

Topic:
AEC

The Project Hosting Scene

250 AEC sites give their views on web-based project hosting services.

iCAD is produced by Business Advantage, a B2B research, business development and marketing consulting practice operating in the global IT, Digital and Telecommunications sectors.

The fanfare over web-based project hosting services for the AEC industry has died down a little, now that it is clear that companies are not exactly flocking to manage their projects in this way. Meanwhile scores of project hosting providers are battling to last the pace - so what is the current state of play on the uptake for these services, and the attitudes to future use? We interviewed managers with responsibility for CAD functions at 256 UK AEC sites to find out.

Project hosting services enable members of a design and building project to collaborate and share drawings and other information via the Internet/extranet.

The Basics

Looking at the most basic levels of information sharing first, we found that 95% of our sample uses email for project collaboration.

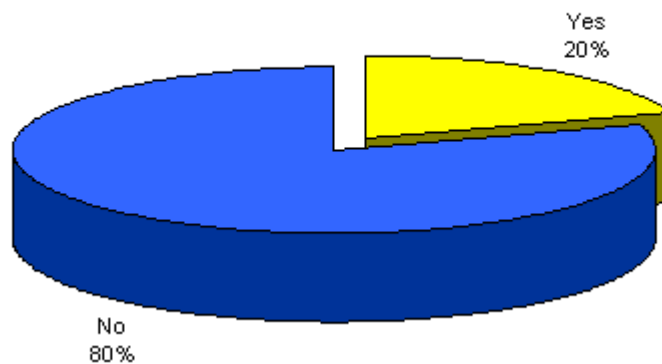
Real Time Talk

Only 9% of our sample takes advantage of technology to facilitate real time communications, e.g. via web meetings or video conferencing.

Hosting Numbers

Looking at the AEC sector as a whole, one in five sites has used a web-based project hosting service in the last twelve months.

Have You Used A Project Hosting Service In The Last 12 Months?



There are however significant differences according to business activity; **only 13% of architectural practices have used such a service, compared to 29% of civil/structural engineering sites.**

These differences are reflected in the use of project hosting services according to company size. Only 10% of sites with less than 25 staff have used such a service (a group consisting mainly of very small architectural practices), compared to 32% of sites with more than 100 staff.

Hosting Frequency

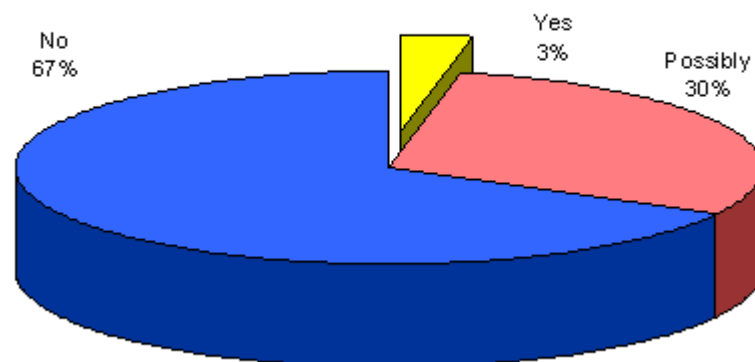
The group of sites that has used a project hosting service is too small (48 sites) for further reliable analysis. Interestingly however:

- only one of these sites has used a project hosting tool for more than half of their projects in the last twelve months;
- 7 sites used such a tool for between 10-50% of projects;
- 40 sites (82%) did so for less than 10% of projects.

Hosting Intentions

We asked those who have not used a project hosting tool whether they intend to do so in the next year. **Again looking at the sector as a whole, only 3% said they definitely anticipated using such a service, and 30% said it was possible that they would.** Two thirds said they would not.

Sites That Have NOT Used A Project Hosting Service - Will You Do So In The Next 12 Months?



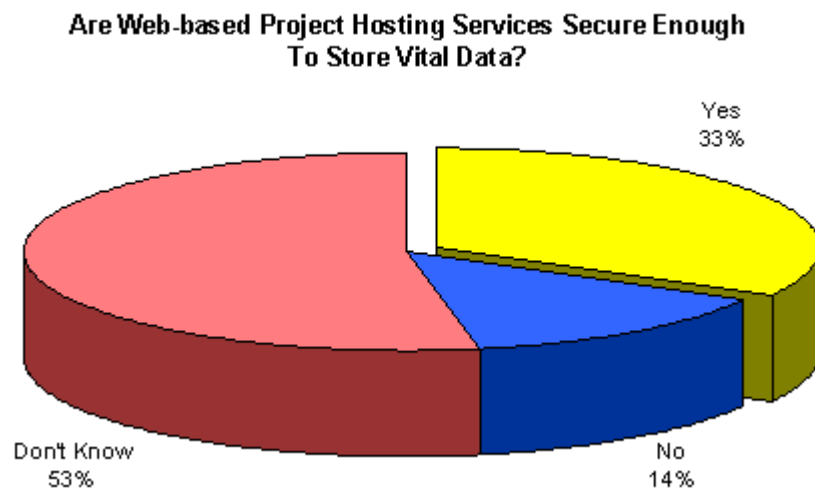
On the face of it these are fairly bleak figures for the project hosting providers. However the picture is distorted by the large number of very small architectural practices in the AEC sector who do not see a need for such collaborative solutions. **Only 17% of architectural sites said they might use a project hosting tool in the next twelve months, compared to 38% of civil/structural engineering sites.**

Reasons Against

Among the sites who said they would not use a project hosting tool, half said that they can see no need to use them. A further 13% felt that their company is 'too small', and 12% felt that they don't know enough about the technology to begin to consider its use. Less than 2% raised concerns about the security of such services.

Security Issues

Project hosting providers can reel off their impressive security safeguards, but how convinced are potential customers that the Internet is secure enough to store project-critical data? When asked this question directly, **a third of the total sample said it is secure enough**, 14% said it is not, and 53% didn't know enough about the issue to comment.



Conclusion

On the face of it the fact that one in five sites has used a project hosting service is quite encouraging bearing in mind they are a relatively new phenomenon. A larger survey is required to determine the extent to which these early adopters are using this technology, but the indications from our sample are that this collaborative approach is far from being ingrained into their way of working.

With only 3% of AEC sites definitely planning to launch into the project hosting world, precision marketing will be essential to secure the custom of the 29% who are at least open to considering the idea. Clearly the many small architectural practices are not going to be a receptive market - civil and structural engineering companies appear to offer the best prospects for growth. However suppliers of project hosting services have a major education task on their hands before the AEC industry embraces this technology. It's often suggested that fears over Internet security or reliability, or the financial viability of providers themselves, are factors impeding take up of these services. In reality however the majority of those not interested in project hosting tools haven't got as far as worrying about such practicalities. They just don't see the need and/or don't understand the potential benefits.

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