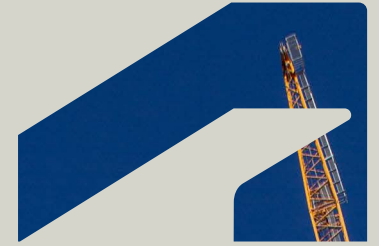




The State of Digital Construction EMEA



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Introduction

Construction technology adoption is accelerating. The opportunity now is to turn that momentum into measurable business value.

Our research across seven EMEA markets shows an industry confident in technology and ambitious about what comes next. Across many of the major technologies we surveyed, respondents expect adoption to roughly double in just the next year.

As that adoption grows, having the right digital strategy becomes increasingly important. It should reflect the needs of your business and the outcomes it wants to achieve, choose the right technology and ensure your organisation is ready to make the most of it.

That readiness matters. While cost and ROI remain important, respondents in our survey rank technical expertise, integration with existing systems and data security as bigger barriers to further adoption.

Our findings also highlight where you can unlock greater value. Managing documents and data is one of the industry's top improvement priorities, reinforcing the importance of connected, well-managed information.

But technology also needs to work for the people using it. Our research reveals a critical gap between those making technology decisions and those using the tools on the ground.

Closing that gap involves a clear opportunity for construction leaders to create a digital strategy that works across the enterprise and right through to project delivery. Connecting people and data enables more consistent, connected ways of working across the project ecosystem.

That means making it easier to apply successful approaches across projects. By aligning your organisation in this way, you can deliver value against today's priorities while building foundations that can support what comes next.

**Amit Puri, Head of Technical Solutions,
EMEA Autodesk Construction**



About this research

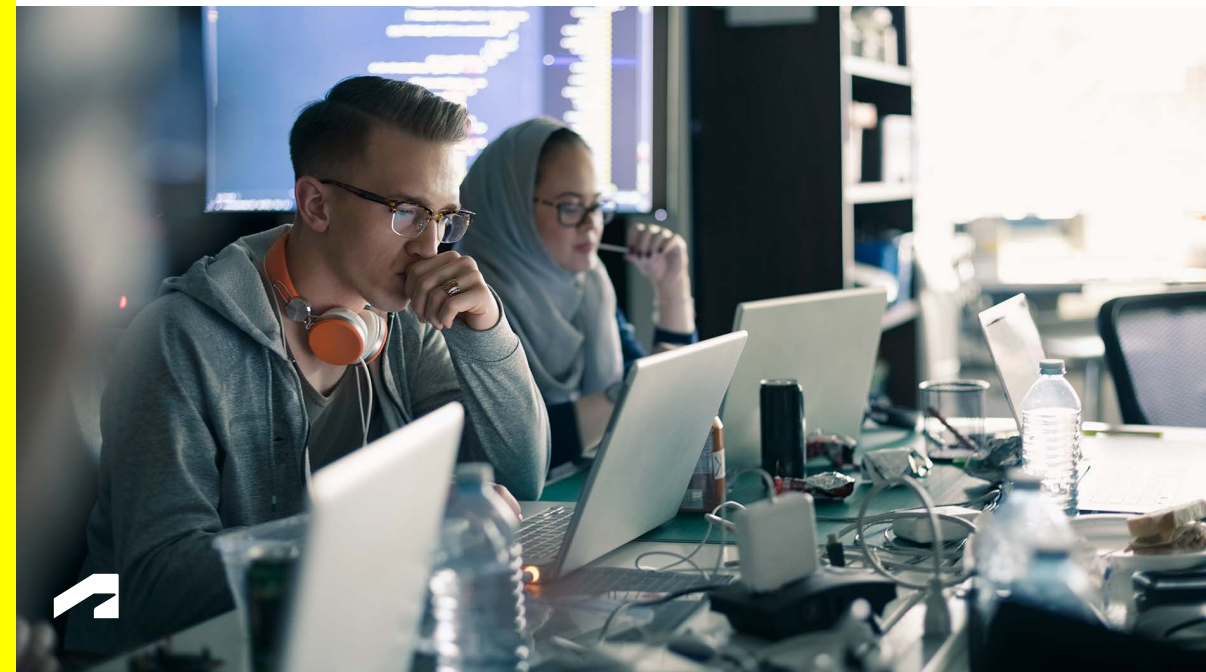
This research spans the UK, Ireland, Germany, the Netherlands, Sweden and the Middle East (specifically the UAE and Saudi Arabia), with 250 people surveyed in each of those six markets.



From a cohort of chief technology officers and project directors to construction managers, planners, engineers and digital transformation specialists, experts from across the region shared their views on the solutions they use, their core priorities and much more.

They were evenly drawn from mid-size (1,000 to 4,999 employees) and large (5,000+ employees) companies.

Taken together, their responses provide an invaluable picture of how construction businesses in EMEA can realise the true power of connected data, documents and workflows.



01

Key findings





01

Tech is now integral to construction

02

Adoption is about to accelerate

03

The leadership perspective gap

04

Real integration is the next step

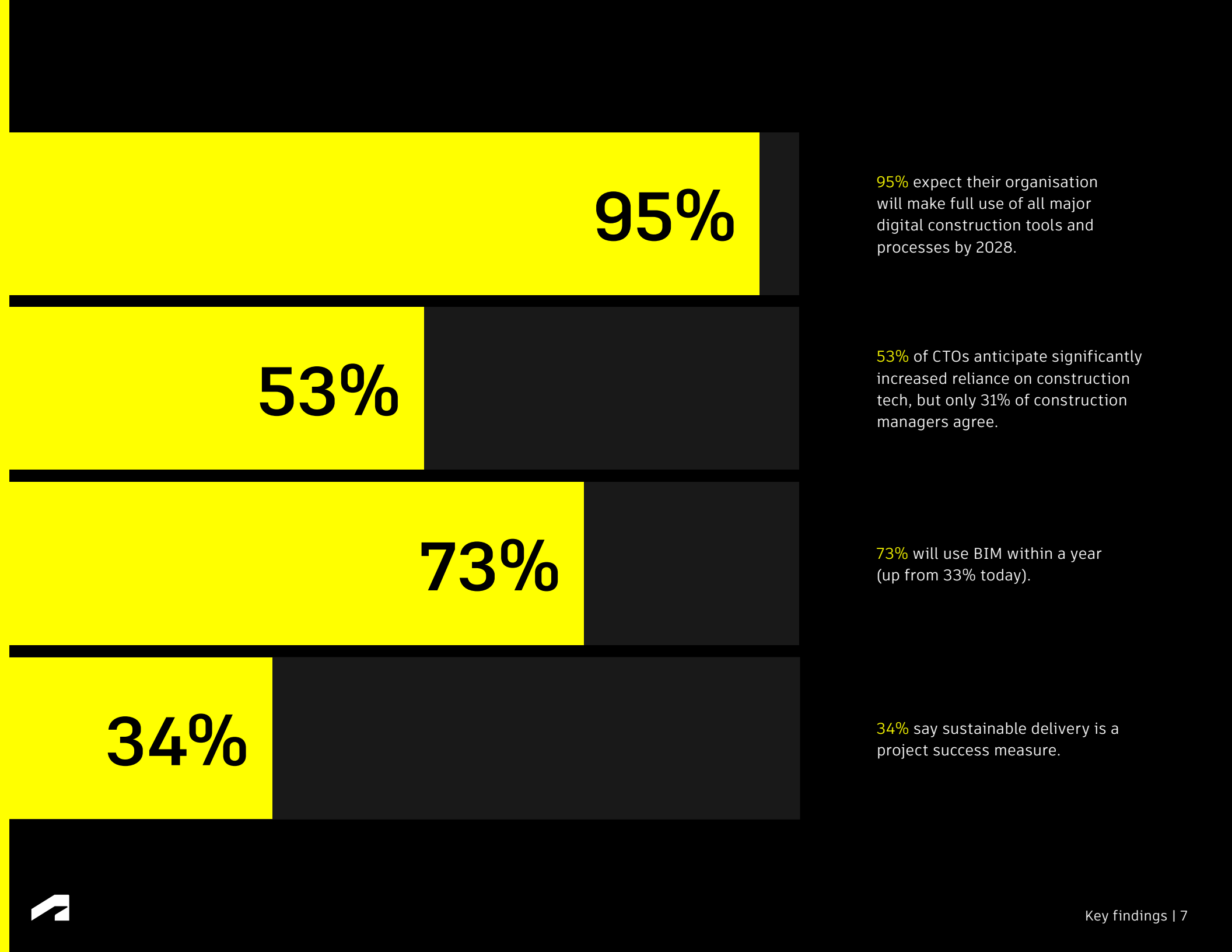
05

The barrier is readiness, not cost

06

Sustainability central to success



A horizontal bar chart with four rows. Each row consists of a yellow bar on the left and a dark grey bar on the right. The yellow bars contain the percentages 95%, 53%, 73%, and 34% respectively. To the right of each bar is a text block explaining the statistic.

95%

95% expect their organisation will make full use of all major digital construction tools and processes by 2028.

53%

53% of CTOs anticipate significantly increased reliance on construction tech, but only 31% of construction managers agree.

73%

73% will use BIM within a year (up from 33% today).

34%

34% say sustainable delivery is a project success measure.



UK

40% measure project success by stakeholder satisfaction

Ireland

43% say BIM capabilities are most critical for project success

Germany

58% expect significantly increased reliance on construction technology

Netherlands

28% prioritise reduced project completion time when evaluating software value

Sweden

46% expect to adopt BIM in the next year

UAE/KSA

38% want better mobile access, against 22% in the UK



02

Tech is now integral to construction



Construction has raced to embrace platform tech in recent years. It's now business-critical, bringing proven value across asset and project lifecycles – 91% of those surveyed are likely to recommend the software they use.

Beyond enabling operations, technology is becoming key to decision-making. In fact, digital capability is influencing how projects are delivered: innovation and use of technology was the most cited measure of project success (chosen by 35%).

While 89% are satisfied their supply chain can share information seamlessly across projects, only 39% are very satisfied and larger firms are less likely to be satisfied.

As project ecosystems grow, so do the number of communication and collaboration interfaces. That creates opportunities for information to become fragmented, siloed or difficult to access.



Truly realising the value of integrated information flows means taking action on the insights the data delivers to optimise processes, build skills and fundamentally reshape how teams and contractors work together.

Satisfaction varies depending on company size

Larger firms with 5,000+ employees are markedly more enthusiastic about construction management software: 52% are extremely likely to recommend it and 35% say the software they use exceeds their goals, compared with 40% and 28% of mid-size firms, respectively.

And while mid-size firms measure success by innovation (37%) and on-time delivery (36%), the largest rate it by quality of the finished project (38%) and stakeholder satisfaction (35%). That makes sense: quality issues on complex projects can make or break the reputations of larger firms.



INDUSTRY SNAPSHOT:

VolkerWessels, Port of Rotterdam

Forma (formerly ACC) was the digital backbone of VolkerWessels' infrastructure project at the Port of Rotterdam. VolkerRail used it to create a consistent, transparent process for flagging and resolving issues across disciplines and phases.

- Reporting effort cut by up to 80%
- Issue turnaround times improved by 60%
- Digital-first workflows and standardisation key to success



03

Adoption is about to accelerate

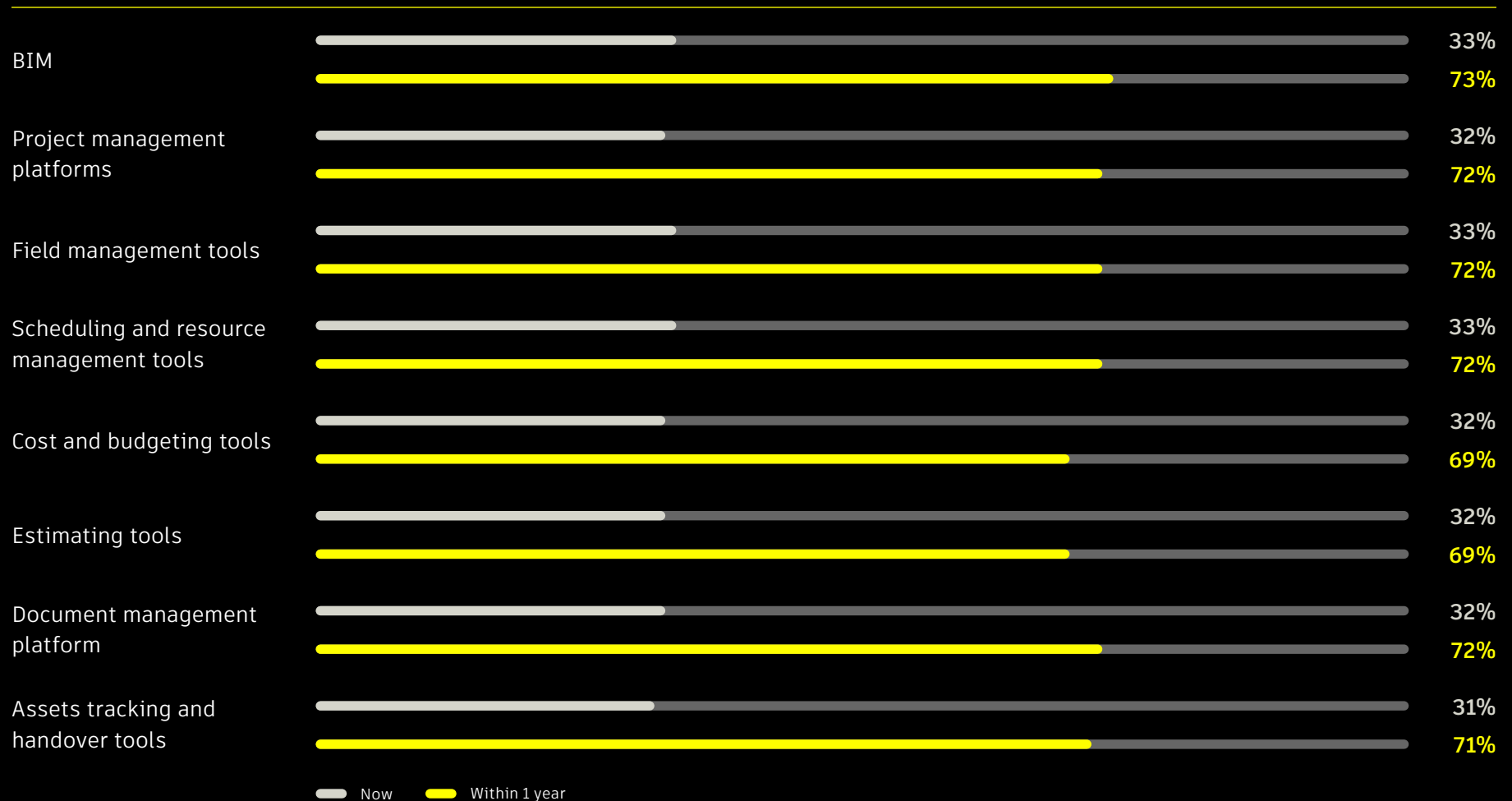


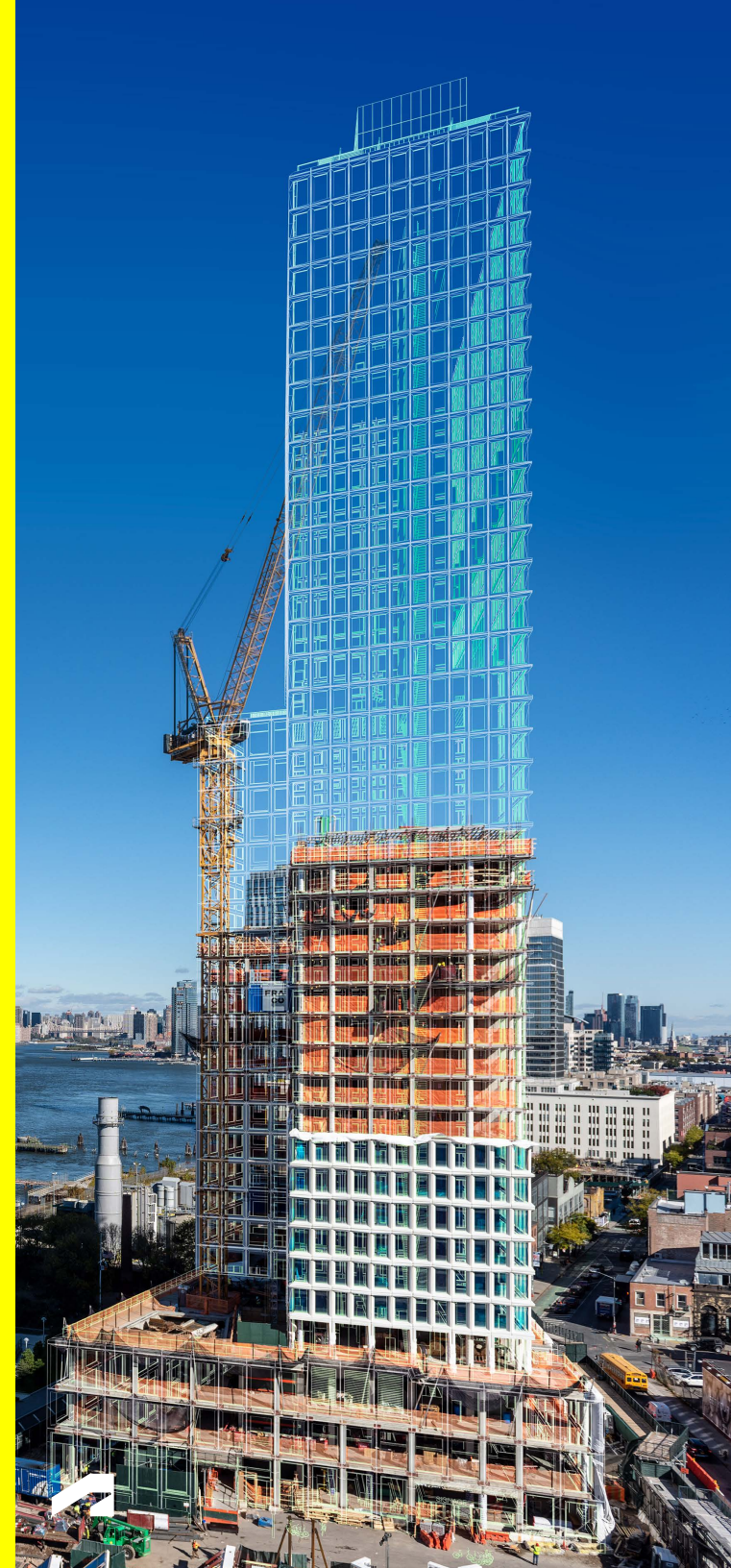
With such high confidence in construction management software, firms are set to move beyond isolated or initial tech adoption to build their digital tech stacks, with adoption expected to skyrocket in the next year.

By 2028, almost everyone (95%+) we surveyed expects their organisation will make full use of all major digital construction capabilities and processes.

While BIM has become the industry benchmark, many organisations have yet to fully implement it. That's set to change, with BIM adoption set to leap from a third to three-quarters of the industry in the next year.

Tech adoption 2026 - 2027





Adoption more likely for largest firms

Larger firms are ahead on tech adoption, while mid-sized firms tend to lag. BIM processes are an entry point, with mid-sized firms being more likely to call BIM their most critical digital capability – 42% say so, compared with 37% of larger firms.

Digital capability adoption

	Larger firms (5,000+ employees)	Mid-size firms (1,000-4,999 employees)
Assets tracking	36%	26%
Scheduling	37%	29%
Estimating	35%	28%
Document management	35%	28%

Project mandates driving adoption wave

With ever-more complex project requirements in play, digital capabilities help construction firms meet client needs and offer greater visibility into project progress.

At the same time, project owners increasingly specify exact software or technology for project teams.

On BIM-enabled projects, this can be in the Employer's Information Requirements (EIR), helping establish how information is created, managed, exchanged and delivered across the project ecosystem.



INDUSTRY SNAPSHOT:

BAM, NCH

Tasked with building a state-of-the-art hospital including 6,500 rooms and 22 operating theatres, BAM adopted the latest BIM platform technology, culminating in a world-class facility with a data-rich digital twin.

- Forma common data environment for 100+ subcontractors
- QR-tagged assets map to digital twin
- Client set to have complete digital record on handover



A woman and a man, both wearing hard hats and high-visibility safety vests, are standing in a large industrial warehouse. The woman is holding a tablet and pointing at the screen, while the man looks on. They are both wearing safety glasses and work boots. The warehouse has a high ceiling with exposed steel beams and corrugated metal siding. In the background, there are orange traffic cones and a white pickup truck parked near a loading dock. The lighting is bright, suggesting daytime.

04

The leadership perspective gap



Having ramped up their capabilities, the next challenge for the C-suite in construction is turning leadership confidence in technology into value in the field. Our research found those specifying software rate it much higher than those using it at the coalface.

For example, 43% of project directors and 35% of CTOs say their construction tech capabilities exceed their organisation's goals, but only 23% of construction managers and 24% of directors of construction agree. Construction managers are also notably less likely than CTOs to recommend software and expect to rely on it more.

Differing perspectives for CTOs and Construction Managers

	CTO	Construction Manager
Extremely likely to recommend current construction management software	36%	33%
Very satisfied with ability to share information seamlessly across projects	44%	31%
Anticipate significantly increased reliance on construction technology	53%	31%

Naturally, goals differ at executive level and on-site. While leaders focus on developing strategic plans and directing their implementation, teams in the field want to improve how the tech they use supports day-to-day workflows and project delivery.



Barriers to adoption for CTOs and Construction Managers

	CTO	Construction Manager
Lack of internal expertise	31%	22%
Integration with existing systems	28%	29%
Time (to search, evaluate, integrate & onboard)	30%	19%
Data security and privacy concerns	31%	20%

Asked about their future wish list, CTOs are especially interested in AI-driven predictive planning software, while those on the ground rank integrated collaboration capabilities more highly.

Folding on-the-ground insight into strategic planning can help drive value through improved integration, while improved internal communications and skills-building can support organisational readiness for tech adoption.



INDUSTRY SNAPSHOT:

Careys

To enable a firmwide transition to Autodesk Forma, Careys built a network of digital champions from across the business. They led decision-making on new document management processes and trained their teams, transforming reporting and paper use.

- Streamlined 320 forms to 70 digital forms
- Saved 7,500 hours in just over a year
- Reduced non-conformance reports and safety issues

05

Real integration is the next step



Giving the company and the overall project supply chain the ability to connect seamlessly isn't enough. The most successful construction tech adopters focus on organising and making use of their data, giving them stronger insights for decision-making and powering more effective collaboration.

Our research shows a growing need for a more connected data environment. Only 40% of those we polled say they're very satisfied with project information flow, so it tracks that managing documents and data is the top single improvement priority (cited by 16.4%).



Priority areas for improvement over the next year

Managing documents and data	16%
Design coordination and rework	14%
Handover and asset information	13%
Cost overruns / claims	12%
Schedule delays	12%
No area in construction management	11%
Site - office disconnect	11%
Low BIM adoption on site	9%



Meanwhile, robust reporting is the top requested feature (31%) and electronic document management systems are among the capabilities most likely to be adopted in the next year.

As projects become more complex and technology estates expand, the value of digital construction will increasingly depend on how effectively organisations can break down silos and bring together documents, data and workflows.

Critically, having a common data environment is only one of the first steps. Your data must be captured and organised in such a way that you can make proper use of it and benefit from data-driven decision-making.



INDUSTRY SNAPSHOT:

KEO International Consultants

Leading Middle East multidisciplinary consulting firm KEO has fully embraced Forma (formerly ACC) as the foundation of its digital strategy. After a seamless integration, KEO has also streamlined how it manages 150 projects and makes data-led decisions.

- Cut the volume of email by 70%
- Less rework
- Improved stakeholder collaboration across 250+ organisations



06

The barrier
is readiness,
not cost





The industry knows digital platforms provide long-term value, but barriers to adoption remain. Surprisingly, it's not about cost. Instead, the market challenge revolves primarily around organisational readiness.

The biggest barriers preventing organisations from adopting more digital construction management solutions include:

- A lack of internal technical expertise (29%)
- Integration challenges with existing systems (29%)
- Data security and privacy concerns (28%)

Less than a quarter of respondents (24%) cited cost of software or limited proven ROI as a barrier, sitting below capability and integration issues. Only 0.7% report no barriers at all.

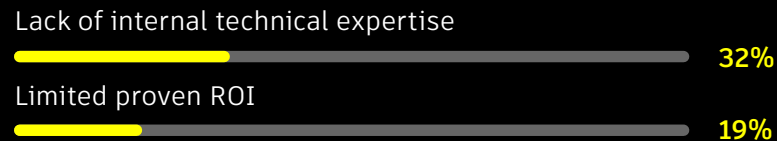
Understanding local nuance

Barriers to entry vary by market. Resistance to change from employees is the greatest barrier to adoption in some markets, but the least challenging issue in others. The same is true for cost.

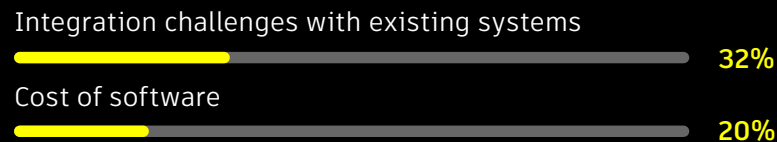
Those trying to drive change need to understand exactly what stands in their way.

Cultural factors: barriers in different markets

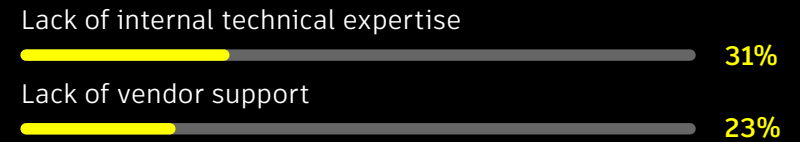
UK



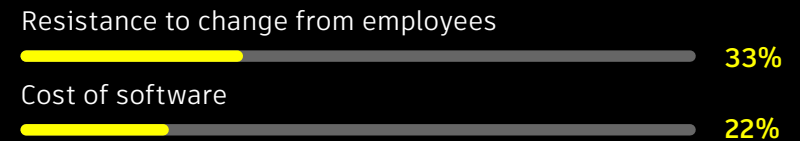
Ireland



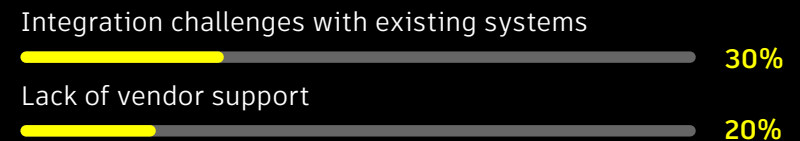
UAE/KSA



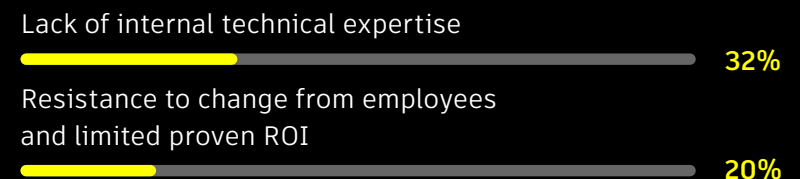
Germany

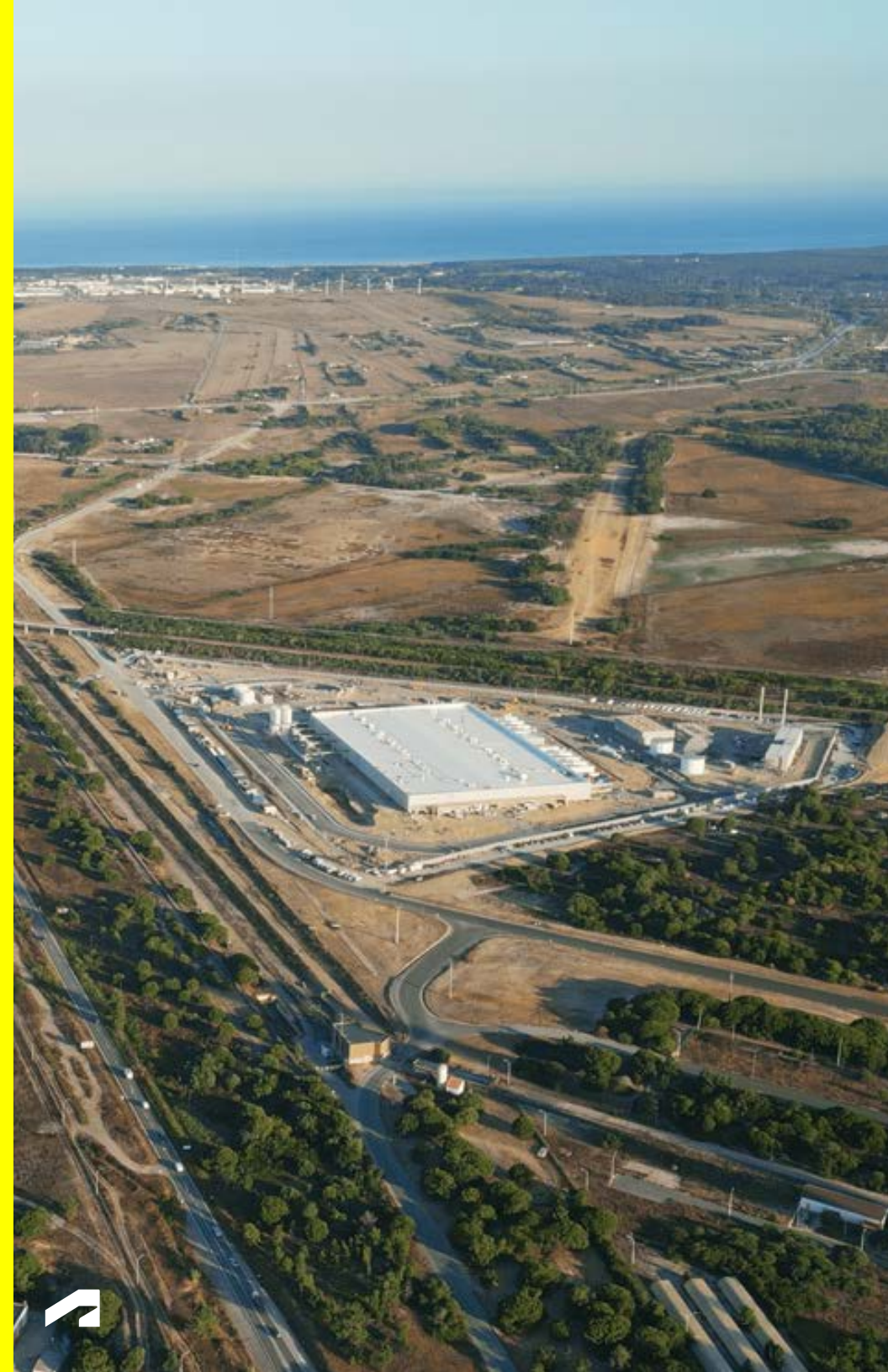


Netherlands



Sweden





INDUSTRY SNAPSHOT:

Start Campus

Headquartered in Lisbon, Start Campus designs, builds and operates large-scale, sustainable data centre infrastructure, relying on Autodesk Forma to realise its ambition. They used it to create a centralised, reliable source of truth and standardised workflows for teams and subcontractors.

- Invested in training for all stakeholders, including contractors
- Onboarding further contractors took 75% less time
- Improved co-ordination and reduced risk



07

Sustainability as a benchmark of success



Sustainability remains firmly embedded in how businesses measure and define project success – even as the policy environment continues to evolve.

Our EMEA-wide survey found sustainable delivery is a project success measure for 34% – level with budget, finished quality, stakeholder satisfaction, and innovation and use of tech.

It's clear sustainability is becoming an operational priority in its own right rather than an enforced response to regulation. Nearly a third (31%) of construction firms say sustainability and green construction technologies will have the most impact on their industry in the next three years.

That means sustainability ranks as highly as AI in terms of the emerging trends that matter most.

It's no surprise – an approach anchored in sustainability often delivers efficiencies. In fact, 98% of respondents said integrating construction management software with sustainability practices has helped their organisation to achieve its project goals, with 49% saying it's very important.



INDUSTRY SNAPSHOT:

SSEN Transmission

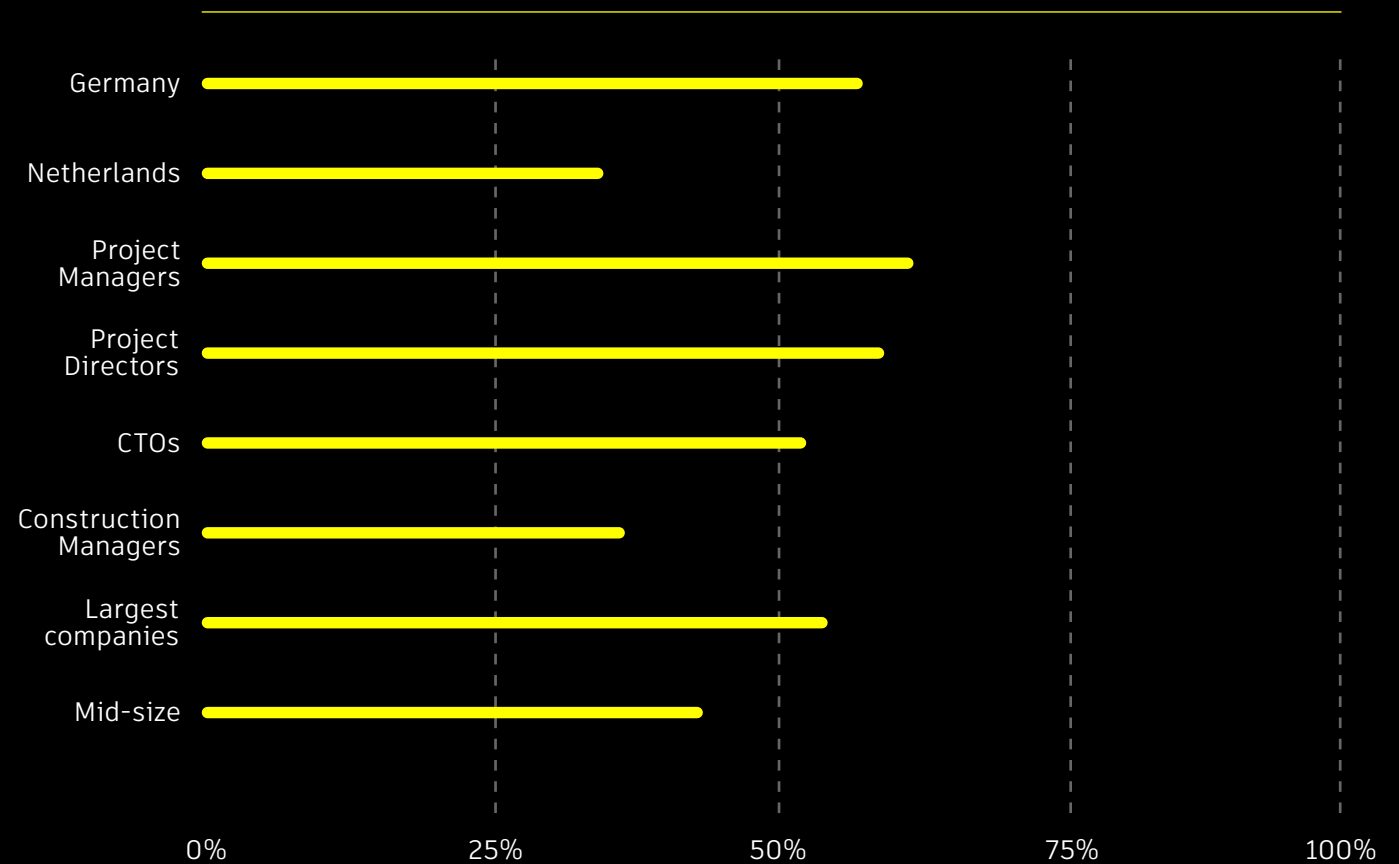
As SSEN Transmission seeks to achieve ambitious Net Zero goals with multi-billion pound energy infrastructure upgrades in Scotland, it has used Autodesk Forma to enable it to scale its operations efficiently and easily.

- Reduced waste and calculated environmental impact with live data updates
- Freed up 20% more time to spend on-site and halved follow-up time after meetings
- 88% of employees say document and design management has improved





How many say the software-sustainability link is very important?



Moreover, the construction industry is under pressure in the EU and elsewhere to deliver and meet sustainability and net zero targets.

That picture is more nuanced in the UK, where recent procurement reforms are shifting the emphasis of social value towards jobs, skills and economic impact.



08

Market snapshots





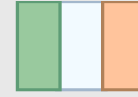
UK: Focused on stakeholder satisfaction

- 56% are extremely likely to recommend their current software, second only to Germany
- 47% are very satisfied with information flow across their supply chain
- 32% say lack of internal expertise blocks tech adoption

UK firms are more likely than any other market to measure success by stakeholder satisfaction (40%, against 34% overall and only 30% in some markets) and least likely to measure it by the quality of the finished project (28%, against 40% in Germany).

At the same time, it is the market least likely to want better collaboration capabilities (9%) and most likely to say nothing at all would be important for the future of construction management software in their organisation (16%).

Only 5% name schedule delays as their top improvement priority, against 12% overall. Instead, priorities for UK-based respondents are managing documents and data, and handover and asset information. That ties into their focus on stakeholders.



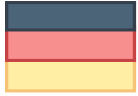
Ireland: Keen on data and collaboration

- 43% say BIM technology is most critical for project success
- 20% want better collaboration solutions between teams and stakeholders, more than any other market
- 17% want to improve how they manage documents and data in the next year

Ireland reports the strongest information flow of any market: 96% are satisfied with their supply chain's ability to share information seamlessly.

Irish firms are focused on what data delivers, with 40% citing improved data quality and insights when evaluating software value, well ahead of the 29% average. Innovation and tech use also came top of the list of success factors here (35%)

Cost is their lowest barrier to adopting construction tech in general (20%), but one of the highest along with project duration when it comes to the factors influencing their choice of software.



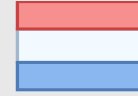
Germany: Confident but cultural barriers persist

- 58% expect significantly increased reliance on construction technology
- 58% say integration with sustainability practices is very important
- 33% cite resistance to change from employees as a barrier to adopting more digital tech

Germany is the most confident and satisfied EMEA market of those surveyed – nearly three in five (58%) are extremely likely to recommend their current software. And only 8% say the solution they use merely partially meets goals, less than half the average.

But cultural and commercial barriers to tech adoption remain: 33% cite resistance to change from employees, the highest of any market and compared with 20% in Sweden. Similarly, 30% cite limited proven ROI. Only 22% pointed to cost.

The human factor arises again when choosing software – German firms weigh vendor support and customer service more heavily than any other market at 36%, against 24% in Sweden.



Netherlands: Focused on efficiency and cost

- 30% say their software only partially meets their goals – the highest of any market
- 28% cite reduced project completion time when evaluating software value
- 24% are very satisfied with how their supply chain shares information, against 40% overall

When choosing construction management software, Dutch respondents value the potential time saved above any other factor. And when evaluating project success, they focus on keeping to the budget above anything else (36%). Time is money, and money talks in this well-developed market.

Looking ahead, Dutch firms are also keen to drive operational efficiency – they're most interested in customising workflows (30%). And along with Sweden, they're most likely to expect AI to influence the construction industry (34%).

Dutch firms also set the highest bar in our research. They are the most reserved market on almost every measure of enthusiasm, yet virtually none report dissatisfaction.



Sweden: Steady and determined growth

- 46% expect to adopt BIM in the next year
- 32% cite a lack of internal technical expertise as a barrier
- 57% say their solution fully meets goals, while just 23% say they exceed them

This is a market on the cusp. While our research found their current adoption of construction tech solutions sits at or below average across most categories, their intent to adopt soon runs higher than elsewhere.

Sweden has the lowest current use of cost and budgeting software (26%, against 38% in the UK) and the highest intention to adopt them (43%). It's a similar story for BIM.

Upskilling could also be a priority here, as capability is proving a bigger obstacle than other factors such as cost. Swedish respondents were more likely (32%) than any other to name a shortage of internal technical expertise as the factor holding it back.



UAE/KSA: Fast-growing, BIM-enabled and focused on field solutions for UAE

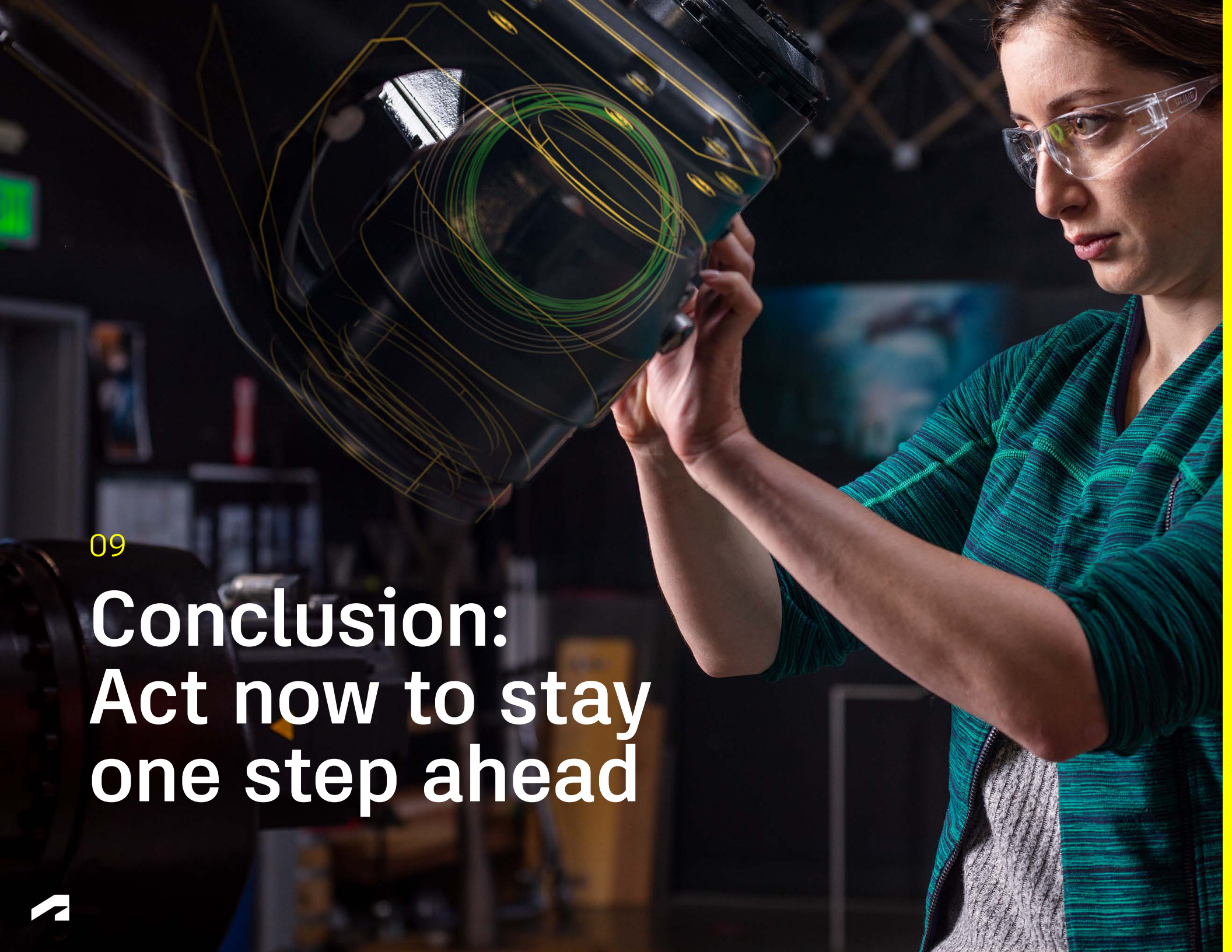
- 40% already use BIM – the highest current adoption of any market
- 38% want better mobile access, against 22% in the UK
- 30% cite cost of software as a barrier, the highest of any market

Firms we surveyed in the Gulf report higher use of BIM, field management, scheduling and estimating capabilities than other EMEA markets we surveyed, and near-universal expectation that reliance on construction technology will grow – 98%, above the EMEA average.

Cost is a real constraint, however. No other market cites the price of software as a barrier more often.

Demand for better mobile access (38%) also runs far ahead of anywhere else in our survey – the figure is 22% in the UK, for example. At the same time, this market rates field management solutions higher than any other (44%). Both points likely reflect the market being more focused on live project delivery than back-office reporting.



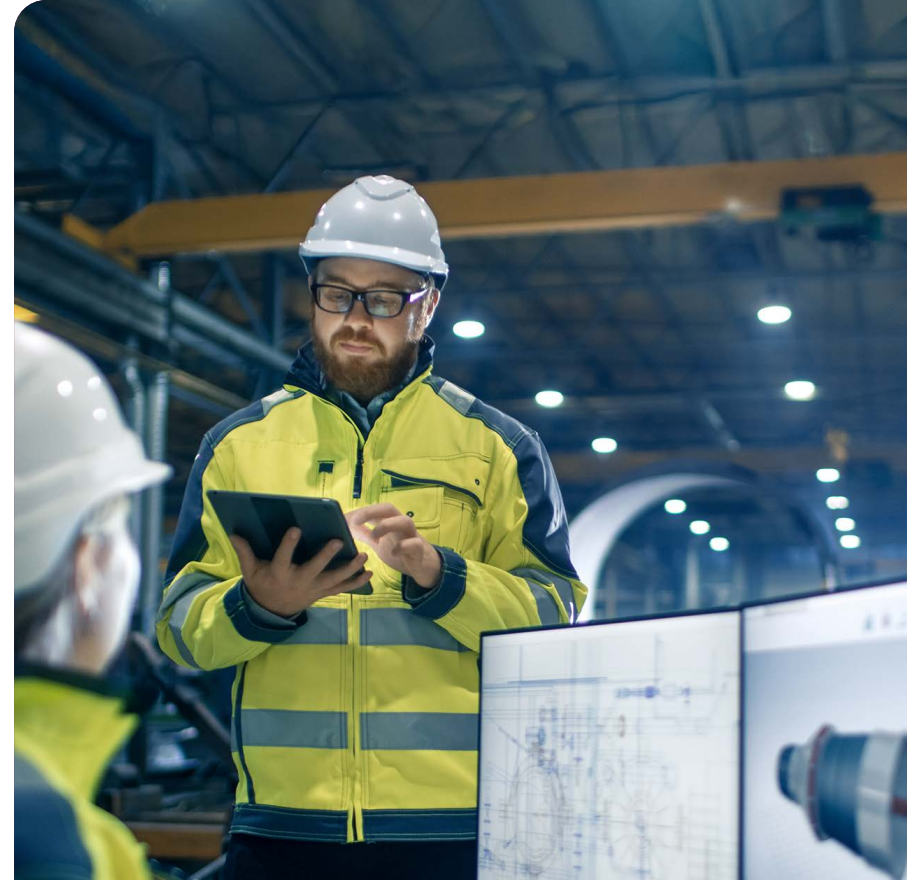
A woman with brown hair, wearing clear safety glasses and a green long-sleeved shirt, is focused on a large, dark, curved object. She is holding it with both hands. The object has several yellow and green lines overlaid on it, suggesting a technical or scientific context. The background is dark and out of focus, with some industrial equipment visible.

09

**Conclusion:
Act now to stay
one step ahead**



Construction tech adoption is strong across EMEA, but set to accelerate further in the next one to three years. Respondents across the region are keen to make more use of everything from AI and automation to digital twins and blockchain.



What does that mean for construction leaders? Firms across the region are clear these platforms help them deliver results. The real opportunity lies in turning adoption into measurable value through better end-to-end integration across systems and supply chains, along with sharper skills and optimised organisational readiness.

This research points to three clear priorities for construction leaders.

Start with documents and data. This is the single area firms most want to improve over the next year, ahead of design coordination, handover, cost and schedule. Better information management creates the foundation for more connected workflows, stronger visibility and better decision-making across projects.

Ask your people on the ground. Executives consistently rate construction tech solutions more highly than the site-level managers using them day to day. Understanding gaps and blockers on the ground can shape procurement and planning, and prevent adoption challenges down the line.

Budget for capability. The most-cited barriers across EMEA are a shortage of internal technical expertise and integration difficulties. Forward-thinking construction leaders are ensuring they invest in skills and in maximising how they integrate software to automate workflows, provide visibility and enable collaboration.

Data and document management, project-level input and organisational capability all form part of the right digital strategy. The critical factor is ensuring strategy translates from the enterprise into project delivery.

The construction firms set to thrive most in the coming years are those that not only accelerate tech adoption now in line with the industry, but turn that momentum into measurable value this year and over time. Building strong foundations matters, but they need to evolve with what comes next.





Autodesk Forma is redefining how AECO teams design and make—bringing architects, engineers, and construction professionals together in one seamless, end-to-end experience. By enabling connected data flow across the entire project lifecycle, Forma eliminates silos and fosters true collaboration.

From early design decisions to on-site execution, teams work smarter with AI-native insights that power better decisions, greater agility, and stronger outcomes. It's not just about better tools—breaking barriers and delivering projects smarter, faster, and with confidence.

For more information visit:

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