ONSIGHT PROJECTION REPORT 2026

THE STATE OF DATA, AI & DIGITAL TRANSFORMATION IN CONSTRUCTION

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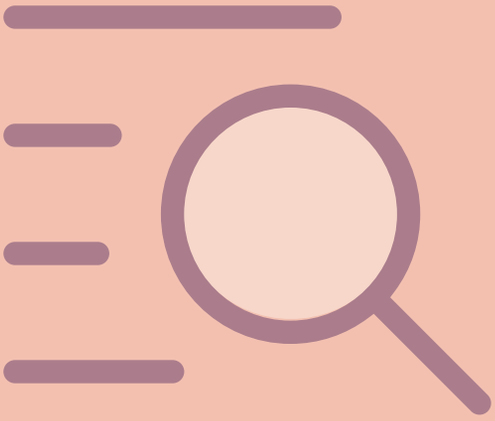


The ONSIGHT Projection 2026 survey captures the perspectives of 100 BIM managers, VDC leads, and construction professionals across Europe.

The findings reveal an industry in transition - neither fully analog nor truly digital - grappling with foundational challenges while looking toward an AI-enabled future.

WHO RESPONDED

The survey collected responses between November 2025 and January 2026.

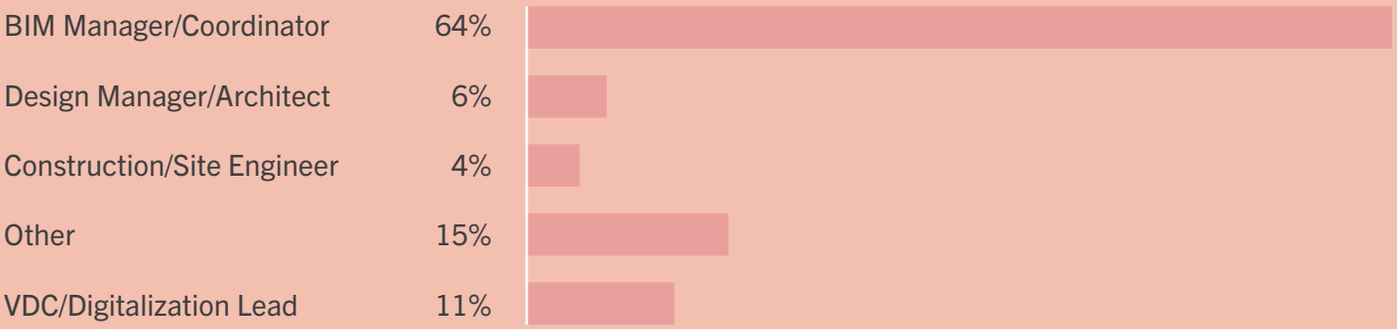
The respondent profile skews toward BIM specialists and VDC leads - professionals who sit at the intersection of technology and project delivery.

Geographic representation spans 19 countries, with Nordic nations forming the core: Denmark (28%), Germany (12%), Sweden (8%) and Norway (6%). Netherlands (10%), Switzerland (6%), Austria (5%), Italy and France (4%) provide continental European perspectives.

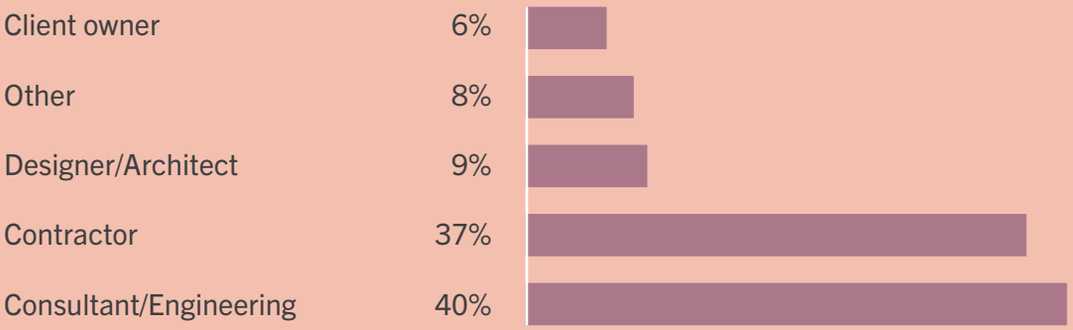
Project budgets distribute broadly:
23% work on mega-projects (€500M+) and
48% on projects between €10M and €500M.

This range ensures insights reflect both complex, large-scale implementations and typical mid-market realities.

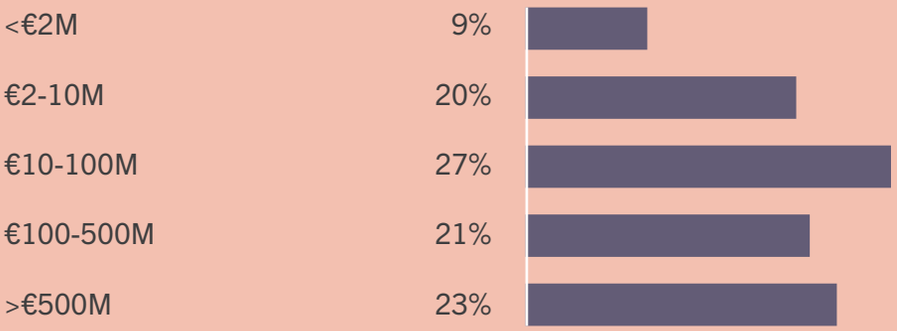
RESPONDENTS BY ROLE



BY ORGANIZATION TYPE



BY PROJECT BUDGET



KEY TAKEAWAYS

THE INDUSTRY IS IN BETWEEN
These survey results paint a picture of an industry in transition: no longer analog, not yet truly digital. Most professionals use BIM tools daily, but data confidence hovers around 6.7/10.

AI is everywhere in the marketing but tentative in the projects. Advanced capabilities are technically feasible but organizationally challenging.

INTEGRATION BEFORE INNOVATION
The survey reveals a clear priority: fix the foundations before building the penthouse.

Professionals want data integration, system interoperability, and reliable workflows more than they want AI, automation, or advanced analytics. Advanced capabilities built on shaky foundations deliver disappointing results.

The industry has learned this lesson repeatedly and is now prioritizing getting the basics right.

THE PEOPLE PROBLEM PERSISTS

Many of the biggest challenges aren't technical but actually human. Resistance to digital workflows, lack of skills, cultural barriers, and misaligned incentives appear throughout the responses.

Technology vendors have largely solved the technical problems; the industry now faces the harder work of organizational change.

PRAGMATIC OPTIMISM

Despite the challenges, a thread of pragmatic optimism runs through the responses. Professionals believe real-time sync will be standard by 2027.

They think automated progress tracking will become commonplace. They prioritize improvement over maintenance of the status quo.

The construction industry isn't waiting for a revolution. It is working through an evolution, one integration at a time, one standard at a time, one project at a time.

“WE HAVE COME A LONG WAY THE LAST COUPLE OF YEARS WITH STANDARDIZATION OF OUR DATA, BUT IT CAN ALWAYS GET BETTER”

BIM Manager, Norway

01

THE STATE OF DATA CONFIDENCE

01 THE STATE OF DATA CONFIDENCE

6.7/10
AVERAGE CONFIDENCE IN DATA CONSISTENCY

THE CONSTRUCTION INDUSTRY'S RELATIONSHIP WITH ITS DATA IS COMPLICATED.

When asked how confident they were that their project data - properties, quantities, parameters - remained consistent across systems, the average score landed at 6.7 out of 10.
Not catastrophic, but hardly reassuring.

CROSS-ANALYSIS:
WHERE CONFIDENCE BREAKS DOWN
The data reveals stark differences across project types. Metro and railway projects report the lowest confidence at 5.2/10 - likely reflecting the complexity of infrastructure coordination.

"WORKING WITH DATA IS NOT STANDARDISED AND THEREFORE VERY COMPLEX."
VDC Lead (confidence: 4/10), Germany

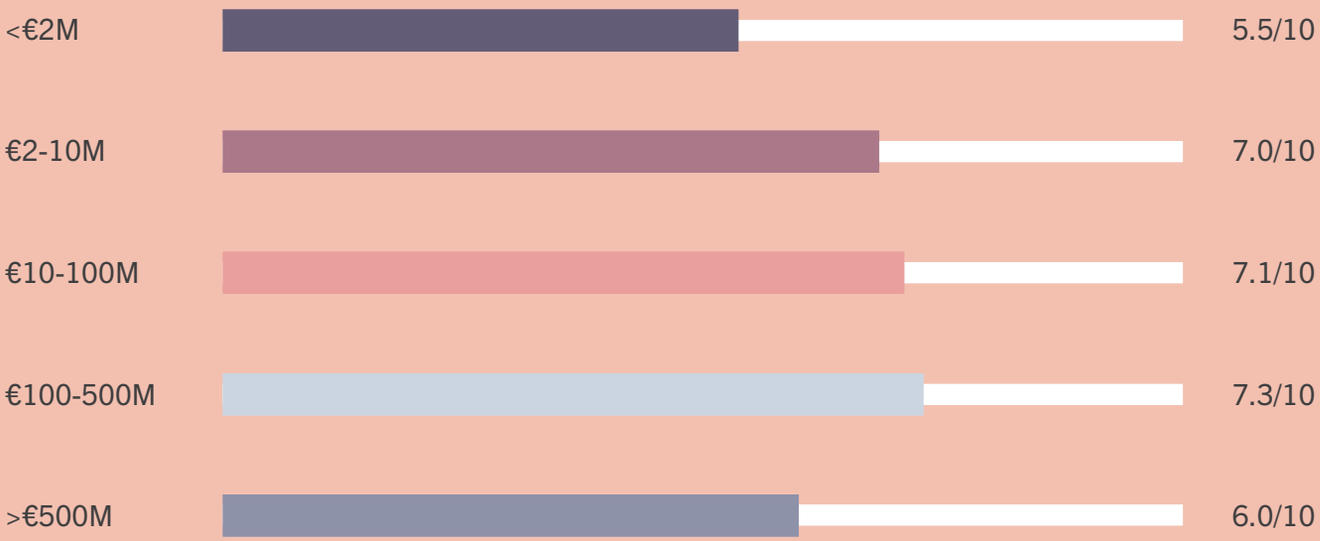
Energy projects lead at 6.9/10, possibly due to stricter regulatory requirements driving better data governance.

Perhaps most surprising: budget size doesn't correlate with confidence in a straightforward way.

Projects in the €100-500M range report higher confidence (7.3/10) than mega-projects over €500M (6.0/10).

Scale amplifies data management challenges rather than resolving them.

DATA CONFIDENCE BY BUDGET SIZE



POINT OF VIEW

6.7/10 raises a simple question

A confidence score of 6.7 out of 10 suggests that data consistency cannot be assumed. Sometimes standards are missing. Sometimes they exist but are unevenly applied. In both cases, the result is variation. Mega-projects make this especially visible. Complexity does not create inconsistency, it reveals whether governance holds under pressure. The more relevant question may be this:

Are data compliance procedures integrated into the schedule for BIM deliverables?
If compliance is not part of the timeline, it becomes secondary. And secondary priorities rarely reach full confidence.

"BIM IS USED SELECTIVELY. ARCHITECTS RARELY PROMOTE BIM PROACTIVELY SINCE THE HOAI FEE STRUCTURE IN GERMANY DOES NOT ACCOUNT FOR THE ADDITIONAL BIM-RELATED EFFORT."

VDC Lead, Germany

02

WHERE DATA FRICTION OCCURS

02 WHERE DATA FRICTION OCCURS

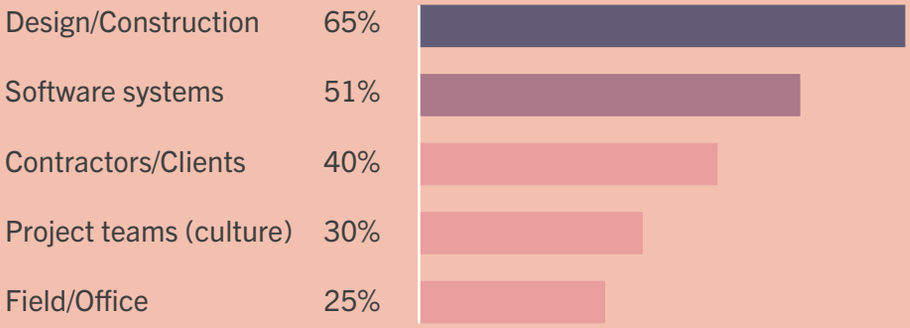
2/3

REPORT FRICTION BETWEEN DESIGN AND CONSTRUCTION TEAMS

"DRAWINGS, MODELS AND BOQ DON'T MATCH."

Consultant, Switzerland

WHERE DATA FRICTION OCCURS MOST



If there's one place where data goes to die, it's the handoff from design to construction.

65% of respondents identified this interface as a major friction point, making it the single most problematic transition in the project lifecycle.

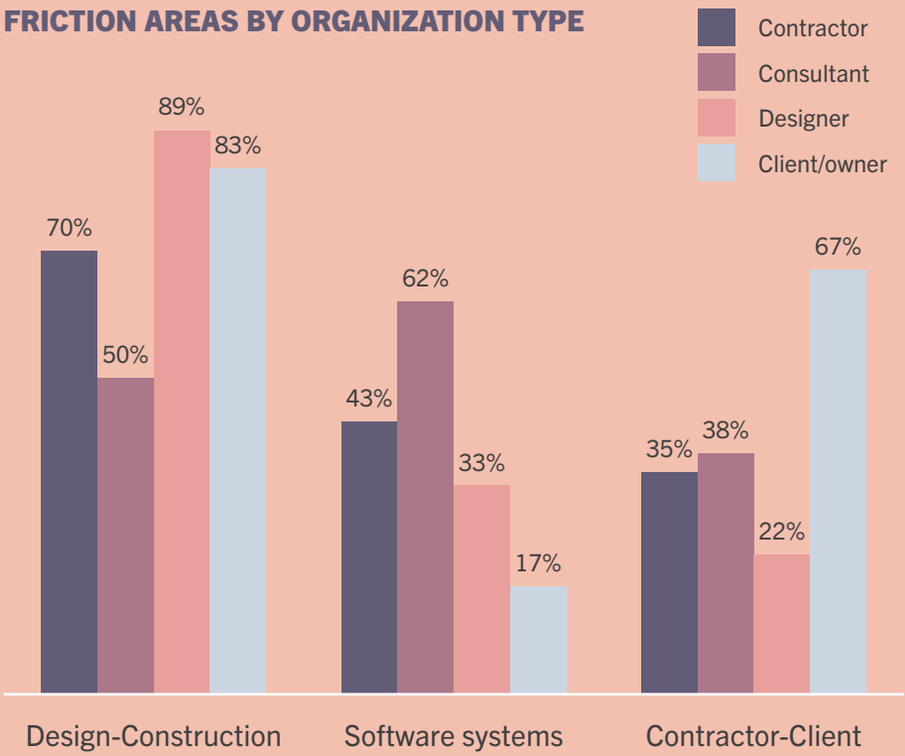
The pattern intensifies at the organizational level.
A striking ***89% of designer/ architect respondents*** report design-construction friction.

Client/owners follow at 83%, contractors at 70%, and consultants at 50%. Those with the broadest project oversight feel the handoff pain most acutely.

Consultants report software systems as their primary friction point (62%) - a reflection of their role bridging multiple platforms.

The friction follows function: ***where you sit in the project determines what pain you feel.***

FRICTION AREAS BY ORGANIZATION TYPE



POINT OF VIEW

If friction keeps happening, why does it keep happening?
65% report friction between design and construction. In this survey, 83% of client respondents experience it. Some of that friction comes from uneven QA. Some of it comes from requirements that can be interpreted differently.

But when the same issues appear at handover again and again, it is worth asking ourselves: are we clear enough about what is required, and why it is required?

And when data is incomplete or misaligned, does it lead to consequences for those responsible for delivering it?

"COMMUNICATION WITH NON-BIM USERS IS STILL VERY DIFFICULT.

MOST PROJECT INFORMATION IS SCATTERED ACROSS TENS OF THOUSANDS OF DOCUMENTS, AND BIM MODELS ARE RARELY USED AS A COMMUNICATION TOOL."

BIM Strategy Lead, France

03

PROJECT DELAYS AND COMMUNICATION GAPS

03 PROJECT DELAYS AND COMMUNICATION GAPS

63%

Experience occasional or frequent delays due to unreliable BIM data

While data confidence is middling and friction is pervasive, the industry has developed coping mechanisms.

Only ***14% report that project decisions are delayed 'very often'*** due to unreliable BIM data, though 49% say delays occur 'occasionally.'

"THERE ARE WAYS TO MAKE THE DATA PRODUCED IN A BIM ENVIRONMENT READABLE BY NON-BIM USERS, BUT IT'S NOT SO STRAIGHTFORWARD."

BIM Manager, UK

THE BUDGET PARADOX

The largest projects (€500M+) show the highest frequency of 'very often' delays at 30% - significantly above the 7% rate for mid-sized projects.

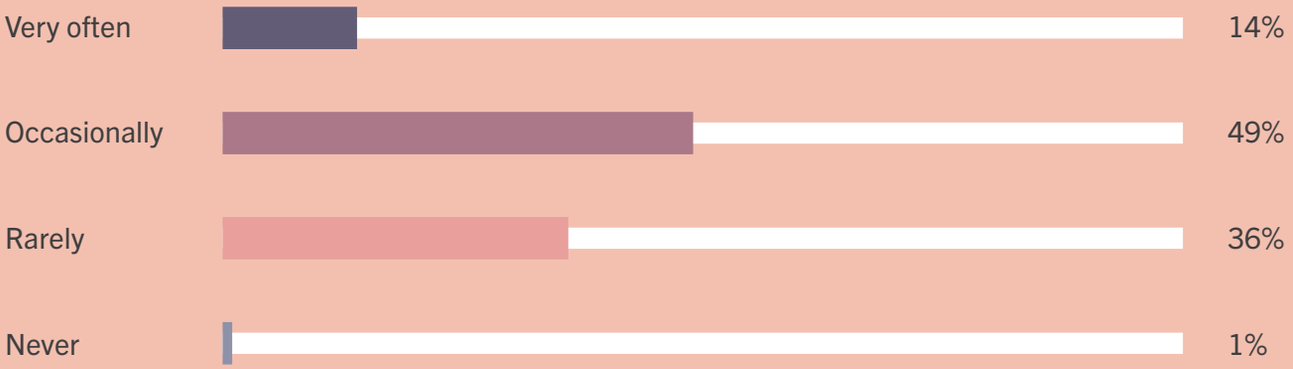
This reinforces the earlier confidence findings: ***scale doesn't solve data problems, it multiplies them.***

NON-BIM USER COMMUNICATION

When asked how effective their tools are for communicating with non-BIM users, respondents gave an average rating of 3.2 out of 5.

This mediocre score is perhaps the most telling finding: ***BIM's value isn't measured by how well it serves specialists, but rather by how well it enables everyone else.***

HOW OFTEN ARE DECISIONS DELAYED DUE TO UNRELIABLE BIM DATA:



POINT OF VIEW

Are we rushing past reliability?
63% report occasional or frequent delays due to unreliable BIM data. Projects rarely stop, but decisions often slow down.

Unreliable does not always mean incorrect. Sometimes the data is there, but it is not structured or presented in a way that supports decision-making. In the push to meet milestones, validation and clarity can become secondary. The model progresses, yet confidence does not.

When decisions require clarification calls, manual checks, or additional explanations, time is already lost. The delay does not begin when a decision is questioned.

It begins when reliability and clarity were not secured earlier.

“BIM IS NOT UNDERSTOOD WELL. THEY THINK IT IS REVIT”

BIM Manager, Spain

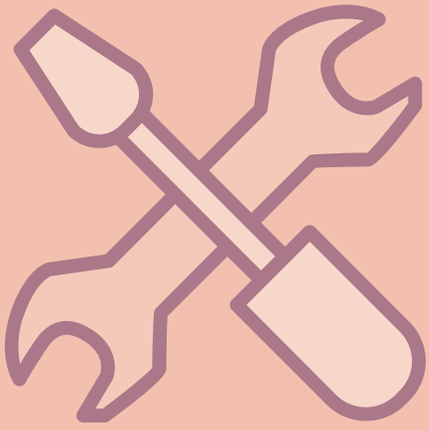
04

THE TOOL LANDSCAPE

04 THE TOOL LANDSCAPE

Revit's dominance is overwhelming and unsurprising. 76% of respondents use it, making it the undisputed center of gravity for BIM workflows.

This near-monopoly creates both standardization benefits and vendor lock-in risks: when Revit struggles with large assemblies or complex parameters, the entire project feels it.



EXCEL: THE UNSINKABLE WORKAROUND
Despite billions invested in construction technology, Excel remains indispensable. Over half (51%) list spreadsheets as a critical data source - tied with document management systems.

Every Excel workaround represents a gap in the digital workflow: a place where data escapes the managed environment.

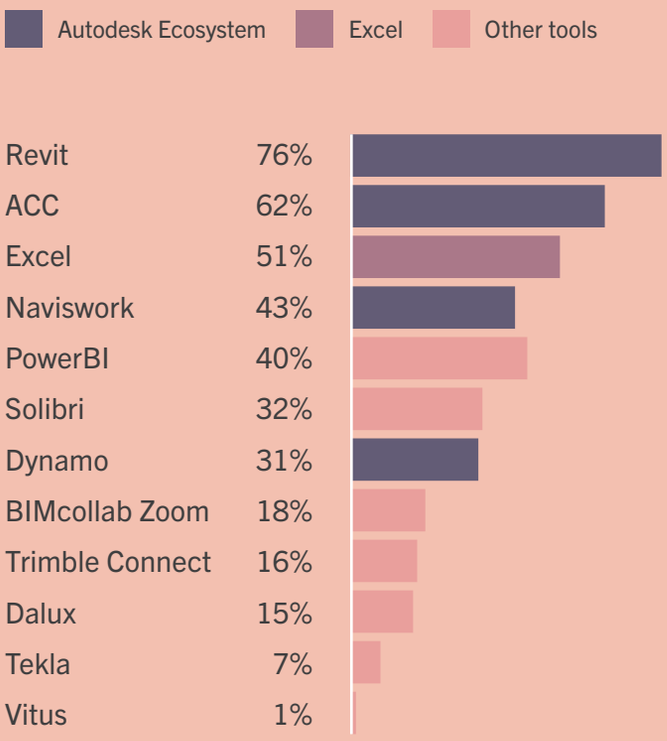
"THE SOFTWARE LOCK-IN FROM REVIT."

Response to 'What would you change?', Belgium

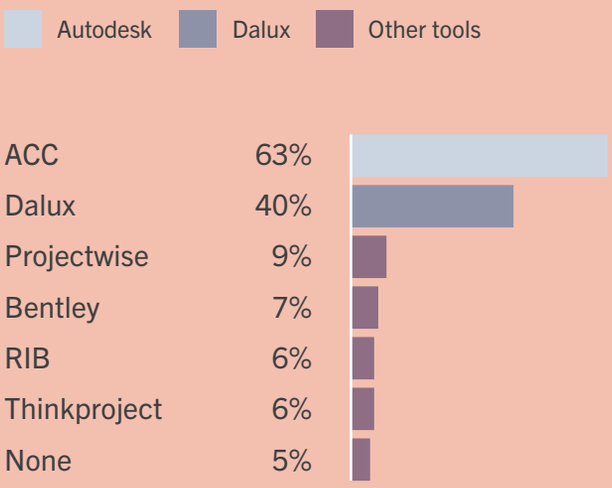
CDE FRAGMENTATION
In the CDE space, Autodesk Construction Cloud leads at 63%, followed by Dalux at 40%.
Unlike authoring tools where Revit dominates, the CDE landscape is split - different clients, countries, and project types favor different solutions.
This fragmentation means BIM professionals can't specialize; they need fluency in multiple platforms.

Several respondents mentioned that they've had to build custom communication tools (PowerBI dashboards, simplified viewers, or good old-fashioned 2D PDFs) because the BIM tools themselves are too complex for non-specialists.

TOOLS FOR DATA MANAGEMENT & VISUALIZATION



COMMON DATA ENVIROMENT (CDE) USAGE



POINT OF VIEW

When visualization works, do we stop asking how?
Turning model data into dashboards often requires a chain of tools, exports from Revit, connectors, visualization platforms, and frequently Excel to reshape or enrich information along the way. These workflows are usually built and maintained by a specialist who understands how the pieces fit together.

Once the data is visualized, the objective seems met.
But how often do organizations step back and ask whether the flow itself is optimal, or whether it has simply become dependent on one person's expertise? When the setup works, it is rarely questioned. Yet dependence can grow quietly behind the scenes.

"AI STILL STRUGGLES TO FULLY GRASP HOW THE CONSTRUCTION BUSINESS WORKS."

VDC Lead, Denmark

05

THE AI REALITY CHECK

05 THE AI REALITY CHECK

The AI revolution hasn't fully reached construction sites, but momentum is building. While ***33% report no AI adoption yet***, 43% are using document copilots and 26% employ code/specification search tools.

The adoption pattern suggests cautious experimentation rather than wholesale transformation.

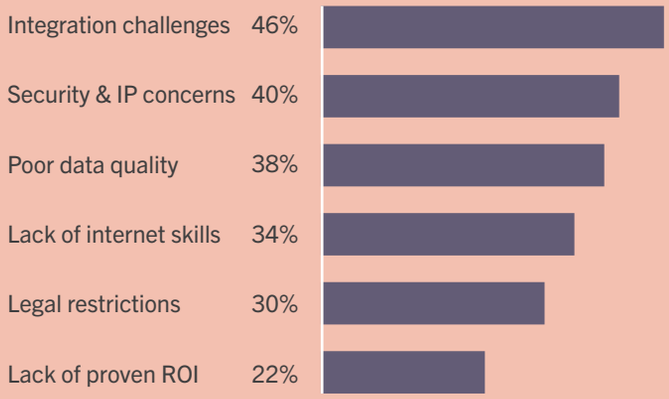
"IT WOULD AUTOMATICALLY CLEAN, STRUCTURE, AND VALIDATE IFC DATA SO I CAN RELY ON CONSISTENT PROPERTIES AND QUANTITIES WITHOUT MANUAL CHECKING."

BIM Manager, France

BARRIERS TO ADOPTION

Integration challenges top the barrier list at 46%, followed by security/IP concerns (40%), poor data quality (38%) and lack of skills (34%).

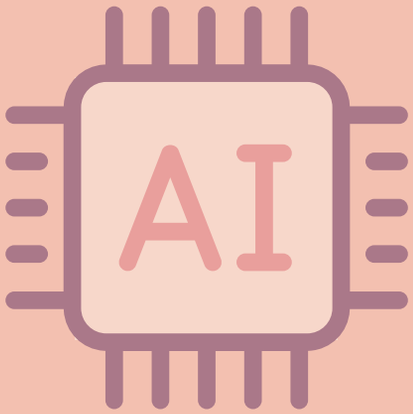
These barriers form a vicious cycle: poor data quality makes AI less effective, which reduces ROI, which limits investment in skills, which prevents proper integration.



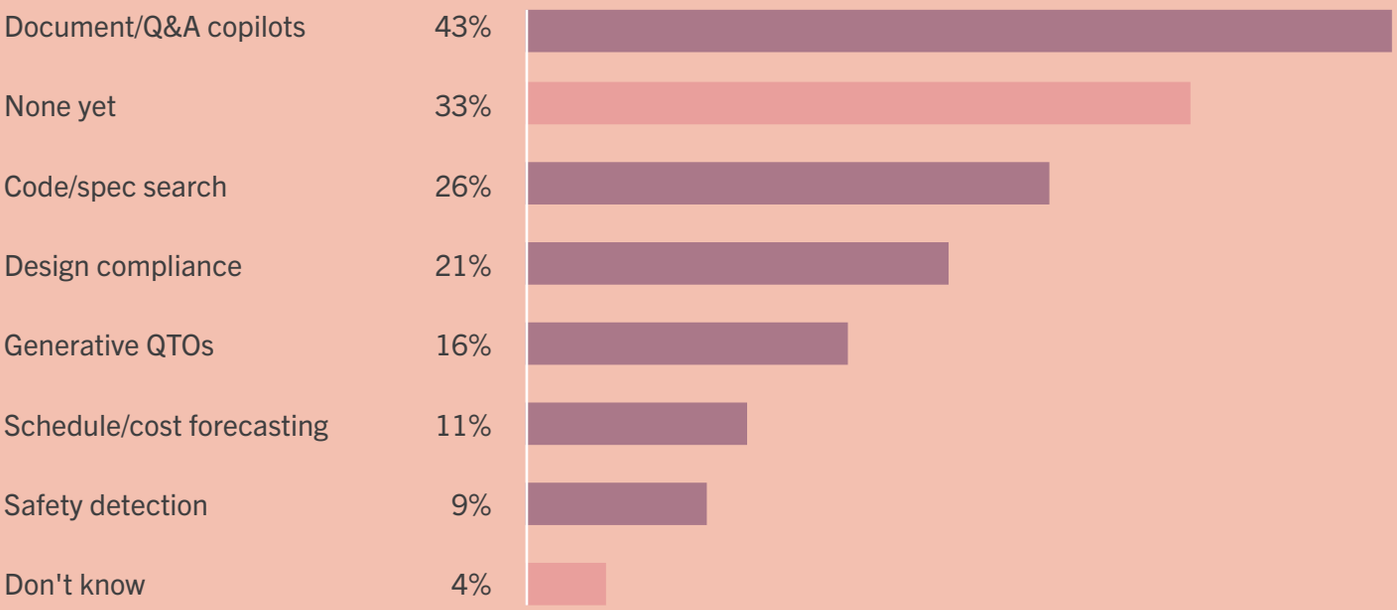
WHAT PROFESSIONALS ACTUALLY WANT FROM AI

The most requested AI application isn't generative design or autonomous construction, but rather data validation and quality checking.

Professionals want AI to handle the grunt work: checking, validating, enriching, and cleaning data. This pragmatic focus reflects hard-won experience: without clean data, nothing else works.



AI APPLICATIONS CURRENTLY IN USE



POINT OF VIEW

AI adoption reflects caution, not resistance
Adoption is emerging, but selectively. Document copilots are common. High-impact production use cases are rare.Professionals are not asking AI to redesign construction. They are asking it to validate data, search specifications, and reduce manual effort.

At the same time, integration challenges and security concerns remain significant barriers.

The pattern suggests pragmatism.
AI is being tested where risk is low and value is tangible, not where systems, governance, and data maturity are still evolving.

"IF I HAD A MAGIC WAND, I WOULD ELIMINATE INCONSISTENT MODEL DATA ACROSS DISCIPLINES AND SYSTEMS, SO THE PROJECT CAN RUN ON ONE RELIABLE AND FULLY ALIGNED SOURCE OF TRUTH."

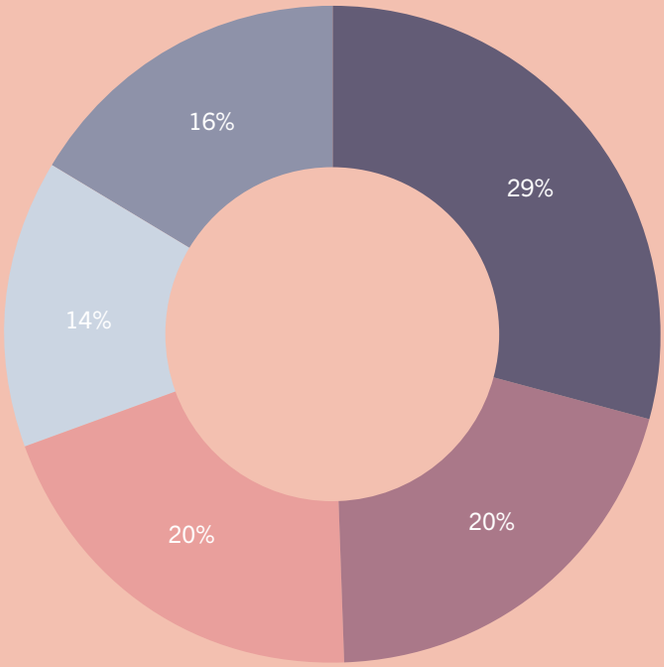
BIM Manager, Netherlands

06

TOP PRIORITIES FOR 2026

06 TOP PRIORITIES FOR 2026

WHEN ASKED ABOUT THEIR TOP DIGITAL PRIORITY FOR THE NEXT 12 MONTHS, RESPONDENTS REVEALED A FOCUS ON FUNDAMENTALS OVER INNOVATION.



INTEGRATION BEFORE INNOVATION
Data integration leads at 29%, followed by automation/analytics (20%), data standards (20%), team upskilling (16%), and real-time visibility (14%).

The emphasis on integration confirms a critical insight: before building the penthouse, the industry needs to fix the foundation.

TOP DIGITAL PRIORITIES (NEXT 12 MONTHS)

- Data integration
- Automation/Analytics
- Data standards
- Real-Time visibility
- Team upskilling

PRIORITIES BY BUDGET SIZE
The largest projects (€500M+) prioritize data standards and governance (30%), recognizing that at scale, consistent standards become essential.

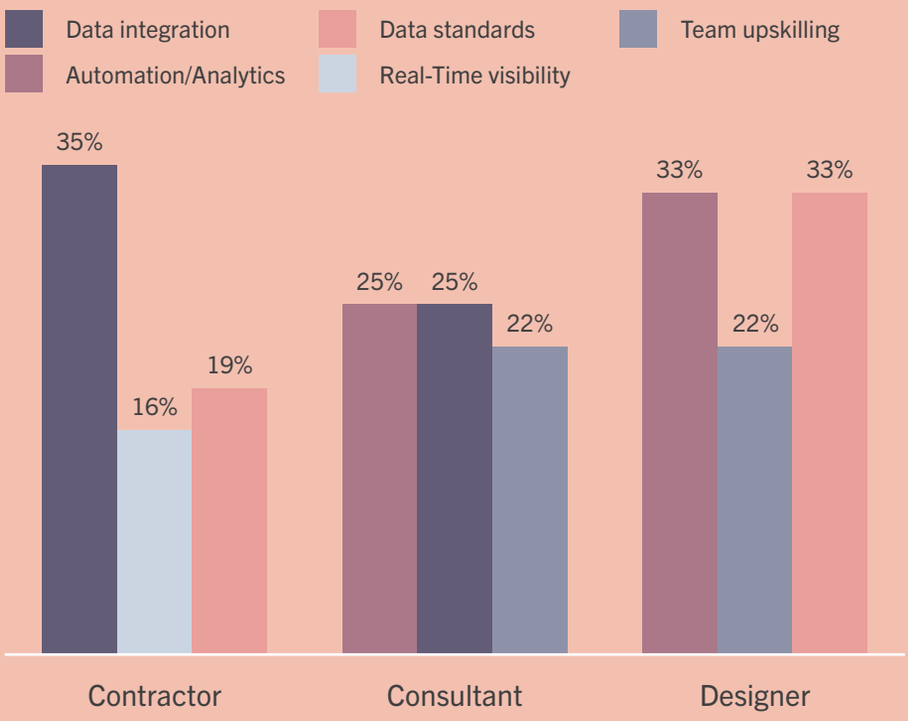
Mid-sized projects (€10-100M) focus on automation and data integration (both 26%), while smaller projects (€2-10M) emphasize team upskilling (29%), reflecting different resource constraints.

PRIORITIES BY ORGANIZATION

Contractors prioritize data integration (35%), reflecting their position at the receiving end of fragmented information flows.

Consultants prioritize data integration and automation equally (both 25%), while designers prioritize data standards and automation (both 33%), having presumably already addressed basic integration challenges.

TOP PRIORITY BY ORGANIZATION TYPE



POINT OF VIEW

Why do fundamentals keep topping the list? Integration, standards, and governance once again rank above advanced automation and innovation.

That may reflect maturity. But it may also raise a broader question. Is there a structural challenge in how the industry collaborates, one that repeatedly forces attention back to alignment and coordination? When projects are fragmented across contracts, disciplines, and systems, integration becomes a recurring priority rather than a solved problem.

If the foundation must constantly be repaired, innovation will always be sequenced behind it.

"I AM NOT CONVINCED THAT THE CONSTRUCTION INDUSTRY WILL BE READY FOR AI.

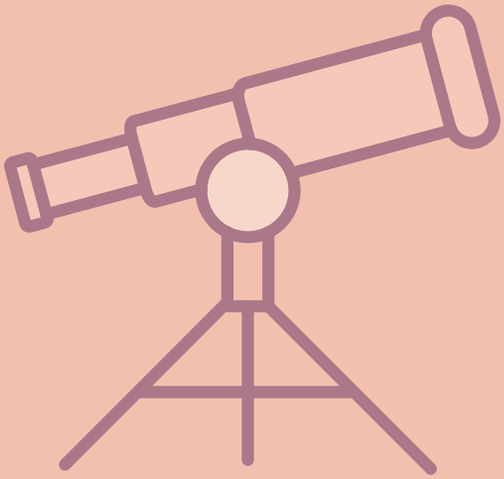
AT THIS STAGE, IT IS NOT HEADING IN THAT DIRECTION, AND I FIND IT DIFFICULT TO IMAGINE FRANCE CATCHING UP BY 2027. IT'S A REAL SHAME."

BIM Strategy Lead, France

07

THE 2027 VISION

07 THE 2027 VISION



WHEN ASKED WHAT TECHNOLOGIES WILL BECOME STANDARD WITHIN TWO YEARS, RESPONDENTS SHOWED MEASURED OPTIMISM ABOUT SPECIFIC CAPABILITIES WHILE REMAINING SKEPTICAL OF BROADER TRANSFORMATION.

TOP PREDICTIONS

Near real-time data sync between office and field tops the list at 40%, followed by model-based cost controls (38%), automated progress tracking from reality capture (38%), and federated CDE (35%).

These predictions reflect practical evolution rather than revolutionary change.

"TIME WILL SHOW. AUTODESK IS DEFINITELY WORKING ON SOMETHING BIG, AND IT'S DEFINITELY AI-DRIVEN."

Developer, Denmark

ROLE-BASED PERSPECTIVES

Each role gravitates toward capabilities closest to their daily pain points. Construction engineers unanimously prioritize automated progress tracking (100%), while VDC leads favor real-time data sync (55%), reflecting their role bridging office and field. BIM managers place model-based cost controls (5D) at the top (44%), with real-time sync and progress tracking tied just behind.

Notably, not a single VDC lead expects digital twins with live telemetry to become standard by 2027 - a striking contrast to the 16% overall figure. Those closest to implementation may be the most realistic about timelines.

WHAT WILL BE STANDARD BY 2027?

38%
Automated progress tracking

40%
Near Real-Time Data sync

38%
Model-based cost controls (5D)

POINT OF VIEW

If real-time sync is expected, who is moving toward it?
Many expect near real-time data synchronization to become standard within two years.

The technology already exists in various forms. The question is whether organizations are actively seeking tools and setups that enable it, or whether they expect their current platforms to evolve and eventually deliver it.

Belief in a capability does not automatically translate into action.

If real-time collaboration is truly a priority, it may require deliberate choices, not just patience.

08

MAGIC WAND WISHES

08 MAGIC WAND WISHES

WHEN WE ASKED WHAT RESPONDENTS WOULD CHANGE IF THEY HAD A MAGIC WAND, THEMES EMERGED WITH STRIKING CONSISTENCY.

"TIME WILL SHOW. AUTODESK IS DEFINITELY WORKING ON SOMETHING BIG, AND IT'S DEFINITELY AI-DRIVEN."
Developer, Denmark

THEME 1

DATA QUALITY AND STANDARDS (40 MENTIONS)

The most common wish centered on consistent, reliable data. Respondents want naming conventions that don't vary between disciplines, parameters that actually carry through from design to construction, and standards that everyone follows.

"Inconsistency. People name the same thing in 500 different ways, which makes it very time consuming to sort and filter data."
BIM Manager, Sweden

THE IMPACT THEY'RE SEEKING
When asked what achieving these changes would mean, responses converged on a single theme: time. Time currently spent on digital housekeeping could be spent on actual value creation.

As one respondent put it: 'Less emphasis on firefighting and more on proactive execution.'

"It would allow me to make decisions faster and with far more confidence, because I could trust the model data without spending time on manual checks."
BIM Manager, France

THEME 2

INTEROPERABILITY
(21 MENTIONS)

After decades of 'open BIM' initiatives, the industry is tired of waiting. They want systems that actually communicate, data that actually transfers, and workflows that actually flow.

"Eliminate all breaks between systems, disciplines, and data formats - a fully seamless, interoperable BIM ecosystem."
BIM Manager, Germany

THEME 3

PEOPLE AND CULTURE
(17 MENTIONS)

Many wishes focused on changing mindsets rather than technology.

The tools exist; the willingness to use them properly is what's missing.

"I'd get rid of all contractors that still work on papers."
BIM Manager, Ireland

POINT OF VIEW

The magic wand reveals what still isn't working
When respondents imagine a magic solution, they do not describe radical innovation.

They describe consistent data across disciplines. Clear standards. Systems that actually connect. Less time spent correcting and reconciling.

These wishes mirror the recurring themes throughout the survey: moderate data confidence, friction at handover, integration as a top priority.

The pattern is difficult to ignore. The industry is not asking for the next breakthrough.
It is asking for the basics to work reliably.