«Digital Next Gen Trendmonitor 2026»

Whitepaper – English

May 2026

BAUEN DIGITAL SCHWEIZ
BÂTIR DIGITAL SUISSE
COSTRUZIONE DIGITALE SVIZZERA
CONSTRUIR DIGITAL SVIZRA

Home of buildingSMART Switzerland

Table of Contents

Preface

Dear Readers,

The era of digital experiments is over. After years of technological euphoria, the Swiss construction industry has reached the demanding phase of industrial scaling. Practice clearly shows that merely introducing new software does not bring about transformation. Technological excellence fizzles out without the accompanying cultural shift, clean data structures, and, above all, the adequate strategic allocation of investments.

With this «Digital Next Gen Trendmonitor 2026, we present you with a practical instrument and a data-driven strategic compass. Our methodological approach is "Dialog and Data": we combine the quantitative facts of the Digital Real Estate & Construction Study 2026 by pom+Consulting AG—with an exclusive focus on the construction industry—with the qualitative insights of industry-leading expert workshops.

The resulting findings act as a necessary reality check. They demonstrate a growing discrepancy between strategic ambition and operational execution. The technologies, from Artificial Intelligence to physical automation, are ready. What is often missing is the consistent empowerment of employees as well as the willingness to escape the so-called "pilot trap" and make targeted investments in value-creating use cases.

This report consistently separates short-term hypes from genuine economic value. It is intended to encourage you to invest in the right foundations and to establish a leadership culture that understands digital transformation as an ongoing strategic task.

The digital future of the construction industry belongs to those who are willing to radically rethink processes. We wish you an inspiring read and the entrepreneurial courage to scale.

Sincerely,

Gianluca Genova
Lead EG Digital Next Gen
VSA BdCH / bSCH,
CEO, MetaXD AG

Nicolo Guariento
Co-Lead EG Digital Next Gen
Team Lead Development & Digitalization
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Management Summary

Digitalization at a Crossroads: From Experimentation to Industrial Scaling

The Swiss construction industry has left the phase of digital euphoria behind. The «Digital Next Gen Trendmonitor 2026» confirms the entry into a critical phase of consolidation. The era of non-binding pilot projects is over; the transition to a comprehensive renewal of the value chain is now critical for maintaining market competitiveness.

The Problem: Stagnation and Legacy IT Systems More than half of the companies (53%) report stagnation. This is not a failure, but a necessary cleanup: managing outdated, isolated IT solutions (legacy systems) currently ties up massive resources and blocks rapid innovation leaps.

The Analysis: Investment Backlog and Talent Deployment

- **The Prioritization Paradox:** Although high costs represent the biggest obstacle for 38% of the industry, 51% of the companies invest a maximum of 1% of their annual revenue. Capital flows primarily into maintaining the status quo rather than into value-creating innovations.
- **Leadership Issue Instead of Talent Shortage:** For 51%, the shortage of skilled workers is not a primary obstacle. The industry suffers from an «inefficient talent deployment: digital talents encounter rigid structures, which require a cultural shift through «bottom-up enablement.

The Insights: Data Hygiene and Individualized Serial Production

- **Data Hygiene before AI:** Artificial Intelligence raises enormous expectations (71% see high value) but often fails operationally due to poor data quality. A clean data foundation is the mandatory prerequisite for intelligent algorithms.
- **End-to-End Digital Manufacturing:** Platforms and BIM have established themselves as standard (>50% operational use). The true return on investment (ROI) of the future lies in individualized serial production (mass customization) through the direct linking of digital models with production machines.

Actionable Recommendations at a Glance

Hard key performance indicators (KPIs such as project margin) are essential for future technologies. Increasing innovation budgets to **3 to 5% of revenue** secures the strategic transformation. In addition, legal certainty in AI decisions and clear contract models for data ecosystems must be prioritized by executive management.

1 Introduction and Project Context

1.1 The Mission: "Digital Next Gen"

1.1.1 Initial Situation

The era of digital experiments is over. The Swiss construction and real estate industry is currently entering the era of industrial scaling. Those who do not now transition from pure process optimization to a profound renewal of the value chain will lose their competitive edge.

The digital economy is a central growth driver worldwide. However, the local construction and real estate sector faces structural hurdles. In partnership with pom+Consulting AG and Bauen digital Schweiz / buildingSMART Switzerland, this Trendmonitor places a specific focus on the construction industry for the very first time. The analyses demonstrate a clear discrepancy between strategic ambition and operational reality. The industry does not primarily lack new technologies, but rather needs to overcome data fragmentation, inadequate interfaces, and a significant investment gap.

A Balanced Approach: Data, Dialog, and Expertise To draw a holistic picture of the transformation and to separate technological hypes from genuine added value, this report is based on three equal pillars:

1. **Quantitative Industry Study:** The data foundation is formed by the Digital Real Estate & Construction Study (DREC Study). To accurately map the specific scope of industrial scaling, our analysis focuses exclusively on a targeted sample of 69 participants from the construction industry. Because this industry-specific focus was previously only recorded integratively (via roles such as "planner" or "contractor"), the figures presented here deviate from the overall study. Consequently, this survey establishes a new baseline, which is why historical comparisons are deliberately omitted. The ambition is to repeat this specific evaluation annually in the future.
2. **Qualitative Expert Workshops:** Bare numbers do not explain causes. Therefore, practical workshops with industry leaders form the second foundation to qualitatively contextualize technologies on the frontline—from the construction site to the factory floor.
3. **Expert Interviews:** In-depth discussions with thought leaders from practice and research round off the picture and validate the findings.

The present Trendmonitor thus serves as a strategic compass for decision-makers. The core objectives include:

- **Creating a basis for decision-making:** Linking quantitative market data and qualitative expert knowledge for well-founded investment decisions.
- **Contextualizing key technologies:** Analyzing the market maturity of Artificial Intelligence, robotics, smart sensors, and cloud technologies specifically for the Swiss market.
- **Deriving recommendations for action:** Formulating concrete measures for the efficient shaping of structural change.

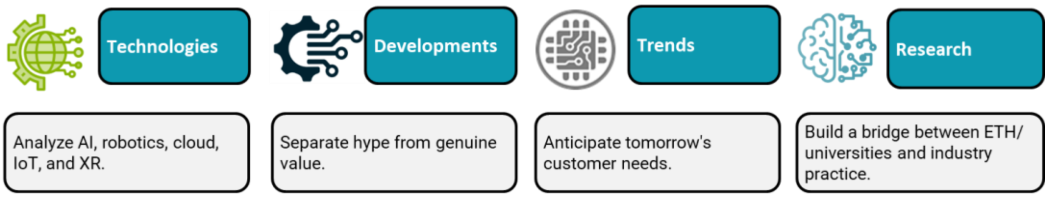


Image 1: The mission of the "Digital Next Gen" initiative: connecting technology, market development, and research.

1.1.2 The Role of the Expert Group

The "Digital Next Gen" Expert Group acts as a bridge to prepare the industry for the digital future. It unites technological professionals to evaluate approaches such as artificial intelligence, sensor technology, and data networks for their practical utility in terms of efficiency and sustainability.

Through close collaboration with companies, research institutes like ETH Zurich, and international networks like buildingSMART, the group develops applicable solutions. A key focus is the active transfer of knowledge through practical workshops, bringing research findings directly into the daily operations of companies.

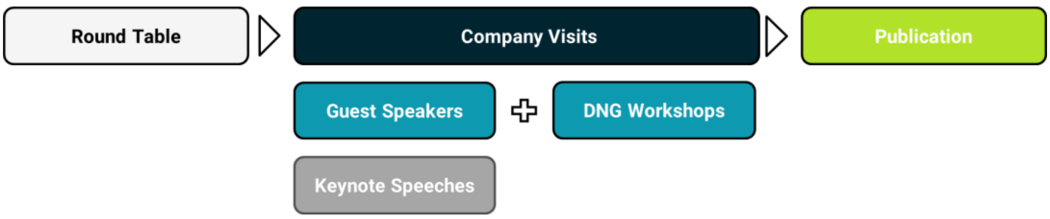


Image 2: The Methodological Approach – Linking industry-wide dialog and a solid data foundation

1.2 The Shortage of Digital Professionals as a Driver of Transformation

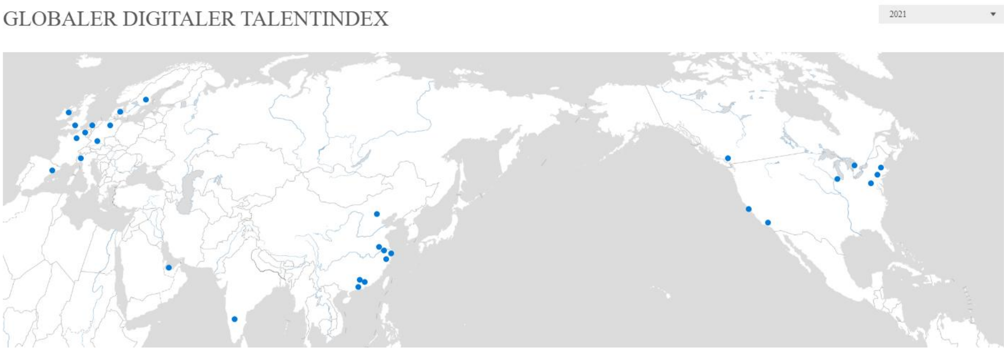


Image 3: Global distribution of professionals with core digital skills (Quelle: Tsinghua School of Economics and Management & LinkedIn Economic Graph) - https://cidg.sem.tsinghua.edu.cn/

A central bottleneck of the digital transformation is the human factor. The primary challenge for the construction industry is less a general shortage of skilled workers, but rather the lack of specific digital expertise in key positions. Global analyses of professional networks prove a fundamental market dynamic: there is a significant transfer of talents into classic user industries.

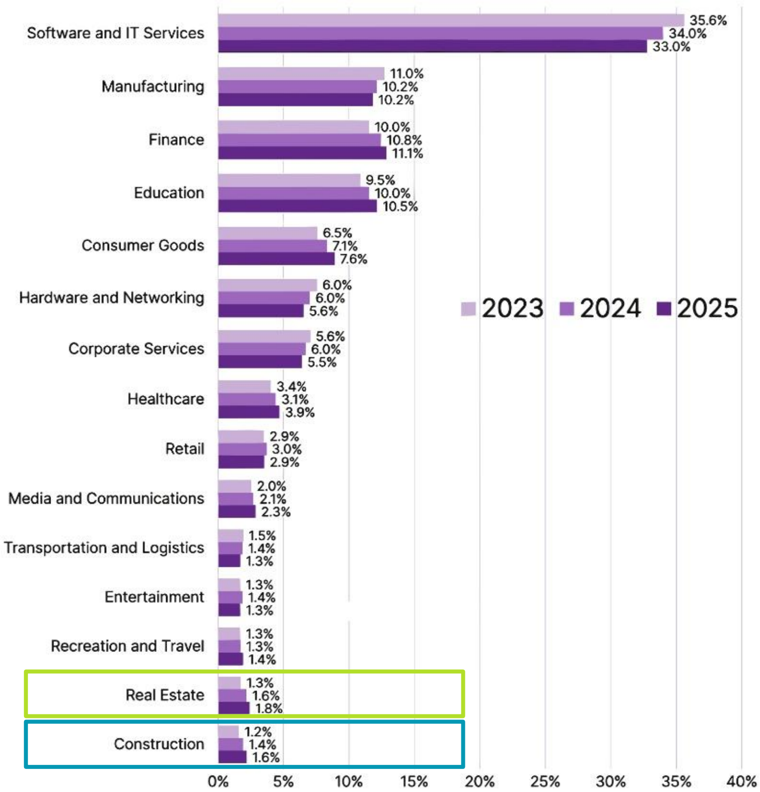


Abbildung 4: LinkedIn Economic Graph & Tsinghua University Center for Internet Development and Governance (CIDG), «Global Digital Talent Development Report 2025».

Traditional information technology sectors such as software and IT services are recording a measurable decline in their share of digital talents—from 35.6% in 2023 to 33.0% in 2025. In parallel, non-industry sectors such as finance or education are growing strongly as they increasingly integrate these digital professionals into their core business.

In cross-industry comparisons, the construction industry continues to have the absolute lowest density of digital specialists. At the same time, the current dynamic holds great potential: with an increase from 1.2% in 2023 to 1.6% in 2025, the industry is currently recording the strongest relative growth in digital talents compared to the other sectors examined.

Although the existing deficit hinders the industry's innovative strength and complicates the scaling of new business models, this starting position conceals a significant lever. The targeted deployment of highly qualified professionals in data architecture or automation can unfold a disproportionate impact on productivity. This applies in particular to the intelligent linking of digital use cases in BIM models with Artificial Intelligence methods.

2 Methodology and Data Basis

The present Trendmonitor relies on a methodologically robust framework that links quantitative market data with qualitative expert insights. This "Dialog and Data" approach ensures that technological developments are not viewed in isolation but are critically scrutinized and tested for their actual economic value. To draw a holistic picture of the digital transformation and avoid the blind spots of purely statistical surveys, the report utilizes a combination of three data sources:

- **Quantitative Basis - Industry Study:** The data foundation is formed by the Digital Real Estate & Construction Study 2026 by pom+Consulting AG. While this overall study measures the maturity level of the entire construction and real estate industry (DRE-i) based on around 200 assessments, this Trendmonitor focuses exclusively on the construction industry.
- **Qualitative Deep Dive - Expert Workshops:** Bare numbers do not explain causes. Therefore, the Expert Group conducted theme-specific workshops distributed throughout the year to analyze technologies practically using concrete use cases. Focus areas included networked infrastructure and data security (with Sunrise, Huawei, Implenia, Ergon, and the SIA), Artificial Intelligence and data analysis (with Esri, pom+, Amberg, QAECY, and Swissgrid), as well as physical realization through industrialized prefabrication (with ERNE and R. Nussbaum).
- **Validation - Expert Interviews:** To sharpen the hypotheses and validate the study results, supplementary in-depth interviews were conducted with thought leaders from research and practice (e.g., ETH Zurich). These helped to objectively

contextualize the discrepancy between technological potential and practical applicability.

3 Status Quo: The Digital Maturity of the Swiss Construction Industry (Study Results)

This chapter provides the data-driven foundation of the Trendmonitor. The results exclusively reflect the responses of professionals and executives from the construction industry. The presentation in this section is purely descriptive.

3.1 Initial Situation and Market Assessment

3.1.1 Participant Structure of the Data Collection

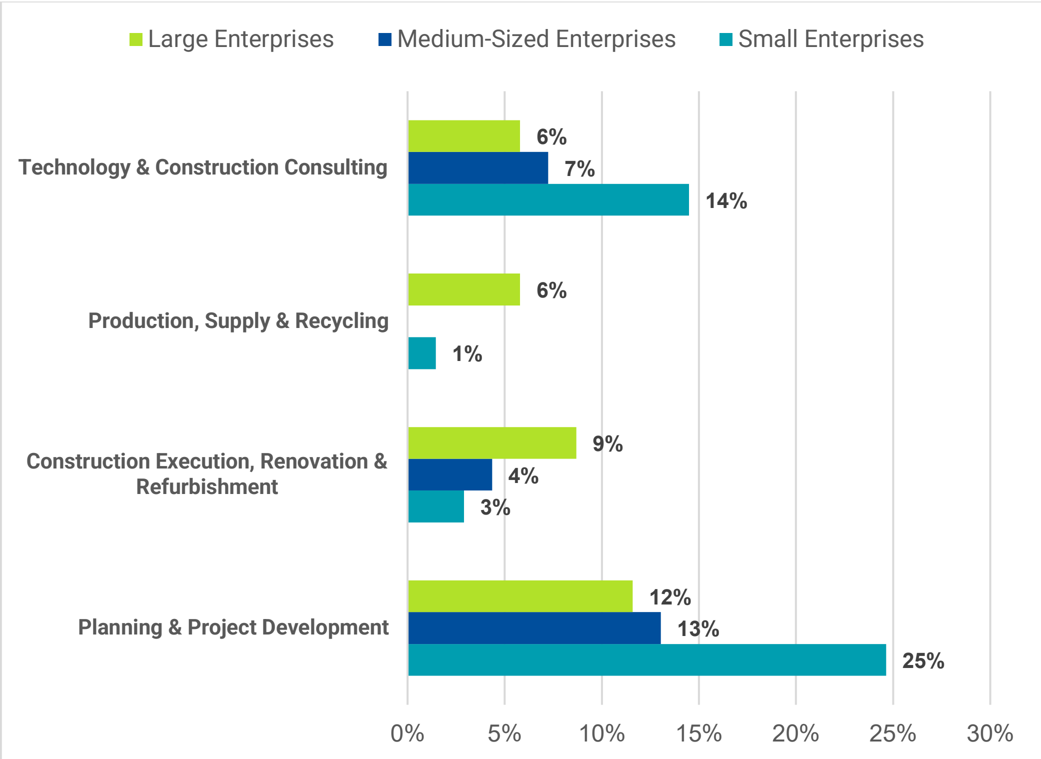


Image 5: Distribution of roles among participating companies across the four central value chain phases. Data basis: Digital Real Estate & Construction Study 2026, pom+Consulting AG. Special analysis for the construction industry (n=69).

The quantitative data basis relies on a targeted sample of **69 professionals and executives**, which reflects the heterogeneity of the Swiss construction industry:

- **Actors from Planning & Project Development** form the largest participant group, accounting for almost half of the respondents (49%). This is followed by companies from Technology & Construction Consulting (28%), Construction Execution, Renovation & Refurbishment (13%), as well as Production, Supply & Recycling (10%).

- **The survey covers the entire market spectrum.** The majority of respondents come from medium-sized enterprises (50 to 249 employees) and small enterprises (under 50 employees). At the same time, almost a third of the responses (32%) represent large enterprises (250 employees or more).

3.1.2 Perception of Digital Development

The assessment of the development of digital maturity paints a cautious picture. Over half of the surveyed companies—specifically **53%—report a stagnation.** They see no notable progress in the digital transformation of their market environment over the past year.

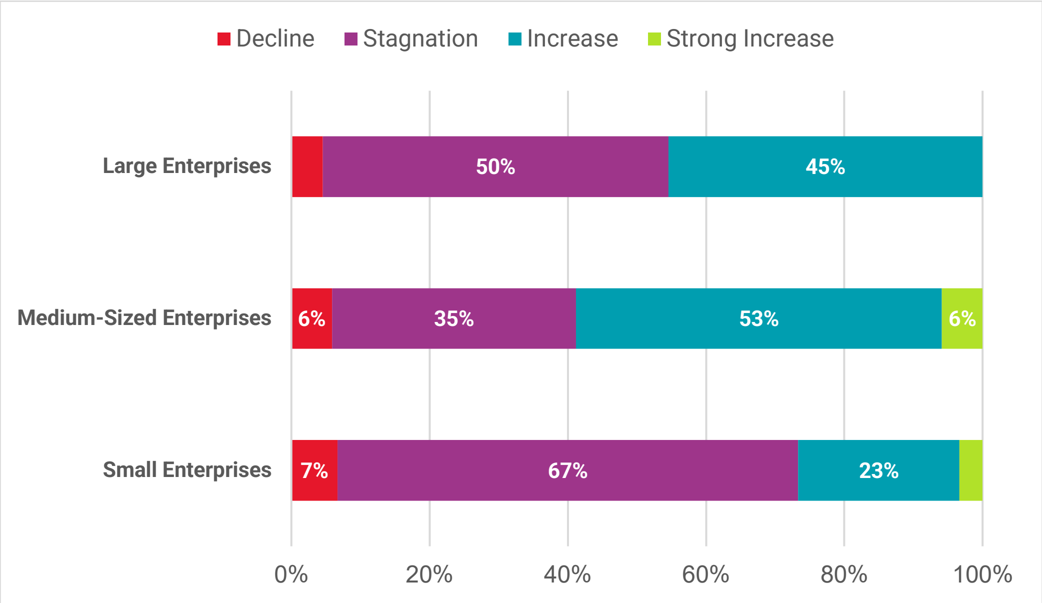


Image 6:) Perceived development of digital maturity differentiated by company size. Data basis: Digital Real Estate & Construction Study 2026, pom+Consulting AG. Special analysis for the construction industry (n=69).

Small enterprises with fewer than 50 employees record the highest stagnation rates at over 67%. A contrasting, highly positive dynamic is evident among medium-sized enterprises (50 to 249 employees). In this segment, a clear majority of nearly **59% perceive an increase** (including a strong increase) in digital maturity. Among large enterprises (over 250 employees), the picture is polarized evenly between stagnation and growth.

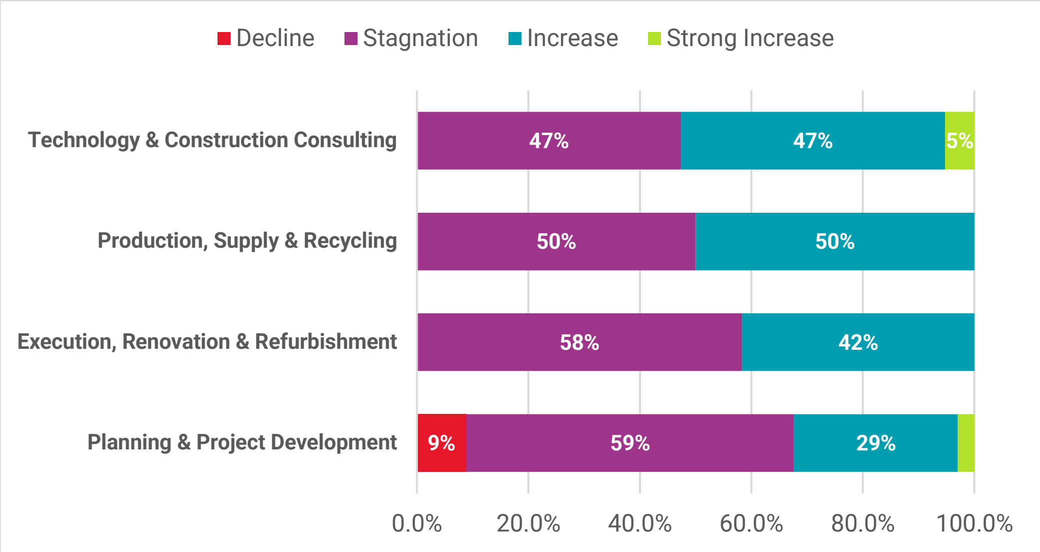


Image 7: Perceived development of digital maturity differentiated by value chain phase. Data basis: Digital Real Estate & Construction Study 2026, pom+Consulting AG. Special analysis for the construction industry (n=69).

The classic core construction disciplines exhibit the greatest hurdles. Both in **Planning & Project Development** and in **Construction Execution, Renovation & Refurbishment**, the majority (around 58% to 68%) note persistent stagnation (including decline). The development is viewed much more positively at the edges of the value chain. In **Production, Supply & Recycling**, 50% of the respondents record an increase in digital maturity.

3.2 Strategy, Drivers, and Financial Reality

3.2.1 Objectives and Strategic Anchoring

The prioritization of digitalization goals highlights the construction industry's clear focus on operational improvements. Strategic innovations are subordinated to the concept of efficiency:

- **Increasing productivity** remains the undisputed top priority with a relevance score of 83% and is identified by respondents as the most important goal of digital transformation.
- This is followed by **increasing quality** (65%) and closely behind, reducing costs (65%). This underscores the prevailing focus on internal process efficiency.

- **Risk minimization** (44%), improving customer experience (44%), and improving sustainability (43%) are classified as secondary priorities.
- It is striking that profound transformation in the form of developing new **business models** (30%) enjoys barely any priority and, along with increasing transparency (27%), ranks at the bottom of the objectives.

Image 8: Primary objectives of digitalization by relevance (100 = highest relevance). Data basis: Digital Real Estate & Construction Study 2026, pom+Consulting AG. Special analysis for the construction industry (n=69).

3.2.2 Drivers of the Digital Transformation

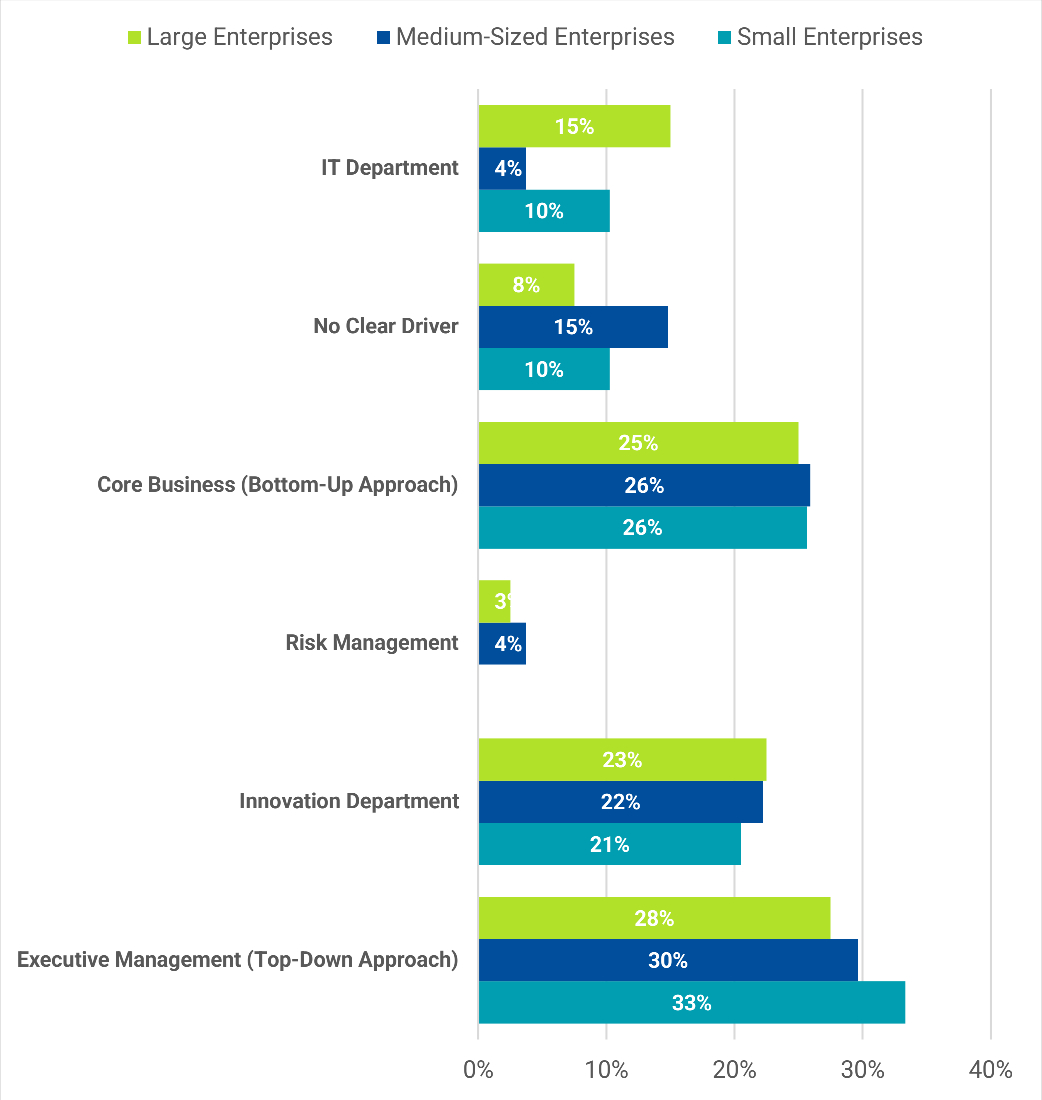


Image 9: Primary drivers of digital initiatives and projects in companies. Data basis: Digital Real Estate & Construction Study 2026, pom+Consulting AG. Special analysis for the construction industry (n=69).

Responsibility for digital initiatives shows a clear industry-wide preference for top-down approaches as well as impulses from the core business. The detailed analysis by company size reveals specific structural patterns:

- **Executive Management as the engine (top-down):** Acts as the strongest driver across all company sizes (28% to 33%). However, without involving the grassroots level, initiatives risk bypassing operational reality.
- **Core business as the practical driver (bottom-up):** Establishes itself extremely consistently across the industry (approx. 25%) as the second force. Use cases emerge directly in the specialist departments out of concrete operational pain points.

- **Specialized departments:** Dedicated innovation departments drive transformation in about a fifth of the companies. The IT department assumes this strategic role almost exclusively in large enterprises (15%).
- **Lack of responsibilities:** Particularly in SMEs (10 to 15%), there is often a lack of a "clear driver." This vacuum poses a direct risk of transformation stagnation.

3.2.3 Investment Readiness

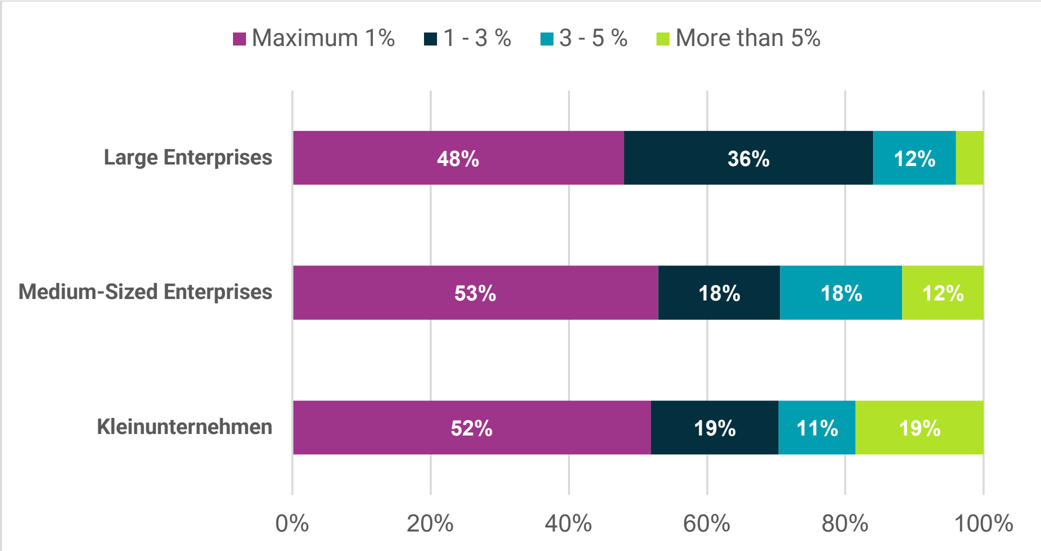


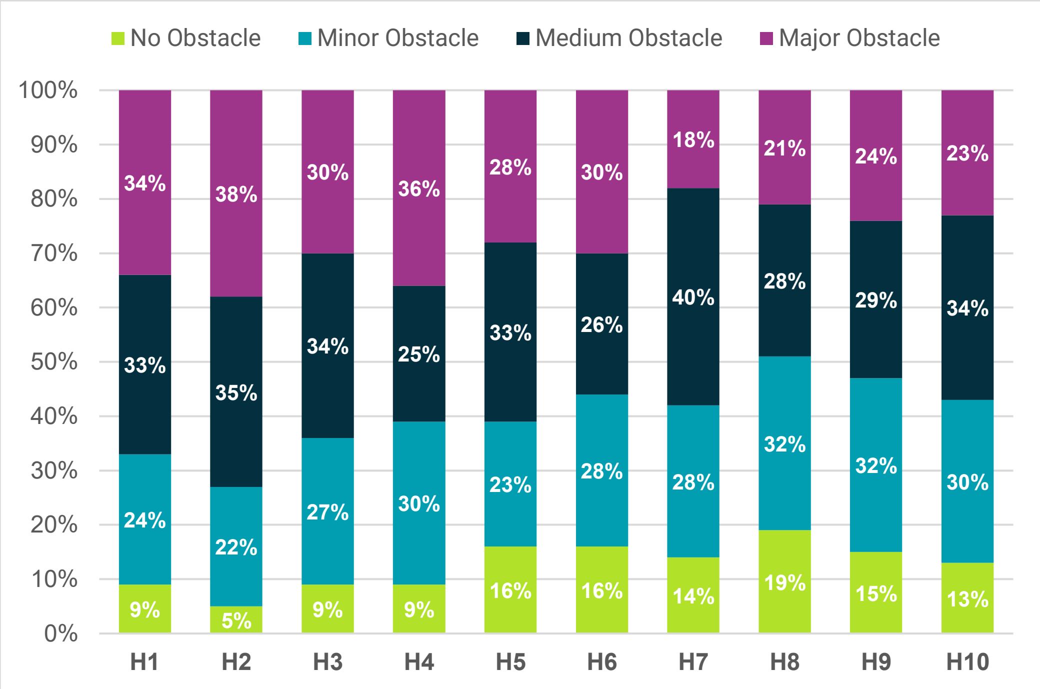
Image 10: Share of annual revenue invested in digital transformation. Data basis: Digital Real Estate & Construction Study 2026, pom+Consulting AG. Special analysis for the construction industry (n=69).

The willingness to allocate financial resources for digital initiatives (excluding traditional IT infrastructure) reveals a clear strategic dichotomy in the market:

- **The 1% hurdle (Defensive Digitalization):** Nearly half of the companies (49%) invest a maximum of 1% of their annual revenue in digital transformation. For a large part of the industry, this high share indicates a preservative strategy that primarily manages the status quo rather than leading innovation.
- **The midfield:** 27% of companies allocate between 1% and 3% of their revenue. This group mainly comprises large enterprises and companies driving selective initiatives.
- **The investment-strong pioneers (Offensive Digitalization):** Nearly a quarter of the industry (23%) invests more than 3% of its revenue in digital innovation. Notably, agile small enterprises and classic medium-sized companies are strongly represented in this top segment, whereas large corporations act much more cautiously in proportional terms.

3.3 Hurdles and Solution Approaches

3.3.1 Perceived Obstacles



H1	Lack of end-to-end standards & interoperability	H6	Silo thinking & demarcation of competencies
H2	Investments / Costs	H7	Corporate structure and processes
H3	System legacy / Integration of existing systems	H8	Shortage of skilled workers & staff fluctuation
H4	Data availability, security, and sovereignty	H9	Lack of strategic focus
H5	Corporate culture, & change management	H10	Digital competencies of leadership

Image 11: Evaluation of the biggest hurdles to digital transformation. Data basis: Digital Real Estate & Construction Study 2026, pom+Consulting AG. Special analysis for the construction industry (n=69).

When asked about the biggest hurdles to digital transformation, financial aspects and data infrastructure dominate. The analysis of specific study data highlights clear priorities:

- The topics of **investments and costs** are classified as a "major obstacle" by 38% of respondents—the absolute peak value in this survey. In second place follows **data availability, security, and sovereignty** (36% "major obstacle"), closely followed by a **lack of end-to-end standards and interoperability** (34%). Furthermore, "System Legacy" (integration of existing systems) severely hampers almost a third of the companies (30%).
- The evaluation of personnel factors is interesting. The widely discussed industry-wide **shortage of skilled workers and personnel fluctuation** are considered by the majority of surveyed professionals and executives (a combined 51%) to be no obstacle or only a minor one; only 21% rate them as a "major obstacle."

- Factors such as a lack of strategic focus (combined with 47% no/minor obstacle) or insufficient digital competencies of leadership (43% no/minor obstacle) are also currently not perceived by respondents as the most pressing blockers.
- While existing corporate structures and processes are most frequently classified as a "medium obstacle" (40%), they represent a full-blown, major hurdle for only 18% of the companies.

3.3.2 Countermeasures Taken

To overcome the identified hurdles of digital transformation, the industry primarily relies on internal empowerment and structural adjustments rather than mere technology purchases. The breakdown by the three company sizes reveals different strategic focal points:

- **Process optimization and training as the foundation:** These two measures dominate the field across the industry. While small enterprises focus most strongly (around 25%) on optimizing existing processes, training constitutes the primary instrument for internal employee empowerment, particularly for medium-sized enterprises (20%).
- **Change management in the focus of large companies:** The further development of corporate culture and change management are prioritized particularly by large enterprises (nearly 19%) as well as small enterprises (approx. 15%), whereas the mid-market (13%) focuses on this aspect significantly less often.
- **External consulting as a niche solution:** The involvement of external expertise is generally used cautiously and only registers a notable peak among medium-sized enterprises (15% compared to only 7% for large corporations).
- **Technology and capital as secondary levers:** Pure technology introduction (values between 9% and 12%) is rarely seen by companies as an isolated solution approach. Even less frequently is the increase of investments taken as a countermeasure—here the value is below 9% industry-wide, and for large corporations even only 5%. This impressively corroborates the previously identified investment reluctance (1% hurdle).

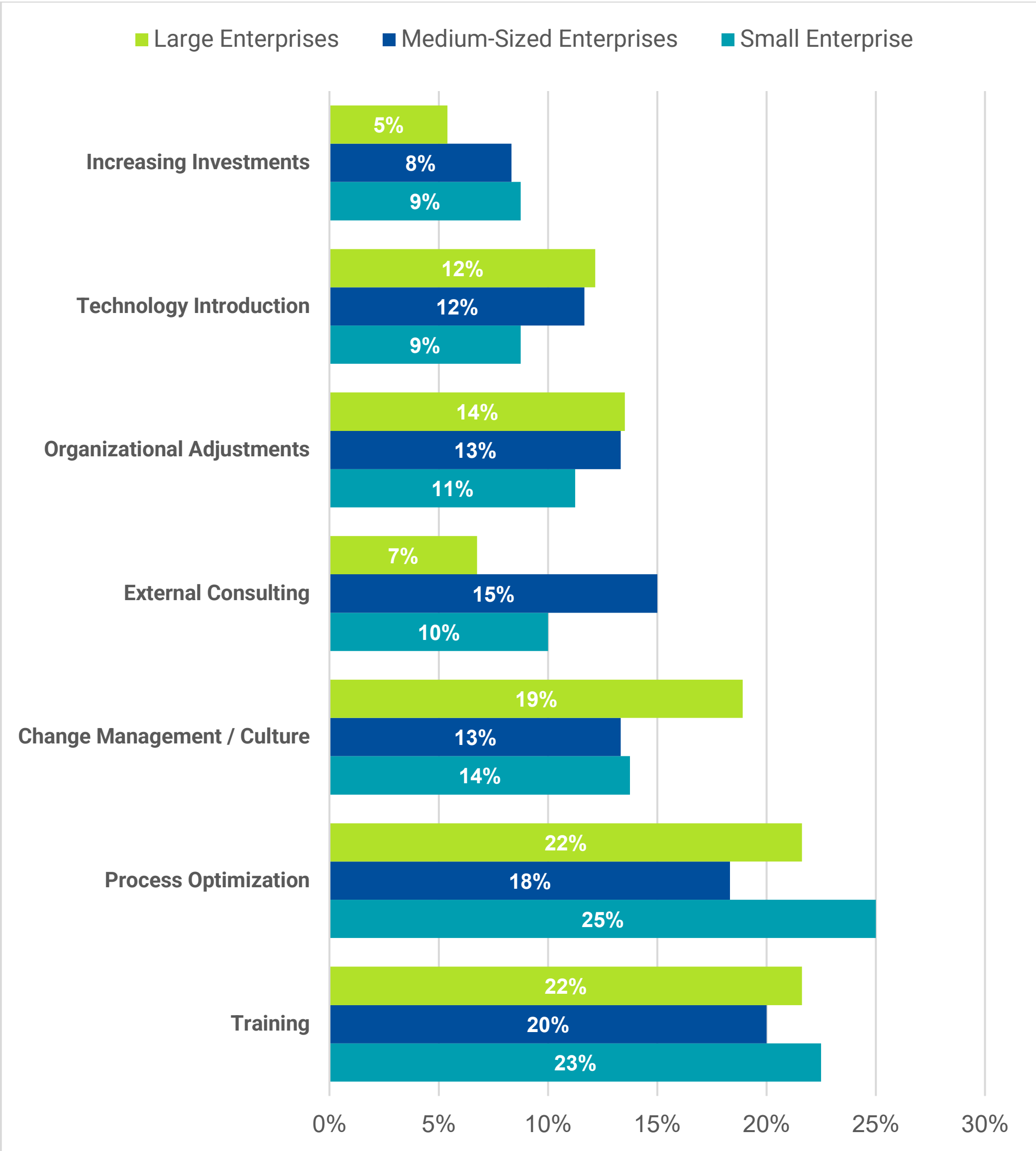


Image 12: Strategic and operational measures taken to overcome digitalization hurdles. Data basis: Digital Real Estate & Construction Study 2026, pom+Consulting AG. Special analysis for the construction industry (n=69).

3.4 Technological Foundation and Maturity Level

3.4.1 Assessment of Technology Utility

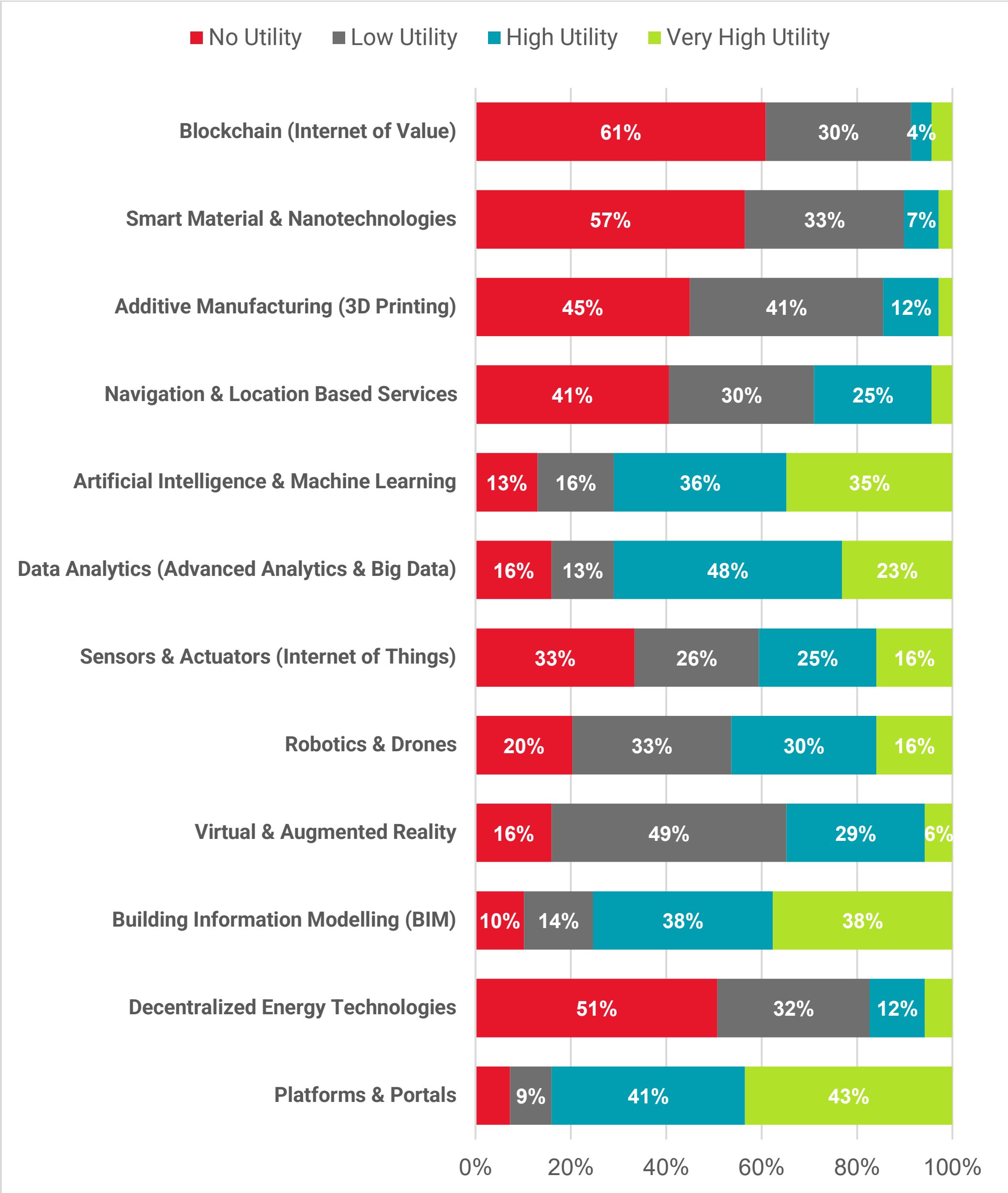


Image 13: Perceived economic utility of key technologies. Data basis: Digital Real Estate & Construction Study 2026, pom+Consulting AG. Special analysis for the construction industry (n=69).

The evaluation of economic utility shows a clear preference in the construction industry for collaborative baseline tools and data-driven technologies, while the added value of experimental hardware and software is currently still viewed skeptically:

- Digital **Platforms & Portals** clearly lead the field; over 84% of respondents attest a high or very high utility to them. **Building Information Modeling (BIM)** establishes itself in the subsequent ranks with around 75% (high/very high utility), along with the forward-looking data technologies Data Analytics and **Artificial Intelligence & Machine Learning** with 71% each.

- Hardware-centric technologies for processing automation polarize more strongly. **Robotics & Drones** as well as the **Internet of Things** (Sensors & Actuators) are classified as highly or very highly useful by 46% and 41% of respondents respectively yet simultaneously exhibit growing skepticism in the market.
- At the lower end of the spectrum are technologies where the industry currently sees no relevant "Return on Investment". For **Blockchain, Smart Materials, and Additive Manufacturing (3D Printing)**, between 85% and 91% of respondents currently recognize no or only very marginal economic utility.
- **Virtual & Augmented Reality (VR & AR)** is also rated by a good 65% of the construction industry as having little to no utility. The same surprisingly applies to **Decentralized Energy Technologies**, of which over 82% currently see no significant lever for their core business.

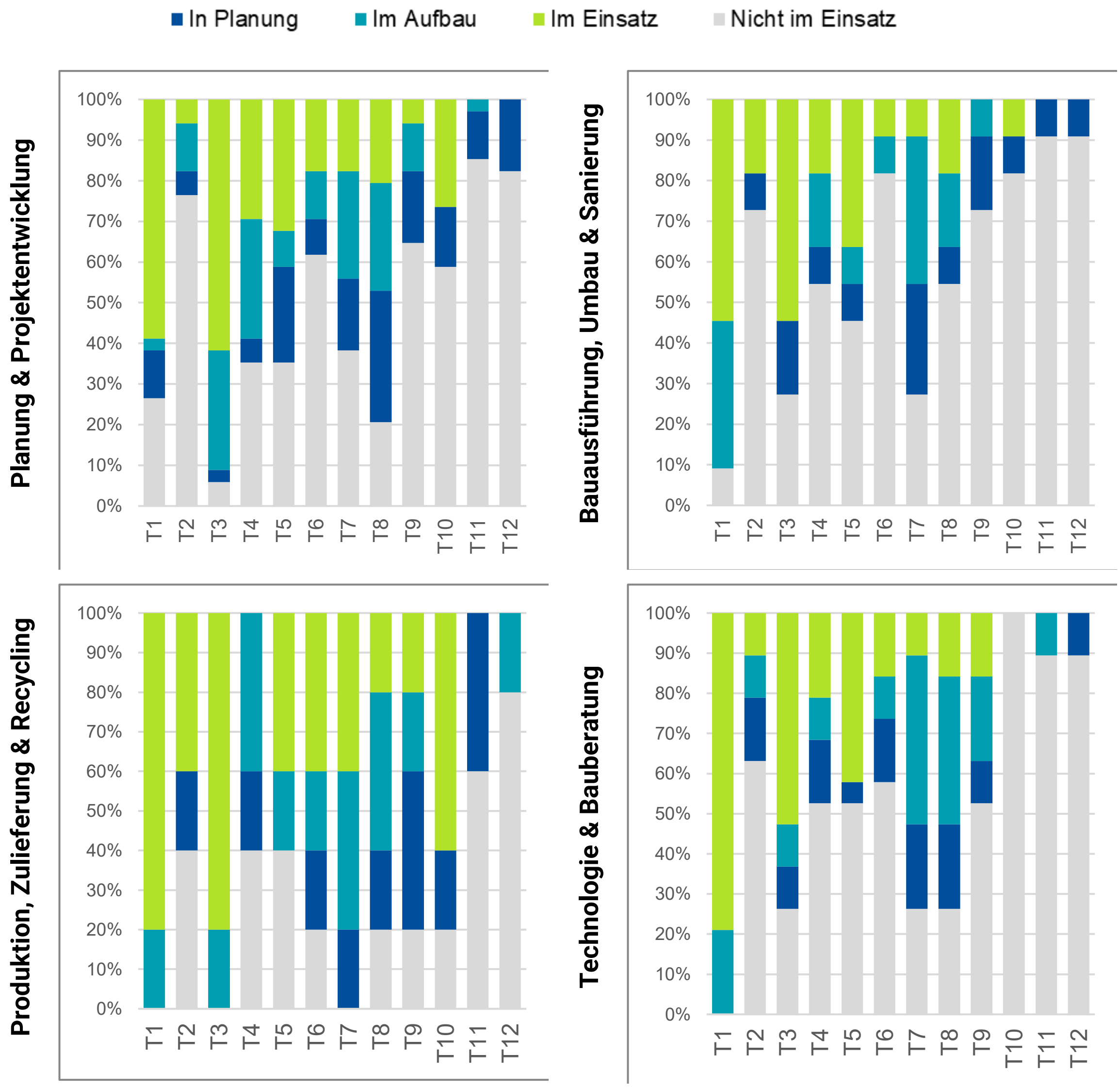
buildagil / B3 digital AG | Moritz Wehrle

«According to the surveys, BIM is no longer just a hype—the technology is established and firmly deployed by progressive companies. However, reality shows: while the understanding is widely present, consistent implementation in processes and organizations is often lacking. The technology matrix makes it clear: it is no longer the 'if', but the 'how' of integration that now determines the real benefit.»

3.4.2 Operational Deployment in Practice

The breakdown by the different stakeholder groups in the construction industry reveals that the adoption of technologies is highly role specific. While selected digital tools are already considered industry standards, distinct focal points emerge for physical and data-driven innovations:

- **Platforms & Portals as well as Building Information Modeling (BIM)** have established themselves in daily operations across all disciplines. Penetration is particularly pronounced in production and supply, where both technologies are already firmly deployed by 80% of the companies surveyed. They also form a solid foundation in planning and project development.
- While widespread productive deployment is still pending, the greatest dynamic prevails here: Among technology and construction consultants, **Artificial Intelligence** (almost 58% aggregated) and **Data Analytics** (over 63% aggregated) are massively in the planning or setup phase. In planning and project development, too, around half of the companies are currently actively advancing these data-driven initiatives.
- **Additive Manufacturing (3D Printing)** paints a highly polarized picture. While the technology is barely used operationally in planning and classic construction execution (often over 80% of «Not in use"), it unfolds its potential in production and supply: here, a remarkable 60% of companies report operational deployment.
- Across the entire value chain, approaches such as **Blockchain** and **Smart Materials & Nanotechnologies** currently play no operational role. In construction execution and technology consulting, the "Not in use" values for these innovations remain consistently between almost 90% and 100%.



T1: Platforms & Portals
T2: Decentralized Energy Technologies
T3: Building Information Modelling (BIM)
T4: Virtual & Augmented Reality
T5: Robotics & Drones
T6: Sensors & Actuators (Internet of Things)
T7: Data Analytics & Big Data
T8 Artificial Intelligence & Machine Learning
T9: Navigation & Location Based Services
T10:Additive Manufacturing (3D Printing)
T11:Smart Material & Nanotechnologies
T12:Blockchain (Internet of Value)

Image 14: Operational deployment of key technologies along the different value chain phases. Data basis: Digital Real Estate & Construction Study 2026, pom+Consulting AG. Special analysis for the construction industry (n=69).

3.4.3 Technology Classification in the Maturity Cycle

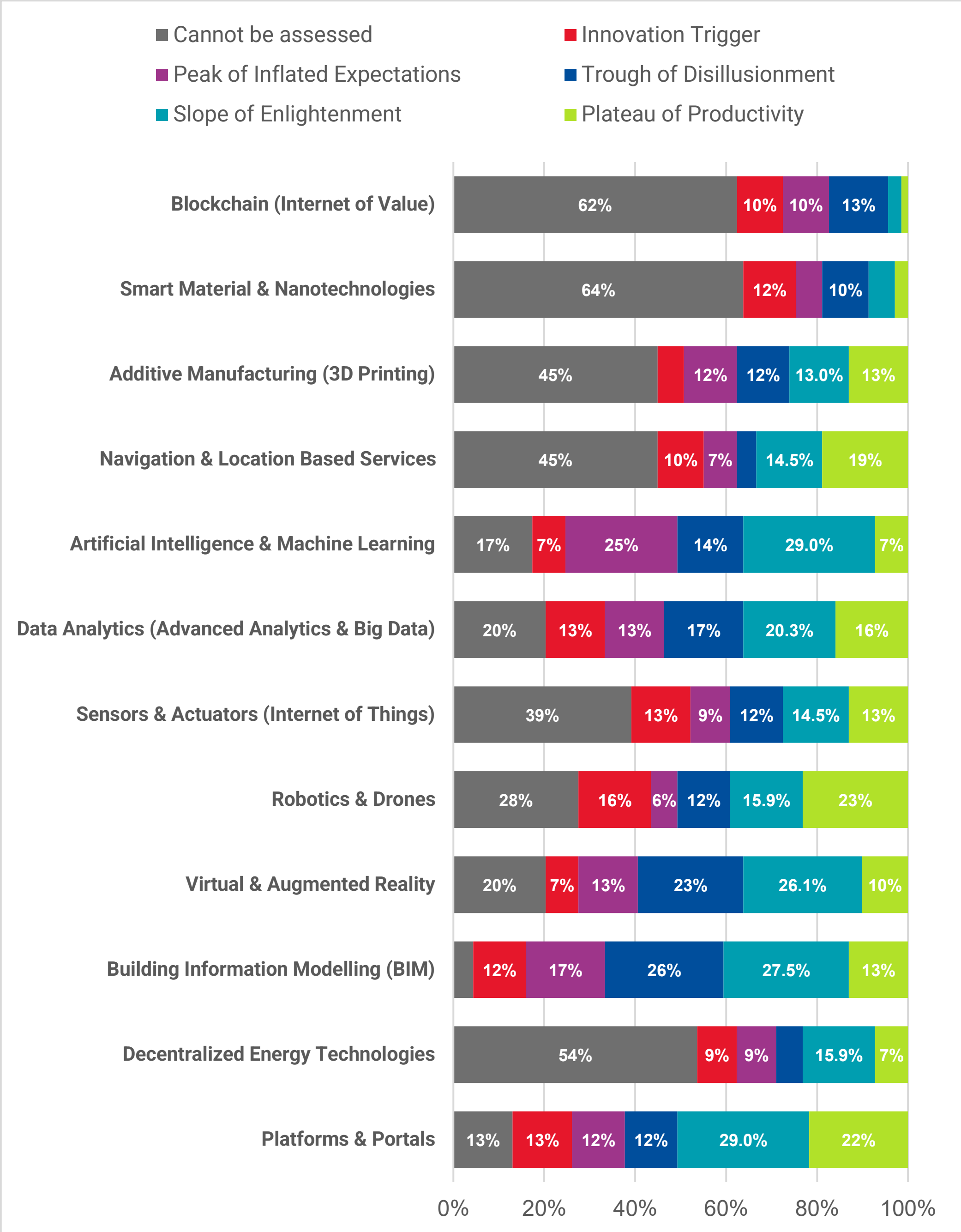


Image 15: Classification of key technologies within the industry-specific maturity cycle. Data basis: Digital Real Estate & Construction Study 2026, pom+Consulting AG. Special analysis for the construction industry (n=69).

The classification of technologies within the maturity cycle (based on the established Hype Cycle) highlights the discrepancy between market expectation and productive reality. Four central development patterns emerge:

- Digital **Platforms & Portals** exhibit the highest maturity level; a good half of the respondents (a combined 51%) locate these in the mature phases (Slope of Enlightenment or Plateau of Productivity).

- **Building Information Modeling (BIM)** is on the "Slope of Enlightenment" for 27%. At the same time, the method is still struggling with the "Trough of Disillusionment" for a relevant share of companies (26%), pointing to ongoing challenges in practical standardization.
- The perception of Artificial Intelligence & Machine Learning is highly polarizing. While almost a quarter (24%) still sees the technology at the "Peak of Inflated Expectations", 29% already locate it on the "Slope of Enlightenment". This signals the active transition from media hype to the development of first operational use cases.
- **Robotics & Drones** show surprisingly high maturity scores; 23% of companies already assign them to the "Plateau of Productivity". In contrast, experimental approaches like **Blockchain** (1% on the plateau) or **Smart Materials** (3% on the plateau) currently lack established market maturity in the construction industry.

Walo Bertschinger AG | Samuel Bernet

«Construction robotics is increasingly evolving from a phase of inflated expectations towards a more realistic application, in which initial solutions already deliver measurable added value on suitable projects (e.g., in earthworks or paving). However, their successful deployment requires high planning quality and consistent digital foundations like BIM, which today often first need to be created. In the long term, robotics can counteract the shortage of skilled workers by supporting and complementing professionals, as well as creating additional incentives for young talent through new, more diverse job profiles.»

4 In-Depth Analysis: Thematic Areas and Workshop Insights

This chapter presents the findings from the theme-specific expert workshops. It highlights practical use cases from partner organizations and analyzes the most important technological developments in the industry.

4.1 Thematic Area A: Artificial Intelligence and Data Analytics

This thematic area covers technologies that are currently on the threshold of broad operational implementation in practice.

4.1.1 Artificial Intelligence in Planning and Project Development

The workshop hosted by the Amberg Group, in collaboration with QAECY, identified data quality as the primary success factor for the implementation of artificial intelligence.

Image 16: Workshop "Artificial Intelligence in Planning and Project Development" at Amberg Group.

Insights from the QAECY/Amberg Workshop: "Context is King" The central mantra of the workshop was: "Context is King." Philipp Dohmen (QAECY) emphasized that the quality of AI results does not primarily depend on the intelligence of the algorithm, but rather on how well the AI understands the context of the data.

- **Context before content:** An AI can generate content, but without the specific project context (e.g., local building codes, geological anomalies), the results remain superficial or flawed.
- **Data preparation as a key competency:** The true added value is generated in the structured preparation of the data foundation. "Smart" algorithms inevitably fail when fed with "dumb" (unstructured) data.

Use Cases: Project Audits, Logistics Planning, and Tender Optimization The experts identified concrete use cases that are already delivering efficiency gains today:

- **Project audits:** Piotr Dawidowicz (Nukleus AG) demonstrated how AI analyzes complex project data and unstructured documents (contracts, protocols) to identify risks in audits faster and make complex interrelations comprehensible.
- **Logistics planning (4D):** Yvette Koerber (Amberg Loglay) demonstrated the use of AI in 4D models to optimize construction site logistics and construction sequences. Here, AI helps to avoid temporal collisions and smooth out material flows.
- **Tendering:** Sven Affeltranger (Scalera) presented how AI analyzes and optimizes tender texts to identify gaps in bills of quantities at an early stage.

Nukleus AG | Piotr Dawidowicz - AI & Insurance & Law

«AI frees us from bureaucracy and turns compliance into a competitive advantage. »

Risks: Bias and Data Quality This potential is offset by significant risks that hinder broad scaling:

- **Bias risk:** There is a danger of distorted results if AI models are trained with unbalanced or homogenized data. This can lead to flawed decision-making during the planning phase.
- **Skill degradation:** A widely discussed risk is the creeping loss of human planning expertise, which occurs when engineers blindly rely on AI proposals without being able to validate them for plausibility.

4.1.2 Artificial Intelligence in Operations and Maintenance

In the operation of critical infrastructures, automated data processing is already standard practice. The workshop at Swissgrid illustrated the transition from pure condition assessment to predictive analysis.

Insights from the Swissgrid Event: Critical Infrastructures For operators of critical infrastructures, AI is not a hype, but an indispensable tool for managing increasing complexity and data volumes. The central finding: AI is the connective tissue between massive data volumes (Big Data) and well-founded decisions.

Image 17: Workshop "Artificial Intelligence in Operations and Maintenance" at Swissgrid.

- **From inspection to prediction:** Drones and camera systems continuously capture massive volumes of image data. Machine learning models take over the pre-filtering process to detect cracks, corrosion, or vegetation in the line area. The analysis of historical data series enables predictive maintenance.
- **Document and process automation:** The recognition and automated extraction of relevant information from invoices, delivery notes, and defect lists accelerates approvals and reduces error rates in daily operations.
- **Human-in-the-loop:** In safety-critical decisions, technology serves exclusively as an assistance system. The final decision remains with the technical staff, as overlooked damage to critical infrastructures is unacceptable.
- **Data pooling:** Because robust learning models require large amounts of categorized training data, companies in industry-wide initiatives (such as a smart image database) exchange anonymized damage images across corporate boundaries. This data cooperation improves the recognition models for all participants.

4.1.3 Data Analytics and Big Data

Data Analytics is evaluated in the study as a technology with very high utility potential (around 71% high or very high utility). However, the workshop with Esri, pom+, and vyzn at ETH Zurich showed that while the technological foundations are often present, successful implementation frequently fails due to organizational hurdles.

- **The digital twin as a decision space:** The added value arises from linking building data, geographical environment data, and real-time sensor data. This combination allows scenarios such as energy demand, urban heat islands, or traffic flows to be simulated prior to the construction phase.
- **Sustainability and life cycle analysis:** By linking material databases with emission factors, ecological key performance indicators can be precisely calculated in early project phases. Sustainability thus transforms from a retrospective evaluation into a proactive management instrument.
- **Data silos and governance:** In practice, planning, construction, and operational data frequently reside in separate systems without seamless interfaces. There is a lack of defined data strategies and specialized professionals such as data architects. Cleansing and structuring data quality is the fundamental prerequisite for successful analytics projects.

4.2 Thematic Area B: Connectivity, Infrastructure, and Cybersecurity

This cluster illuminates the technological backbone of the digital transformation. Without high-performance networks, scalable computing power, and robust security architectures, applications like AI or robotics remain isolated experiments.

4.2.1 5G, Cloud Technologies, and Environmental Monitoring

The workshop with Sunrise, Huawei, and Implenia made it clear that 5G and cloud technologies are no longer visions of the future but operational reality, although they often remain confined to pilot projects.

Insights from the Sunrise Workshop: Real-Time Capability as a Game Changer The central insight of the workshop was: connectivity is not an end in itself. The actual added value is generated by real-time capability, which is decisive for safety and productivity on the construction site.

Image 18: Workshop "5G, Cloud Technologies, and Environmental Monitoring" at Sunrise.

- **Real-time capability and data availability:** The infrastructure enables the instantaneous transmission of large data volumes. The industry is moving from sporadic measurements to continuous data streams.
- **Passive sensors and crane cameras:** Battery-free, extremely cost-effective sensors enable seamless asset and tool tracking on the construction site. Cameras on cranes transmit high-resolution live images directly to central data storage, enabling automated construction progress monitoring.
- **Environmental monitoring:** Sensors at excavation sites continuously compare measured values against defined thresholds. In the event of deviations, an automated alert is triggered. The sensor data is linked to digital building models for legally compliant documentation.

4.2.2 Infrastructure for Artificial Intelligence

The workshop with Equinix and pom+ demonstrated that AI is not purely a software issue but places massive demands on the physical IT infrastructure.

- **Hardware requirements:** AI computing processes require extremely high capacities and generate significant heat loads. This necessitates new cooling concepts within data centers.
- **Hybrid architecture:** While the training of large language and image models takes place in external high-performance data centers, data processing for time-critical applications is increasingly handled locally (edge computing) in the building or on the construction site.
- **Internal assistants and customer communication:** Systems trained exclusively on internal corporate data are establishing themselves as digital knowledge assistants. Simultaneously, chatbots and voice-controlled telephone systems automate the handling of recurring tenant inquiries or damage reports in daily facility management.

4.2.3 Cybersecurity in the Construction Industry

With the increasing connectivity of buildings and construction sites, cybersecurity is evolving into a central business risk. This was the focus of the workshop with Ergon, the SIA, and SwissLife.

Image 19: Workshop "Cybersecurity in the Construction Industry" at Ergon Informatik.

- **Connected buildings as an attack vector:** Outdated operating software in building automation as well as inadequately secured sensors constitute vulnerabilities.

Attackers exploit these components to infiltrate corporate networks. Cyberattacks in the construction industry can have direct physical consequences, such as the failure of critical building technology.

- **Regulatory mandates:** The upcoming European Cyber Resilience Act obliges manufacturers and integrators of connected products to guarantee security updates over the entire life cycle. In the future, companies will have to maintain digital software bills of materials to transparently identify the components installed in buildings.
- **Management responsibility:** Cybersecurity requires anchoring in the corporate culture, comparable to physical occupational safety. Because human error remains a primary target for attacks, continuous awareness measures are essential.

4.3 Thematic Area C: Physical Implementation and Processes

This cluster deals with the transfer of digital data into physical production and construction execution.

4.3.1 Industrial Prefabrication and Logistics

The workshop at R. Nussbaum AG (in cooperation with ERNE AG Holzbau and VAULTED AG) marked a turning point in the discussion: moving away from the theoretical "why" of digitalization towards the practical "how" of industrialization.

Image 20: Workshop "Industrial Prefabrication and Logistics" at R. Nussbaum AG.

R. Nussbaum AG | Patrik Zeiter

«Digitalization in the construction industry is not an end in itself, but the load-bearing foundation for efficient and economical prefabrication, particularly in piping systems, which disproportionately benefit from precisely pre-cut sections.»

- **Industrialization through individualized serial production (mass customization):** Industrial manufacturing aims to produce individualized components under factory conditions. Through algorithm-based planning and robot-assisted production, the efficiency advantages of serial production can be combined with the individuality of construction projects. This leads to measurable material savings.
- **Direct machine control:** The digital twin acts as a direct control interface for production machines. Manufacturing systems read the bills of materials and dimensions flawlessly and without media discontinuity straight from the model data. This requires end-to-end datasets and open interfaces to prevent dependencies on closed systems.
- **Human-centric logistics:** Intelligent logistics planning that limits material bundles to a maximum weight promotes ergonomics. Digital processes ensure that the material is available on schedule and at the correct weight at the specific installation location on the construction site.

4.3.2 Robotics and Automation

The insights from expert interviews provide a realistic assessment of automation on the construction site.

ETH Zürich | Olga Vysotska

«Robotics on the construction site is no longer science fiction and must not be reduced to humanoid robots. The primary goal is not to replace humans; rather, robotics is the key to massive improvements in occupational safety and execution quality in a highly complex environment. We must not wait for the perfect standard but must integrate the hardware into our processes now. »

Current State of Automation on the Construction Site The study results and expert interviews paint a differentiated picture:

- **Growing operational deployment:** The study data confirms that robotics and drones have left the "Trough of Disillusionment" and are productively establishing themselves in large parts of the industry (nearly 50% in use).

- **Use cases:** Drones for exact surveying and inspection, as well as specialized robots for hazardous or monotonous tasks (e.g., drilling robots, mobile sensor platforms for construction documentation), have been successfully established.

- **Hurdles and paradigm shift:** The unstructured environment of a classic construction site remains the greatest challenge for purely autonomous systems. However, the strategic focus is shifting away from humanoid robots towards collaborating, assisting systems (collaborative robots or cobots).

4.3.3 Watchlist: 3D Printing (Additive Manufacturing) and Smart Materials

The expert consensus classifies technologies such as 3D printing and smart materials as strategic innovations on a long-term watchlist.

Classification: Niche vs. Scaling Potential

- **Additive Manufacturing (3D Printing):** Despite high media attention for printed structures, productive deployment in the industry-wide average is currently around 25%—although this figure is almost exclusively driven by Production and Supply (60% deployment). In the classic planning process and construction execution, the technology currently plays hardly any role. It is viewed as a highly specialized niche for complex special components, not as a direct replacement for traditional structural engineering on a broad scale.
- **Smart Materials & Nanotechnologies:** These are still in the "Technology Trigger" phase within the market. The potential for greater sustainability (e.g., self-healing concrete) is theoretically enormous, but it currently plays no role in the investment decisions of companies.

Implenia AG | Karel van Eechoud - Digitalization & Materials Science

«Don't wait for miracle concrete. Digitize your supply chain. It saves money and CO_2 today.»

Since market-ready, scalable use cases for mainstream building construction are currently lacking, these technologies are mostly used in niche applications or isolated pilot projects. In expert discussions, their immediate relevance to the operational core business is viewed as secondary.

5 Expert Analysis & Interpretation

The results of the Trendmonitor 2026 paint the picture of an industry that has left the phase of digital euphoria and arrived in an era of realistic consolidation. While the technological infrastructure is ready in many areas, the data gathered by the "Digital Next Gen" Expert Group reveals profound structural paradoxes that hinder the next major leap in productivity within the Swiss construction industry.

5.1 The Prioritization Paradox: Investment Backlog Instead of Lack of Capital

The juxtaposition of the study data reveals a glaring discrepancy in the financial and strategic orientation of the construction industry:

- **The data basis:** While 38% of respondents identify investments and costs as the absolute main obstacle to their digital transformation, 51% of companies concurrently invest a maximum of 1% of their annual revenue in digital innovation.
- **Strategic allocation:** The expert analysis illustrates that the construction industry does not necessarily lack fundamentally available capital, but rather targeted strategic allocation. A significant portion of budgets is tied up in managing "System Legacy" (classified as a major obstacle by 30%)—that is, maintaining outdated IT structures and fragmented silo solutions.
- **Defensive vs. Offensive Digitalization:** A pronounced "defensive digitalization" can be observed. Budgets flow primarily into maintaining the status quo. There is a lack of "offensive digitalization": targeted investments in new business models and the radical automation of the value chain. Those who continuously invest less than 1% are merely managing the technological lag, rather than actively leading the transformation.

5.2 The True Talent Shortage: A Leadership and Cultural Issue

The study results refute the prevalent, omnipresent narrative of the "War for Talents" for the specific situation of the construction industry:

- A narrow majority of **51%** of respondents see the shortage of skilled workers and personnel fluctuation as no or only a minor obstacle to digital development.
- **Talent Deployment Shortage:** The synthesis with the findings of the Expert Group suggests that the industry suffers less from a pure shortage of professionals, but much more from inefficient utilization of existing resources. Digital talents are recruited, but often encounter rigid, analog-driven process structures in which they cannot unfold their digital expertise.

- The real challenge lies in the cultural shift. It requires a rethink in digital leadership towards more employee empowerment than the targeted empowerment and autonomy of professionals at the grassroots level.

MetaXD AG & BdCH/bSCH | Gianluca Genova

«The fact that over half of the respondents do not identify the shortage of skilled workers as a primary obstacle points to a central leadership problem: The Swiss construction and real estate industry possesses sufficient digital talents, but restricts their effectiveness through rigid, analog structures. In classic top-down hierarchies, innovative approaches find little room, causing the potential of young experts to fizzle out due to a lack of autonomy and psychological safety. Thus, we do not ascertain a quantitative shortage of headcounts, but rather a 'talent deployment shortage.' The solution requires a realignment of digital leadership: the goal must be to establish a bottom-up culture and systematically invest in the enablement of employees, rather than merely managing talents within existing structures.»

5.3 The Pilot Trap and Waiting for Standards

The desire for perfect framework conditions often blocks courageous entrepreneurial decisions:

- Data availability (36%) and a lack of end-to-end standards (34%) are identified as the most massive hurdles alongside costs. At the same time, pure productivity enhancement dominates the objectives (82.8 out of 100 points), while the development of new business models (29.6) is neglected.
- Companies run the risk of getting stuck in the so-called "pilot trap." The lack of finalized industry-wide standards (such as conclusively defined openBIM workflows) is often cited as a justification to postpone one's own strategic investments.
- **Electronic paper instead of rethinking:** Instead of fundamentally restructuring the physical execution on the construction site or in manufacturing, many actors limit themselves to merely mapping existing analog processes slightly more efficiently using digital tools.

5.4 Technology Maturity: Between Hype (AI) and Practice

The hype surrounding data-driven technologies meets harsh physical and structural realities in the construction industry:

- Artificial Intelligence & Machine Learning record very high utility expectations at around 71%, yet are in productive use among merely 20% of companies.

- The qualitative workshop results make it clear that it is not the quality of the algorithms that slows down implementation, but the lack of a data foundation. As long as project and corporate data reside in isolated silos, complex use cases remain an illusion.
- The true value creation lever of the construction industry currently does not lie in generative text applications, but in the seamless linkage of digital data with physical realization—the direct transfer of information from the digital model to the production machine **(End-to-end digital manufacturing).**

pom+Consulting AG | Isabel Gehrer

«The 2026 study results show once again that the construction and real estate industry is in the digital antiquity. A major reason for this is that organizations mature slower than technologies and need time to adjust to changing framework conditions. The transition to digital modernity will therefore not succeed with the next software, but with the systematic build-up of governance, process, and data structures. While AI can support this transition because it makes integration deficits visible faster, it will only be effective where organizations are prepared to consistently remediate their digital foundation.»

5.5 The Reality Check: Stagnation as an Opportunity for Consolidation

The perceived stagnation across the breadth of the market must not be misinterpreted as a strategic failure:

- 53% of respondents attest a stagnation in digital development within their market environment.
- After years of unreflectively trying out diverse software solutions, a sober realism is setting in. The current phase is rather **a necessary phase of consolidation**. Companies are presently focusing on cleansing historically grown data structures, replacing silo solutions, and integrating their IT landscapes. This well-founded "homework" forms the absolutely necessary foundation for the impending leap into an industrialized construction economy.

6 Strategic Recommendations for Action

The analysis of the study data and the expert workshops clearly shows: The Swiss construction industry does not suffer from a lack of available technologies, but from structural and strategic bottlenecks. To break through the observed stagnation, decision-makers must shift their focus from the mere introduction of technology to measurable economic added value and legally robust framework conditions.

6.1 Role-Specific Checklists for the Transformation

6.1.1 For CEOs & Executive Management

Strategy, Investment, and Legal Certainty

The study data confirms that 51% of companies invest less than 1% of their revenue in digital innovation. Executive management must flip this strategic lever and create clear framework conditions for change:

- **Scale investment budgets:** Move away from IT budgets that merely manage the status quo (outdated IT structures / legacy systems). To be operationally effective and lead the transformation, a dedicated innovation budget of 3 to 5% of annual revenue is recommended.
- **Establish measurability (KPIs):** Digital initiatives must be economically viable. Link use cases directly to hard key performance indicators (KPIs) such as increasing project margins, reducing implementation times, or measurably minimizing construction risks.
- **Prioritize legal certainty and governance:** Technological innovation brings new legal challenges. Proactively clarify liability issues in decisions supported by Artificial Intelligence. In addition, cybersecurity (e.g., preparation for the Cyber Resilience Act) and data compliance must be anchored at the executive level as existential business risks.

6.1.2 For HR & Organizational Development

The Value-Creating Deployment of Digital Talents

The industry lacks professionals less than it lack their efficient deployment. Digital talents require framework conditions in which they can unfold real impact:

- **Create resources and scope for action:** Explicitly allocate time for transformation tasks. If digital professionals are 100% tied up in daily operational business, their innovation potential fizzles out.
- **Adjust incentivization:** Link the performance and target agreements of digital talents directly to measurable project success (e.g., adherence to project budgets, schedules, and quality specifications).
- **Integrate new skill profiles:** Look beyond classic construction managers and systematically recruit Data Architects, Prompt Engineers, and Integration Specialists.

6.1.3 For Project Managers & Planners

Data Hygiene and Standards

- **Data hygiene as the foundation:** Invest time in structuring your data (contracts, standards, plans). Only a clean data foundation enables the reliable use of Artificial Intelligence for automated audits.
- **Think end-to-end digital manufacturing:** Do not view the 3D model merely as a planning or visualization tool. The true Return on Investment (ROI) is generated when the model flows flawlessly as a bill of materials into industrialized prefabrication.

6.2 Strategic Action Areas (Where the Industry Needs to Catch Up)

The study results uncover strategic blind spots that must be addressed immediately to secure competitive advantages:

6.2.1 Action Area 1: From Internal Process to Customer Experience

- **The Problem:** 50% of companies have no activities regarding digital customer portals. Digitalization is used almost exclusively to increase internal productivity.
- **The Solution:** Those who digitize the customer experience (e.g., through seamless data handover to facility management or data-driven supplementary services) escape pure price competition. The development of new business models must become a strategic priority.

6.2.2 Action Area 2: Industrialization of Physical Implementation

- **The Problem:** Construction execution suffers from industry-wide productivity stagnation.
- **The Solution:** The future lies in industrialization through individualized serial production (mass customization). Prefabrication under factory conditions, controlled by seamless digital data chains, drastically reduces material waste, improves quality, and thus has a direct positive impact on project margins and the risk profile.

6.2.3 Action Area 3: Collaboration and Secure Data Ecosystems

- **The Problem:** 45% of companies see a lack of standards and interoperability as the biggest obstacle; silo thinking characterizes the industry.
- **The Solution:** The digital transformation cannot be mastered in isolation. It requires shared platforms and data pools. To enable this, companies must establish new contract models for data pools and ecosystems that clearly and

fairly regulate data ownership, usage rights, and IP protection (Intellectual Property).

6.3 The Digital Next Gen Maturity Model (Investment Focus)

Based on the utility assessments, the Expert Group recommends the following prioritization for IT and innovation budgets to maximize ROI:

1. **Secure the foundation (The "Must-Haves"):** Invest in common data environments (CDE) for collaboration as well as in robust cybersecurity architectures. Without this foundation, further innovations are exposed to an unacceptable risk.
2. **Scale value creation (The "Hard Work"):** Transition from pure 3D modeling to comprehensive information management (BIM) and utilize IoT sensor technology for automated construction and operational control.
3. **Prepare for the future (The "Growth Potential"):** Establish data management as a preliminary stage for internal corporate applications of Artificial Intelligence to realize efficiency gains in knowledge management.
4. **Monitor strategically (The "Watchlist"):** For 3D printing, smart materials, and blockchain, there is currently no proven business case in mainstream operations. Market observation and selective collaborations with research institutions are sufficient here.

6.4 Outlook: Legal Certainty and the Future Role of the Expert Group

Many essential questions of digital scaling—in particular the detailed legal frameworks, liability issues in algorithmic planning decisions, or the design of multi-party contract models in data ecosystems—are highly complex and cannot be conclusively examined within the scope of this first Trendmonitor. However, for decision-makers, this legal certainty is indispensable.

The "Digital Next Gen" Expert Group will address these interconnected topics intensively in future initiatives. Our clear goal is to develop concrete measures and standardized answers to the "5 Ws" of transformation (What, Who, When, Why, How) in close cooperation with the association Bauen digital Schweiz / buildingSMART Switzerland (BdCH / bSCH). BdCH / bSCH will play a central role here as a neutral industry moderator and pacesetter for new legal and procedural standards.

6.5 Conclusion: The Shapers of Tomorrow

The «Digital Next Gen Trendmonitor 2026» is a wake-up call. The integration of Artificial Intelligence, robotics, and digital twins requires a radical rethink regarding processes, legal safeguarding, and above all, leadership culture. The tools are on the table. The capital is available in the market—given the correct prioritization of 3 to 5% of revenue.

Now it comes down to the courageous decision-makers who are willing to tear down data silos, break new legal ground, and hand over the steering wheel to digital talents through genuine employee empowerment. Only those who build the bridge between technological excellence, economic KPIs, and physical construction will successfully, sustainably, and profitably shape the living space of the future.

Bauen digital Schweiz / buildingSMART Switzerland

Expert Group Digital Next Gen

7 Appendix

7.1 Directory of Workshop Partners and Hosts

The core of the «Digital Next Gen Trendmonitor» consists of qualitative insights from the theme-specific workshops. We would like to thank our partners for their hospitality and the transparent insight into their "workshops" and data rooms.

Table 1: Directory of Workshop Partners and Hosts

Thematic Cluster	Host & Partner Organizations	Focus Topics
AI in Planning & Projects	Amberg Group (Host), QAECY, Nukleus, Scalera	Context-based AI, Logistics Planning (4D), Project Audits, Tendering
AI in Operations & Maintenance	Swissgrid (Host), Axpo, ioLabs	Critical Infrastructures, Predictive Maintenance, Smart Image Database
AI Infrastructure	Equinix (Host), pom+	Data Centers, Hardware Requirements, Data Strategy
Data Analytics & Big Data	ETH Zurich (Host: Future Cities Lab Global), Esri Suisse, vyzn	Digital Twins, Urban Analytics, GIS-BIM Integration
Connectivity (5G/Cloud)	Sunrise (Host), Huawei, Implenia	Real-Time Data, Passive IoT, GeoMonitoring, Construction Site Connectivity
Physical Innovation	R. Nussbaum AG (Host), ERNE AG Holzbau, VAULTED AG	Industrial Prefabrication, EcoLogistics, Robotics
Cybersecurity	Ergon Informatik AG, SIA, SwissLife	Cyber Resilience Act, IoT Security, Awareness Gaming
Kick-off & Networking	MetaXD, Impact Hub Zurich	Roadmap Development, Trend Brainstorming

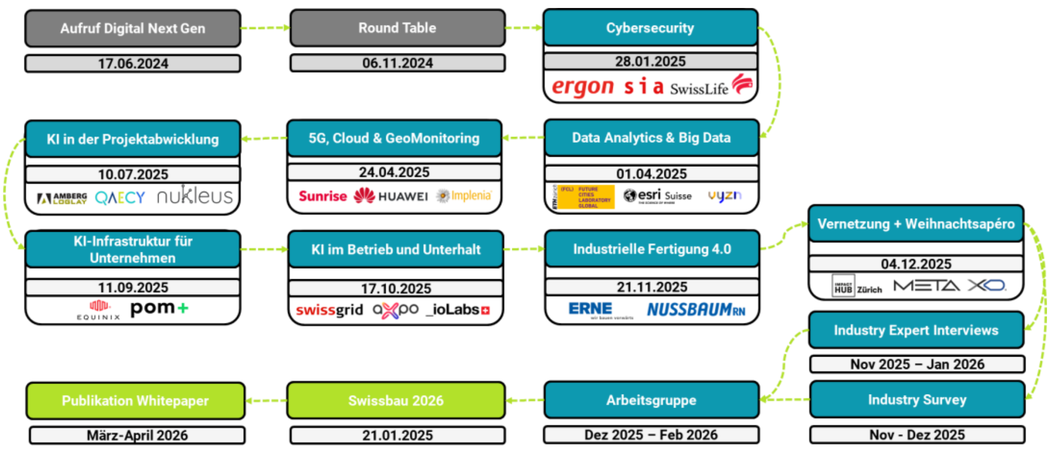


Image 21: Review 2025: A Year Full of Insights

7.2 Acknowledgments and Sponsors

This Trendmonitor is the result of intensive collaboration across association and corporate boundaries. Our special thanks go to the over 190 professionals and experts who participated in the survey and shared their knowledge in the workshops. Without their open exchange and willingness to share "Lessons Learned," this reality check for the industry would not have been possible.

The realization of this whitepaper was made possible significantly by the generous support of our sponsors. We thank the following companies for their commitment to the digital future of the Swiss construction and real estate industry:

Sponsors:

- Interessengemeinschaft Datenverbund info@igh.ch
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- R. Nussbaum AG info@nussbaum.ch
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- MetaXD AG community@metaxd.ch
- Durable Planung und Beratung GmbH info@durable.ch

7.3 References

The analyses in this whitepaper are based on the following primary and secondary sources:

- **Digital Real Estate & Construction Study 2026:** Quantitative survey by pom+Consulting AG (n=~200), conducted Nov 2024 – Jan 2025.
- **Workshop Protocols & Whitepapers of the Expert Group Digital Next Gen (2025):**
  - AI in Planning and Project Development (Amberg/QAECY)
  - 5G, Cloud & GeoMonitoring (Sunrise/Huawei)
  - Industrial Prefabrication (Nussbaum/ERNE)
  - Data Analytics & Big Data (ETH/Esri)
  - Cybersecurity in the Construction Industry (Ergon/SIA)
- **Expert Interviews (2025):** Qualitative in-depth interviews with experts from research (ETH Zurich) and practice (e.g., Swissgrid, Implenia).
- **LinkedIn Economic Graph:** Data basis for the analysis of global and local talent flows in the area of "Digital Skills."
- **Gartner Hype Cycle:** Methodological framework for the classification of technologies (adapted for the Swiss construction industry).

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Contributing Partners & Workshop Hosts This whitepaper is based on the findings from workshops and interviews with the following partner organizations:

- **AI in Planning:** Amberg Group, QAECY, Nukleus AG, Scalera
- **Infrastructure & Operations:** Swissgrid AG, Axpo Group, ioLabs AG
- **Data Analytics & Big Data:** ETH Zurich (Future Cities Lab Global), Esri Suisse, vyzn
- **Connectivity (5G/Cloud):** Sunrise, Huawei, Implenia
- **Industrial Prefabrication:** R. Nussbaum AG, ERNE AG Holzbau, VAULTED AG
- **Cybersecurity:** Ergon Informatik AG, SIA, SwissLife
- **AI Infrastructure:** Equinix

Coordination & Communication Branch Office Bauen digital Schweiz / buildingSMART Switzerland

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A special thanks goes to the over 190 professionals and experts who contributed their time and knowledge in the context of the «Industry Survey» and the theme-specific workshops. Without their open exchange and willingness to share "Lessons Learned," this reality check for the industry would not have been possible.

Together, we can be proud of what we have achieved and—despite all challenges—look forward to the digital future with confidence!

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