AEC ADVISORS

AI: AEC Industry Status and Adoption Success

Survey Analysis and Results

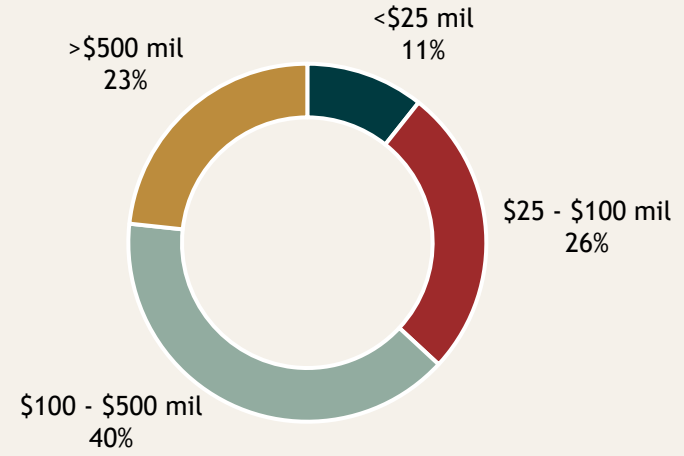
October 2026

AI Status & Adoption Survey Participants

103 AEC Firms, Totaling $56 Billion in Gross Revenue[1]

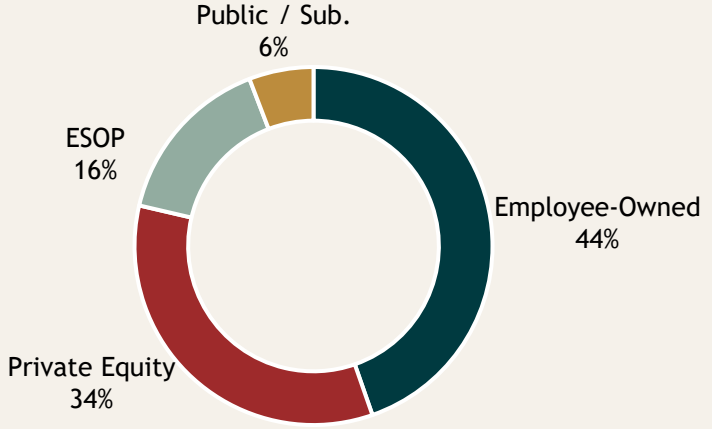
Acentech
AJi Group
Allnorth Consultants
Apex
APSI
ARS Engineers
AtkinsRéalis
Atlas
Aventia
Barge
Barr Engineering
Bennett & Pless
BNP Associates
Bowman Consulting
BRPH
Burgess & Niple
Cape Environmental
Cal y Mayor
CDM Smith
Centurion
CivilOne
Colliers Engineering & Design
Consor
DBM Vircon
DCCM
DJ&A
DKS Associates
Dudek
EA Engineering
EGIS
Enercon Services
Enovate Engineering
ENTRUST Solutions
Entuitive
ESA
Foresite Group
GDS Associates
Geosyntec Consultants
GFT
H.H. Angus
Haley & Aldrich
Halker Consulting
Harris Group
HFW Companies
HR Green
IMEG
ICE
ISL
J-U-B Engineers
Jensen Hughes
K2M Design
Keller Associates
Kleinfelder
KLJ
Klohn Crippen Berger
KS Engineers
Landau Associates
Langan
LJB
Loring Consulting Engineers
MBP
McAdams
McElhanney
Merrick
Nova Eng & Env
Parametrix
Plummer Associates
PRIME AE Group
Prudent Engineering
PS&S
R2T
RAM Consulting
Rincon Consultants
RJC Engineers
RJN Group
Sargent & Lundy
Scott Russell
SCS Engineers
SE3
Sevan
Shermco Industries
SEH
SGH
SME
SPEC Services
Stantec
Stratus
SWCA
Systra
T&M Associates
The Carian Group
Trihydro
Trilon Group
Trinity Consultants
TTL
TYLin
UES
VHB
Walker Consultants
WalterFedy
West Yost Associates
WGI
WSB

By Size



Median Gross Revenue Size = $141 mil

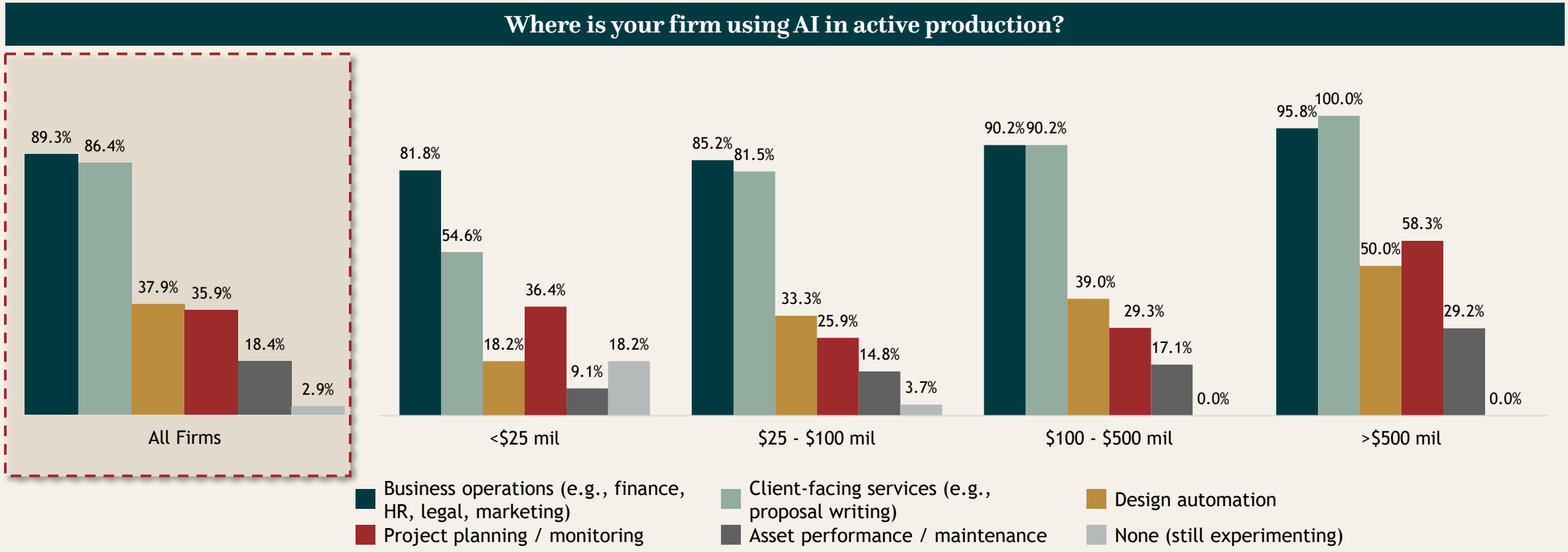
By Ownership



[1] 2025 gross revenue figures

AI in Active Production

AI In active production (beyond testing or experimentation), % of firms in each size tier, firms asked to select all that apply



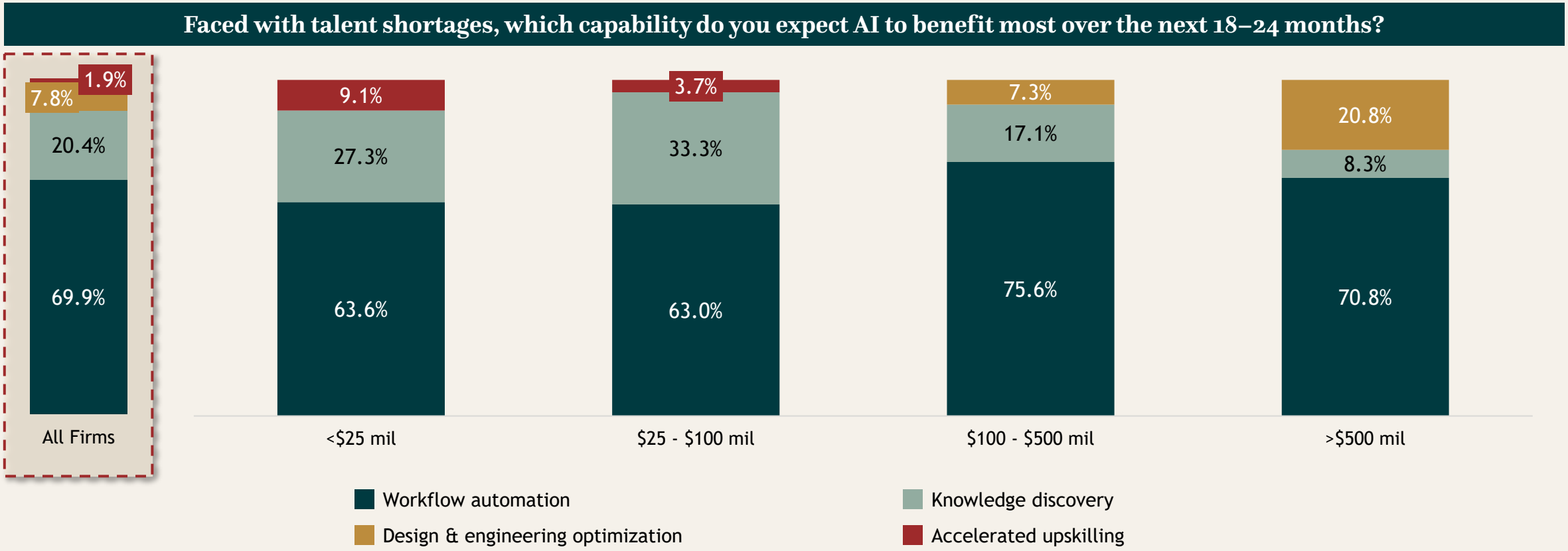
Business operations and client-facing work dominate AI use in production; design automation, project planning, & asset performance trail

- Client-facing services grow with size, reaching 100% of firms >$500 mil in revenues
- Only 3 firms report no AI in production and all are <$100 mil in revenues

Source: 2026 Bentley survey, AI in the AEC industry. Size tiers by 2025 gross revenue: <$25 mil; $25 - $100 mil; $100 - $500 mil; >$500 mil

AI & The Talent Shortage

Capability AI is expected to benefit most over the next 18-24 months, % of firms in each size tier



Workflow automation is by far the capability firms expect to help most with talent shortages

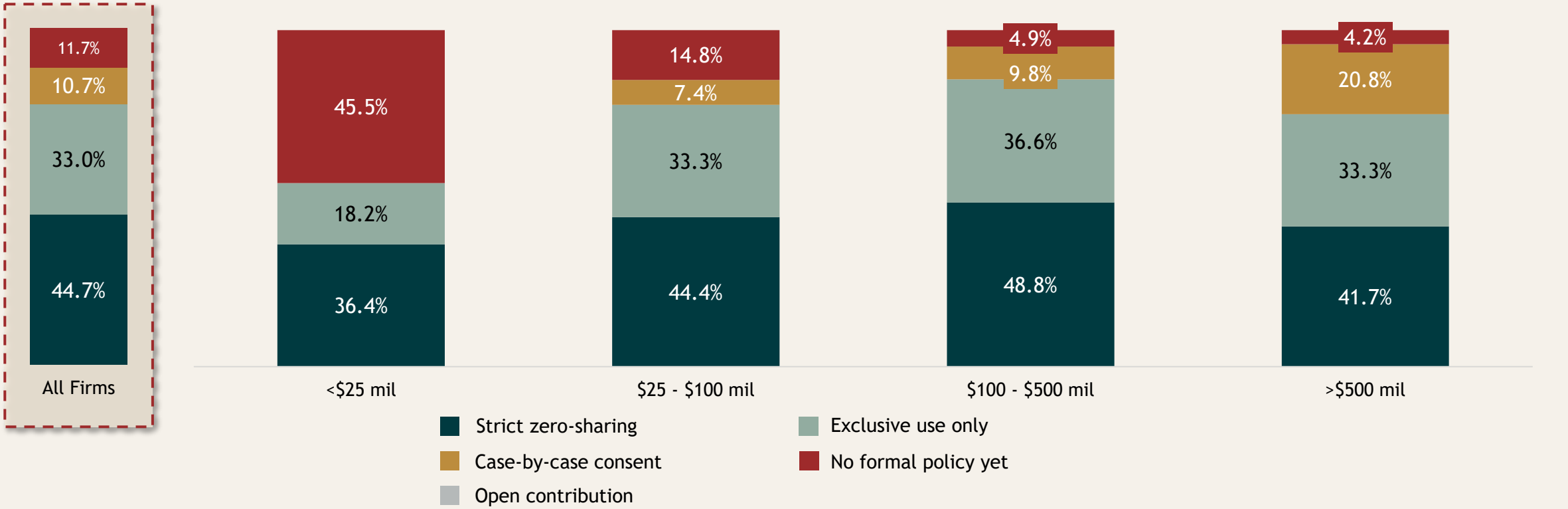
- Interesting that knowledge discovery declines with size and design & engineering optimization emerges as firms get larger

Source: 2026 Bentley survey, AI in the AEC industry. Size tiers by 2025 gross revenue: <$25 mil; $25 - $100 mil; $100 - $500 mil; >$500 mil

AI & Proprietary Data: Vendor Policy

Firm policy on external vendors using proprietary project data to train AI models, % of firms in each size tier

What is your firm's policy on external vendors using your proprietary project data to train AI models?



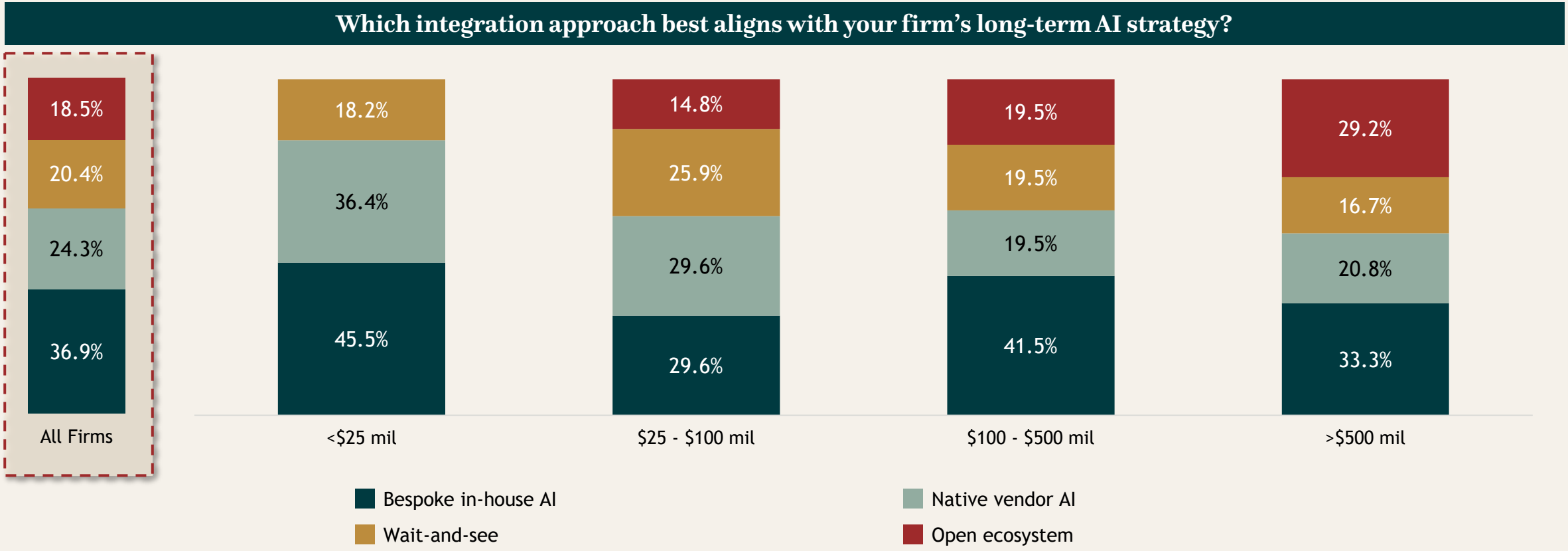
Most firms > $25 mil in revs have formal policies for data usage by external vendors

- However, those policies vary

Source: 2026 Bentley survey, AI in the AEC industry. Size tiers by 2025 gross revenue: <$25 mil; $25 - $100 mil; $100 - $500 mil; >$500 mil

Long-Term AI Integration Approach

Preferred long-term AI integration approach, % of firms in each size tier



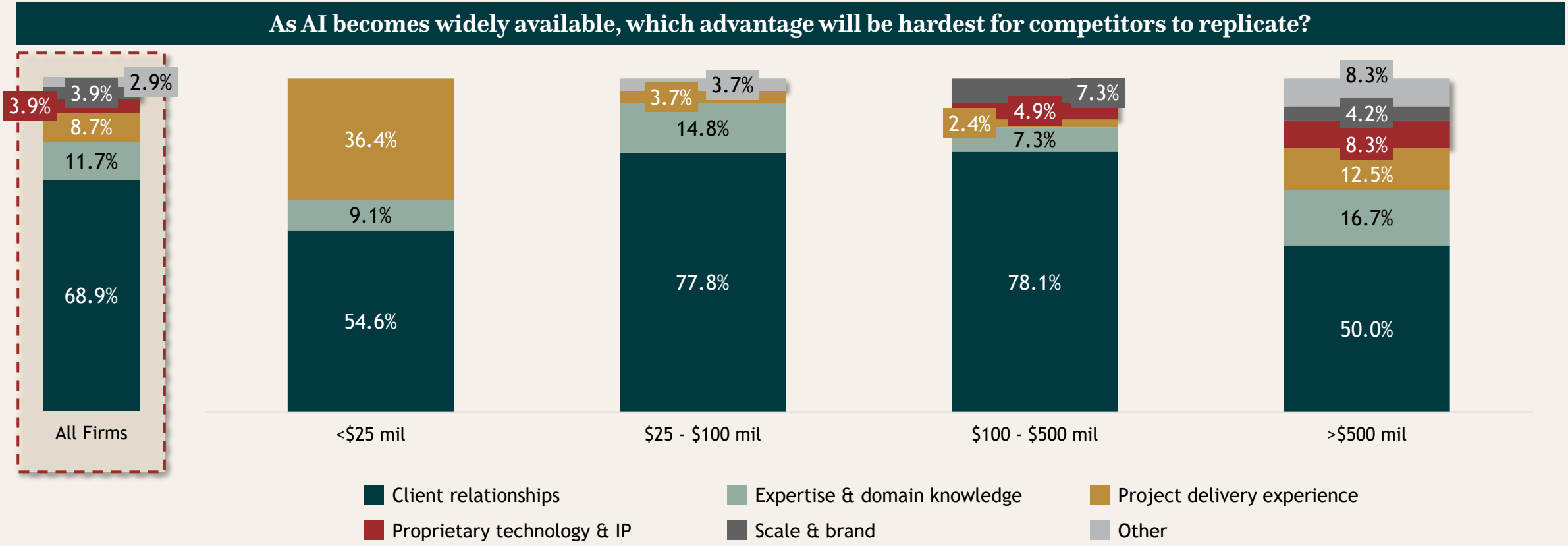
Long-term integration approaches vary by size with few consistent themes

- Open ecosystem appeal rises with size
- Generally, the larger the firm, the less likely a "wait-and-see" approach

Source: 2026 Bentley survey, AI in the AEC industry. Size tiers by 2025 gross revenue: <$25 mil; $25 - $100 mil; $100 - $500 mil; >$500 mil

Hardest Advantage to Replicate

Advantage expected to be hardest for competitors to replicate, % of firms in each size tier



Not surprisingly, client relationships viewed as the hardest advantage to replicate, but largest firms most skeptical of this case

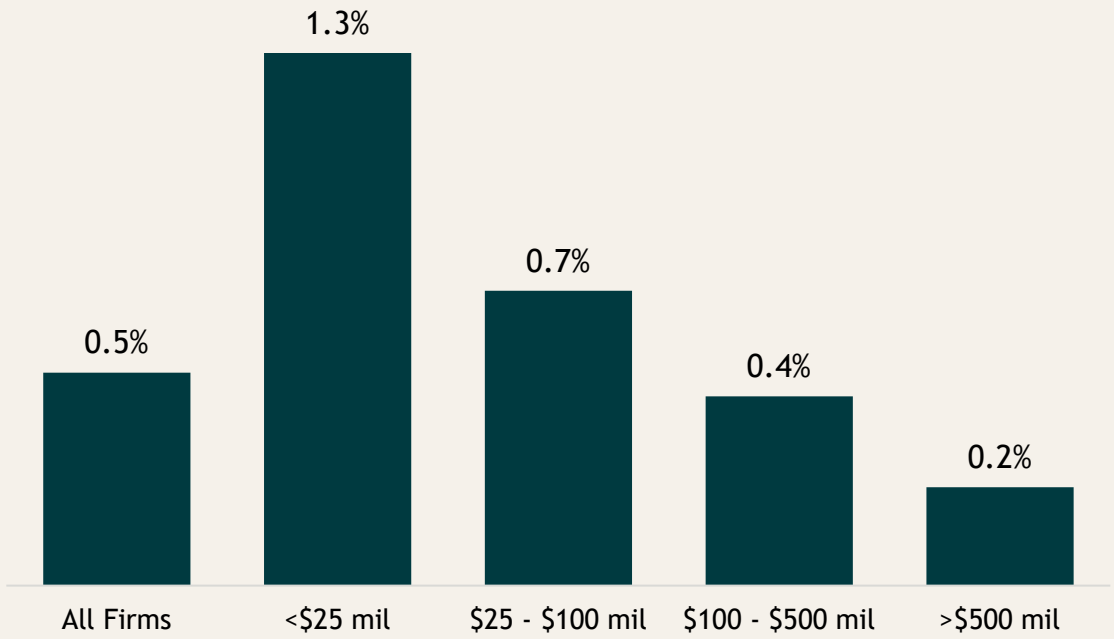
- After relationships, expertise & domain knowledge is considered difficult to disrupt, but a distant second in terms of votes

Source: 2026 Bentley survey, AI in the AEC industry. Size tiers by 2025 gross revenue: <$25 mil; $25 - $100 mil; $100 - $500 mil; >$500 mil

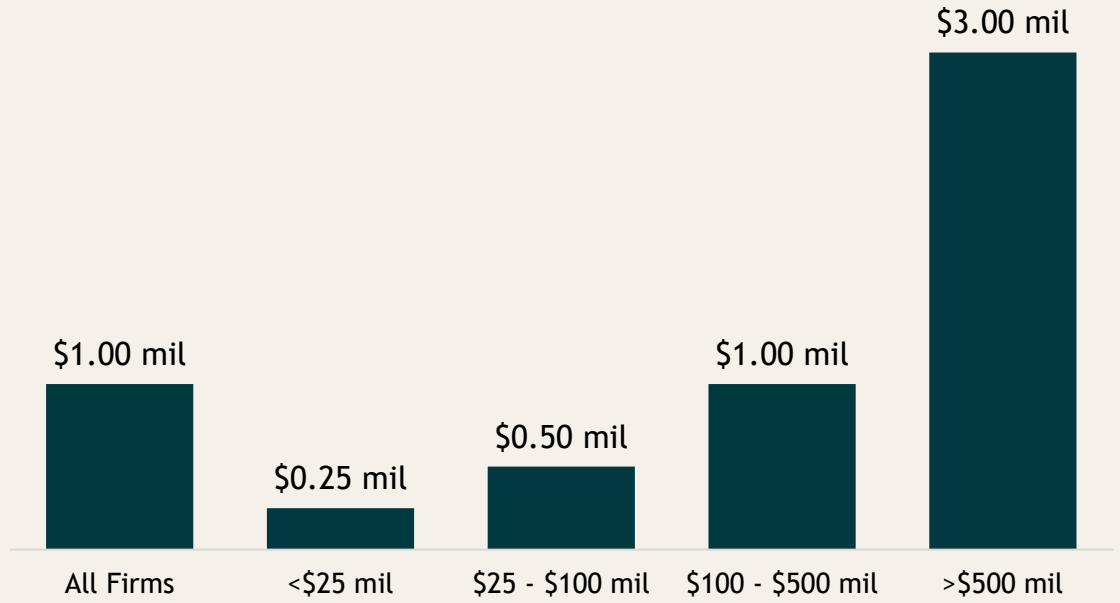
2026 AI Budgets

Annual AI implementation budget today (2026), median by firm size tier; Medians

% of 2025 gross revenue



Annual AI Budget



From our perspective, these seem like very modest AI budgets

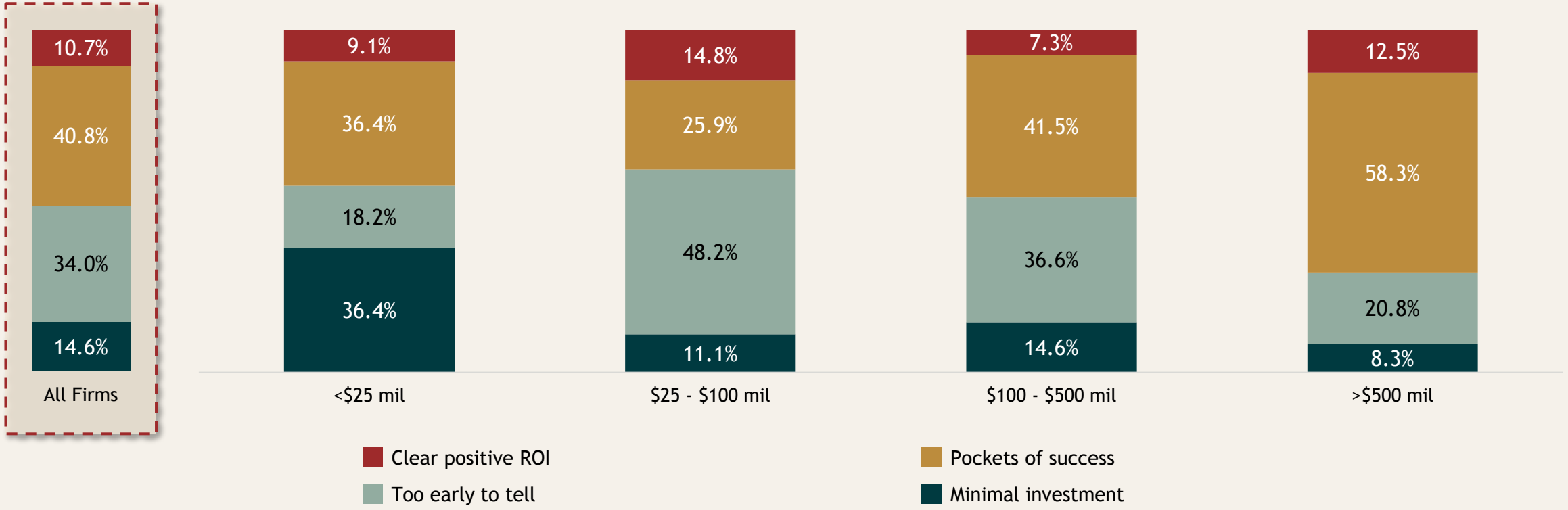
- Economies of scale are evident

Source: 2026 Bentley survey, AI in the AEC industry; <$25 mil, $25 - $100 mil, $100 - $500 mil, >$500 mil. One range answer taken at its midpoint

Current AI Return on Investment

Current ROI from generative and advanced AI technologies, % of firms in each size tier

How would you characterize your firm's current ROI from generative & advanced AI technologies?



Early days for AI usage, so difficult to see clear positive ROI, although some firms are already seeing it

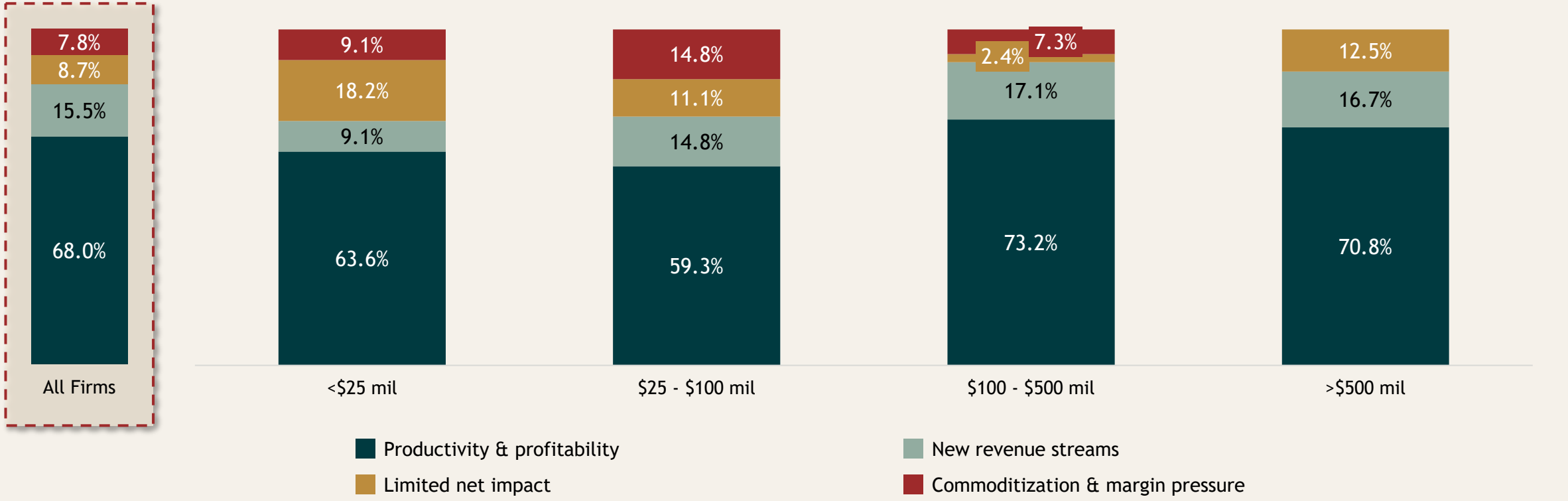
- Larger firms generally more likely to see pockets of success perhaps because they have more users to test technologies & tools or are better at measuring ROI

Source: 2026 Bentley survey, AI in the AEC industry. Size tiers by 2025 gross revenue: <$25 mil; $25 - $100 mil; $100 - $500 mil; >$500 mil

Unlocking AI's Potential - Value Creation

Expected biggest impact of AI on value creation over the next decade, % of firms in each size tier

Looking ahead to the next decade, where will AI have the biggest impact on value creation?



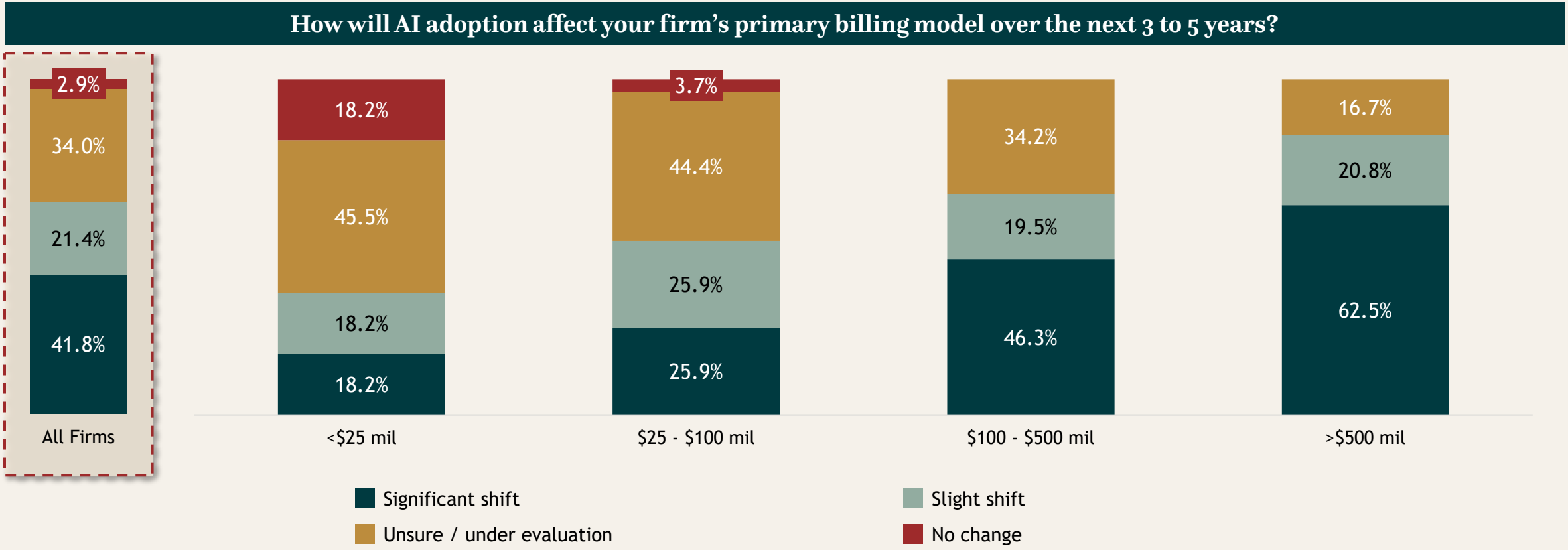
Productivity and profitability is the biggest area for expected value creation

- Commoditization & margin pressure not viewed by many as a threat so a very positive outlook on impact

Source: 2026 Bentley survey, AI in the AEC industry. Size tiers by 2025 gross revenue: <$25 mil; $25 - $100 mil; $100 - $500 mil; >$500 mil

AI & The Billing Model

Expected shift in billing model over the next 3 to 5 years, % of firms in each size tier



Larger firms more likely to expect a significant shift in pricing models due to AI impact

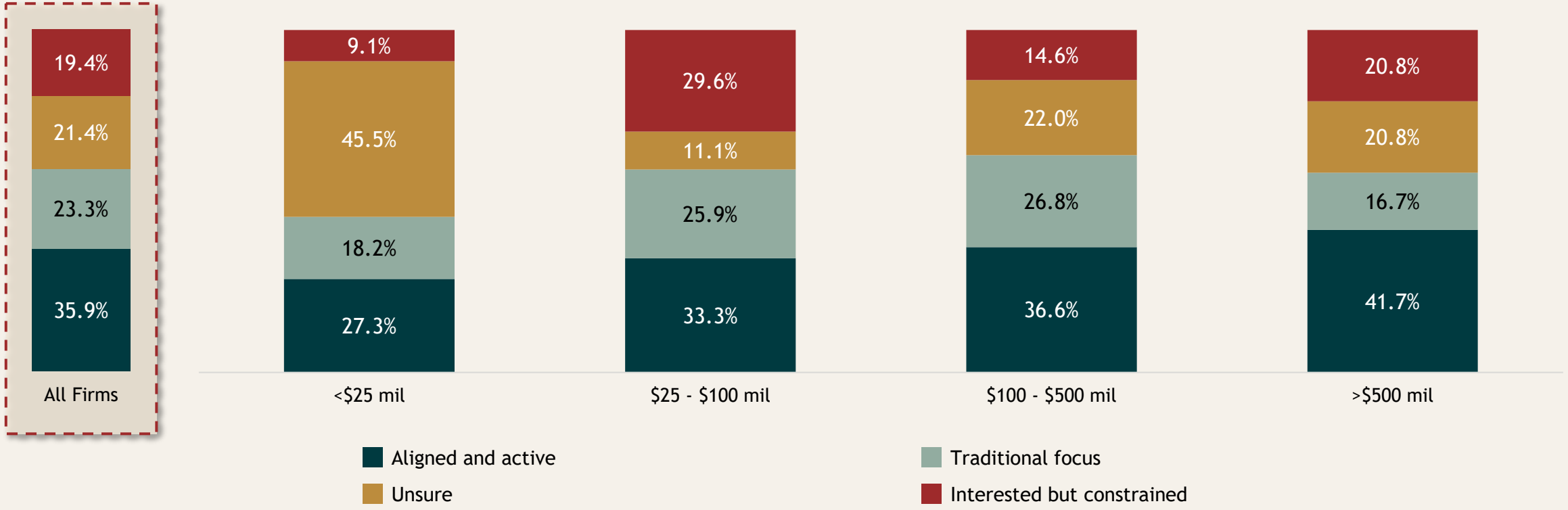
- In contrast, smaller firms still unsure and evaluating the impact
- Presumably, a shift away from T&M and CPFF and towards some form of fixed price / value-add / outcome-based pricing is needed to make AI complementary to our industry

Source: 2026 Bentley survey, AI in the AEC industry. Size tiers by 2025 gross revenue: <$25 mil; $25 - $100 mil; $100 - $500 mil; >$500 mil

Strategy for Proprietary AI & Higher Margin Advisory Services

Firm strategy on shifting toward proprietary AI and higher-margin advisory services, % of firms in each size tier

Which best describes your firm's strategy on the shift toward proprietary AI & advisory services?



Again, larger firms appear more advanced on strategies to shift towards proprietary AI & advisory services, but still minority of firms

- Will be interesting to see how strategies shift with further integration and understanding of AI

Source: 2026 Bentley survey, AI in the AEC industry. Size tiers by 2025 gross revenue: <$25 mil; $25 - $100 mil; $100 - $500 mil; >$500 mil

