



The 2026 ICG Data and Digital Benchmarking Survey Report

Contents

Foreword	<u>3</u>
Executive summary	<u>5</u>
Category highlights	<u>6</u>
Notable maturity trends	<u>9</u>
Key findings and recommendations	<u>10</u>
Category 1. People and culture	<u>13</u>
Category 2. Organisation and governance	<u>16</u>
Category 3. Information and data	<u>19</u>
Category 4. Technology and systems	<u>22</u>
Category 5. Process and operations	<u>25</u>
Category 6. Responsibility and resilience	<u>29</u>
Contributors	<u>32</u>



Foreword

**Ashleigh Rastall, Data and Digital Task Group chair,
Infrastructure Client Group (ICG)**

As chair of the ICG Data and Digital Task Group, I am pleased to present the results of its 2026 Data and Digital Benchmarking Survey. They signal notable developments in key categories – particularly that of people and culture, where progress has historically been slow.

But the more modest advances it reveals in other categories indicate persistent underlying challenges. This report examines these in depth and provides clear strategic direction for the ICG. Its emphasis is on raising the intelligence ambition (for instance, by using data to inform critical decisions), achieving beneficial outcomes and stimulating positive systemic change.

It makes the following key recommendations:

- Align the sector's data and digital initiatives with what matters most, including collaboration, positive infrastructure outcomes and lasting socioeconomic value.
- Give data and digital capabilities the same priority as health and safety, productivity and carbon management.
- Raise the intelligence ambition to unlock value from safe, shared and scalable data.
- Transform common data environments (CDEs) and digital twins into decision-making platforms rather than mere repositories or visualisations.
- Design automation to streamline organisation-wide investment, operations and delivery.

The Data and Digital Benchmarking Survey has been a cornerstone of this task group for many years. It continues to serve as a valuable tool to help members measure cultural and operational changes, compare their digital maturity against that of their peers and identify areas for improvement.

By highlighting areas of strength and weakness, it guides strategic decision-making and resource allocation for maximum impact. It promotes continuous improvement and accountability, helping infrastructure clients to remain adaptable in a dynamic environment.

The wider context for this year's Data and Digital Benchmarking Survey is encouraging. Several recent signals across the sector indicate a stronger focus on the need to extract meaningful value from data. They include HM Treasury's [Balance Sheet Framework](#)

(April 2026) and [UK Infrastructure: A 10-Year Strategy](#), which it co-published with the National Infrastructure and Service Transformation Authority (NISTA) in June 2025. These key documents, along with NISTA's refreshed [Infrastructure Pipeline](#), represent a more joined-up approach in which consistent, trusted information helps to turn long-term strategic intent into effectively prioritised investments, coordinated delivery and measurable benefits.

Regulatory reform is also reshaping expectations. Developing corridor-level transport planning and integrated mobility; scaling up energy investment; and improving healthcare's digital maturity across integrated care systems will all rely on high-quality data to gauge performance, manage risk and coordinate decision-making among organisations.

In parallel, the UK's pro-innovation approach to artificial intelligence – including [BridgeAI](#) and proposed changes to the ISO 19650 standard alongside initiatives such as the [Built Environment Connective](#) – is reinforcing lifecycle information management and interoperability, where data is treated as re-usable infrastructure instead of a delivery by-product. Such examples show that effective data-sharing quickly improves outcomes, making integration a prerequisite rather than an afterthought.

Reflecting on the findings of this year's Data and Digital Benchmarking Survey, I believe that the ICG will increasingly describe data and information initiatives over the next two years as those that deliver demonstrable business results. It will mean prioritising data quality, integration and storytelling, with the aim of ensuring the reliable flow of insightful information across organisations and systems at all times, with data security embedded by design so that safe sharing becomes the norm.

This necessary increase in maturity will need to be achieved in the context of rising workloads and costs alongside persistent skills shortages and constrained supply chains. We must focus on improvements that automate work, remove duplication and improve the quality of decision-making at pace.

Progress towards these objectives can be aided by our ability as a collective to share knowledge and raise standards collectively. Sustained advances will come from coordinated learning and interoperable delivery, not isolated improvements. The ICG Data and Digital Task Group will continue to pursue this approach through its various meetings and publications, sharing lessons learnt and examples of good practice as a leading forum for the exchange of knowledge.

Executive summary

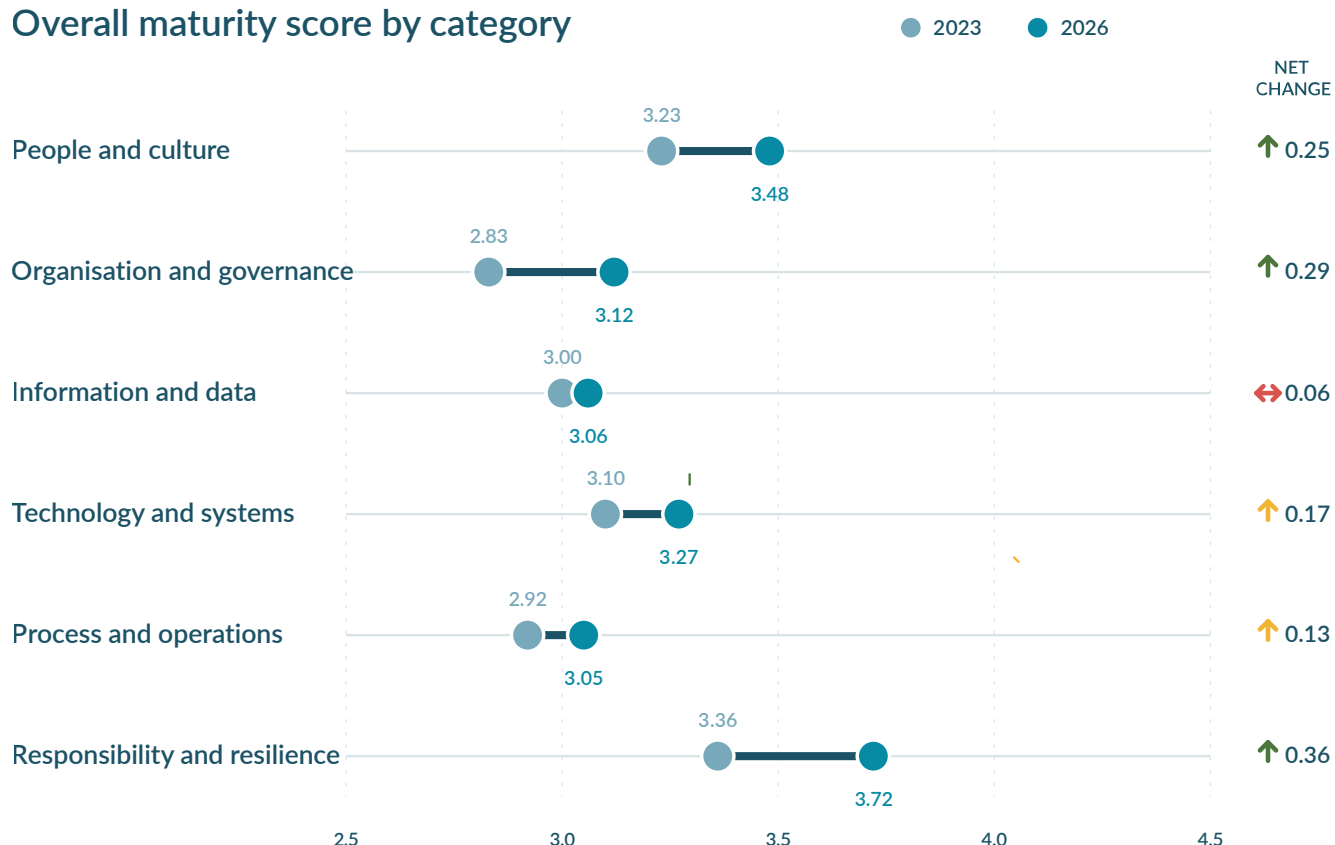
The purpose of the Data and Digital Benchmarking Survey is to evaluate the sector's digital maturity in six categories: people and culture; organisation and governance; information and data; technology and systems; process and operations; and responsibility and resilience.

This year there were 331 respondents, representing both clients and suppliers. Most were in supervisory or management roles, with 10 to 20 years' experience in fields such as project delivery and asset management. They were asked to state the extent to which they agreed with various statements on a scale of one (e.g. strongly disagree/very low/never) to five (strongly agree/very high/always). The questions were consistent with those posed in 2023's survey to aid comparability and trend analysis.

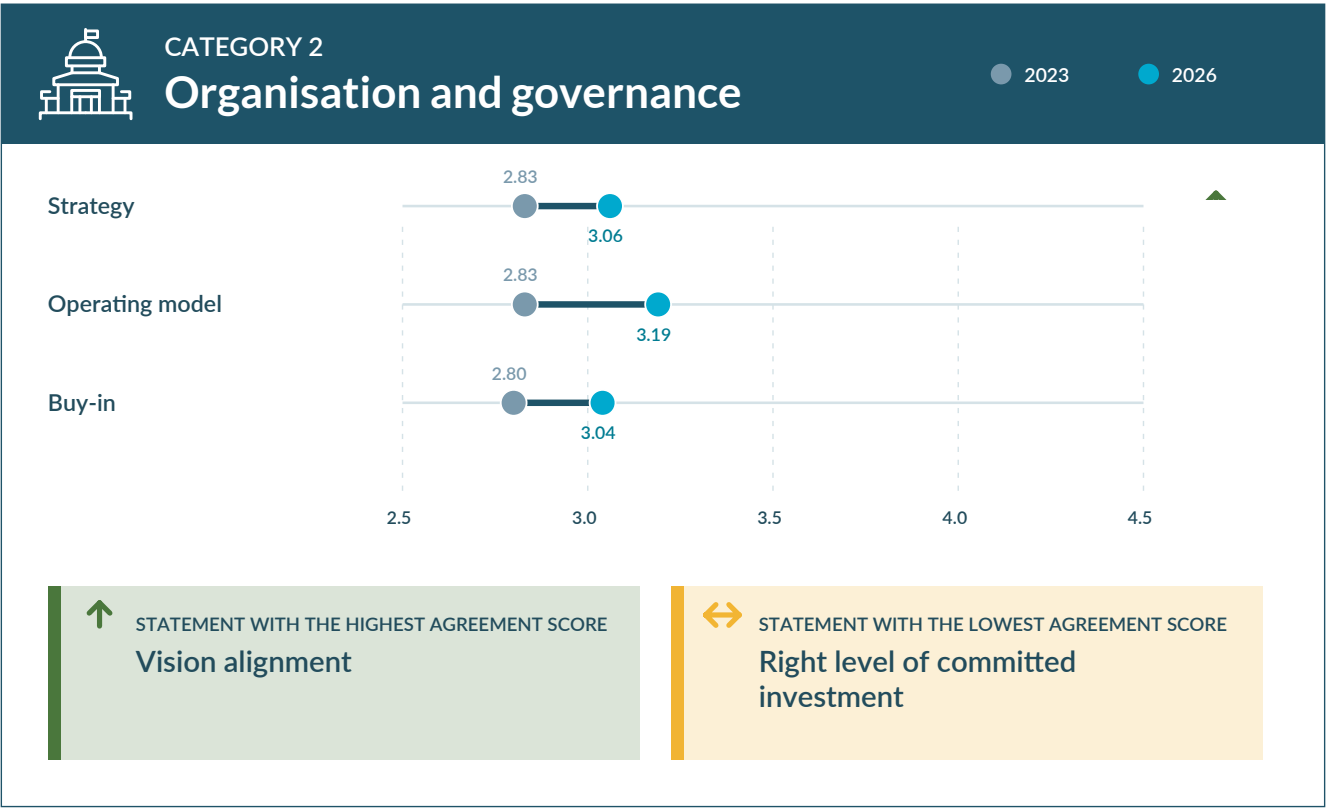
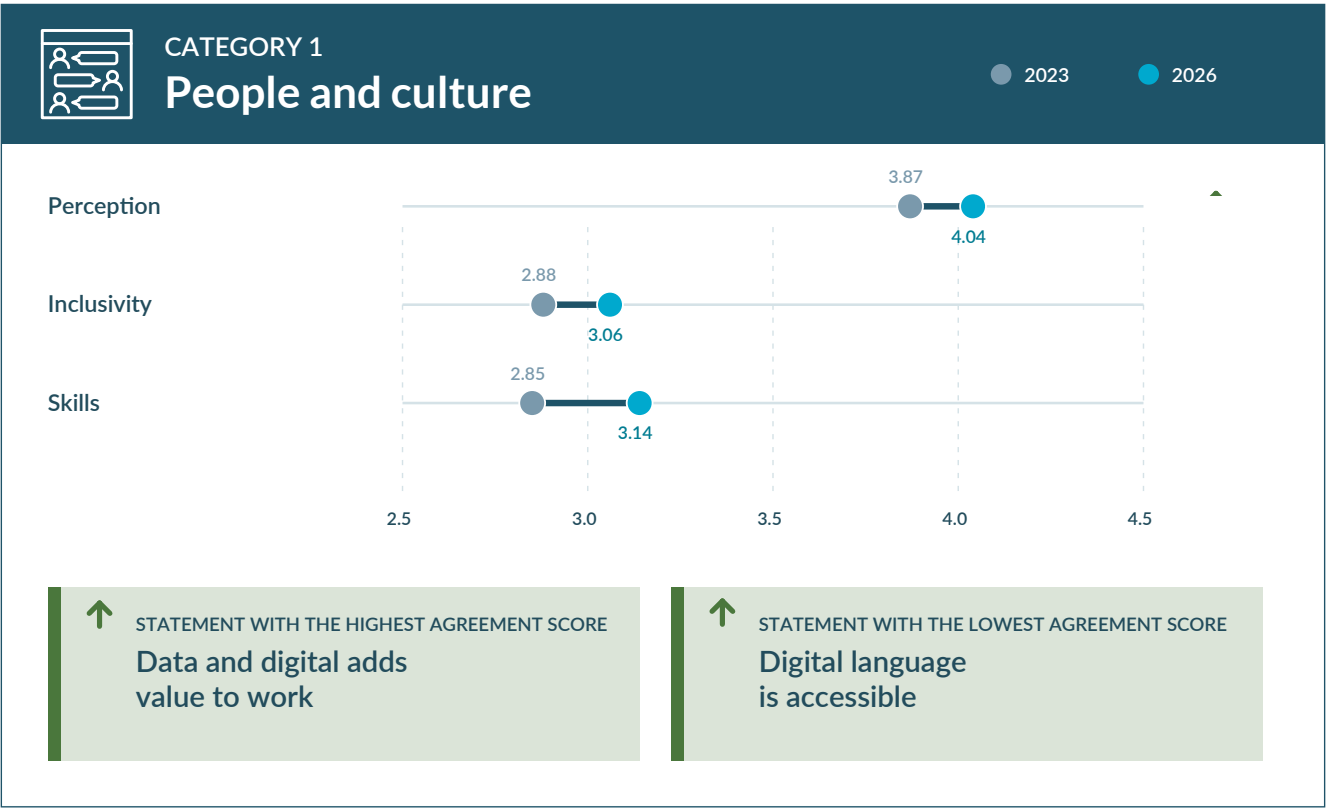
The report compares the surveys' results using a simple arrow system as follows:

↑ for a net increase in respondents' level of agreement that a given statement applied in their organisations from 2023 to 2026; ↓ for a net decrease; and ↔ for no significant change. A red/amber/green colour code indicates at a glance whether a given change of score should be treated as a concern (red) or welcomed (green).

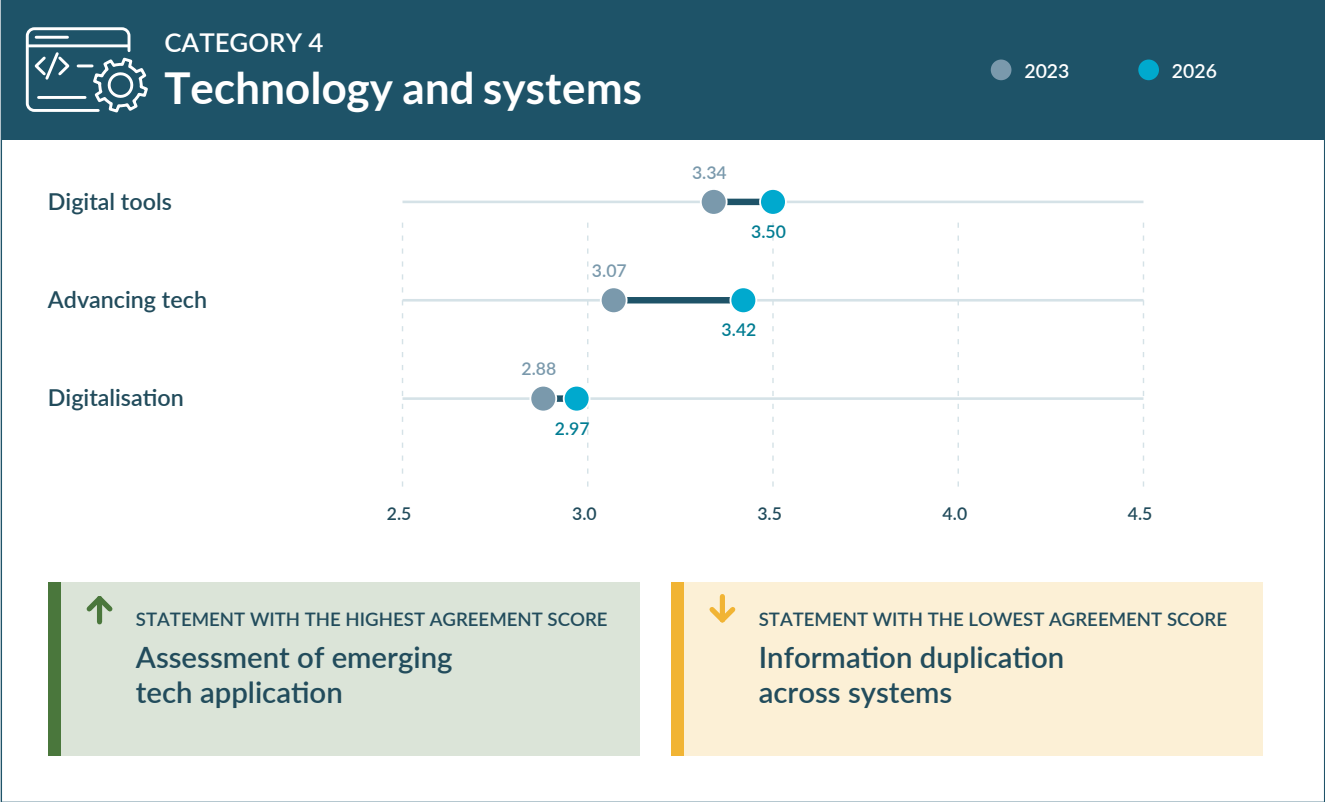
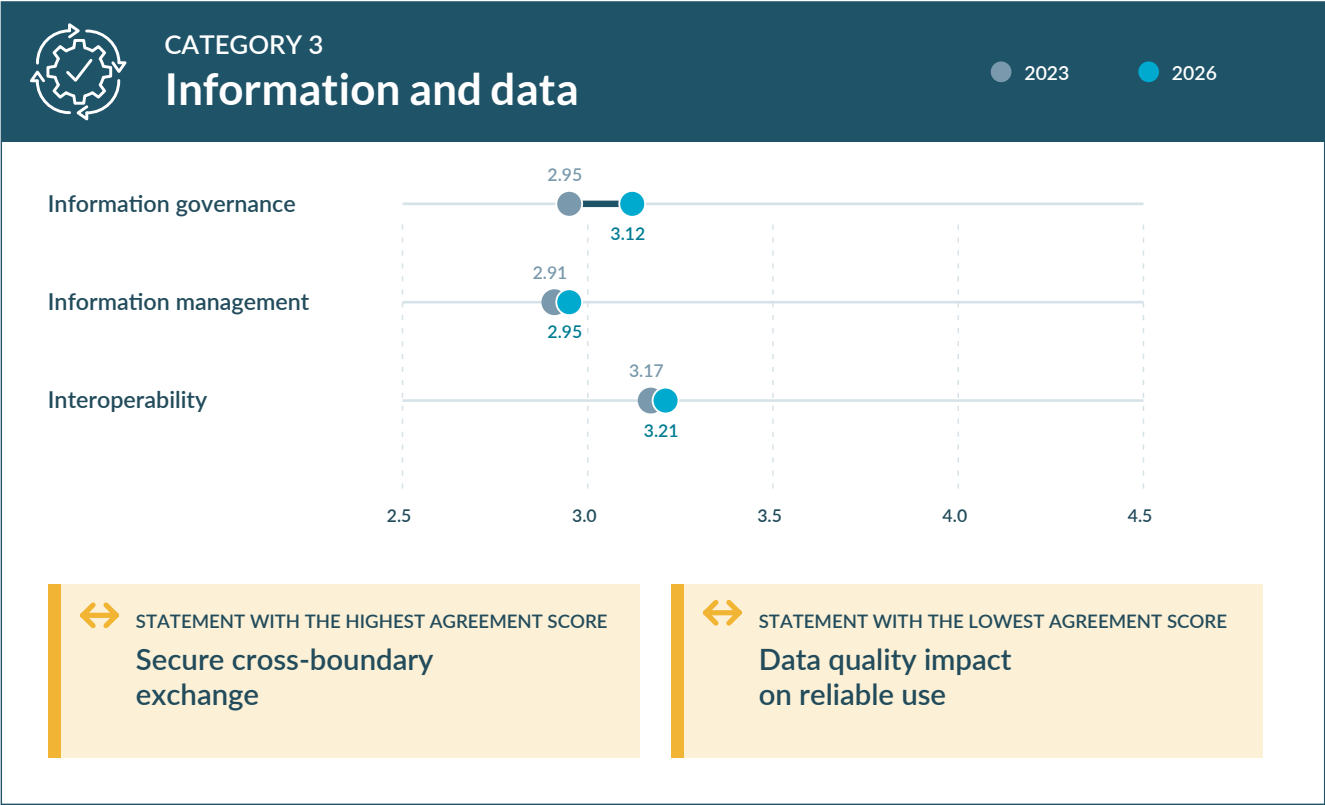
Overall maturity score by category



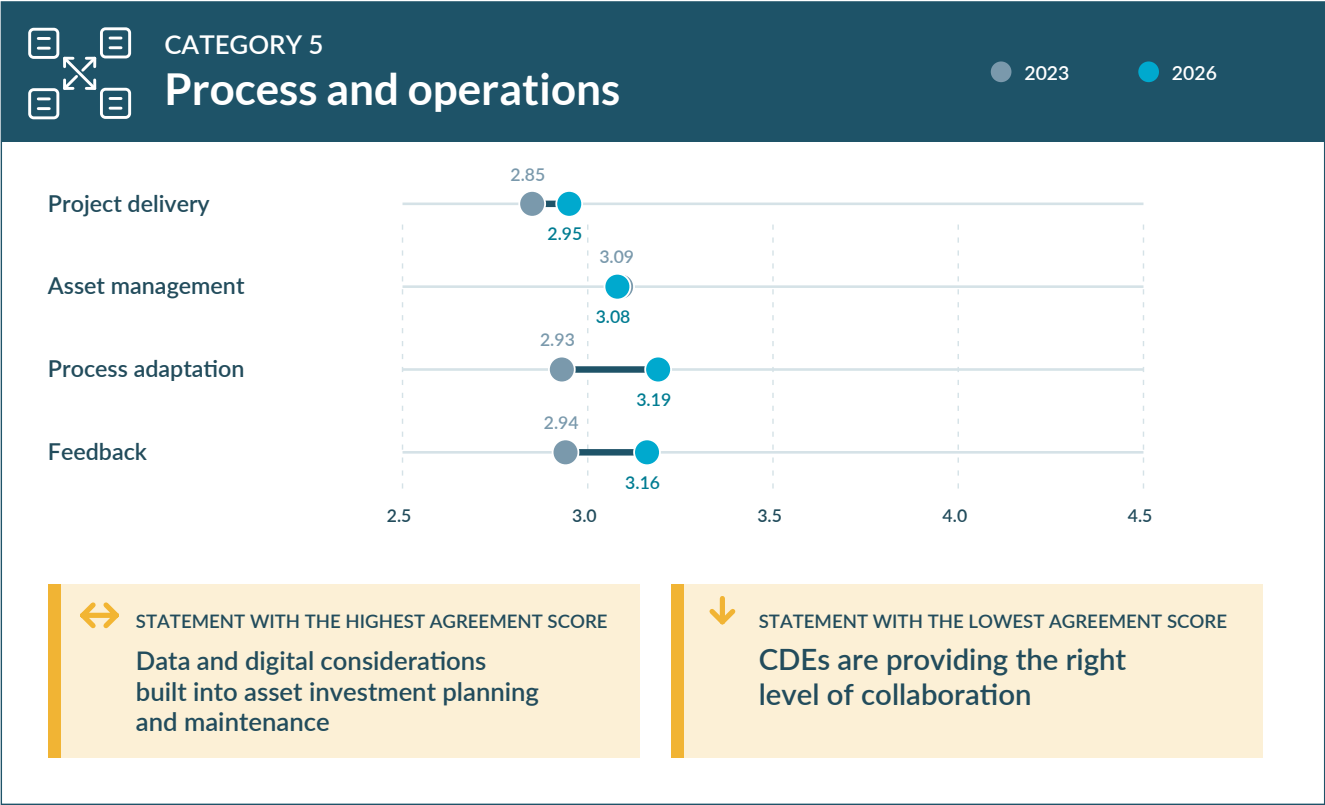
Category highlights including sub-category maturity scores



The report compares the surveys' results using a simple arrow system as follows: ↑ for a net increase in respondents' level of agreement that a given statement applied in their organisations from 2023 to 2026; ↓ for a net decrease; and ↔ for no significant change. A red/amber/green colour code indicates at a glance whether a given change of score should be treated as a concern (red) or welcomed (green).



The report compares the surveys' results using a simple arrow system as follows: ↑ for a net increase in respondents' level of agreement that a given statement applied in their organisations from 2023 to 2026; ↓ for a net decrease; and ↔ for no significant change. A red/amber/green colour code indicates at a glance whether a given change of score should be treated as a concern (red) or welcomed (green).



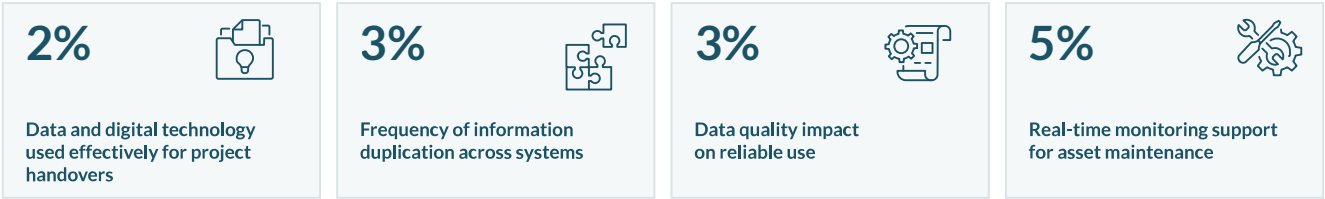
The report compares the surveys' results using a simple arrow system as follows: ↑ for a net increase in respondents' level of agreement that a given statement applied in their organisations from 2023 to 2026; ↓ for a net decrease; and ↔ for no significant change. A red/amber/green colour code indicates at a glance whether a given change of score should be treated as a concern (red) or welcomed (green).

Notable maturity trends

BIGGEST MATURITY GAINS FROM 2023 TO 2026



SMALLEST MATURITY GAINS FROM 2023 TO 2026



Key findings and recommendations

Align data and digital initiatives with what matters most: collaboration, desirable outcomes and long-term value

Chronic underinvestment remains the most significant obstacle facing clients, which means it's vital that digital leaders can express the value of their initiatives in terms of the tangible business benefits they offer. This skill is becoming increasingly important in securing backing for transformation efforts.

Despite ongoing financial constraints, recent collaborations with the supply chain have highlighted a promising way to develop capabilities. By capitalising on such partnerships, clients can foster innovation and unlock value across the industry. As well as enhancing efficiency, this can also help partners to spread best practice, address complex problems and find solutions that benefit all stakeholders.

But a climate of underinvestment often compels clients to present digital initiatives using cases that are most likely to attract funding. As a result, reputation management has remained the main motivator for change in this field since 2023. This can be persuasive in attracting resources when regulatory scrutiny, customer trust and safety are key concerns. Yet the resulting investments typically enable the adoption of minimum standards and governance measures, not digital transformations – as reflected in some of this survey's results.

A digital strategy driven by reputation management risks channelling effort towards areas visible to regulators, auditors and other external observers, instead of those that genuinely enhance operational control, asset performance and long-term planning. As a result, progress lags expectations in areas such as the ability to optimise investments and adapt dynamically to system pressures. The true potential of data and digital technology is therefore being limited in many cases.

Give data and digital capabilities the same priority as health and safety, productivity and carbon management

Despite growing recognition of the importance of data and digital capabilities, the sector has yet to rank these alongside health and safety, productivity and carbon management as integral to infrastructure delivery. This has long-term ramifications for projects and asset management, perpetuating cycles of poor data quality, limited insight and stifled innovation.

The industry can no longer afford to treat data and digital capabilities as an afterthought. Survey results indicate some progress, but the fragmented nature of efforts in this area means that gains have been incremental rather than transformational. The underlying problem is not a lack of tools, but an inconsistent operating model that's shaped by disparate delivery mechanisms, supply chain models and mobilisation practices.

To achieve a decisive improvement, clients must establish a unified, non-negotiable digital delivery baseline and apply this consistently across all projects. In this way, they will embed data and digital capabilities as core elements of strategy and execution.

Raise the analytics ambition to unlock value from safe, shared, scalable data

Incremental improvements in data and information management are the result of neither inadequate governance nor a lack of technical tools. Rather, they reflect the difficulty of consistently translating data into actionable intelligence. For many clients, the adoption of advanced, future-oriented analytics is still at a relatively early stage, which can constrain their ability to fully realise the value of data and prepare for the transformative changes being driven by AI.

Without a shift in ambition towards predictive, AI-enabled analytics, clients risk missing major opportunities to achieve operational excellence and secure a strategic advantage. Wherever data is perceived to have low value and insights are mainly retrospective, there is less incentive to address key issues such as improving data quality, interoperability and the clarity of information requirements. Even where some progress is made, this factor undermines trust in decision-ready data.

By adopting predictive, AI-supported methods, clients can expedite foundational improvements in data quality and interoperability, while establishing robust rules-based frameworks for safe data-sharing. The potential benefits – improved decision-making, risk management and operational agility – make this a worthwhile investment.

Make CDEs and digital twins decision-making platforms, not repositories or visualisations

Recent technological improvements – particularly the widespread adoption of CDEs – suggest that the persistent duplication of information is no longer solely a technical problem. It can also be attributed to weak operating models and data governance.

To move beyond incremental adoption, clients must make cohesive technology choices that address duplication directly. But the complex, siloed structures of these organisations and their supply chains make this especially difficult. A more strategic approach, involving cross-functional collaboration and robust change management, is required to ensure that the technology streamlines information flows and supports strategic objectives.

Using a CDE – intended to serve as a single, authoritative source of information – has become standard practice. However, the ongoing prevalence of duplication across systems suggests underlying weaknesses in how CDEs are procured, configured and managed. Such problems show up even more clearly in many clients' initial applications of digital twin technology. The effective use of CDEs and digital twins is closely tied to the organisation's overall data and information maturity. If data is not readily accessible or insightful to them, teams are likely to keep working in silos with isolated systems, rather than using integrated datasets and intelligent dashboards. Furthermore, wherever digital twins are treated merely as visualisation tools rather than decision-making instruments, progress tends to stall at the pilot phase and they rarely provide all their intended value.

To overcome such barriers, clients must prioritise integrating CDEs and digital twins into decision-making processes and invest in the appropriate supporting culture, commercial models and contractual frameworks.

Design automation to streamline organisation-wide investment, operations and delivery

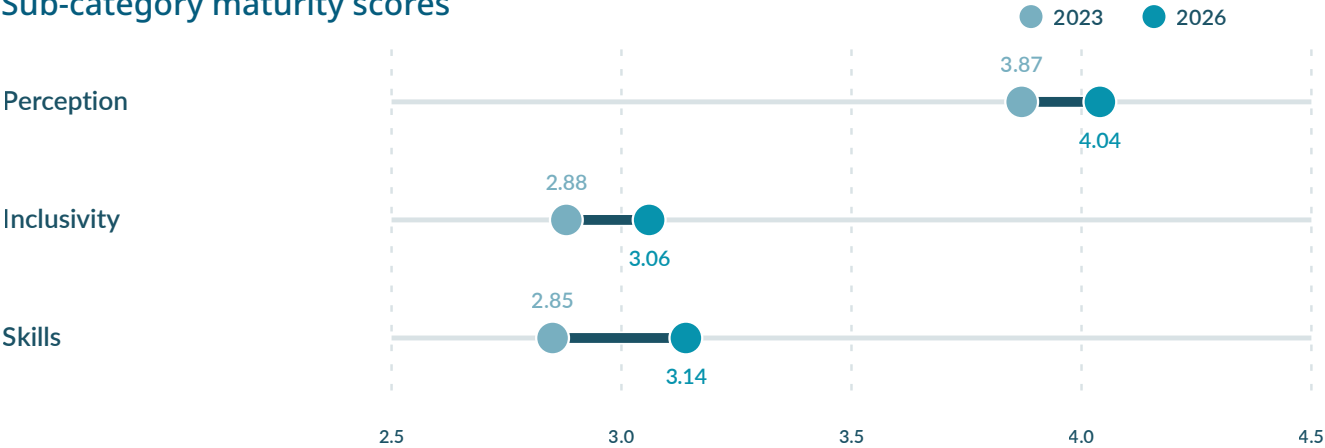
Alongside its relatively limited uptake of analytics tools and digital twins so far, the sector's development of automation capabilities remains at a nascent stage. Although there are ongoing efforts to automate tasks, such initiatives tend to be isolated, making it a challenge to scale up repeatable organisation-wide automation. This means that workload, cost and delivery pressures are still increasing faster than productivity, militating against the potential benefits of automation.

To address the problem, clients should consider establishing automation value streams that prioritise three to five cross-cutting, high-friction processes spanning investment, operations and delivery. By focusing on these, they can achieve meaningful improvements in technology adoption, data management and analytic capability, thereby making themselves more efficient and agile. This approach can enable more effective resource allocation, reduce bottlenecks and set a foundation for continuous improvement in all functions.

CATEGORY 1

People and culture

Sub-category maturity scores



Data and digital initiatives are most effective when everyone they affect feels included, supported and able to participate confidently in change. This year’s results show a clear uplift in inclusion and practical value as more colleagues report that their needs are considered when digital decisions are made.

Perception sub-category: people feel more considered in data and digital decisions, with data and digital tools adding value to their work. There has been a strong uplift in how often people feel that their needs are taken into account by their organisation when it is making digital choices. The results below indicate a meaningful shift towards more inclusive decision-making in this area, albeit not consistently at the highest level.

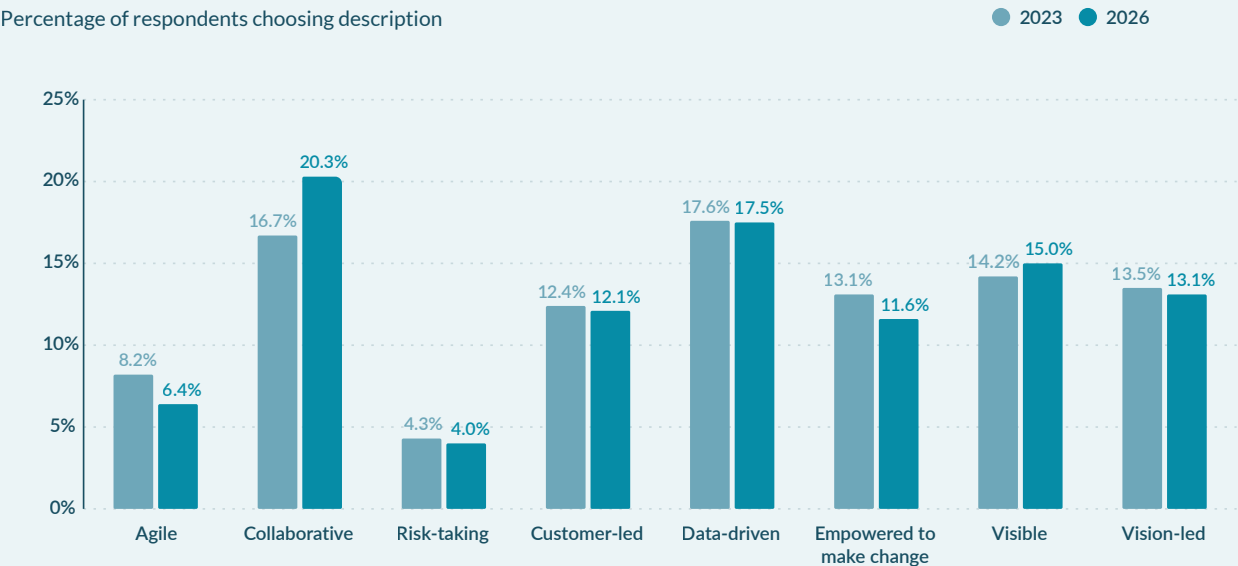
Theme	Often	Always
People’s needs are considered when digital decisions are made	26.7% ↑	3.8% ↔
Data and digital tools add real value to people’s work	31% ↑	44% ↔

In addition, respondents agree more that data and digital tools genuinely enhance people’s work. Most responses fall under “always” and “often”, meaning that three-quarters of colleagues report obtaining regular value from digital tools in their jobs. This distribution signals that organisational investments in digital capability are translating into meaningful, visible benefits across teams.

How do people feel about their digital leaders?

In 2023, “data-driven” was the most popular phrase that respondents chose from a list of qualities to describe their digital leaders. Three years on, there has been a shift: qualities such as “collaborative” and “visible” have increased in popularity by 3.6 and 0.8 percentage points respectively, indicating that leaders have become more accessible and engaged with their teams.

Although attributes including “agile” and “empowered to make change” have become less popular choices, the shift still points to an evolving leadership style that prioritises connection and teamwork. Leaders are becoming more approachable and active in supporting digital initiatives, even as technological change gathers pace and their responsibility for it continues to mature.



Inclusivity sub-category: the language of data and digital technology needs to become more accessible. Only a small percentage of respondents strongly agree that it’s fully clear, while levels of disagreement and neutrality remain significant, showing that many people still struggle to understand tech-speak. While the results point to gradual progress overall, they highlight the need for clearer terminology and communication tailored to varied levels of digital familiarity.

Theme	Strongly agree	Agree	Neutral	Disagree
Accessible language	4% ↔	29% ↑	33% ↑	28% ↓

Skills sub-category: support to develop skills is improving overall, but the picture is mixed. One of the most notable improvements in the survey since 2023 concerns organisations’ understanding of their data and digital skills gaps. Responses suggest that

organisations have got better at identifying gaps but must still translate this improved awareness into more effective recruitment and employee development planning.

Theme	Agree	Disagree
Organisational understanding of skills gaps	35% ↑	27% ↓
Support to develop skills	40% ↔	21% ↓

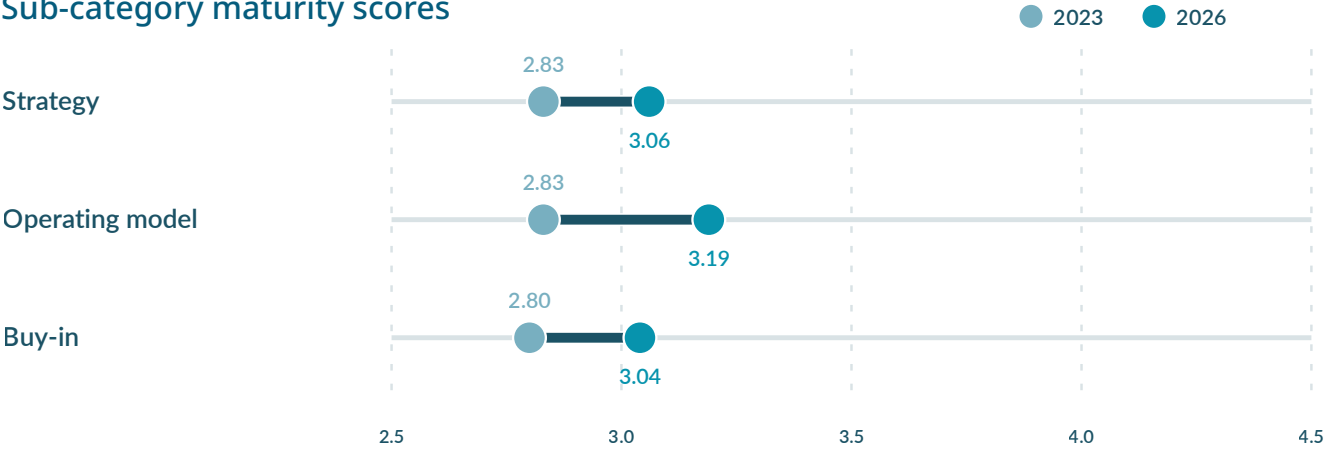
Summary insight

The language surrounding data and digital technology remains hard for a significant minority to understand. While support for enhancing people’s skills in this area is improving, it remains inconsistent. This highlights the need to keep simplifying communications and strengthening development pathways.

CATEGORY 2

Organisation and governance

Sub-category maturity scores



This part of the survey examines how digital strategies, investments and operations are managed to support business goals. The 2026 findings show improved clarity and connection in steering digital change. There is stronger alignment between strategy and delivery, more effective benefits tracking and better supply-chain collaboration. Role clarity and decision structures have advanced and resourcing is steadier than it was in 2023. Despite this, improvements are needed when it comes to communicating digital decisions. A strong focus on reputation management remains, while efficiency and sustainability scores have risen, reflecting a greater emphasis in the sector on operational excellence and environmental responsibility. At the same time, strategic ownership is moving towards formal frameworks with clearer lines of accountability, although some uncertainty remains.

Strategy sub-category: strength and momentum are evident in vision alignment and benefits management. The 2026 results show that organisations have become more confident in their digital direction, with higher levels of agreement that strategic priorities are widely understood. Improved scores on benefits tracking also point to better structured and managed data and digital initiatives. Taken together, these trends indicate a maturing function that’s providing clearer vision and more disciplined delivery.

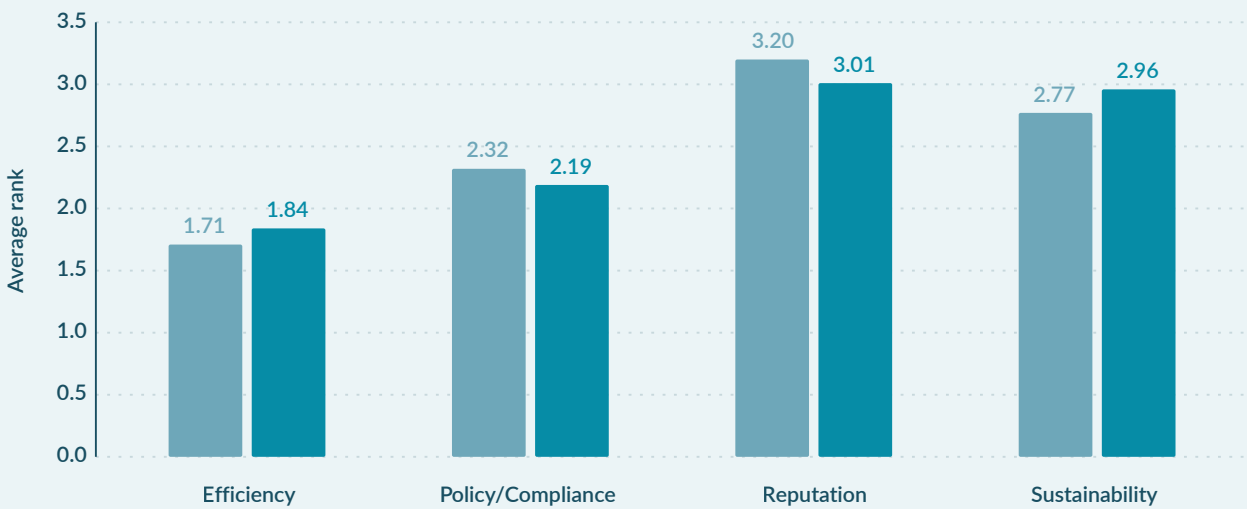
Theme	Agree	Disagree
Vision alignment	42% ↑	11% ↓
Benefits tracking	27% ↑	28% ↓
Decision-making structures	22% ↑	28% ↓

What factors are driving data and digital change?

The strategic value to organisations of reputation management remains the strongest driver of data and digital change, consistently ranking above efficiency, sustainability and policy considerations. The 2026 survey does reveal the growing influence of efficiency and sustainability, which are ranked significantly higher than in previous years. This trend suggests an increasing emphasis on achieving operational excellence and demonstrating environmental responsibility.

Average rank of insights

2023 2026



Operating model and buy-in sub-categories: supply-chain collaboration is increasing, despite scant improvements in investment commitment. This year’s survey suggests that collaborating and co-creating with partners in the supply chain is becoming a regular occurrence for many infrastructure clients. Despite this, there has been a minimal increase in funding committed to such activities. This limited investment may hinder a client’s ability to capitalise on collaborative opportunities, potentially constraining innovation and the long-term value it could create. Without greater financial commitment to partnerships with suppliers, an organisation risks forgoing a potential competitive advantage.

Theme	Often	Always
Effective supply chain collaboration	35% ↑	12% ↑
Right level of committed investment	26% ↔	5% ↔

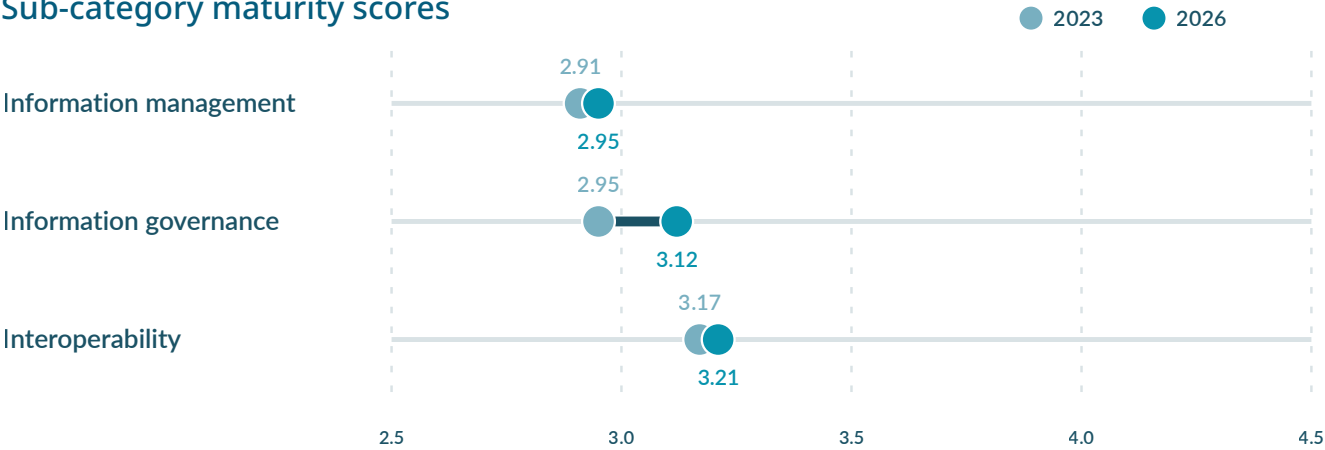
Summary insight

Underinvestment remains the biggest constraint to clients seeking to better position data and digital initiatives as ways to achieve desirable business outcomes. Funding shortfalls are likely to persist, but growing momentum in supply-chain collaboration offers a potential way forward. By making greater use of such relationships, organisations can generate bigger returns on investment and develop innovative solutions for the broader industry.

CATEGORY 3

Information and data

Sub-category maturity scores



This part of the survey examines how information is accessed, trusted, governed and shared, so that the right people have the right insights at the right time to make effective decisions. The 2026 results suggest only modest progress in this category – not because teams don’t care about improving the situation, but because many organisations are still aiming low on intelligence.

The sector’s level of analytics maturity is described as largely descriptive/diagnostic, with predictive capability yet to be widely embedded. The value of data analytics at this level is still only trickling through to users and the perceived return on any investment in better information management remains limited.

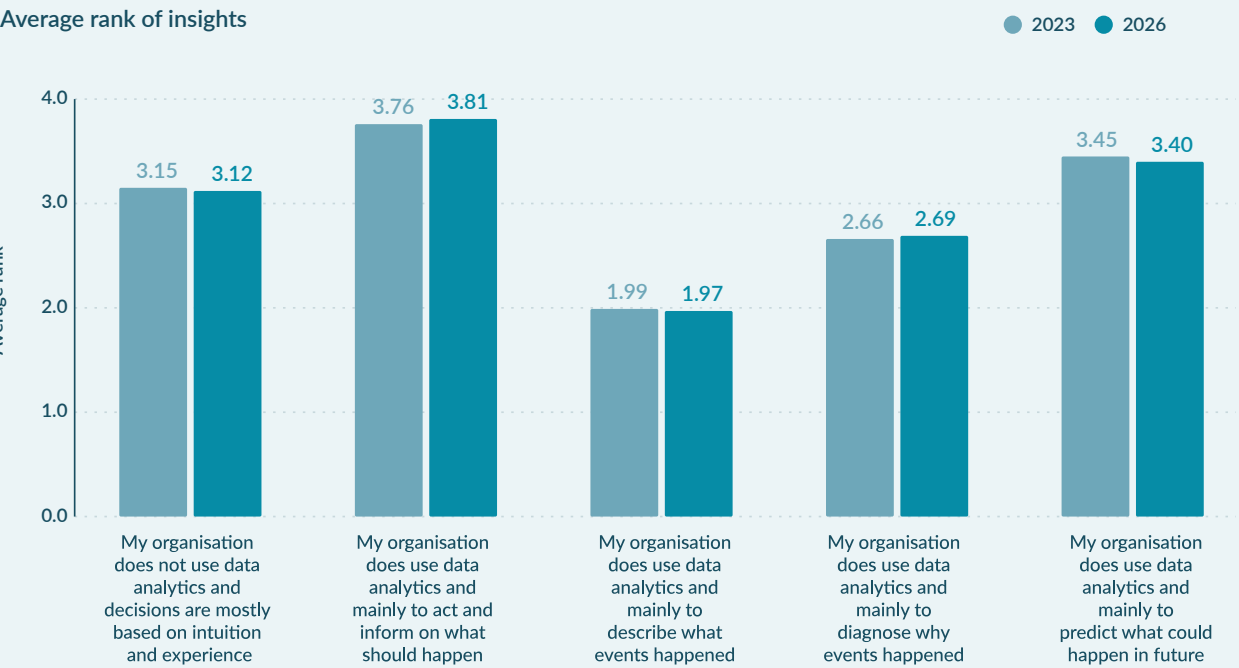
Information management sub-category: only marginal advances are evident.

There has been a small overall improvement in the data and information management sub-category. Three-quarters of respondents report that information requirements are applied at least sometimes in their organisations, for instance. Yet trust issues persist among data users: there has been no material change this year in the percentage reporting that poor data quality often or always limits their ability to use information reliably. Despite minor gains in other aspects of information management, this finding shows that concerns about data quality remain widespread.

Theme	Often	Always
Data quality impact on reliable use	38% ↔	21% ↔
Timely access to decision-ready information	39% ↑	4% ↓

How are organisations using data analytics?

This year’s survey shows that most organisations still lack intelligence maturity, relying on descriptive analytics rather than decision-focused predictive tools. Intuition-led decision-making and basic reporting remain common practice, while adopting advanced future-oriented analytics continues to be a low priority. This lack of readiness to adopt more intelligent systems leaves many organisations unprepared for AI-driven change.



Information governance and interoperability sub-categories: little progress has been achieved. The high percentages of neutral responses across these two sub-categories, alongside limited improvements in aspects such as secure cross-boundary data exchange, suggest a lack of confidence among respondents. Their uncertainty is probably being reinforced by the fast changes evident in the cyber threat landscape. There is a risk that neutrality becomes a proxy for risk aversion. Where there’s a lack of clarity about what is considered acceptable practice, teams tend to do nothing – or, worse, apply unnecessary restrictions on data-sharing and interoperability.

Theme	Agree	Neutral	Disagree
Governing measures and reporting	34% ↑	34% ↑	26% ↓
Right tools to share information	24% ↔	23% ↔	29% ↓
Secure cross-boundary exchange	54% ↔	24% ↔	11% ↑

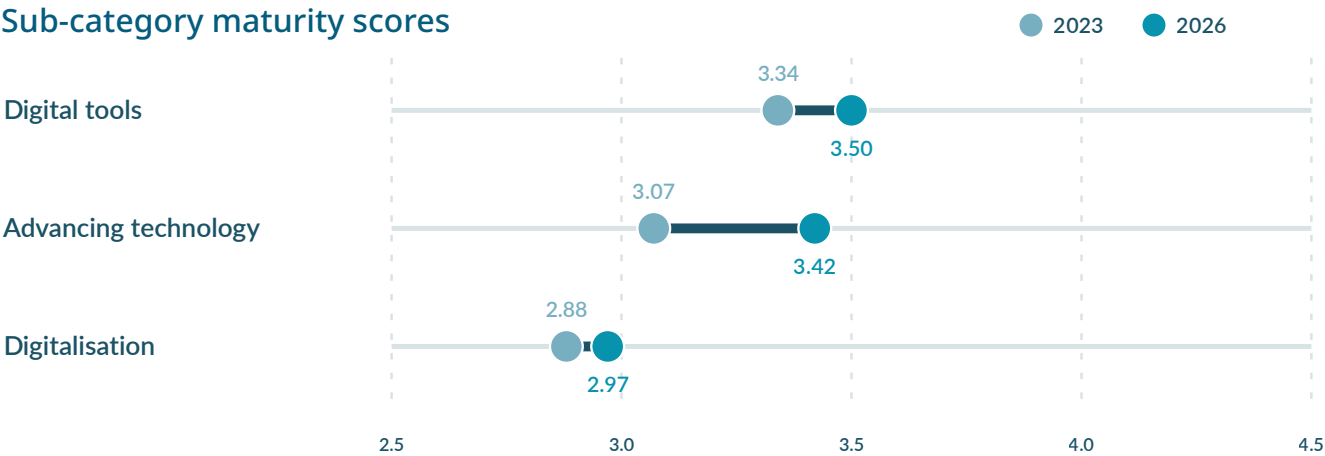
Summary insight

In organisations that attribute little value to their data and use it mainly to explain past performance, the case for fixing basic shortcomings may not feel urgent. This helps to explain why the sector's trust in data and its use in decision-making remains fragile overall, despite some advances.

By raising the analytics ambition and shifting deliberately towards AI supported predictive analytics, organisations will be able to accelerate the foundational work required to improve their data quality. In doing so, they can also create clear rules-based guardrails for safe data-sharing.

CATEGORY 4

Technology and systems



Adopting technology intelligently means staying focused on its intended purpose rather than being driven by trends. Technology is an enabler, not the destination. Most organisations surveyed are advancing in the sub-categories of digitalisation and the use of digital tools, but their progress has been more modest than might reasonably have been expected. While this year’s survey reveals improvements in access and adoption overall, fragmentation persists. This highlights the sector’s need to make more purposeful, joined-up technology choices that will reduce duplication and better align more advanced tools with users’ needs.

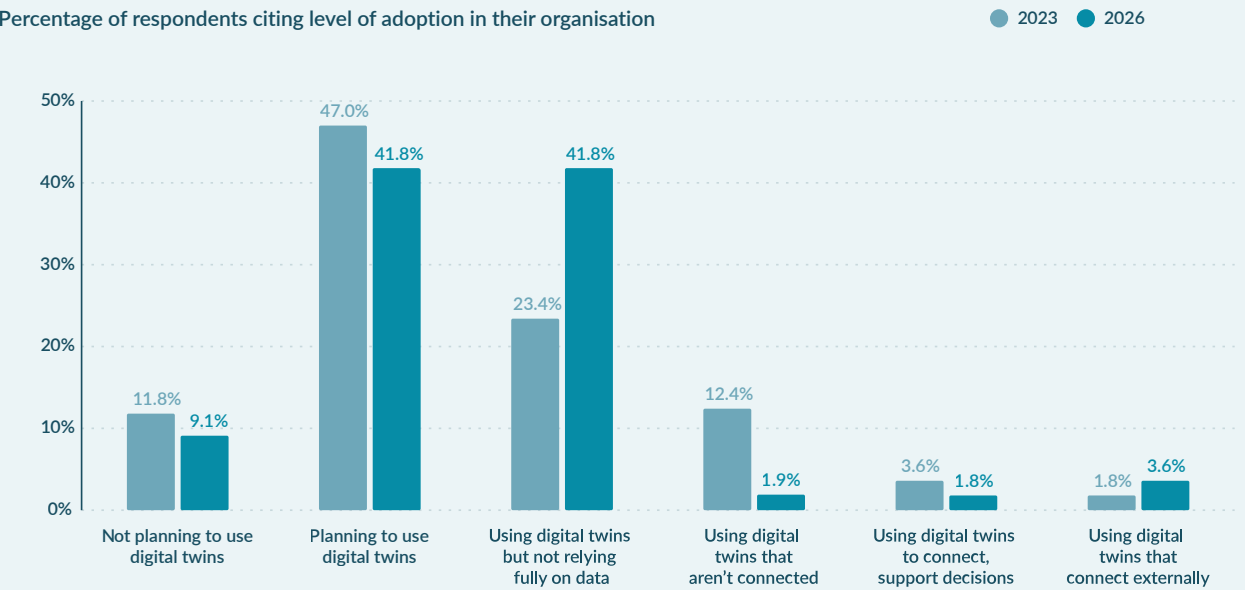
Tool access and suitability: access is improving, but views on suitability remain mixed. This year’s survey reveals a modest improvement in respondents’ ability to obtain and apply suitable tools. But a bigger advance should probably be expected in this sub-category if users are to deliver consistently good results. The duplication of data across systems remains a clear source of friction, which indicates that many organisations are still dealing with legacy estates.

CDEs have been widely adopted in the sector over recent years, primarily to provide users with a single source of information. But the continued prevalence of data duplication suggests that organisations are still facing challenges in CDE procurement, configuration and management.

Theme	Often	Always
Tool accessibility	46% ↑	20% ↔
Tool suitability	40% ↑	5% ↔
Information duplication across systems	53% ↔	14% ↓

How are digital twins being used?

While more organisations are adopting digital twin technology, many have yet to use it with full confidence and consistency. Nearly a quarter of respondents report that their organisations have plans to introduce digital twins but aren't mature enough to execute these yet. The same proportion say they have adopted the technology but don't yet trust it to support decision-making. On the other hand, well over a third of respondents admit that they don't know how their organisations are using digital twins. Overall, this suggests that uncertainty persists about the maturity and appropriate applications of digital twins, despite the increase in their usage.



Advancing technology: awareness is growing, but tangible applications remain limited. Results suggest that many organisations are assessing emerging technologies thoughtfully, gauging their potential use cases and impacts. Although this is an encouraging development, it has yet to translate widely into valued business outcomes.

Theme	Agree	Disagree
Assessment of emerging tech application	48% ↑	11% ↓

Summary insight

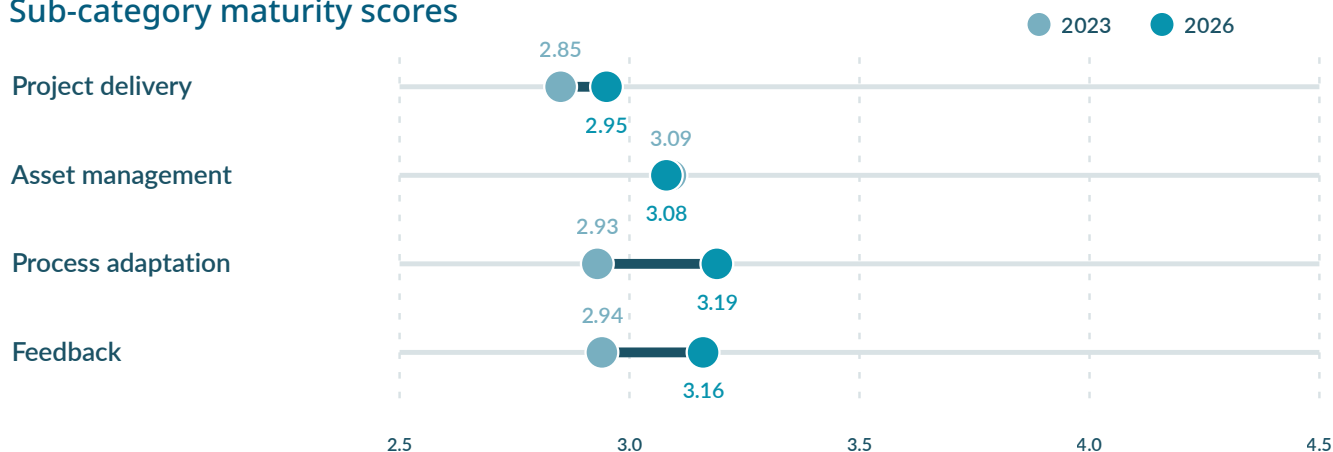
The sector has a strong appetite for digital technology, yet its uptake – particularly of powerful capabilities including predictive decision support – has been limited. This points to weak operating models and a lack of management clarity. Adoption remains largely fragmented, with firms piloting and introducing new tools in isolation.

More joined-up technology choices are therefore required to reduce duplication. Although complex and siloed organisations won't find this easy, they will need to improve their planning and communication about the use of advanced systems such as digital twins if experimentation is to lead to consistent, effective adoption.

CATEGORY 5

Process and operations

Sub-category maturity scores



The value that an organisation obtains from using data and digital tools depends on how well it can integrate these into daily business processes. Achieving such integration is not straightforward for infrastructure clients. This is because the high level of coordination required must extend beyond their internal processes to encompass their regulators and, most significantly, their supply chains.

Project delivery sub-category: a decisive improvement remains elusive, with the survey indicating only modest, uneven gains. The results confirm that the sector's data and digital capabilities are still not consistently applied as a delivery discipline. This is clearest at the start of projects: only 23% of respondents agree that data and digital requirements are defined and prioritised from day one. The lack of early prioritisation is reflected in the marginal reported increase in the use of data and digital tools to improve project handovers. Minimal progress in this area means that the risk of poor asset management outcomes remains high. A similar trend applies to the use of data and digital tools in improving activities such as cost control, project management office (PMO) support and collaboration through CDEs. In each case, the most common response is that this is happening only sometimes in respondents' organisations. So, while good practice clearly exists, its fragmented application is supporting incremental improvements, rather than a step change.

The underlying problem here is an operating model characterised by variable delivery arrangements, supply-chain structures and mobilisation practices. Solving it requires a single, non-negotiable set of digital requirements to be applied routinely across all projects. This digital baseline must be backed by standardised mobilisation, visible PMO support and embedded workflows, so that project teams benefit consistently throughout the delivery process.

Theme	Agree	Neutral	Disagree
Data and digital requirements defined and prioritised at project outset	23% ↑	36% ↔	34% ↔
Adoption of product platform and production techniques	26% ↑	52% ↑	16% ↓

Theme	Always	Often	Sometimes	Rarely
Data and digital tools used for cost estimates and budget control	8% ↔	24% ↑	38% ↔	28% ↔
Data and digital tools used effectively for project handovers	4% ↔	14% ↔	46% ↑	31% ↓
Data and digital tools used to provide better PMO services	4% ↔	25% ↑	47% ↔	22% ↓
CDEs providing the right level of collaboration	3% ↔	23% ↑	38% ↓	32% ↔

Asset management sub-category: data and digital tools are viewed as key enablers, but few organisations are using them consistently to aid lifecycle decision-making.

Responses to this year's survey confirm the increasing incorporation of data and digital considerations into asset management strategy and investment planning since 2023. While this points to the sector's improved grasp of the enabling role of data and digital tools in asset management, that has yet to translate into consistently effective real-time monitoring and decision support.

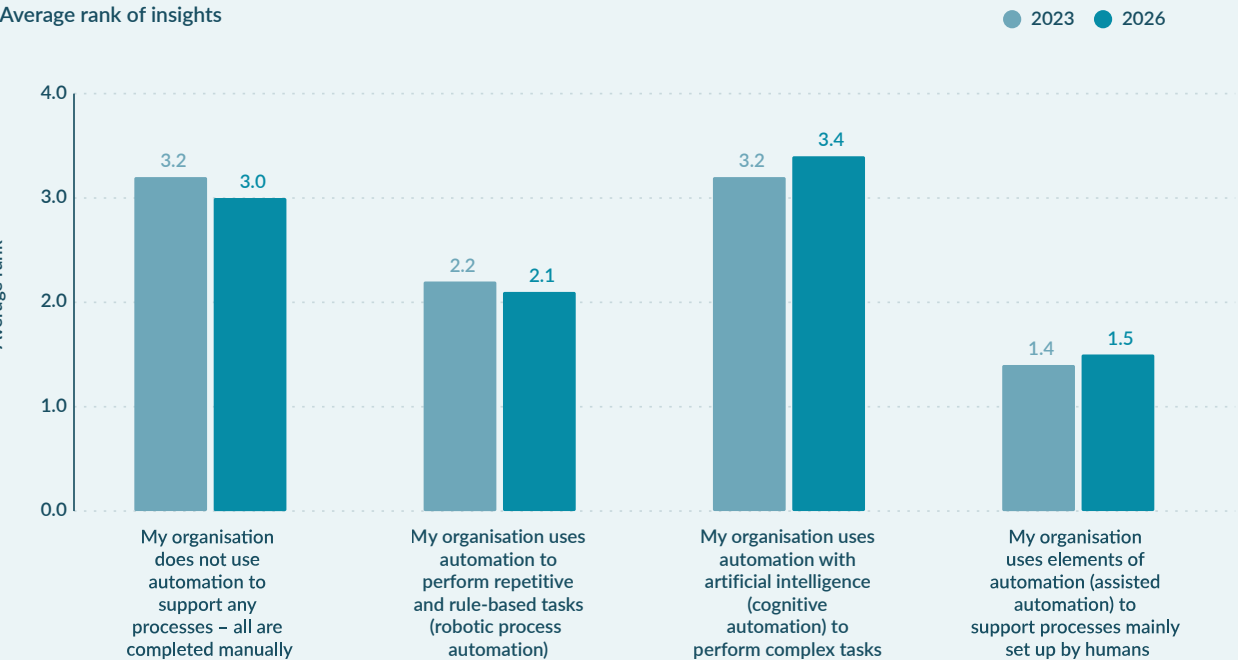
Fragmented execution could again be a key contributing factor. For instance, information flows from project delivery into operations remain weak, with handover data often insufficiently structured, assured or timely to support effective decision-making. At the same time, levels of data literacy vary considerably among teams, many of which lack confidence in using forward-looking analytics. These shortcomings are compounded by the continued prevalence of siloed systems and poorly integrated datasets.

Theme	Agree	Neutral	Disagree
Data and digital considerations built into asset management strategies	25% ↔	47% ↑	19% ↓
Data and digital considerations built into asset investment planning and maintenance	38% ↔	38% ↑	16% ↓

Theme	Always	Often	Sometimes	Rarely
Decision support on asset performance	5% ↔	23% ↔	62% ↑	7.5% ↓
Real-time monitoring support for asset maintenance	6% ↔	18% ↔	56% ↔	15% ↓

How is automation being used?

In essence, most organisations have yet to advance beyond isolated uses of automation. This state of affairs presents a risk, given the increasing expectations being placed on teams to work more efficiently. The survey results suggest that organisations are consolidating small, localised gains rather than scaling up repeatable automation capability. As a result, workload, cost and delivery pressures are set to keep growing faster than productivity. Responses indicate that automation is being applied on a small scale within teams rather than as part of an end-to-end operating model. Organisations would derive greater value from focusing their automation efforts on a few particularly inefficient cross-cutting processes spanning asset investment, delivery and operations.



Process adaptation and feedback sub-categories: cross-organisational initiatives could build on the big isolated gains that have been achieved. This year’s survey reveals advances in areas such as process reviews, continuous improvement and the digitisation of manual data-handling tasks. The results suggest that organisations are getting better at using data and digital tools to streamline operational and administrative work, particularly where processes are easy to control and responsibilities are clear.

Progress towards digital maturity remains more uneven in asset investment and delivery. Complexity, rather than any lack of intent, is the most likely explanation. Investment and delivery activities span several supply chains, contractual boundaries and fragmented stakeholder landscapes, where standards, incentives and decision rights are less well aligned. As a result, practices that work well in stable operational contexts struggle to transfer into

project delivery and capital decision-making. This reinforces a pattern in which data and digital capability enables local efficiencies, but proves harder to scale up in areas requiring higher levels of coordination, governance and shared accountability.

Theme	Always	Often	Sometimes	Rarely
Processes reviewed and adapted to align with data and digital change	3% ↔	28% ↑	47% ↔	20% ↓
Digitalisation of processes to eliminate manual tasks	1% ↔	26% ↑	54% ↔	18% ↓
Commitment to continuous improvement and user feedback	7% ↔	25% ↑	51% ↑	15% ↓

Summary insight

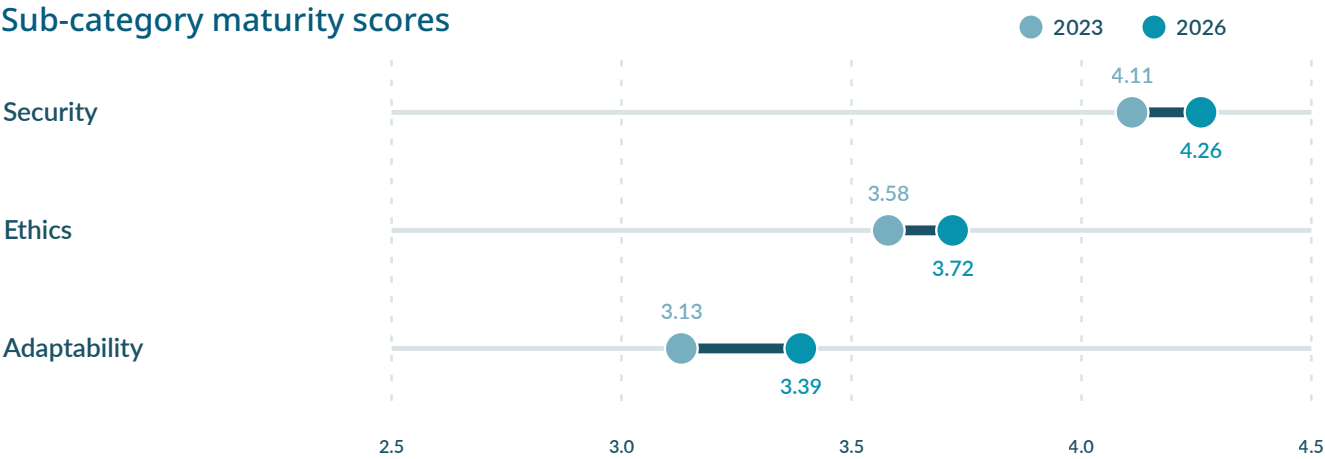
The sector has made advances in digitising and improving internal processes, but progress is more patchy where work spans projects, portfolios and handovers. Survey responses suggest that good digital practice exists in isolated pockets but is yet to be embedded in repeatable operating models.

Organisations should prioritise moving from localised improvements to a single non-negotiable digital delivery baseline covering mobilisation, common data requirements, handover standards and PMO workflows. This should ensure that data and digital capabilities are designed in from the start so that they consistently support better decisions about cost control, collaboration and asset management.

CATEGORY 6

Responsibility and resilience

Sub-category maturity scores



As well as managing internal challenges, clients must also respond effectively to external influences including stakeholder expectations and broader technical and socioeconomic change. To achieve desirable outcomes, they must adopt an ethical, adaptable approach to data and digital practice. In this category, which has consistently outperformed others in past surveys, the 2026 results continue the positive trend.

Adaptability: organisations are responding to change well. This year’s results show that respondents have gained confidence in the adaptability of their digital strategies since 2023. Half now agree that the digital vision of their organisation is responsive to external change.

Theme	Agree	Neutral	Disagree
Digital vision responds to external changes	50% ↑	31% ↔	14% ↔

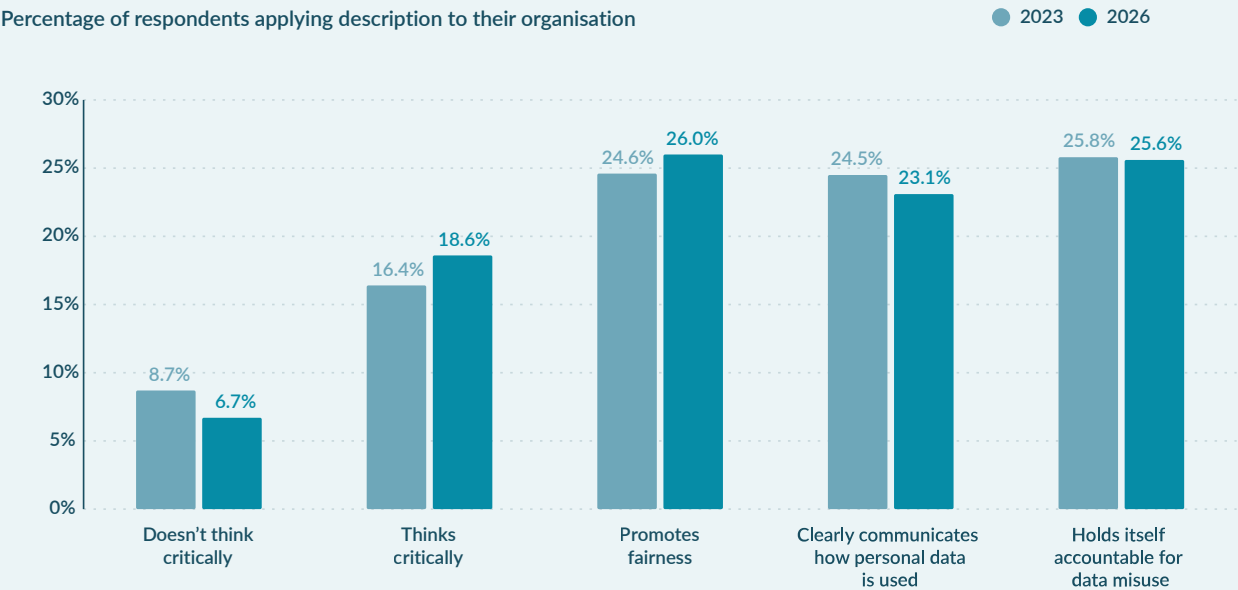
While lesson-sharing among organisations has also improved, the most common response is still that this happens only sometimes. A substantial minority of respondents say they don’t know whether such exchanges of knowledge are taking place, which indicates that the practice occurs only in isolated pockets.

Theme	Always	Often	Sometimes
Sharing lessons with other organisations	9% ↑	29% ↑	48% ↑

Ethics and security-mindedness sub-category: a strong sense of responsibility underpins digital decisions. Ethical and responsible decision-making stands out as the strongest theme.

How are infrastructure clients considering the impacts of their data and digital practices on wider stakeholders?

In 2026, respondents most commonly associate their organisations’ consideration of stakeholder impacts with ensuring fairness in their use of data and accountability for any negative impacts or misuse. This points to a strong intent to apply principled approaches. At the same time, the high proportion of respondents selecting the “not in the ways listed” option suggests that the mechanisms for managing stakeholder impacts are not consistently recognised or experienced in practice.



Confidence in the sector’s ethical conduct has risen, with 82% of respondents reporting that their organisations always or often make responsible digital choices. This concentration of responses at the positive end of the scale suggests broad assurance in the sector that ethical decisions are being made, even though these may not be visible to everyone.

Theme	Always	Often	Sometimes
Ethical and responsible decision-making	40% ↑	42% ↑	14% ↓
Adoption of security-mindedness	46% ↑	36% ↔	16% ↓

Theme	Agree	Neutral	Disagree
Digital divide prevention	38% ↑	36% ↔	20% ↓

Summary insight

Respondents have become more confident since 2023 that their organisations are acting ethically and behaving in security-minded ways. But the results also reveal that learning still often happens in pockets, suggesting inconsistency in how lessons are shared.

The sector should therefore focus on hardwiring responsible measures such as setting clear rules for safe sharing, ethical impact checks and security by design. It should also institutionalise a consistent approach to capturing and disseminating learning, so that responses to emerging risks, stakeholder expectations and external changes can be measured, shared and repeated across the wider ecosystem.

Contributors

Author: Ashleigh Rastall

Reviewers: Mark Enzer, Miranda Sharp, Anna Whitmore

Data provider: Mott MacDonald

ICG manager: Alice Courteney-Harris

Editing: Neil Cole, Michelle Harbi

Design: James McCarthy

Cover image: Shutterstock/Kavic.C

The Infrastructure Client Group (ICG) brings together UK economic infrastructure clients in partnership with government and industry. Its key purpose is to lead the acceleration of improvement and alignment in the delivery and development of UK infrastructure, for the benefit of society, the economy and the environment.

The ICG is sponsored by the Institution of Civil Engineers – the home of infrastructure. It is a professional institution with 95,000 members and over 200 years of history. It qualifies civil and infrastructure engineers, promotes lifelong learning and provides trusted, impartial expert advice to decision-makers. Its vision is a world where infrastructure enables people and planet to thrive. Its global membership designs, builds and maintains trustworthy and sustainable infrastructure.



Institution of Civil Engineers is a
Registered Charity in England and Wales
(no 210252) and Scotland (SC038629).

ICE
One Great George Street
Westminster
London SW1P 3AA
UK
ice.org.uk

For further information
about the ICG, please email
icg@ice.org.uk

Follow the ICG on LinkedIn:
bit.ly/LinkedInICG