IDC MarketScape

IDC MarketScape: Worldwide Construction Management Software 2026 Vendor Assessment

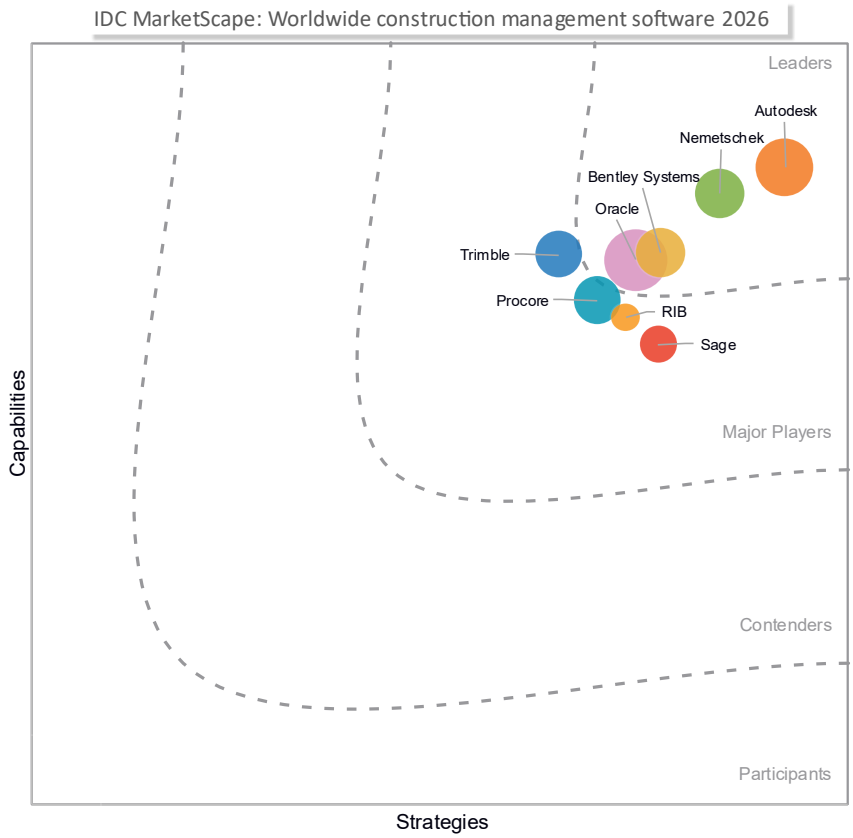
Jeffrey Hojlo

THIS EXCERPT FEATURES AUTODESK AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape worldwide construction management vendor assessment



Source: IDC, 2026

September 2026, IDC #US54135526e

Please see the *Appendix* for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Construction Management Software 2026 Vendor Assessment (Doc# US54135526).

IDC OPINION

The construction management software market is rapidly growing as contractors, specialists, and engineering, procurement, and construction (EPC) services firms continue to digitally transform. Similar to other industrial sectors, architecture, engineering, and construction (AEC) was late to leverage cloud platforms and applications as well as AI. Now, the industry is accelerating toward digital, virtually overnight in some cases from paper and analog. They realize that the age-old challenges in the construction industry of cost and time overruns, quality and safety issues, as well as true integrated project delivery (IPD) and collaboration, can be alleviated through much of the AEC software and hardware technology available today.

AI has certainly moved to the forefront of construction company's IT agendas, and software vendors in the space are responding. According to our March 2026 *Agentic AI Global Survey*, the top reason AEC companies want to utilize AI (typically a blend of ML, generative, agentic, etc.) is to improve supply chain efficiency and predictability, as well as workflow and data orchestration across projects; AI can unify data to improve project delivery timelines and costs, as well as provide guidance and predictability for future projects. This incorporation of AI across the construction life cycle, based on IDC's conversations with contractors and others in the industry, is with extreme caution to ensure quality, safety, and secure model development.

Ecosystem collaboration and data sharing continue to be critically important for construction project success as well, for two key reasons. First, with buildings contributing 30–40% of global CO_2 emissions and construction waste representing an ongoing challenge, AEC organizations' top priority in working with their industry ecosystem partners continues to be the improvement of sustainability and operational efficiency. This is expected by owners, and increasingly, driven by regulation. Secondly, contractors and others in the market recognize the need to work closely with AEC industry ecosystem partners to gain better, faster access to data, data models, and applications that support AI and GenAI initiatives that result in easier sharing of data before, during, and after projects for better innovation, quality, and safety. This is also a focus because of resource constraints (i.e., not enough workers) and the opportunity to improve productivity as well as augment knowledge.

With these trends and investment areas stated, the market has a short list of software platform players that support the entire construction life cycle from design to operations. This report focuses primarily on the preconstruction and project management segments of this life cycle, including building information modeling (BIM) integration, visualization, and model conditioning capabilities that are the bridge from design into preconstruction and the project itself.

Our research has found that the leading vendors in this report excel in three areas:

- Seamless workflow between BIM model conditioning and integration, preconstruction, and project management, as well as the ability to model project financials, scenarios, and optimal resources based on historical best practices. Ability to leverage this model in support of a 4D/5D/6D+ visually enhanced project management.
- Embedded AI across model conditioning, preconstruction, project management, engineering change, and the post-project handoff to owner/operations, combined with the flexibility of custom developing AI agents, and/or sourcing external data models or applications. Most organizations in the AEC industry are experimenting extensively with AI now, although they have not yet moved to true operationalization of the technology across the construction life cycle.
- Established set of complementary ecosystem partners and application marketplaces that support the dynamic nature of construction projects. That is, once the construction platform is in place, there will be several related areas not supported natively that require partners. As one large general contractor said, they need to have a “tool chest of multiple applications” on hand to address the unique challenges of a given project.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

- Reported a minimum of $250 million in combined on-premises license revenue and cloud-deployed annual recurring revenue from the AEC industry.
- Have customers using the suite of construction management (any of the products therein) software for building and facility construction for at least 12 months as of January 1, 2026. This includes facilities, factories, datacenters, or other buildings related to infrastructure, in addition to residential and commercial building construction. The scope of the report does not include construction management related to infrastructure such as roads, bridges, power grids, water supplies, and communication networks.
- Offers basic templates, applications, workflow, delivery, data management, and analytics capabilities natively or through partners for BIM integration, coordination,

and conditioning/preparation; preconstruction; project management; virtual design and construction (VDC); and project team collaboration.

- Provides predictive analytics and AI capabilities within the offering or through partners.

ADVICE FOR TECHNOLOGY BUYERS

As end-user organizations in the construction market — general contractors, subcontractors, specialists, EPCs, owner/operators — mature their use of digital tech, cloud, and AI, shifting the project team's approach to unification and platform collaboration, we recommend the following as you explore the right software vendor (or ecosystem of vendors) to support your business:

- Establish a unified industry ecosystem approach for all project participants, inclusive of shared data and insights, applications, as well as operations and expertise; this is critical for success during the construction project life cycle. Currently, IDC sees the following segments most often supported by partners in construction management: reality capture and field progress tracking, secure file sharing and document management, data analytics, project financials, and GIS/geospatial.
- Integrate preconstruction seamlessly from building model to project management for cost and time efficiency improvements that are often elusive. Cost estimation, quantity takeoffs, contractor network management, supply chain planning and sourcing, financial planning and management, and risk modeling are all aspects to look for in your construction management solution.
- Leverage digital twins to evolve as communication, collaboration, and project management tools for construction projects, as well as vehicles for post-project data handoff and operations. Visually enhanced decision-making leveraging BIM and digital twins, from design to operation, leads to greater time and cost efficiency as well as higher levels of quality and safety that is powered by a reliable, evolving data model foundation.
- Converge and optimize project data through an AI-enabled, common data environment (CDE) that the entire construction team and extended ecosystem can easily access. Project data typically exists with multiple teams and within multiple systems.
- Consider that sustainability remains a key reason why AEC organizations are improving their ability to collaborate and share data across their industry ecosystems and business networks, as buildings and infrastructure are a major source of CO_2 emissions. Incorporate this data set into your project planning and modeling process.
- Accelerate embedded AI use across the construction life cycle — the different flavors of AI, including machine learning, predictive, and generative, are currently immature

in the AEC industry, though they are ramping up considerably. We expect 2026 to continue as a year of AI experimentation, and 2027 to be a year of pivot toward increased AI investment, organizational enablement, improved data governance, and augmented decision making.

- Look for vendors with an open, configurable architecture. This approach will be important as AI agents become more common across the construction life cycle, thus requiring a steady stream of reliable, quickly integrated design, preconstruction, and project data from multiple sources.

VENDOR SUMMARY PROFILES

This section explains IDC's key observations resulting in a vendor's position in this IDC MarketScape. While every vendor is evaluated against the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

Autodesk

IDC has positioned Autodesk in the Leaders category of the 2026 IDC MarketScape on Construction Management Software vendor assessment.

San Francisco, CA (U.S.)-based Autodesk has 15,300 employees, having served the AEC industry since its founding in 1982, and reports AEC revenue of approximately 75% of the company's revenue. Much of this presence is due to the ubiquity of AutoCAD and Revit, the company's CAD and BIM design authoring tools, respectively, as well as a set of cloud-based design collaboration and construction management offerings available in the market for over 20 years, now under the Forma brand. Since 2018, the company has steadily acquired and built a suite of products to support engineering and construction beyond design and BIM, investing $1.5 billion in acquisitions to support preconstruction, resource management, and project management. These acquisitions include PlanGrid, BuildingConnected, Assemble, Pype, ProEst, PayApps, and Rhumbix (resource management and labor tracking, acquired in 2026).

It has also invested considerably in organic product development with R&D spending at 24% of total revenue, notably in support of project management and AI advancements. Its platform of offerings now encompasses 300+ integration partners and 400+ integrations via Autodesk Platform Services (APS) APIs and Forma Construction Connect. One particularly important partner for Autodesk is geospatial company Esri, with which it co-developed a product called GeoBIM in 2018. This will become increasingly important as the world of physical AI advances and location intelligence becomes a critical element of the underlying model.

In March 2026, Autodesk rebranded its construction management platform from Autodesk Construction Cloud (ACC) to Autodesk Forma, reinforcing its positioning as a connected

industry cloud that spans planning, design, preconstruction, and construction operations. Forma is cloud-native (software as a service or SaaS, multitenant only), supports 19 languages, and hosts data across 8 regional datacenters worldwide to address sovereignty requirements. This unified data approach also sets up construction organizations well, as one contractor we spoke with said, for the AI age.

Strengths

- Deep construction industry experience combined with a design-to-operate platform that includes project and geospatial information, as well as a digital twin offering to simplify post-project handoff.
- Embedded AI agents that are targeted for certain tasks (model info, schedule, RFIs, submittals) as well as a general Autodesk Assistant for cross-domain work and model analysis.
- Partnership ecosystem model: Autodesk Platform Services (formerly called Forge) provides a set of applications, APIs, and an open approach for development of new applications. It also has multiple construction communities and partner advisory councils to drive close customer engagement. One large general contractor customer describes its long-time relationship with Autodesk as “mutually beneficial;” other customers express similar sentiments.

Challenges

- Currently, it has no portfolio or capital management and only limited project risk modeling functionality. That said, Autodesk has focused on developing its project financial management capability in recent years for budgets, contracts, and payments; for example, through its January 2024 acquisition of PayApps, a payment applications and compliance management system (GCPay is the U.S. offering name, PayApps the offering name outside of the U.S.).
- Customers have noted that data flow/workflow between modules could be better to improve its capability as a unified, synchronous construction platform.
- Switching cost/inertia: Perhaps only natural, moving from firmly entrenched on-premises tools to cloud and connected, customers we spoke with said it took multiple years to shift over to the Autodesk suite of products from their legacy tools and systems. Part of this is technical, and part is the organizational maturity of the customer.

Consider Autodesk when

You want a single construction management platform across the project life cycle that supports BIM visualization, model coordination, preconstruction, project management, and post-project operational hand-off, as well as an extensive, strong partner ecosystem of providers and a global team that complements the suite of products.

APPENDIX

Reading an IDC MarketScape graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services, and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building and delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represent the total revenue/market share of each vendor within the specific market segment being assessed.

Each vendor evaluated for this IDC MarketScape has a well-rounded set of capabilities in construction management. All vendors ended up in the Leaders or Major Players segments due to their ability to meet the core requirements of having both broad functional expertise and a significant construction management customer base.

IDC MarketScape methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately, vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capabilities.

Market definition

For the purposes of this research, the IDC definition of construction management software for this report is as follows: Software platforms that manage the construction life cycle, including the following segments: BIM integration, coordination, conditioning/preparation; preconstruction; project management; VDC & project team collaboration. This **does not**

include initial design, CAD, and BIM authoring; it does include integration with, and use of, BIM throughout the construction process. Capability elements of each of the aforementioned phases are detailed within the RFI.

Other definitions:

- **AEC industry** (architecture, engineering, construction): Referenced in relation to questions on industry coverage and presence
- **BIM** (building information modeling)
- **VDC** (virtual design & construction): A team that virtually plans and coordinates across design, preconstruction, engineering, and project management before and during project execution.

LEARN MORE

Related research

- *IDC Survey: Agentic AI Use Cases and Trends in Construction, 2026* (IDC #US54686126, July 2026)
- *Digital Twins 2026: Five Key Trends for Industrial Engineering and Operations* (IDC #US54559226, June 2026)
- *Vendors as AI VCs: Autodesk Invests $200 Million in World Labs* (IDC #IcUS54430426, March 2026)
- *Orchestrating AEC Projects, Digital Twins, and AI via Geospatial* (IDC #US53973325, December 2025)
- *Architecture, Engineering, and Construction Industry 2025–2026 IT Trends: Ecosystem Collaboration, Digital Twins, and AI Innovation* (IDC #US53922225, December 2025)

Synopsis

This IDC MarketScape report analyzes vendors in the construction management software segment.

“The AEC industry is accelerating toward digital, virtually overnight in some cases from paper and analog. They realize that the age-old challenges in the construction industry of cost and time overruns, quality and safety issues, as well as true integrated project delivery (IPD) and collaboration can be alleviated through much of the construction management software available today,” said Jeffrey Hojlo, research vice president, IDC’s Industrial Ecosystems, Engineering, & Product Innovation Strategies.

ABOUT IDC

International Data Corporation (IDC) is the premier global market intelligence, data, and events provider for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community make fact-based technology decisions and achieve their key business objectives.

Global headquarters

One Beacon Street
Suite 33100
Boston, MA 02108
USA
508.872.8200
X: @IDC
blogs.idc.com
www.idc.com

Copyright and trademark notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, and web conference and conference event proceedings. Visit www.idc.com to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit idc.com/about/offices. Please contact IDC at customerservice@idc.com for information on additional copies, web rights, or applying the price of this document toward the purchase of an IDC service.

Copyright 2026 IDC. Reproduction is forbidden unless authorized. All rights reserved.