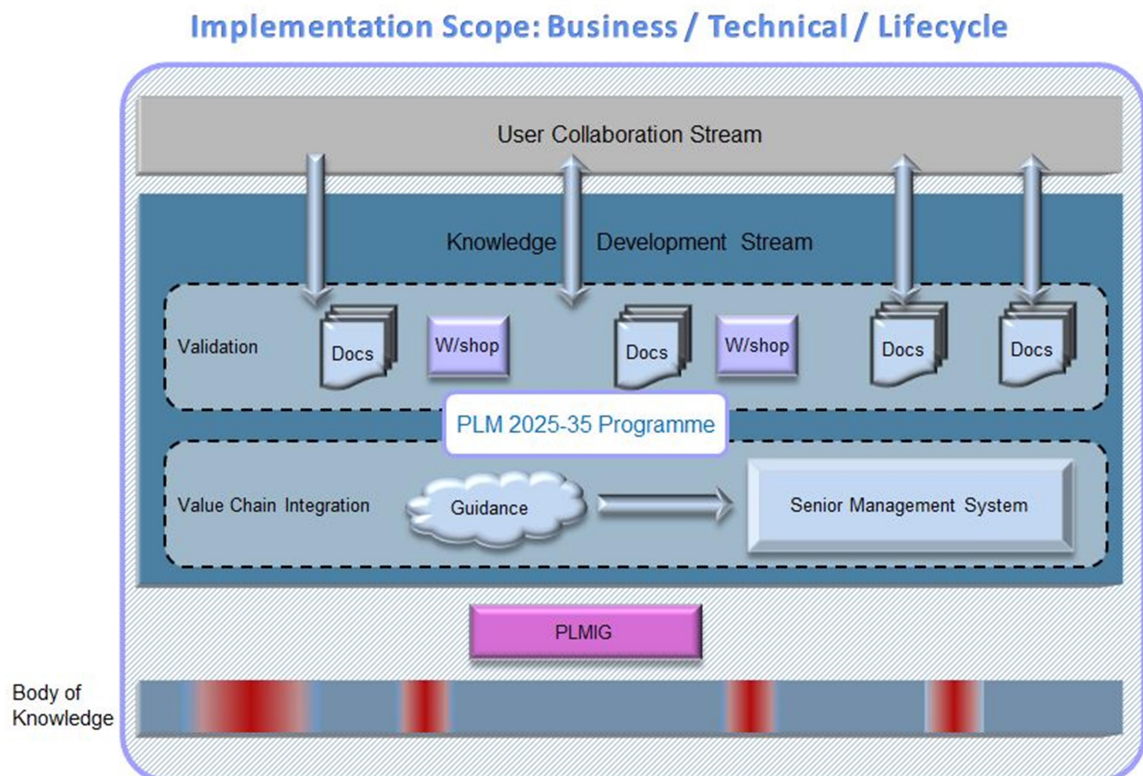
However, in the real world, few people have time to do this on a sustained basis, and also the technical analysis is very difficult to do. The PLM 2025-35 Programme solves this by providing an integrated framework that everyone can fit into.

The outcome is that all of the user companies go from ‘blue’ to ‘red’, confidently applying the new best practices across their implementations; and the kernel of the Body of Knowledge is built from the real-world conclusions.

4.2 Knowledge Development

The Knowledge Development stream is equally proactive. It has two main activities:-

- To review, validate and structure the findings from User Collaboration; and,
- To use its expertise to guide the development of the Senior Management System.



The User Collaboration activities will generate a wealth of new tools and material, and the PLMIG will structure it into a neutral and practical format, but that is only part of the process. Before it can become accepted as part of the industry-wide Body of Knowledge it must be assessed, refined and agreed by a Panel of organisations that are likely to be impacted by it. The group expertise within this stream provides these capabilities, and its work feeds back to the Users as the Project progresses.

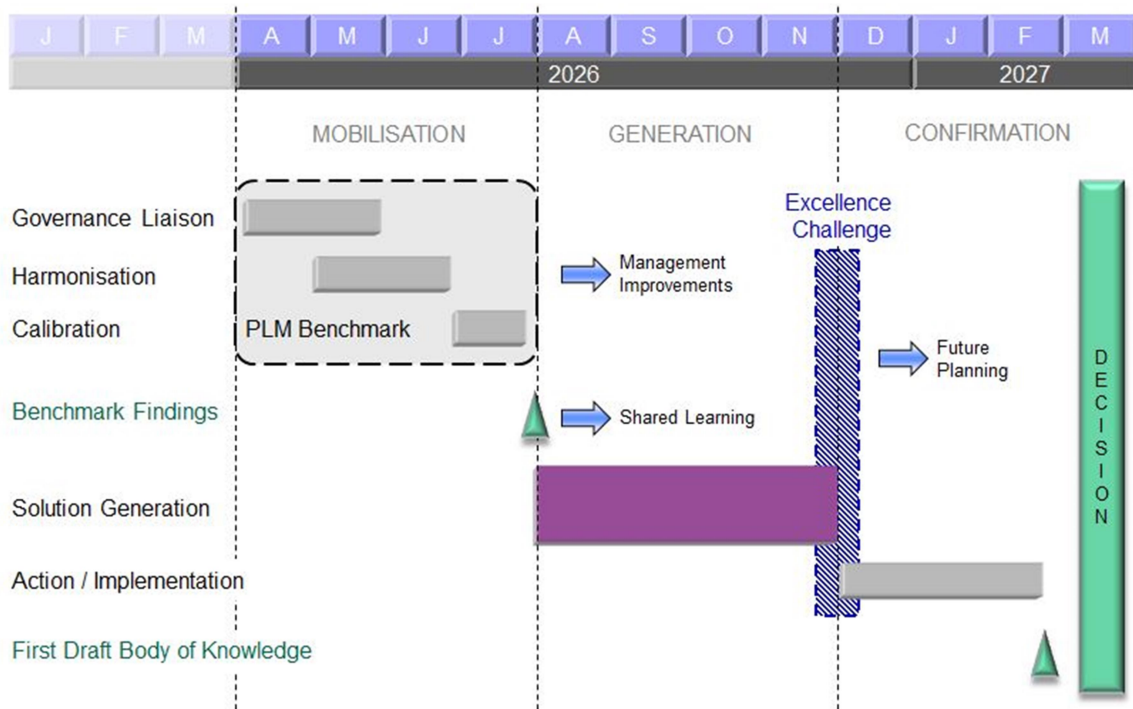
A valuable feature of the Knowledge Development group is that its members are much more likely to work at C-level as a matter of course. Vendors, consultancies, integrators and other corporate providers have the opposite problem to PLM Teams: they can pitch directly at Board level, but do not have the internal pathways within the organisation.

The Knowledge Development stream is therefore well placed to generate the Value Chain Integration framework that will be a major part of the Senior Management System.

5 METHODOLOGY

5.1 User Collaboration

The two streams are synchronised in three phases: Mobilisation, Generation and Confirmation.



In Mobilisation, the first step is for all of the participants to get aligned so that meaningful conversations and comparisons are possible. It begins with **Governance Liaison**, using the PLMIG Self-Assessment and Benchmarking tools to produce Navigation Models that show the emphasis of each implementation. In **Harmonisation** the questions and ideas are discussed and rationalised by the participants; and **Calibration** rationalises this and positions everyone for the detailed work. All of this is enacted within the Benchmarking framework (Section 6).

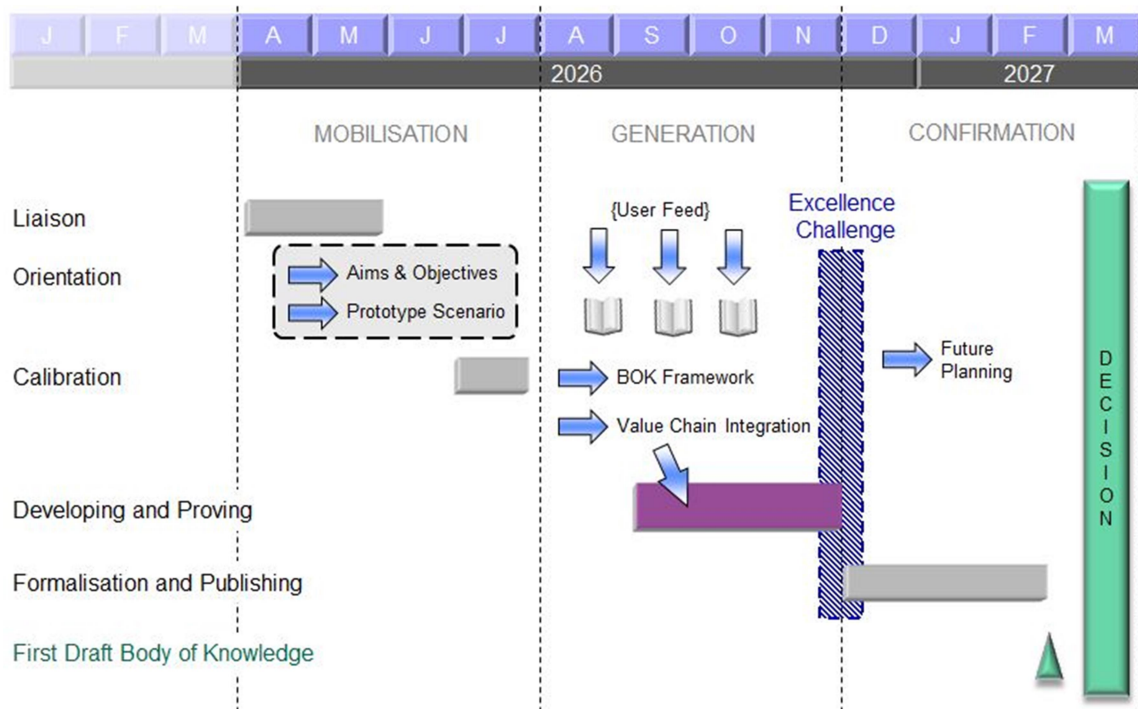
The core of the whole project is **Solution Generation**, in which the PLMIG uses its workshop expertise to produce solutions for the specific problems, issues, and future capabilities that the participants have requested. The documentation and new tools are then **Actioned** within each implementation with PLMIG support.

At the end of the Generation phase there is also a Project-wide review against theoretical best practice, currently defined as the ‘Excellence Challenge’. This generates an objective view of potential future progress, and may also highlight some overlooked issues that could be covered in the final phase.

All of this builds into the first draft of the Body of Knowledge at the end of the programme.

5.2 Knowledge Development

The Knowledge Development stream runs in parallel with User Collaboration.



Mobilisation for the Knowledge Development stream is much less formal, though it still requires **Liaison**, **Orientation** and **Calibration** amongst the participants, who will have vast multi-implementation experience along with proprietary tools and methodologies.

The aim is to get into a common neutral space, and stay there so that the group can apply its high-level perspective to the User Collaboration feed and the Body of Knowledge framework (Section 4.2). Knowledge Development findings are iterated into the User stream to improve the results generation and to maintain a positive feedback cycle.

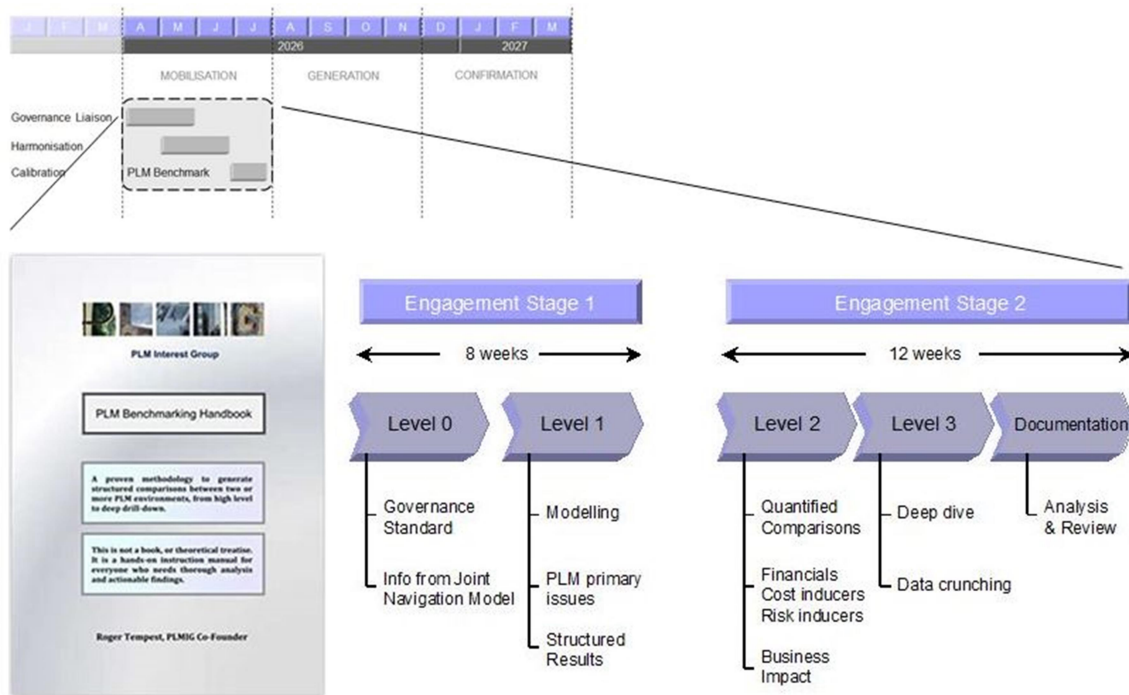
This appraisal and guidance continues through the Generation phase, during which the group also applies its expertise to the Value Chain Integration module within the Senior Management System (Section 7).

Participants combine with the Users for the Excellence Challenge to generate a unified Project viewpoint of the future opportunities for PLM, and then assist with the formalisation of the material that will constitute the first draft Body of Knowledge.

6 STRUCTURED BENCHMARKING

During the first 4 months the User participants liaise and calibrate with each other in order to fully understand each other’s implementation approach and techniques.

This is not a loose conversation but a structured benchmark, designed to generate detailed and factual findings that everyone can learn from.



The PLMIG *PLM Benchmarking Handbook* embodies a proven methodology for running comparative benchmarks, which normally run for an elapsed time of about 20 weeks, with two or three workshops for coaching and for assessment at the respective levels.

This methodology is embedded in the PLM 2025-35 Project, which makes it shorter and much easier to follow. The Project provides the liaison material in increasing levels of detail, and the participant responses build naturally into the results framework.

Every user participant receives the same tools, carries out the same internal analysis, and identifies its areas of focus. The PLMIG manages the harmonisation and calibration, and may run workshops to resolve specific issues requested by the users.

This not only provides high-level evidence of “What other people are doing”, but breaks out into an array of comparisons that each PLM Team can review and apply within their own implementation.

7 SENIOR MANAGEMENT SYSTEM

The PLM 2025-35 Project is set up to produce an internationally-agreed Body of Knowledge for PLM, but being able to access and use that knowledge is only part of the overall context.

Knowing what you should do technically is no use unless you have the skills and expertise within the PLM Team to carry out the work. Even if you work successfully, the implementation will fail if senior management are not fully committed to PLM.

Getting that commitment requires integration of PLM into the business thinking and processes at Board level (in what might be called the 'VP space'). This is particularly difficult if the Board sees PLM as some kind of engineering tool, rather than a business essential. It is made even more difficult by the fact that interactions with the Board tend to be short and infrequent. Everything goes cold in the meantime.

PLM 2025-35 resolves this by applying the Senior Management System, which consistently evolves the upward management elements of PLM over its 12-month timeframe to position PLM in its proper place as a business enhancement discipline.

A key element of this is Value Chain Integration, generated in large part by the Knowledge Development stream using the insights and expertise of the vendor and advisor participants. The aim is not just to extol the benefits of PLM in general terms, but to show clearly, in the context of a particular business, how PLM supports and improves the Value Chain in ways that the Board will want to endorse.

Value Chain Integration is a structured framework that not only declares the top-level benefits but also shows how the web of detailed PLM projects and initiatives fit together to achieve them.

In parallel with this, the respective participants in the User Collaboration stream will be expanding their own upward management and getting specific tools and support from the Project as they receive responses and pushbacks.

The PLMIG integrates these two parallel activities, separating out the specifics (which are confidential to each participant) and documenting the composite knowledge that will then be refined by group feedback.

The result, over 12 months, will be demonstrably greater C-level support for the respective user participants, and a complete pro-forma high-level integration model for PLM that can fast-track the PLM adoption and implementation process.

8 PROFESSIONAL DEVELOPMENT

The 'people' aspects of PLM are often overlooked, but as with all business disciplines they are of fundamental importance. Self-evidently, the business needs sufficient numbers of PLM staff, who collectively possess the correct set of skills, and who are well-trained enough to carry out their roles. They all have careers, and want to develop their expertise and rise through the organisation in the same way as their non-PLM peers.

The PLM 2025-35 Project arose from the *Professional PLM Initiative*, which started in 2017 and which has developed a framework for establishing a recognised Profession for PLM.

That aim is still ongoing, but PLM 2025-35 benefits from it by being able to provide the same principles and methodology for participants within the Project.

The immediate benefits are for the members of each participant team, who not only learn factual comparisons from the Benchmarking, but also can also see for the first time how other PLM Teams are working, and what management techniques they use. This amounts to a de facto training programme without the need to take time off for courses. It captures the power of many minds, and reinforces the sense that PLM is a career that you can progress through.

There are wider benefits for the participants' organisations. With an understanding of the various roles and grades, and a clear layout of the skills matrix, each organisation can resource accurately, hire effectively and plan for future needs. With a new understanding of the benefits of PLM, projects no longer need to be justified on the basis of reduced headcount, which almost always damages the business where it is used as the sole metric.

The PLM 2025-35 Project can therefore be seen as a 12-month personal improvement programme for PLM practitioners in both the User Collaboration and Knowledge Development streams, with corresponding upsides for participating companies.

9 AI WORKING GROUP

A small but very important part of this Project concerns the use of AI in PLM.

AI is widely misunderstood, and its PLM context needs to be made clear. The risk is that it can become a complete distraction from meaningful progress. Current AI is a very specialised application of a tiny technical subset of overall knowledge management - so narrow, in fact, that the computer still doesn't 'know' anything. It just presents some paragraphs of text.

Even this unknowing version of AI has its uses, but it is not what PLM needs. PLM is managed by real, experienced people with a shared understanding, specialised skills and everyday human interaction. Experienced people who understand the business, the marketplace and have aims for the future. The development of a PLM Body of Knowledge is all about genuine knowledge, that stays in place and can be used over and over again.

Some AI will be necessary and useful - not in creating the Knowledge (that comes from User Collaboration): but as a sort of "tour guide" or instructor that shows practitioners where to find the material they need and how to apply it in their live, day-to-day environment.

We need to know exactly what form this should take, and so we will include a Working Group to produce a definitive AI tool for PLM - if such a thing is possible.

The Working Group will define a solution that is better, more accurate, and more constructive. It will answer questions such as what, exactly, do manufacturing companies want from AI? What are the specific requirements of PLM? How do you control the dataset, and what happens when different companies combine their own set with each other or with the Body of Knowledge? How do you check the outputs for accuracy? How do you manage the outputs when they are written into documents which have their own circulation? Which of the available engines is most useful? Can any of the engines be made to work in the way that we need?

The really interesting aspect is that the Working Group will also go further than this. Academic research in the 1990s into Knowledge Management (how to capture what someone knows, so that you keep the knowledge when they leave; and how to think like a human being) was far more advanced than today's offerings. It failed at the time because the 'Rolls-Royce' solution was too difficult to do, but the findings still exist and there are now tools that could achieve 80% of those benefits with 20% of the effort.

There are two streams in PLM 2025-35 (User Collaboration and Knowledge Development) and members of the AI Working Group can come from either of them. Anyone who is part of the Project can opt in. This allows participants to learn about serious AI as the Project unfolds, but mainly it enables the advanced practitioners to combine their expertise within a structured and well-managed framework.

No-one has done this before from a PLM prospective. The results could be ground-breaking for everyone. Over the 12-month period we will either set it up and demonstrate it, or prove that it cannot be done - and if so, spell out the alternative approach that works.

10 PLMIG SUPPORT

10.1 Management

This is a participatory project, designed to run with a minimum of effort and overhead for the participants. The PLMIG provides the tools and the structure; participants receive the material and join in with the actions at each stage, contributing to the findings; and the PLMIG provides the published results.

10.2 Tools

The PLMIG provides all of the tools and working documentation for the project, together with direct support for participants as they are used. In the opening 'Harmonisation' stages these will be for *Self-Assessment* and *Benchmarking*; and in the 'Solution' stages they may include any of the multiple handbooks and manuals that the PLMIG has developed over twenty years.

The PLMIG also sets up and runs the on-line workshops designed to produce the specific problem solutions, and publishes the findings for follow-on use.

10.3 Workshops

There will need to be specific working meetings to investigate and analyse the detailed issues that the user participants want to work on. The PLMIG has extensive experience in running such workshops to produce accurate and useful findings, and the project members who are interested in each particular issue can take part.

10.4 Documentation

In addition to the direct project documentation the PLMIG will produce all of the neutral, 'distilled' documentation for the Knowledge Development team to work on, and will construct the eventual written Body of Knowledge.

Participants in both streams will receive all of the current PLMIG toolsets, and all of the new tools produced during the 12 months of the Project, as part of their Project Membership.

10.5 Coordination

Once the mobilisation phase has been completed, PLM Teams from different organisations will be talking to each other in much more detail than has previously been possible. When PLM practitioners get together in this way they generate their own ideas. It is expected that participants may hold local discussions amongst themselves, as part of the general activity of a community.

This is to be encouraged, subject to confidentiality, and findings or actions from these interactions can be fed back into the centralised coordination if required.

11 HOW TO TAKE PART

PLM 2025-35 is designed to be an informal and flexible project that is easy to be involved with and to benefit from. The Conditions of Participation are therefore minimal:-

1. Membership of the Project commences on receipt of the Membership Fee, and will last until the completion of the 12-month project schedule. The User Collaboration and Knowledge Development streams have the same fee of €8,500 (£7,400, \$10,000).
2. User organisations are eligible to join the User Collaboration stream, and should be willing and able to participate in its activities. The internal discussions of the UC members are confidential, and any documentation published outside the stream will be neutral and non-attributable. The detailed focus of this half of the project will be decided by its members.
3. Organisations of all types are eligible to join the Knowledge Development stream, and to participate in generating the Body of Knowledge. The internal discussions will be confidential, and the published documentation will be in the proposed neutral format.
4. New Members may join at any time by payment of the same fee, and their membership will run until the completion of the 12-month schedule. It is not expected that the Groups will become so large that they cannot function.
5. No specific practical, financial or legal liability is attached to Project Membership.
6. For the first 12 months (as covered by this Proposal) the Body of Knowledge will be entirely in draft form, with the first release at the end of the project period. The PLMIG and the project members will therefore own it collectively while it is under this development. As publisher, the PLMIG will retain the copyright, and make it available to every project member.
7. At the end of the 12 months the PLMIG and project members will decide whether the Project should continue in its current form, and how the Body of Knowledge should be further developed.
8. PLMIG tools and material, and new material produced by Project activity, are confidential to Members. Participants are encouraged to reproduce, modify, or take extracts from any part of it for their internal use. The PLMIG may compile some of the ongoing draft documentation into new tools which will then become available as part of general PLMIG Membership.

Further information can be requested via plm2025-35@plmig.com.