Building Automation Control Systems (BACS) Collection Group

Key Europe countries

Project Overview & Participation Guide - March 2025

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ASHB
Association for Smarter Homes & Buildings

ASHB & BSRIA have for the last 5 years operated a collection group for Building Automation and Control Systems (BACS) in North America. The members receive quarterly aggregated data for software, hardware, and controls and a yearly BACS report.

ASHB, in collaboration with BSRIA, would like to offer this service to BACS suppliers in Europe. The data collection will be carried out on a country-by-country basis.

The countries will be selected by the participants and the aim is to have a market coverage sample of at least 65-70% for controllers and software in each of the selected countries.

The suppliers will decide on the template (definitions, scope, and segmentation), sign up for 3 – 5 years, and supply 1 - 2 years of historical data. The aggregated data will be available in Excel and PowerBI every quarter for each of the countries the suppliers sign up for.

Draft Proposal (to be modified based on input from suppliers)

Direct and indirect channel sales of branded products (USD m/EUR m) + OEM sales to suppliers outside the group.

Software applications	Hardware	Controllers
- Supervisory software - Energy efficiency software/BEMS - Building Operational Platform software	- BAS protocol gateways and BAS network routers - BACnet SC hubs	- Building controllers - Room controllers/ "Advanced" thermostats - Field level controllers
- On premise vs cloud based - Sold on License vs SaaS		- Fully field programmable vs application specific - Uptake of IP

3. Geographic coverage & participation

BACS market value (excl. field devices) measured in USD		Example of collection
Germany	26%	x
France	11%	x
UK	8%	x
Italy	7%	x
Netherlands	6%	Other countries in Europe
Scandinavia	9%	
Switzerland	5%	
Spain	3%	
Belgium	2%	
Other Europe	24%	

The European 2024 BACS market is estimated at USD 1.6 bn (including software, hardware, and controllers, but excluding field devices).

The largest market is Germany, accounting for around 26%, followed by France, UK, and Italy. Scandinavia includes Sweden, Norway, Finland, and Denmark.

The participants can decide which countries to include, but a minimum of 4 – 5 suppliers are needed for it to be doable in terms of coverage.

The most obvious countries to include in Europe would be the large markets for BACS, so Germany, France, UK and Italy, which account for a combined share of just over half the European market.

Other markets to consider could be the Netherlands, Switzerland, Spain, and Scandinavia as a region. Countries like Poland, Austria, and others could be included if the group members agree.

We suggest to collect data for 4 – 6 key countries + other European countries (clearly defined geographic scope), so the participants gain detailed information for key countries as well as a European Overview.

The table shows the suppliers of BACS in the key European countries.

6 – 8 suppliers typically account for around 70-80% of the market for controllers and software in most countries. There are several suppliers that have a leading position in 2 – 3 countries.

The suppliers that have a strong position in Europe (in no particular order) are:

- Siemens
- Honeywell
- Sauter
- Schneider Electric
- Johnson Controls
- Kieback & Peter
- Distech

	Ger	France	UK	Italy	Net.	CH	Spain	Scand
Siemens								
Beckhoff								
Delta Controls								
Loytec								
AL Carrier								
Regin, DEOS, and Industrietechnik								
Honeywell								
JCI								
Kieback & Peter								
Priva								
Sauter								
Schneider Electric								
Wago								
Distech								
ABB								
Total	**70%**	**83%**	**85%**	**83%**	**78%**	**78%**	**83%**	**75%**
Hermos								
GFR								
MBS								
Neuberg								
ABB								
Trane								
Coster								
IsmaControlli								
Webeasy								
Fidelix								
Reliable Controls								
others								

Collection Group

- A quarterly collection of top-line numbers*

- Geographic coverage: Key European countries

- Output: aggregated market data (no market shares)

Yearly Publication

- Total market per country

- Forecast and trends

- Installed value (products + other products + labour)

- Verticals (by building type)

- Channels to market

Timeline

- 3 – 5-year contract

- Delivery: 1 - 2 years of historical data at the start

Reporting Format and Meetings

- Quarterly aggregated data based on input from suppliers

- A yearly meeting/call to discuss market size and trends

- Additonal questions/categories can be added over time if members agree. Initially, the consensus is to keep it simple.
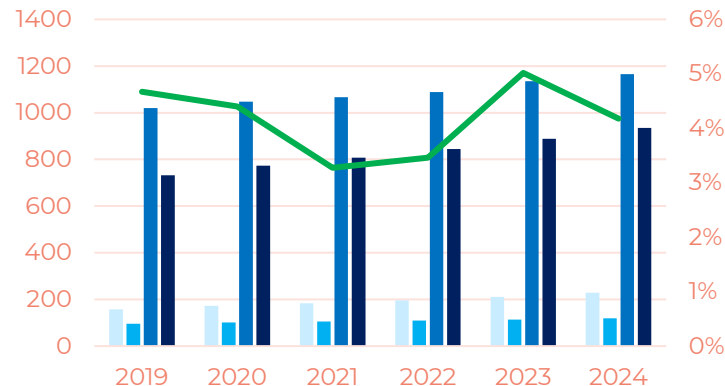
* If a supplier misses the deadline for the collection, BSRIA will estimate based on previous numbers and general trends, so that individual company numbers are not revealed.
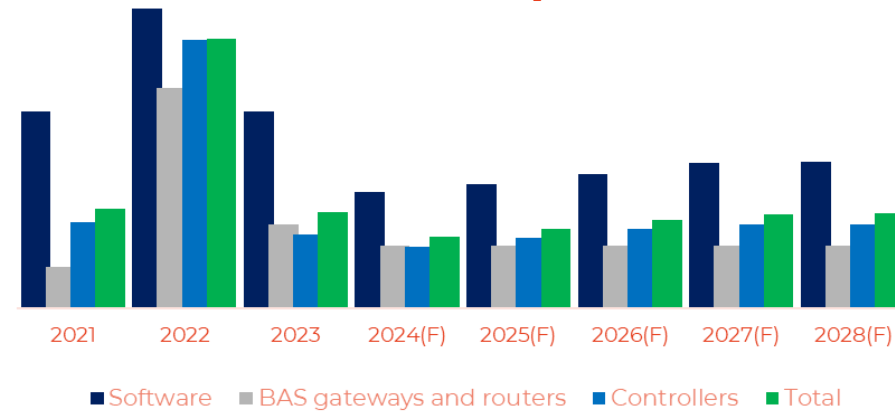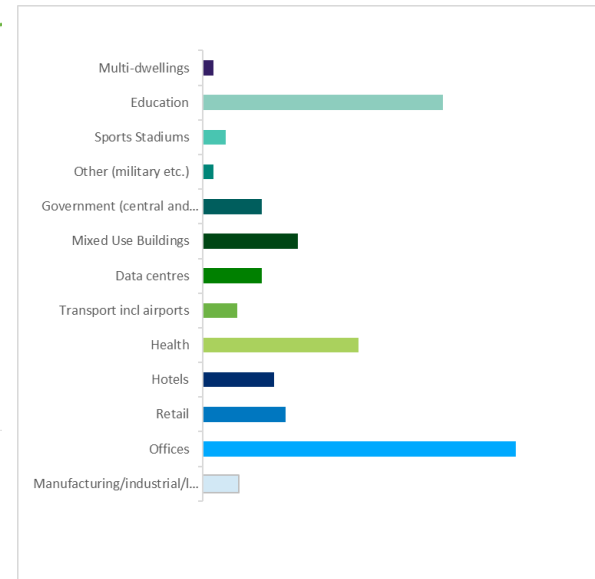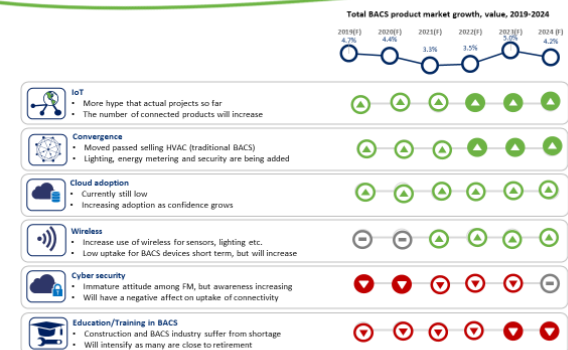
Yearly BACS

- Total market
- 5-year forecast and trends
- Market characteristics
- Channels to market
- Verticals (by building type)
- Installed value (products + other products + labour)

- Includes an opportunity to assess market coverage of the collection group

Example Charts

Timescale

Based on the experience in North America, it takes at least 6 months to get the collection group off the ground.

The members submit data every quarter in

- Mid - January
- Mid – April
- Mid – July
- Mid – October

The aggregated data will be provided 5 - 7 working days later.

The Annual reports will be published:

- April – May (to be decided)

Cost

The cost will be cheaper per country depending on the number of countries selected.

Please note. A market sample representing at least 65% coverage is required before a country will be included

	Overall cost	Cost per country
2 countries	EUR 10,000/USD 10,500	EUR 5,000/USD 5,250
4 countries	EUR 15,000/USD 15,750	EUR 3,750USD 3,938
6 countries	EUR 20,000/USD 21,000	EUR 3,333/USD 3,500

Note 1: USD prices are guide prices depending on the exchange rate
Note 2: other Europe will be part of the deliverables for clients, who sign up for 4 countries or more

About ASHB

The Association for Smarter Homes & Buildings (ASHB) is a leading international, not-for-profit organization promoting advanced technologies in homes and buildings since 1988.

Membership: Nearly 300 member companies, including OEMs, software developers, master integrators, building developers, owners, facility managers, governmental organizations, research organizations, B2B associations, conference producers, and media companies.

Mission: To foster informed thought leadership and collaboration within intelligent built environments, delivering a more livable, sustainable, and efficient connected world.

Vision: Empower connectivity among people, spaces, and technology for a better tomorrow.

Goals:

• Develop relevant, actionable content for members.

• Enhance user experience with an effective content management system.

• Increase awareness of ASHB and intelligent built environments.

• Foster collaboration among industry thought leaders and organizations.

Website: ASHB Governing Principles

Current ASHB/BSRIA Project in Progress:

BACS Market Sizing Study North America

Since 2019, ASHB, in partnership with BSRIA and supported by industry-leading companies, has conducted an annual Building Automation Control Systems (BACS) market sizing study. This project focuses on the North American market, forecasting trends, market channels, installed value, vertical segments, and the adoption of convergence versus stand-alone systems. Additionally, ASHB has a quarterly top-line data collection group to monitor market changes, encompassing software, hardware, and controls.

Website: ASHB BACS Research

About BSRIA

Building Services Research and Intelligence Association (BSRIA) is a non-profit distributing, member-based association promoting knowledge and providing specialist services for construction and building services stakeholders. Our mission is to make buildings better by improving their environmental, operational and occupational values, and we support the industry by providing guidance and solutions.

Website: BSRIA Homepage

9. BSRIA Collection Groups

Group	Frequency	Length of running	Deliverables	Group Coverage
BACS North America	Quarterly	4 years	Aggregated group results	80% BMS controls
Standard Splits	Quarterly	Over 25 years	Aggregated group results	85% +
VRF/VRV	Quarterly	Over 15 years	Aggregated group results	91%+
Chillers HVAC	Biannually	Over 20 years	Aggregated group results + total market figures	70%+ by value
Heat Pumps	Quarterly	Over 10 years	Aggregated group results	79% (A2W) 33% (G2W)
Heat Recovery Ventilators	Quarterly	Over 5 years	Aggregated group results	Approximately 35%
Electric & Mixer showers	Monthly	Mixer: o. 25 years Electric: o. 15 years	Aggregated group results	Electric > 80% Mixer >55%

Controllers

Electric and Mixer Shower Groups

Standard Splits

Chillers

VRF

Heat Recovery Ventilators

Heat Pumps