



AEC Forum 2025

Industry Keynote

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AECO

Architecture
Engineering
Construction
Operations



Buildings



Transportation

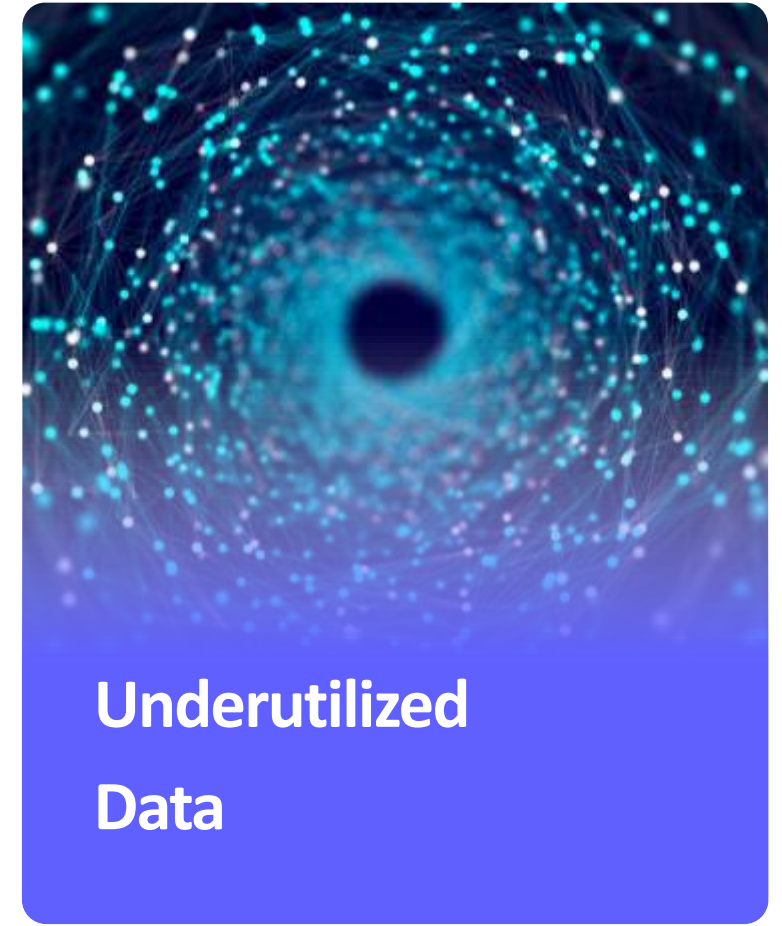


Water



Industrial

Need new ways of working to address industry trends



Need new ways of working to address industry trends



CONSTRUCTION DEMAND

2.6T FT

of **new constructed buildings** needed every month for **next 40 years** to fulfill demand¹

INFRASTRUCTURE STIMULUS

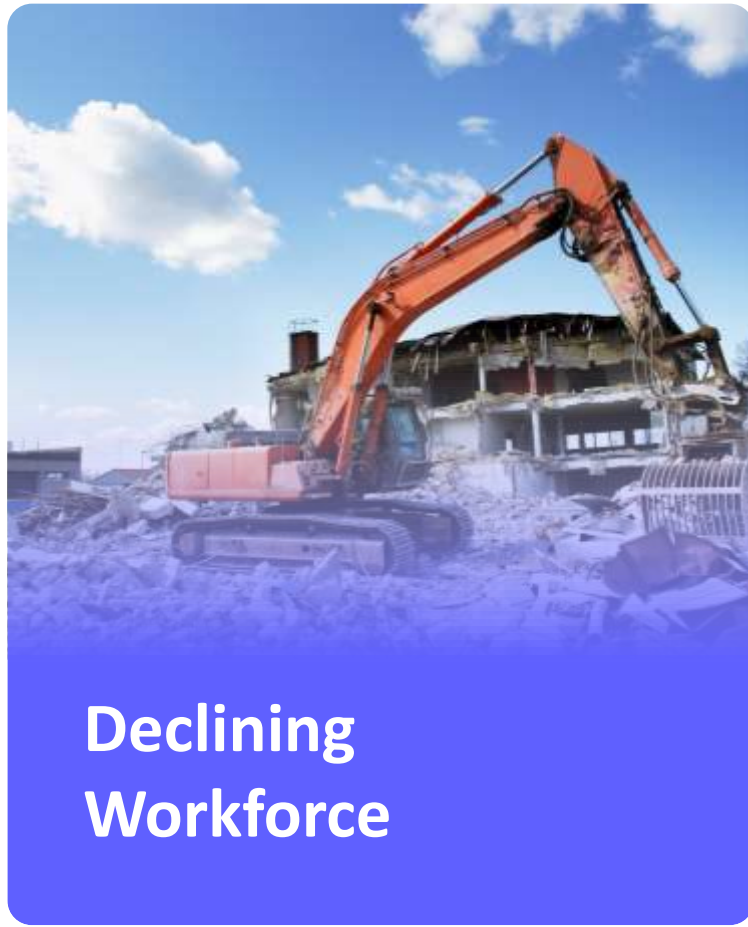
\$1.2T

incremental funding for Transportation has been announced to support post-COVID economic recovery²

¹ GlobalData / Construction Intelligence Center 2023 Forecast, 2022 – 2023 Growth

² Global Infrastructure HUB, InfraTracker, 2021 COVID-19 stimulus tracker

Need new ways of working to address industry trends



80%

Firms report **staffing shortages**¹

>50%

Firms **turn down work** due to lack of talent, challenging business growth²




¹ Architect Magazine

² ACEC

Lots and lots of data









Project Data

-  User Generated
-  AI Generated
-  Past Projects









Context Data

-  Site Context
-  Existing Conditions
-  Environmental
-  Supply Chain
-  Societal
-  Social Media Sentiment



Company Data

-  Standards
-  Classifications
-  Content
-  Past Projects
-  ERP, HR & Finance systems
-  Cloud-based storage

Need new ways of working to address industry trends



95.5%

Of all **data goes unused** in
engineering &
construction¹

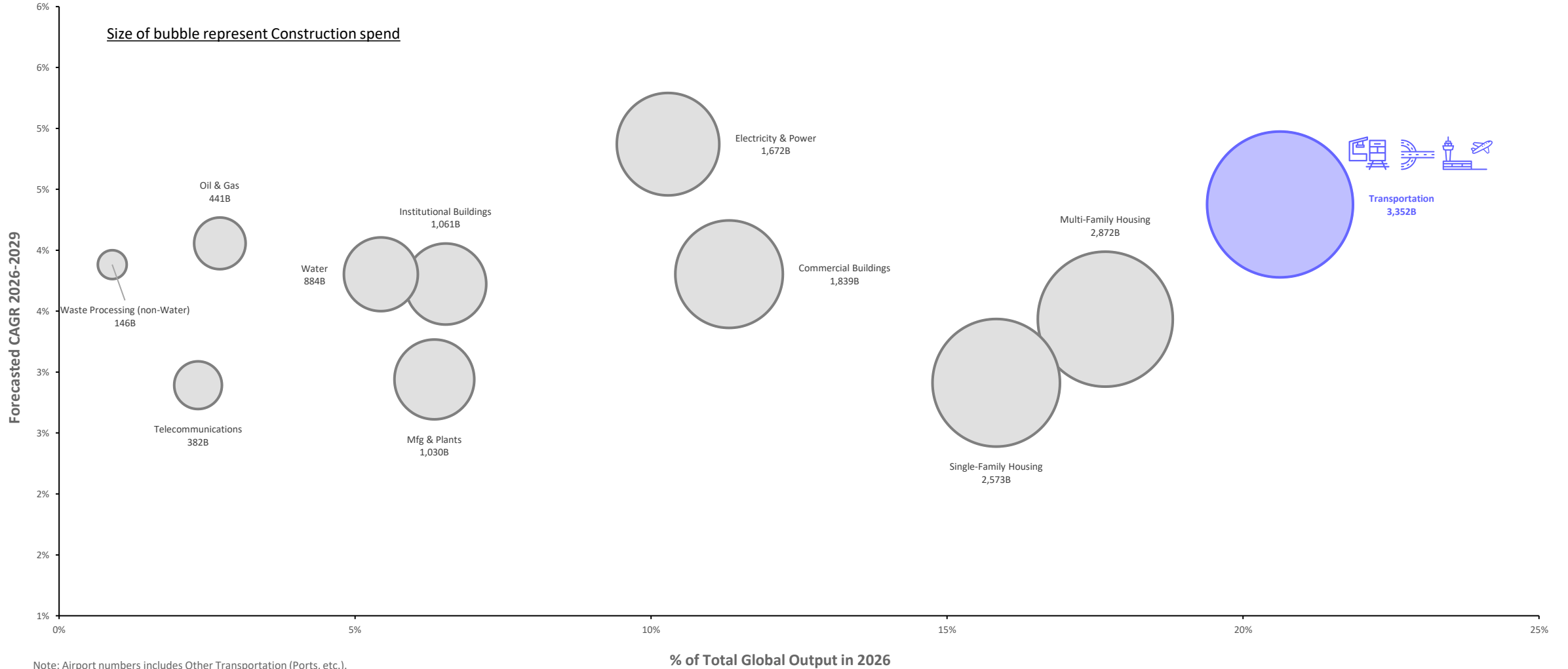
\$1.84T

Estimated annual **cost of
bad data to the global
construction industry**¹

¹Big Data = Big Questions for the Engineering and Construction Industry, FMI Report

Global Construction Spend By AECO Segment (2026)

Transportation is the largest segment



Note: Airport numbers includes Other Transportation (Ports, etc.).

Source: Construction Intelligence Center, 2025

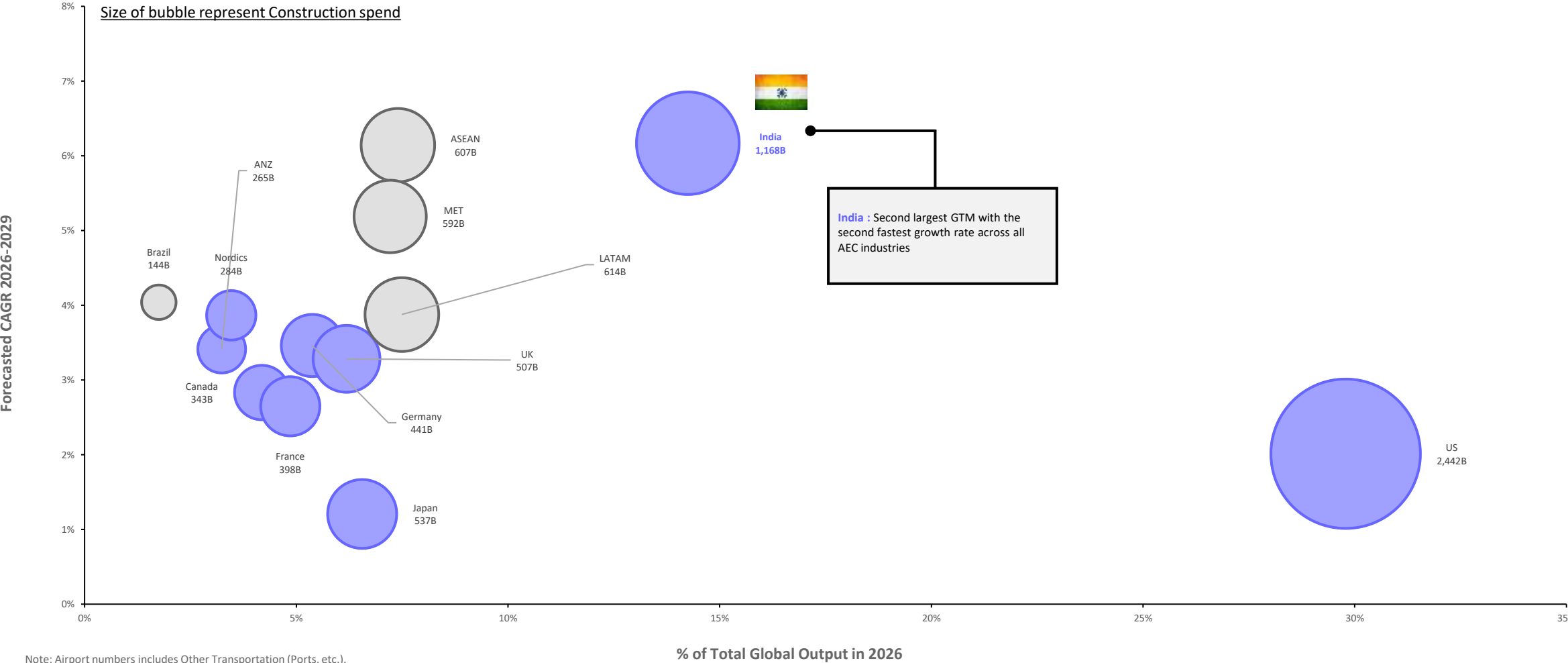
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Please note that 2026 is Calendar Year

Construction Spend by Country – All AECO Industries

2026 forecast

Focus GTM
Opportunistic



Note: Airport numbers includes Other Transportation (Ports, etc.).

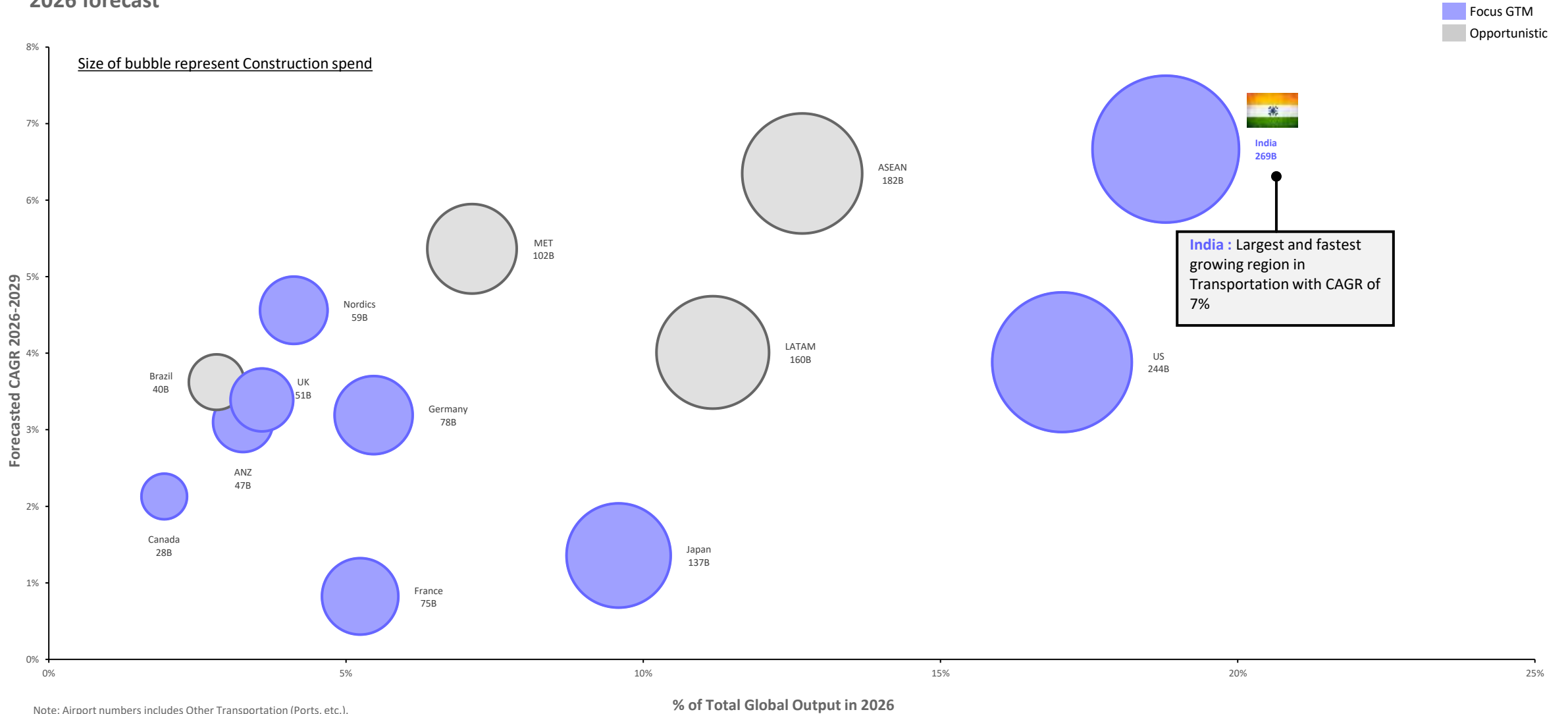
Source: Construction Intelligence Center, 2025

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Please note that 2026 is Calendar Year

Construction Spend – Transportation

2026 forecast



Note: Airport numbers includes Other Transportation (Ports, etc.).

Source: Construction Intelligence Center, 2025

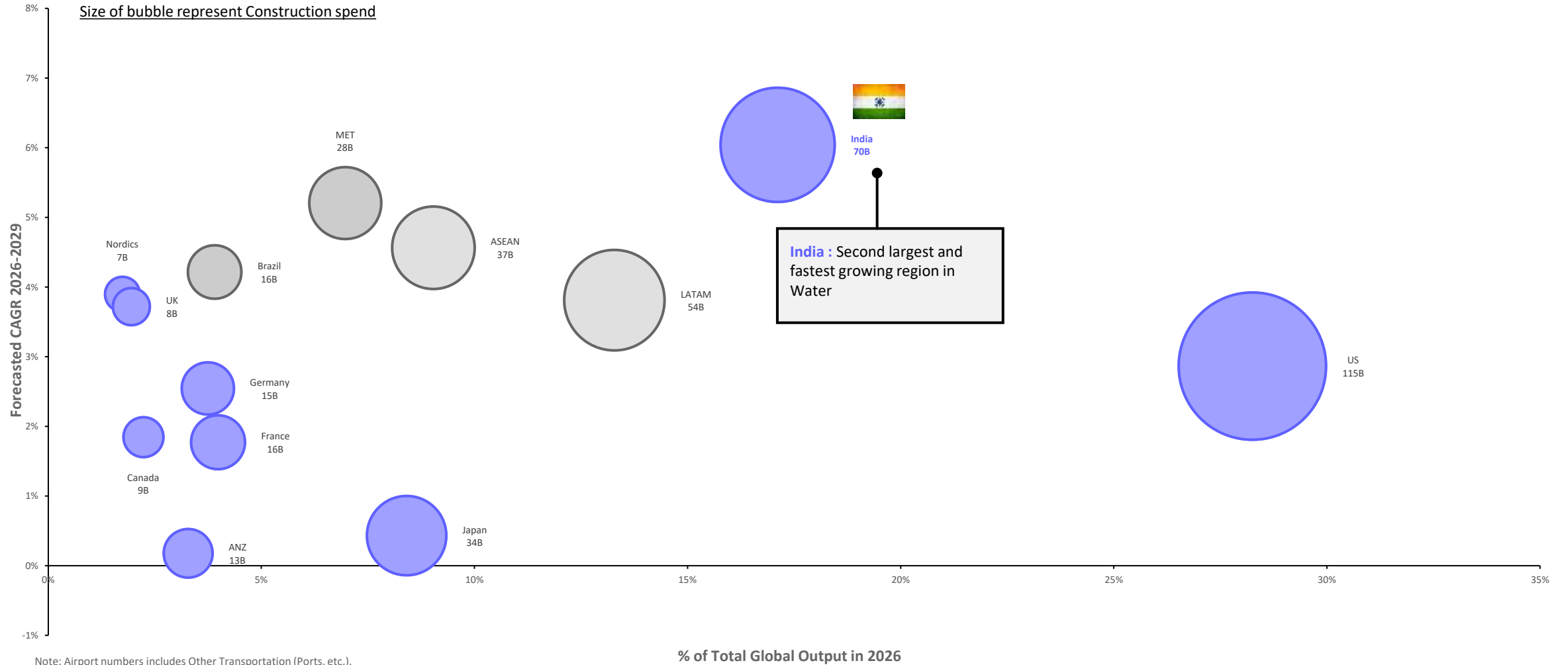
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Please note that 2026 is Calendar Year

Construction Spend - Water

2026 forecast

Focus GTM
Opportunistic



Note: Airport numbers includes Other Transportation (Ports, etc.).

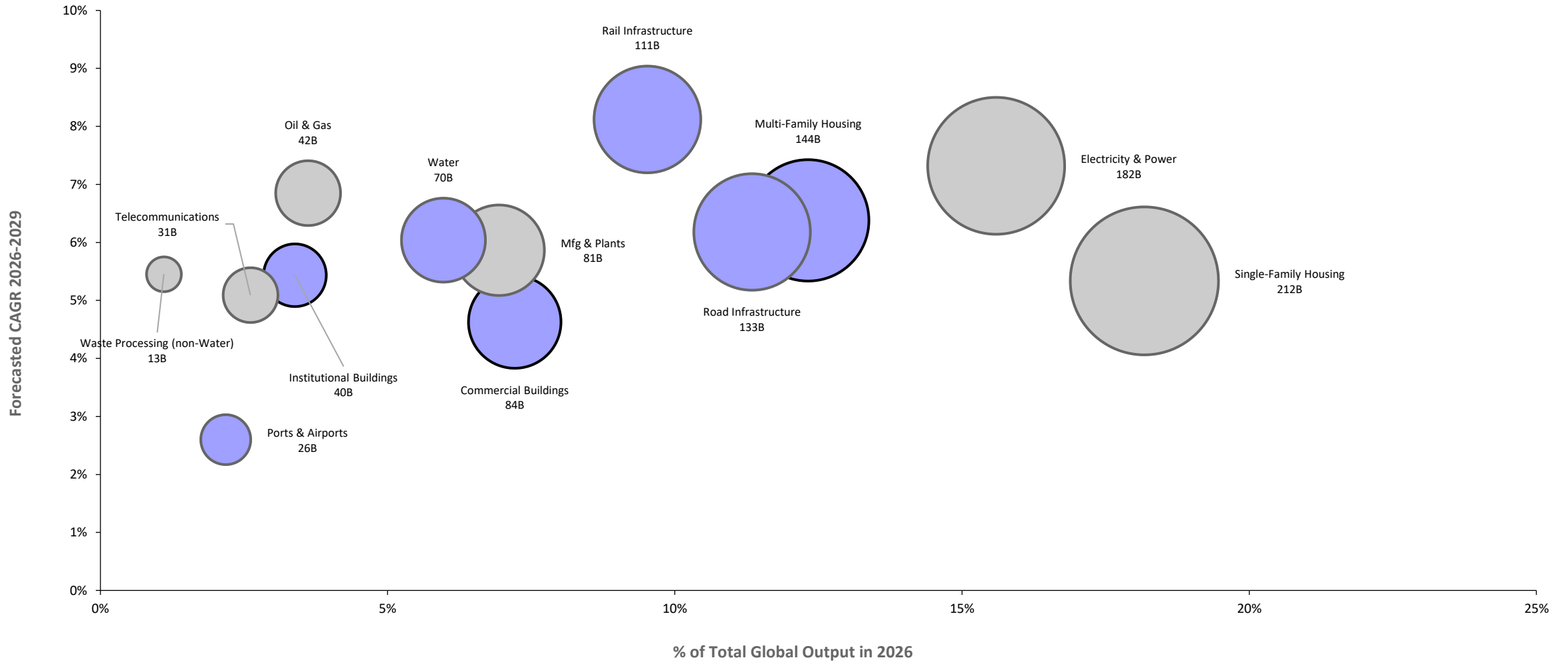
Source: Construction Intelligence Center, 2025

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Please note that 2026 is Calendar Year

2026 India Construction Forecast Spend

by Segment



India Infrastructure and Construction investment



CONSTRUCTION GROWTH

+5.8%

annual average construction spend growth expected to support the improvement of road, rail, and airport infrastructure



ROAD & HIGHWAYS

₹2.8T

allocated to the **Ministry of Road Transport and Highways in the latest budget** in the FY2025-26 Budget



RAIL

₹2.4T

allocated to the **Ministry of Railways** in FY2025-26 budget for rail infrastructure, modernizing operations and expanding capacity

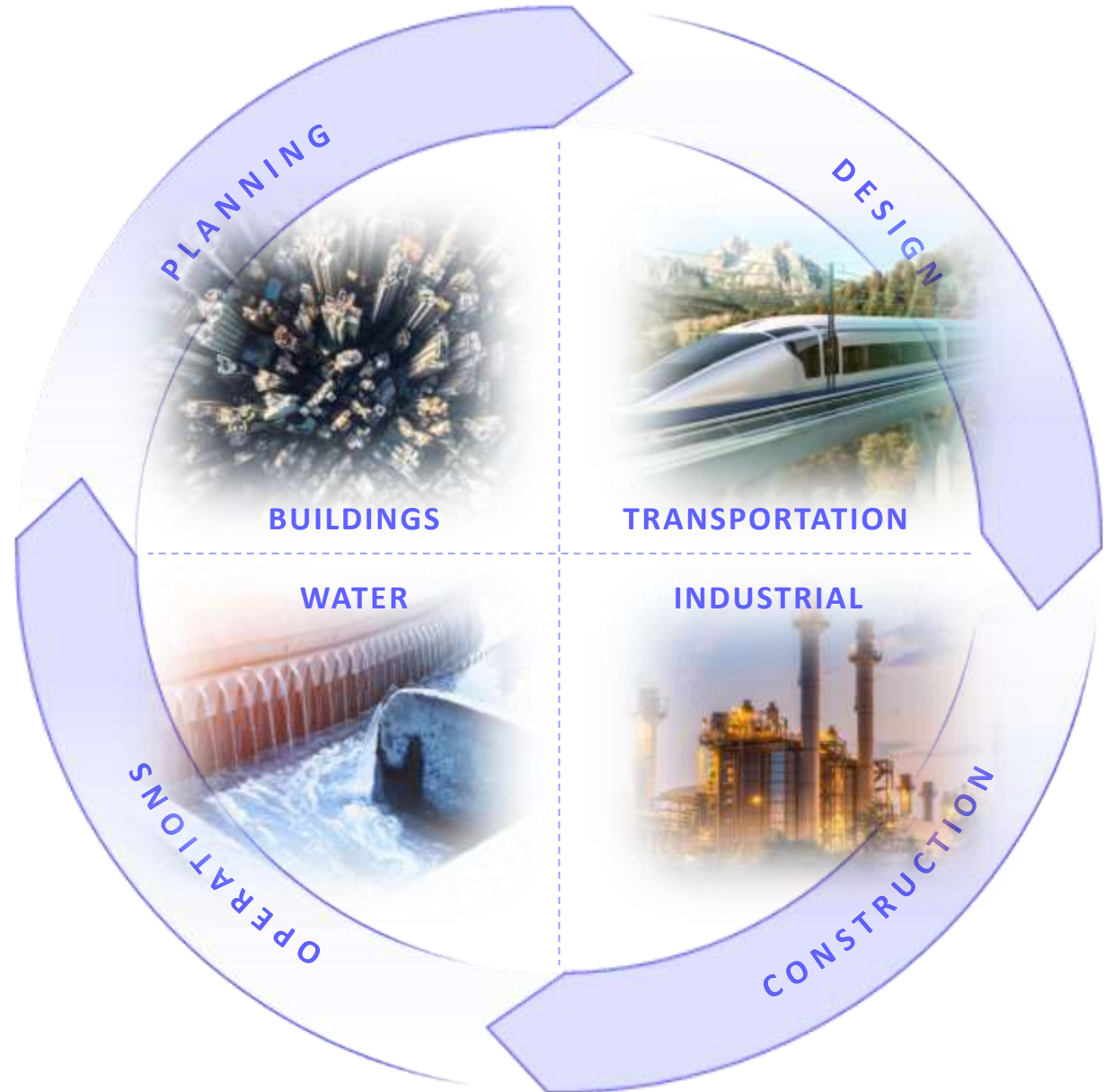


WATER

₹0.6T

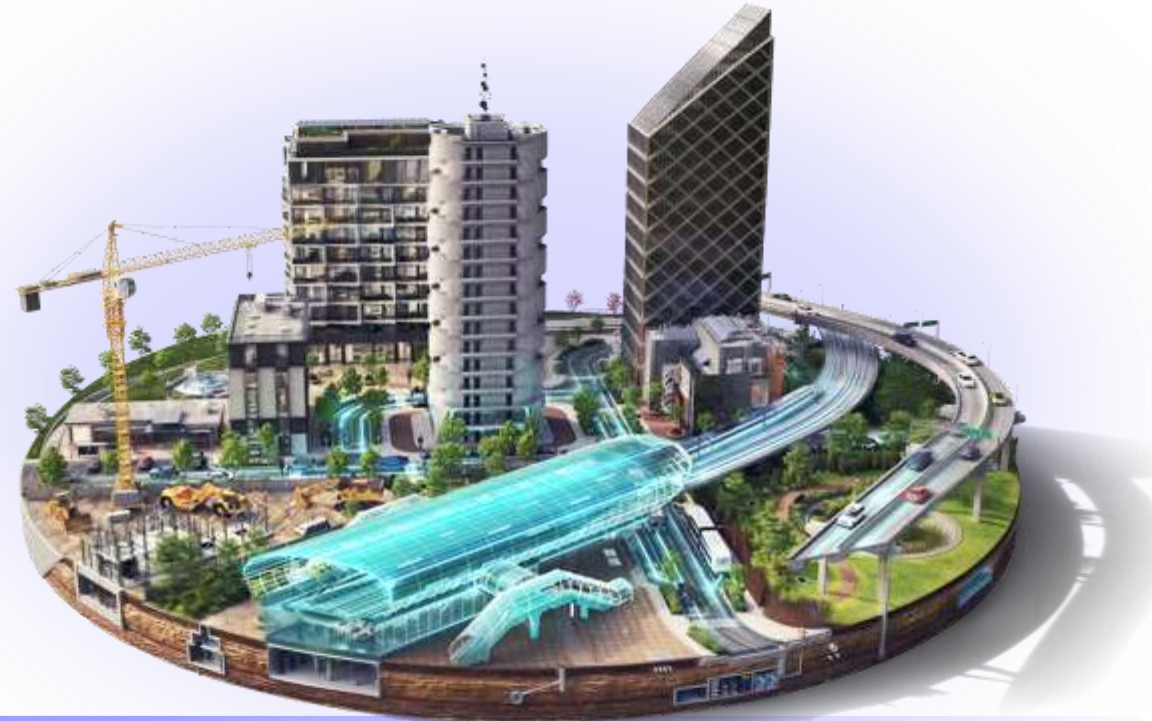
allocated to the **Jal Shakti Ministry** in FY2025-26 budget for clean water drinking, irrigation projects and river cleaning efforts

**Our vision is to enable
a full digital asset
lifecycle**

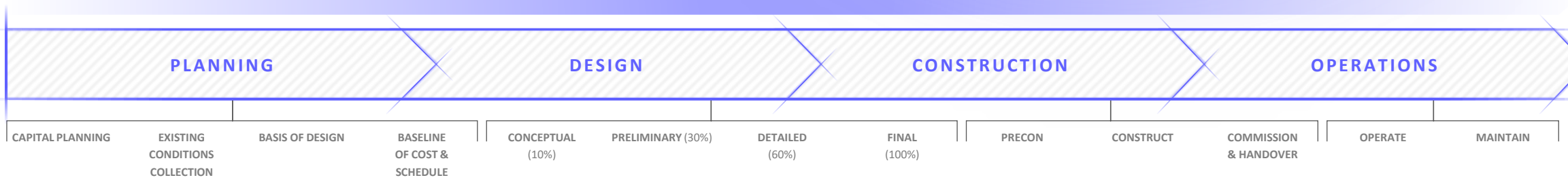


BIM is the backbone of digital transformation

Enables enhanced data-driven decision-making, reduced cost and improved operational efficiency through improved collaboration and project and asset management across asset lifecycle.



DIGITAL TWIN



DIGITIZING CONTENT MANAGEMENT, COLLABORATION, PROJECT CONTROL & COMPLIANCE

DATA CAPTURE

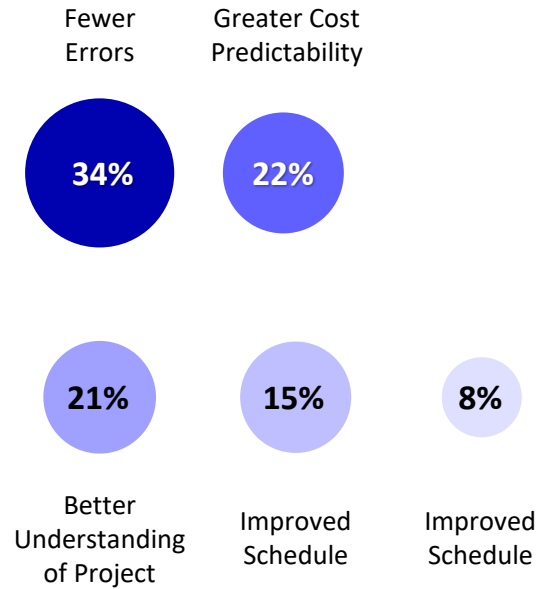
VISUALIZATION, ANALYSIS & OPTIMIZATION

BIM Benefits

Source: Dodge Data & Analytics
The Business Value of BIM for Infrastructure



Top Ways BIM Improves Process and Project Outcomes



Top Project Process and Outcome Benefits from BIM

Reduced Conflicts, Field Coordination Problems and Changes During Construction



Better Multiparty Communication and Understanding From 3D Visualization



Reduced Errors and Omissions in Construction Documents



Reduced Construction Cost



Reduced Rework



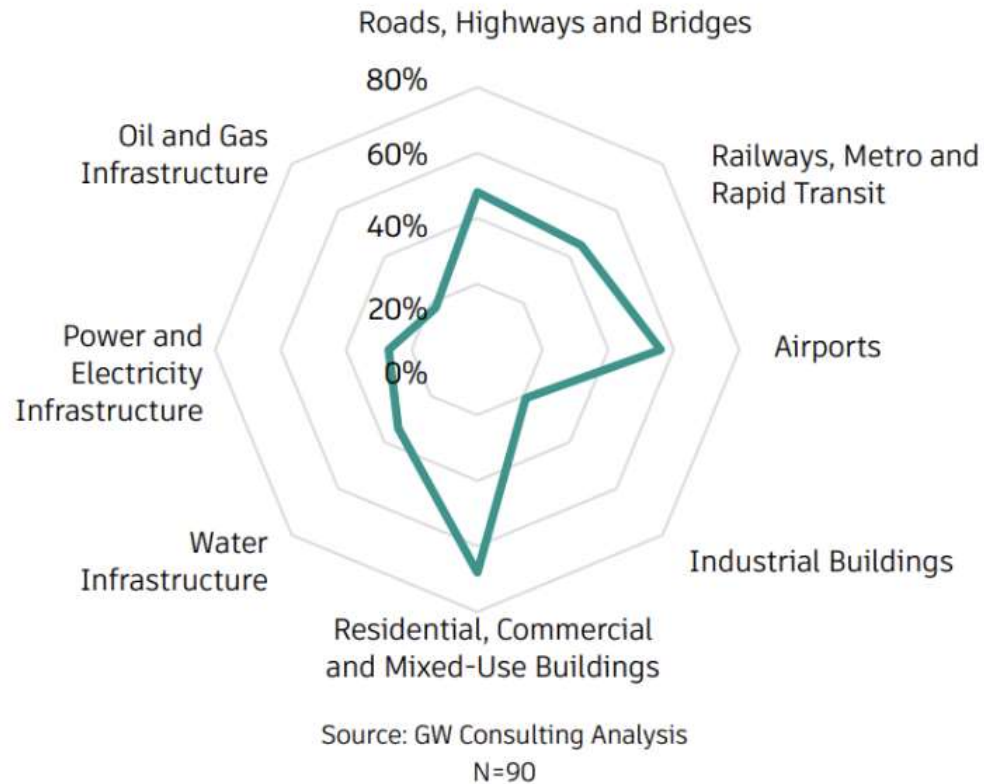
Greater Client and/or Community Engagement



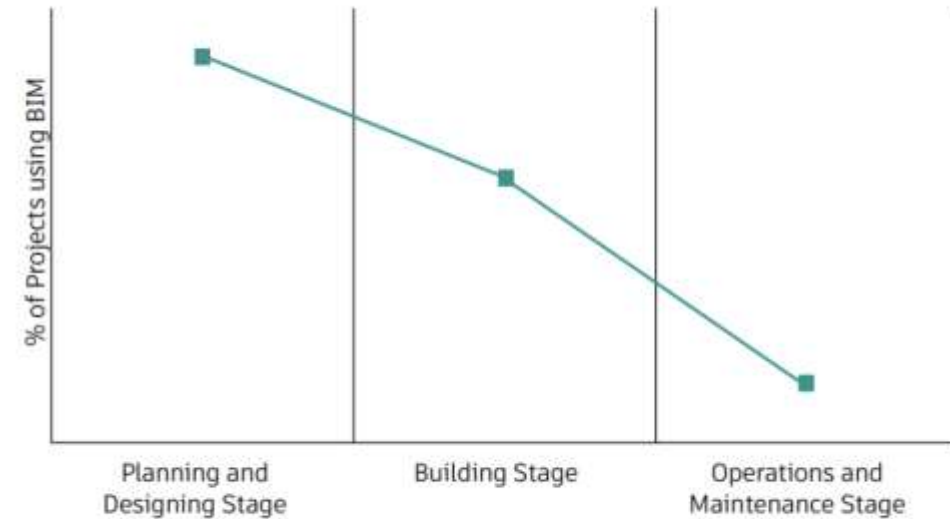
Reduced Overall Project Duration



Penetration & BIM Maturity in India



BIM Maturity Across Construction and Infrastructure Lifecycle



Source: GW Consulting Analysis
N=90

Source: BIM's Strategic Return on Investment for Indian Infrastructure Projects by Geospatial World

BIM Strategy



Accelerate digital project delivery

- Better connect people & processes
- Converge design and construction
- Enable hyper collaboration & better project management



Optimize design & build processes

- Automate physical to digital reality
- Transition design from 2D to Model-based
- Transform the construction value chain



Enable open and connected experiences

- Optimize workflows through automation and partnerships
- Improve interoperability through API's and open standards
- Transition from files to rich data centric workflows



DIGITAL TRANSFORMATION



WHAT IS THE FUTURE OF BIM?

2016
Connected
BIM

2002
BIM

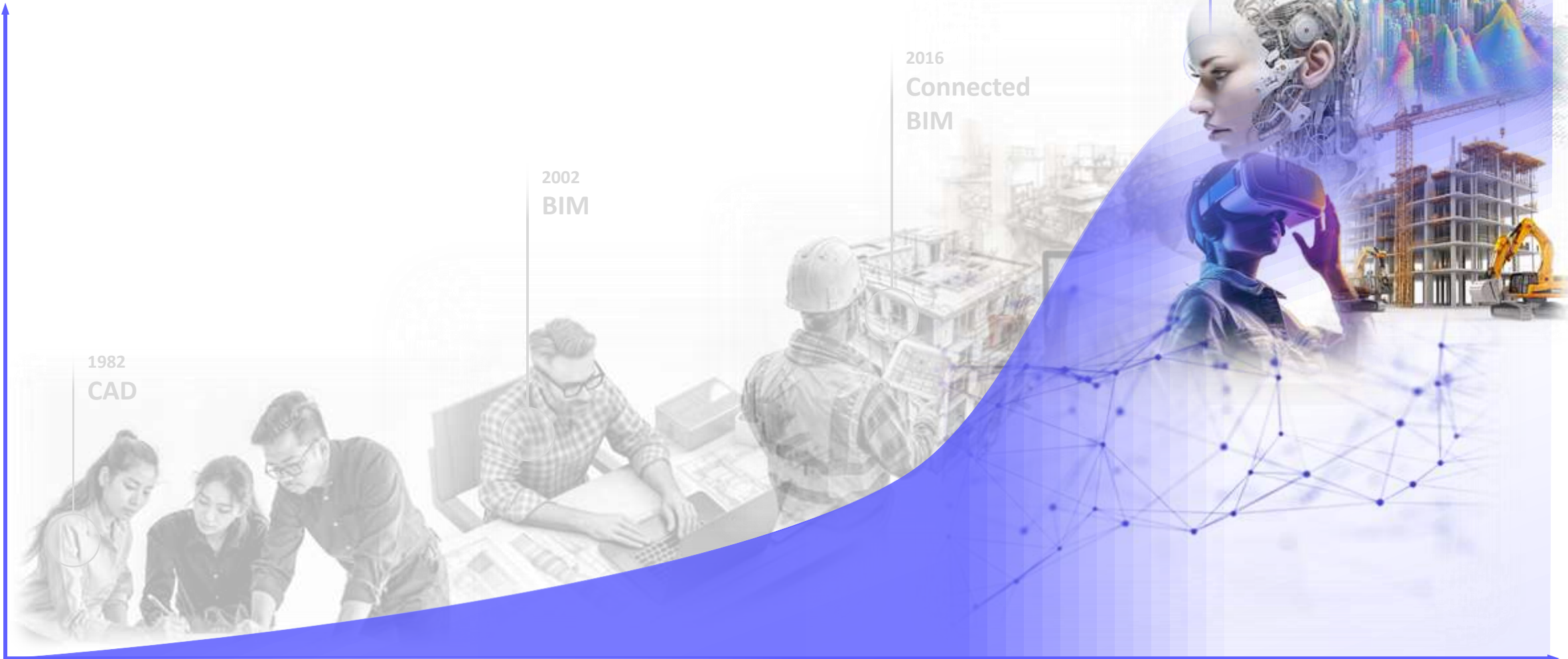
1982
CAD



TIME

Future of BIM is Outcome-based

DIGITAL TRANSFORMATION



The Future of BIM



**Connected
Granular Data**



DIGITAL THREAD



HYBRID WORKFLOWS



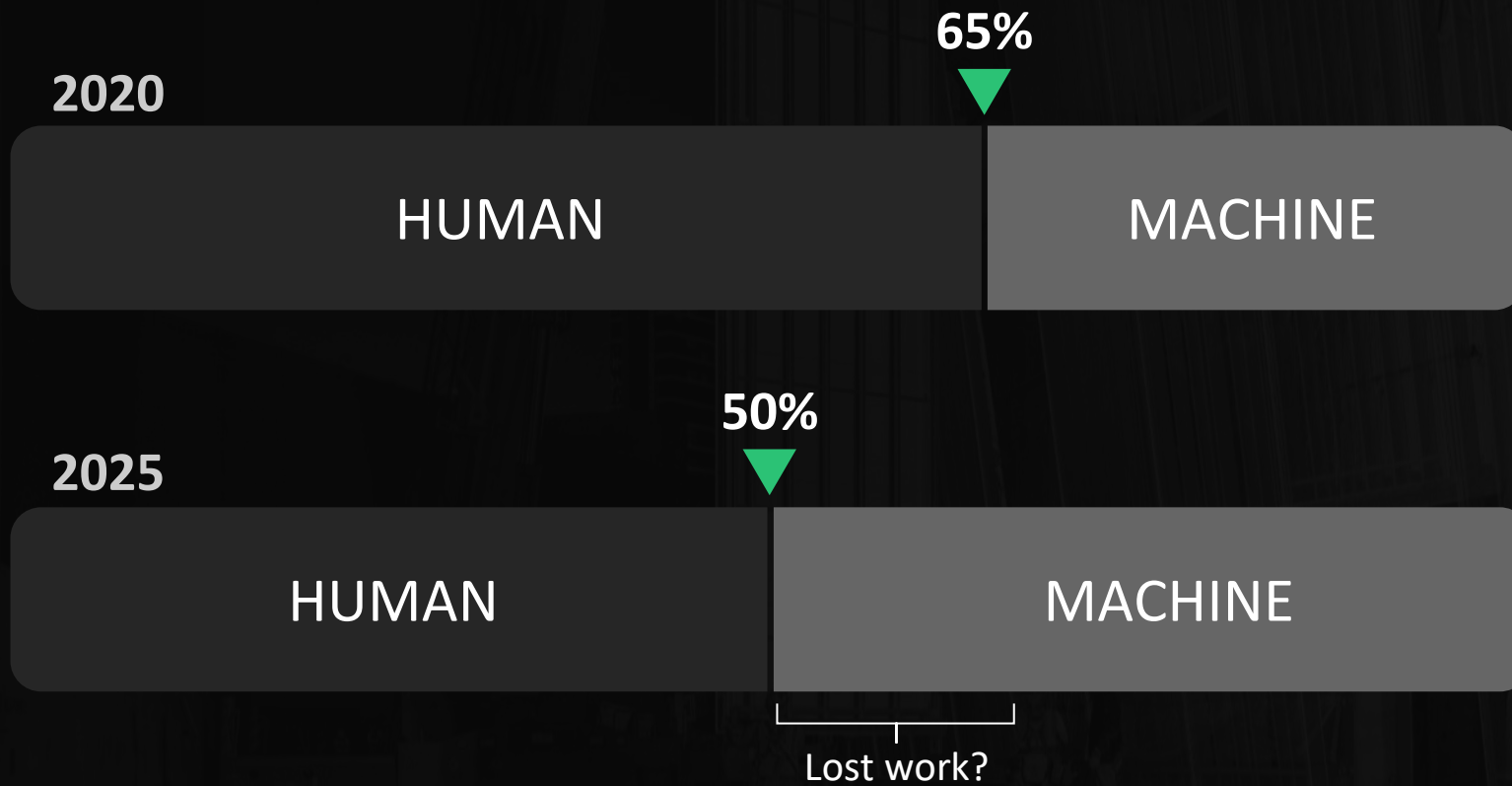
**AI
Powered**



**Outcome-based
BIM**



A new relationship with machines



A new relationship with machines

2020

65%



HUMAN

MACHINE

2025

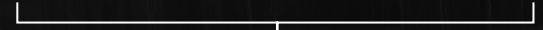
50%



HUMAN

MACHINE

More capacity

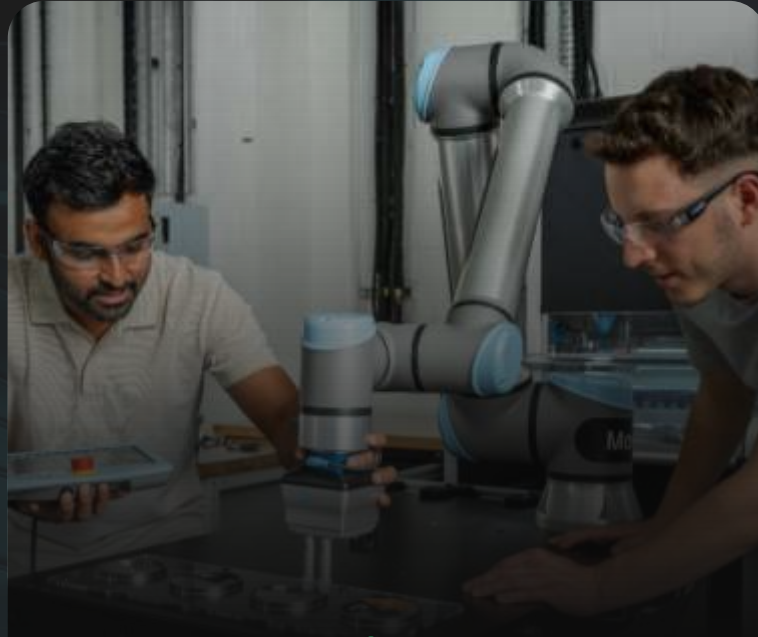


Benefits of AI



Assistance

Immediate insights, earlier



Automation

Reducing tedious tasks for more creativity



Augmentation

Enhancing exploration and experimentation

Outcome-based Approach



Outcome-based BIM approach will drive productivity across the project lifecycle

