



IDC MarketScape

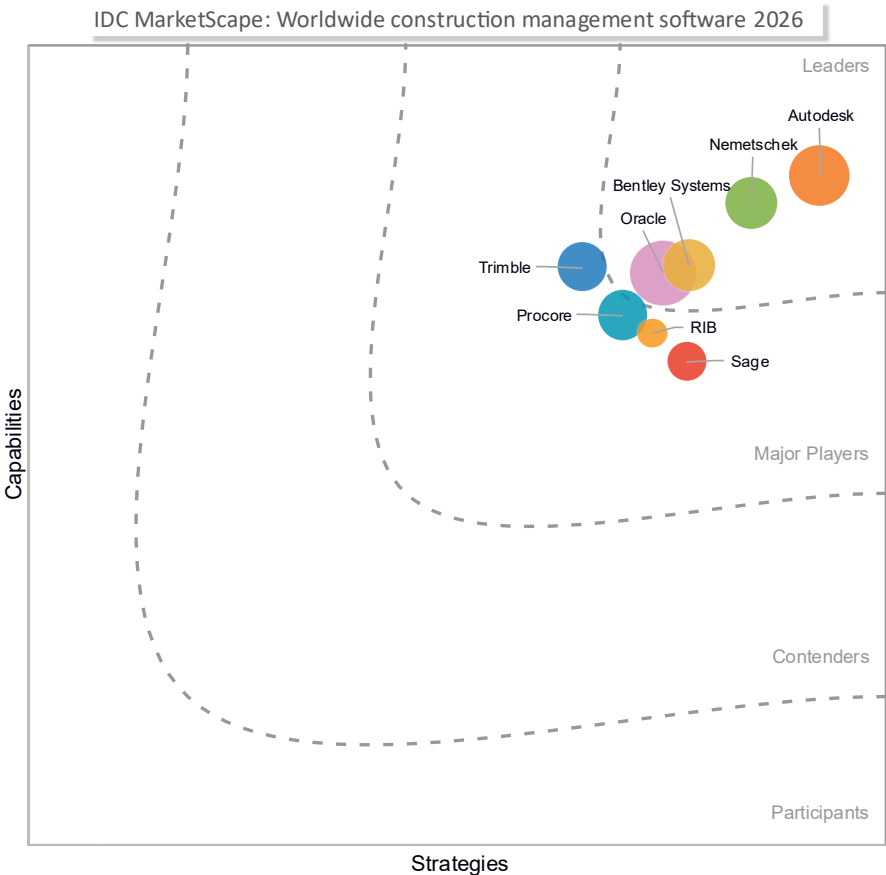
IDC MarketScape: Worldwide Construction Management Software 2026 Vendor Assessment

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THIS EXCERPT FEATURES NEMETSCHEK AS A LEADER
IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape worldwide construction management vendor assessment



Source: IDC, 2026

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 CO₂ 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 CO₂ 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.

Nemetschek

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

Munich, Germany-based Nemetschek Group is a global provider of software and AI solutions for the AEC industry, with 4,061 employees companywide, approximately 3,600 of whom support the AEC business. The company has served the industry for 63 years, maintaining profitability for more than two decades. Nemetschek's Build & Construct Division is its fastest-growing segment, delivering 41% year-over-year growth from 2024 to 2025. Growth has been led by North America, supported by the performance of Bluebeam, GoCanvas, and SiteDocs; EMEA also contributed through brands including NEVARIS and 123onsite, while Nemetschek continues to expand its presence in APAC. Nemetschek brings together a portfolio of 13 brands across four divisions: Planning & Design, Build & Construct, Operate & Manage, and Media & Entertainment — combining specialized domain expertise across the building life cycle with a strategic commitment to open standards and interoperability. The Planning & Design division includes ALLPLAN, dRofus, dTwin, Graphisoft (including Archicad), RISA, Solibri, and Vectorworks; the Build & Construct division includes Bluebeam, HCSS, GoCanvas (including SiteDocs), and NEVARIS (including 123onsite); the Operate & Manage division includes Crem Solutions and Spacewell; and the Media & Entertainment division includes Maxon.

Build & Construct, the focus for this report, comprises four brands: Bluebeam (including Revu, its flagship PDF markup, measurement, document management, and collaboration product), GoCanvas (no-code field data capture, including SiteDocs for safety and compliance), Nevaris (construction-specific software for estimating, tendering, billing, commercial control, financial accounting, payroll, cost accounting, materials and equipment

management), and the 123onsite mobile site-management tool. Adjacent brands outside the formal Build & Construct division but relevant and integrated to the construction life cycle include dRofus (a structured requirements-management and data-management platform for briefing, room/space and equipment planning), Solibri (a BIM quality-assurance and model-checking platform, including clash detection), and dTwin (an open, cloud-based digital-twin platform for visual analytics and connected intelligence across built assets). It is a varied collection of offerings that covers the construction life cycle, although not completely unified on a single data model, and is supported by a commitment to open standards, OpenBIM, as well as product-specific APIs and interoperability.

Bluebeam is the flagship product for Nemetschek's building-construction footprint, and one that repeatedly came up in a positive light during customer interviews. Nemetschek anticipates Build & Construct growth of at least 12% over the next 1–2 years, with a particular focus on infrastructure projects, datacenter construction, SMB expansion, and field-centric workflows. This, combined with the recent acquisition of HCSS, is an indication that Nemetschek intends to extend its reach beyond its traditional building/vertical-construction base and into infrastructure/horizontal territory in the near future.

Nemetschek invests significantly in R&D (24% of revenue in 2024) with more than 300 full-time employees (FTEs) dedicated to AEC innovation, organized around five pillars: AI, OpenBIM/open standards, venture investments, M&A of disruptive technologies, and academic research partnerships (notably the Georg Nemetschek Institute at the Technical University of Munich). A key recent (2026) product development is Bluebeam Max, a new AI-powered subscription tier that includes Smart Review and Smart Overlay capabilities, alongside MCP-based agentic integration with Claude to enable AI-assisted workflows in Revu.

Strengths

- Suite of products that support the entire construction life cycle: planning and design, BIM coordination and validation, preconstruction, document-centric collaboration, field data capture, construction commercial workflows, and building operations.
- Strong cross-team collaborative capability with document/PDF management platform Bluebeam, which enables connectivity from design through project and field data collection (Go Canvas). Bluebeam is often used alongside many of the other vendors profiled in this report.
- 24% R&D reinvestment rate, focused on optimization of data flow between its products, as well as leveraging AI to improve data access, analytics, and decision-making during projects.

Challenges

- Supplier/contractor-network, bid management, and project risk modeling are less developed than cost estimation and quantity takeoff capabilities.
- Its strength in the breadth of its suite of products can also be a challenge: each product is run as its own business and thus requires configuration, integration, and consistent data openness.
- BIM integration (to preconstruction & project management) was cited by customers as average/not best-in-class, which will become increasingly important for complex building and infrastructure projects.

Consider Nemetschek when

You want to work with a very experienced team of construction experts with knowledge of the entire life cycle, from design through operations, complemented by a suite of products with notable expertise in document collaboration that integrates seamlessly with field data collection and communication.

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 #lcUS54430426, 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.

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