Report Impression
European Contractor Monitor H2-2024
Digitalisation and BIM

February 2025

USP Marketing Consultancy

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Digitalisation and BIM

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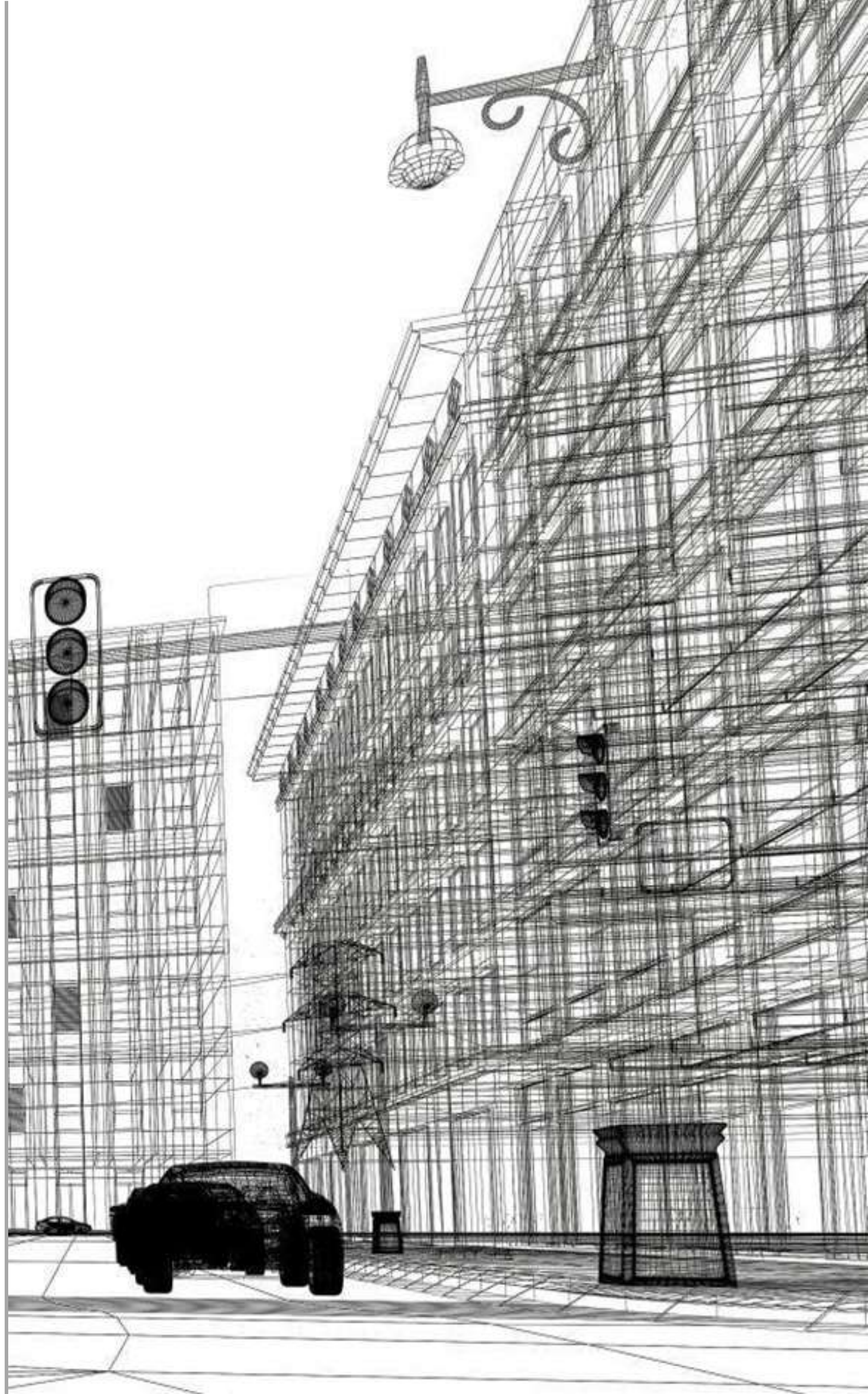

About European Contractor Monitor – BIM

THE GOAL

To gain a comprehensive understanding of the economic landscape in the construction market among building contractors across Europe and to uncover the most significant trends impacting these companies, USP initiated the European Contractor Monitor in 2018. This research is conducted bi-annually, involving registered building contractors from eight major European markets: the Netherlands, Germany, the UK, France, Spain, Italy, Belgium and Poland.

THE RESEARCH TOPICS

Recurring topic: Economic developments of building contractors in Europe (order book and turnover development)

Biannual theme topics in 2024:
H1: Prefab
H2: Digitalisation and BIM

COUNTRY SCOPE

Total of 940 Phone interviews

Background characteristics of the interviewed respondents can be found in the country-specific profiling the contractor chapter.

THE TIMELINE

Report H1-24
July '24

Report H2-24
January '25

PROJECT TEAM

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Research Consultant
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Background characteristics

Company profile
How many full-time employees does your company have?

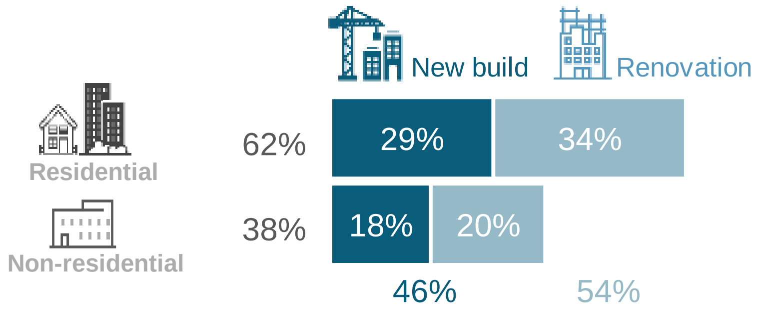
5-15 FTE	≥16 FTE
58%	42%

Average age

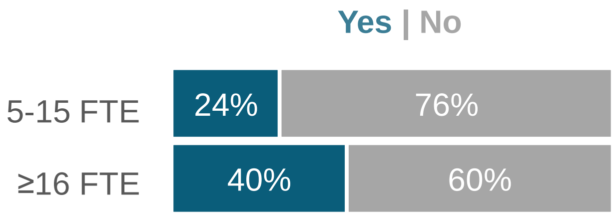
48

≤34	35-44	45-54	55-64	≥65	No answer
13%	28%	35%	20%	4%	1%

Project segmentation
What percentage of your residential/ non-residential turnover do you get from new build projects?



Does your company develop and build projects themselves?



Actual total N = 951; 5-15 FTEs N = 547 16+ FTEs N = 404

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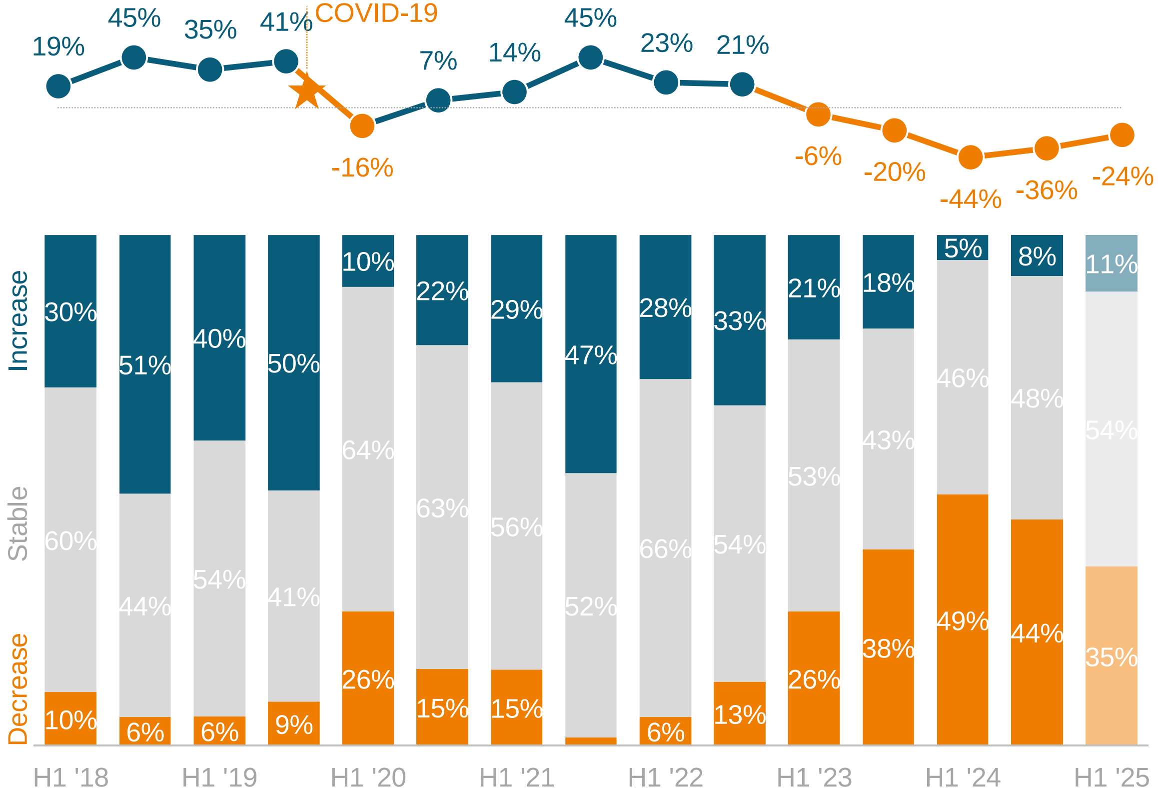
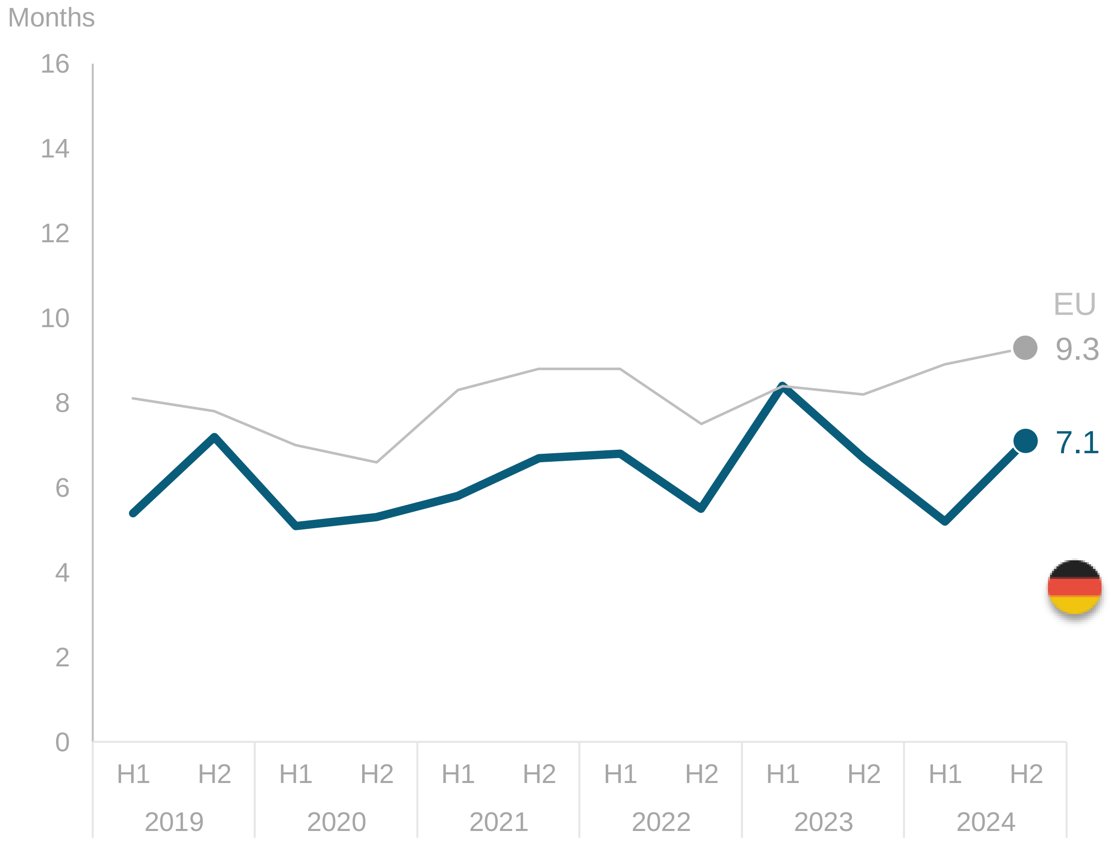
Despite an upward trend, more German contractors have seen a negative turnover development. Order portfolio increased slightly in the past 6 months

Net share of contractors' experience regarding turnover
If you compare your turnover of H2-24 to H2-23, how did your turnover develop?
What are your expectations for the development in H1-25 compared to H1-24?

Balance: Share of contractors reporting INCREASE minus the share of contractors reporting DECREASE



Order book in months
For how many months will you be able to keep your current staff working?

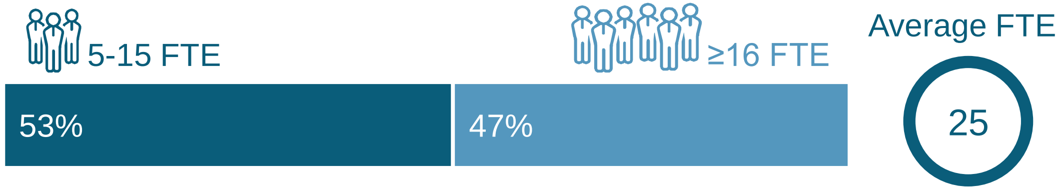


*Results are weighted: Actual total N=126; 5 – 15 FTE N=67; 16+ FTE N=59.

Background characteristics

Company and respondent profile

How many full-time employees does your company have?



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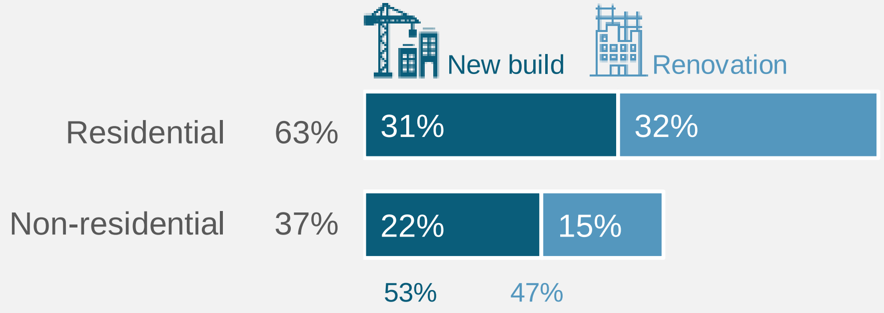
Average age

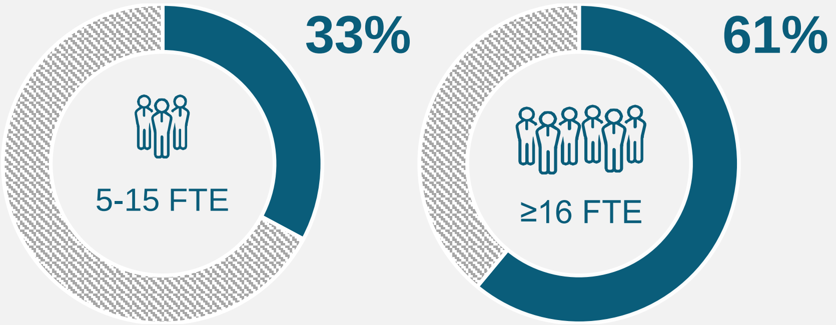
<35	35-44	45-54	55-64	≥65
6%	27%	54%	12%	2%

Project segmentation

What percentage of your turnover do you get from new build projects?



Develop and build projects themselves



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Research questions **TREND part of this study (BIM & Digitalisation)**

WHY BIM & DIGITALISATION AS KEY TRENDS TOPIC

The construction industry is changing. Trends like prefab, labor shortage, and new (house) builders entering the construction market with their own design and engineering capacity impact the role of the traditional building contractor. It is essential to monitor the developments of BIM & digitalization, as they significantly enhance project efficiency, collaboration, and cost-effectiveness throughout the construction lifecycle.

THE RESEARCH QUESTIONS

General questions regarding BIM

- *Are you familiar with the term BIM, Building Information Modeling? And do you use it?*
- *What is the share of projects in which BIM is used? What percentage of the turnover comes from BIM projects?*
- *When did your company started to work with BIM? When will your company start using BIM?*
- *Why did your organization start using BIM? Why is your organization not (yet) started with using BIM?*
- *What do you consider the greatest advantages of BIM?*
- *What do you consider to be the greatest limitations or pain points for BIM?*
- *In what type of projects (building types) is BIM used the most?*

In-depth usage of BIM

- *Which other parties do you already cooperate with using BIM processes in your projects?*
- *Which of the following features of BIM do you use?*

(125)

Business development

The general turnover development in Europe is positive, with a few exceptions. Contractors in most European countries had a better turnover in H2 this year than in H2 last year. The exceptions are the contractors in Germany (negative) and France (neutral).

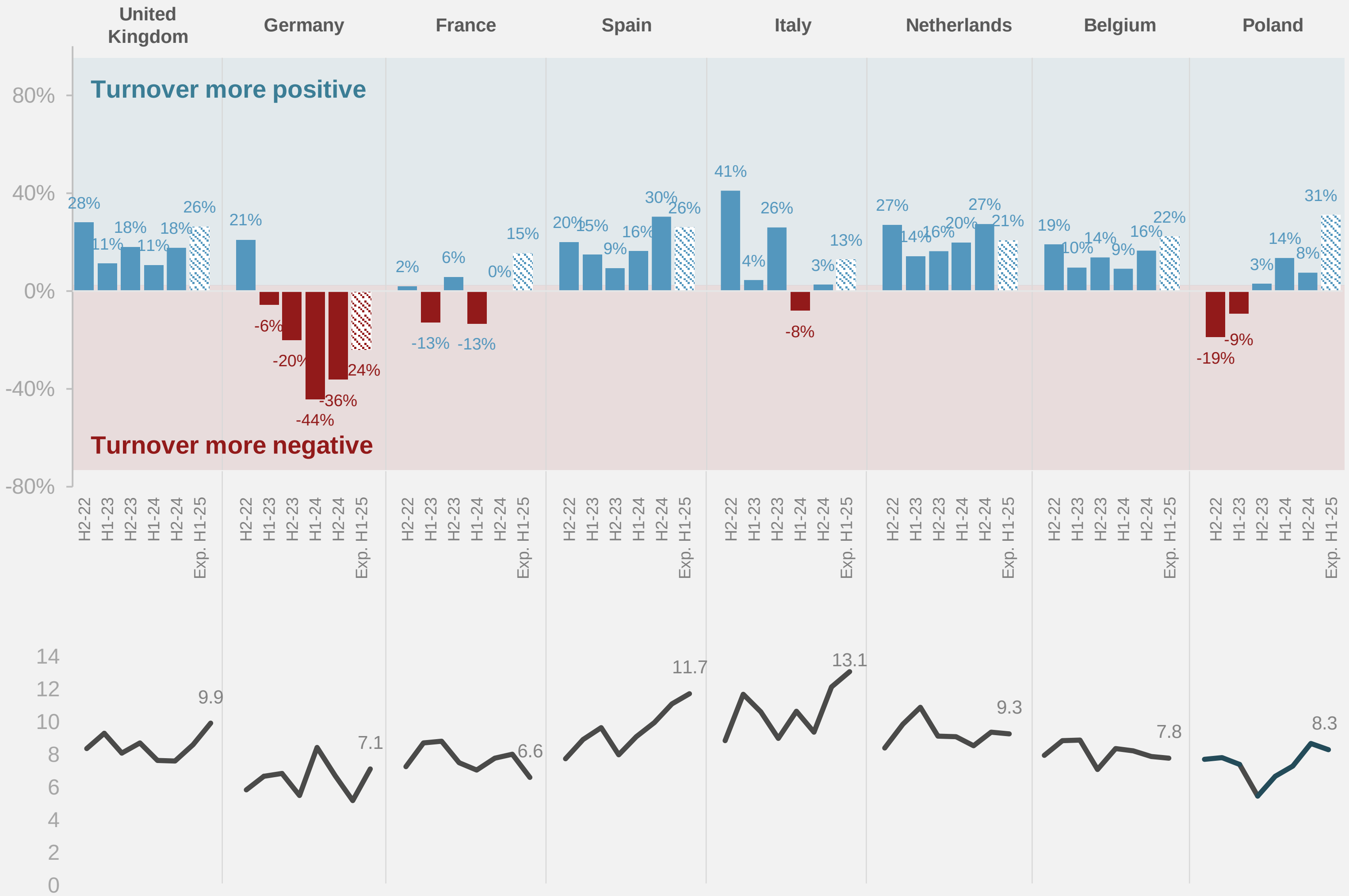
The expectations for H1 are better than last year and more positive than the realised turnover in H2. This is especially the case in Poland. Even contractors in France and Italy, who had, on average, a neutral H2 compared to last year, are now, on average, more positive about their turnover for H1.

The only difficult market seems to be Germany. For almost two years, turnover development and expectations have been negative. This is also seen in other USP Monitors, such as the European Architectural Barometer.

The positive expectations for H1-2025 can be a direct effect of the increase in the order book in many countries. Contractors have projects for many more months, so they are confident that the turnover for H1 will be positive.

A few trends that could hinder a positive development are the economic development in a country, the availability of personnel (labour shortage) or the adoption of new technologies (like prefab and BIM).

Net share of contractors' experience regarding turnover



Order book portfolio in months

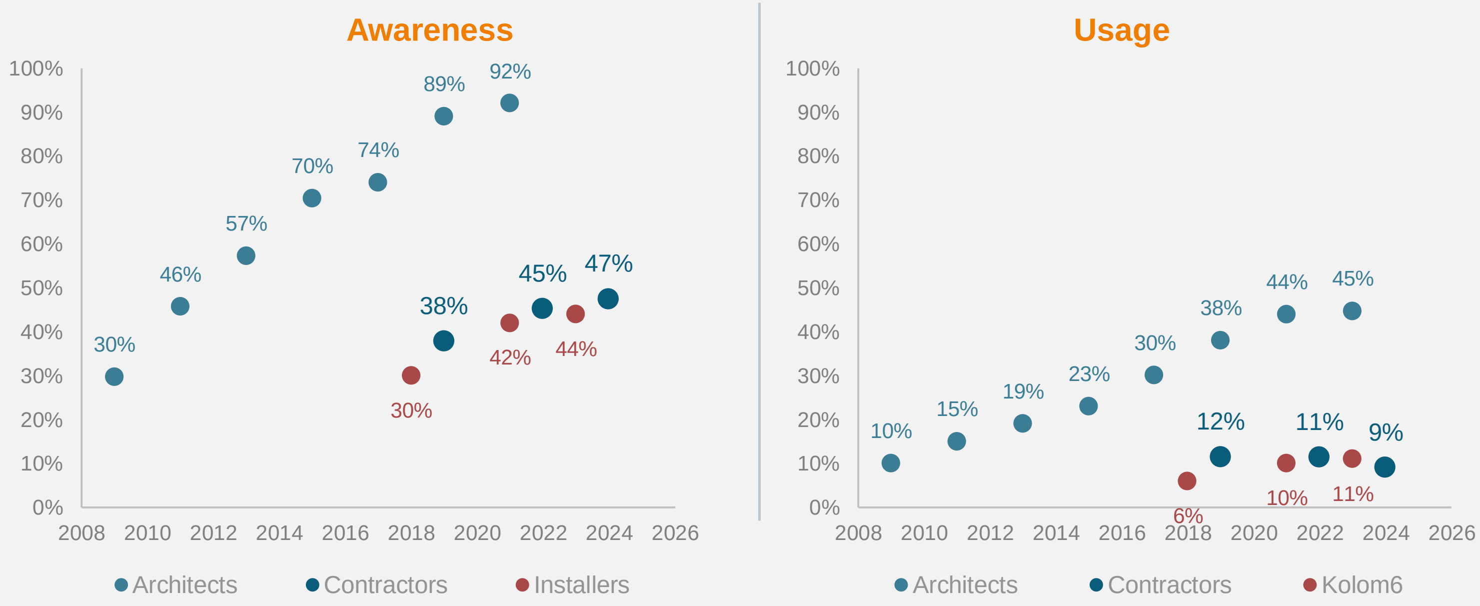
BIM in comparison with other stakeholders

BIM is slowly becoming more common in the construction industry. Architects have known this way of working for a long time, and every architect knows the concept by now. From a contractor's perspective, almost half of them know BIM. This is similar to other stakeholders from the value chain: the electrical and mechanical (HVAC) installers.

The usage of BIM seems to stagnate a bit , a trend we see among all target groups. Among architects, half of those who know BIM also use BIM. For contractors, it is more like every fifth contractor who knows BIM also uses BIM. This means that approximately 10% of all contractors in Europe use BIM. We do see differences per country, and we will also explain the reasons for stagnation.

Trend in awareness and usage of BIM

Are you familiar with the term BIM, Building Information Modeling? And do you use it?



BIM awareness and usage throughout the years

On average, 47% of the European contractors know BIM, and 10% use BIM. There are big differences throughout Europe, with the Netherlands leading in awareness (79%) and usage (42%). The awareness and usage is lowest in Poland. What is also striking is the increase in awareness in Germany from 19% in 2022 to 43% in 2024. The main reason for this is the fact that since the end of 2022, BIM has become mandatory for public building projects. This has boosted the awareness but not the usage yet; not every contractor works in the public sector.

When looking at the usage of BIM amongst contractors we see that the Netherlands has been the leading country since the beginning (looking at the start date). The same pattern we saw among architects. We also see that contractors first start to follow the architects, but the expectation USP has that at some time in the future contractors will take over the leading role of architects. The main reason for this is that BIM has many more features that will benefit contractors more than architects. This will also differ per country: in Germany, the architect's role is bigger throughout a construction project than in the Netherlands.

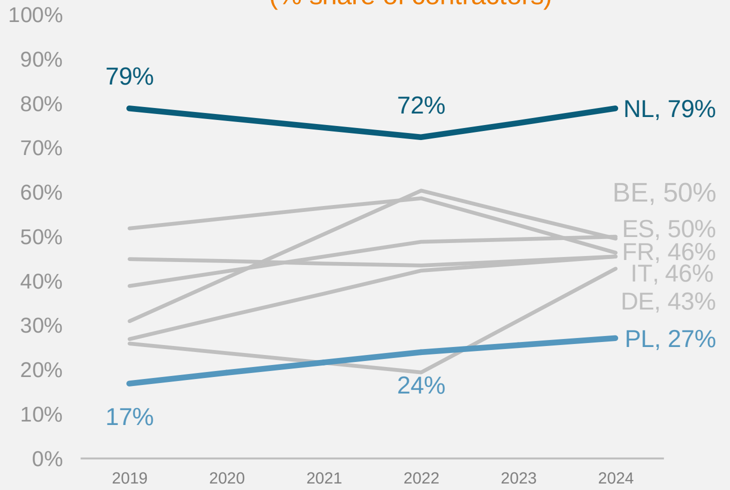
Those contractors that use BIM, use it in most of their projects, e.g. 58% in the Netherlands.

Trend in awareness and usage of BIM

Are you familiar with the term BIM, Building Information Modeling? When did your company started to work with BIM? / When will your company start using BIM? What is the share of projects in which BIM is used?

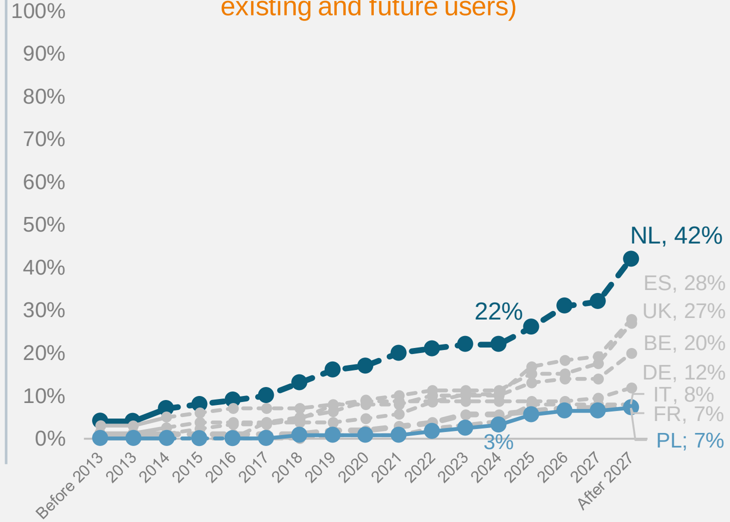
Awareness

(% share of contractors)

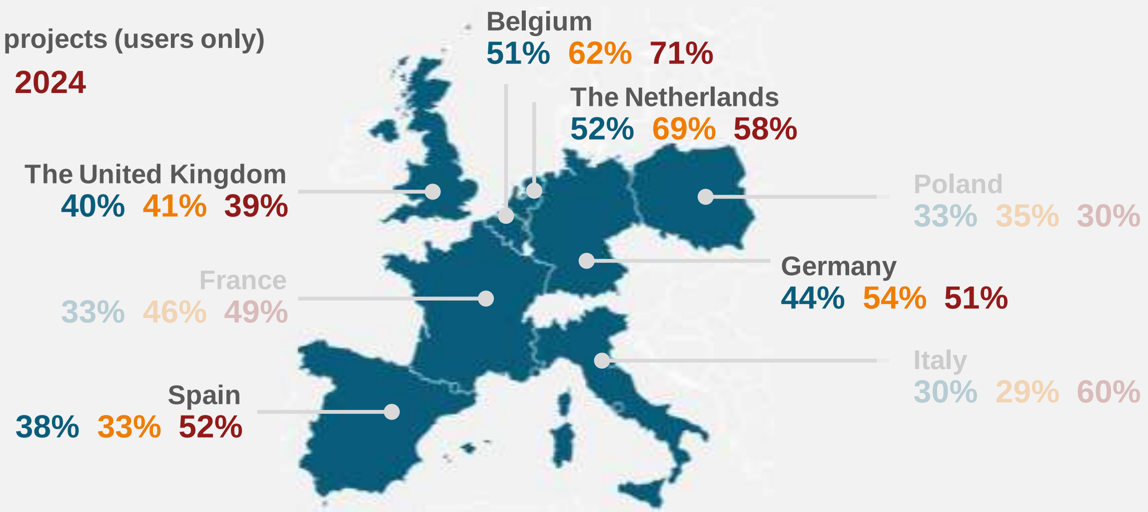


Usage

(% share of contractors, based on start date of existing and future users)



Share of BIM projects (users only)



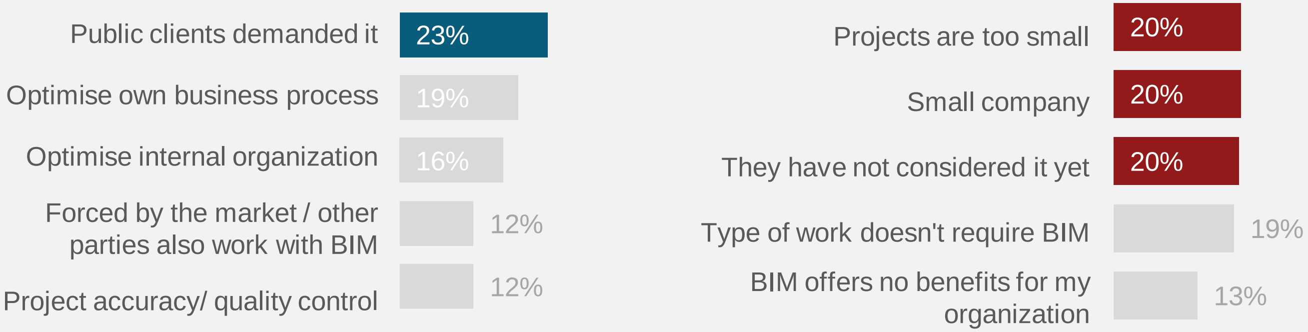
(Dis)advantages of BIM

The main reasons for contractors to start using BIM can be external, forced by (public) clients (like in Germany) or by other stakeholders, or they can be internal: to optimise their own business process or internal organisation. The main reasons not to start using BIM mainly lie in the company's size or the project's size.

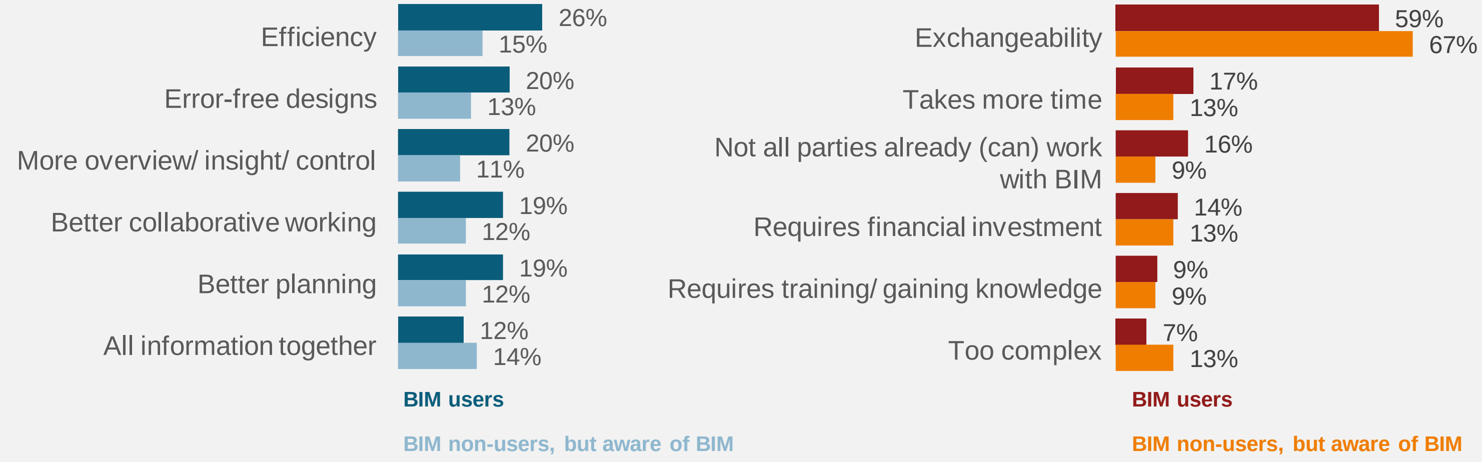
When looking at BIM's advantages and pain points, there are no big differences between the users and non-users (who do know BIM). It turns out that the experienced advantages (of BIM users) are bigger than the expected advantages (of BIM non-users). This means that BIM is more beneficial than anticipated.

Regarding the pain points, one hinders contractors the most: exchangeability. This mainly has to do with the fact that not all stakeholders in a project are working with BIM or in BIM. We saw that only 10% of main stakeholders, like contractors, electrical installers, and mechanical installers, use BIM. This makes it difficult for contractors who do work in BIM to find suitable partners: they will have to find workarounds to solve this issue.

Reasons for (not) using BIM
Why did your organization **start using BIM**? Why is your organization **not (yet) started** with using BIM?



(Dis)advantages of BIM
What do you consider the greatest **advantages of BIM**? What do you consider to be the **greatest limitations or pain points for BIM**?



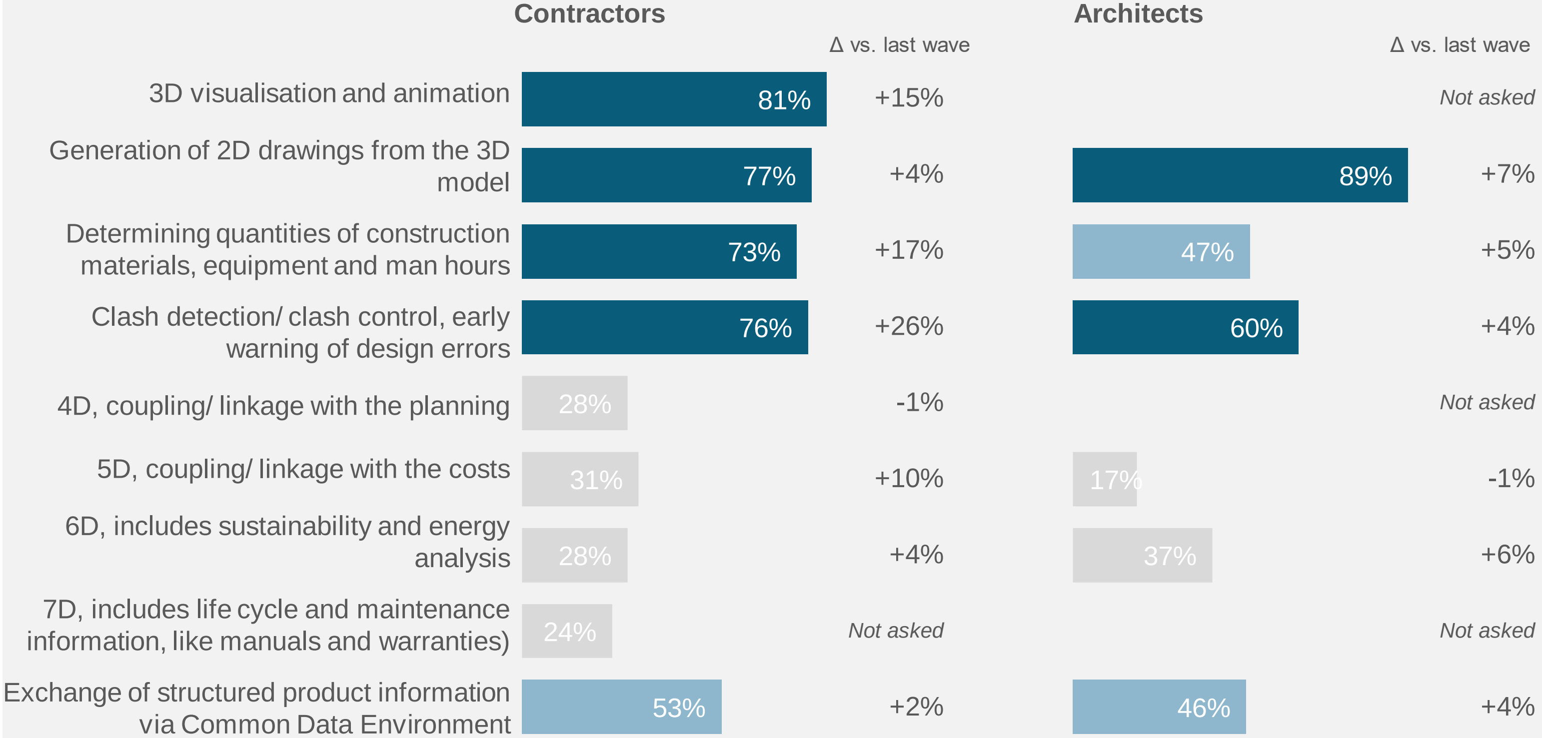
Possibilities of BIM

The features BIM can offer that are used the most by contractors are mainly design-related: 3D visualization, generating 2D drawings, and clash detection. These features are also mostly used by architects, and the usage of these features by contractors has increased as well compared to two years ago. One other, more typical contractor feature, is also used a lot: determining quantities of materials, equipment and man hours. A feature that is less relevant to architects, since it affects contractors' activities more.

The full potential of BIM is not met yet, since the linkage with 4D (planning), 5D (costs), 6D (sustainability) and 7D (life cycle management) is not used by many contractors. Maximum a third of all contractors that use BIM, make use of these features. These features are also more relevant for contractors than architects.

One of the benefits of BIM, which is not mentioned very often as an advantage, is that the failure costs are reduced. In those projects where BIM is not used, the average failure costs are 11,3% and when BIM is used the average failure costs are 7,0%. The failure costs can be reduced even further when features like 4D, 5D, 6D and 7D are used.

BIM features
Which of the following features of BIM do you use?



BIM and failure costs
Can you give a rough estimation of the failure costs in projects where …?

Features 4D, 5D, 6D, 7D are …

BIM is used: 7,0%

Used: 6,4% **Not used: 7,6%**

BIM is not used: 11,3%

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Management summary

Profiling the building contractor

Theme part: Digitalisation and BIM

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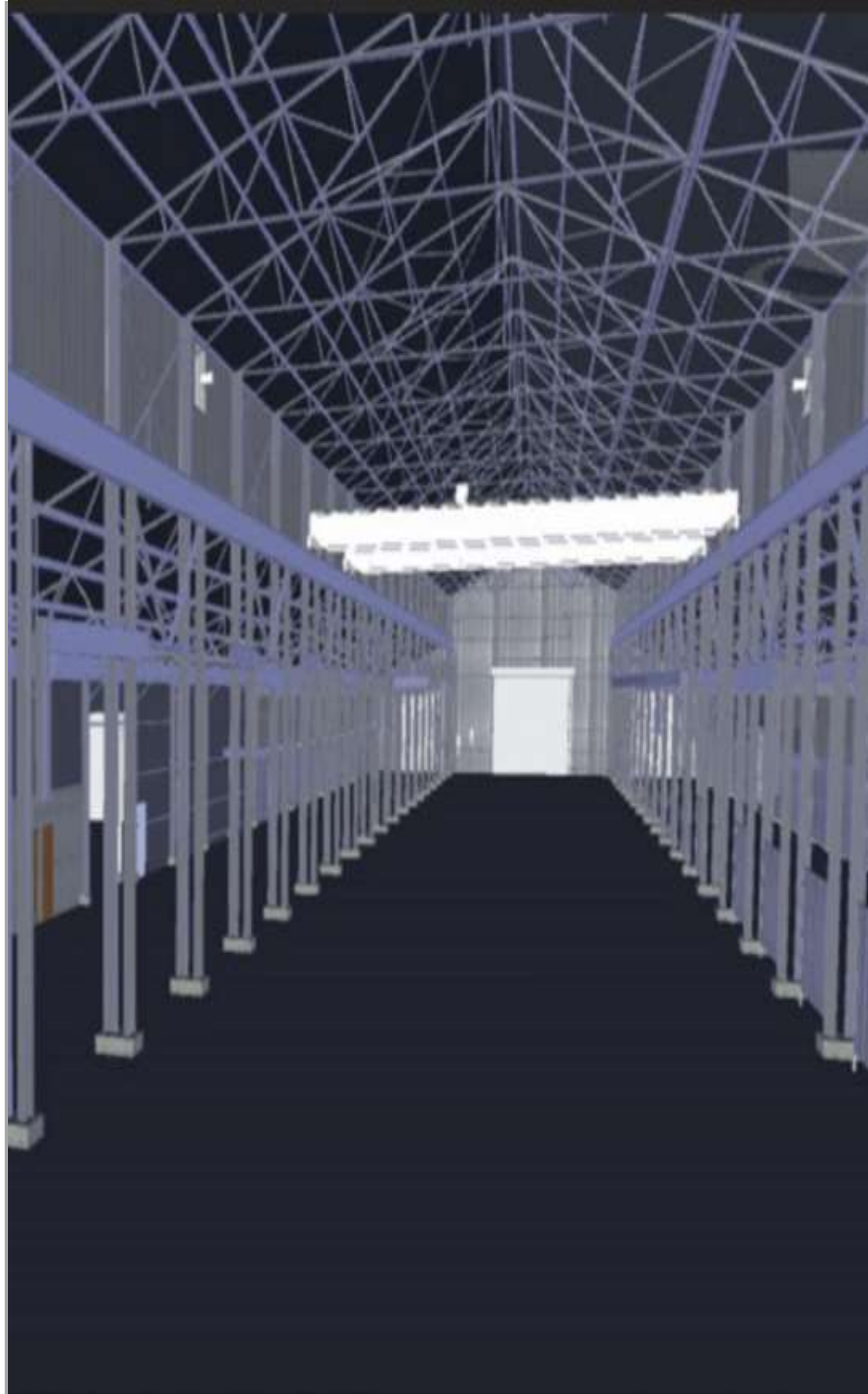
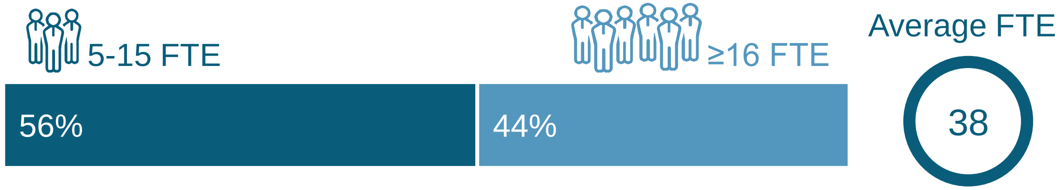


Background characteristics

Company and respondent profile

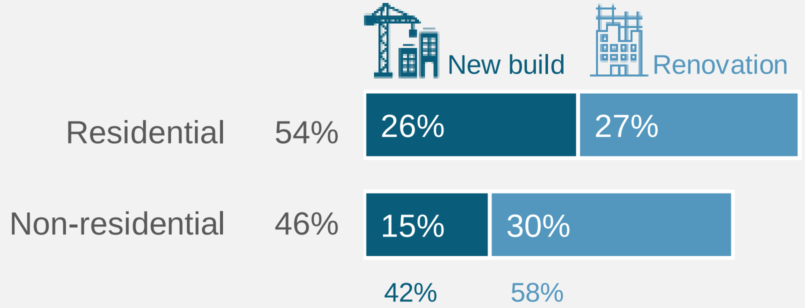
How many full-time employees does your company have?



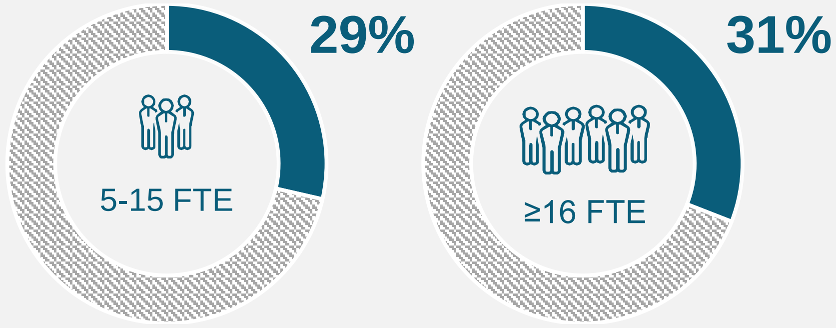
<35	35-44	45-54	55-64	≥65
12%	30%	27%	21%	8%

Project segmentation

What percentage of your turnover do you get from new build projects?



Develop and build projects themselves

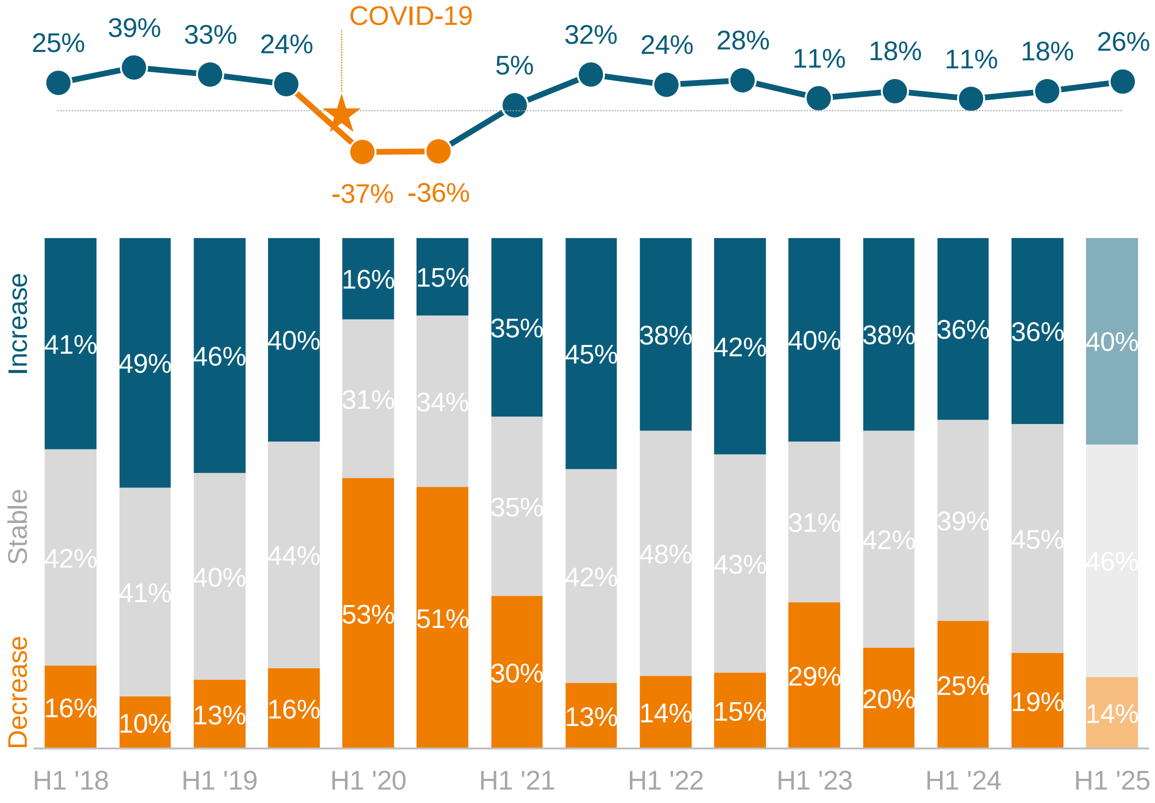


*Results are weighted: Actual total N=125; 5 – 15 FTE N=70; 16+ FTE N=55

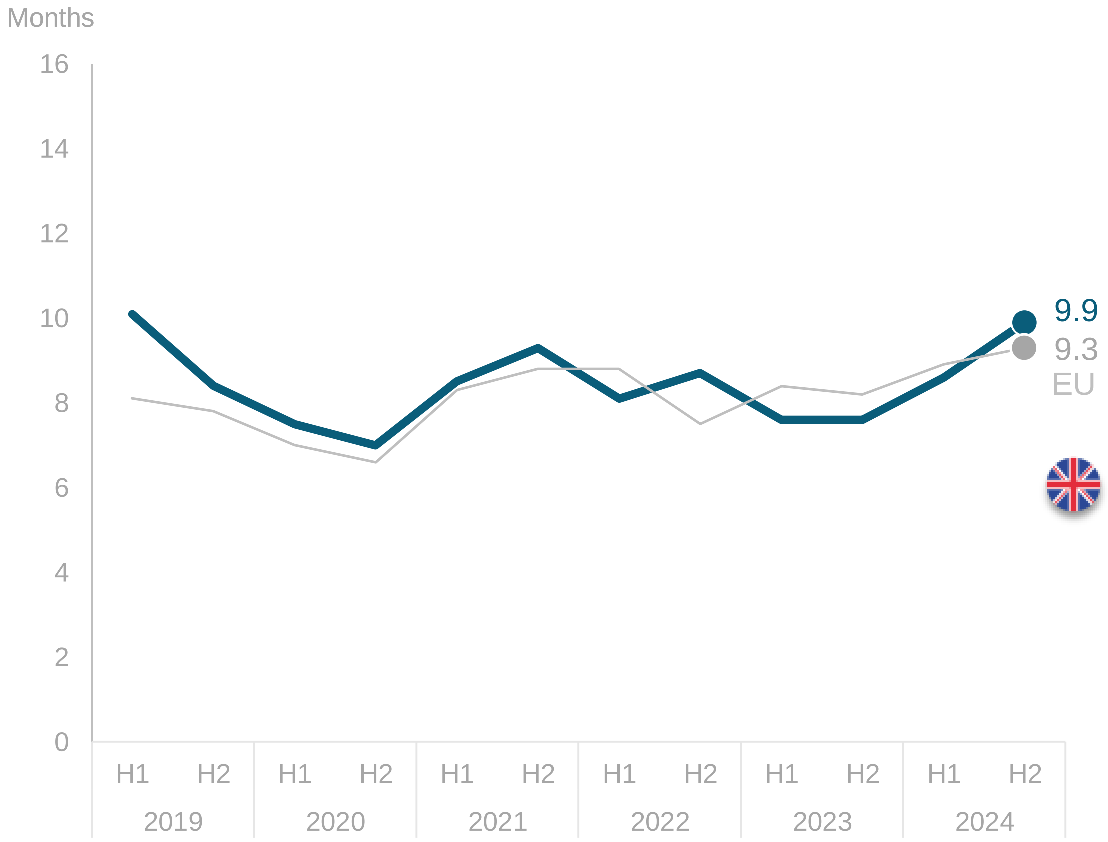
The development of the turnover and the order book portfolio in the UK has been quite stable over the past four years

Net share of contractors' experience regarding turnover
If you compare your turnover of H2-24 to H2-23, how did your turnover develop?
What are your expectations for the development in H1-25 compared to H1-24?

Balance: Share of contractors reporting INCREASE minus the share of contractors reporting DECREASE



Order book in months
For how many months will you be able to keep your current staff working?



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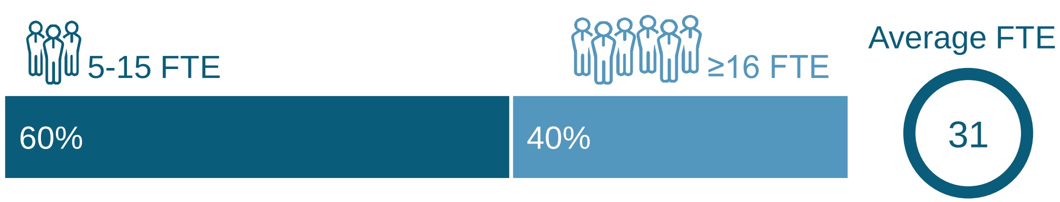

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Project segmentation

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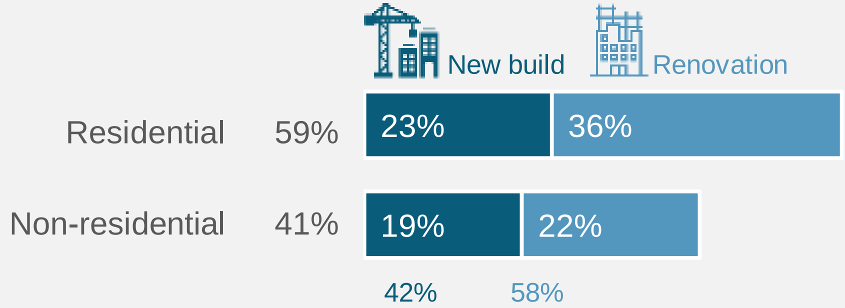
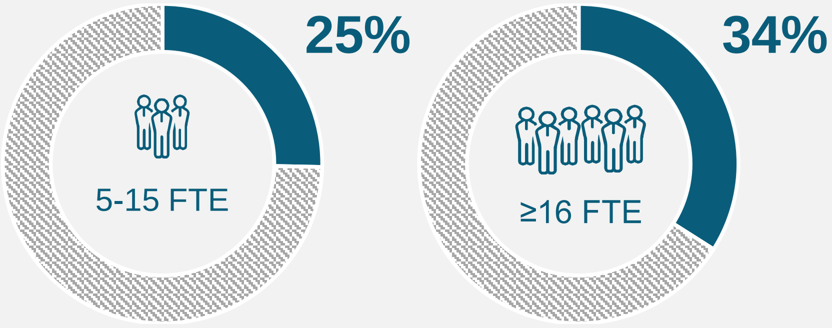


Develop and build projects themselves



*Results are weighted: Actual total N=125; 5 – 15 FTE N=75; 16+ FTE N=50.

The actual turnover of French contractors showed a brief dip in H1 2024, but the positive expectations they had for H2 were proven right

Net share of contractors' experience regarding turnover
If you compare your turnover of H2-24 to H2-23, how did your turnover develop?
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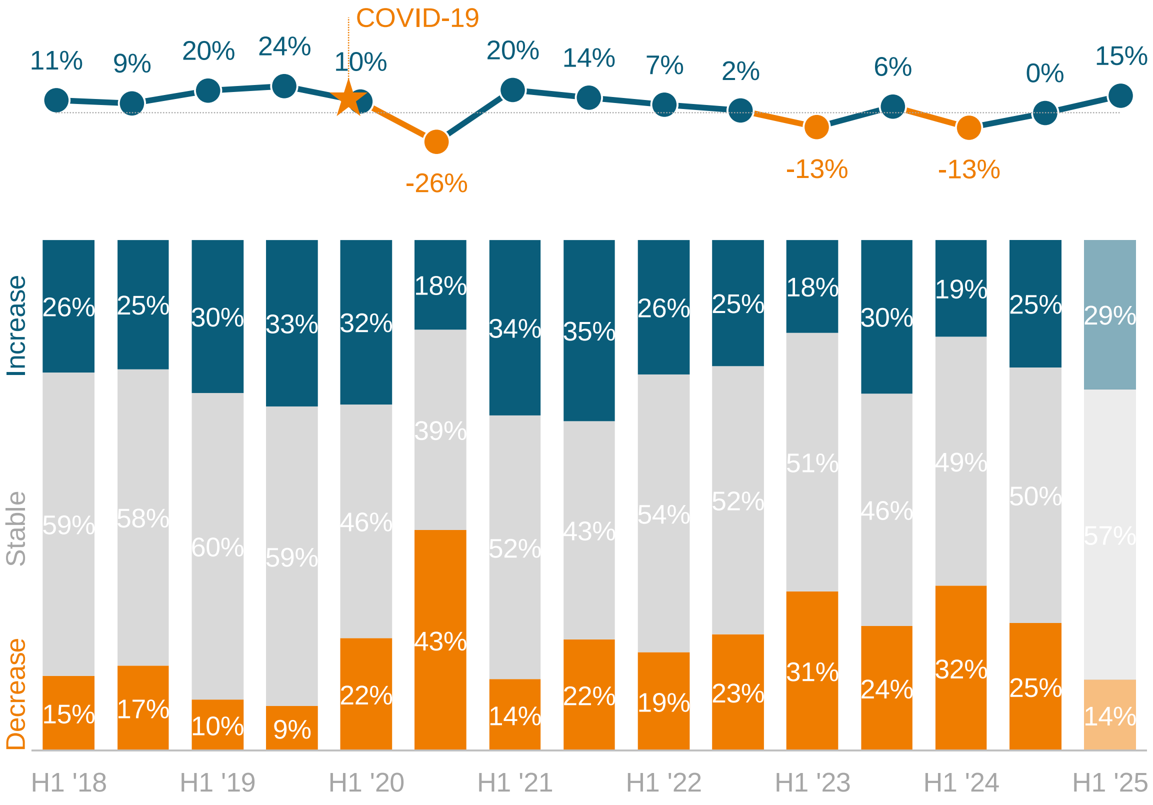

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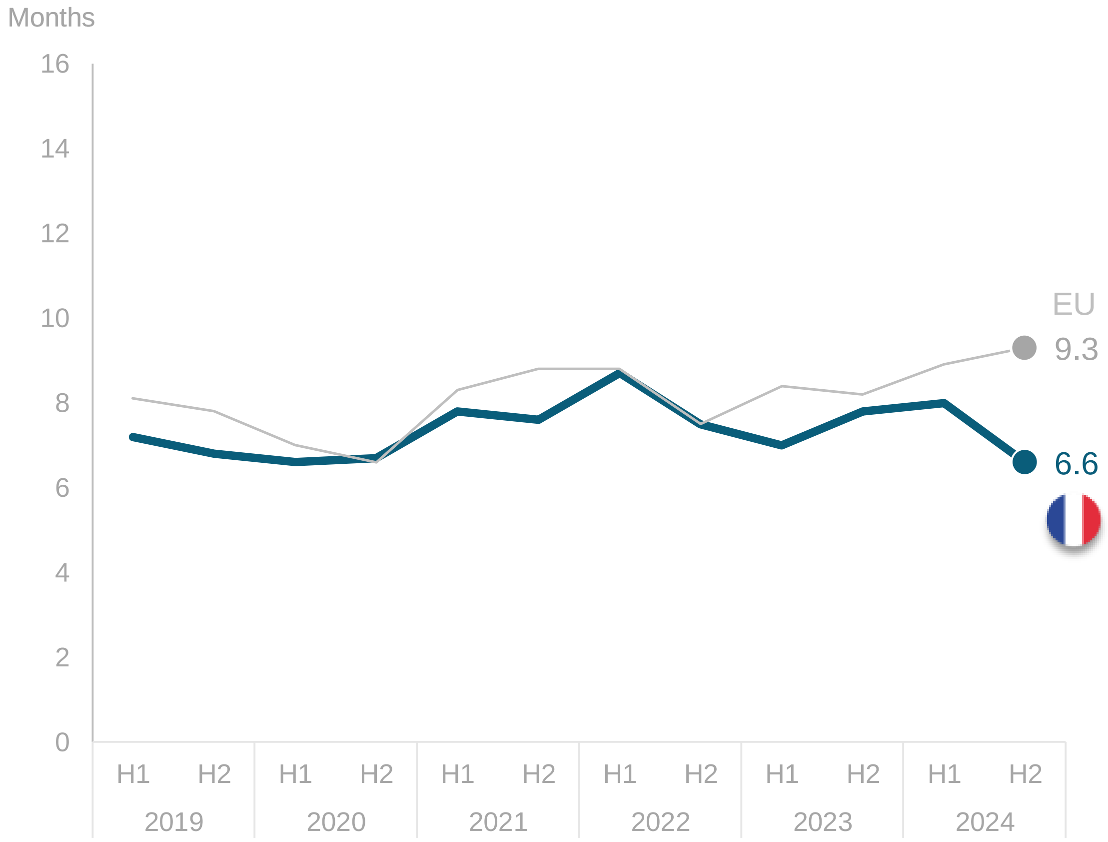

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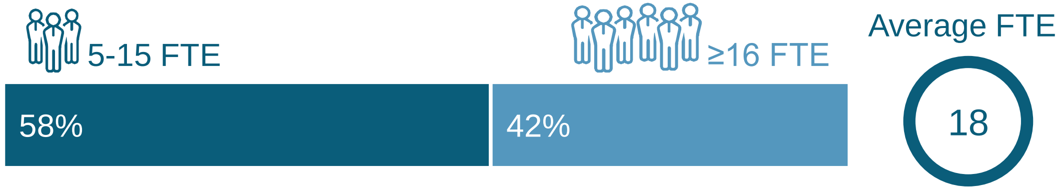

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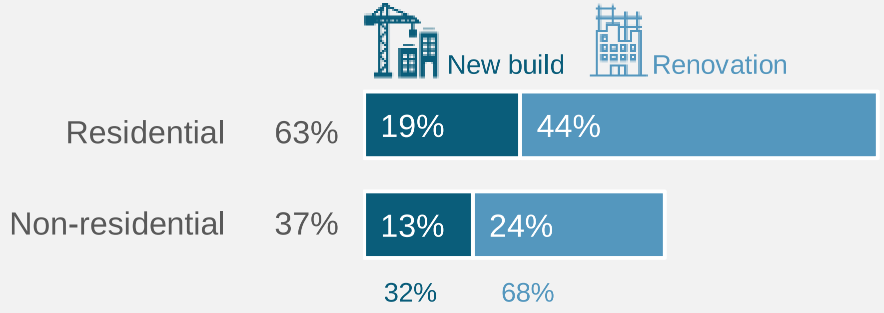

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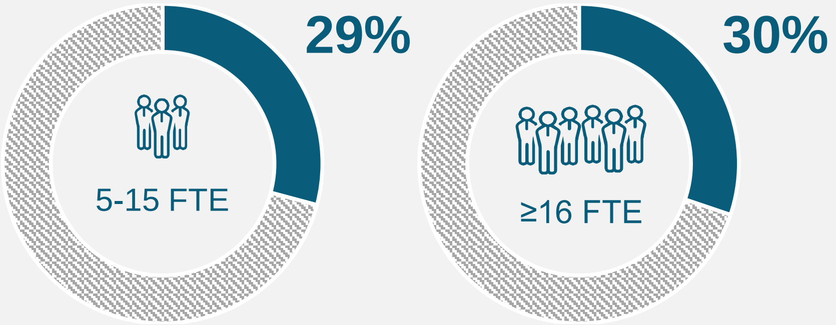

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Expectations from Italian contractors for H1 are again more positive than the actual turnover in present period, which could be caused by the increased order book

Net share of contractors' experience regarding turnover

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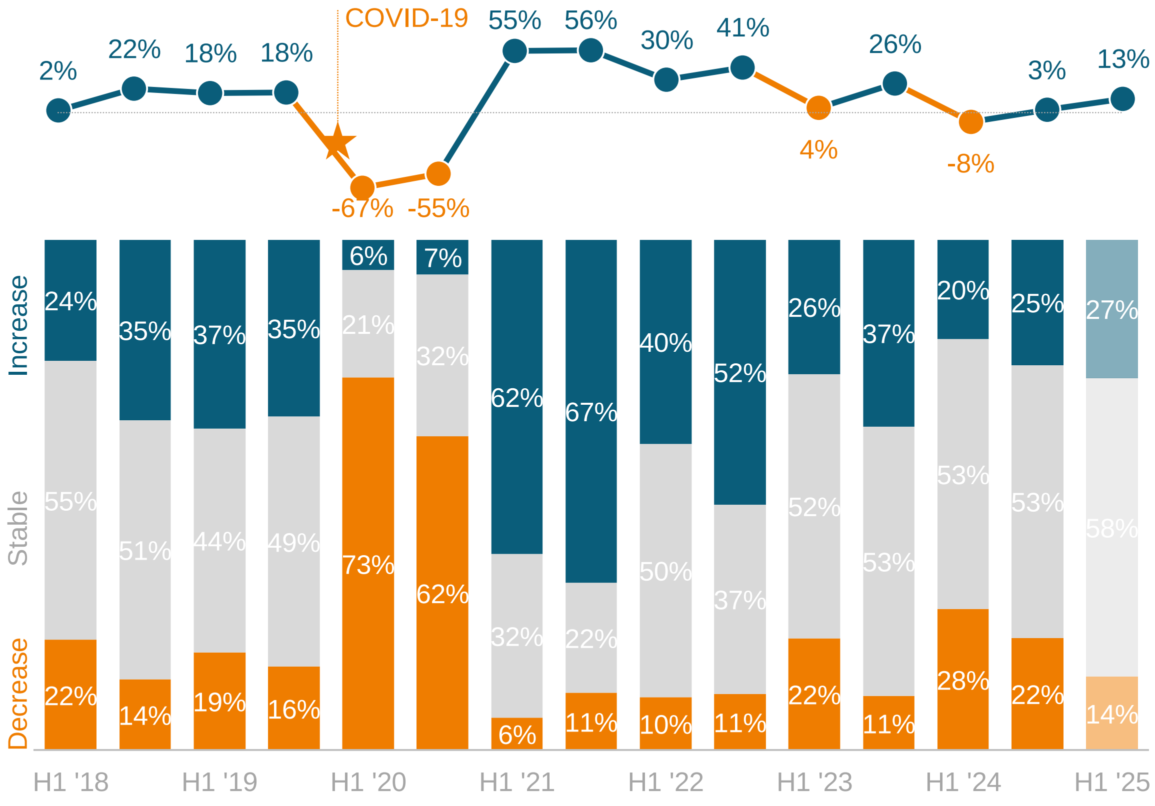

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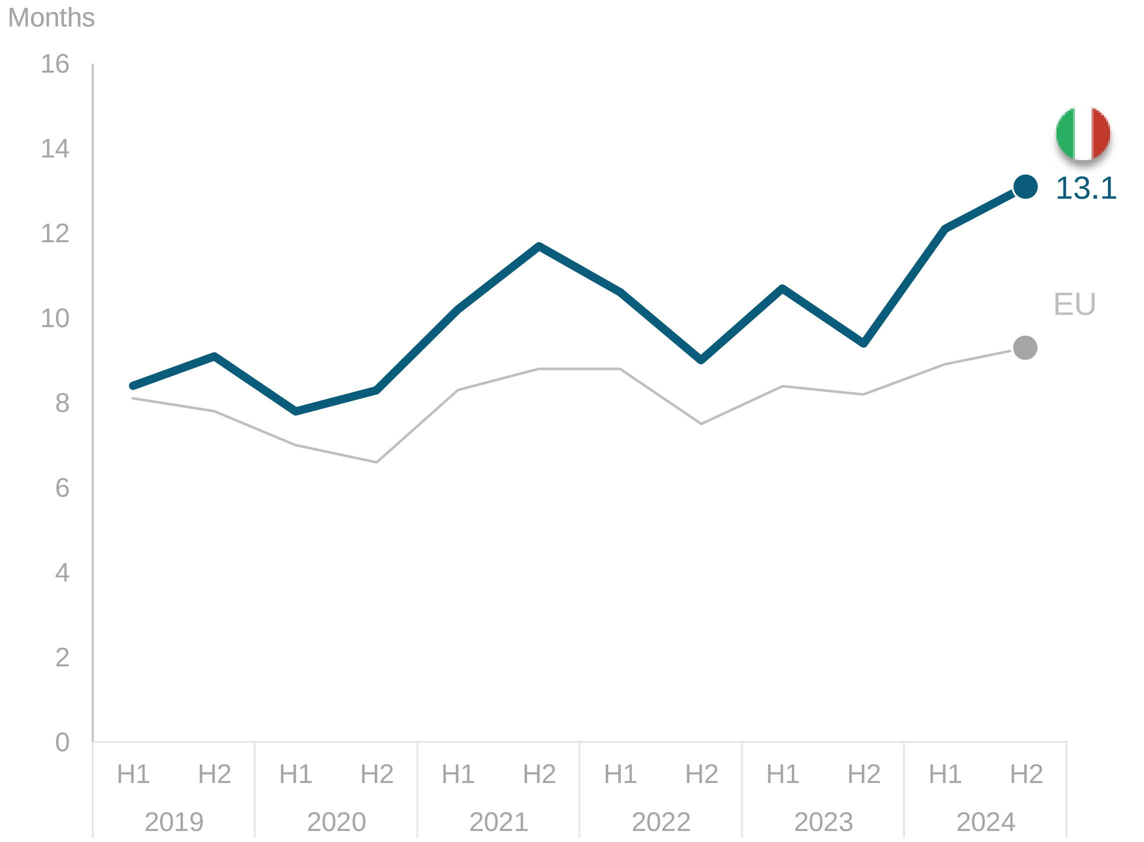

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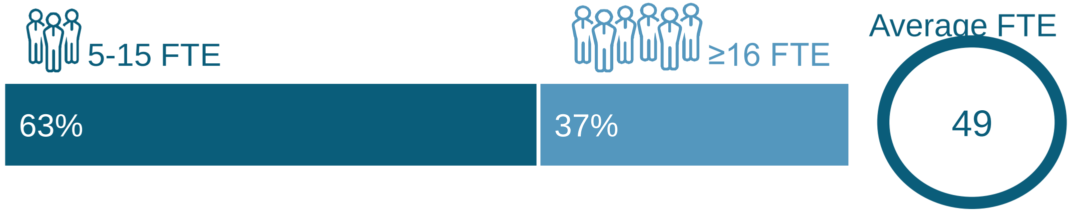

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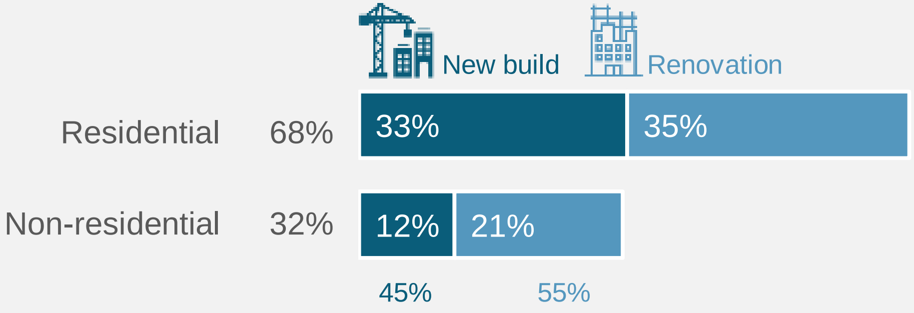
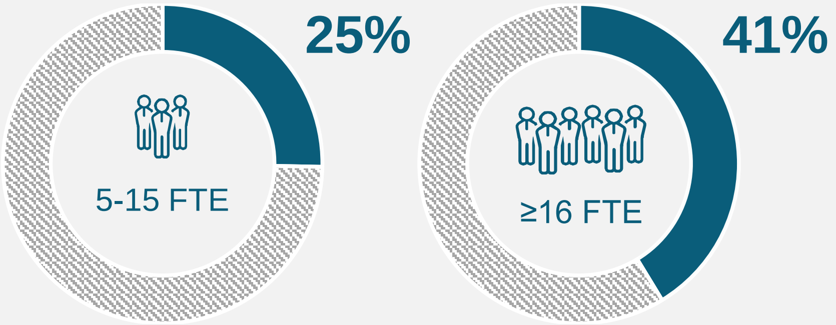


Develop and build projects themselves



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The turnover development of contractors in Spain is showing a similar upward trend as their order book

Net share of contractors' experience regarding turnover

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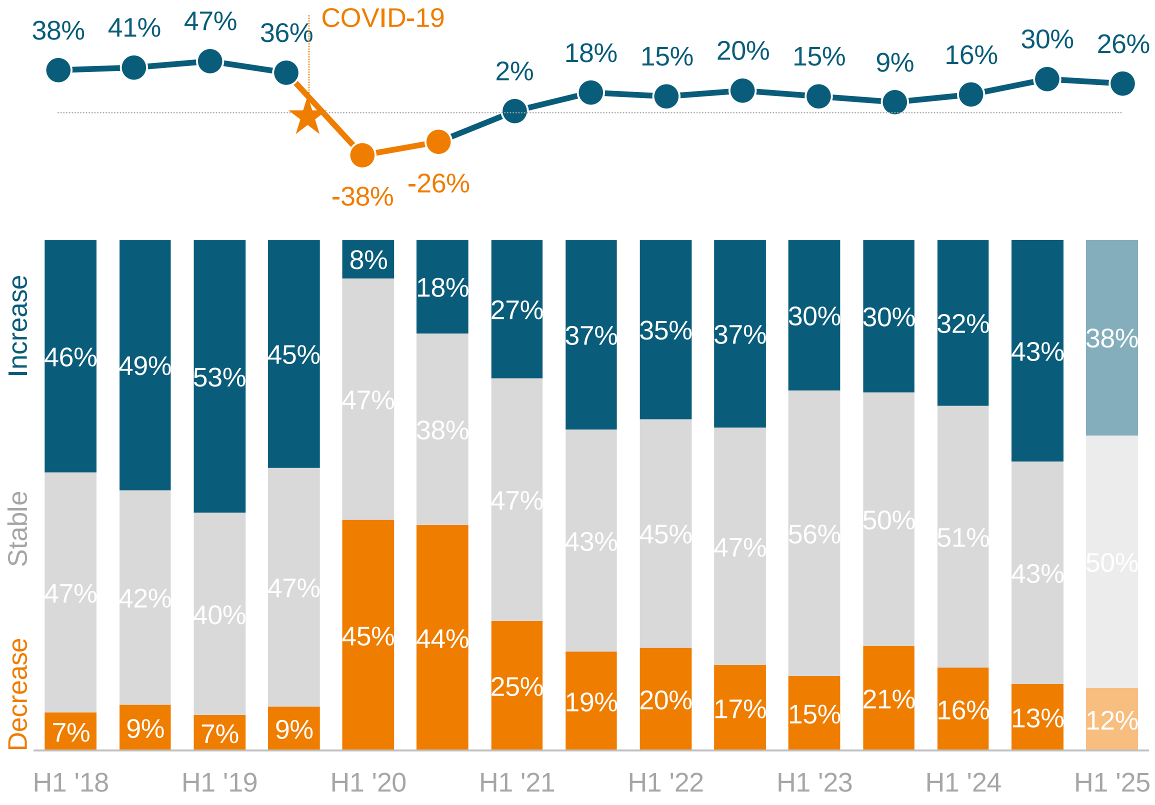

Order book in months

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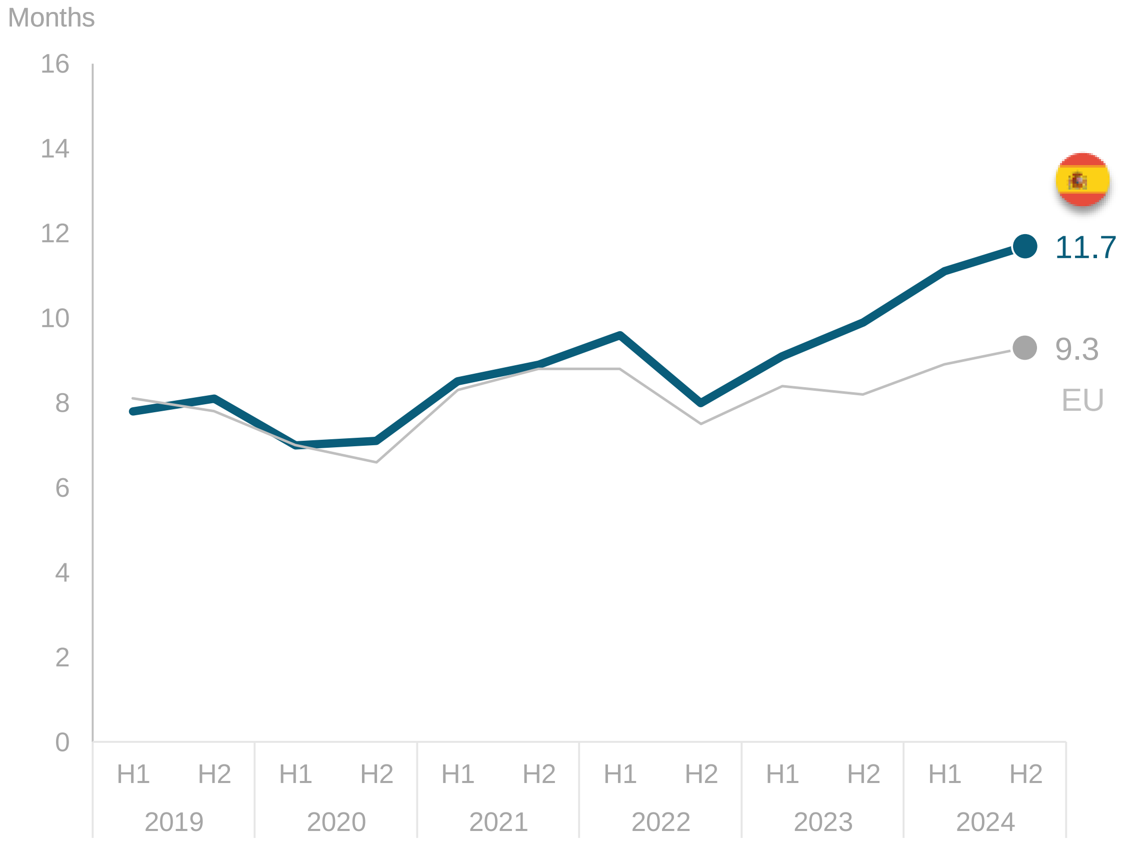

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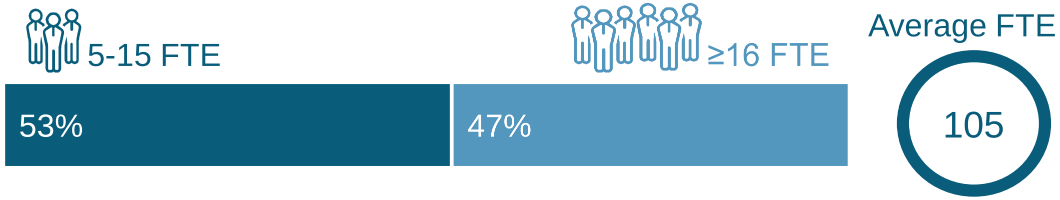

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Average age

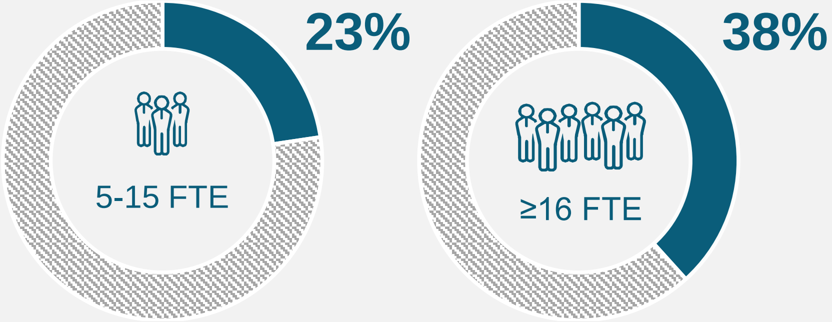
<35	35-44	45-54	55-64	≥65
11%	31%	24%	29%	5%

Project segmentation

What percentage of your turnover do you get from new build projects?

		New build	Renovation
Residential	70%	27%	42%
Non-residential	30%	15%	14%
		43%	57%

Develop and build projects themselves

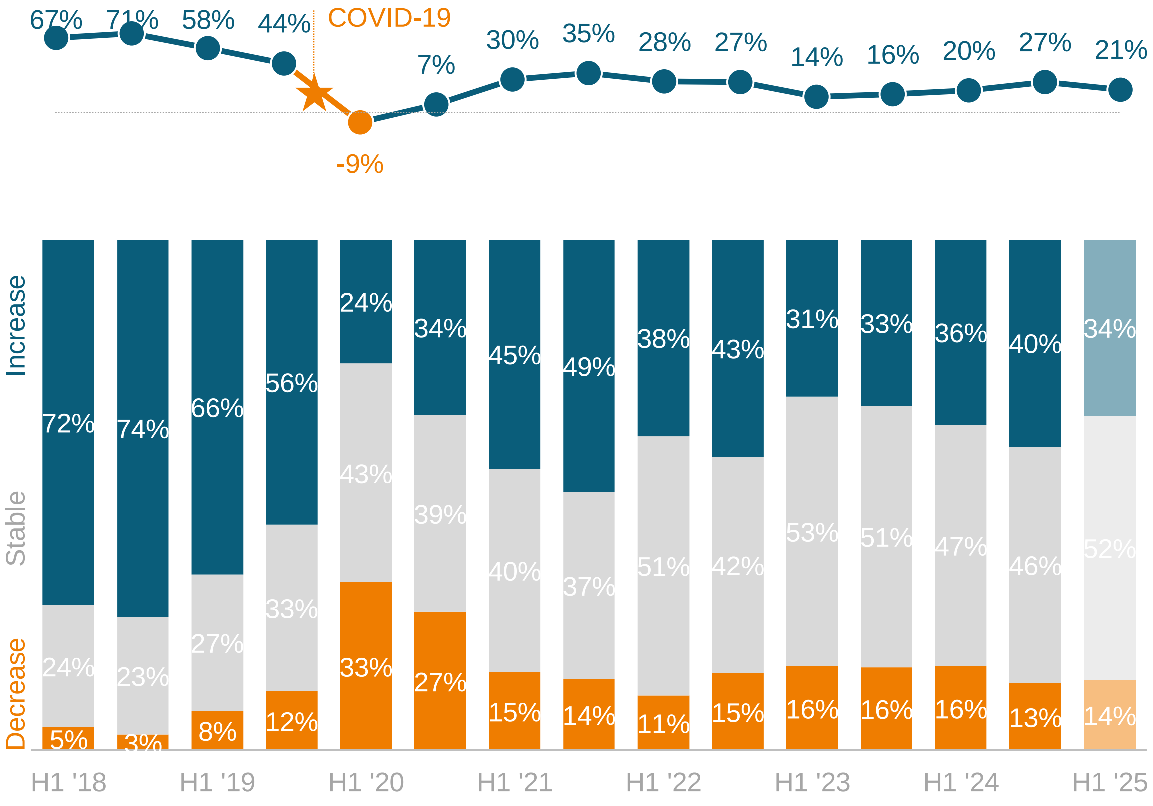


*Results are weighted: Actual total N=100; 5 – 15 FTE N=53; 16+ FTE N=47.

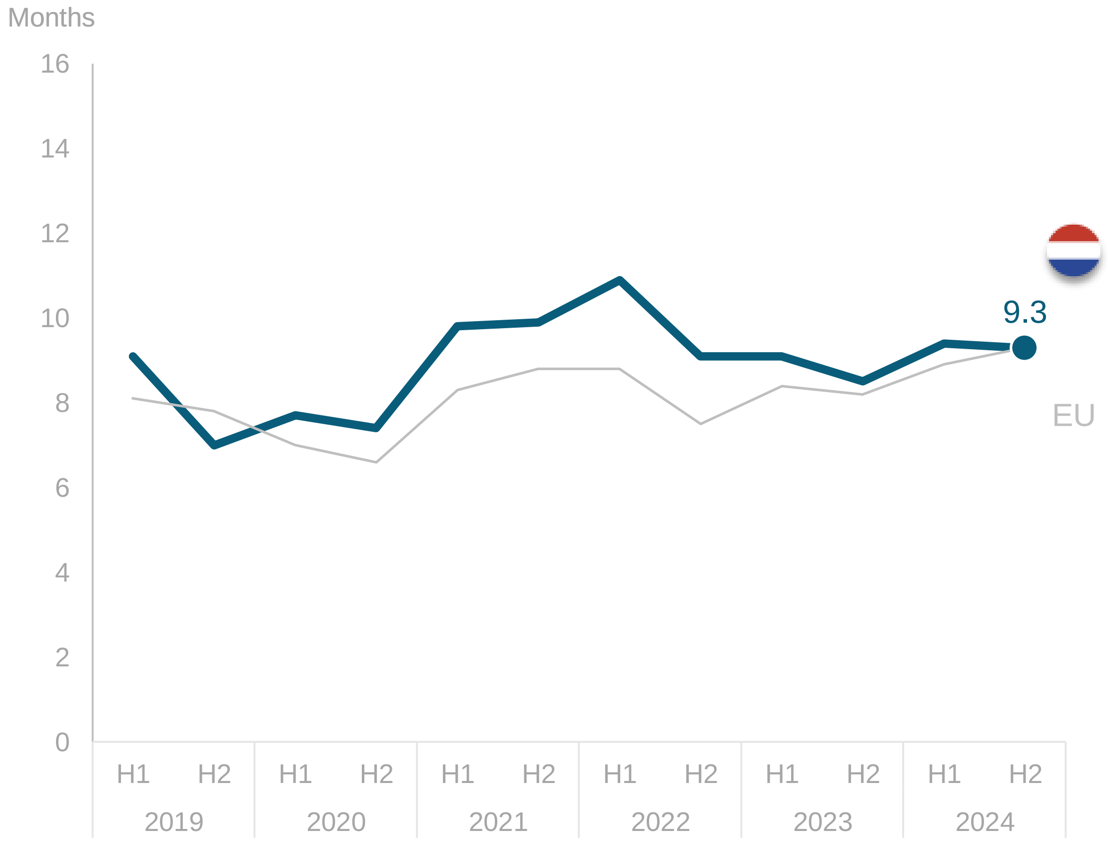
More contractors in the Netherlands see an increase of their turnover than contractors seeing a decrease, and the order book has also increased slightly

Net share of contractors' experience regarding turnover
If you compare your turnover of H2-24 to H2-23, how did your turnover develop?
What are your expectations for the development in H1-25 compared to H1-24?

Balance: Share of contractors reporting INCREASE minus the share of contractors reporting DECREASE



Order book in months
For how many months will you be able to keep your current staff working?

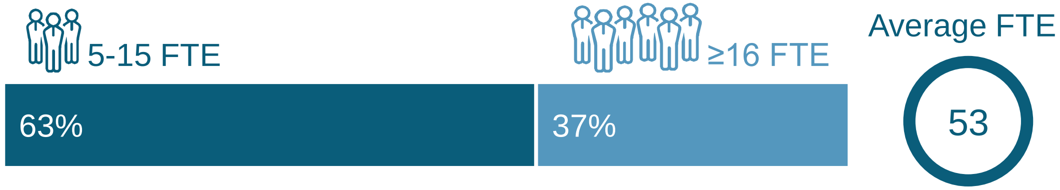


*Results are weighted: Actual total N=100; 5 – 15 FTE N=53; 16+ FTE N=47.

Background characteristics

Company and respondent profile

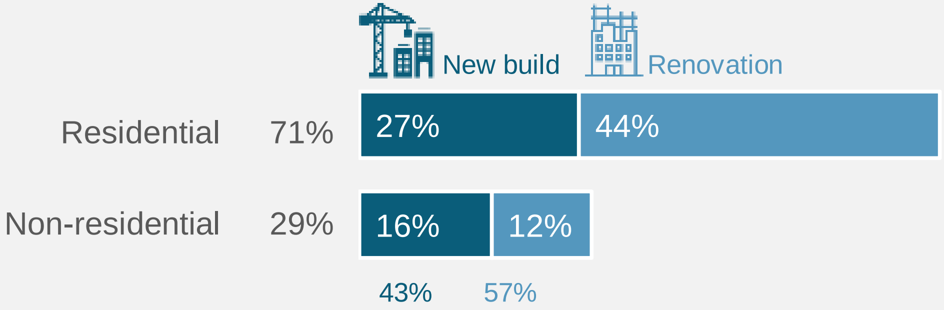
How many full-time employees does your company have?



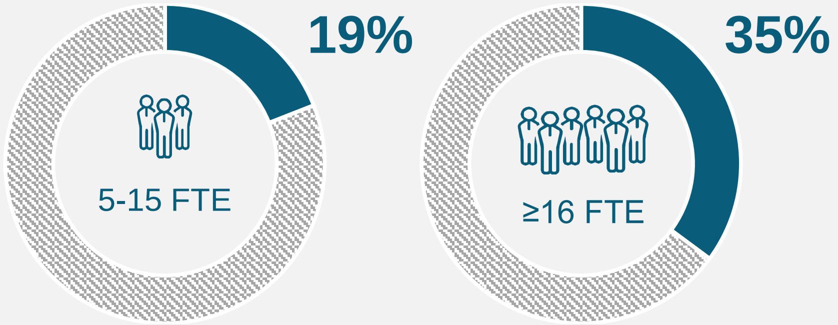
<35	35-44	45-54	55-64	≥65
24%	27%	28%	16%	4%

Project segmentation

What percentage of your turnover do you get from new build projects?



Develop and build projects themselves



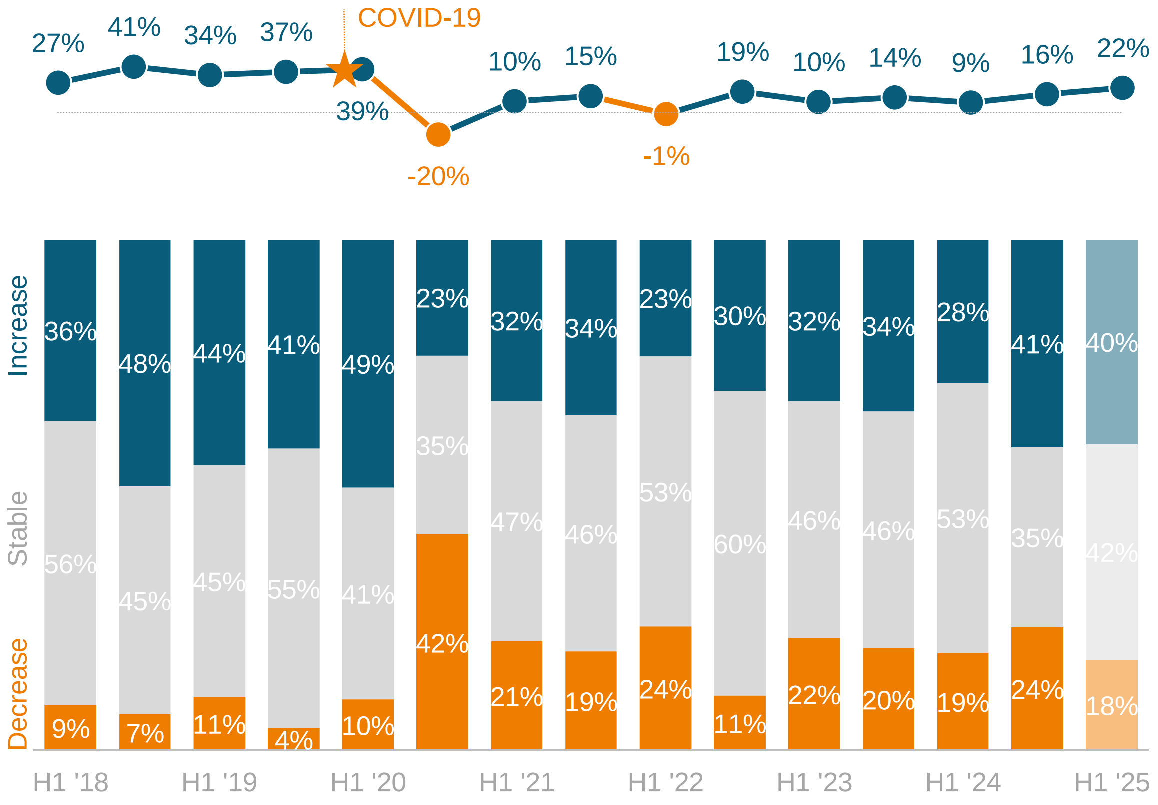
*Results are weighted: Actual total N=100; 5 – 15 FTE N=63; 16+ FTE N=37.

The current turnover of H2 was better than last years’ turnover in H2, and the expectations for H1 are at the same level

Net share of contractors’ experience regarding turnover

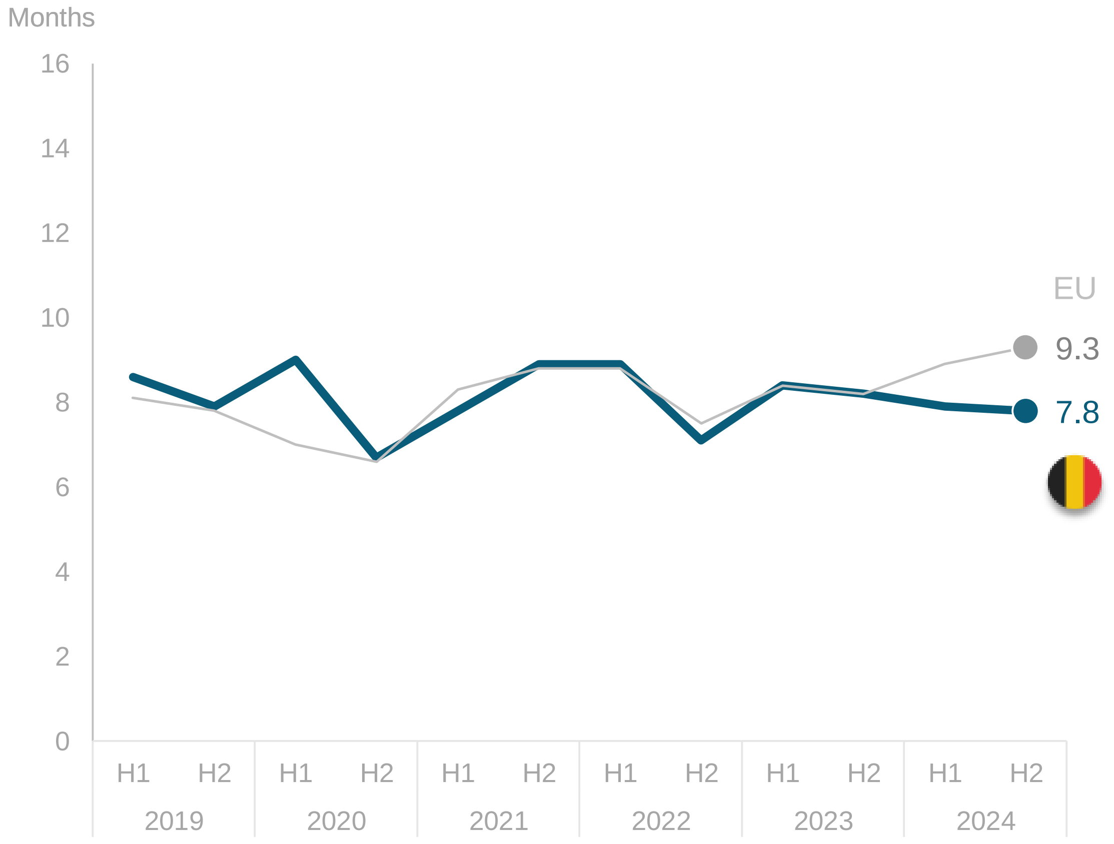
If you compare your turnover of H2-24 to H2-23, how did your turnover develop?
What are your expectations for the development in H1-25 compared to H1-24?

Balance: Share of contractors reporting INCREASE minus the share of contractors reporting DECREASE



Order book in months

For how many months will you be able to keep your current staff working?

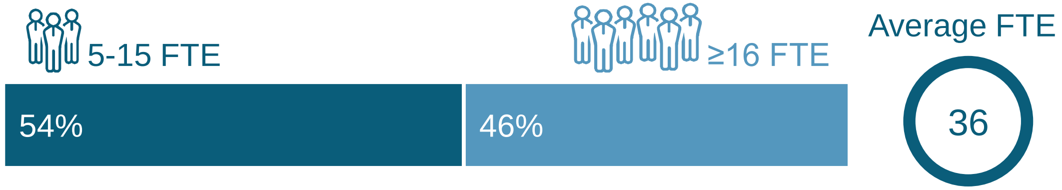


*Results are weighted: Actual total N=100; 5 – 15 FTE N=63; 16+ FTE N=37.

Background characteristics

Company and respondent profile

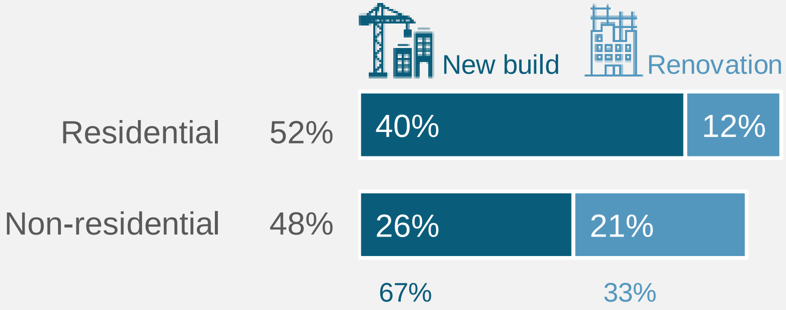
How many full-time employees does your company have?



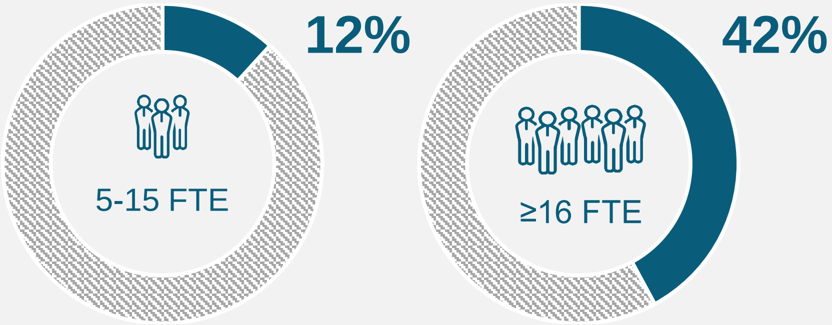
<35	35-44	45-54	55-64	≥65
9%	26%	35%	18%	10%

Project segmentation

What percentage of your turnover do you get from new build projects?



Develop and build projects themselves

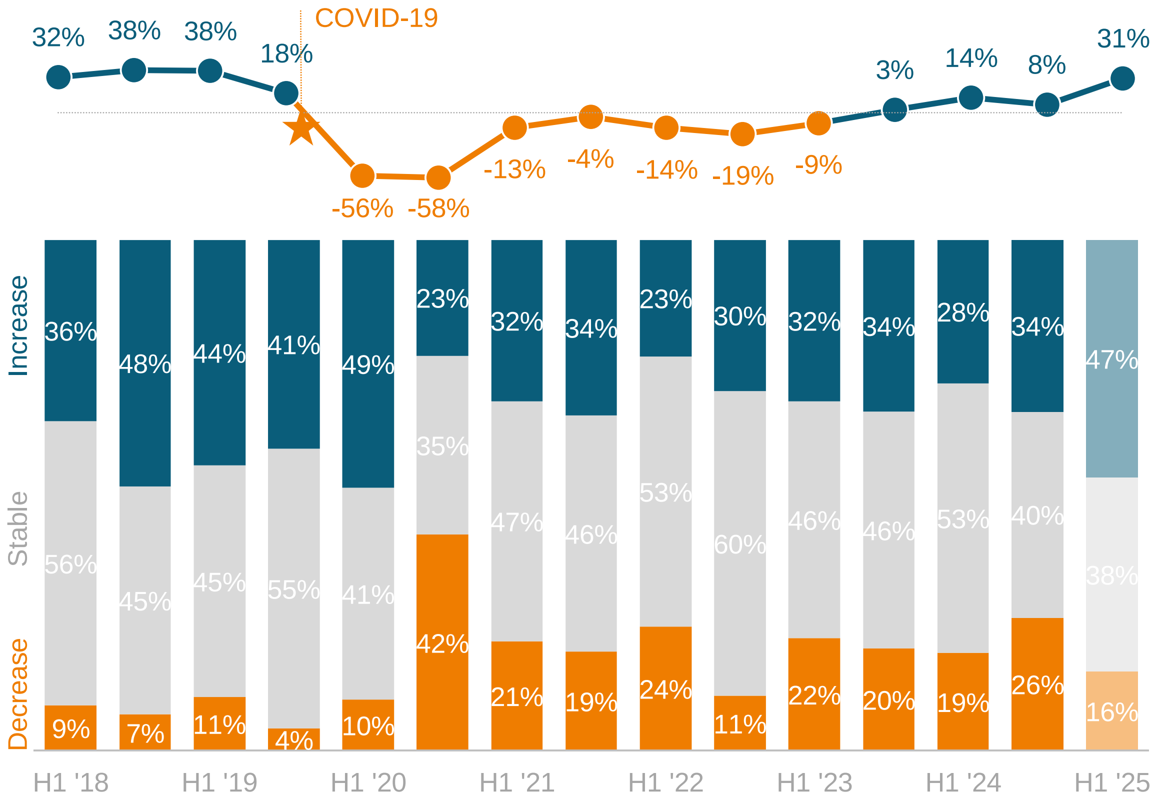


*Results are weighted: Actual total N = 125; 5 – 15 FTE N=68; 16+ FTE N=57.

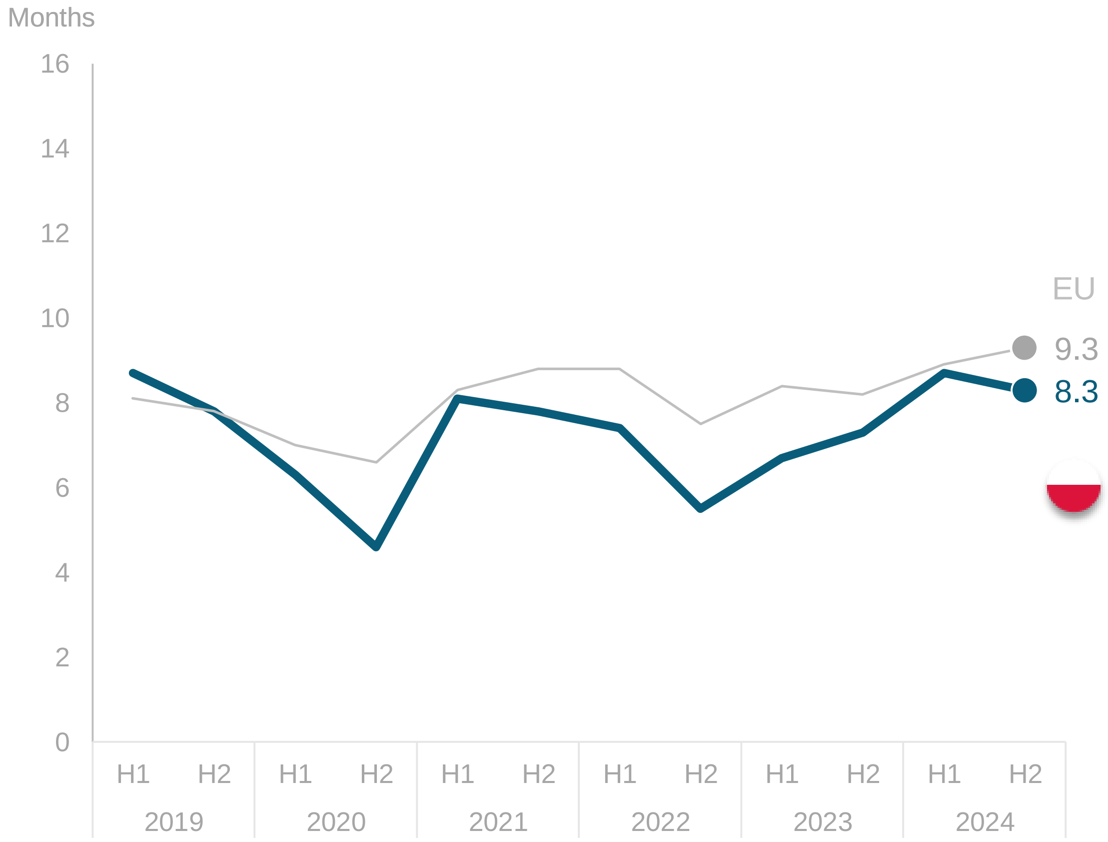
The upward trend that started approximately 2,0 years ago, will continue in H1

Net share of contractors' experience regarding turnover
If you compare your turnover of H2-24 to H2-23, how did your turnover develop?
What are your expectations for the development in H1-25 compared to H1-24?

Balance: Share of contractors reporting INCREASE minus the share of contractors reporting DECREASE



Order book in months
For how many months will you be able to keep your current staff working?



*Results are weighted: Actual total N = 125; 5 – 15 FTE N=68; 16+ FTE N=57.

Index

Preface

Management summary

Profiling the building contractor

Theme part: Digitalisation and BIM

European overview*

Appendix

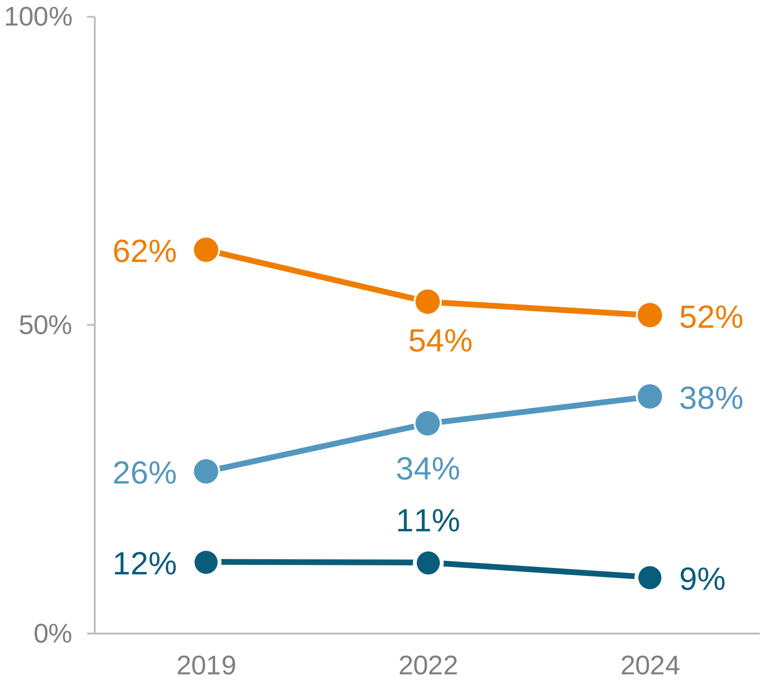
** The usage and awareness will be shown on a total European level, as well as per country. Other results regarding BIM will be shown on a total level since the usage in most countries is too low to show that on an individual country level. Some results are, however, shown per country in the appendix.*

The awareness of BIM is slightly increasing. However, the share of contractors using it remains more or less the same

The share of BIM within the total portfolio of those contractors that use BIM is also increasing. The share of the turnover these BIM projects represent are slightly decreasing, meaning smaller projects are done in BIM. It could also reflect the economic situation of the construction sector in some countries: in difficult times contractors are more reluctant to implement big changes. Same pattern we saw regarding prefab.

Familiarity with BIM

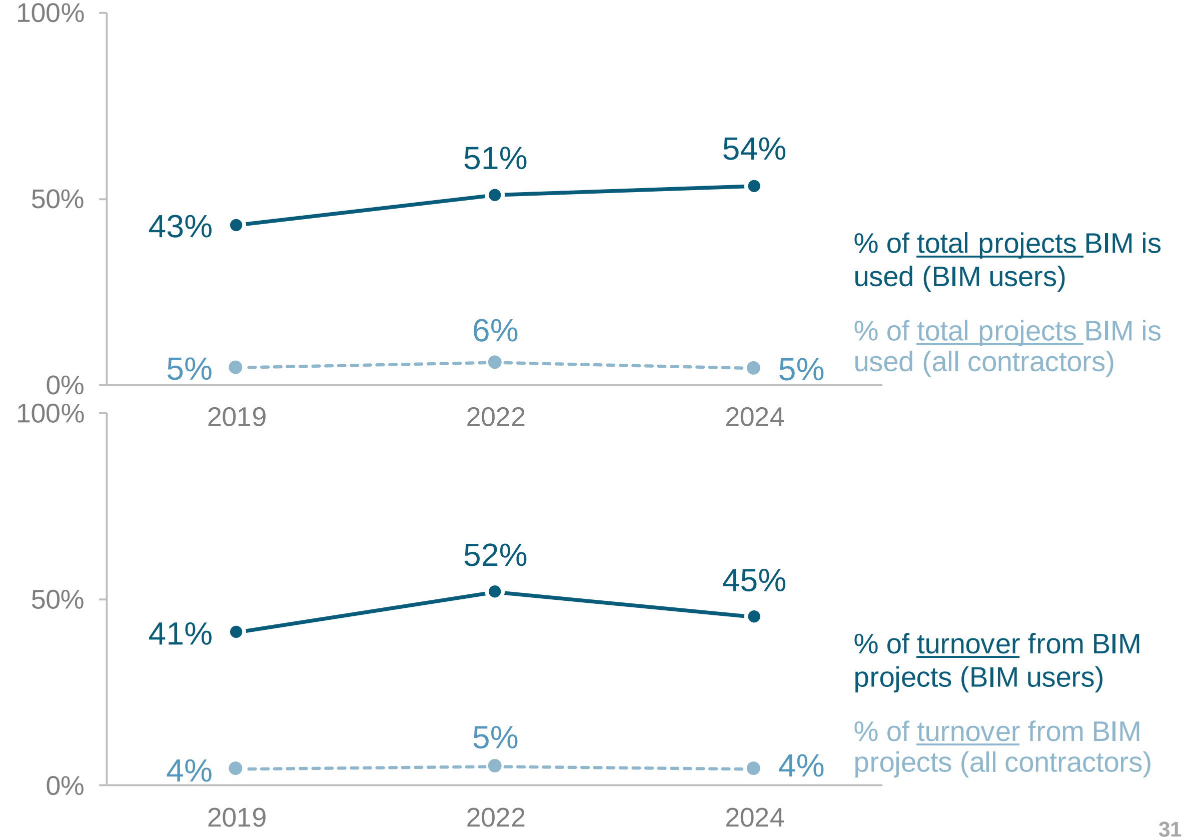
Are you **familiar with the term BIM**, Building Information Modeling? And do you **use it**?



	2024 by fte category	
	5-15 FTE	16+ FTE
Don't know BIM	58%	45%
Know BIM, don't use BIM	38%	39%
Use BIM	4%	16%

Usage of BIM

What is the **share of projects** in which BIM is used?
What **percentage of the turnover** comes from BIM projects?



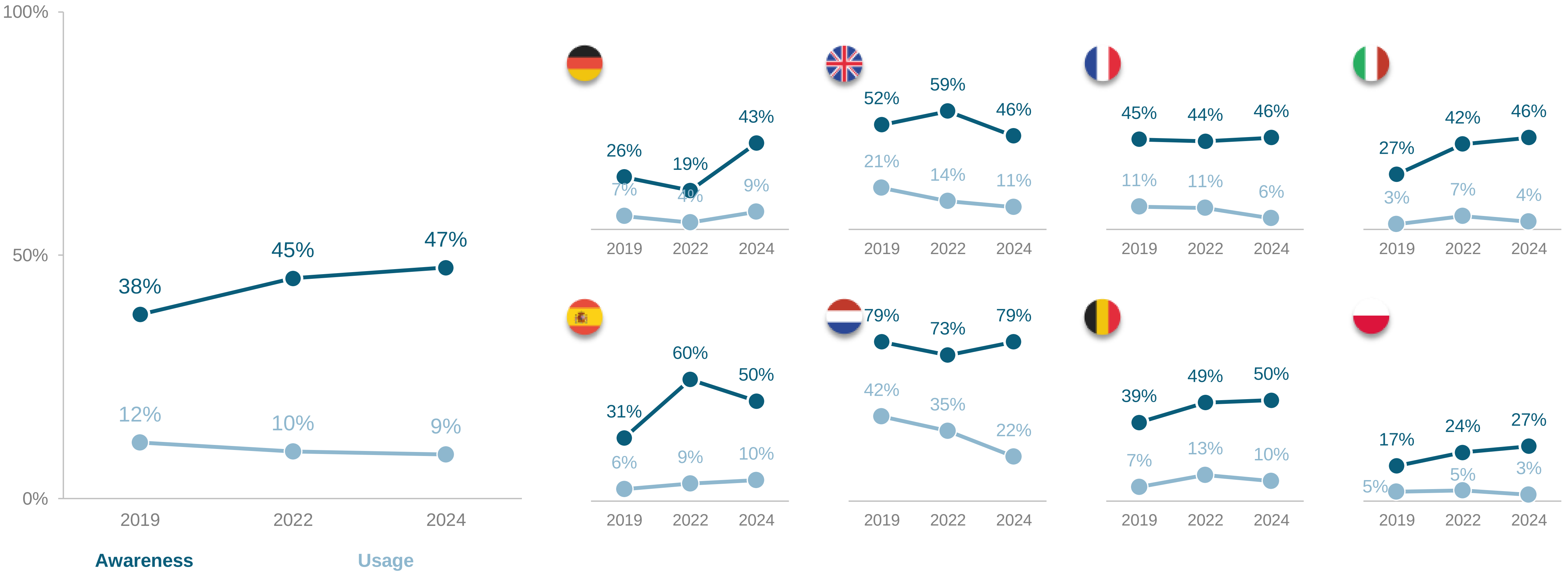
2024 N=951; 2022 N=950; 2018 N=1100.

Looking at country level we see an increase in Germany and a drop in the Netherlands

The increase in awareness and usage in Germany can be explained by the fact that since the end of 2022, BIM has been mandatory for public building projects. Although awareness remains high in the Netherlands (the highest of all countries), we see a drop in the number of contractors using it. This can be explained by the fact that new build production has dropped slightly, and part of the production is done by industrial prefab producers.

Trend in awareness and usage

Are you **familiar with the term BIM**, Building Information Modeling? And do you **use it**?

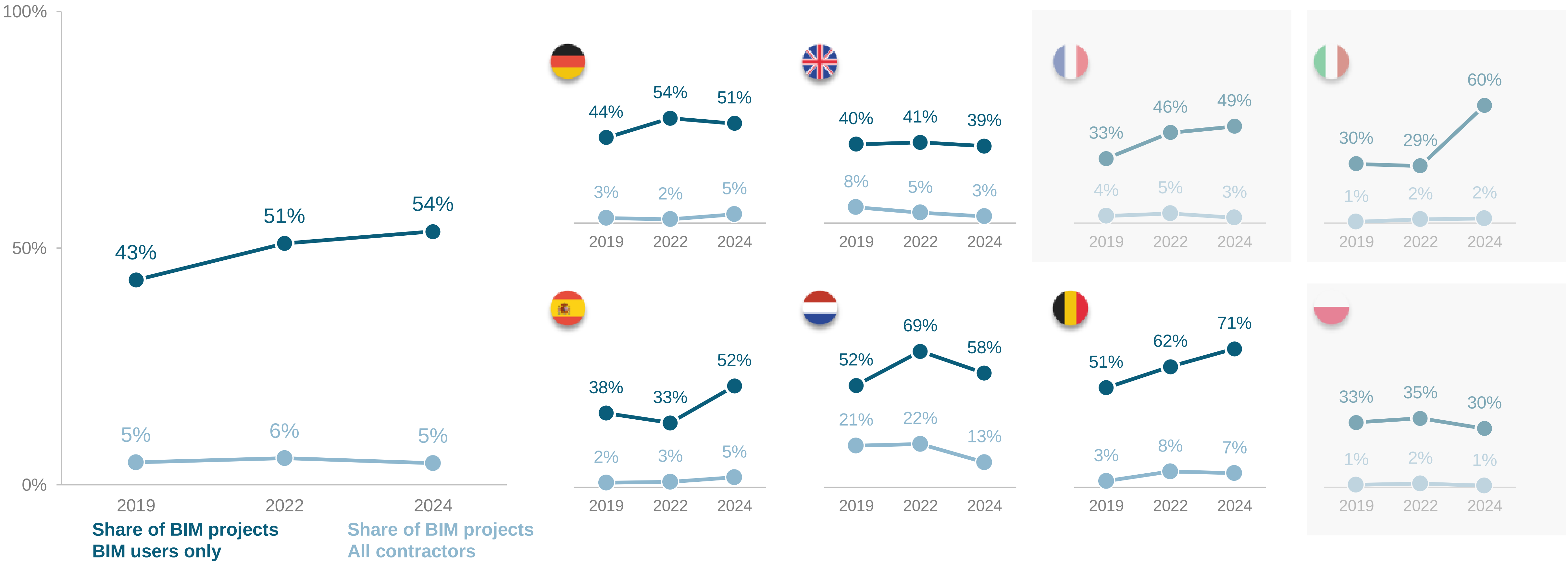


The share of BIM is slightly increasing for those contractors that use BIM

The total share of BIM within all projects, remains rather limited. This has multiple reasons, which will be explained in detail later. Two main reasons are the economic situation of the construction sector (amongst users) and the size of the company or projects (amongst non-users).

Trend in BIM Shares

What is the **share of projects** in which BIM is used?



Total N=81: Belgium N=10; France N=7; Germany N=11; Italy N=5; Netherlands N=22; Poland N=3; Spain N=12; United Kingdom N=11.

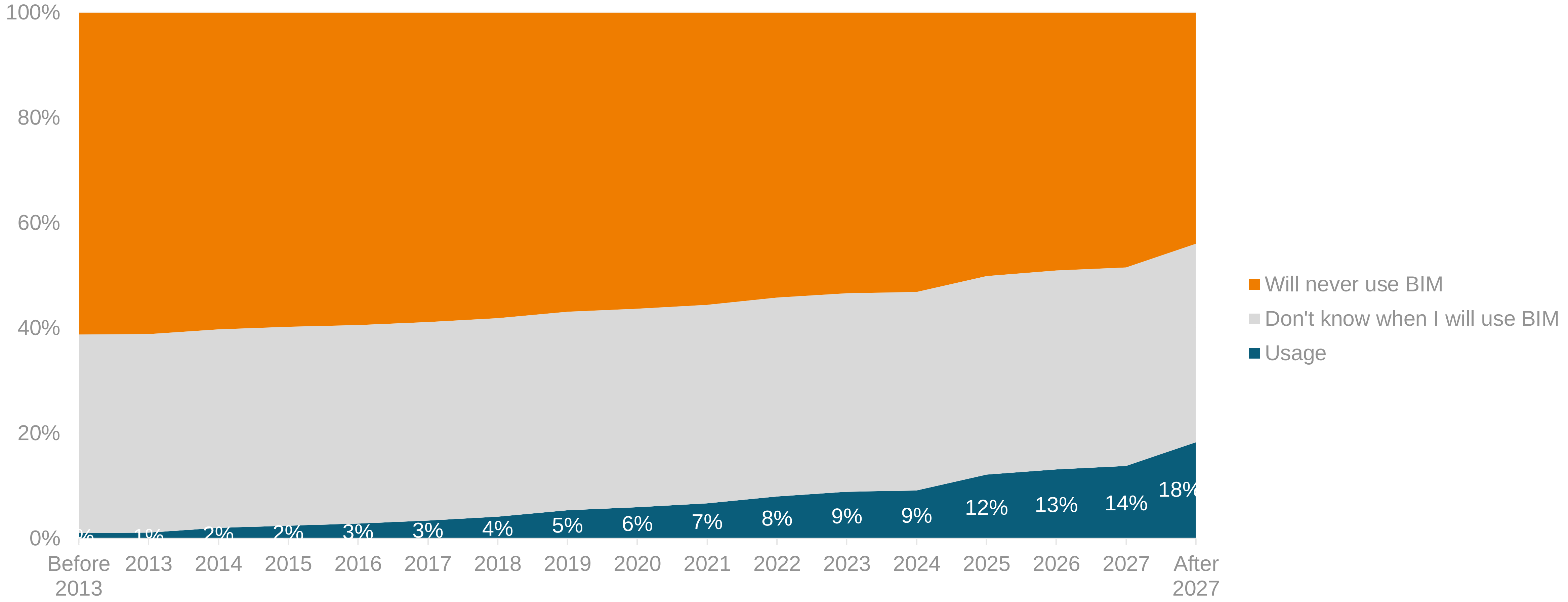
Total N=951: Belgium N=100; France N=125; Germany N=126; Italy N=125; Netherlands N=100; Poland N=125; Spain N=125; United Kingdom N=125.

The amount of BIM users will be at least doubled in the future

There is also a large group of contractors who still don’t know whether or when they will use BIM (38%) and almost half of the contractors state they will never use BIM (44%), not even after 2027.

Year of BIM start in the company / Future BIM start

When did your company started to work with BIM? / When will your company start using BIM?



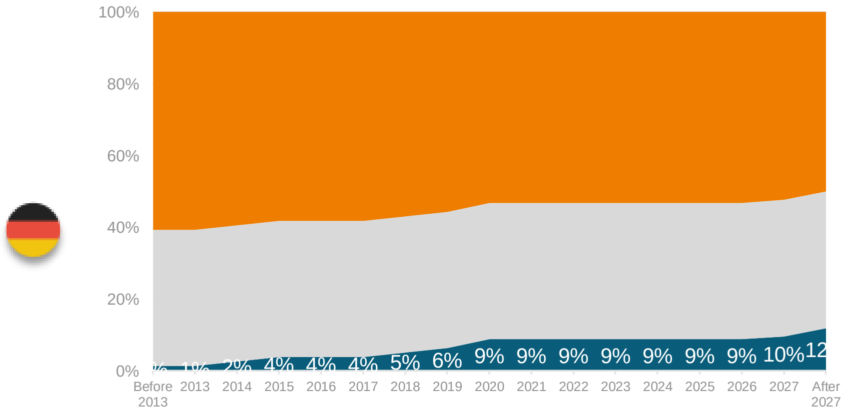
2024 N=951

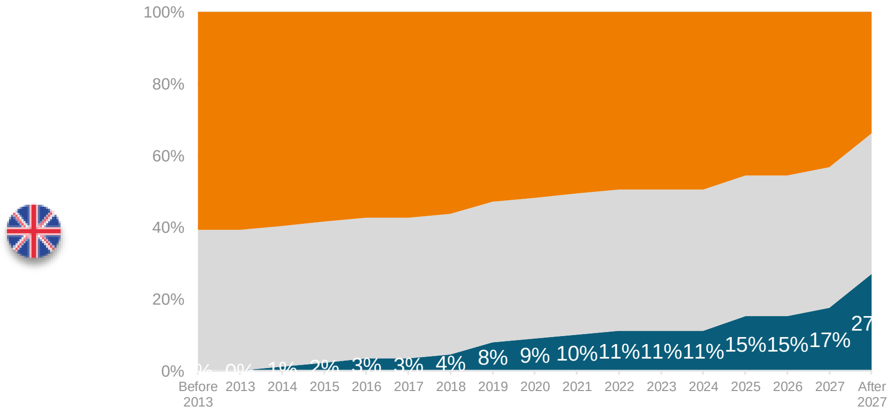
The Netherlands, United Kingdom and Spain are the countries were BIM will be used the most in the future

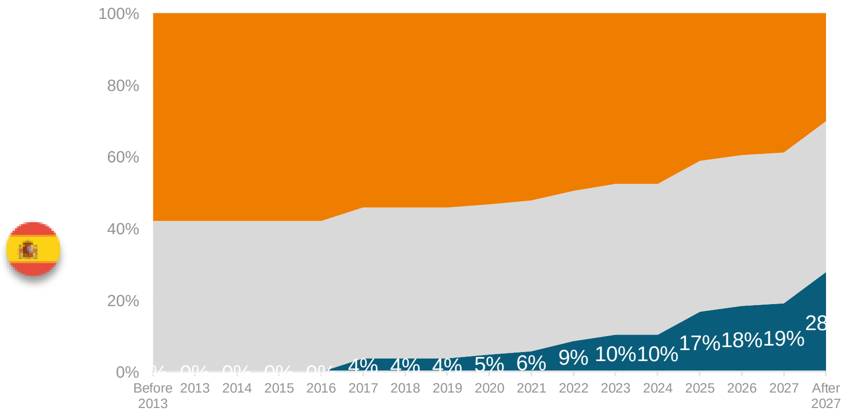
Year of BIM start in the company / Future BIM start

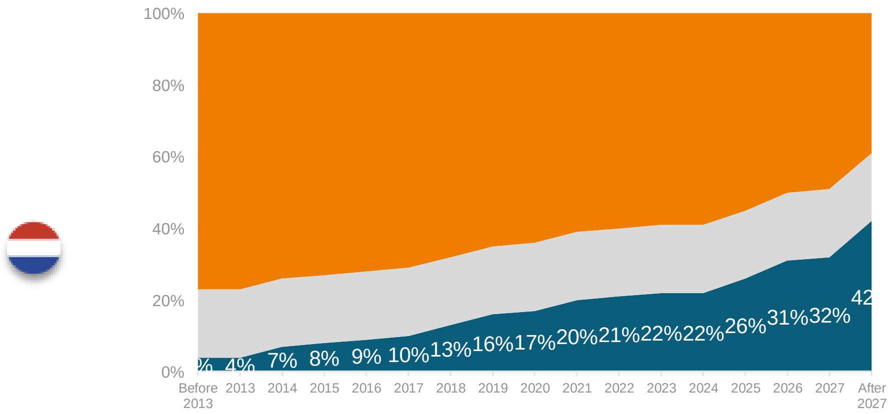
When did your company started to work with BIM? / When will your company start using BIM?

Usage **Don't know when I will use BIM** **Will never use BIM**









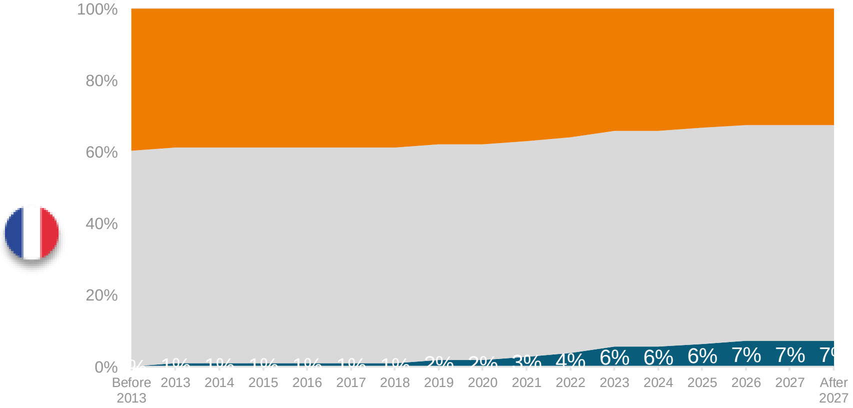
2024 N=951

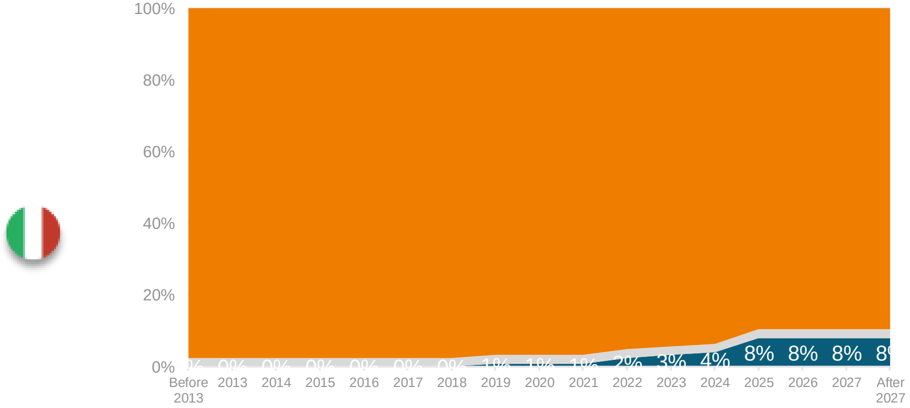
In Italy, most contractors state they will never use BIM, and in other countries, a large portion of the contractors does not know yet whether or when they will use it

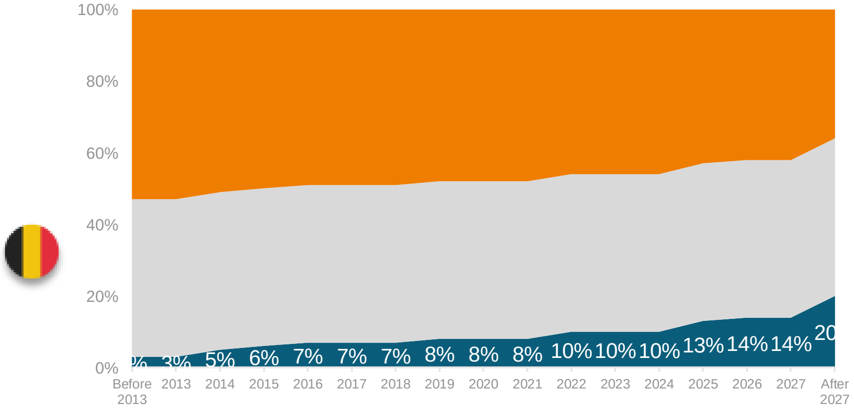
Year of BIM start in the company / Future BIM start

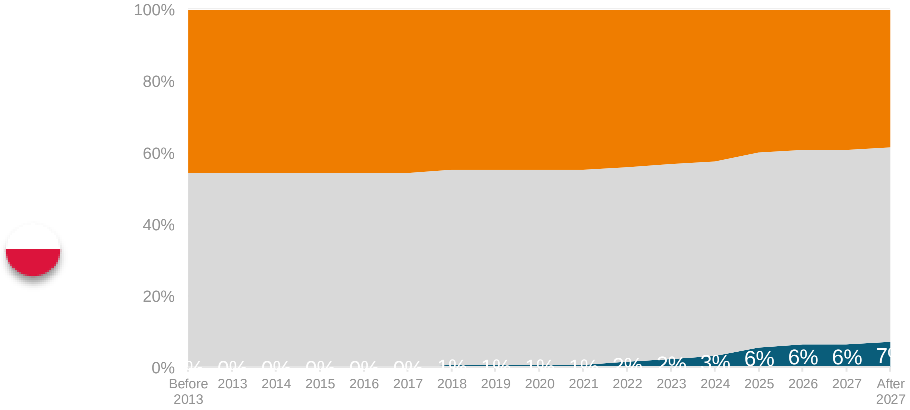
When did your company started to work with BIM? / When will your company start using BIM?

Usage **Don't know when I will use BIM** **Will never use BIM**









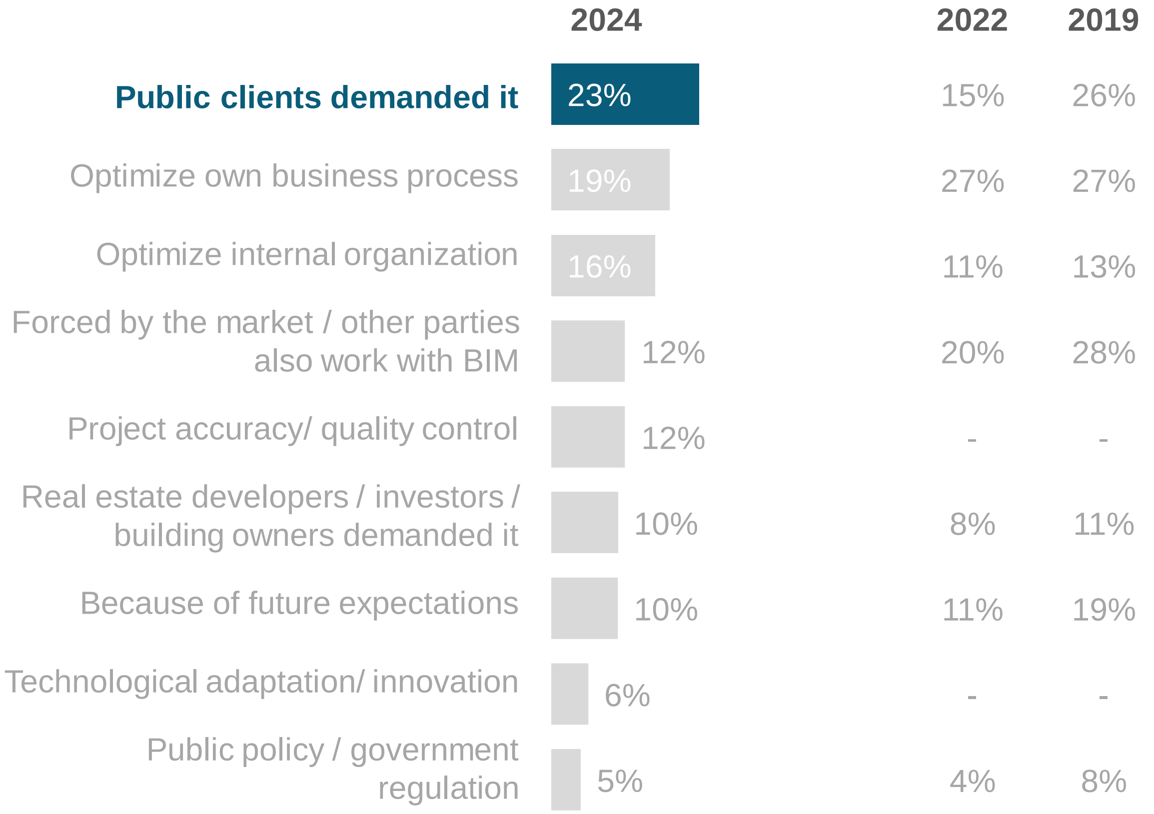
2024 N=951

Main driver for using BIM is public clients demanding it, especially in Germany and the United Kingdom; other market parties are less of a driver

The main reason for not using BIM is size: the size of projects and/or the size of the company.

Reasons for using BIM

Why did your organization start using BIM?

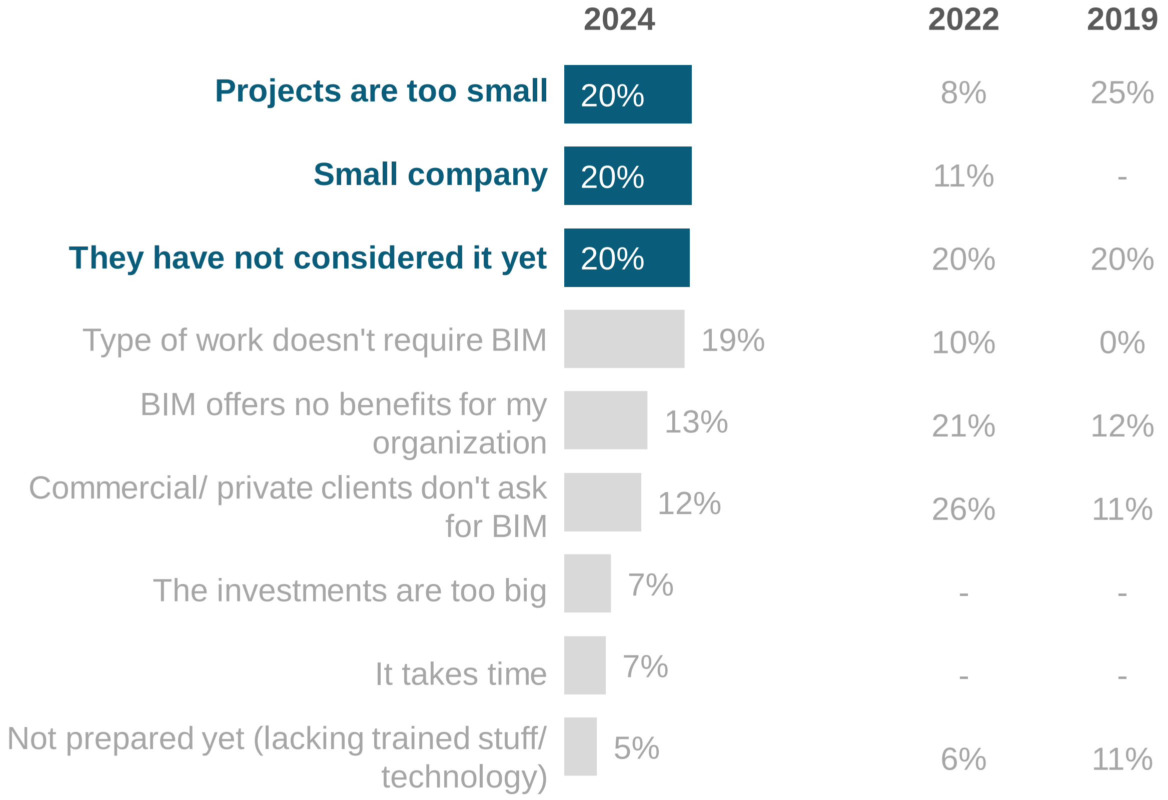


	2024	2022	2019
Public clients demanded it	23%	15%	26%
Optimize own business process	19%	27%	27%
Optimize internal organization	16%	11%	13%
Forced by the market / other parties also work with BIM	12%	20%	28%
Project accuracy/ quality control	12%	-	-
Real estate developers / investors / building owners demanded it	10%	8%	11%
Because of future expectations	10%	11%	19%
Technological adaptation/ innovation	6%	-	-
Public policy / government regulation	5%	4%	8%

N=86.

Reasons for not using BIM

Why is your organization not (yet) started with using BIM?



	2024	2022	2019
Projects are too small	20%	8%	25%
Small company	20%	11%	-
They have not considered it yet	20%	20%	20%
Type of work doesn't require BIM	19%	10%	0%
BIM offers no benefits for my organization	13%	21%	12%
Commercial/ private clients don't ask for BIM	12%	26%	11%
The investments are too big	7%	-	-
It takes time	7%	-	-
Not prepared yet (lacking trained stuff/ technology)	5%	6%	11%

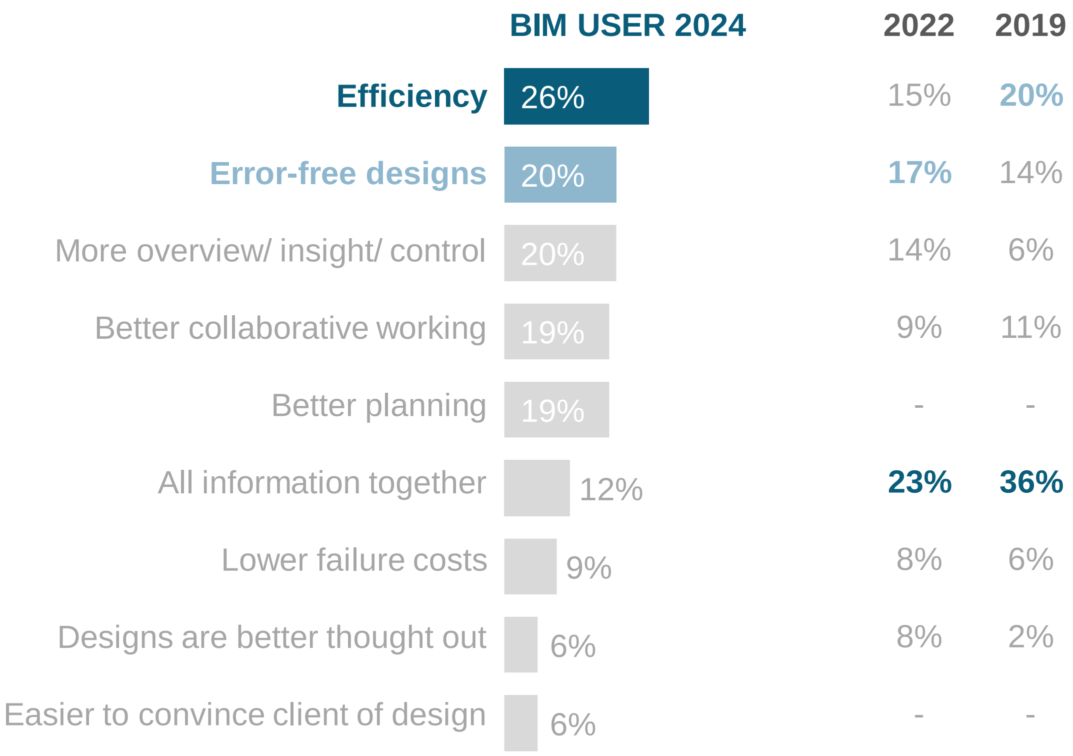
N=365.

The advantages of BIM have become more precise than five years ago when they just said ‘all information together’: it is about efficiency and error-free designs

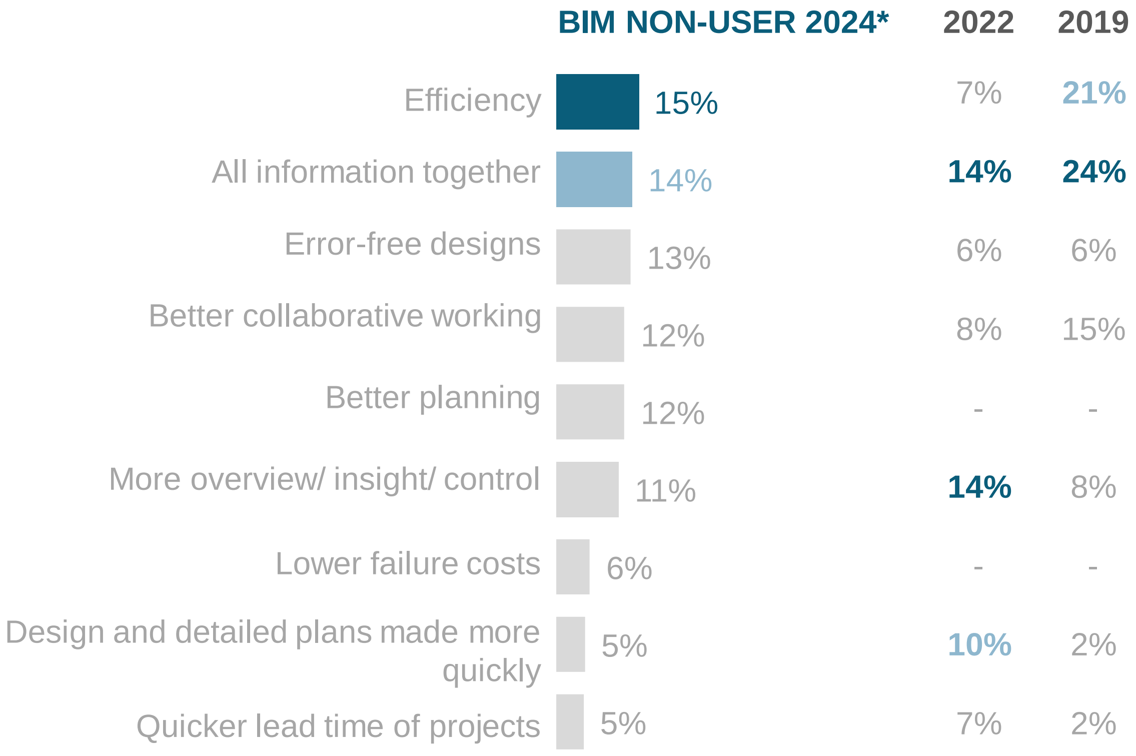
Amongst the non-users we still see the answer ‘all-information together’ in second place as (perceived) advantage, but even amongst these contractors we see an increase of more precise answers when it comes to the advantages of BIM.

Main advantages of BIM

What do you consider the greatest advantages of BIM?



2024 N=86; 2022 N=92; 2019 N=64.

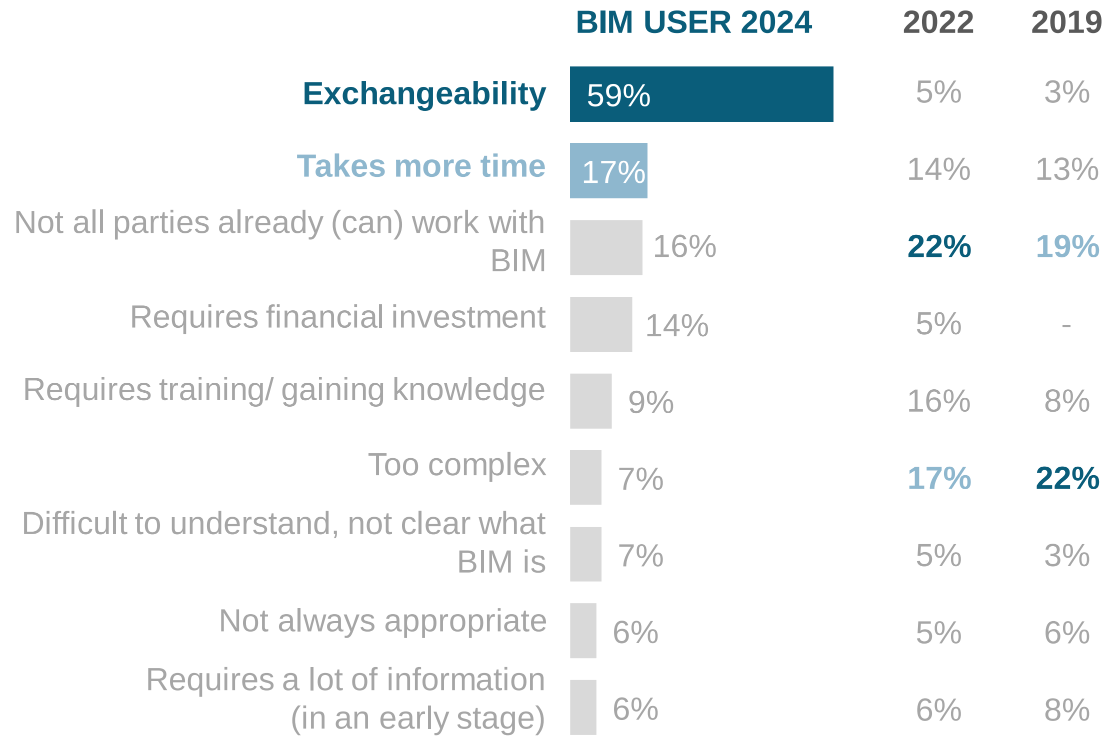


2024 N=451; 2022 N=338; 2019 N=125 (*only non-users aware of BIM).

Both users and non-users see exchangeability as the most significant limitation of BIM, meaning it is difficult to share with other stakeholders in a project

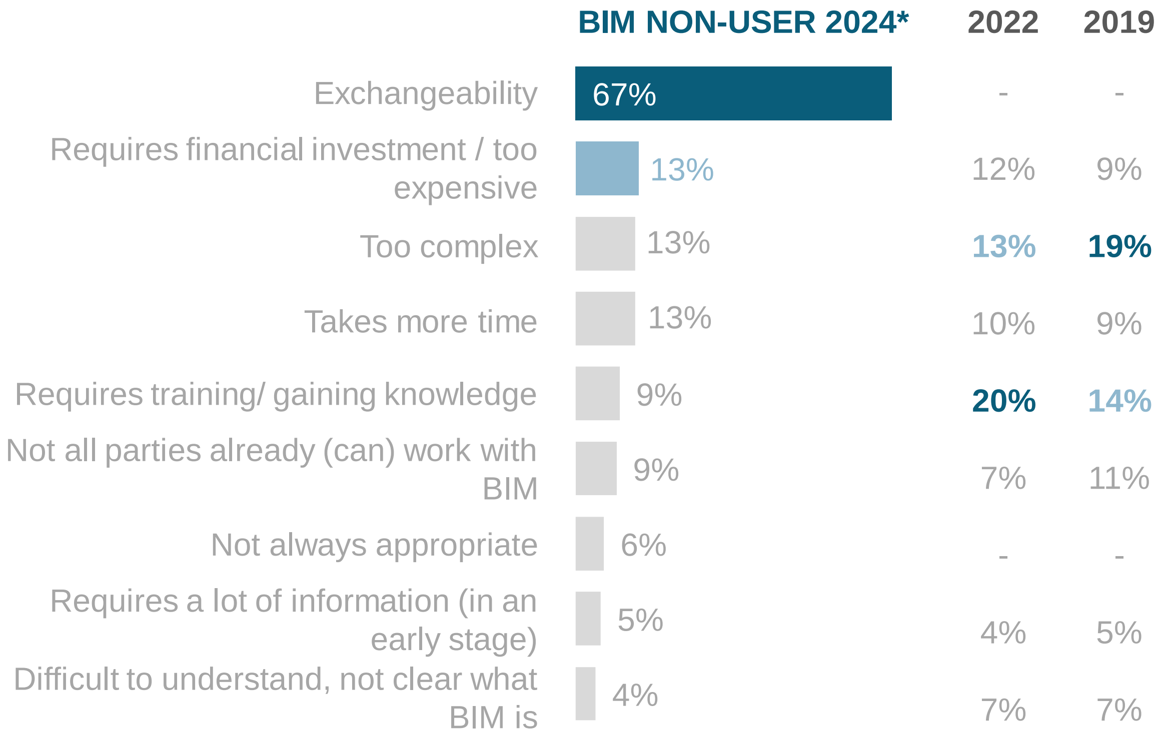
Main limitations of BIM

What do you consider to be the greatest limitations or pain points for BIM?



	BIM USER 2024	2022	2019
Exchangeability	59%	5%	3%
Takes more time	17%	14%	13%
Not all parties already (can) work with BIM	16%	**22%**	**19%**
Requires financial investment	14%	5%	-
Requires training/ gaining knowledge	9%	16%	8%
Too complex	7%	**17%**	**22%**
Difficult to understand, not clear what BIM is	7%	5%	3%
Not always appropriate	6%	5%	6%
Requires a lot of information (in an early stage)	6%	6%	8%

2024 N=86; 2022 N= 92; 2019 N=63.



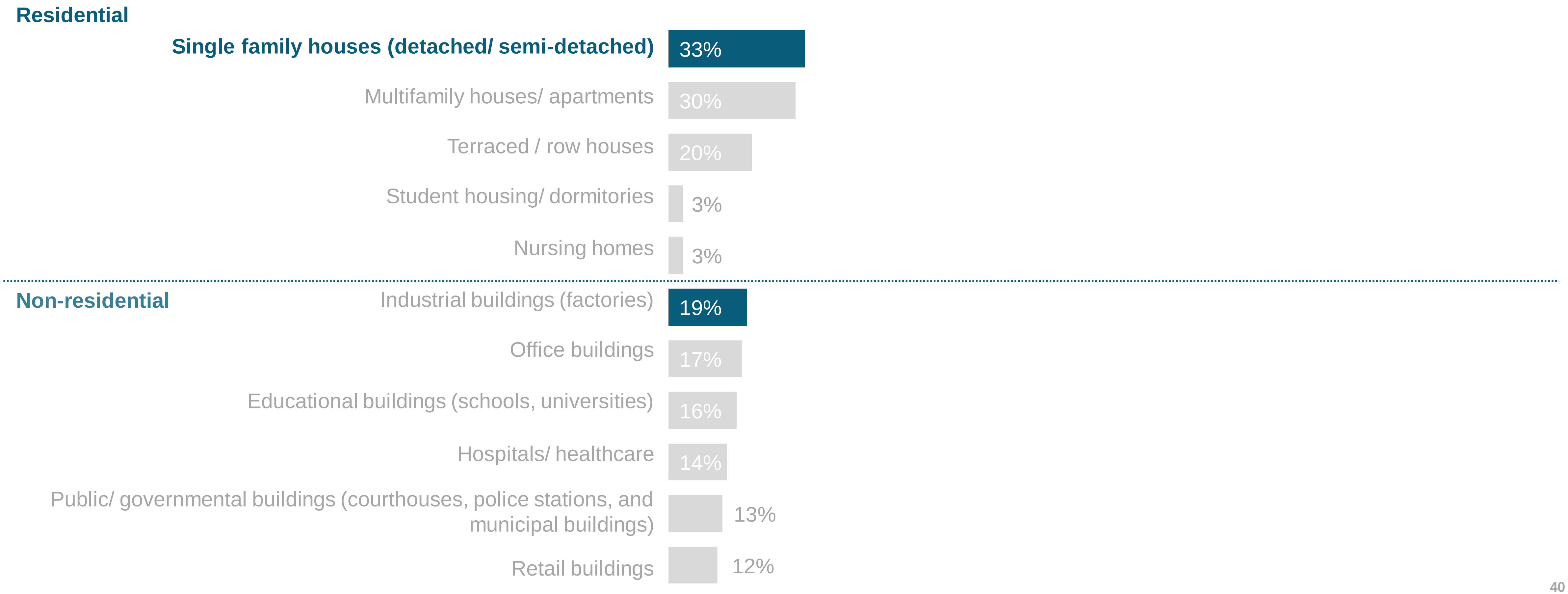
	BIM NON-USER 2024*	2022	2019
Exchangeability	67%	-	-
Requires financial investment / too expensive	13%	12%	9%
Too complex	13%	**13%**	**19%**
Takes more time	13%	10%	9%
Requires training/ gaining knowledge	9%	**20%**	**14%**
Not all parties already (can) work with BIM	9%	7%	11%
Not always appropriate	6%	-	-
Requires a lot of information (in an early stage)	5%	4%	5%
Difficult to understand, not clear what BIM is	4%	7%	7%

2024 N=451; 2022 N=338; 2019 N=174 (*only non-users aware of BIM).

BIM is used more in residential projects than in non-residential projects

This does not mean it is more applicable to residential projects. It also has to do with 1) whether contractors are building specific projects, 2) the size of a project, and 3) the frequency and repetition of a type of project

Types of projects for BIM
In what type of projects (building types) is BIM used the most?



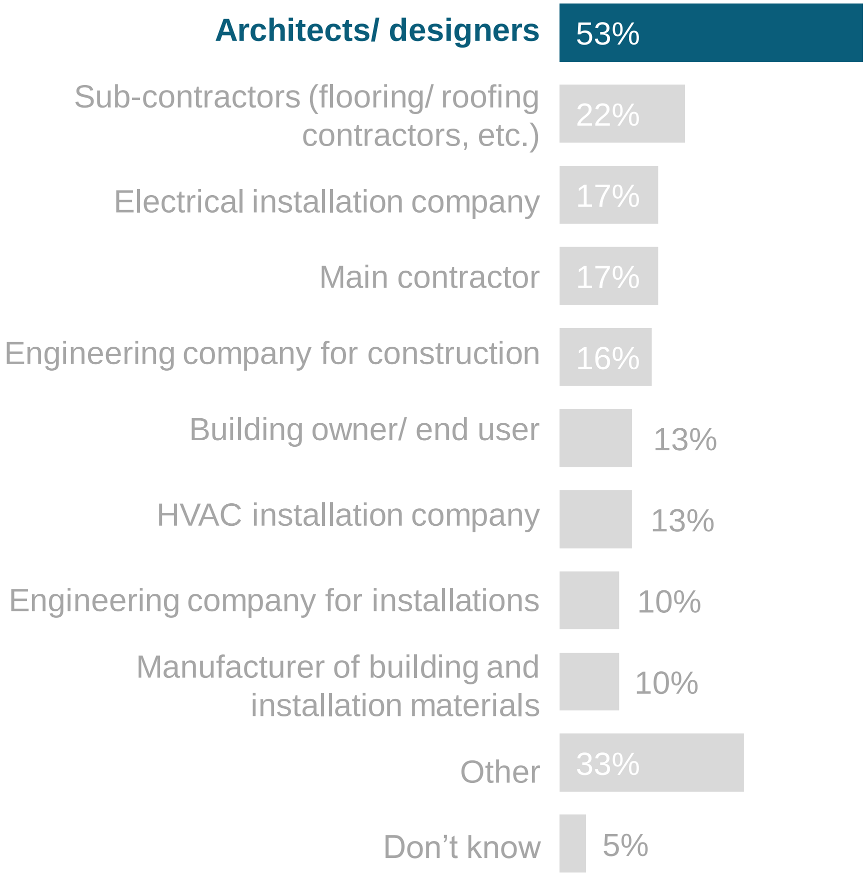
N=86.

Most contractors already cooperate in BIM with architects

The architect is, however, not more responsible than the main contractor when it comes to the responsibility of the data in the model

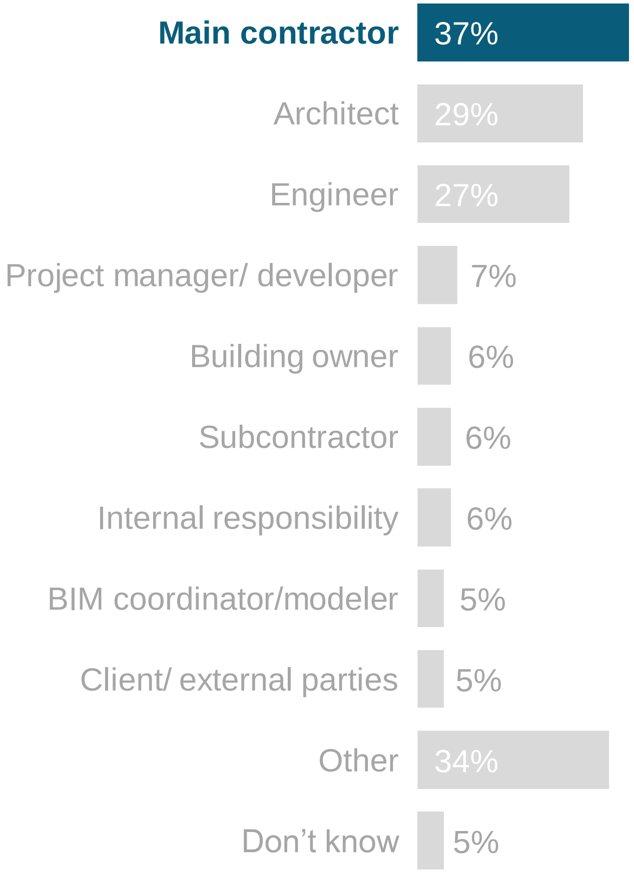
Cooperation with other parties

Which other parties do you already cooperate with using BIM processes in your projects?



Data responsibility in BIM

Who is responsible for the data within the model?

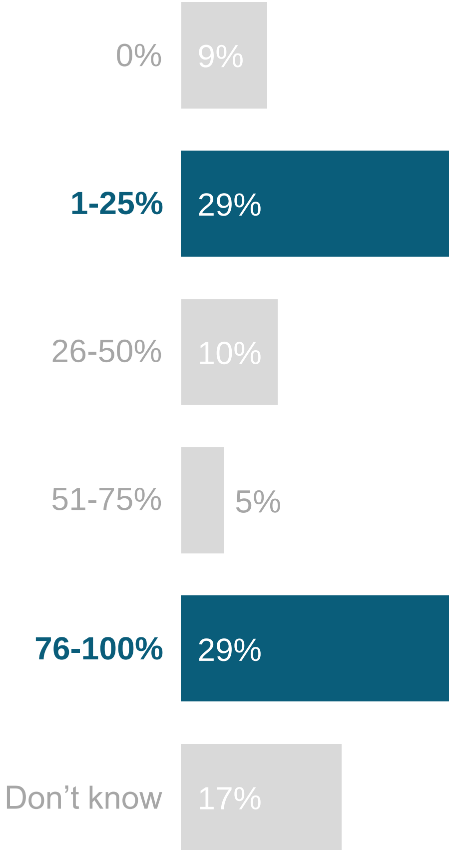


2024 N=86.

Although the building owner is often not included during the project, the contractors hand over a BIM model to them in half of the projects (47%).

Share of projects with BIM model handover

What is the share of projects in which you handover a BIM model to the client/ building owner?



47%

Average share of projects where a BIM model is handed over

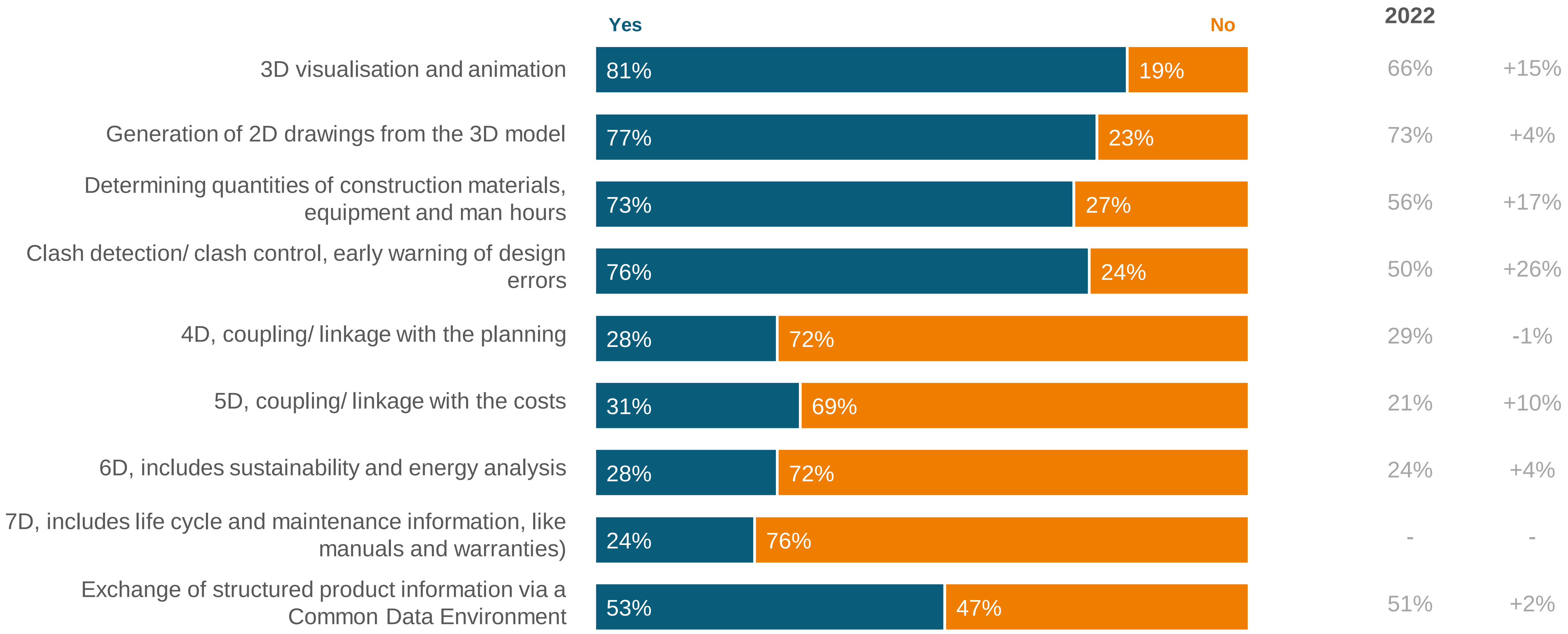
2024 N=86.

Although not all features of BIM are used by the users, we do see an increase in all individual features, indicating contractors are using more of the potential BIM offers

The increase is mainly within the more basic features and not yet within the features that allow links to planning, costs and LCA.

BIM features

Which of the following features of BIM do you use?



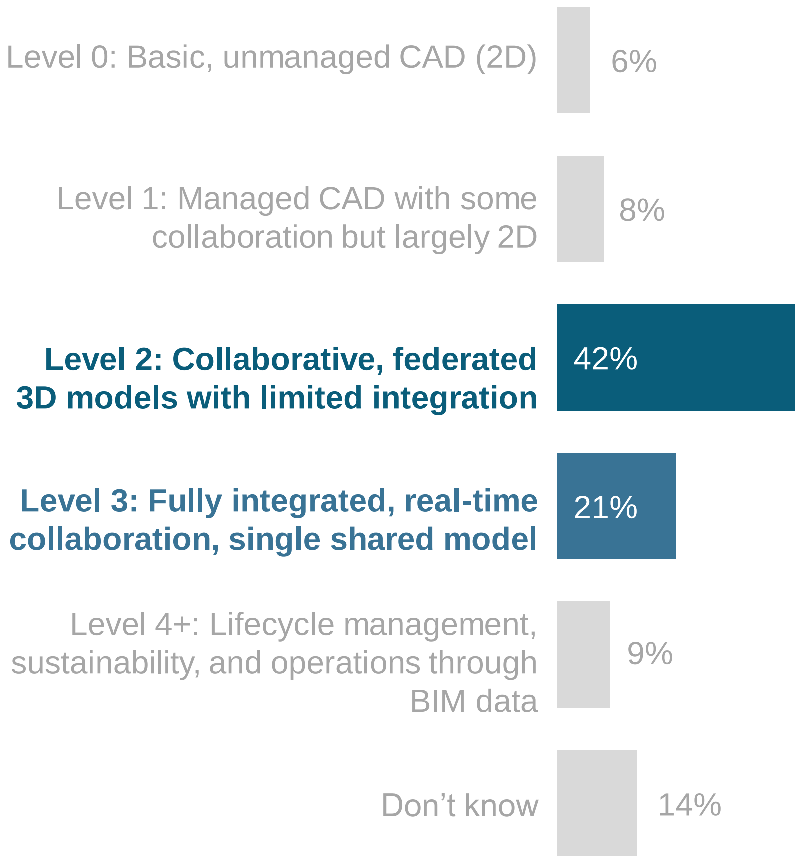
3D visualisation and animation	81%	19%	66%	+15%
Generation of 2D drawings from the 3D model	77%	23%	73%	+4%
Determining quantities of construction materials, equipment and man hours	73%	27%	56%	+17%
Clash detection/ clash control, early warning of design errors	76%	24%	50%	+26%
4D, coupling/ linkage with the planning	28%	72%	29%	-1%
5D, coupling/ linkage with the costs	31%	69%	21%	+10%
6D, includes sustainability and energy analysis	28%	72%	24%	+4%
7D, includes life cycle and maintenance information, like manuals and warranties)	24%	76%	-	-
Exchange of structured product information via a Common Data Environment	53%	47%	51%	+2%

2024 N=86; 2022 N=92.

Most contractors who use BIM mainly operate on level 2: collaboration with limited integration, only a limited amount operate on level 4+ (11%)

BIM level

On what BIM level do you mainly operate within projects?



2024 N=86.

Although theoretically, there are some differences between level 2 and level 3, the contractors don’t differ that much; the real potential of BIM is used at level 4+

BIM features by level of implementation
Which of the following features of BIM do you use?
On what BIM level do you mainly operate within projects?

	Level 0: Basic, unmanaged CAD (2D)	**Level 1: Managed CAD with some collaboration but largely 2D**	**Level 2: Collaborative, federated 3D models with limited integration**	**Level 3: Fully integrated, real-time collaboration, single shared model**	**Level 4+: Lifecycle management, sustainability, and operations through BIM data**	**Don’t know**
	6%	**8%**	**42%**	**21%**	**9%**	**14%**
3D visualisation and animation	100%	**86%**	89%	83%	88%	42%
Generation of 2D drawings from the 3D model	60%	**86%**	78%	89%	88%	50%
Determining quantities of construction materials, equipment and man hours	60%	43%	81%	78%	100%	50%
Clash detection/ clash control, early errors warning	80%	57%	**83%**	89%	88%	33%
4D, coupling/ linkage with the planning	20%	14%	25%	**44%**	50%	8%
5D, coupling/ linkage with the costs	20%	29%	36%	**17%**	88%	8%
6D, includes sustainability and energy analysis	40%	29%	22%	28%	**75%**	8%
7D, includes life cycle and maintenance information, like manuals and warranties)	20%	29%	17%	33%	**63%**	8%
Exchange of structured product information via a Common Data Environment	40%	43%	50%	83%	88%	8%
Average number of features used (max. 9)	***4,9***	***4,6***	***5,3***	***6,0***	***8,1***	***2,4***

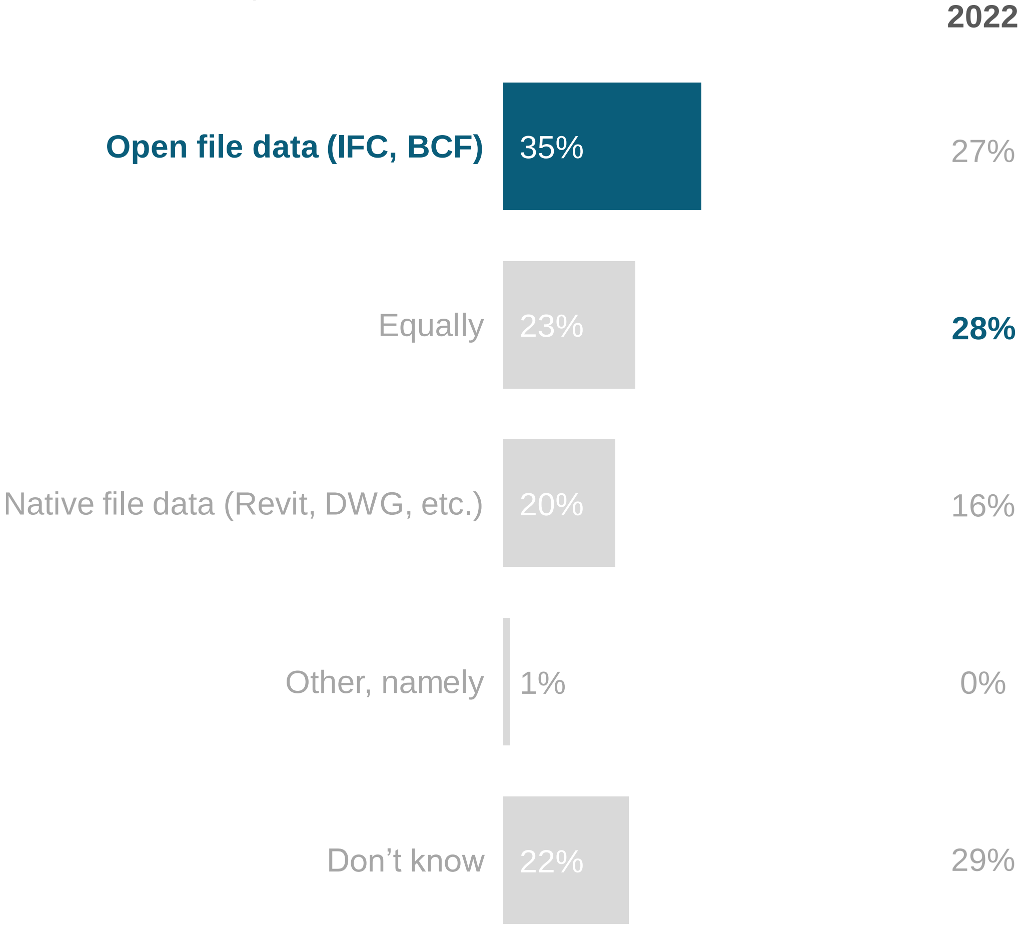
Total N=86; Level 0 N=5; Level 1 N=7; Level 2 N=36; Level 3 N=18; Level 4+ N

Most BIM using contractors use open file data (35%), although there are also contractors who work more with native file data (20%)

Compared to two years ago, contractors are more focused on either open file or native file data

Type of file data

Do you work more with open file data or with native file data?

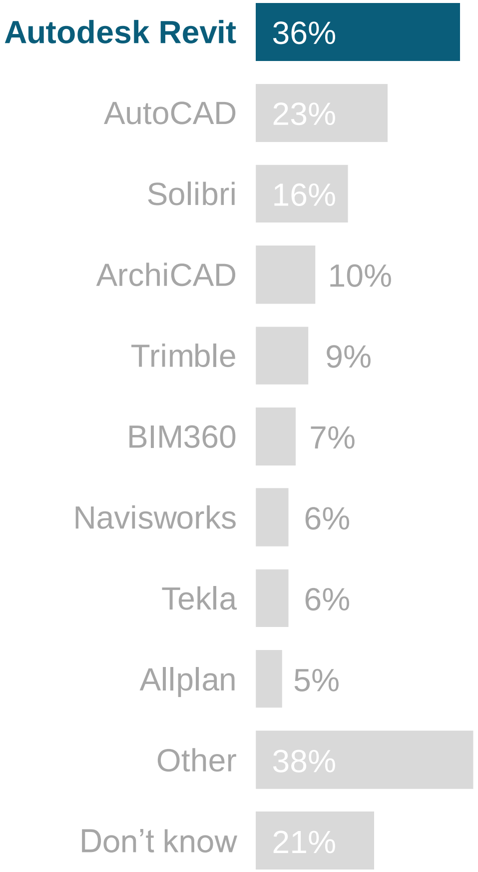


2024 N=86; 2022 N=109.

Autodesk Revit is the most used BIM-related software

Autodesk Revit is therefore the most used software amongst contractors and architects

BIM software (contractors)
Which BIM-related software do you use?



BIM software (architects)
Which software is used to deliver your BIM projects?

1. Autodesk Revit
2. Graphisoft Archicad
3. Vectorworks

2024 N=86.

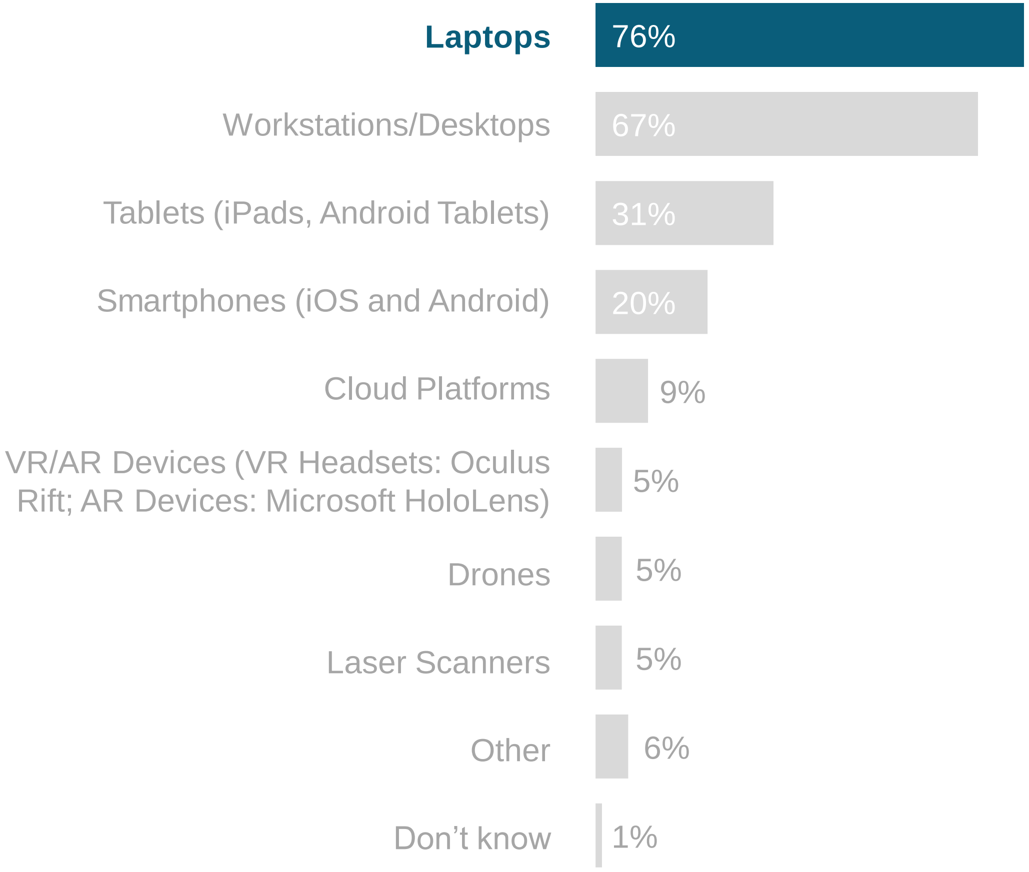
Source: USP European Architectural Barometer Q4-2023

Laptops and desktops are the most used devices when using BIM

Every third BIM-using contractor is also using tablets, and every fifth BIM-using contractor uses smartphones when working in a BIM model or tool

Devices for BIM usage

On what devices does your company make use of BIM and/or BIM tools?

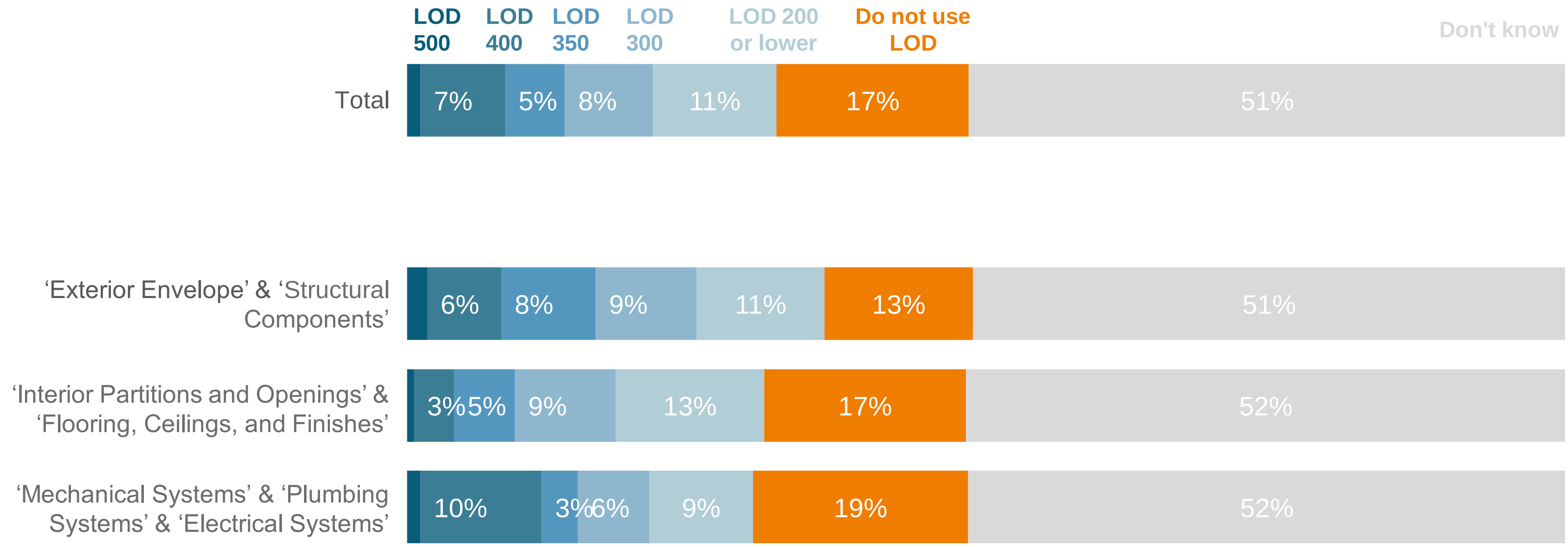


2024 N=86.

LOD levels are not daily practice since half of the BIM users don’t know to what level of detail they include information in their BIM models

LOD used for information in BIM

To what level of detail (LOD) do you include information in your BIM model regarding the following product groups?

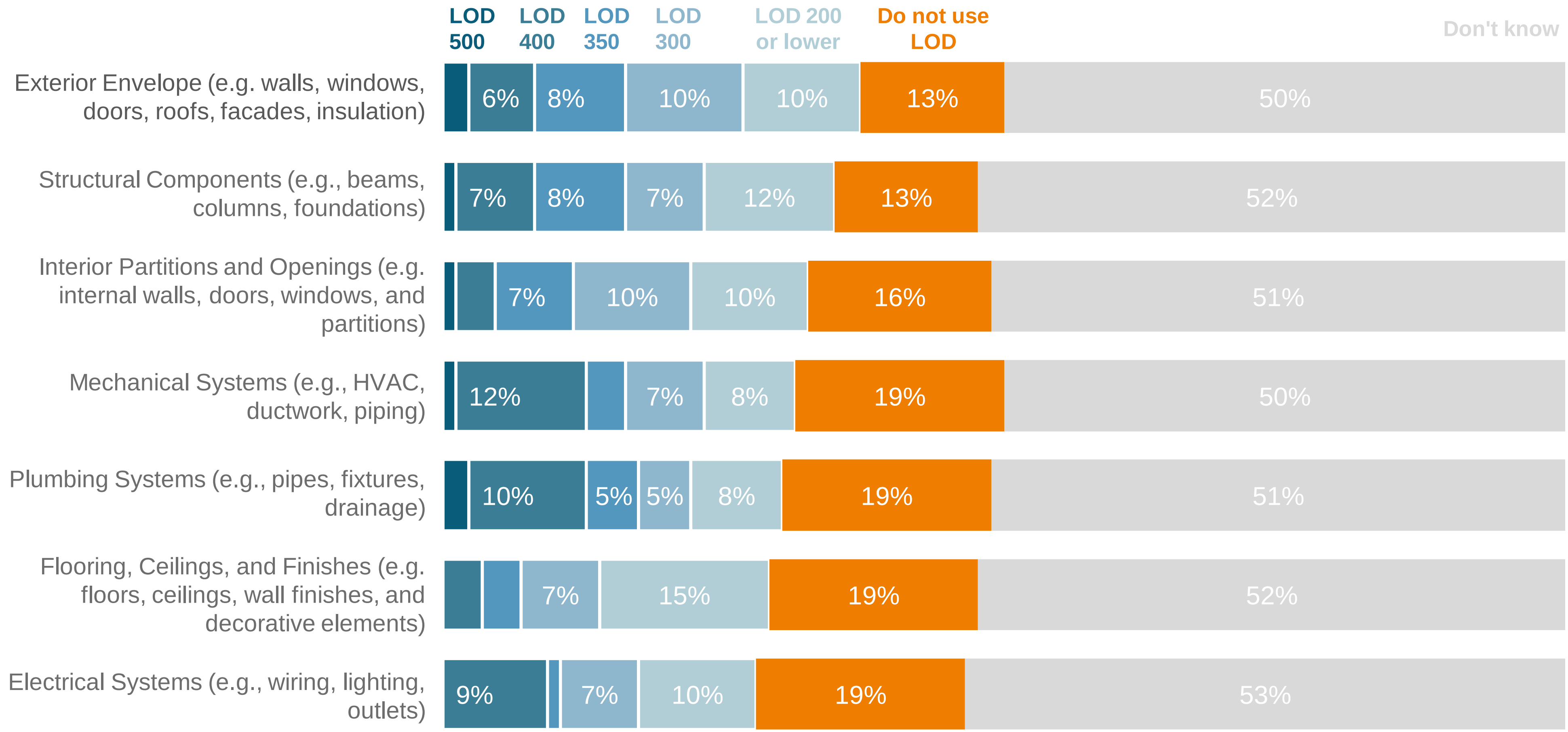


2024 N=86.

If LODs are used, we see that the installation parts (mechanical, plumbing, and electrical) are more detailed – meaning LOD 400 or 500 – than other building parts

LOD used for information in BIM

To what level of detail (LOD) do you include information in your BIM model regarding the following product groups?

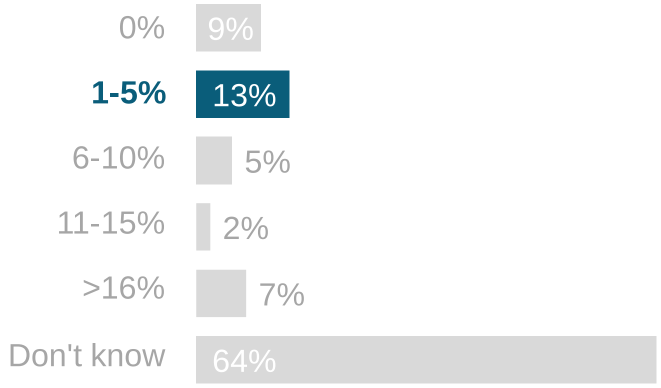


2024 N=86.

Failure costs are lower in projects where BIM is used: 7% versus 11%

Failure costs in BIM and non-BIM projects
Can you give a rough estimation of the failure costs in projects where …?

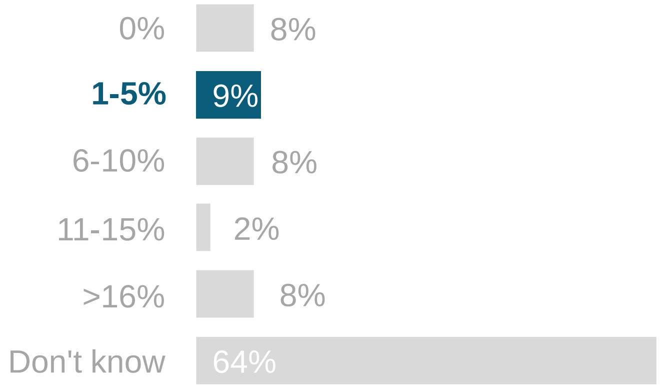
Failure costs in projects where BIM is used



7,0%

Average failure costs **with using BIM**

Failure costs in projects where BIM is not used



11,3%

Average failure costs **without using BIM**

N=86.

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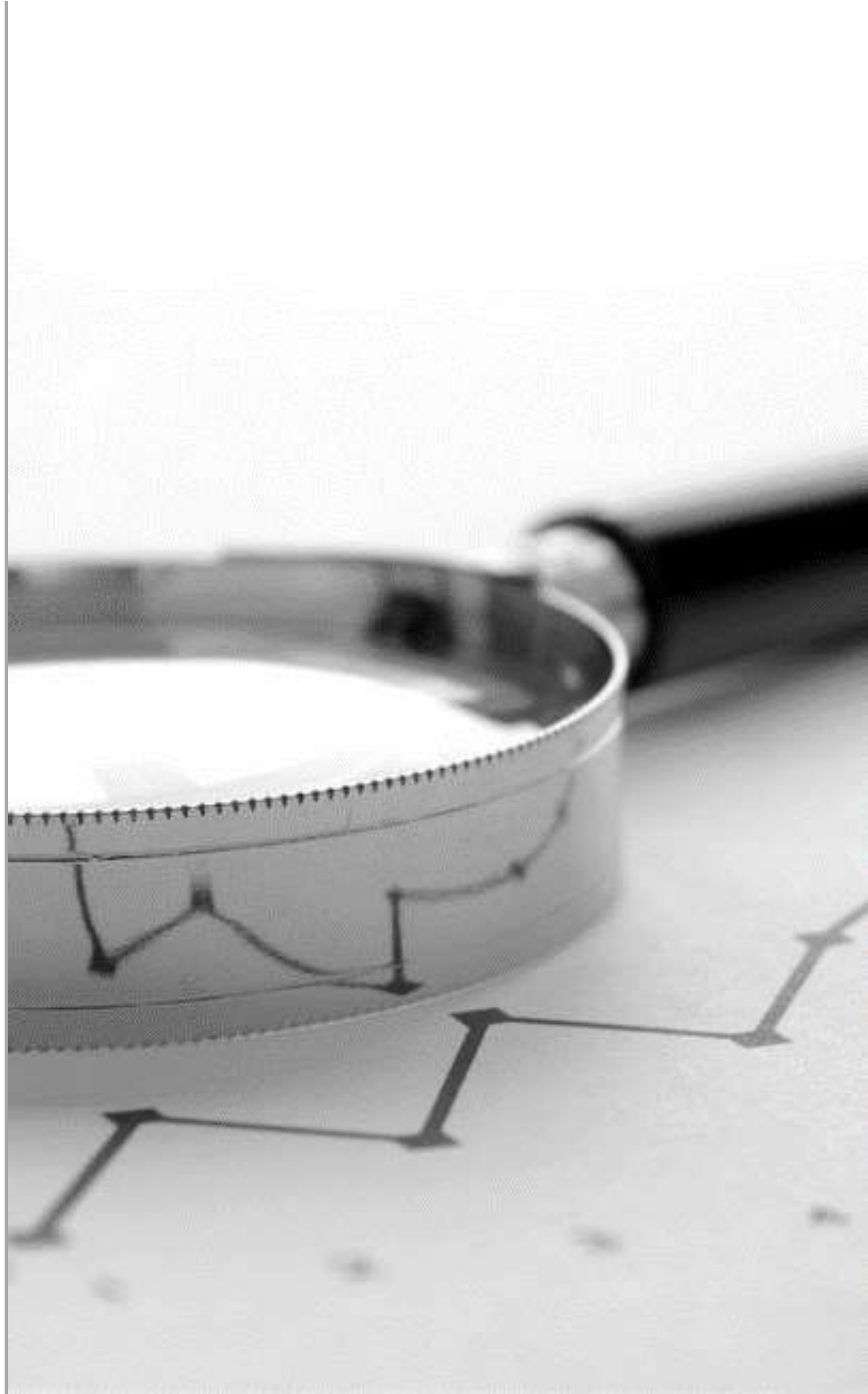
Preface

Management summary

Profiling the building contractor

Theme part: Digitalisation and BIM

Appendix



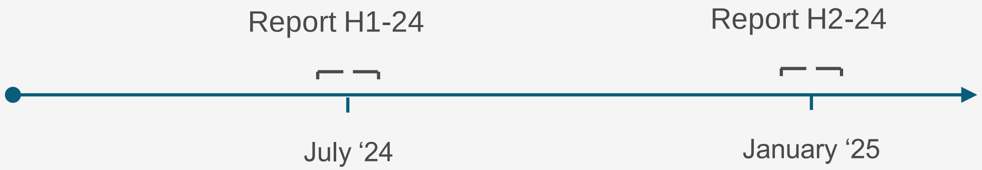
About European Contractor Monitor – BIM

COUNTRY SCOPE

Total of 940 Phone interviews

Background characteristics of the interviewed respondents can be found in the country-specific profiling the contractor chapter.

THE TIMELINE



DEFINITIONS USED

In this report, we also go into detail about the usage of BIM. For BIM we used the following definition: “BIM (Building Information Modeling) is a collaborative digital process for designing, constructing, and managing buildings throughout their lifecycle”.

About target group & methodology

Surveying construction companies…

Mid-sized (5 to 15 employees) and **large** (more than 15 employees) building contractors who are active both in residential and non-residential segments are interviewed. Most interviews are conducted with owners/ directors or with purchasers of these companies.

… selected from a country-representative database

USP possesses an **international database of construction companies**, which is constantly updated. Therefore, respondents are not part of a fixed panel; the sample varies from wave to wave.

… through phone interviews, by native-speaking agents

Phone surveys are the best approach for obtaining a sufficient sample in order to provide insights that can be relied upon. These phone calls are made **by fixed fieldwork partners, located in the respective countries.**

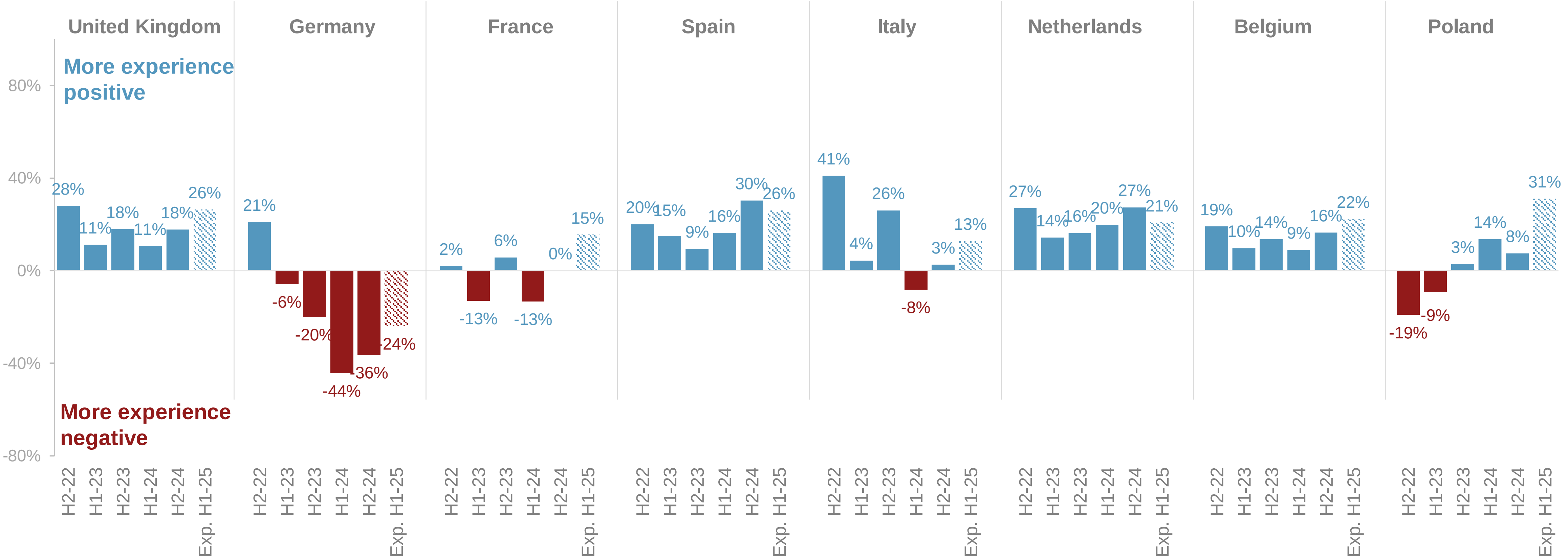
… centralised and continuous quality control

Results in each country are monitored by the USP project team throughout the fieldwork period. We implement our extensive experience in order to **make sure the answers are of high quality and provide the insights that meet the goal of the project.**

Turnover development

Net share of contractors' experience regarding turnover
If you compare your turnover of H2-24 to H2-23, how did your turnover develop?
What are your expectations for the development in H1-25 compared to H1-24?

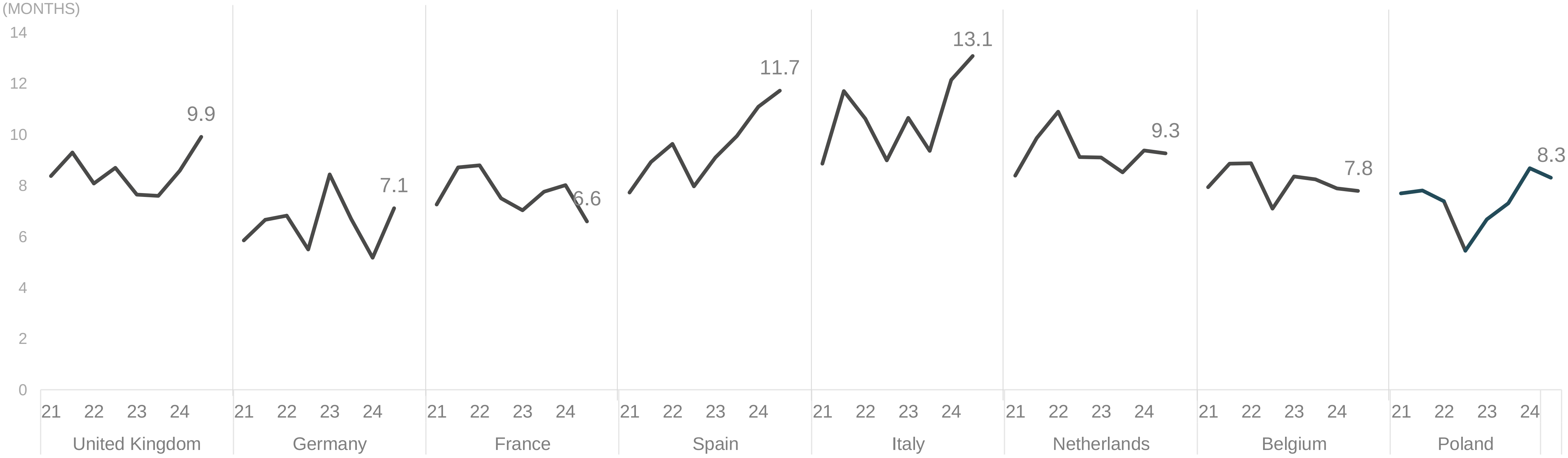
(Share of contractors reporting INCREASE minus the share of contractors reporting DECREASE in their turnover)



*Results are weighted: Turnover development N = 889; Expectations N = 888

Order book portfolio

Order book portfolio
How big (in months) is your current order book portfolio?
[*So how many months can you keep your current staff working?*]

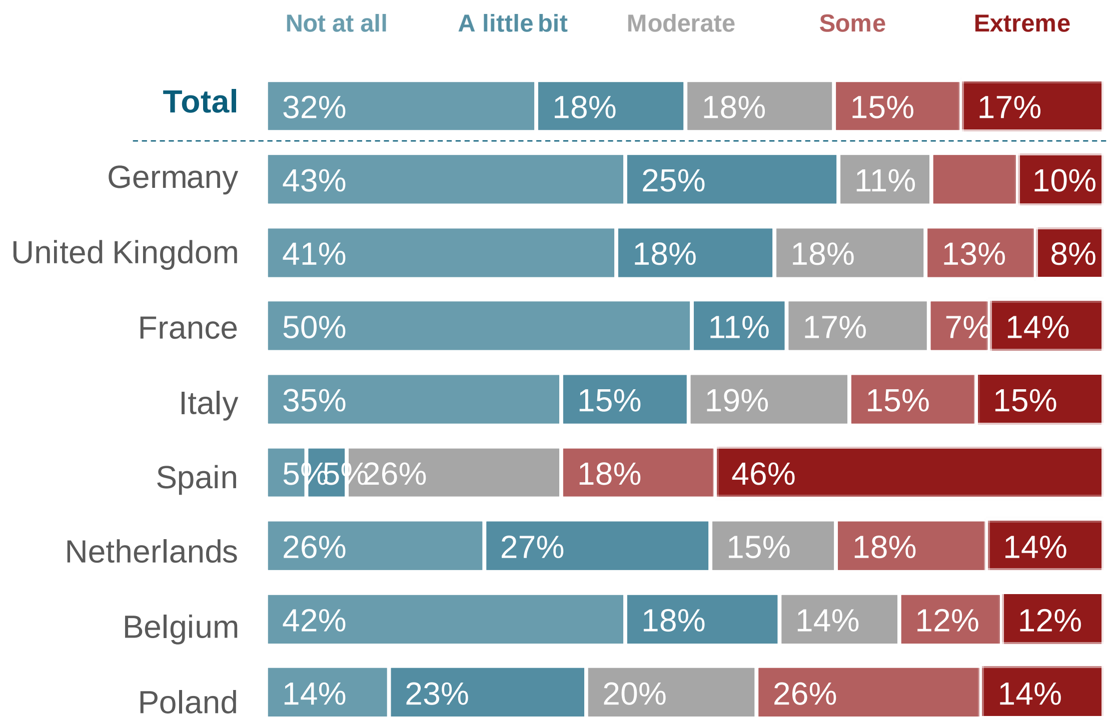


*Results are weighted: Actual N = 884

Labour shortage

In general, 32% of European respondents stated that there is some or extreme labour shortage in their countries, which was 27% in the previous wave. The smallest labour shortage is seen in France, Germany and United Kingdom, while the biggest is seen in Spain and Poland.

Labor shortage
To what degree do you face labour shortage for this year in your company?



Total of no shortage and some or extreme shortage

	H2-24		H1-24		H2-23		H1-23	
Total	32%	32%	31%	27%	30%	33%	25%	35%
Germany	43%	21%	43%	15%	37%	36%	24%	27%
United Kingdom	41%	21%	34%	14%	36%	26%	25%	30%
France	50%	21%	39%	23%	27%	32%	23%	42%
Italy	35%	30%	31%	30%	30%	36%	26%	33%
Spain	5%	65%	7%	55%	19%	49%	16%	63%
Netherlands	26%	32%	32%	22%	26%	19%	32%	33%
Belgium	42%	24%	44%	21%	32%	35%	28%	36%
Poland	14%	41%	19%	36%	30%	29%	28%	18%

**Actual N=951 Belgium N=100; France N=125; Germany N=126; Italy N= 125; Netherlands N=100; Poland N=125; Spain N=125; United Kingdom N=125

Advantages of BIM by country

Main advantages of BIM

What do you consider the greatest advantages of BIM?

	Total	5 to 14	Over 15	GE	UK	FR	IT	ES	NL	BE	PL
All information together	10%	**8%**	**12%**	9%	**13%**	2%	**34%**	6%	8%	5%	0%
Efficiency	10%	7%	**12%**	7%	9%	**13%**	22%	6%	15%	4%	1%
Error-free designs	9%	7%	11%	3%	6%	8%	25%	5%	12%	**8%**	**3%**
Better planning	7%	6%	8%	**16%**	6%	5%	9%	6%	3%	7%	2%
Better collaborative working	6%	5%	8%	9%	2%	8%	1%	6%	18%	7%	2%
More overview/ insight/ control	5%	5%	7%	2%	2%	2%	2%	**11%**	**19%**	6%	2%
Design and detailed plans made more quickly	3%	3%	2%	2%	5%	5%	5%	4%	2%	2%	0%
Lower failure costs	3%	2%	4%	0%	1%	2%	2%	0%	**19%**	3%	0%
Quicker lead time of projects	3%	3%	2%	3%	2%	5%	2%	1%	3%	4%	1%
Other	20%	19%	23%	7%	26%	0%	6%	42%	52%	22%	14%
Don’t know	59%	63%	54%	63%	61%	69%	34%	58%	26%	67%	89%

Total N=951: Belgium N=100; France N=125; Germany N=126; Italy N=125; Netherlands N=100; Poland N=125; Spain N=125; United Kingdom N=125; 5-15 FTE N=547; 16+ FTE N=404.

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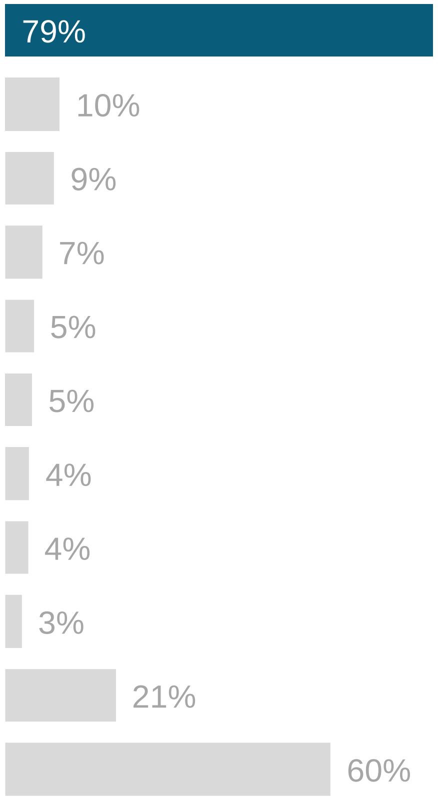
Pain points of BIM by country

Main disadvantages of prefab

In your opinion, what are the main challenges or pain points of BIM elements?



	Total	5 to 14	Over 15	GE	UK	FR	IT	ES	NL	BE	PL
Exchangeability	**79%**	**82%**	**77%**	**88%**	**77%**	**100%**	**90%**	**64%**	**48%**	**73%**	**88%**
Too complex	10%	10%	10%	23%	3%	10%	24%	4%	4%	8%	2%
Requires financial investment / too expensive	9%	7%	11%	5%	8%	1%	27%	6%	12%	11%	3%
Takes more time	7%	5%	9%	10%	8%	7%	4%	3%	14%	9%	1%
Requires training/ gaining knowledge	5%	4%	7%	5%	3%	9%	2%	8%	7%	8%	1%
Not all parties already (can) work with BIM	5%	3%	7%	6%	3%	1%	9%	6%	10%	2%	2%
Not always appropriate	4%	5%	4%	17%	5%	2%	6%	0%	1%	3%	0%
Difficult to understand, not clear what BIM is	4%	4%	4%	5%	8%	5%	2%	0%	2%	7%	6%
Requires a lot of information (in an early stage)	3%	2%	4%	2%	4%	3%	2%	5%	5%	2%	1%
Other	21%	18%	23%	12%	23%	0%	10%	36%	52%	27%	12%
Don't know	60%	65%	55%	45%	60%	74%	42%	72%	44%	55%	86%

Total N=951: Belgium N=100; France N=125; Germany N=126; Italy N=125; Netherlands N=100; Poland N=125; Spain N=125; United Kingdom N=125; 5-15 FTE N=547; 16+ FTE N=404.

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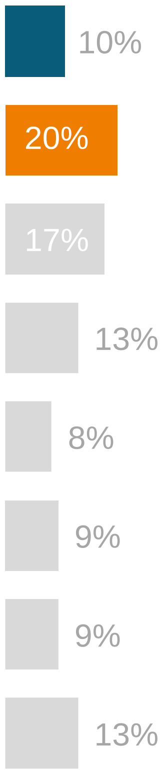
Year of BIM start by country

Year of BIM start in the company

When did your company started to work with BIM?

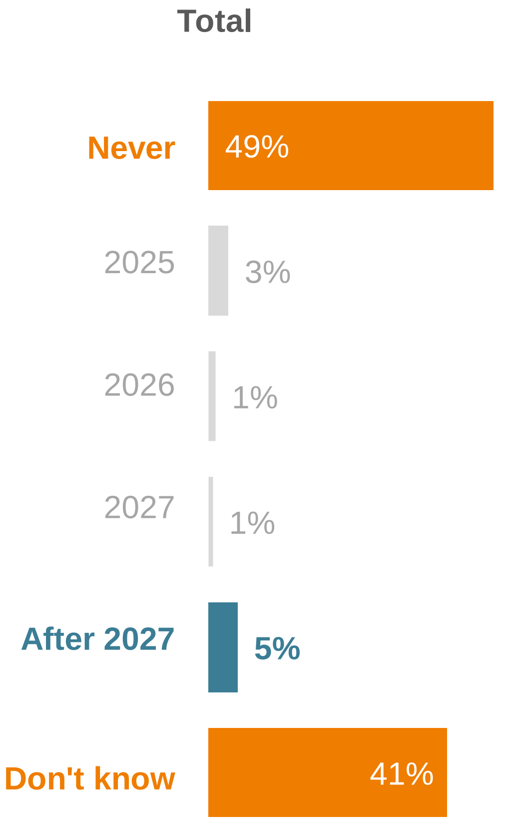


	Total	5 to 14	Over 15	GE	UK	FR	IT	ES	NL	BE	PL
2023-2024	10%	13%	10%	0%	0%	**29%**	**40%**	15%	5%	0%	**50%**
2021-2022	20%	**39%**	13%	0%	14%	**29%**	**40%**	**31%**	18%	20%	25%
2019-2020	17%	9%	**21%**	**27%**	**29%**	14%	20%	8%	18%	10%	0%
2017-2018	13%	4%	16%	9%	7%	0%	0%	**31%**	18%	0%	25%
2015-2016	8%	17%	5%	9%	14%	0%	0%	0%	9%	20%	0%
2013-2014	9%	4%	11%	9%	7%	14%	0%	0%	14%	20%	0%
Sooner	9%	4%	11%	9%	0%	0%	0%	0%	18%	30%	0%
Don't know	13%	9%	14%	36%	29%	14%	0%	15%	0%	0%	0%

Total N=86: Belgium N=10; France N<10; Germany N=11; Italy N<10; Netherlands N=22; Poland N<10; Spain N=13; United Kingdom N=14; 5-15 FTE N=23; 16+ FTE N=63.

Future BIM start by country

Future BIM start
When will your company start using BIM?



	5 to 14	Over 15	GE	UK	FR	IT	ES	NL	BE	PL
Never	52%	45%	56%	39%	35%	93%	34%	50%	40%	40%
2025	3%	4%	0%	5%	1%	4%	7%	5%	3%	3%
2026	1%	2%	0%	0%	1%	0%	2%	6%	1%	1%
2027	1%	1%	1%	3%	0%	0%	1%	1%	0%	0%
After 2027	4%	6%	3%	11%	0%	0%	10%	13%	7%	1%
Don't know	40%	43%	40%	43%	64%	3%	46%	24%	49%	55%

Total N=859; Belgium N=90; France N=118; Germany N=112; Italy N=120; Netherlands N=78; Poland N=119; Spain N=112; United Kingdom N=110; 5-15 FTE N=523; 16+ FTE N=336.

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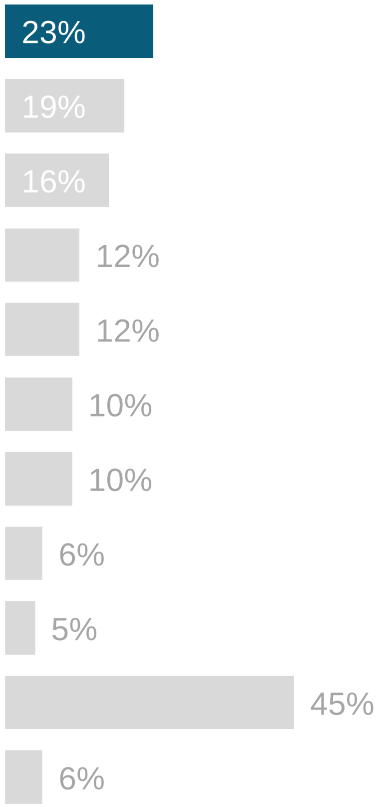
Reasons for BIM usage by country

Reasons for using BIM

Why did your organization start using BIM?



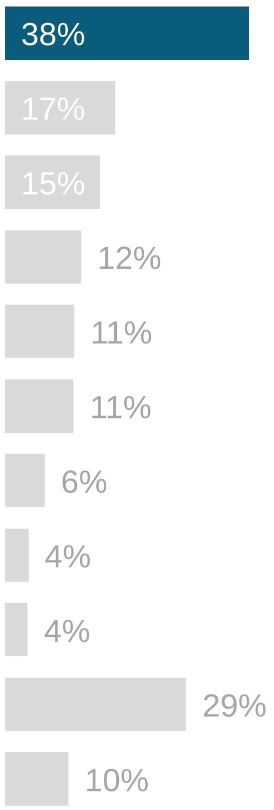
	Total	5 to 14	Over 15	GE	UK	FR	IT	ES	NL	BE	PL
Public clients demanded it	23%	9%	**29%**	36%	**43%**	29%	20%	15%	9%	**20%**	25%
Optimize own business process	19%	17%	19%	36%	0%	14%	**40%**	8%	23%	**20%**	25%
Optimize internal organization	16%	**22%**	14%	**45%**	0%	14%	**40%**	8%	18%	0%	25%
Forced by the market / other parties also work with BIM	12%	4%	14%	9%	14%	29%	0%	8%	14%	10%	0%
Project accuracy/ quality control	12%	13%	11%	0%	7%	0%	0%	8%	**27%**	10%	25%
Real estate developers / investors / building owners demanded it	10%	9%	11%	9%	14%	**57%**	0%	0%	0%	10%	25%
Because of future expectations	10%	13%	10%	27%	7%	14%	0%	8%	14%	0%	0%
Technological adaptation/ innovation	6%	9%	5%	0%	0%	0%	0%	**23%**	9%	0%	0%
Public policy / government regulation	5%	0%	6%	18%	7%	14%	0%	0%	0%	0%	0%
Other	45%	43%	46%	0%	43%	0%	20%	77%	68%	50%	50%
Don't know	6%	9%	5%	9%	21%	0%	0%	0%	0%	10%	0%

Total N=86: Belgium N=10; France N<10; Germany N=11; Italy N<10; Netherlands N=22; Poland N<10; Spain N=13; United Kingdom N=14; 5-15 FTE N=23; 16+ FTE N=63.

Reasons for not using BIM by country

Reasons for not using BIM

Why is your organization not (yet) started with using BIM?



	Total	5 to 14	Over 15	GE	UK	FR	IT	ES	NL	BE	PL
Not aware of BIM	38%	**41%**	**35%**	**45%**	**29%**	**62%**	**51%**	**17%**	6%	**46%**	**41%**
Have not considered it yet	17%	16%	**19%**	6%	8%	**80%**	3%	4%	6%	10%	13%
Small company	15%	**18%**	10%	13%	**15%**	45%	**16%**	8%	10%	8%	1%
Type of work doesn't require BIM	12%	11%	13%	4%	9%	0%	8%	**23%**	**35%**	9%	**16%**
Projects are too small	11%	13%	8%	20%	4%	20%	**16%**	4%	**12%**	7%	4%
BIM offers no benefits for the company	11%	12%	10%	**21%**	9%	8%	2%	13%	4%	**21%**	10%
Commercial clients don't ask for BIM	6%	5%	9%	5%	**15%**	8%	3%	4%	8%	8%	3%
The investments are too big	4%	4%	4%	7%	1%	3%	3%	4%	8%	4%	2%
It takes time	4%	4%	4%	8%	0%	9%	3%	3%	3%	3%	0%
Other	29%	26%	32%	13%	25%	0%	18%	50%	78%	33%	29%
Don't know	10%	10%	10%	9%	17%	2%	5%	17%	5%	6%	18%

Total N=859: Belgium N=90; France N=118; Germany N=112; Italy N=120; Netherlands N=78; Poland N=119; Spain N=112; United Kingdom N=110; 5-15 FTE N=523; 16+ FTE N=336.

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