

GLOBAL AEC MARKET

Market Analysis (2019-2034)



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In order to stay updated with technology and work process of the industry, MRFR often plans & conducts meet with the industry experts and industrial visits for its research analyst members.

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 - ii. India

- iii. Japan
 - iv. South Korea
 - v. Malaysia
 - vi. Thailand
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 - viii. Rest of APAC
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- NOTE-
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 - In chapter 11, each company will be profiled based on the market overview, financials, product portfolio, business strategies, and recent development parameters
 - Please note: the company’s financial details cannot be provided if the information is unavailable in the public domain or from reliable sources.
 - Sections marked with * will be provided on a best-effort basis.

EXECUTIVE SUMMARY AND KEY HIGHLIGHTS

Section Highlights

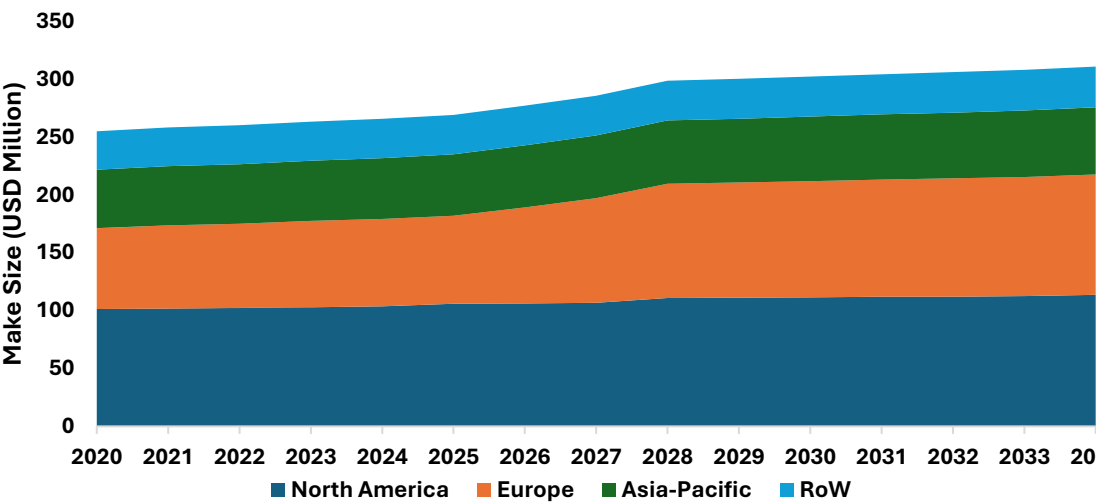
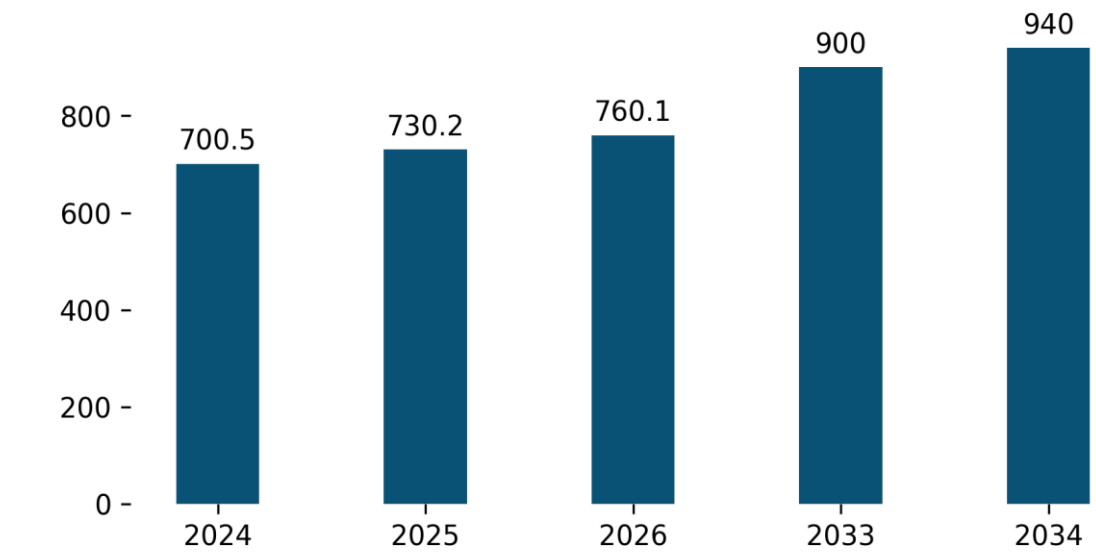
- Executive Summary
- Report Prologue and Key Highlights



EXECUTIVE SUMMARY

- The Global AEC Market Size was valued at 700 USD Billion in 2024. The AEC Market industry is projected to grow from 730 USD Billion in 2025 to 940 USD Billion by 2034 exhibiting a compound annual growth rate (CAGR) of 2.98% during the forecast period (2019 - 2034).
- The Global AEC Market is witnessing significant shifts driven by increasing sustainability initiatives, adoption of advanced building technologies, and growing demand for smart infrastructure. Factors such as rising urbanization, regulatory changes promoting energy efficiency, and economic recovery post-pandemic are further influencing market dynamics. Additionally, digital transformation and automation are reshaping project delivery and collaboration among stakeholders.
- The global construction industry is projected to reach \$15 trillion by 2030, driven by increased urbanization and infrastructure development, as stated by the Global Construction Perspectives. Additionally, the Bureau of Labor Statistics has indicated that employment in the architecture and engineering sector is expected to grow by 3% from 2021 to 2031, reflecting a steady demand for construction services. Furthermore, investments in renewable energy construction projects surged by 40% in 2021 compared to 2020, showcasing a shift towards sustainable building practices which significantly contributes to market expansion.

GLOBAL AEC MARKET MARKET SIZE, 2024-2034 (USD BILLION)

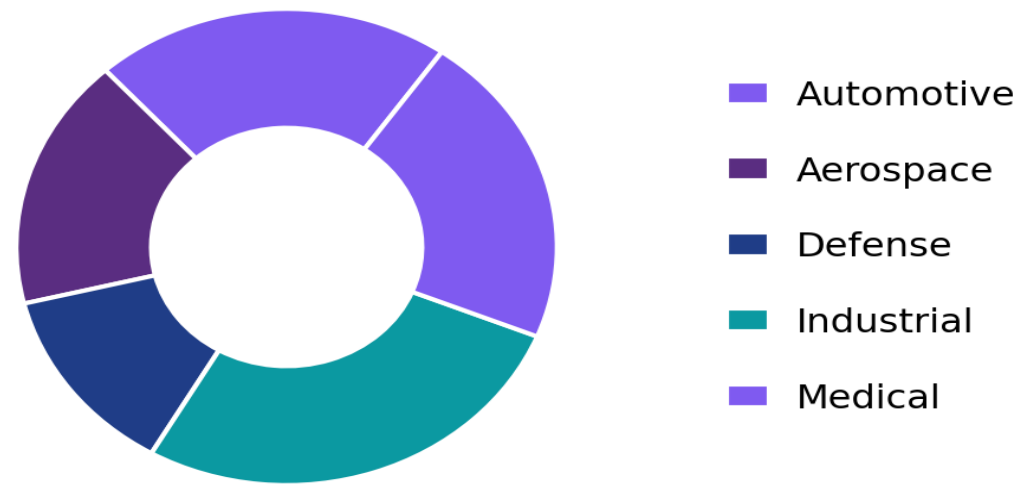


Key Players in AEC Market

- MWH Global
- Bechtel
- Fluor
- KBR
- Tetra Tech
- Arcadis

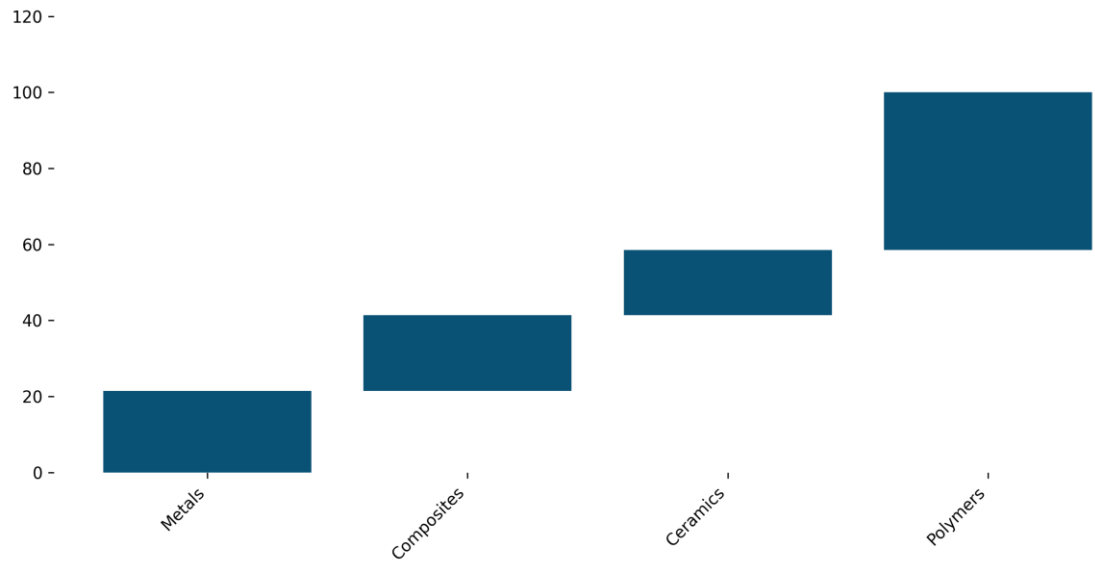
EXECUTIVE SUMMARY CONTINUED

GLOBAL AEC MARKET SHARE, BY APPLICATION, 2024 (%)



The global AEC market is currently witnessing transformative changes driven by advancements in technology and evolving customer needs. A significant catalyst for this evolution is the increasing demand across various key industries such as automotive, aerospace, and defense, where innovation is crucial for maintaining competitive edge. In the automotive domain, companies are focusing on integrating advanced manufacturing processes to enhance efficiency and reduce costs, thereby positioning themselves as market leaders. Similarly, the aerospace sector is employing cutting-edge design software and simulation tools that facilitate the development of safer and more efficient aircraft. The defense industry is not far behind, investing heavily in technological advancements that ensure superior product offerings and operational readiness. Additionally, the industrial sector is becoming more interconnected, leveraging automation and data analytics to optimize processes. This dynamic interplay of advancements and consumer expectations promises continuous evolution and increased value across all applications within the AEC market landscape.

GLOBAL AEC MARKET SHARE, BY MATERIAL, 2024 (%)



The global AEC market is currently undergoing significant transformations driven by advancements in materials technology, where an impressive array of resources is paving the way for novel construction methodologies. Metals continue to be at the forefront, providing strength and durability, while innovative composites are emerging as game-changers, enhancing efficiency and reducing overall weight. Additionally, the integration of advanced ceramics is captivating attention due to their superior thermal properties, allowing for more sustainable building practices. Meanwhile, polymers are gaining traction for their versatility and cost-effectiveness, fueling competitiveness among manufacturers vying to establish leadership in this dynamic landscape. As industry players prioritize sustainability and efficiency, collaboration and strategic partnerships are becoming crucial in refining material usage and unlocking new potentials for construction and engineering solutions, marking a pivotal evolution in the AEC market narrative. Ultimately, investment in research and development will likely define the trajectory of success in this vibrant sector.

MARKET INTRODUCTION & MARKET DYNAMICS

Section Highlights

- Definition & Scope
- Drivers
- Restraints
- Opportunities
- Threats



MARKET INTRODUCTION

2.1 DEFINITION

The AEC (Architecture, Engineering, and Construction) market in the ICT (Information and Communication Technology) sector encompasses technologies, software, and services that support the design, engineering, and construction of infrastructure and buildings. This market includes tools such as Building Information Modeling (BIM), project management software, and cloud-based collaboration platforms. These solutions improve efficiency, enhance collaboration among stakeholders, and facilitate better project outcomes by enabling real-time communication and data sharing. In the real world, professionals in the AEC industry leverage these ICT advancements to streamline workflows, reduce costs, and ensure timely project delivery, ultimately contributing to the creation of more sustainable and resilient built environments.

2.2 SCOPE OF THE STUDY









































This market analysis report on the AEC (Architecture, Engineering, and Construction) sector within the ICT (Information and Communication Technology) landscape explores current trends, key players, market dynamics, competitive analysis, and growth opportunities. It offers insights into technological advancements, digital transformation strategies, and the overall impact of ICT on enhancing project efficiency and collaboration in the AEC industry. Utilizing this information helps stakeholders make informed decisions, optimize resources, and drive innovation in their operations.

2.3 RESEARCH OBJECTIVE


- Analyze market trends and growth projections from 2019 to 2034.
- Evaluate the impact of ICT advancements on traditional AEC methodologies.
- Identify and profile the key market players throughout the study period.
- Assess the competitive landscape and market share distribution.
- Investigate consumer behavior and demand trends within the AEC sector.
- Examine regulatory and environmental factors influencing market dynamics.
- Explore potential challenges and opportunities for stakeholders in the AEC market.

MARKET DYNAMICS - IMPACT ASSESSMENT


FIGURE 6 GLOBAL AEC MARKET: MARKET GROWTH FACTOR ANALYSIS (2019-2034)

Market Factors	Impact Type	Impact Analysis		
	Base (2024)	2019-2023	2024-2025	2026-2033
MACRO FACTORS				
Factor 1				
Factor 2				
Factor 3				
Factor 4				
Factor 5				
Factor 6				
MICRO FACTORS				
Factor 1				
Factor 2				
Factor 3				
Factor 4				


Index



Growth Inhibiting Factor



Growth Promoting Factor



Growth Steading Factor

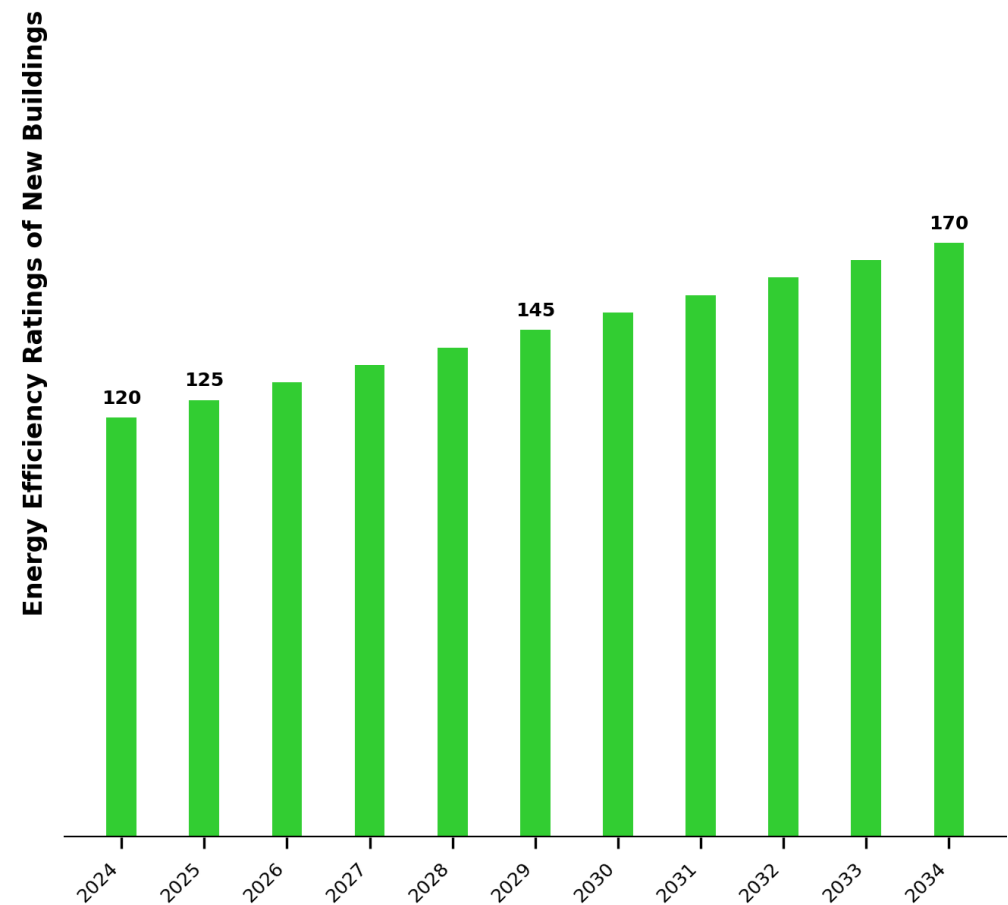
Note:

➤ The Impact indicated the measure of influence on market growth

➤ Each Factor is graded based on historic impact and estimated influence on the market.

Rising demand for sustainable and energy-efficient buildings

FIGURE 7 Energy Efficiency Ratings of New Buildings



- The rising demand for sustainable and energy-efficient buildings significantly influences the Global AEC Market, as stakeholders increasingly prioritize environmental impact. This shift is fueled by growing awareness of climate change and the need for sustainable development practices. Developers, architects, and construction firms are adapting their strategies to incorporate green building practices, which drives innovation in technology and infrastructure within the ICT domain.
- According to the U.S. Green Building Council, buildings that are designed for sustainability can lead to energy savings of up to 30% compared to conventional constructions. Furthermore, the International Energy Agency (IEA) reported that energy efficiency measures in buildings could contribute significantly to reducing greenhouse gas emissions. These statistics highlight the urgency and necessity of integrating sustainability in the AEC industry, further propelling demand.
- The rise in sustainability-focused regulations and standards also plays a critical role in driving the demand for energy-efficient buildings. Governments across the globe are implementing stricter building codes that encourage energy conservation and promote the use of renewable resources. Such regulations make it imperative for market participants to align their practices with sustainability goals, stimulating investment in better technologies and processes.
- In the future, the demand for sustainable and energy-efficient buildings is expected to increase as consumers and businesses become more environmentally conscious. According to a report by GlobeScan, 92% of consumers believe that companies should take action to address climate change. This mindset will likely push the construction sector further towards adopting advanced digital solutions that support sustainable practices, enhancing efficiency and reducing waste.
- Moreover, advancements in technology, such as Building Information Modeling (BIM) and smart building technologies, facilitate the design and construction of energy-efficient structures. As these tools become more widely adopted in the AEC sector, the industry's capability to deliver sustainable buildings effectively will grow, bolstering market growth. This technological adoption ties directly into the broader ICT theme of digital transformation enhancing overall operational efficiency.

MARKET SEGMENTATION

Section Highlights

- End User
- Region



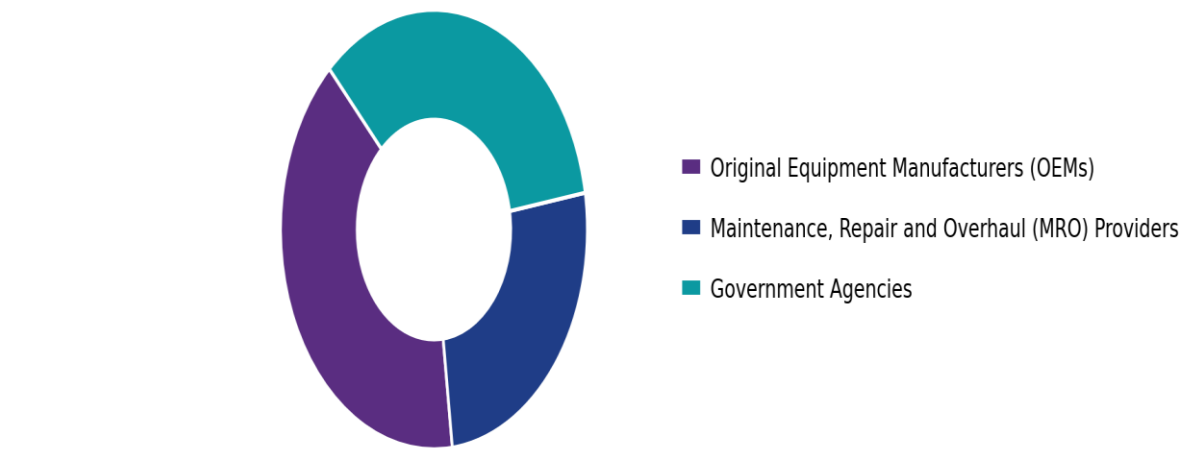
GLOBAL AEC MARKET BY END USER

TABLE 5 GLOBAL AEC MARKET, BY END USER, 2019-2034 (USD BILLION)

END USER	2018-h	2019-h	2022-h	2024-b	2029-p	2033-p	2034-p	CAGR (2024-2034)
Original Equipment Manufacturers (OEMs)	xx	xx	xx	xx	xx	xx	xx	xx%
Maintenance, Repair and Overhaul (MRO) Providers	xx	xx	xx	xx	xx	xx	xx	xx%
Government Agencies	xx	xx	xx	xx	xx	xx	xx	xx%
Total	xx	xx	xx	xx	xx	xx	xx	xx%

Source: MRFR Analysis

FIGURE 16 GLOBAL AEC MARKET, BY END USER, 2024 (%)

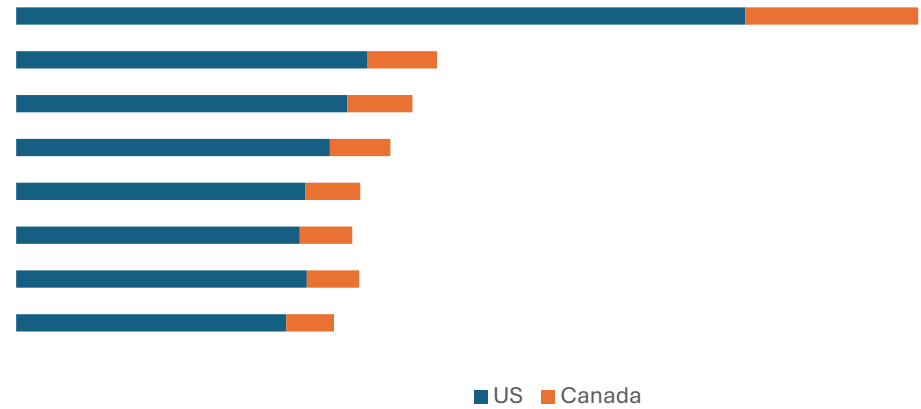


The Global AEC market is observing significant growth as diverse end users increasingly recognize the vital role of advanced technologies, particularly in the ICT domain. Original Equipment Manufacturers play a crucial role in driving innovation as they continuously develop state-of-the-art solutions tailored for construction and engineering needs. The competitive strategies these entities employ focus on enhancing operational efficiency and productivity, which, in turn, appeals to various stakeholders in the sector. Maintenance, Repair, and Overhaul providers have also emerged as key players, emphasizing the importance of sustained system performance in an ever-evolving landscape. Their efforts to incorporate smart technologies represent a major breakthrough in ensuring the longevity and reliability of assets within construction projects.

Moreover, government agencies are instrumental in shaping the trajectory of the AEC market through policy formulation and regulatory frameworks. Their commitment to adopting advanced ICT solutions underlines the necessity for modernization in public infrastructure and, thus, bolsters demand in this domain. Innovative partnerships between these agencies and private sector companies further fuel the ecosystem's growth, as collaborative models pave the way for transformative projects. As different end users adapt to technological advancements and evolving market dynamics, the influence of each stakeholder fosters a competitive yet synergistic environment, setting the stage for a robust AEC market that addresses contemporary challenges effectively.

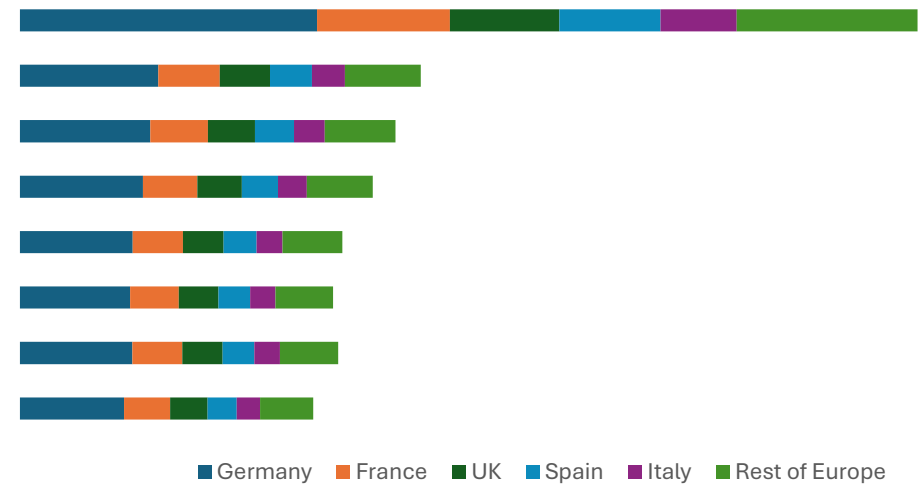
GLOBAL AEC MARKET, BY REGION

FIGURE 14 NORTH AMERICA AEC MARKET, 2019-2034 (USD BILLION)



The AEC Market within North America is characterized by advanced technological integration and a strong emphasis on innovation in the ICT domain. Countries in this market focus on adopting cutting-edge solutions to enhance construction processes, improve collaboration, and streamline project management. Market leaders invest heavily in research and development, fostering a competitive environment that drives continuous improvement and efficiency. Collaboration between private and public sectors plays a substantial role in shaping market dynamics, with a focus on sustainable practices and smart building technologies. As firms navigate evolving challenges, they incorporate new methodologies and digital tools to enhance their service offerings and adapt to market demands, ensuring resilience and growth in a rapidly changing landscape.

FIGURE 14 EUROPE AEC MARKET, 2019-2034 (USD BILLION)



In Europe, the AEC Market demonstrates a robust framework for innovation in the ICT sector, paving the way for smarter and more efficient construction practices. Key players within this market prioritize sustainability, leveraging technology to minimize environmental impacts and optimize resource usage. The competitive strategies of firms often revolve around partnerships and collaborations, which enhance knowledge sharing and technical expertise. Countries in this market are increasingly exploring digitalization through Building Information Modeling (BIM) and other advanced ICT solutions to improve project delivery and lifecycle management. This focus on modernization, combined with strategic investments and a commitment to advancing industry standards, positions the European AEC Market as a leader in embracing new technologies and reshaping the future of construction and engineering.

GLOBAL AEC MARKET, BY REGION

Europe

The Europe region is a vital player in the Architecture, Engineering, and Construction (AEC) market, primarily within the ICT domain. This market features key players, including industry leaders from Germany, the UK, France, and Italy, who drive innovation and set competitive standards through strategic alliances and advanced technologies. These countries are at the forefront of integrating cutting-edge digital solutions that streamline processes, enhance collaboration, and improve project outcomes. The AEC landscape in Europe benefits from a robust infrastructure and skilled workforce, enabling it to adopt transformative technologies that meet growing demands for efficiency and sustainability.

The competitive strategies employed by companies in Europe’s AEC sector revolve around addressing urgent industry challenges, such as increasing project complexity, regulatory compliance, and environmental sustainability. This market focuses on providing solutions that optimize workflow, reduce costs, and enhance the quality of built assets. Furthermore, nations like Spain and Russia contribute significantly by fostering regional innovation hubs, thereby promoting technological advancements in Building Information Modeling (BIM), construction management software, and smart building technologies. In this dynamic market environment, stakeholders continuously seek collaborative approaches to harness the latest technological advancements, ensuring that the AEC industry in Europe remains resilient and responsive to future challenges.

Overall, the AEC market in Europe stands as a testament to the region's commitment to innovation and excellence, drawing on diverse expertise from established nations and emerging markets. The intersection of technology and construction is reshaping the sector, providing a platform for sustainable development and meeting the needs of a rapidly changing world. The continued emphasis on smart infrastructure and digital transformation ensures that the European AEC sector remains highly competitive while addressing critical challenges faced by modern society.

FIGURE 21 EUROPE: AEC MARKET SHARE, BY MATERIAL, 2024 (% REVENUE SHARE)

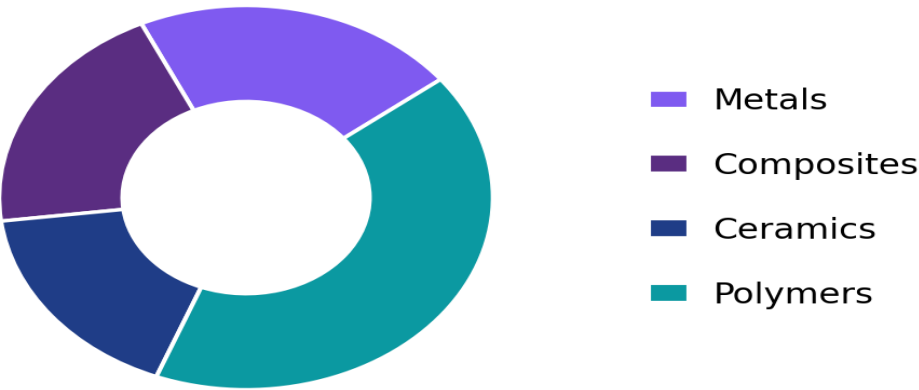
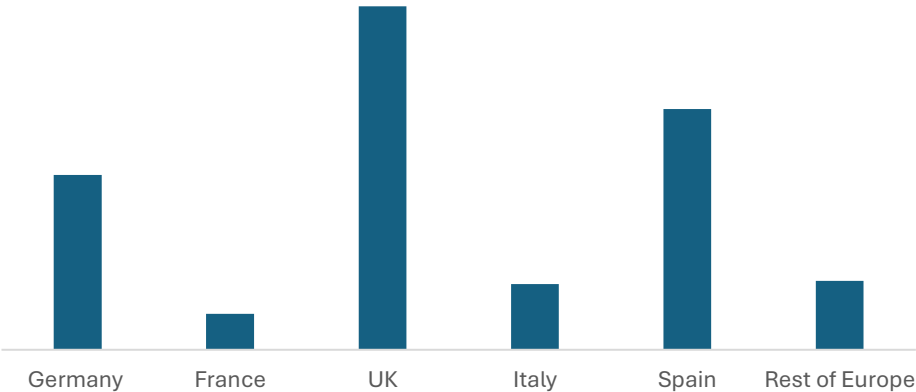


FIGURE 21 EUROPE: AEC MARKET SHARE, BY COUNTRY, 2024 (% REVENUE SHARE)



GLOBAL AEC MARKET, BY REGION

FIGURE 14 EUROPE AEC MARKET, BY MATERIAL, 2019-2034 (USD BILLION)

EUROPE	2018-h	2019-h	2022-h	2024-b	2029-p	2033-p	2034-p	CAGR (2024-2034)
Metals	xx	xx	xx	xx	xx	xx	xx	xx%
Composites	xx	xx	xx	xx	xx	xx	xx	xx%
Ceramics	xx	xx	xx	xx	xx	xx	xx	xx%
Polymers	xx	xx	xx	xx	xx	xx	xx	xx%
Total	xx	xx	xx	xx	xx	xx	xx	xx%

FIGURE 14 EUROPE AEC MARKET, BY COUNTRY, 2019-2034 (USD BILLION)

COUNTRY	2018-h	2019-h	2022-h	2024-b	2029-p	2033-p	2034-p	CAGR (2024-2034)
Germany	xx	xx	xx	xx	xx	xx	xx	xx%
UK	xx	xx	xx	xx	xx	xx	xx	xx%
France	xx	xx	xx	xx	xx	xx	xx	xx%
Russia	xx	xx	xx	xx	xx	xx	xx	xx%
Italy	xx	xx	xx	xx	xx	xx	xx	xx%
Spain	xx	xx	xx	xx	xx	xx	xx	xx%
Rest of Europe	xx	xx	xx	xx	xx	xx	xx	xx%
Total	xx	xx	xx	xx	xx	xx	xx	xx%

COMPETITIVE ANALYSIS

Section Highlights

- Analysis of Competitive Landscape
- Market Share Analysis and Growth Potential
- Competitive Benchmarking
- Financial Summary of Public Players
- Summary of Developments in Market



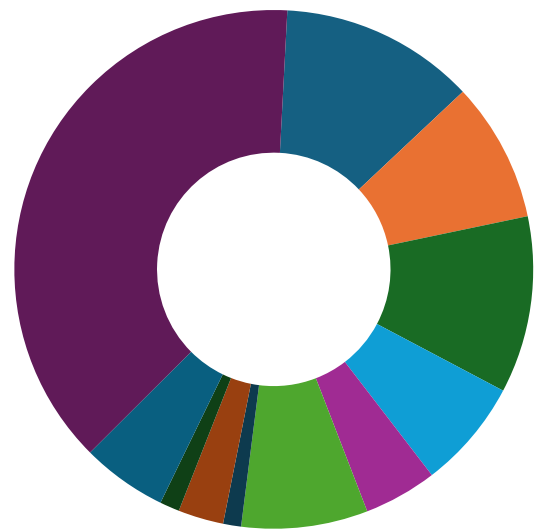
10 COMPETITIVE LANDSCAPE

10.1 INTRODUCTION

The competitive landscape of the AEC market within the ICT domain is characterized by vigorous engagements among market leaders and innovative firms striving to enhance their service offerings. Prominent players in this space are recognized for their strategic initiatives and expertise, shaping the future of architecture, engineering, and construction. These organizations emphasize the integration of advanced technologies like Building Information Modeling (BIM), cloud computing, and artificial intelligence into their operations, fostering more efficient project management and delivery. The focus on sustainability and smarter building solutions has driven these companies to adopt cutting-edge methodologies that enhance client engagement and optimize resource usage.

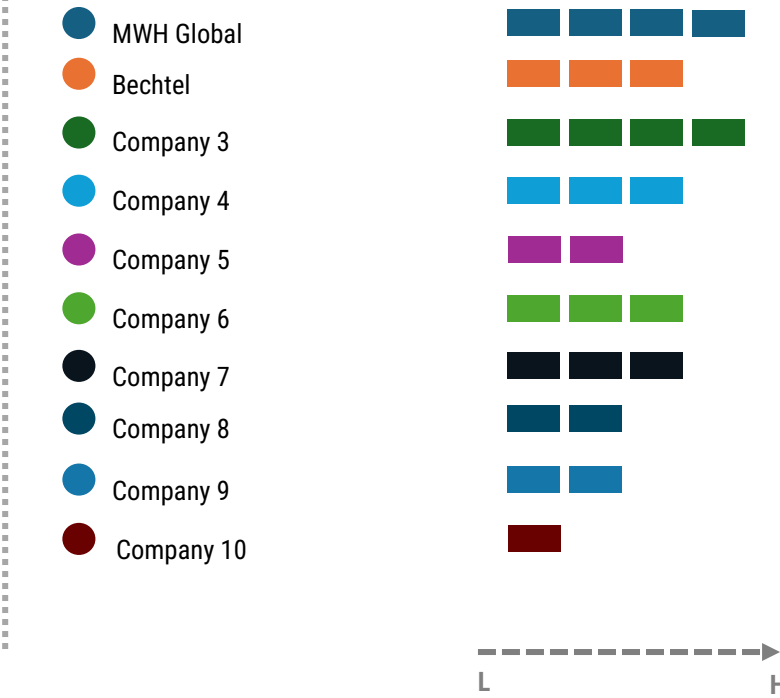
In addition to major players leading the sector, a myriad of niche firms contribute to the competitive dynamics through specialized services and emerging technologies. Collaborations and partnerships among these industry participants often lead to the development of innovative solutions that meet the evolving demands of clients worldwide. A continuous emphasis on improving operational efficiency and addressing challenges characterized by urbanization and environmental concerns indicates a robust and dynamic competitive landscape. This ongoing evolution is poised to reshape the AEC market, with adaptability and technological prowess becoming essential for long-term success.

Market Share (%), Revenue in 2024-2025



Market Share (% Revenue) | USD Billion

Benchmarking Competitor Growth Potential (2025-2034)



KEY DEVELOPMENTS AND GROWTH STRATEGIES

KEY DEVELOPMENTS AND GROWTH STRATEGIES: GLOBAL AEC MARKET

PRODUCT LAUNCH

Date	Company Name	Development
June, 2022	Autodesk	Autodesk announced the acquisition of Innovyze, enhancing water infrastructure design capabilities in AEC.
October, 2021	Bentley Systems	Bentley Systems entered into a partnership with Siemens to promote digital engineering solutions for smart infrastructure.

PRODUCT APPROVAL

Date	Company Name	Development
November 2023		

PARTNERSHIP

Date	Company Name	Development
March 2024		

COMPETITIVE LANDSCAPE

10.6 LEADING PLAYERS IN TERMS OF THE NUMBER OF DEVELOPMENTS IN THE GLOBAL AEC MARKET

TABLE 183 LEADING PLAYERS IN TERMS OF THE NUMBER OF DEVELOPMENTS IN THE GLOBAL AEC MARKET

Company Name	Capacity Expansion	Acquisition	New Product Launch	Recognition	Agreement	Merger	Joint Venture
MWH Global							
Bechtel							
Fluor							
KBR							
Company 4							
Company 5							
Company 6							
Total							

COMPANY PROFILES



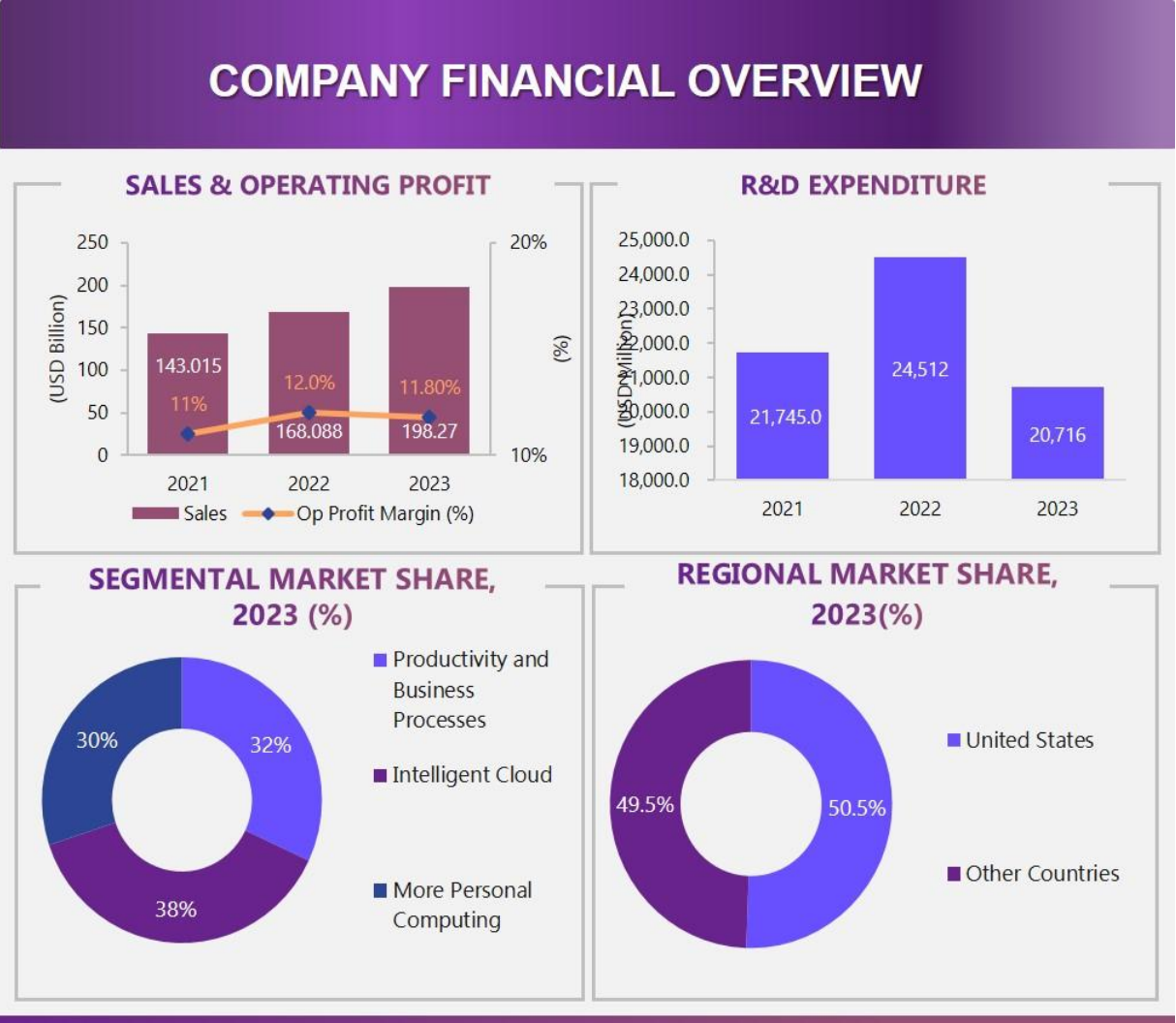
Company Snapshot	
Founded	1993
Headquarter	US
Operating countries	Worldwide
Expertise	Business Software, Developer Tools, Home & Educational Software, Tablets, Search, Advertising, Servers, Windows Operating System, Windows Applications & Platforms, Smartphones, Cloud Computing, Quantum Computing, Future of Work, Productivity, AI, Artificial Intelligence, Machine Learning, Laptops, Mixed Reality, Virtual Reality, Gaming, Developers, and IT Professional
Website	https://www.microsoft.com/en-in
Workforce	2,38,000 (approximately)

Microsoft Corporation (Microsoft) is one of the leading providers of software, services, devices, and solutions. Its products include operating systems, cross-device productivity applications, server applications, business solution applications, and desktop and server management tools. The company operates through three business segments: productivity and business processes, intelligent cloud, and more personal computing. The productivity and business processes segment includes products and services for communication and information technology. The company's productivity and business processes segment offers products and services related to communication and information technologies. Office 365 is its cloud-based service that provides access to Office and other productivity services. SQL Server, Windows Server, Visual Studio, System Centre, and related CALs, GitHub, and Azure, are among the public, private, and hybrid server products and cloud services offered by the Intelligent Cloud division as Premier Support and Microsoft Consulting Services. Gadgets such as personal computers (PCs), tablets, games and entertainment consoles, other intelligent devices, and related accessories are also designed, manufactured, and sold by the company. The more personal computing segment offers the Windows operating system, devices, gaming platforms, and search engines.

Category	Product
Microsoft 365	<ul style="list-style-type: none">Microsoft AzureAzure DevOpsMicrosoft Dynamics 365Microsoft 365Power BIMicrosoft TeamsAzure AI and Machine LearningAzure IoTPower Automate

COMPANY PROFILES

MICROSOFT CORPORATION (MICROSOFT): FINANCIAL

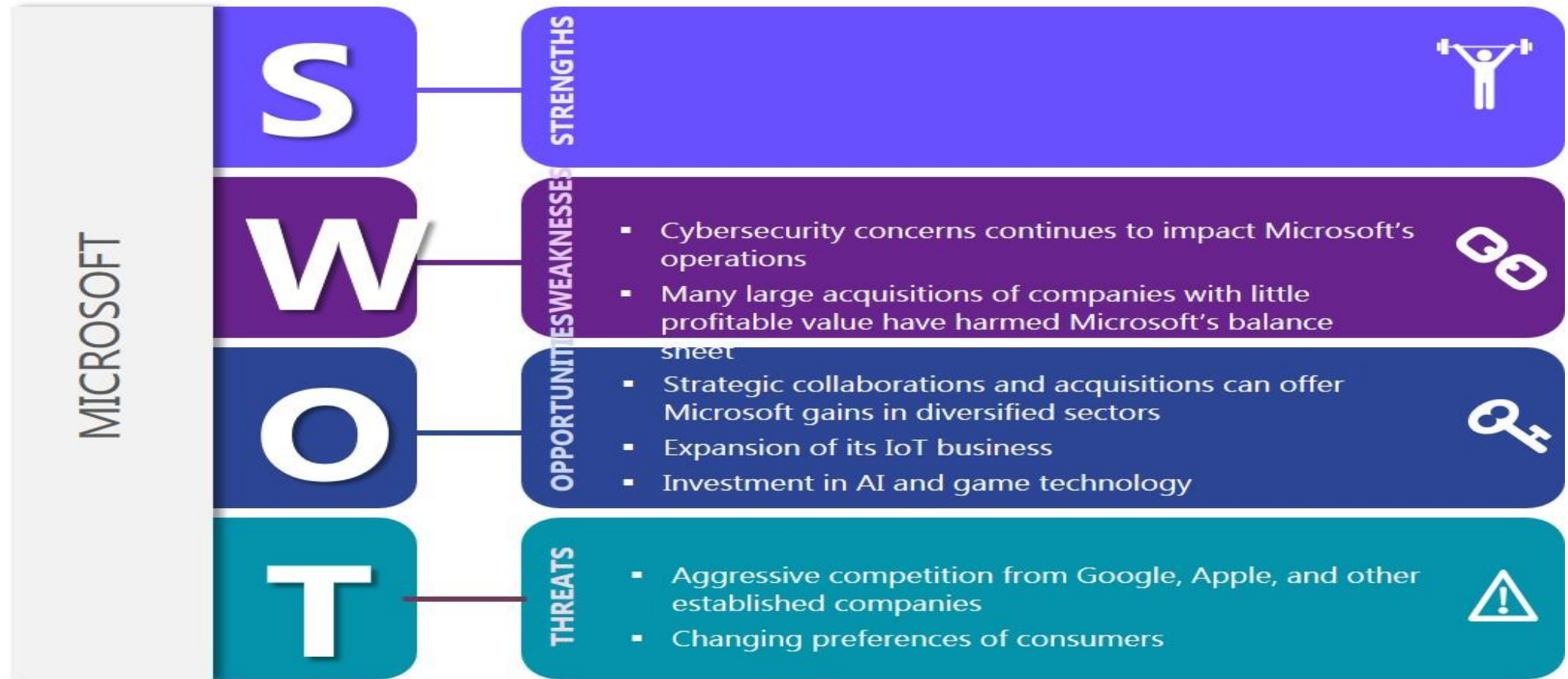


Microsoft Corporation (Microsoft): STRATEGY

Microsoft’s business strategy focuses on technology innovation that helps it maintain its position in a competitive environment. The company is focused on developing its complete intelligent solutions portfolio by investing heavily in its Azure platform and building AI-integrated cloud-based services. The Azure platform enables its users to develop, deploy, and manage applications without altering the underlying platform, thereby offering an enhanced user experience. The company aims to make its suite of cloud-based services platform-agnostic, making them widely available while maintaining its security to expand its consumer base. Microsoft's key strategy for digital transformation focuses on empowering organizations to achieve more by leveraging cloud, AI, and data-driven technologies. Through its Azure cloud platform, Microsoft enables businesses to modernize their infrastructure, improve operational efficiency, and scale globally. Dynamics 365 and Microsoft 365 streamline business processes and collaboration, while Power BI and Power Apps empower users to make data-driven decisions and create custom solutions. The integration of advanced AI, machine learning, and IoT capabilities facilitates innovation, while Microsoft’s focus on security, compliance, and governance ensures safe and scalable digital transformation across industries.

COMPANY PROFILES

MICROSOFT CORPORATION (MICROSOFT): SWOT ANALYSIS



CASE STUDIES



CASE STUDY – AI in Finance – Fraud Detection in Banking

Growth Problem:

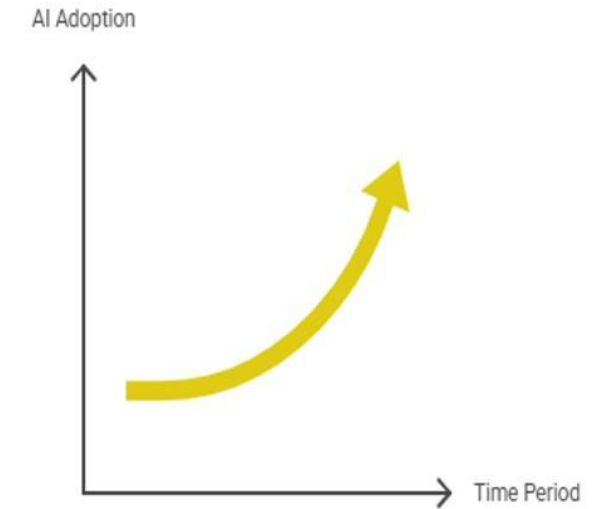
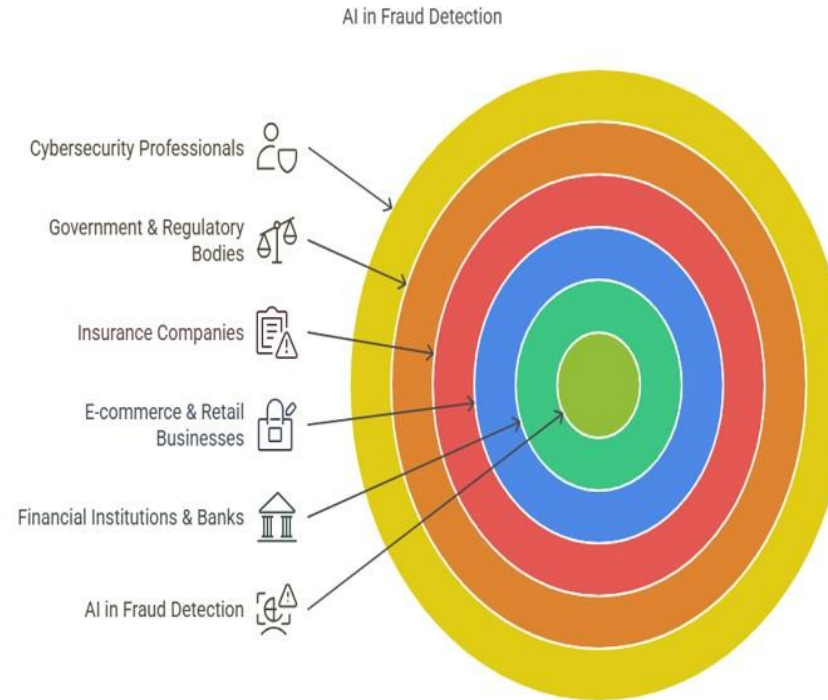
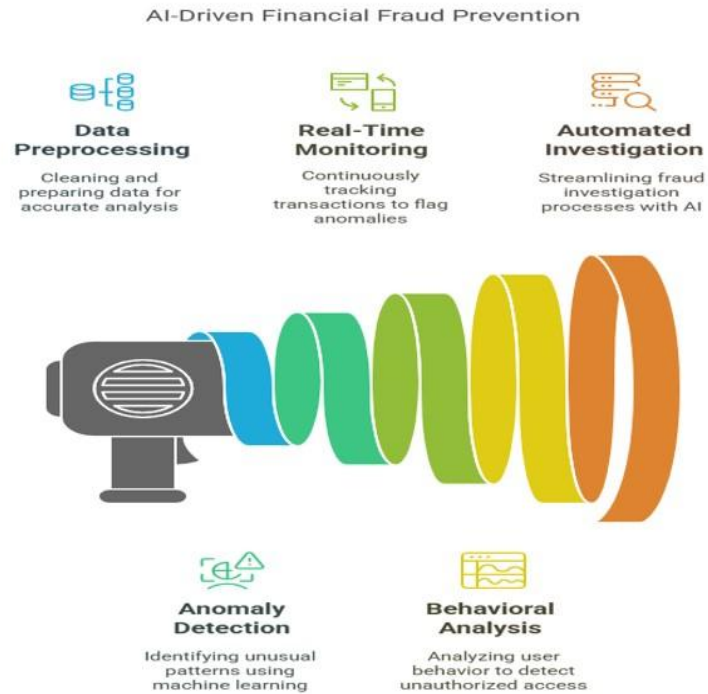
Financial fraud, such as credit card fraud, identity theft, and money laundering, is a growing concern for banks and financial institutions. Traditional rule-based fraud detection systems struggle to keep up with evolving fraud techniques, leading to financial losses and reputational damage. A more advanced, AI-powered solution is needed to detect and prevent fraudulent transactions in real time.



Value Deliver

Target Personas

Adoption of AI in Finance



Increasing Adoption of AI in Finance

Conclusion:

The integration of AI in fraud detection significantly reduced false positives and enhanced fraud prevention mechanisms. AI-powered systems detected fraudulent transactions faster and more accurately than traditional methods, protecting both customers and financial institutions. However, challenges such as evolving fraud tactics and AI model biases require continuous improvements. With ongoing advancements, AI remains a critical tool in safeguarding financial systems against fraud.

RESEARCH METHODOLOGY AND APPROACH

Section Highlights

- Research Methodology
- Assumptions and Limitation

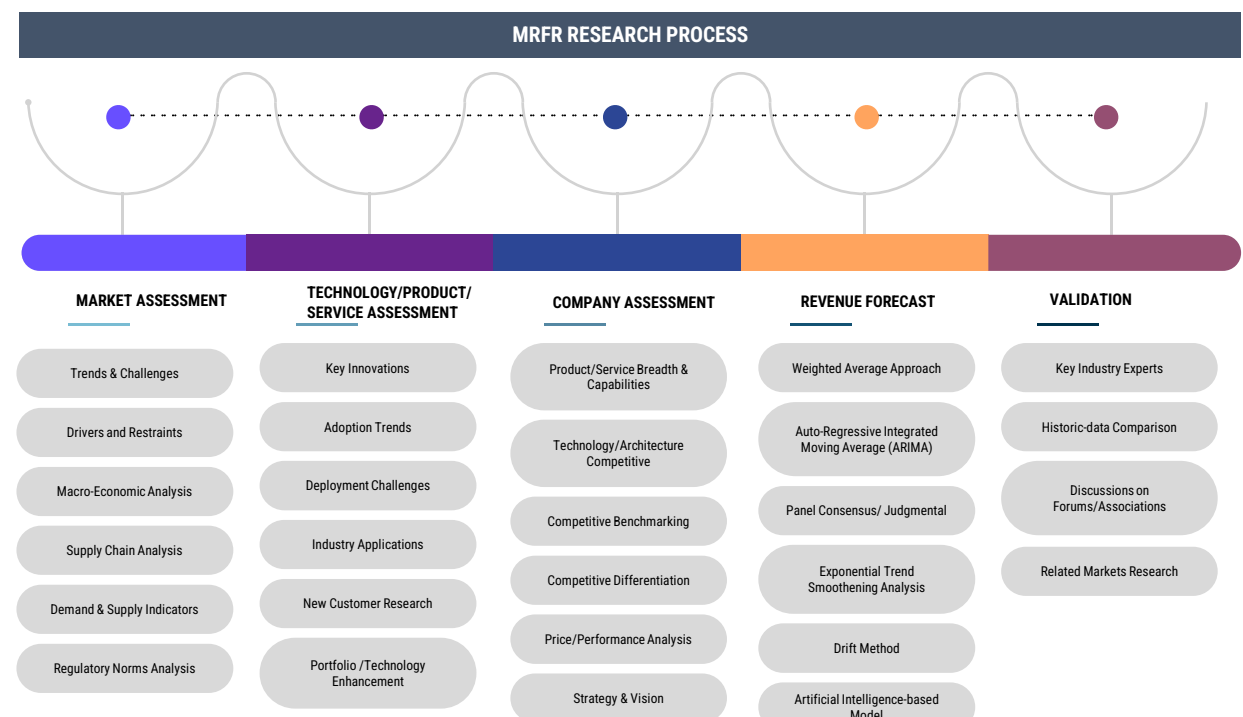


3 RESEARCH METHODOLOGY

3.1 OVERVIEW

The research starts with the extensive procurement process of data/information and statistics from company annual reports, government websites, statistics agencies, and paid databases. This information creates a base for the study. The information also helps to define the scope and to narrow down the area for study for the market. This raw information is processed and analyzed to extract crisp data points which currently affect or are likely to affect the industry during the forecast period. After analyzing the information, a proprietary statistical tool is used for market estimation and forecast, which generates the quantitative figures/sizes of the market/sub-segments in the current scenario as well as for the forecast period.

After estimating the market sizes and estimates, the numbers are verified with industry participants and key opinion leaders. The wide network of industry participants add value to the research and verify the numbers and estimates provided in the study. At the last stage of the research process, a final report is prepared, which is then published on different websites as well as distributed through various channels. The below figure contains the different stages of the research process to produce the report.



Market Research Future (MRFR) is associated with consultants, partners, and organizations of various categories across the globe wherein the MRFR research team works in close association with them to understand the market from the ground level. Therefore, we have existing incubated warm sources/contacts within the supply chain of major competitors operating in the global markets. We leverage these connects to gather meaningful insights and understand regional/country/global trends. Lastly, we also gather insights and data from Interactive platforms wherein we interact with local/regional consultants and freelancers. The mode of these interaction is often data exchange or paid interactions.

We procure data from secondary sources as well as paid databases to gather insights. However, the sources in the study can be majorly grouped into four categories, Industry Associations, Regional Organizations, Industry Specific Organizations, and Leading Private Institutions.

Industry Associations



Some example sources & macroeconomic indicators retrieved:

- IMF: Economic Outlook, Exchange Rates, Etc.
- OCED: Statistical Market Analysis
- World Bank: Development and Economic indicators
- Trading Economics: Country Level Data
- Statical Studies

Industry Specific Organizations



Some example sources & macroeconomic indicators retrieved:

- Global IT Infrastructure Association (GITIA)
- AFCOM
- Open Network Infrastructure Association
- Information Technology Professionals Association (ITPA)
- Institute for Digital Transformation
- Cloud Computing Association (CCA)
- Industry IoT Consortium (IIC)
- Among others

Regional Organizations



Some example sources & macroeconomic indicators retrieved:

- Digital Infrastructure Providers Association (DIPA)
- European Association for Digital Transition
- Information Technology Industry Council
- Among others



Leading Private Institutions



Some example sources & macroeconomic indicators retrieved:

- Bloomberg
- AlphaSense
- IDC (International Data Corporation)
- ITIL (Information Technology Infrastructure Library)
- TM Forum (Digital Transformation for Telecom & IT)
- Among others

RESEARCH METHODOLOGY

3.2 DATA FLOW

Data flow is an extensive part of our research process. It involves the procurement of market data and related information from different verified and credible sources. This step helps to obtain raw information about the market and their segments, the process for different end uses, the pool of market participants, and the nature of the industry and scope of the study. The data flow process comprises of **data sources, data collection, data processing, data forecasting, data quality and data access**.

3.3 DATA FLOW

- Includes company databases such as Hoover’s: This helps us identify financial information, industry competitive landscape, and structure of the market participants. Also, it serves as an important step in market sizing, especially in the case of commodity-flow techniques.
- Industry databases, e.g., Factiva, help us gain access to industry statistics, and Key Opinion Leader (KOL) opinions and formulate conclusions.
- Other sources include SME journals and pertinent databases from third party vendors to gain insights into:
 - Potential Market-Related Statistics
 - Information on Unmet Needs
 - Regional Expenditure Pattern
 - Investment Information or Opportunities Statistics
 - Customer Demographics and Product Preferences
 - Regulatory and Compliance Insights
 - Among others

3.2.1 DATA MINING PROCESS



RESEARCH METHODOLOGY

3.4 SECONDARY SOURCES:

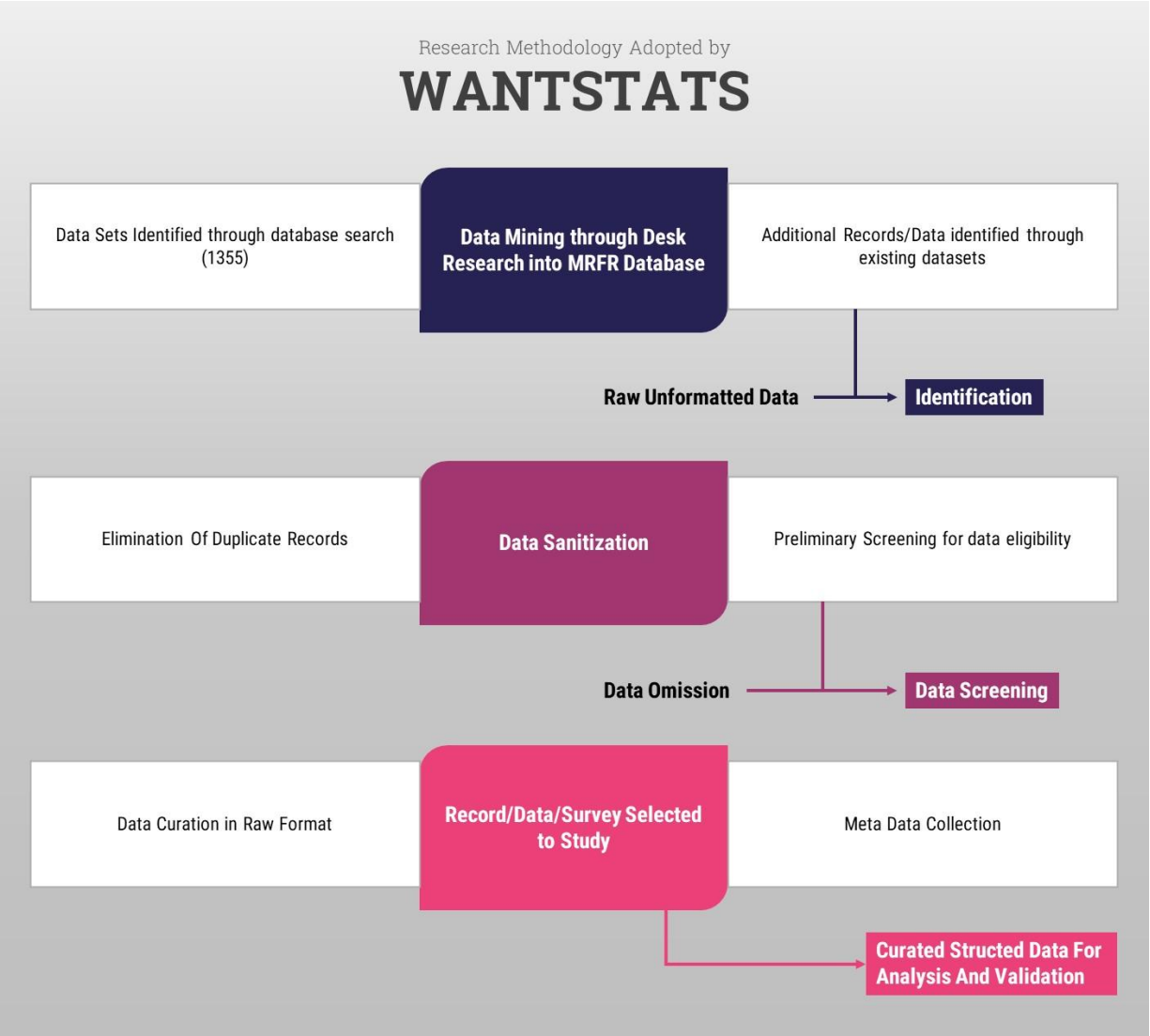
In the secondary research process, various sources are used to identify and gather industry trends and information for the research process. We at MRFR have access to some of the most diversified and extensive paid databases, which give us the most accurate data/information on markets sizes and pricing. Mentioned below is a detailed list of sources that have been used for this study. Please note that this list is not limited to the names as mentioned; we also access other data sources depending on the need.

Notable examples include white papers, government statistics published by organizations like WHO, NGOs, World Bank, etc., KoL publications, company filings, investor documents, etc.

Some of the sources used with relation to GLOBAL AEC MARKET for reference include:

- Global IT Infrastructure Association (GITIA)
- AFCOM
- Open Network Infrastructure Association
- Information Technology Professionals Association (ITPA)
- Institute for Digital Transformation
- Cloud Computing Association (CCA)
- Industry IoT Consortium (IIC)
- Digital Infrastructure Providers Association (DIPA)
- European Association for Digital Transition
- Information Technology Industry Council
- Among others










3.4.1 SECONDARY RESEARCH DATA FLOW:



RESEARCH METHODOLOGY

3.5 PRIMARY RESEARCH:

In the primary research process, in-depth primary interviews are conducted with the CXOs to understand the market share, customer base, pricing strategies, channel partners, and other necessary information. Besides, in-depth primary interviews are conducted with the CXOs of vendors, channel partners, and others to validate the supply-side information. In addition, various key industry participants from both the supply and demand side are interviewed to obtain qualitative and quantitative information on the market. In-depth interviews with key primary respondents, including industry professionals, subject matter experts (SMEs), industry consultants, and C-level executives of major companies, are conducted to obtain critical qualitative and quantitative information pertaining to the market, as well as to assess the prospects for market growth during the forecast period. Detailed information on these primary respondents is shown below.

Department	Data Objectives	Key Designations Targeted
 Infrastructure Solution and Service Providers	 <ul style="list-style-type: none">▪ Industry Demand▪ Growth Trends▪ Challenges & Opportunities▪ Regulations and Compliances▪ Among others	 <ul style="list-style-type: none">▪ Industry Heads▪ Key Opinion Leaders▪ Directors▪ Sales Directors
 System Integrators	 <ul style="list-style-type: none">▪ Industry Vertical Growth▪ Market Demand▪ Key Trends and YoY Change▪ Growth (+) factors▪ Growth (-) factors▪ Among others	 <ul style="list-style-type: none">▪ Sales Directors▪ Vice Presidents Sales /Strategies▪ Product Managers▪ Department Heads▪ CXO
 Sales and Marketing	 <ul style="list-style-type: none">▪ Demand and Consumption Pattern▪ Sales Channels▪ Key Strategies▪ Growth (+) factors▪ Growth (-) factors▪ Among Others	 <ul style="list-style-type: none">▪ Chief Marketing Officer▪ Marketing Team▪ Strategic Consultants▪ D-Level Executives

RESEARCH METHODOLOGY

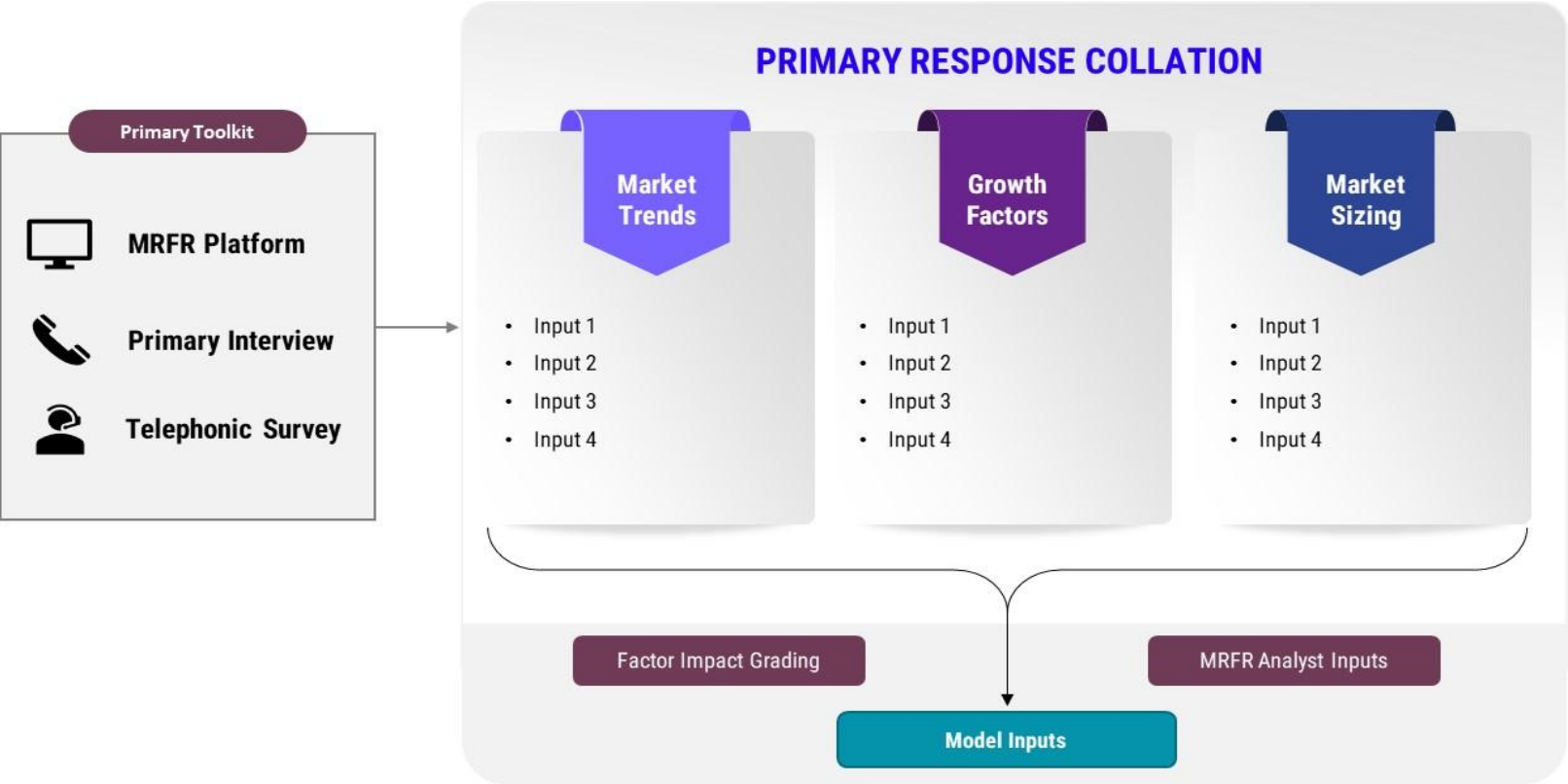
3.5.1 PRIMARY RESEARCH DATA FLOW:

There are 3 major steps followed by our primary research team to collect data:

Stage 1: the MRFR research team actively interacts with KOLs/ industry participants to procure insights and key data points such as Market Share of Key Participants, Key Competitors in regions, Saturation within Competitive Landscape, Demand-supply of Products/services, Key Business Trends, Emerging Opportunity Pockets, Current situation Raw Material supply, Pricing Point, among others.

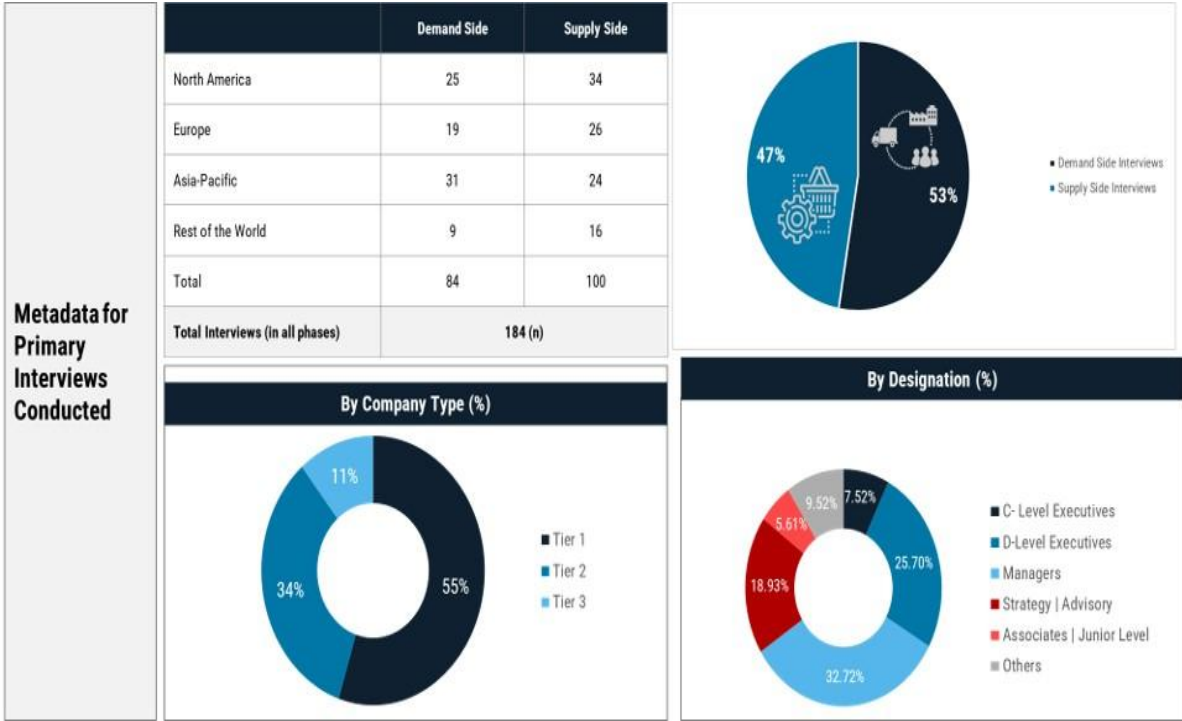
Stage 2: The Primary Research team also connects with partners in key associations in the regional market to gather information on regional players, market trends and growth potential within the same. Please note that these conversations are based upon initial insights and facts gathered through secondary research from Conference Reports, Webinars, Whitepaper Publications, among Others.

Stage 3: Lastly, in order to gather a complete understanding of the market, we conduct extensive primary interviews within house partners and independent consultants. These are mostly ex-industry professional based out of regions of interest, Subject Matter Experts and the interactions are primarily aimed to gather unbiased point of view on the market, and validation of data on market potential, growth to achieve higher accuracy and precision.

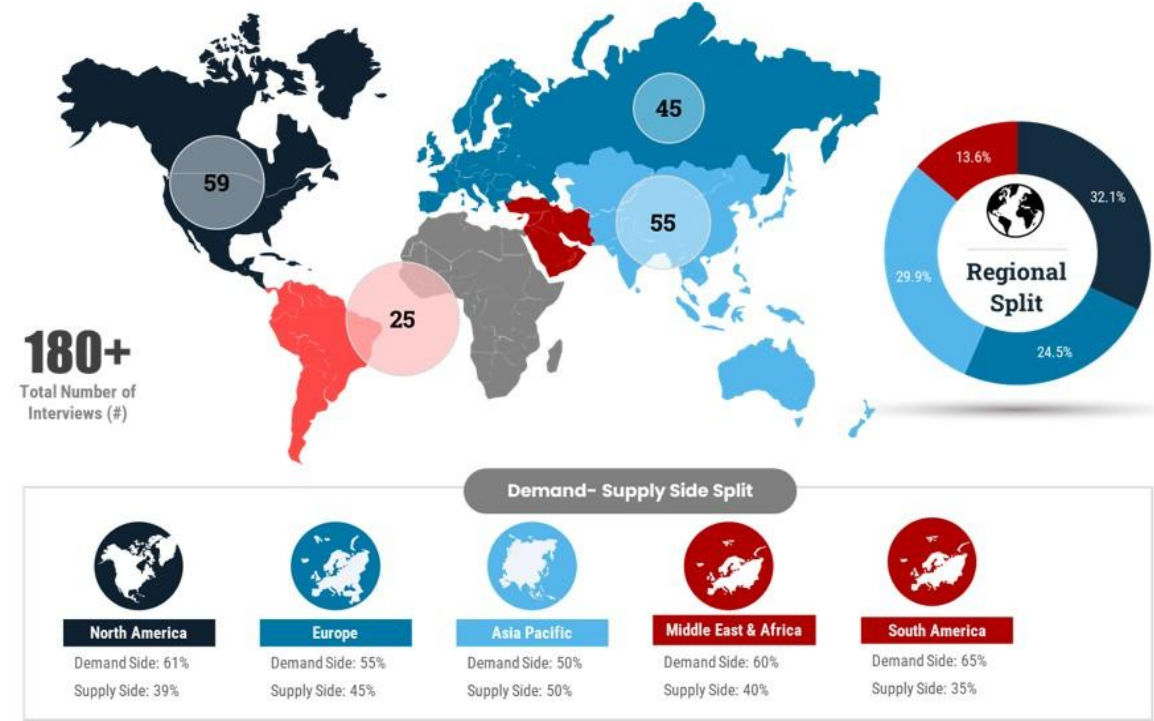


RESEARCH METHODOLOGY

3.5.2 PRIMARY RESEARCH: NUMBER OF INTERVIEWS CONDUCTED



3.5.3 PRIMARY RESEARCH: REGIONAL COVERAGE

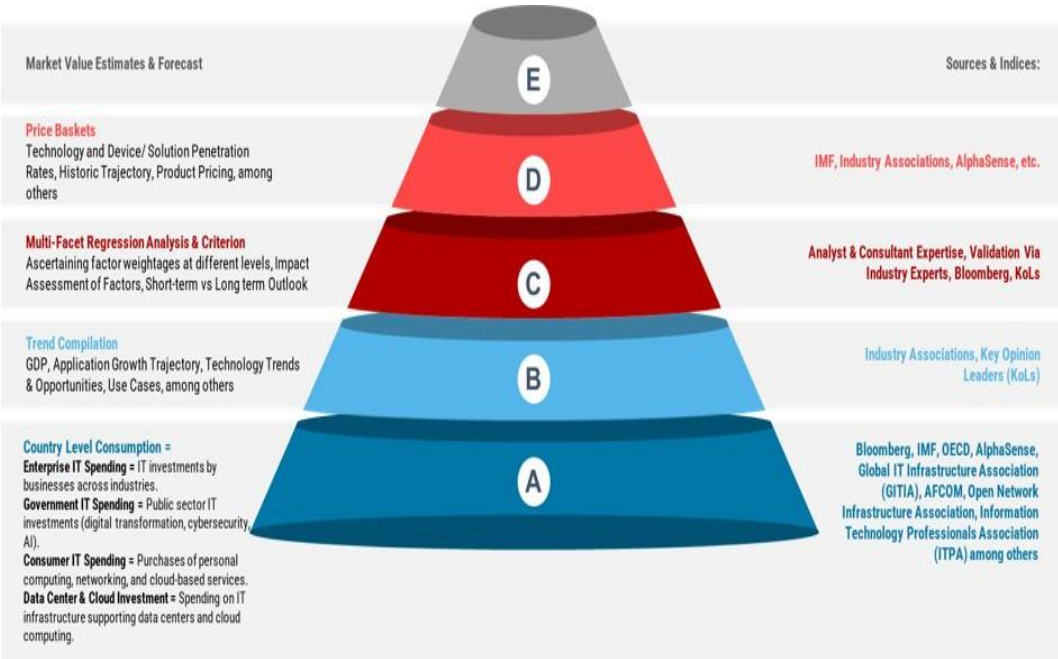


RESEARCH METHODOLOGY

3.6 APPROACHES FOR MARKET SIZE ESTIMATION:

3.6.1 REVENUE ANALYSIS APPROACH

REVENUE ANALYSIS APPROACH IS IMPORTANT IN INSURANCE MARKET TO UNDERSTAND LOCAL PLAYERS AND BUILD CONSUMER BEHAVIOUR TRENDS OVER THEM IN THE INDUSTRY.



3.7 DATA FORECASTING

EXPONENTIAL TREND SMOOTHING (ETS)

ETS FORECASTING AT MRFR

- Exponential Trend Smoothing is a time series forecasting technique that analyzes historical data to identify trends in the data
- The technique involves using a smoothing factor (alpha) between 0 and 1, which determines the weight assigned to each data point
- MRFR uses this technique particularly when historical data is limited or when there is a need to give more weight to recent data
- The accuracy of the forecasts depends on the appropriateness of the smoothing factor chosen and the stability of the underlying data patterns
- Exponential Trend Smoothing is sensitive to sudden changes in the data and adjusts the forecasts accordingly
- The resulting forecasts are generally smoother compared to other techniques like simple moving averages (SMA), Drift method and AI-based prediction model

AUTO-REGRESSIVE INTEGRATED MOVING AVERAGE (ARIMA)

ARIMA FORECASTING AT MRFR

- ARIMA forecast technique utilizes data analysis methods to identify patterns, trends, and correlations in historical data
- Historical data is divided into training and testing sets. The model is trained on the training set to learn the underlying patterns and relationships
- The forecasting process may involve continuous monitoring and updating of the model as new data becomes available. This ensures that the model remains relevant and accurate over time.
- Once the model is validated and deemed reliable, it is used to forecast future outcomes based on new or unseen data
- It employs machine learning algorithms, such as regression, decision trees, or neural networks, to model and predict future outcomes
- The forecasted results are interpreted, and decision-makers use the insights to make informed decisions and formulate strategies

RESEARCH METHODOLOGY

3.7.1 DATA FORECASTING TECHNIQUE

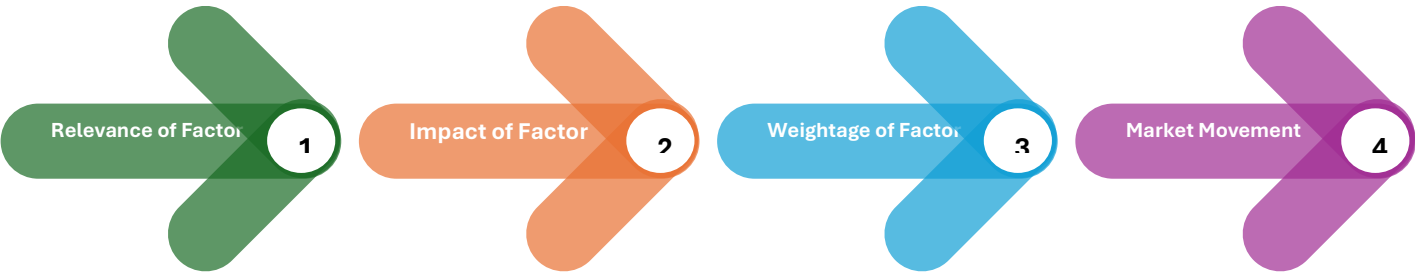
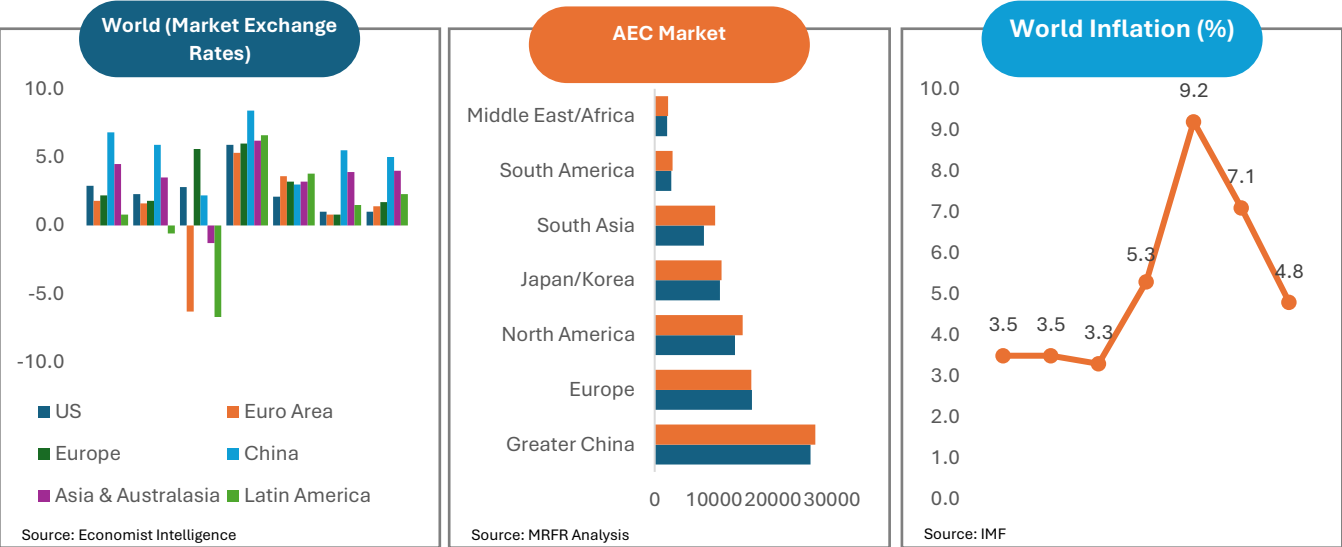
Forecast Technique	Description	Impact	Weightage
Weighted Average Approach	Via this approach, future data is calculated based on the mean of past data under the assumption that some factors –macro economic, regulations, GDP, etc. affecting market in the past will continue to have similar impact in the future.		
Auto-Regressive Integrated Moving Average (ARIMA)	This type of statistical modeling is carried out for predicting and forecasting dependent and independent variables that will directly or indirectly impact the market.		
Exponential Trend Smoothing Analysis	It is based on the principle that a prediction is a weighted linear sum of past observations or lags. The Exponential Trend Smoothing time series method works by assigning exponentially decreasing weights for past observations.		
Panel Consensus/Judgmental	This involves collection of intuitive judgment, opinions and probability estimates of industry experts in case of new or upcoming market/technology for which no prior data is available.		
Drift Method	This approach is used to vary the forecast, that is increase or decrease market factor over time depending on various parameters affecting the change in the trends of the market		
Artificial Intelligence-based Model	MRFR proprietary Artificial Intelligence (AI)/Machine Learning (ML) -based software which makes use of one single/combination of the above-mentioned approaches to predict the future trends		

RESEARCH METHODOLOGY

3.8 DATA MODELING

3.8.1 MICROECONOMIC FACTOR ANALYSIS:

- THIS STEP INVOLVES UNDERSTANDING AND IDENTIFYING THE MAJOR MICROECONOMIC FACTORS. THIS STEP IS DESIGNED TO MANAGE OUTPUTS FROM THE MAJOR FACTORS IDENTIFIED.
- CREDIBLE SOURCES SUCH AS IMF, IEA, EI, S&P, AND OICA ARE USED AS THE BASE.
- OVER 150 COUNTRIES ARE TRACKED TO ENSURE ALL ECONOMIC MOVEMENTS ARE COVERED.
- RAW DATA CAN BE MANEUVERED IN ANY SHAPE OR FORM.
- PREPROCESSING TO ENSURE A HARMONIZED DATA STRUCTURE.



RESEARCH METHODOLOGY

3.8.2 DATA MODELING:

- PENETRATION MODELING FOR PRODUCTS
 - DETERMINING AND FORECASTING PENETRATION VIA ANALYZING PRODUCT FEATURES, AVAILABILITY OF INTERNAL AND EXTERNAL SUBSTITUTES ETC.
 - HEURISTIC ESTIMATION OF YEAR-ON-YEAR SALES BY CONDUCTING PRIMARY INTERVIEWS WITH:
 - MANUFACTURERS
 - INDUSTRY EXPERTS KOLS
 - DISTRIBUTORS SUPPLIERS
 - QFD MODELING FOR MARKET SHARE ASSESSMENT (AN EXAMPLE CITED IN THE FIGURE BELOW)
 - REFERRING TO HISTORIC DATA TO ESTABLISH BASE ESTIMATES
 - ANALYZING CURRENT NEEDS AND DETERMINING PENETRATION TO ESTIMATE MARKET SIZE OR SALES
 - USING UNMET NEEDS AND CAPITALIZATION RATES TO DETERMINE GROWTH

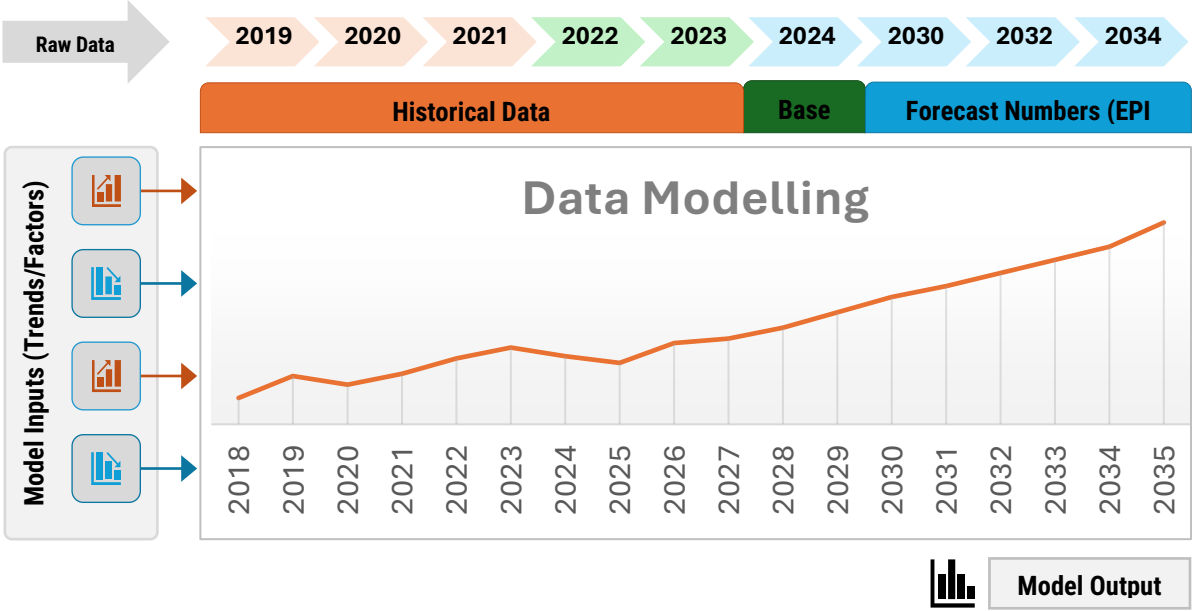


TABLE 1 QFD MODELING FOR MARKET SHARE ASSESSMENT

Scores derived via QFD	Total Revenue from Solutions Services	Enterprise and Government Adoption	Technological Innovations	Automation Capabilities	Global Market Presence Expansion
Product A	10	9	7	9	6
Product B	8	9	4	6	5
Product C	10	7	1	7	9
Product D	4	8	10	9	4
Product E	8	6	6	3	1
Weightage in terms of %			Market Shares as calculated for initial research		
			Avg. Score	Related Market Share	
Total Revenue from Solutions Services	25%	Product A	8.3	24.48%	
Enterprise and Government Adoption	25%	Product B	6.6	19.47%	
Technological Innovations	25%	Product C	6.6	19.34%	
Automation Capabilities	10%	Product D	7.0	20.65%	
Global Market Presence Expansion	15%	Product E	5.5	16.08%	
Total	100%	Total		100.00%	

RESEARCH METHODOLOGY

CEO's MESSAGE



Vinit Ketan

“ In today's fast-paced world, it is crucial to stay agile and adapt to changing market conditions. Our research aims to equip you with the knowledge needed to navigate these challenges and seize the opportunities that lie ahead.

I invite you to explore this research report and leverage its findings to gain a competitive edge in the industry. As always, our team is available to address any questions or provide further assistance. ”

STRATEGIC ADVISORY



Indu Tyagi

“ We understand that each organization faces unique challenges and has distinct goals. That's why our approach is rooted in collaboration and customization. Our dedicated consultants will work closely with you to understand your organization's strategic aspirations and craft tailored recommendations that align with your specific needs and objectives. In today's dynamic and competitive business environment, strategic decision-making is critical for sustainable success. Our team of experienced strategists has worked diligently to analyze market trends, competitive dynamics, and emerging opportunities specific to the industry. Our goal is to empower you with actionable insights and effective strategies that will drive growth and ensure your organization's long-term success. ”

RESEARCH HEAD



Shubhendra Anand

“ We have meticulously gathered and analyzed data from various sources, conducted primary research, and employed robust methodologies to ensure the accuracy and reliability of our findings. Our team of experts has worked tirelessly to uncover the latest trends, identify growth opportunities, and provide valuable insights to help you make informed decisions. I extend my gratitude to our talented team for their commitment and dedication to delivering high-quality research. Their expertise and attention to detail have been instrumental in producing this report. ”

PRINCIPAL AUDITOR



Aarti Dhapte

“ As the Principal Author of this research report, it gives me great pleasure to present our findings and analysis. It has been an exciting and fulfilling journey to delve deep into the subject matter and provide you with valuable insights. This research report delves into the nuances of the market, offering a deep understanding of market dynamics, competitive landscape, and emerging technologies. Our goal is to empower you with actionable information that can drive your business forward. ”

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OUR CERTIFICATIONS



Information Sercurity
Management

Certificate Number:

305025021744IS



Certified
Company

Certificate Number:

E20250218550



International Organization
for Standardization

Certificate Number:

22800551879MO

ESOMAR²⁵

Corporate

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