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The 2027 *buying window*

How manufacturers will buy ERP, MES, QMS, PLM, EAM and industrial AI over the next eighteen months, and what software vendors must change in go-to-market to win that demand.

MILESTONES, DEC 2026 TO DEC 2027

11 MILESTONES



DEC 26 JUN 27 DEC 27

EXECUTIVE SUMMARY

A predictable window, *and a crowded one*

Between December 2026 and December 2027, European manufacturers face eleven regulatory and platform milestones that touch their software. Every vendor can read the same calendar. The winners reach accounts early, speak to risk and convert what they book.

THREE FINDINGS

The compliance calendar is the buying calendar

Hard dates create budget, urgency and new stakeholders.

Risk owns the budget

Downtime, liability and cyber exposure travel further than features.

Capacity beats volume

Demand is easy to buy. The capacity to convert it is not.

THE WINDOW IN FOUR NUMBERS

Four numbers *that set the agenda*

39%

of SAP ECC customers had not migrated by late 2024.[1]

2/3

of industrial ransomware victims in 2025 were manufacturers.[2]

11%

of revenue lost to unplanned downtime at the largest firms.[3]

79%

of US manufacturing executives surveyed call the skilled labour shortage their biggest challenge.[4]

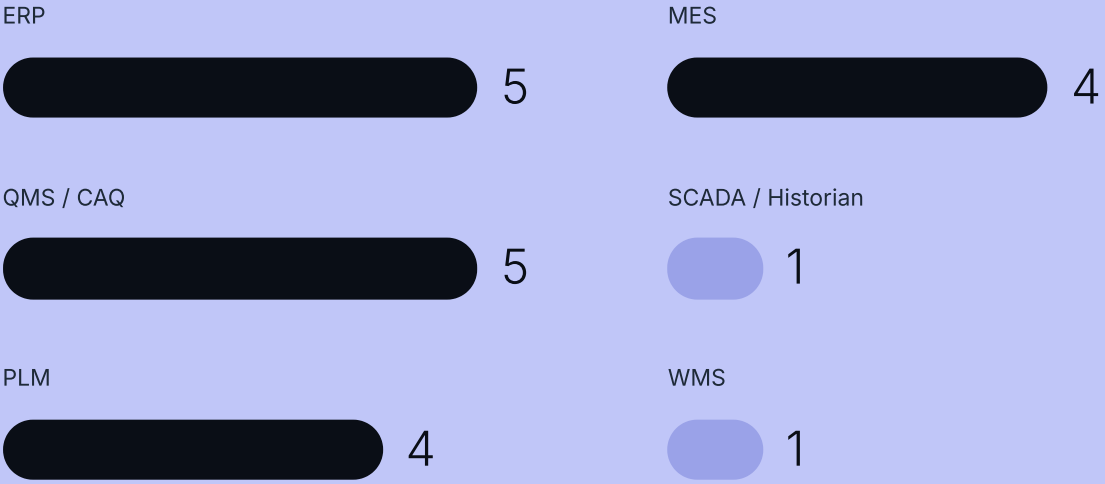
PART 1

The compliance calendar *is the buying calendar*

Eleven milestones in thirteen months. Each one forces a change to a process, a record or a system, and brings a new stakeholder into the decision.



MILESTONES PER SOFTWARE CATEGORY (BASEWAY GTM)



PART 1

Eleven milestones, *December 2026 to December 2027*

9 Dec 2026	Product liability covers software and AI[5]	PLM QMS
1 Jan 2027	Germany: B2B e-invoice issuing[6]	ERP
12 Jan 2027	EU Data Act ends cloud switching fees[7]	ERP MES
20 Jan 2027	EU Machinery Regulation applies[8]	PLM SCADA
18 Feb 2027	Battery passports required[9]	MES PLM
Mid-2027	IATF 16949 second edition (planned)[10]	QMS
9 Jul 2027	eFTI: electronic freight data accepted[11]	WMS ERP
1 Sep 2027	France: SMEs issue e-invoices[12]	ERP
29 Nov 2027	UK moves new cars and vans to Euro 7[13]	QMS MES
11 Dec 2027	Cyber Resilience Act applies in full[14]	PLM QMS
End 2027	SAP ECC mainstream support ends[1]	ERP MES QMS

PART 2 / SIX SHIFTS IN HOW MANUFACTURERS BUY

SHIFT 01 OF 06

The ERP crunch *reopens adjacent decisions*

SAP ECC mainstream support ends in 2027. A clean-core migration forces plants to decide what sits next to the ERP: MES, quality, procurement and maintenance.[1]

SAP ECC customers not yet migrated, late 2024



39%

Migration projects late and over budget



~60%

SAP Cloud ERP Suite revenue growth, Q3 2026

+29%

For vendors: adjacent budgets are set at blueprint stage. Engage when the design is drawn, not when go-live slips.

SHIFT 02 OF 06

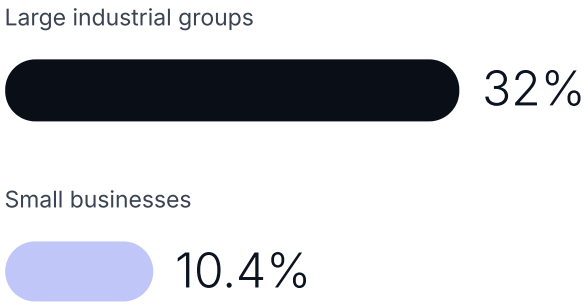
AI moves *inside the platform*

Microsoft and Dassault Systèmes now ship AI agents and companions inside their platforms, and SAP plans to bill its agents by the actions they complete.[18]

24%

of manufacturers expect to use agentic AI within two years, a fourfold rise.[17]

ITALY: AI USED DIRECTLY IN PRODUCTION[19]



For vendors: lead with outcomes, the data foundation and predictable pricing, not "we have AI".

SHIFT 03 OF 06

Risk *owns the budget*

Cyber attacks, liability rules and downtime costs have moved software decisions into the board room. A large car plant loses about $2.3 million per idle hour.[3]

+64%

rise in ransomware attacks on industrial organisations in 2025.[2]

GERMANY: ENTITIES REGULATED UNDER NIS2[15]



Circle area is proportional to the number of entities.

For vendors: quantify avoided downtime, liability and audit exposure, and expect security questions early.

SHIFT 04 OF 06

The knowledge cliff *makes software a workforce tool*

Firms leave 10% to 30% of maintenance roles unfilled as experienced technicians retire.[21]

~50

years: the average age of maintenance technicians, with up to 70% of critical know-how tacit in some sectors.[21]

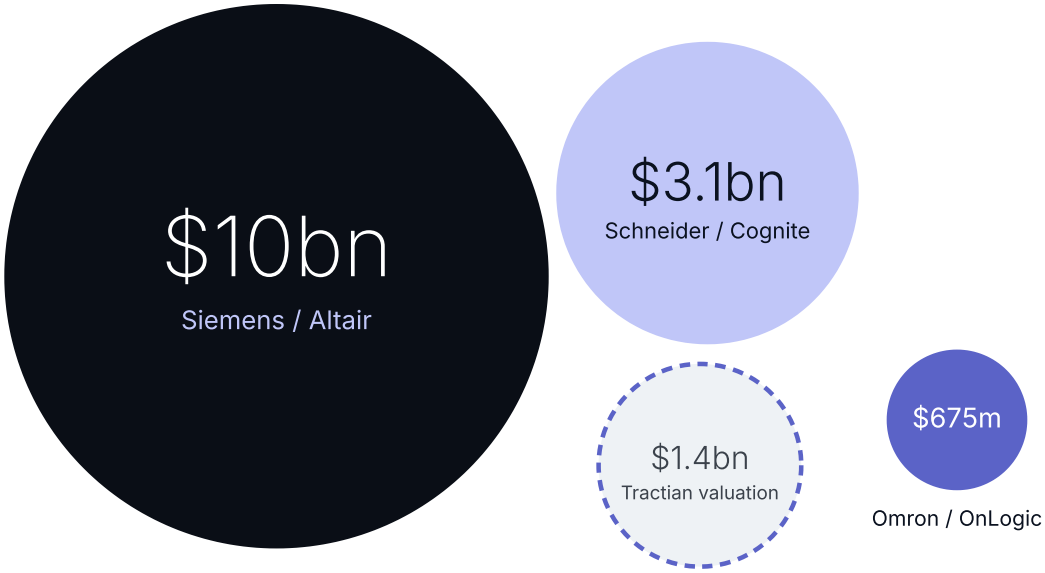


For vendors: sell software as the way to keep output when your best people leave.

SHIFT 05 OF 06

Consolidation *reshapes the field*

Automation and software majors are buying data, simulation and edge capabilities, and Valmet is buying an MES business installed at around 300 sites.[23]



Circle area proportional to value. Dashed: funding round valuation, not a deal.

For vendors: expect "who owns you, and where is your roadmap going?" in every deal.

SHIFT 06 OF 06

Cost and sovereignty *sharpen the business case*

Italian electricity and gas producer prices rose 39% in a year,[24] and 85% of German firms say the country is too dependent on US cloud providers.[25]

GERMAN FIRMS AND CLOUD ERP[25]

Use cloud ERP today



See it as relevant in five years



ITALIAN PRODUCER PRICES, SEP 2026[24]

Electricity and gas



All industry

For vendors: show payback in months and offer deployment choice: sovereign, private or on-premise.

PART 3

Where demand *is forming*

Greenfield sites · Compliance-led · Cost-led

Spain

New EV lines in Zaragoza and Navarra; Indra plans a military vehicle plant in As Pontes.[27]

Portugal

Coloplast's €100m Felgueiras plant, its largest, is now producing.[29]

Italy

Machine tool orders up 10.5% in Q3; 85% of surveyed firms not yet in aerospace and defence plan to enter.[30]

Germany, Austria, Switzerland

NIS2 covers about 30,000 German entities; e-invoicing from January 2027.[31]

Netherlands, Belgium

The Dutch Cybersecurity Act covers more than 8,000 organisations.[32]

United Kingdom

Budget lifts the first-year capital allowance to 50%; 24-hour cyber reporting proposed.[33]

Nordics

Valmet is buying Tieto's MES business.[34]

Poland and CEE

KSeF e-invoicing mandatory since 2026; Poland selected for a PAC-3 MSE maintenance centre.[35]

Southeast Asia

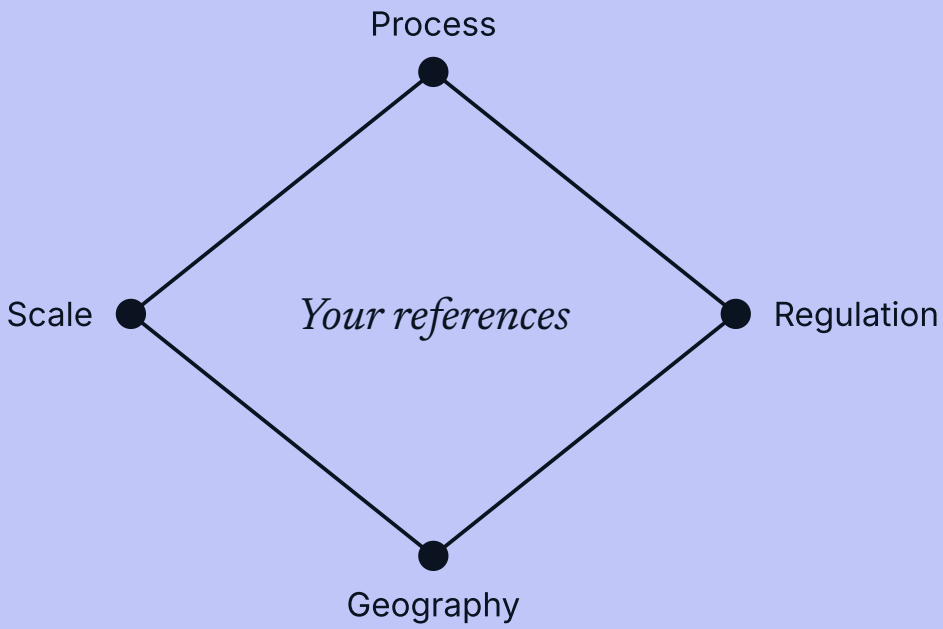
Thai BOI investment applications up 28% to 1.71 trillion baht.[36]

North America

36% of US OEMs reshored or were reshoring in 2026.[37]

WHERE TO EXPAND

Your next market is not the biggest one. *It is the one beside your references.*



Expand where process, regulation, scale and geography let a reference transfer. Sell next door before you sell far away.

PART 4

The 2027 *playbook*

Six moves we use with manufacturing software and automation vendors to turn the window into qualified pipeline.



01 SELL TO THE DATE

Map accounts to deadlines and start six to nine months early.



02 USE SIGNALS, NOT LISTS

New plants, ramp-ups and acquisitions are reasons to call.



03 SPEAK RISK FIRST

Open with the exposure the buyer already owns.



04 MULTI-THREAD

Quality, operations, OT security and finance all decide.



05 SELL NEXT DOOR

Expand where your references transfer.



06 SIZE DEMAND TO CAPACITY

Book only the meetings your team can convert.

BASEWAY

The window is predictable.
Your share of it is not.

Talk to Baseway about a 2027 GTM diagnostic: which deadlines hit your market, which accounts to reach first, and whether your team is ready to convert the demand.

basewaygtm.com

HOW BASEWAY HELPS

- GTM strategy and market entry
- Signal-led prospecting
- Multi-threaded demand generation
- Content and sales enablement

Sources. 1 The Register, Feb 2026; SAP, Feb 2020. 2 Cyber Magazine on Dragos, Feb 2026. 3 Siemens, True Cost of Downtime 2024. 4 Advanced Manufacturing on the CADDi and SME US survey, Jan 2026. 5 Directive (EU) 2024/2853, Art. 22; Covington, Aug 2026. 6 PwC Germany, Oct 2024. 7 cloudmagazin, Jul 2026. 8 SGS, Jun 2025. 9 Krogerus, Aug 2026. 10 IATF SC-2026-005, Jul 2026. 11 European Commission, Jan 2025. 12 Service-Public Entreprendre, Jan 2026. 13 UK Department for Transport, Oct 2026; electrive, Oct 2026. 14 Mondaq / Jones Day, Jul 2026; Pinsent Masons, Aug 2026. 15 AFNOR, Sep 2026; BGBl. I Nr. 301, Dec 2025; Freshfields, Dec 2025; ERP Recycling, Aug 2026. 16 SAP, Oct 2026. 17 Deloitte Insights, Sep 2025. 18 Microsoft Learn, 2026; Dassault Systèmes, Feb 2026; The Register, May 2026. 19 Il Sole 24 Ore, Oct 2026. 20 SecureWorld, Oct 2025. 21 BCG, Nov 2025. 22 Electrical Times on Fluke, May 2026. 23 Machine Design, Mar 2025; SiliconANGLE, Jun 2026; Robotics and Automation News, Oct 2026; Valmet, Oct 2026; Tractian, Oct 2026. 24 Il Sole 24 Ore on Istat, Oct 2026. 25 Bitkom, Jun 2026. 26 The Manufacturer, Oct 2026. 27 electrive; La Tribuna de Automoción; Infobae (EFE); Repsol, Oct 2026. 28 European Commission, Jul 2026. 29 Coloplast; Jornal Económico, Oct 2026. 30 The Machine Maker; Il Sole 24 Ore, Oct 2026. 31 Freshfields; PwC Germany; Schwäbische Zeitung; Semiconductor Today. 32 Forvis Mazars, Aug 2026; VRT NWS, Oct 2026. 33 The Manufacturer, Oct 2026; EY, Dec 2025. 34 Valmet; Evertiq, Oct 2026. 35 Ministry of Finance Poland (KSeF), 2026; Evertiq, Oct 2026. 36 The Star (Xinhua); Evertiq, Oct 2026. 37 Design News, Sep 2026; US FDA, Feb 2026. Circle charts scale area to value. For information only, not legal or tax advice. © Baseway GTM 2026.