Reimagining India's real estate landscape

The role of technology in value chain transformation

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Foreword by FICCI

For most of its modern history, value creation in Indian real estate came down to three variables: land, location and the ability to read a market cycle. Technology, where it was used at all, played a peripheral role, supporting marketing, tracking projects, occasionally managing compliance. It sat at the edge of the business but did not shape how assets were conceived, built, sold or governed.

That position has changed, and this report documents the change with rigour and precision.

The scale of the sector makes the stakes clear. India's real estate market, valued at USD650 billion in 2025, is projected to reach USD5.8 trillion by 2047[1]. Over USD16 billion has been unlocked through REITs and InvITs, reflecting a market moving decisively from fragmented private ownership towards institutionally managed, transparent platforms[2]. And in the first quarter of 2026 alone, foreign firms leased a record 9.1 million square feet of office space across India's top nine cities[3]. The demand case needs no embellishment.

What this scale demands, however, is a fundamental rethinking of how real estate actually operates, across the full project lifecycle, from the moment land is identified to the moment an asset is transacted, governed and managed. That is precisely what this report examines, and it is the right frame.

The core argument of the report is one I recognise from the ground. Technology adoption in this sector has, until recently, been front-end and fragmented, visible in sales tools and marketing platforms, largely absent from the decisions that actually determine project outcomes. What is changing now is the depth and the sequence of integration. Building Information Modelling (BIM) and digital twins are addressing the planning failures, incomplete drawings, unresolved clashes, evolving scopes that have historically consumed developer capital long before a single brick is laid. IoT-enabled site monitoring and drone-based progress tracking are bringing execution discipline and real-time visibility to construction sites in ways that manual oversight never achieved reliably. AI-driven valuation models and demand analytics are replacing individual judgment with data that institutional investors can audit.

Blockchain-enabled workflows are beginning to resolve what has long been one of the sector's most persistent structural weaknesses: the opacity and transactional friction that surrounds land records, title certainty and property ownership transfer. The finding in this report that I would ask every reader to pause on is this: AI adoption in India's corporate real estate sector moved from under 5 per cent in 2023 to 91 per cent in 2025[4]. That did not happen gradually. It happened inside two years. It tells us that the sector has already made a collective judgment about where competence must be located. The execution of that judgment remains uneven. This report is honest about the barriers that persist, the fragmented systems, the workforce skill gaps, the high upfront costs and the organisational resistance that constrain adoption at scale. But the direction is not in question.

Equally significant, and I think underappreciated in most sector conversations, is the role the government is playing as a digital enabler rather than simply a regulator. Over 360 million land parcels now carry geo-referenced unique identifiers across 29 states and union territories[5]. Nearly 89 per cent of sub-registrar offices are integrated with revenue systems for real-time record updates[5]. The National Blockchain Framework has verified over 34 crore property documents as of October 2025[6]. The SVAMITVA scheme has issued property cards across 1.86 villages, converting undocumented rural and peri-urban assets into formally recognised, bankable collateral[7]. These are not incremental administrative reforms. They are the shared digital foundations on which a genuinely investment-ready real estate ecosystem is being constructed, and the private sector must now build on them with the same seriousness of purpose.

For those of us who build, own and operate real assets across commercial, mixed-use and living environments, and who are accountable to institutional partners with long-duration investment horizons, the implications are direct and non-negotiable.

1.Indian Real Estate Industry, IBEF, November 2025
2.Infrastructure Financing in India: Trends, Institutions, and Innovations, PIB, 18 March 2026
3. Foreign firms lease record 9.1 million square feet of office space in January-March to set up GCCs in India: CBRE, IBEF, 07 April 2026
4. India's AI Revolution in Corporate Real Estate, JLL, 25 February 2026
5. Year- End Review 2025: Department of Land Resources, PIB, 1 January 2026
6. National Blockchain Framework, PIB, 24 October 2025
7. Property cards issued under the SVAMITVA scheme, PIB, 03 February 2026

The transparency of our data architecture, the intelligence embedded in our execution systems across the project lifecycle and the rigour of our governance frameworks are now as consequential to how institutional capital evaluates a platform as the quality of the underlying assets themselves.

Technology has ceased to be a point of differentiation. It is a condition of access to capital and a condition of trust.

FICCI-KPMG report titled “Reimagining India’s Real Estate Landscape: The role of technology in value chain transformation” is a serious and evidence-based contribution to a conversation the sector needs to have with greater urgency. For policymakers, it maps precisely where regulatory clarity and digital public infrastructure can accelerate private investment at the scale India's urban growth demands. For institutional investors, it provides a framework for distinguishing platforms where technology is operationally embedded across the value chain from those where it remains an aspiration stated in an investment deck. For developers and asset managers, it is a clear account of what enterprise-wide transformation, as opposed to project-level experimentation, actually requires.

India's real estate sector has earned its place as one of the most consequential growth stories in the world. Our task now is to build the digital discipline that sustains and scales that position. I invite you to read this report not as a catalogue of emerging tools, but as a precise map of the choices that will define the sector's next generation of leaders.

Raj Menda

Chairman, FICCI Committee on Urban Development and Real Estate & Chairman, Supervisory Board, RMZ

Foreword by KPMG in India

India's real estate sector stands at a pivotal inflection point, defined not merely by its scale and economic relevance, but by the structural shifts reshaping how value is generated, captured and sustained. As one of the largest contributors to employment generation, capital formation and urban development, the sector's demonstrated resilience continues to reinforce strong growth prospects, with the potential to scale beyond USD5 trillion by 2047. With the country advancing towards the Viksit Bharat 2047 vision, real estate is emerging as a critical catalyst for growth, productivity and job creation, underpinned by a progressively enabling policy framework, expanding digital penetration and deepening participation from institutional and capital markets.

Building on this context, the report "Reimagining India's real estate landscape: The role of technology in value chain transformation" assesses the impact of accelerating digital adoption across the sector's value chain, from design and construction to sales, transactions and asset management. It outlines the industry's evolution from fragmented, manual practices to integrated, technology-led platforms that strengthen decision-making and improve capital efficiency, supporting a transparent and resilient real estate ecosystem.

In this evolving operating environment, technology is increasingly central to the development and construction lifecycle. Advanced digital capabilities such as geographic information systems (GIS), building information modelling (BIM), digital twins and internet of things (IoT) are improving planning precision, cost and schedule discipline, quality control and real-time performance oversight. As projects scale in size and complexity, technology-driven transparency is gradually becoming integral to delivery certainty, investor confidence and sustained institutional participation.

Extending further along the value chain, digitisation is redefining sales, customer engagement and transaction execution. Technologies such as immersive visualisation, artificial intelligence (AI)-enabled demand insights and secure digital workflows are enhancing customer experience while strengthening compliance and operational efficiency. At the same time, emerging investment structures, including fractional ownership and asset tokenisation indicate a systemic evolution in capital access, with the potential to widen investor participation and improve market liquidity over time.

Equally crucial is the role of the government as a digital catalyst with targeted initiatives modernising land and registration systems, strengthening title certainty, reducing disputes and lowering structural risk. Together, such reforms are positioning real estate as a key pillar of India's digital public infrastructure, aligning public systems with the requirements of a more institutional, technology-driven market.

Despite continued progress, growth continues to be influenced by factors such as upfront cost intensity, system fragmentation, workforce capability gaps and cybersecurity considerations. Addressing these could require sustained focus on integrating digital tools into core operations, strengthening skills and governance frameworks and improving interoperability across public and private platforms.

The next phase of growth is expected to depend on moving beyond isolated digitisation towards end to end, enterprise-led transformation. A digitally integrated real estate ecosystem, built on trust, transparency and execution certainty, has the potential to accelerate delivery, mitigate risk and enable sustainable value creation. In this context, the report, thus, seeks to equip industry leaders, policymakers and investors with actionable insights to navigate this transition and help shape the future trajectory of India's real estate sector.

Neeraj Bansal

Partner and Head – India Global
KPMG in India

Executive summary

The domestic real estate sector is entering a period of transformation, with technology increasingly shaping how assets are developed, marketed and transacted. Virtual engagement, data-led insights and platform-based models are reshaping interactions between developers, investors and buyers, while strengthening access and process efficiency. As real estate remains a critical contributor to employment and capital formation across the economy, this evolution reflects a broader shift towards more structured, transparent and scalable operating approaches.

Real estate as a pillar of India's growth

7.3%
Contribution to India's gross domestic product (GDP), underlining the sector's central role in economic development

USD5.8 tn
Projected market size by 2047, reflecting continued urbanisation and infrastructure investment

USD15.8 bn
Institutional investment unlocked through capital markets, highlighting growing liquidity creation

Drivers shaping the digital evolution of Indian real estate

- Rising project scale encourage greater use of digital execution tools
- Enhanced governance frameworks support digitised compliance management
- Growing institutional participation reinforces the need for transparency through digitisation
- Informed buyers driving wider adoption of digital engagement tools
- Complex, multi-phase projects increase reliance on connected digital systems

As real estate projects grow in scale and complexity, technology adoption and governance are shifting from front-end visibility towards end-to-end lifecycle integration across planning, execution and sales.

1. Land identification and feasibility

Use of geographic information systems (GIS), spatial analytics and digital land records support site assessment, ownership verification and informed demand and pricing feasibility analysis

2. Planning and design

Building information modelling (BIM), digital twins and AI-supported analysis could enable coordinated design development, performance simulation and improved readiness for downstream construction execution

3. Construction and execution

Integrated platforms, drone-based monitoring and IoT-enabled tools support real-time visibility, schedule coordination, cost management and site quality assurance

Note: Sources for the data indicated here are provided in the subsequent sections

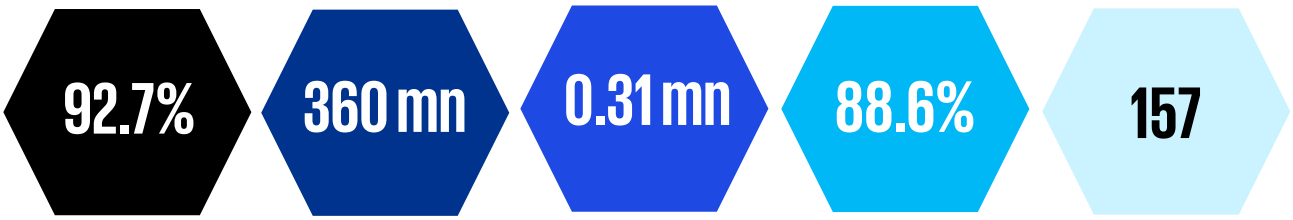
4. Sales and customer engagement

Virtual visualisation tools, customer relationship management (CRM) platforms and AI-enabled interactions support structured buyer engagement, responsiveness and consistency across the sales lifecycle

5. Transactions, governance and compliance

Secure digital workflows, escrow-linked fund tracking and automated reporting support transparency, auditability and alignment with regulatory and investor requirements.

Government-led digital reforms shaping real estate sector



Villages with computerised Records of Rights under the DILRMP

Land parcels assigned geo-referenced ULPINs nation-wide

Drone-based surveys completed

Sub-registrar offices integrated with revenue systems under the NGDRS

Digital land surveys initiated or completed across urban areas through NAKSHA

DILRMP: Digital India Land Records Modernisation Programme, **ULPIN:** Unique Land Parcel Identification Number, **NGDRS:** National Generic Document Registration System, **NAKSHA:** National Geospatial Knowledge-based Land Survey of Urban Habitations

From adoption barriers to execution focus

Key adoption constraints

- High upfront technology investment requirements
- Fragmented systems limiting interoperability and scale
- Lack of skilled project workforce
- Organisational resistance to adopting digital workflows
- Data security and cybersecurity risk considerations.

Priority areas for action

- Embed digital tools into core workflows
- Enable ecosystem-level platform interoperability
- Build skilled digital capabilities across project teams
- Strengthen organisational change and adoption management
- Implement robust data security and governance.

India's real estate sector is shifting towards more structured, digitally enabled models, driven by government platforms and market-led technology adoption. These changes are improving transparency, coordination and execution certainty, supporting stronger institutional participation and sustainable growth.

Note: Sources for the data indicated here are provided in the subsequent sections

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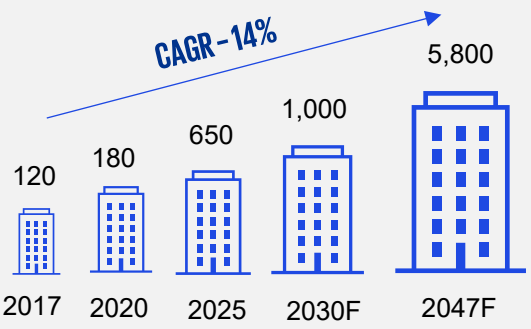
1. Real estate sector: An overview

Over the past decade, India's real estate sector has emerged as a key enabler of urbanisation, infrastructure development and capital formation. Spanning residential, commercial, retail, industrial and logistics segments, the sector reflects the country's rapid urban expansion, shifting demographics and rising consumption aspirations. Its macroeconomic significance is underscored by its contribution of nearly 7.3 per cent to India's GDP as of November 2025 and its position as the country's second-largest employment generator, supporting livelihoods across construction, allied industries and services[1]. With deep linkages to financial markets, urban infrastructure and asset formation, real estate continues to play a systemic role in shaping India's long-term economic growth trajectory.

India's real estate market size (USD bn)[1]



F: Forecasted

USD906 bn
projected value of new homes by 2034[2]

41 mn sq. ft
of new retail developments expected to be operational by 2028[1]

USD15.8 bn
Unlocked through asset monetisation via InvITs and REITs[3]

USD10.5 bn
Allocated to Urban Challenge Fund in union budget FY26[4]

InvITs: Infrastructure Investment Trusts, **REIT:** Real Estate Investment Trust

Demand-led growth drivers

Rapid urbanisation

An estimated ~590 mn people (39 per cent of the population) are expected to live in urban areas by 2036, driving sustained demand for affordable housing[2].

Rising public capital expenditure

A sixfold increase in government capex to a budgeted USD128.5 bn in FY27 is strengthening the infrastructure backbone and supporting sustained growth[3].

Institutional investment support

An institutional investment of USD4.3 bn as of October 2025 and growing REIT adoption are enhancing transparency and liquidity across commercial and residential real estate[1].

Monetary policy easing

The RBI's 25 bps reduction in repo rate in December 2025, to 5.25 per cent, has lowered borrowing costs, improved EMI affordability and supported end-user housing demand[5].

GCC-led rental upside

The expansion of GCCs to ~1,700 in 2025 is driving office space demand, supporting rental appreciation and accelerating the development of new business districts in India[6].

Bps: Basis points, **EMI:** Equated monthly installment, **GCC:** Global capability centre

1. Indian Real Estate Industry, IBEF, November 2025
2. Real Estate, Invest India, 24 April 2026
3. Infrastructure Financing in India: Trends, Institutions, and Innovations, PIB, 18 March 2026
4. Cabinet approves Rs. One Lakh Crore Urban Challenge Fund to Drive Market-Led Urban Transformation, PIB, 14 February 2026
5. Monetary Policy Report, Reserve Bank of India, April 2026
6. From Policy to Prosperity: GCCs Leading India's Growth Journey, PIB, 11 December 2025

Currency converted according to exchange rate USD1 = INR94.9 as of 30 April 2026

Market split by asset class

Residential market[7]

Housing demand is projected to reach 93 mn units by 2036, driven by a strategic shift towards higher value realisation, led primarily by growing buyer preference for high-end, luxury and ultra-luxury housing segments.

Industrial market[8]

The industrial and warehousing sector witnessed strong activity in 1HCY25, with overall leasing reaching 20 mn sq. ft. Demand was largely driven by third-party logistics (3PL) providers, followed by the engineering and automobile sectors, with continued support from e-commerce.

Commercial market[9]

Foreign firms leased a record 9.1 mn sq. ft. of office space in the top nine cities during 1QCY26, driven by REIT expansion, rising GCC activity and greater use of flexible workplaces.

Retail market[10]

In CY25, retail leasing activity across major cities amounted to nearly 8.9 mn sq. ft., supported by demand from fashion and apparel brands, direct-to-consumer (D2C) players and food and beverage operators.

A shift in real estate value creation

Historically, value creation in Indian real estate was largely a function of land acquisition, location advantage and timing within the economic cycle. Competitive differentiation was driven by access to capital, regulatory navigation and the ability to hold or exit assets advantageously. Technology, where adopted, played a largely peripheral role, supporting marketing or project management rather than shaping outcomes.

As the market matures and becomes more institutionalised, these traditional sources of advantage are proving insufficient on their own. Rising asset sizes, extended holding periods and more discerning occupiers and greater investor scrutiny are shifting the focus from asset creation to asset optimisation. Value creation is increasingly driven by strong execution and delivery capabilities, differentiated products and disciplined asset management, with technology acting as a key enabler, enhancing operational efficiency, real-time visibility, customer experience and lifecycle asset performance, among others.

How is technology creating value for real estate stakeholders?

- Improves transparency and data availability across transactions, pricing, occupancy and asset performance
- Enhances operational efficiency by automating processes, reducing manual intervention and minimising cost leakages
- Enables real-time visibility and informed decision-making through data-driven monitoring and analytics
- Streamlines asset performance across the lifecycle, from development and leasing to operations and exit
- Strengthens customer and occupier experience through digital engagement, personalisation and faster issue resolution.

7. Real Estate, Invest India, 24 April 2026
8. Industrial & warehousing demand at all-time high, 20 million sq. ft. in H1 2025, IBEF, 18 July 2025
9. Foreign firms lease record 9.1 million square feet of office space in January-March to set up GCCs in India: CBRE, IBEF, 07 April 2026
10. India retail leasing hits record 8.9 million sq. ft in 2025 on strong demand, fresh supply, IBEF, 29 January 2026

2.
The growing role of technology in real estate

Building on the shift towards technology-enabled value creation, India's real estate sector is experiencing a structural change in the way projects are planned, executed, sold and governed. Long characterised by fragmented workflows, paper-based processes and limited visibility across stakeholders, the sector is now increasingly adopting digital and data-driven tools across the value chain.

Technology is emerging as a core operating layer underpinning the entire real estate value chain, spanning site selection, design, construction delivery, sales and asset management. Digital platforms are beginning to connect activities that were previously fragmented, enabling more coordinated decision-making across development stages and stakeholders.

This transformation is being driven by structural pressures that are reshaping how real estate projects are developed and managed. Rising cost pressures, tighter regulatory oversight, increasing buyer expectations and heightened demands for transparency are accelerating digital adoption. These forces are pushing developers to move away from manual, reactive processes towards scalable, proactive digital solutions.

Key drivers for technology adoption in the sector

Cost efficiency imperative

- Escalating input costs, especially land, materials and labour, are compressing developer margins across the sector
- Against this backdrop, technology adoption is increasingly critical to offset cost pressures by driving efficiency and improving project outcomes
- Digital tools that improve planning accuracy, reduce rework and provide real-time visibility enable tighter cost control, faster decision-making and stronger margin protection.

Enhanced regulatory and compliance expectations

- Real Estate (Regulation and Development) Act (RERA) has significantly increased compliance, reporting and disclosure obligations for real estate developers
- Requirements around quarterly project updates, escrow-linked fund utilisation, construction progress documentation and buyer communication have significantly increased compliance complexity
- Reliance on manual processes heightens operational risk and penalty exposure, driving the shift towards ERP-led digital systems to embed compliance and improve project governance.

Rising institutional capital participation

- Growing institutional participation, particularly from private equity funds, REITs and alternative investment funds (AIFs), has raised expectations around transparency, governance and data accessibility in the sector
- Institutional investors increasingly seek real-time financial visibility and standardised reporting as part of their investment and monitoring frameworks
- These expectations are driving the adoption of technology-enabled platforms, with digitisation increasingly functioning as a prerequisite for building trust and securing sustained access.

More informed and engaged homebuyers

- Homebuyers today are more informed, research-oriented and transparency-focused, actively verifying project details, approvals, timelines and builder credentials before making purchase decisions
- With easy access to online information, expectations around clear communication on project timelines and regular construction progress updates have risen sharply
- As buyer trust increasingly hinges on transparency and clarity, developers are increasingly turning to digital tools for communication and engagement.

As these dynamics reshape developer priorities, the impact of digital adoption is becoming more apparent in how real estate operations are organised and managed over time. This reflects a gradual but meaningful shift in operating approach across the lifecycle of projects.

Embedding technology across core real estate functions by industry stakeholders

Value chain stage	Use cases	Adoption level	Key barriers
Land identification and feasibility	• GIS and spatial analytics • Forecast demand and price fluctuations • Digital land records		• Inconsistent land records • Litigation risk
Planning and design	• BIM-led design coordination • Digital twins for performance monitoring and simulation • AI-powered layout simulation and space utilisation		• Low BIM mandate enforcement • Limited availability of digitised project data
Construction and execution	• Construction management platforms for schedule and cost control • Real-time progress tracking using drones • Safety compliance monitoring		• Uneven data capture from on-site teams
Sales and customer engagement	• Virtual property tours using AR/VR • CRM-driven lead management • AI-driven chatbots for customer interaction		• Resistance from traditional broker networks
Property transactions	• Blockchain for secure transactions • Smart contracts for automating agreements		• Stamp duty complexity • State-specific registration rules
Governance and compliance	• Quarterly disclosures and compliance tracking • Escrow-linked fund utilisation and audit trails • Automated construction progress reporting		• Non-uniform digital reporting requirements across states

AR: Augmented reality, **VR:** Virtual reality

The above table is a representation of KPMG in India's analysis based on technology adoption across the real estate value chain

3. Digitising development, construction and asset enablement

As technology becomes deeply embedded across the real estate value chain, its most transformative impact is being felt in development and construction, the stage where design decisions, execution discipline and risk management ultimately lock in project timelines, cost certainty and investor confidence. Digitisation is now reshaping this engine by embedding intelligence and visibility across planning and execution.

Design-led planning, feasibility and execution intelligence

Real estate execution outcomes are often determined long before construction begins. In the Indian context, many of the delays, cost escalations and coordination failures that surface on site have their roots in the planning and feasibility stage, where early decisions are frequently made on the basis of static designs, fragmented inputs and limited execution intelligence.

Planning delays are often driven by incomplete drawings, unclear specifications or evolving scopes, which prevent effective scheduling and disrupt construction readiness. These gaps typically result in delayed project starts, inefficient resource deployment and increased cost and cash-flow pressures.

A. BIM-led construction planning and control

- BIM is a digital process that creates an intelligent building model containing architectural, structural and MEP data to plan, coordinate and execute construction more accurately and efficiently
- These platforms centralise construction planning and control, enabling teams to align schedules, coordinate subcontractors, track material flow and manage quality across sites
- This improves coordination and execution discipline, helping contractors to manage operational risk as project complexity increases.

MEP: Mechanical, electrical and plumbing

Design approaches compared: Traditional methods vs BIM-led models

Aspect	Traditional design approach	BIM-led design approach
Design and development methodology	Typically discipline-wise and sequential discipline-wise drawings	Single coordination development model
Project lifecycle coverage	Confined to the design phase	Seamless workflows extending from design into facility management
Information consistency and accuracy	Greater likelihood of inconsistencies in manually prepared drawings	Model-based coordination enabling real-time updates and automated clash detection
Rework and execution efficiency	High rework costs due to errors	Reduced rework and faster approvals through automation

The shift to BIM-led design fundamentally improves execution readiness by reducing uncertainty before construction begins. This upfront clarity reduces friction during construction and strengthens confidence in delivery commitments.

B. Digital twins: Real-time intelligence across planning and execution

A digital twin is a real-time virtual model of a physical asset that uses sensor and data inputs to simulate conditions, predict outcomes and identify issues before they emerge during construction.

Design simulation and feasibility testing: Digital twins enable detailed 3D simulation of architectural plans before physical work begins, allowing teams to validate performance assumptions early, strengthen feasibility assessments and reduce late-stage rework.

Real-time project monitoring: By creating a constantly updated virtual replica of the site, digital twins allow developers to track construction progress, identify emerging delays and intervene proactively to maintain delivery predictability.

Sustainability-driven design optimisation: Digital twins help detect energy wastage, pinpoint potential water leakages and improve heating and cooling systems, enhancing resource efficiency, lowering carbon emissions and supporting broader sustainability goals.

In high-complexity developments, ranging from multi-storey residential projects to IT parks, hospitals and major commercial hubs, the presence of multiple interconnected systems makes manual monitoring inefficient and increases operational risk. Digital twins address this challenge by offering a unified, data-rich digital environment that integrates key building systems, enabling more accurate insights, predictive management and smarter, evidence-based operational decisions.

C. AI for future ready development

AI is rapidly becoming integral to real estate development, enabling predictive feasibility, design refinement, space-planning optimisation, cost visibility and operational efficiency. Developers adopting AI-driven planning and decision systems are able to respond more quickly, reduce inefficiencies and manage projects with greater certainty. Increasingly, competitive differentiation in real estate hinges on how effectively organisations embed AI as a strategic capability across the development lifecycle.

AI in space planning: Scale, efficiency and compliance

- **Scaling layout optimisation across large developments:** In large-scale township and plotted developments, AI enables simultaneous generation and evaluation of layouts, improving consistency and significantly reducing design cycle times
- **Enhancing space efficiency in affordable housing:** AI-driven space planning identifies efficiency gains within compact unit footprints, helping enhance liveable space while maintaining functionality, critical for achieving affordability targets without compromising design quality
- **Accelerating regulatory alignment and approvals:** By embedding regulatory parameters into early-stage layouts, AI supports proactive compliance checks, reducing downstream revisions and shortening regulatory review timelines.

D. Integrated construction management platforms

A cloud-based construction management platform that brings together data, workflows and teams across multiple phases of the project from initial design to operations. By consolidating information in one place, it reduces rework, improves coordination and enables real-time oversight.

Case study: Digital transformation in real estate delivery

A leading Indian real estate developer transformed its construction value chain through an integrated digital approach to address gaps in project delivery.

Challenges faced before digitisation

- Fragmented coordination among design teams and contractors resulted in delays and multiple conflicting document versions
- Drawings and records stored across multiple locations made it difficult to find the latest versions, reducing overall productivity
- Limited on-site visibility and inconsistent documentation hindered timely identification and resolution of issues
- Communication gaps caused by delayed or isolated updates adversely impacted project timelines.

Digital transformation approach

- Implemented a connected project environment starting with process mapping and digitising quick-win workflows.
- Enabled scale through capability building, system integrations and real-time dashboards.

Impact and outcomes

- Full digitisation of site execution workflows, enabling zero-paper project sites.
- Enabled time-based progress visualisation by linking asset data with automated dashboards.
- Faster decisions and improved coordination.

On-site execution visibility and controls

While design-led intelligence strengthens early-stage planning, the true test of predictability lies in execution discipline on the construction site. Advancements in technology are introducing continuous, data-enabled visibility into daily on-site operations.

A. Drone-led progress tracking and site oversight: Use cases

Construction monitoring

- Real-time visibility into construction progress by capturing aerial footage, creating visual timelines and providing geotagged imagery to track milestones and detect delays early
- This enables stronger coordination across teams and supports earlier identification of on-site issues, improving overall execution control and quality oversight.

Quality assurance

- Strengthen construction quality control and site safety by using AI-based analysis and thermal sensing to identify structural vulnerabilities, safety hazards and electrical or insulation issues at an early stage
- This enables preventive action, reduces reliance on high-risk manual inspections and minimises post-completion rectifications.

B. IoT-enabled asset tracking and site equipment management

- IoT enables real-time tracking and monitoring of construction assets and equipment across project sites, providing developers with continuous visibility into asset location and usage
- This data supports stronger inventory control, improved equipment utilisation and preventive maintenance, helping reduce losses
- By aligning equipment data with construction schedules, developers can strengthen execution control and improve overall site reliability by supporting consistent operational performance.

Real-time risk, performance and investment monitoring

As real estate development in India is increasingly shaped by institutional and structured capital, developers and capital providers are placing greater emphasis on continuous visibility into execution risk, financial performance and investment outcomes. Reflecting this requirement, real-time risk monitoring platforms that integrate construction progress and financial metrics have been introduced, positioning such tools as a means to support more timely assessment of project performance against approved business plans.

Performance monitoring

Tracks real-time comparison of actual cost and construction outcomes against approved plans.

Capital risk assessment

Provides visibility into capital deployment and investment performance across projects.

Building operations visibility and efficiency management

Connected sensors and digital automation are enhancing real-time visibility into how buildings function across their operational lifecycle. IoT-driven insights allow facility teams to detect issues early, minimise disruptions, streamline maintenance schedules and improve energy performance, strengthening overall operational efficiency and reducing long-term management costs.

IoT-driven applications in modern buildings

Energy efficiency

- Smart thermostats, lighting and HVAC systems dynamically adjust settings based on occupancy, significantly enabling effective energy management
- The approach delivers lower utility costs, aligns with broader sustainability goals and enhances appeal among eco-conscious buyers.

Predictive maintenance

- IoT shifts building maintenance from reactive repairs to predictive interventions by monitoring critical systems such as HVAC and plumbing systems
- Early fault detection minimises unplanned downtime and repair expenses, while increasing the operational longevity of building assets.

Smart surveillance and security

- IoT-enabled surveillance systems use motion sensors and connected cameras to provide continuous, real-time visibility across properties
- Automated alerts and centralised security controls enhance safety, enable remote oversight and strengthen asset protection.

HVAC: Heating, ventilation and air conditioning

4. Transforming sales, customer experience and transactions

As technology strengthens control and predictability across development and construction, its impact is increasingly extending into how real estate assets are presented, sold and transacted. Digital technologies are fundamentally reshaping how properties are discovered, evaluated and transacted across the real estate value chain.

The sales process is shifting from largely physical, relationship-driven interactions to more structured, transparent and experience-led engagement models. Enhanced visualisation and digital interfaces are allowing developers to engage customers much earlier in the development lifecycle, enabling clearer communication of design intent, amenities and value propositions even before physical assets are ready.

Simultaneously, digitally enabled transaction workflows are enhancing coordination among buyers, financiers and regulators, improving transparency, strengthening compliance and reducing execution risk. Collectively, these shifts are elevating customer experience and redefining sales and transaction effectiveness.

A. Immersive customer engagement and product visualisation

Virtual reality (VR) and augmented reality (AR) tools such as immersive walkthroughs are reshaping how projects are presented and communicated across the development lifecycle. By enabling detailed, remote visualisation of assets, these technologies allow stakeholders to experience spaces well before completion, improving clarity and alignment at early stages.

VR/AR enabled offerings in real estate:

- Virtual property tours
- Architectural and interior design previews
- Virtual staging and customisation
- Off-plan and pre-construction visualisation
- Virtual sample-home experiences
- Township and amenity visualisation

Strategic value of immersive visualisation

Reduced need for physical site visits and mock-ups:

High-quality virtual models reduce reliance on physical site visits, mock-ups and sample units, streamlining project communication while helping ensure consistent representation of design intent and specifications.

Better visual clarity for faster coordination and approvals:

Advanced visualisation clarifies layouts, finishes and spatial quality, enabling smoother coordination, faster approvals and early detection of design or constructability risks.

Remote showcases expanding stakeholder reach:

Remote project showcases enable engagement with outstation and international stakeholders, allowing marketing and outreach to scale independent of location or project stage.

B. AI-led valuation, demand intelligence and customer engagement

Globally, the application of AI in real estate is expanding with broader integration across the sector. AI-led valuation, demand intelligence and customer engagement tools are increasingly used, enabling more accurate property pricing by analysing transaction history, location attributes, supply-demand dynamics and real-time market signals. By reducing reliance on subjective judgement, these capabilities improve pricing discipline, sharpen demand forecasting and enable personalised, data-driven customer interactions, creating a critical competitive advantage across the real estate value chain.

AI-enabled offerings in real estate:

- Valuation and pricing
- Customer engagement and sales enablement
- Asset and portfolio management
- Demand intelligence and market analytics
- Marketing and go-to-market optimisation
- Risk, compliance and fraud detection

Illustrative use cases of AI-led intelligence

Predictive demand forecasting and project planning:
Advanced analytics forecast absorption rates and buyer preferences at a micro-market level, enabling informed decisions on project phasing, inventory configuration, pricing strategy and launch sequencing.

Enhanced capital allocation and risk management:
Scenario testing across pricing, demand and market cycles strengthens capital allocation, land acquisition decisions and assumption stress-testing across planning and execution.

More efficient and personalised customer engagement:
AI-driven chatbots and engagement platforms automate and personalise interactions, improving lead qualification, response times and CRM effectiveness while reducing operational and sales execution costs.

C. Trusted transaction execution, ownership traceability and compliance :

Blockchain-enabled transaction workflows represent a structural improvement to how real estate transactions are executed, recorded and governed. By enabling secure, tamper-proof records and smart contract-driven automation, blockchain has the potential to significantly reduce transactional friction, improve transparency and mitigate legal and operational risks across the sales and post-sales lifecycle.

Blockchain enabled offerings in real estate:

- Property record management
- Digitisation of sale and lease transactions
- Fractional ownership structures
- Smart contracts-based payments
- Asset tokenisation
- Compliance and due-diligence records

Key areas of application

Secure and transparent transaction execution:

Blockchain-based ledgers create a single, immutable source of truth for contracts, approvals and transaction records, reducing information asymmetry and strengthening trust across buyers, sellers, lenders and project partners.

Smart contract-enabled payment and settlement automation:

Rule-based smart contracts automatically trigger milestone-linked payments and settlements once predefined conditions are met, improving cash-flow certainty, lowering manual intervention and reducing settlement delays and disputes.

Digitised title management and ownership traceability:

Blockchain-enabled title records and transfer workflows simplify ownership verification and asset transfers, shortening transaction cycles while improving compliance, auditability and fraud prevention.

Fractional ownership and asset tokenisation in real estate

Fractional ownership and asset tokenisation mark a fundamental shift in the way real estate assets are accessed, financed and traded. Enabled by blockchain technology, asset tokenisation involves digitally represented ownership rights in a property as blockchain-based tokens. Further, these tokens can be divided and distributed among multiple investors. On the other hand, fractional ownership lowers traditional entry barriers to real estate investing by allowing individuals to invest smaller ticket sizes, rather than purchasing entire properties.

This democratises access to high-value commercial and premium residential assets that were earlier limited to institutional investors or high-net-worth individuals. For developers and asset owners, it expands the investor base and provides an alternative capital-raising mechanism beyond conventional debt and equity financing.

Features	Fractional ownership	Real estate tokenisation
Technology	Digital platform-based	Blockchain-based
Ownership model	Shares in property entity	Digital blockchain tokens
Liquidity	Moderate	Potentially higher in the future
Regulation	More established	Still evolving
Investor access	Mostly domestic	Potentially global

How does real estate tokenisation work?

Off-chain formalisation

- Property is identified, valued and legally reviewed
- Ownership structure (SPV/trust) is set up to define rights
- Commercial terms on cash flows, governance, exits and taxes are finalised.

Tokenisation

- Asset rights are split into fractional digital tokens linked to the legal entity
- Smart contracts are developed to govern issuance, transfers, payouts and compliance
- Tokens are issued on-chain to enable transparent, auditable ownership.

Primary offering

- Tokens are offered to investors via a compliant issuance platform
- Investors complete KYC/AML and subscribe using fiat or digital payments
- Proceeds are used to acquire, develop, or refinance the property.

Secondary offering

- Tokens are listed on approved secondary trading platforms after regulatory lock-ins
- Investors trade fractions peer-to-peer without selling the underlying property
- Smart contracts automate settlement, compliance and improve liquidity.

SPV: Special purpose vehicle, **KYC:** Know your customer, **AML:** Anti-money laundering

5. Government as digital enabler

Technology adoption in real estate is increasingly shaped by private sector innovation, complemented by the government's role in creating a supportive operating environment. As the sector expands in scale, complexity and institutional participation, the transition from traditional paper-based public systems to digitally-enabled platforms support predictable execution, coordinated decision-making and large-scale investment. Government-led digitisation therefore plays a critical role in modernising the shared foundations on which real estate activity depends.

Real estate as the next frontier for digital public infrastructure (DPI)

Areas such as payments, personal identity, commerce and mobility have benefited from DPI, reducing friction and building trust. As real estate continues to attract institutional capital and more complex transactions, similar shared digital systems across the sector could position it as the next major beneficiary of India's DPI-led approach.

Key government-led frameworks enabling technology adoption at scale

Recognising that real estate markets depend on trusted records, enforceable transactions and interoperable public systems, the government has undertaken a coordinated set of reforms. These initiatives span land records, urban and rural surveys, registration reforms and digital identifiers. They illustrate how technology adoption is being embedded into the core administrative and legal foundations of India's real estate system.

1. Digital India Land Records Modernisation Programme (DILRMP)

- Converted land records from fragmented paperwork into a reliable public system-of-record, enabling faster transactions, lower disputes and lender confidence
- Near-universal digitisation achieved, with ~97.3 per cent of villages having computerised records-of rights and ~97.1 per cent cadastral map coverage, linking ownership data at national scale[1].

A. Unique Land Parcel Identification Number (ULPIN)

- Established a unique digital identity for land parcels, reducing duplication, opaque ownership risks and due-diligence complexity
- Over 360 mn land parcels assigned a geo-referenced ULPIN across 29 states and union territories (UTs), creating a nationally consistent parcel-level identifier[1].

1. Year- End Review 2025: Department of Land Resources, PIB, 1 January 2026

B. National Geospatial Knowledge-based Land Survey of Urban Habitations (NAKSHA)

- Enabled redevelopment-ready urban land markets by resolving boundary ambiguities and improving spatial accuracy in cities
- Completed or initiated land surveys across 157 urban local bodies, with aerial mapping covering ~5,915 sq. km. and ground truthing completed across 21 cities[1].

C. National Generic Document Registration System (NGDRS)

- Streamlined property transactions by standardising registration processes and enabling automatic post-registration mutation
- Implemented across 17 states/UTs, with nearly 89 per cent of sub-registrar offices integrated with revenue systems for real-time record updates[1].

Illustrative case: Legal recognition of digitally issued land and property records

Supported by DILRMP, an Indian state has extended formal legal recognition to digitally issued land and property records. The initiative forms part of a broader urban land records modernisation effort, supported through central funding and state level implementation.

Core features of the online platform

- Digitisation of legacy land records combined with city-level spatial surveys
- Geo-referenced parcel mapping using aerial imagery and GPS-enabled technique
- Records published through an official digital portal and designated city survey systems
- Digitally downloaded records embedded with unique verification identifiers and QR codes

Impact on land administration

- Improves transparency and reduces scope for fictitious or duplicate transaction
- Reduces verification timelines for sales, lending and due diligence
- Enhances investor and lender confidence in urban land records
- Streamlines record storage and retrieval across multiple departments and authorities

GPS: Global positioning system, **QR:** Quick response

Outcome achieved: Digitally issued records are now regarded as a legally trusted system of record, creating a foundation for advanced registry systems, underscoring the commitment towards ease of business, transparency and speed.

1. Year- End Review 2025: Department of Land Resources, PIB, 1 January 2026

2. Survey of Villages Abadi and Mapping with Improvised Technology in Village Areas (SVAMITVA)

- Expanded the formal real estate base by converting undocumented rural and peri-urban properties into legally recognised, bankable assets
- As of April 2025, completed drone-based surveys in over 0.32 mn villages, with 24.2 mn property cards issued across 160,000+ villages[2].

Several states have digitised legacy documents, mapped survey numbers and launched online portals. Digitised records support streamlined land transactions, strengthen investor confidence, accelerate project completion and contribute to a more conducive environment for both domestic and foreign investment.

Beyond registration: Secure digital land registries

Traditionally, land registries have relied on established record systems, creating scope for greater efficiency, modernisation and strengthened governance. Blockchain technology responds to this need by offering a modern approach that supports transparency, trust and timely processing across the land registration process.

Value creation through blockchain-enabled land registries

Creates immutable ownership records, strengthening title certainty, auditability and long-term trust in property transactions

Reduces litigation and disputes, preventing duplicate sales, fraudulent transfers and ownership ambiguities before registration

Establishes a single source of truth, aligning land records across agencies, lenders, courts and market participants

Improves access to credit and investment, enabling faster due diligence, asset bankability and increased institutional participation

Enhances transparency and accountability, limiting manipulation and reinforcing confidence in land administration systems.

Under the National Blockchain Framework, a property management system has verified over 340 mn property documents as of October 2025[3], allowing stakeholders to verify ownership, rights and liabilities, thereby substantially reducing litigation and expediting dispute resolution. Along with private stakeholders, judicial bodies are increasingly endorsing the use of secure, tamper-proof technologies such as blockchain in property transactions, underscoring its relevance as necessary technology upgrade rather than experimental tools.

Digital land registries are also laying the groundwork for tokenisation of real estate assets. By representing ownership rights digitally, properties could be fractionalised, enabling partial ownership, improved liquidity and broader investor participation across India's real estate.

2. Building a Self-Reliant India - 5 Years of SVAMITVA Scheme, PIB, 23 April 2025

3. National Blockchain Framework, PIB, 24 October 2025

6. Inspirations from leading global practices

Government-led digitisation is strengthening trust across land, approval and regulatory systems. The focus is now on execution, using these digital foundations to enable predictable supply, steady capital flows and timely delivery. Global real estate models reinforce that technology creates more value when integrated across planning, regulation, financing and construction. These models could guide India in deploying technology to support disciplined and confident real estate growth.

Overview of structural enablers across leading global technology-led real estate markets

Regulatory clarity through digitalisation

- Online regulatory permissions, escrow mechanisms and electronic documentation streamline approvals
- Compliance is embedded at the transaction level, enabling real-time validation.

Impact: Regulatory exposure becomes more stable and does not escalate with portfolio growth

Technology-enabled long-term urban planning

- Digitised land-use offer long-range visibility on zoning, density and development phasing
- Early-stage feasibility assessments prior to land purchase, support informed capital decisions.

Impact: Developers operate with enhanced pipeline visibility, supporting sustained portfolio execution

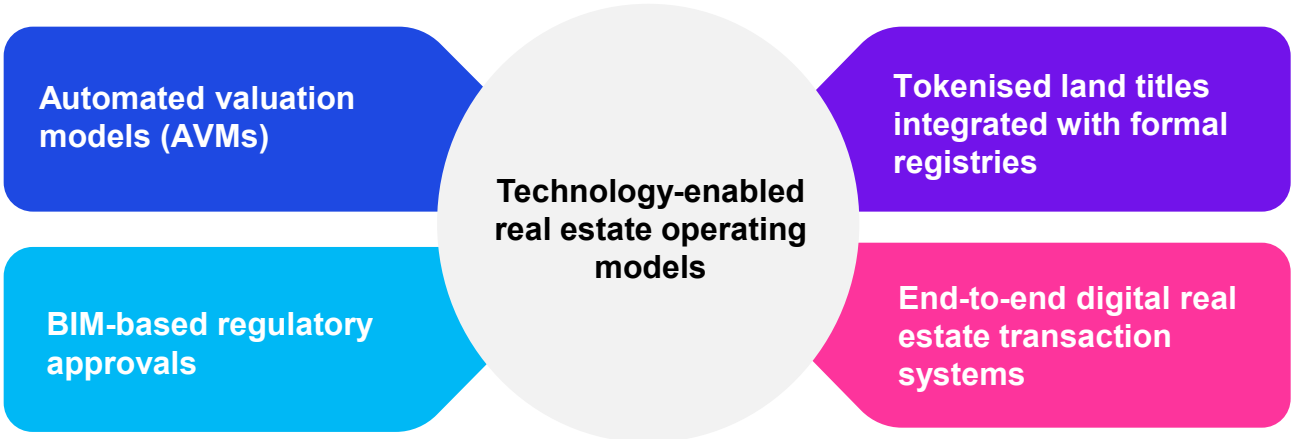
Digitally coordinated authorities for streamlined approvals

- Unified digital portals enable consolidated submissions, tracking and approvals
- Reduced dependence on informal coordination supports more predictable delivery timelines.

Impact: Project scale is enabled through process reliability and institutional alignment

Across leading global markets, these structural enablers increasingly take shape through specific, repeatable practices that embed technology into day-to-day development and approval processes. Together, these mechanisms reflect how regulatory clarity, planning certainty and institutional coordination are increasingly embedded through targeted digital solutions, shaping execution environments that support scale, predictability and consistency across projects.

Global practices supporting technology-based real estate delivery



Automated valuation models (AVMs)

- AVMs are now a mainstream underwriting tool, particularly for low-risk residential mortgage approvals and are being deployed across commercial asset pricing and portfolio-level assessments
- This shift reflects growing lender confidence in data-driven valuations that deliver speed, consistency and risk segmentation at scale, especially in high-volume, standardised asset classes.

BIM-based regulatory approvals

- Advanced global regulators increasingly use model-based submissions and automated code-checking workflows, enabling faster, more accurate regulatory approvals compared to traditional document-heavy reviews
- Standardised BIM protocols and digital regulatory compliance engines streamline approvals, improve data quality and strengthen lifecycle documentation across the built-environment ecosystem.

Tokenised land titles integrated with formal registries

- Tokenised land titles are increasingly being integrated with formal government registries, ensuring that blockchain-based ownership is legally recognised rather than operating as a parallel system
- It enables regulated fractional ownership and improve transparency across transactions, expanding the investor base, reduce transfer friction and repositions real estate as a liquid, accessible asset.

End-to-end digital real estate transaction systems

- Adoption of fully digital, government-backed end-to-end real estate transaction systems is enabling paperless, end-to-end online transactions with faster closures and market information
- This reduces delays as well as transaction costs and improves certainty on deal closure, supporting quicker capital recycling, better cash-flow planning and confidence in scaling transaction volumes.

- Across leading global markets, these examples demonstrate how technology has enabled smoother property transactions for buyers while improving regulatory, planning and valuation workflows across the wider real estate ecosystem
- In advanced property markets, buyer complexity is reduced through verified digital titles, escrow-backed payments and time-bound registration within a single approval process. It enables faster transactions, improved transparency and predictable ownership transfer
- For India, these practices offer practical reference points illustrating the ways in which targeted technologies could enhance the buyer experience, strengthen real estate delivery, support institutional participation and enable markets to operate more predictably as project activity increases.

7. Barriers to adoption and scale

As digital tools gain greater visibility across the entire value chain, Indian real estate is entering a transition phase where technology adoption is no longer aspirational but increasingly necessary. While technology is widely recognised as a strategic lever for efficiency, transparency and risk mitigation, large-scale digital adoption remains uneven. Structural, economic and organisational challenges continue to constrain the scaling of construction-technology solutions. Addressing these barriers is critical if technology is to progress beyond incremental efficiency gains and drive systemic transformation across the sector.

High upfront costs and ROI uncertainty

- Technology adoption often requires significant upfront capital, particularly for software and systems integration, which can place pressure on smaller and mid-sized developers operating on tight margins
- Tools such as BIM increase coordination and consultancy costs, as they typically require specialised consultants
- Evaluating return on investment can be challenging due to difficulties in quantifying efficiency gains, such as time savings and rework reduction.

Fragmentation and interoperability issues

- India's real estate sector continues to be highly fragmented, with varied processes, documentation practices, pricing models and vendor ecosystems across projects
- These variations limit interoperability between digital solutions and increase the complexity of scaling technology at a portfolio level, rather than deploying it on a project-by-project basis
- Inconsistent platforms and data standards create silos and coordination gaps, increasing errors and rework and limiting broader adoption.

Workforce capability constraints

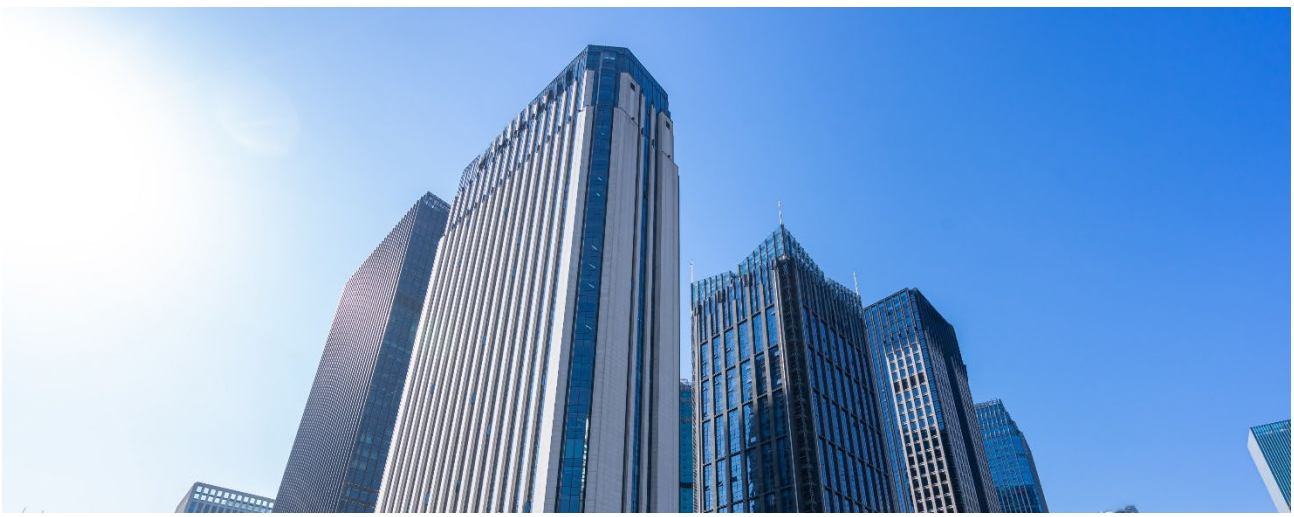
- Effective adoption of advanced digital tools is constrained by workforce-level digital skill gaps, as technologies such as digital twins and construction platforms require specialised capabilities such as model-based planning, data interpretation and digital workflow management
- There is a clear gap between industry demand for BIM-enabled delivery and the available talent pool, driven by a shortage of professionals with model-based and collaborative digital skills
- Limited availability of digitally skilled professionals slows implementation and scale, as firms face longer ramp-up periods when deploying new technologies.

Resistance to digital adoption

- Many builders continue to rely on conventional practices due to familiarity and limited awareness, leading to hesitation in adopting new technologies
- Digital adoption demands significant organisational shifts, new documentation practices and revised coordination methods, leading to concerns around execution complexity
- As a result, organisational resistance to digital workflows persists, leading to inefficiencies, coordination gaps and project delays, ultimately limiting full-scale adoption.

Data privacy and cybersecurity risks

- Growing reliance on digital and cloud-based platforms has heightened data privacy and cybersecurity concerns, as real estate projects involve sensitive commercial, personal and operational information
- Rising incidents of cyberattacks and data breaches, particularly in cloud-integrated environments, pose material risks, reinforcing caution when deploying digital tools at scale
- The need to safeguard sensitive project and customer data requires stronger security controls, adding complexity to digital adoption.



8.
Way forward

Technology adoption in real estate has so far been uneven and use-case driven, often limited to solving isolated operational challenges. While incremental digitisation has delivered pockets of efficiency, the next phase of value creation could depend on how effectively digital solutions are embedded across the end-to-end real estate lifecycle. As cost pressures rise, regulatory scrutiny increases and customers demand greater transparency and sustainability, the sector must move from fragmented experimentation to institution-led, scalable transformation.

Establish enterprise-wide digital transformation roadmaps and operating models

- Move beyond tool-level adoption by defining enterprise-wide digital transformation roadmaps that are aligned to business strategy, capital allocation priorities and regulatory requirements
- Redesign target operating models by integrating digital platforms, data architectures and governance frameworks across development, construction, sales and asset management.

Embed BIM into planning and building approvals

- Integrate BIM into planning and building approval processes, enabling authorities to review digital model-based submissions instead of static drawings
- Developers and contractors benefit from faster approvals, lower rework and improved execution, with BIM also enabling stronger data continuity across design, construction and asset management.

Build institutional and workforce capabilities

- Build workforce proficiency in digital modelling tools and collaborative workflows to enable effective adoption of BIM and other digital solutions across the project lifecycle
- Strengthen institutional frameworks, through aligned change management, governance and accountability, to help ensure digital investments translate into sustained productivity and execution gains.

Institutionalise data-driven project monitoring and execution transparency

- Deploy real-time project monitoring and construction intelligence platforms that integrate cost, schedule, quality and execution data across the project lifecycle
- Use these platforms to continuously track deviations from approved plans, flag execution risks early and enable timely, data-driven corrective actions by developers to minimise delays, cost overruns and rework.

Introduce AVMs with clear regulatory guardrails

- Adopt AVMs for residential and standardised commercial assets to improve valuation speed and consistency across high-volume transactions, supported by clear regulatory guidance
- Use these models as decision-support tools rather than substitutes for professional valuations, underpinned by strong data governance, auditability and model oversight.

Strengthen digital trust, cybersecurity and data governance

- Institutionalise robust data governance, cybersecurity safeguards and access controls as real estate platforms increasingly integrate financial, construction, customer and regulatory data
- Define clear data ownership, stewardship and cyber-risk accountability to safeguard sensitive project, buyer and investor data and preserve trust across the digital lifecycle.

Enable ecosystem-level integration and interoperability

- Adopt interoperable digital platforms to enable seamless data exchange across approvals, compliance, financing and project monitoring among developers, contractors, financial institutions and government bodies
- Better integration between private systems and public platforms can reduce execution timelines and enhance transparency.

As institutional capital deepens, regulatory oversight intensifies and buyer expectations evolve, India's real estate sector is expected to see digitally enabled coordination and execution discipline define competitive advantage. Technology is shifting from a tool for incremental efficiency to a foundational layer supporting execution certainty and governance. Success may depend on embedding digital intelligence across planning, approvals, construction, sales and compliance to drive end-to-end transparency and predictability. As technology, regulation and capital markets converge, a digitally integrated real estate ecosystem could become critical to accelerating project delivery, reducing execution risk and supporting sustainable growth at scale.

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