



AECO - The Next Digital Transformation

July 30, 2024

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Introduction



FOUNDED
1982



HEADQUARTERS
San Francisco, CA



EMPLOYEES (2023)
13,600+

IN FY23*

\$5.01B

Total revenue
(up 14% year on year)

6.74M

Total subscribers
(up 11.6% year on year)

\$1.2B

R&D investment
(24% of net revenue)

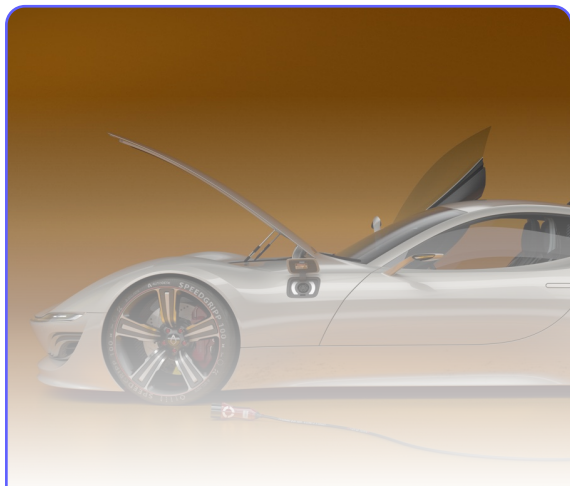
*Figures are from our fiscal year 2023, which began February 1, 2022 and ended January 31, 2023.





AECO

Architecture, Engineering,
Construction & Operations



D&M

Design & Manufacturing



M&E

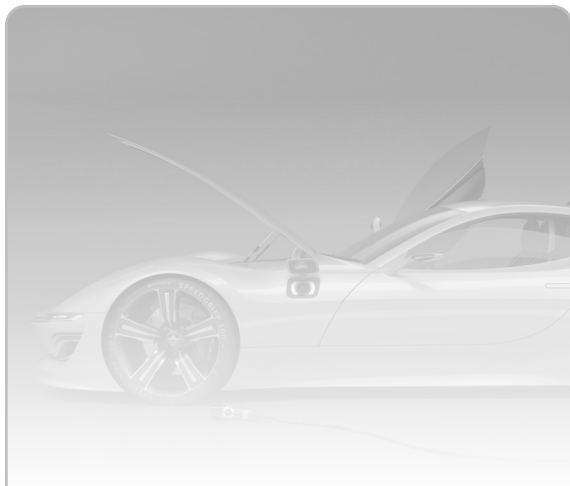
Media & Entertainment





AECO

Architecture, Engineering,
Construction & Operations



D&M

Design & Manufacturing



M&E

Media & Entertainment



AUTODESK
AutoCAD

AECO



Buildings



Transportation



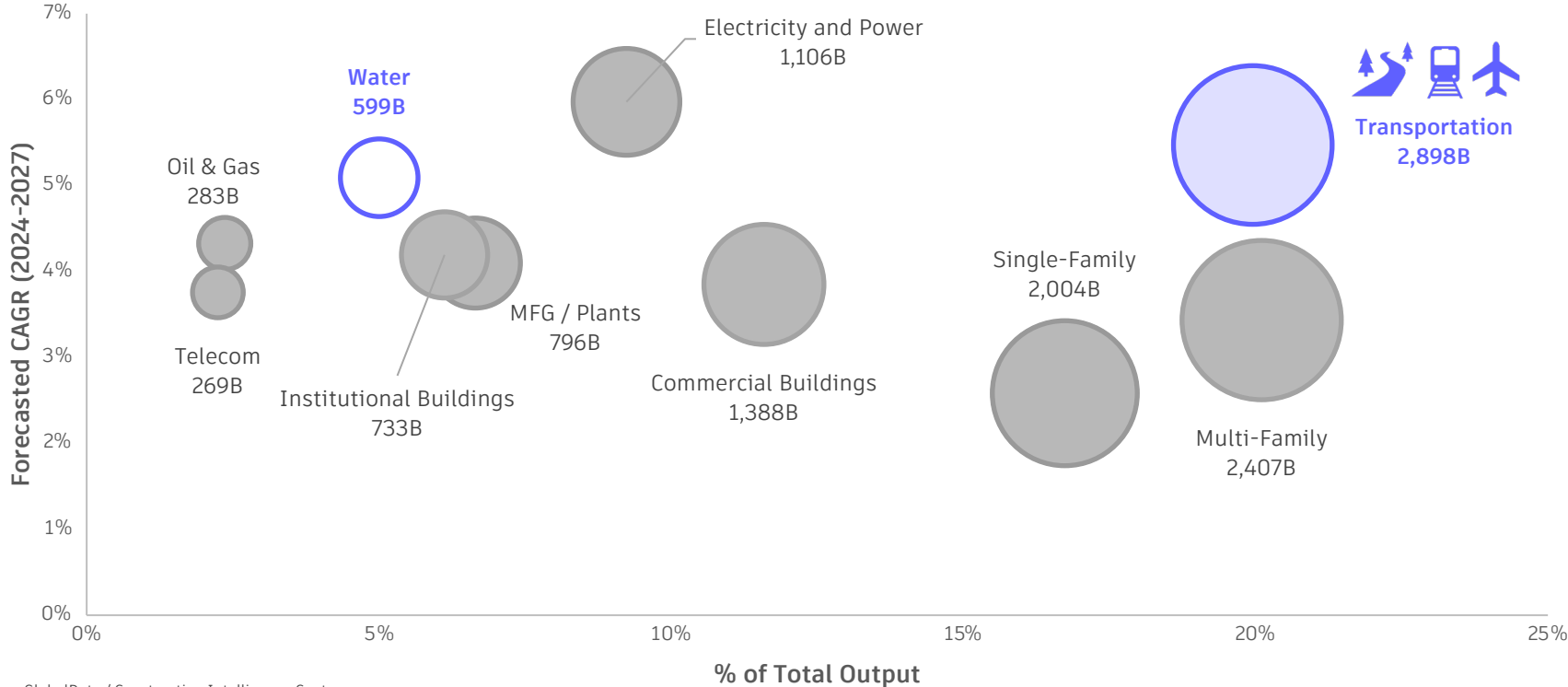
Water



Industrial

Transportation is the 2nd largest & fastest growing AEC market WW

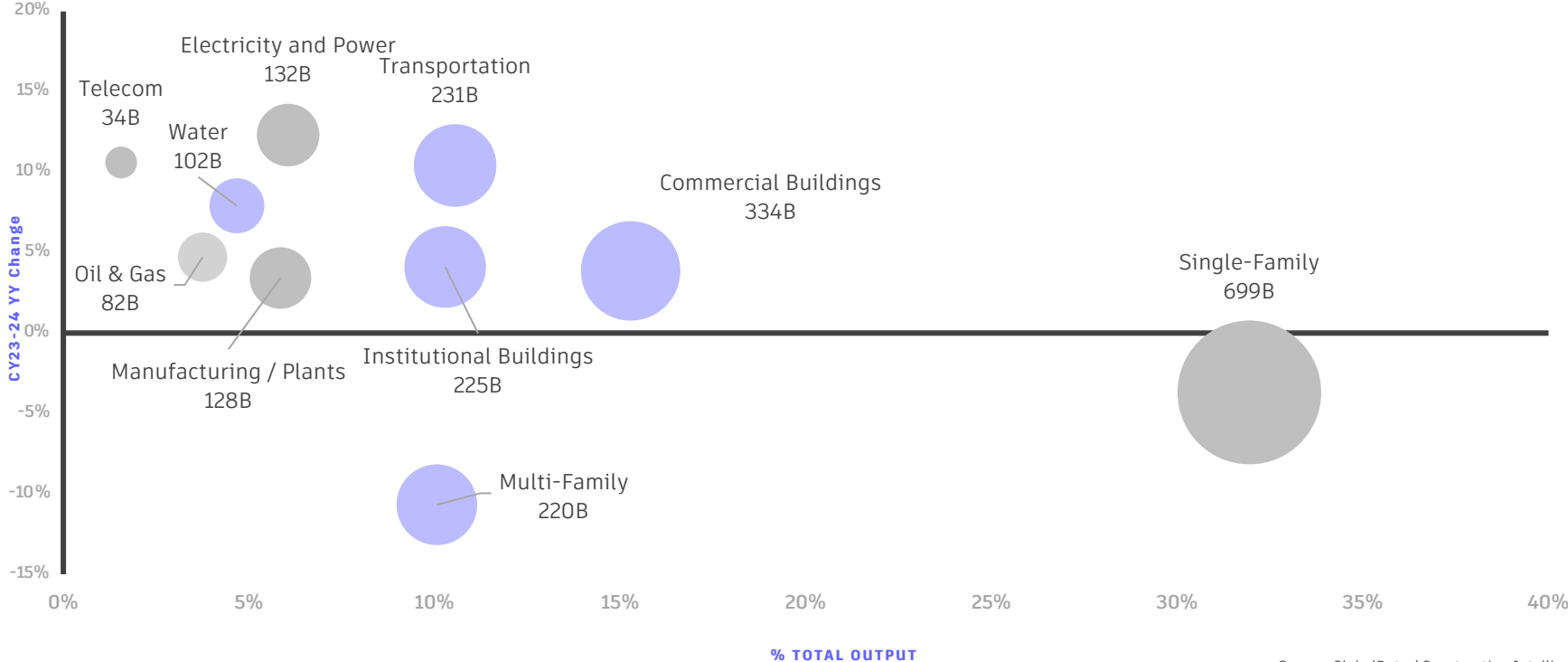
Global Construction Spend 2023 forecast by Segment



Source: GlobalData / Construction Intelligence Center

AEC Industry Segments | US Construction Spend 2024

Transportation and water are currently the fastest growing segments



Source: GlobalData / Construction Intelligence Center

Digitalization empowers global opportunities

65%

of architects and engineers see integrating designs across disciplines as critical to collaboration

The State of Collaborative Design in AEC, Tech-Clarity

79%

of AEC leaders say their companies' future growth depends on digital tools

State of Design & Make Report 2023, Autodesk

82%

of owners feel they need more collaboration with their contractors

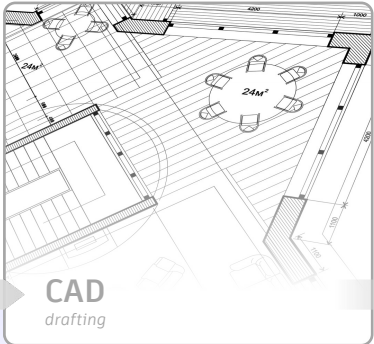
Climbing the Curve, KPMG



AEC Digital Transformation



Analog



CAD
drafting

SINGLE PRODUCT



BIM
3D parametric modeling

CAD

SPECIALIZED PRODUCTS



Connected BIM
common data environment

BIM

CAD

HYBRID CONNECTED PORTFOLIO

CAD

TECHNOLOGY EVOLUTION

Guiding customers through digital transformation



Experience

- Understanding & addressing collaboration challenges
- Delivering products that drive customer maturity



Technology

- Harnessing innovation to streamline processes
- Pioneering new technologies for real time collaboration

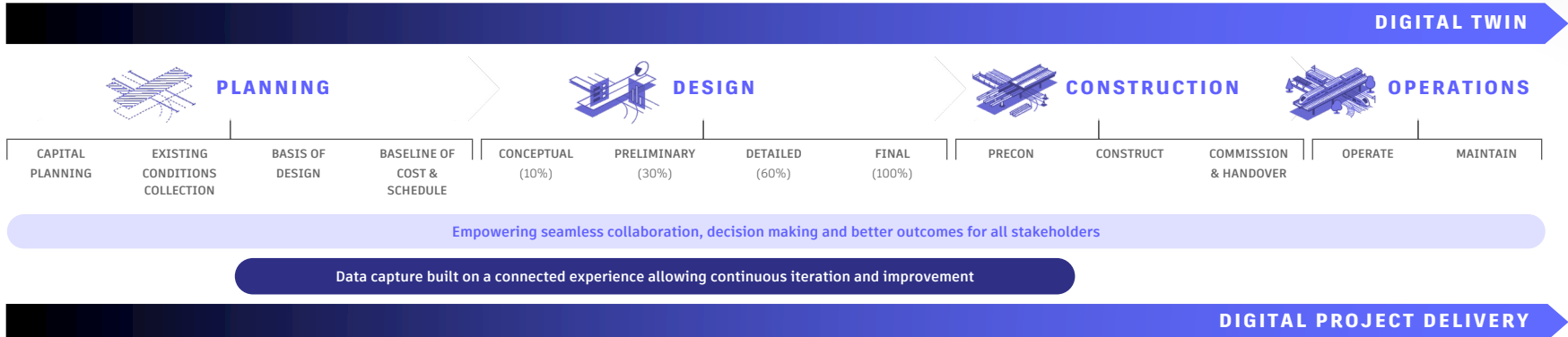


Trust

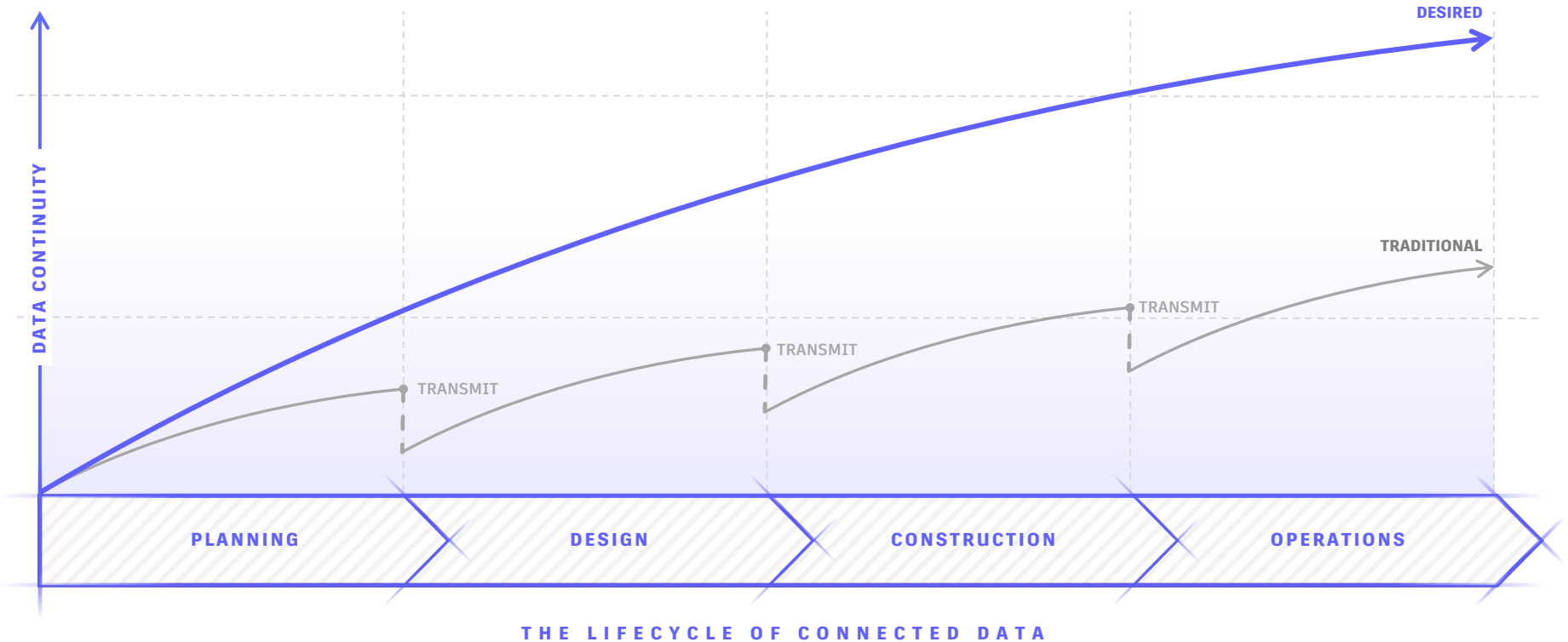
- Establishing secure tools for collaboration
- Partnering with customers to grow their business

BIM remains the backbone of Digital Transformation

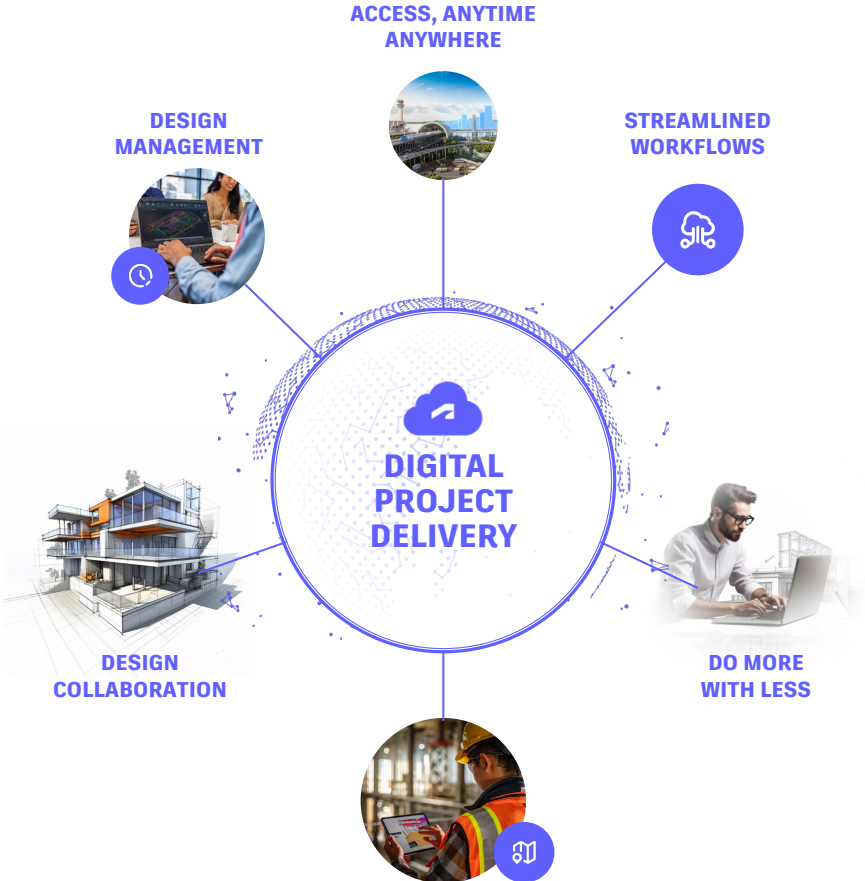
BIM uses digital models and data to facilitate the creation, visualization, analysis, and documentation of a capital asset resulting in improved decision making and better outcomes



Connected data across the project lifecycle maintains data continuity and preserves critical information



Unleashing The Power of The Connected Cloud for Digital Project Delivery



Digital Project Delivery utilizes a cloud-based Common Data Environment that optimizes project execution, resulting in new levels of innovation and efficiency throughout the project lifecycle



ARCHITECTURE & PRE-CONSTRUCTION (3rd PARTY)

ACTION-RESULTSM MAP Created: 5/12/2015 Last modified or saved: 5/18/2015

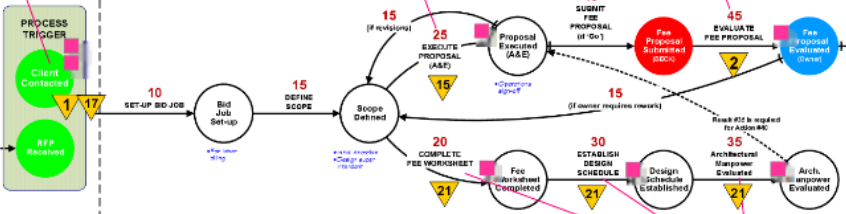
The Subject Matter Experts for this map include: Matt Pignone, Dallas Hughes, Chris Claytor, Debbie Corsagra, Jason Mullings, Todd Lehmann, Kelly Cone, Sean (?), Jeff Ratcliff (Host), Bryce Morrow (Sponsor)

Proof Copy #2
5/18/2015

- 50% of the time we chase the wrong thing (programs instead of claims) (1)
- 75% ask of definition of program budget for project team (7)

- 70% of 75% fee plus, not enough info on RFI (7)

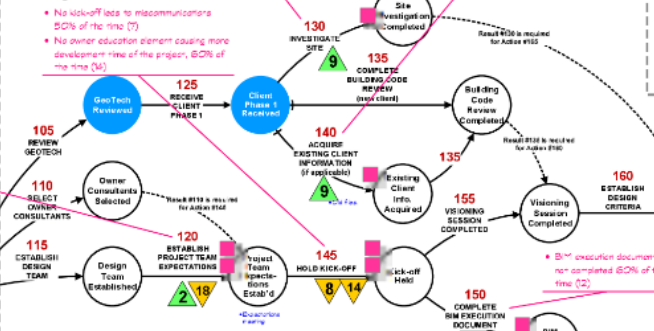
Client (Job) Pursuit (100%)



- Proposed legal review not completed 75% of the time (15)
- Time delay on getting signed contract 30% of the time (20)

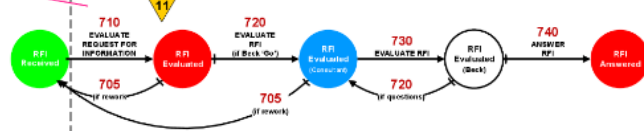
- 50% of the time we have to rework less capable specialist work (2)
- Commercial RFP's not part of the team communication value; different language between 'Design vs. Construction', 'Add Services' vs. 'Change Orders' (16)

Pre-Design (100%)



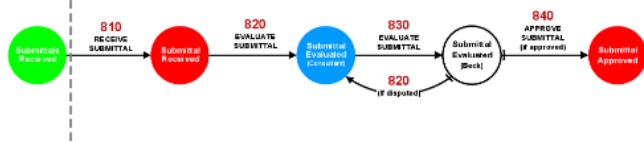
- No kick-off leads to miscommunications 50% of the time (2)
- No owner education element causing more development time of the project, 50% of the time (34)
- 50% of the time do not have existing conditions documented in a usable state to move forwards (2)
- Not getting all info from client in timely manner 50% of the time (2)
- BIM execution document not completed 50% of the time (2)

Requests for Information (100%)

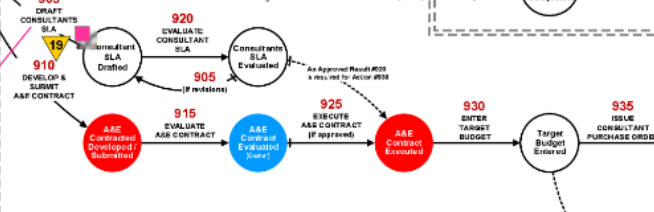


- Fee budget, schedule, manpower unclear to reach client & not to perform the work 25% of the time (2)
- SNA's not issued and ordered before a P.O. has been issued in 2-12 50% of the time (9)

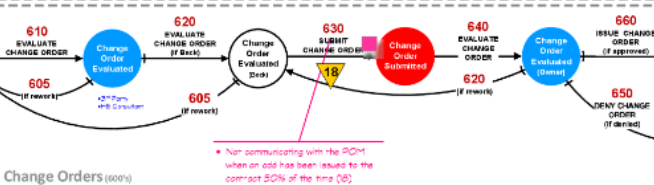
Submittals (100%)



Project Administration (100%)



Change Orders (100%)



- Not communicating with the RCM when an add has been issued to the contract 50% of the time (6)

Analog Delivery

Limitations of
traditional approaches

Paper-based processes

Incremental progress over decades

Paper, USB, and FTP for data delivery

Complicated workflows with gaps

Digital Project Delivery

Power of the
connected cloud

Integrated digital workflows

Accelerated progress through technology

Real-time, seamless delivery

Streamlined, cloud-based workflows



DIGITAL PROJECT DELIVERY VISION

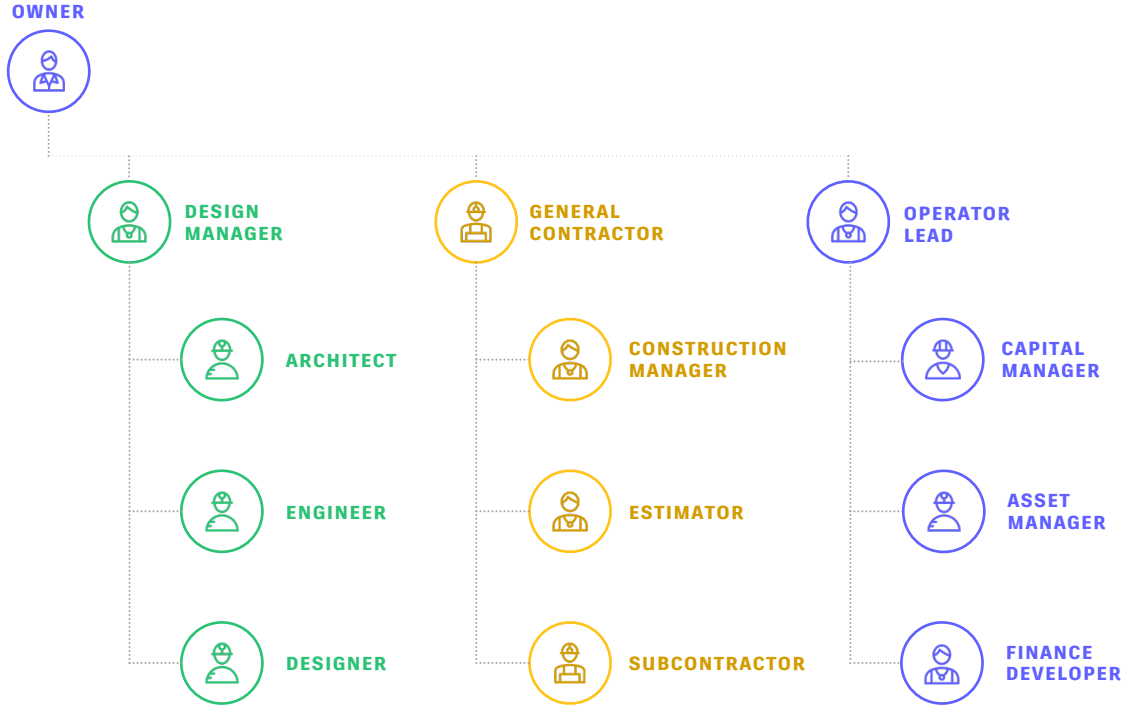
Empower our customers by streamlining design collaboration, elevating design management, and guiding the journey towards a future transformed by advanced digital technologies



Context on Current Project Dynamics

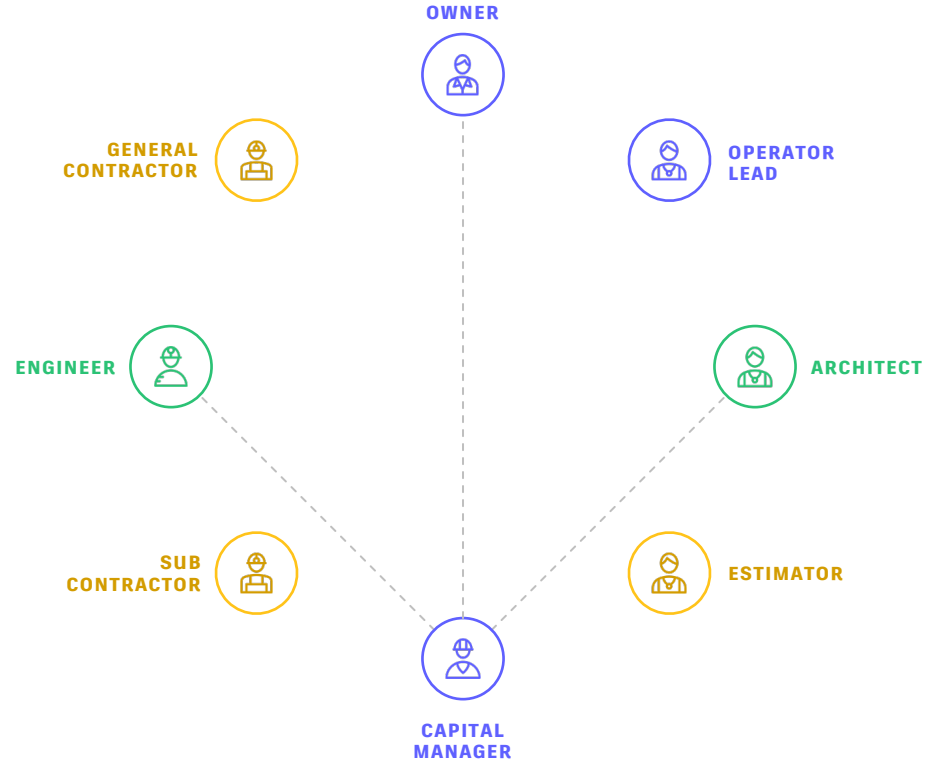
Hierarchy of Engagement

Complicated and disconnected communication flow



Delayed Communication

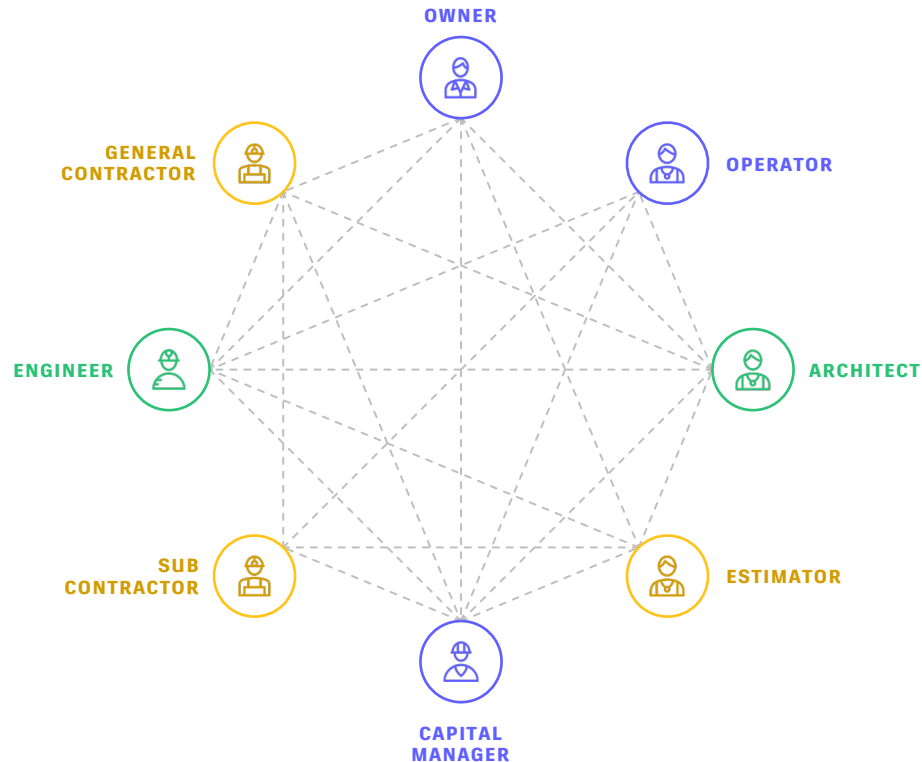
Slower resolution and extended timelines



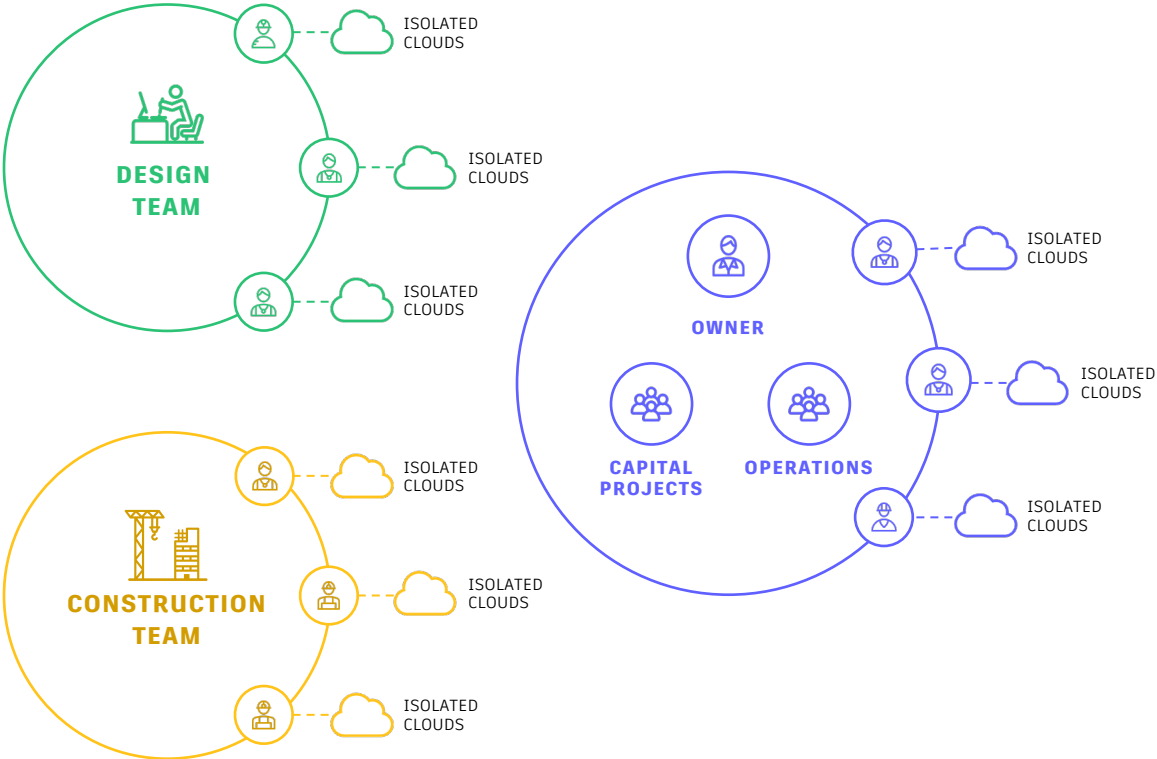
Legacy collaboration

Manual workflows lead to inefficiencies and wasted time

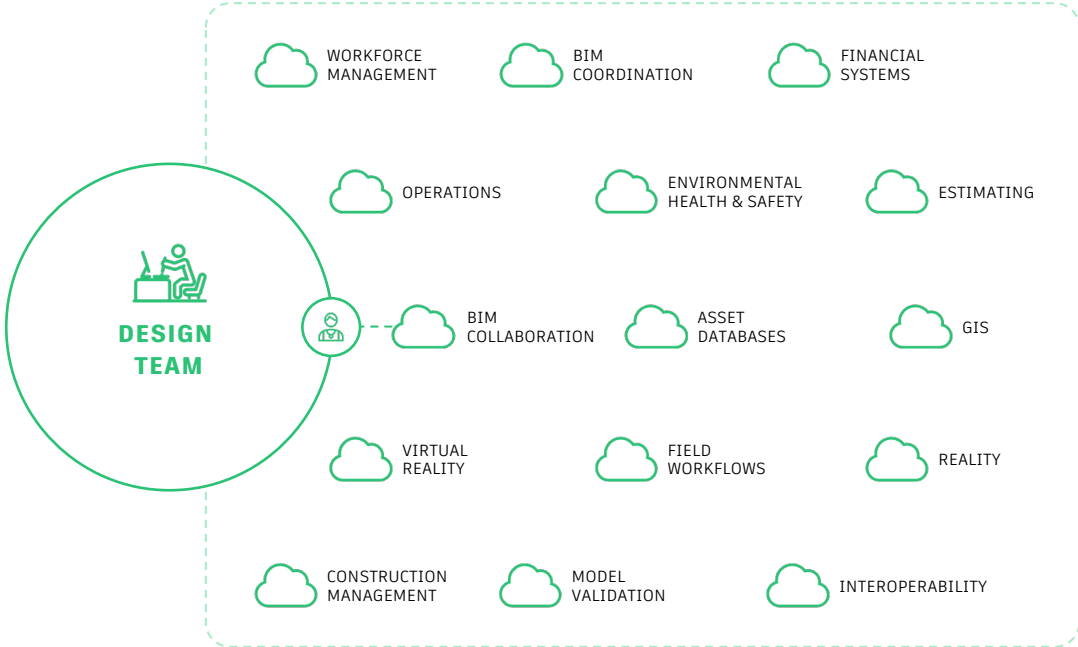
- ❌ NO STANDARDIZED PROCESS ENFORCEMENT
- ❌ TOO MUCH FRAGMENTED DATA EVERYWHERE
- ❌ INFORMATION DUPLICATION
- ❌ LACKING REAL-TIME COLLABORATION



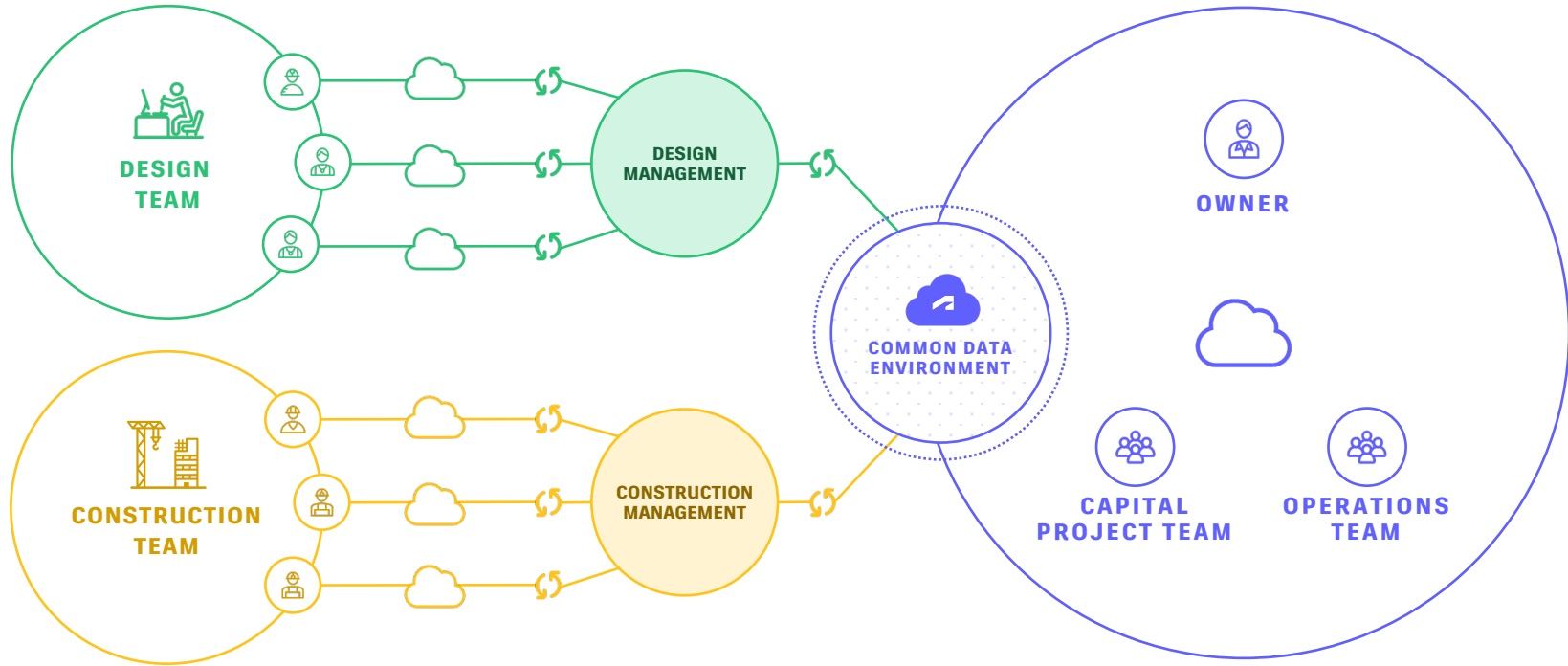
Teams work in many isolated clouds



**Furthermore,
each team
relies on many
cloud solutions**

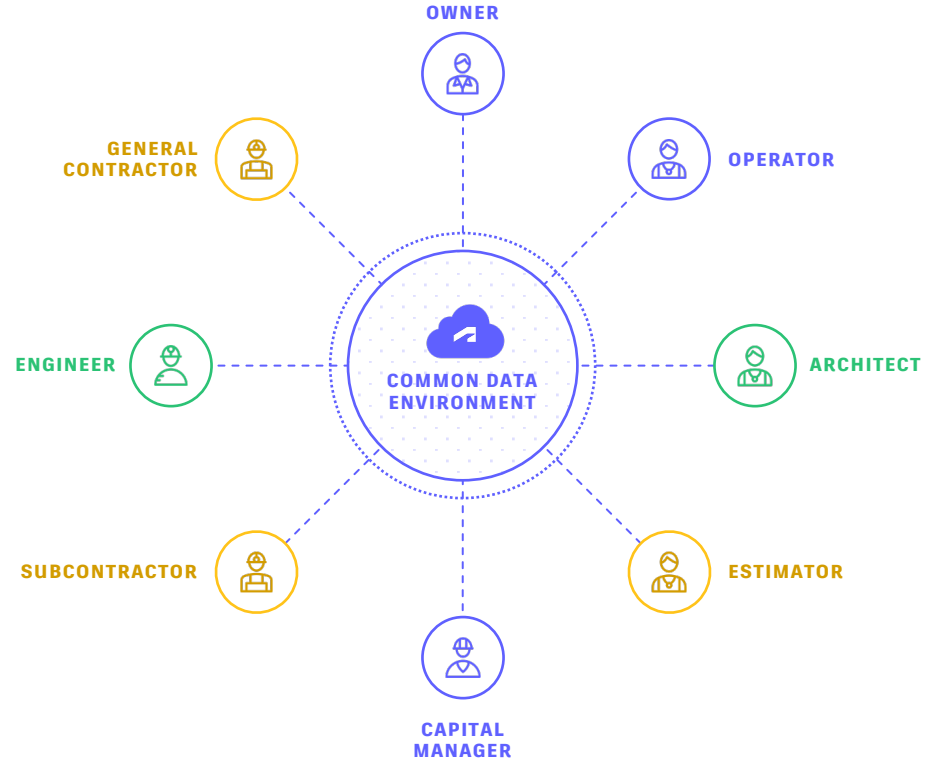


Digital Project Delivery is anchored on a CDE



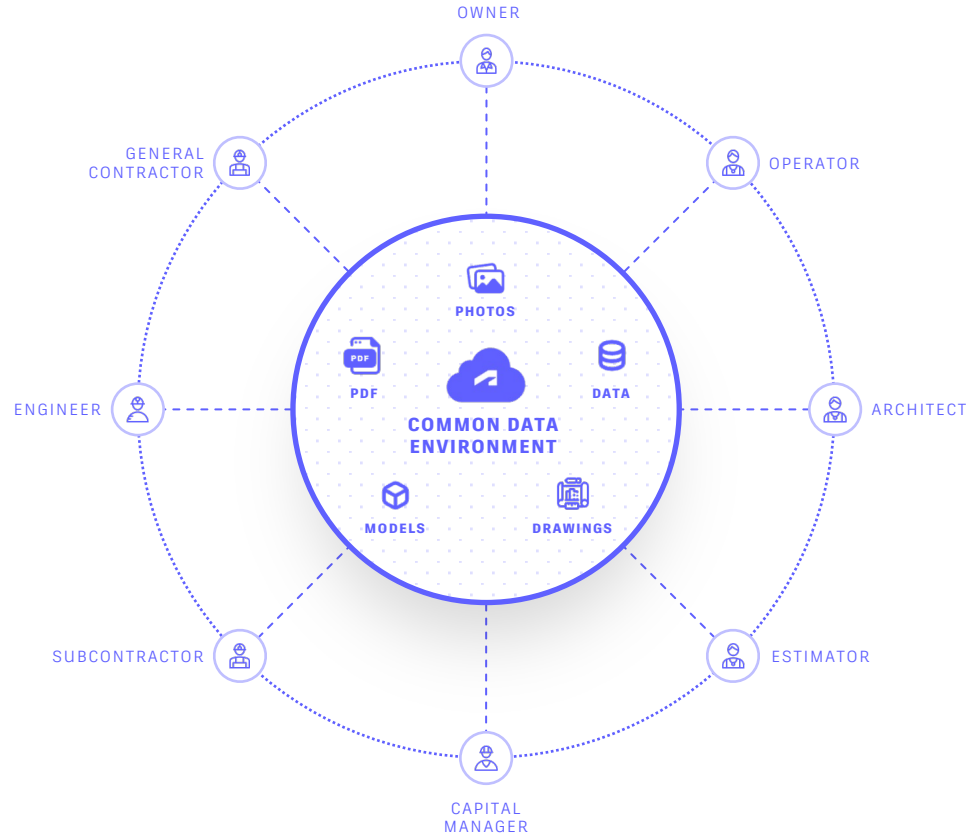
Common Data Environment

Enable a connected project stakeholder ecosystem



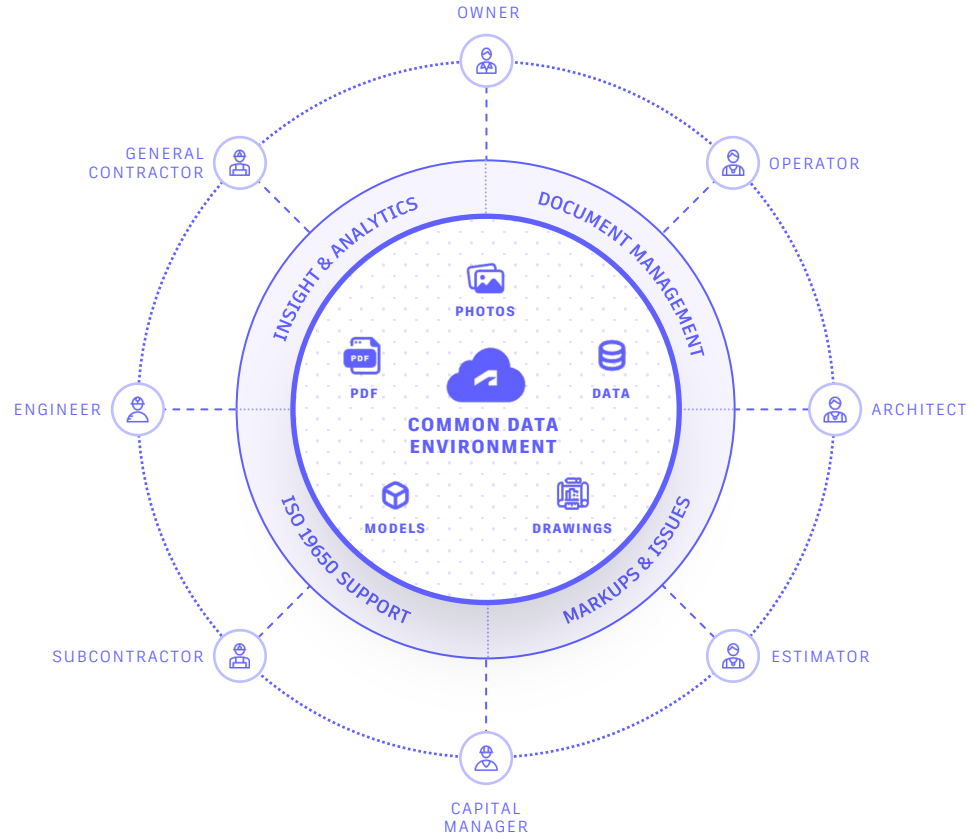
Centralized source of truth

Support multiple types of project files, models, and data



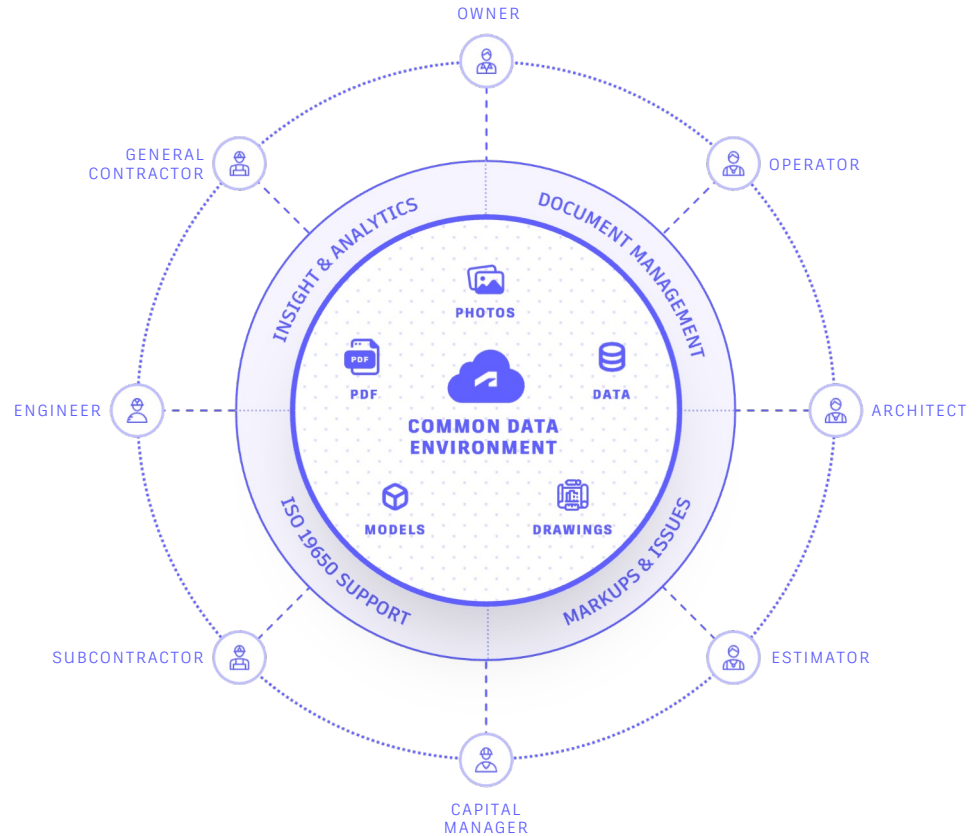
Fundamental collaboration capabilities

Connect people, processes, and data to improve performance



Fundamental collaboration capabilities

Connect people, processes, and data to improve performance



Autodesk Docs is the Common Data Environment

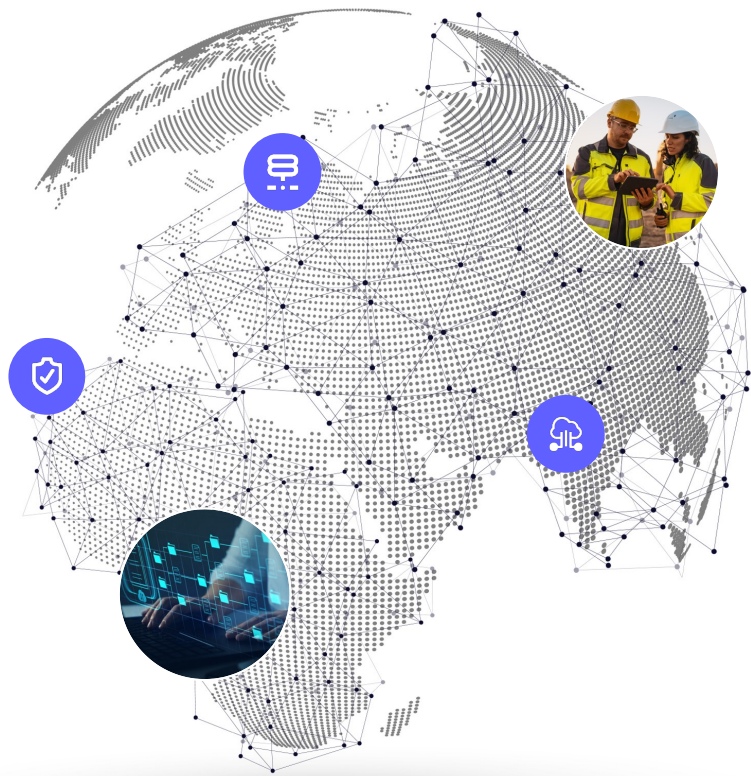
A single, cloud-based solution for storing and managing all project files and data across the lifecycle



Regionalization

Accelerating future regions

- Increasing investments in regionalization, security certifications, and cloud offerings
- Automating and scaling internal processes common to all platform services
- Streamlining deployment processes and common practices for new regions



Autodesk differentiates with approach to regionalization



Secure products and infrastructure



SOC 2, SOC 3, & ISO 27000 series audits



FedRAMP

FedRAMP and regional security certifications

Enhancing regionalization for trust and performance



Providing transparency with storage of content



Moving towards regional data processing



Continuing to invest in performance and resiliency

Enable customers to deliver projects without boundaries

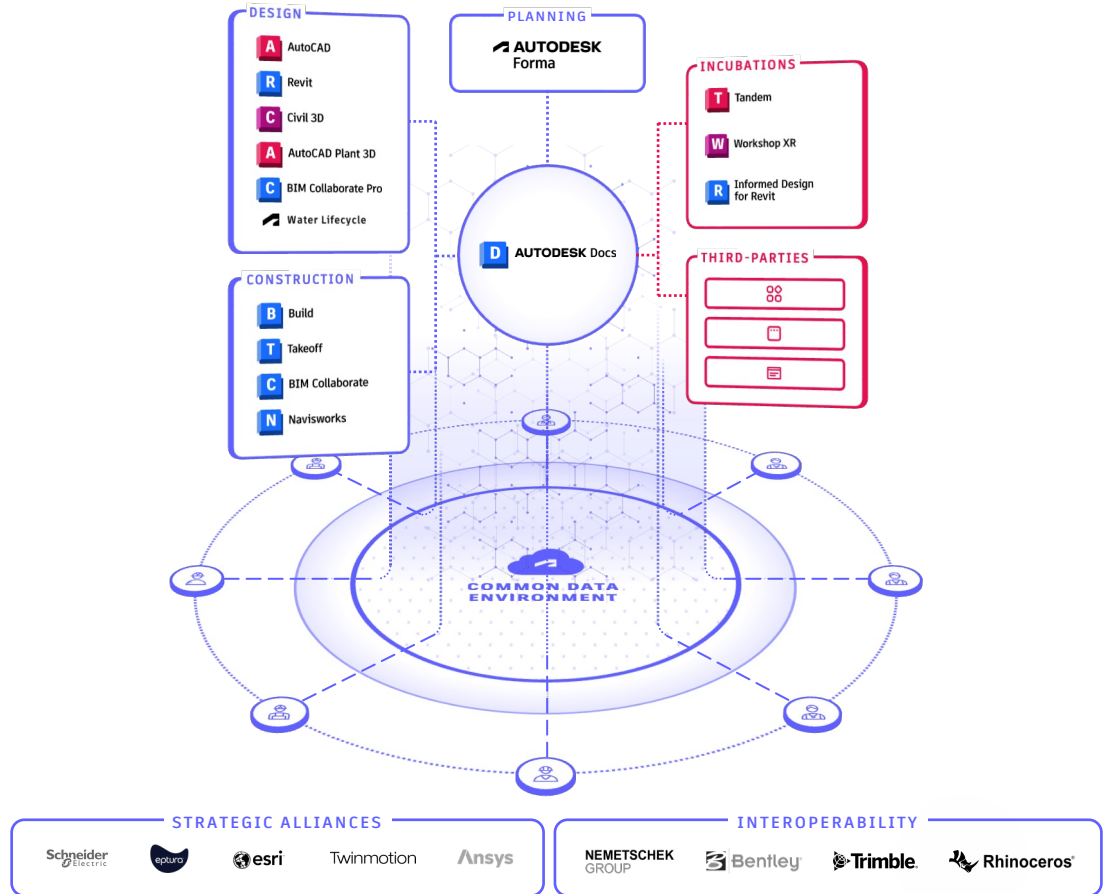
- Seamless access to data anytime, anywhere, and from any device
- Reliable performance and reduced latency
- Support customer preference or requirement for data residency
- Protection of sensitive data and privacy



Project Delivery Overview

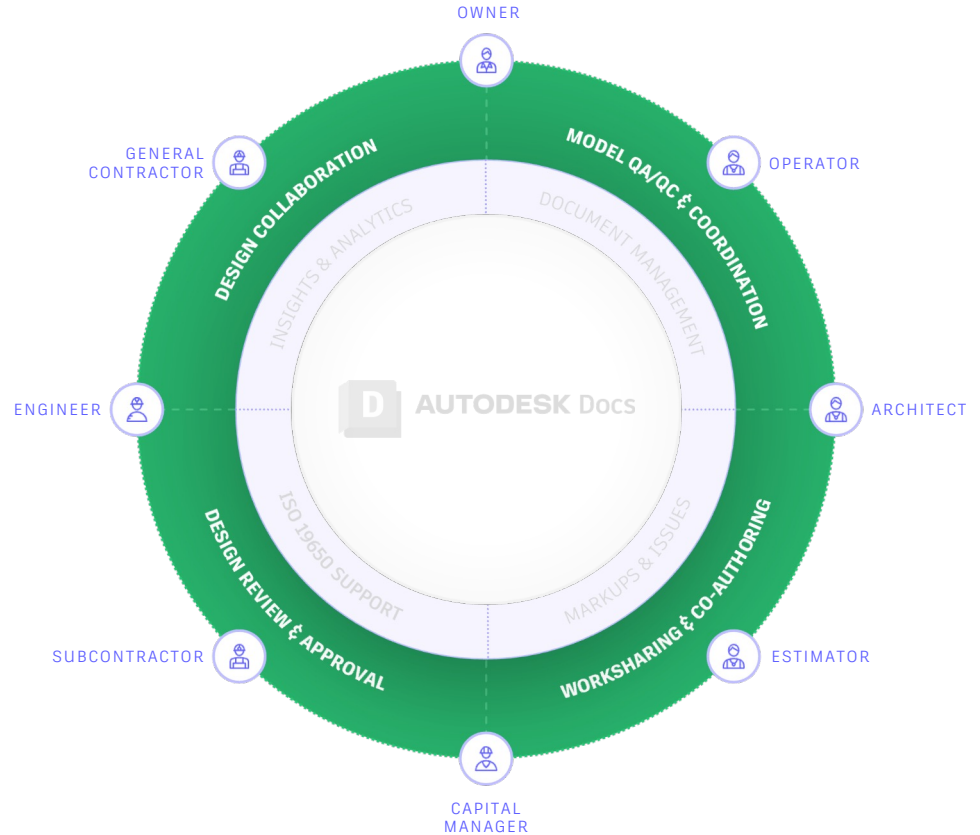
Core design tools connected to Docs

Integration between desktop applications and Docs unlocks design data for cloud applications



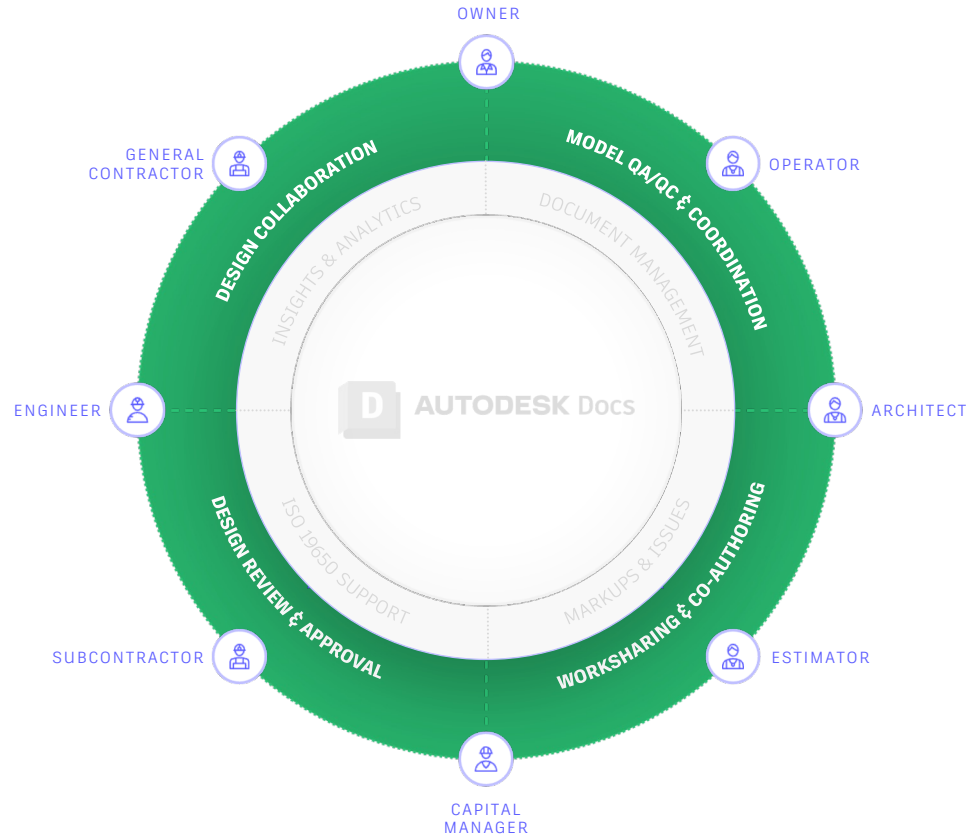
Design collaboration capabilities

Empowering teams through collaborative design development



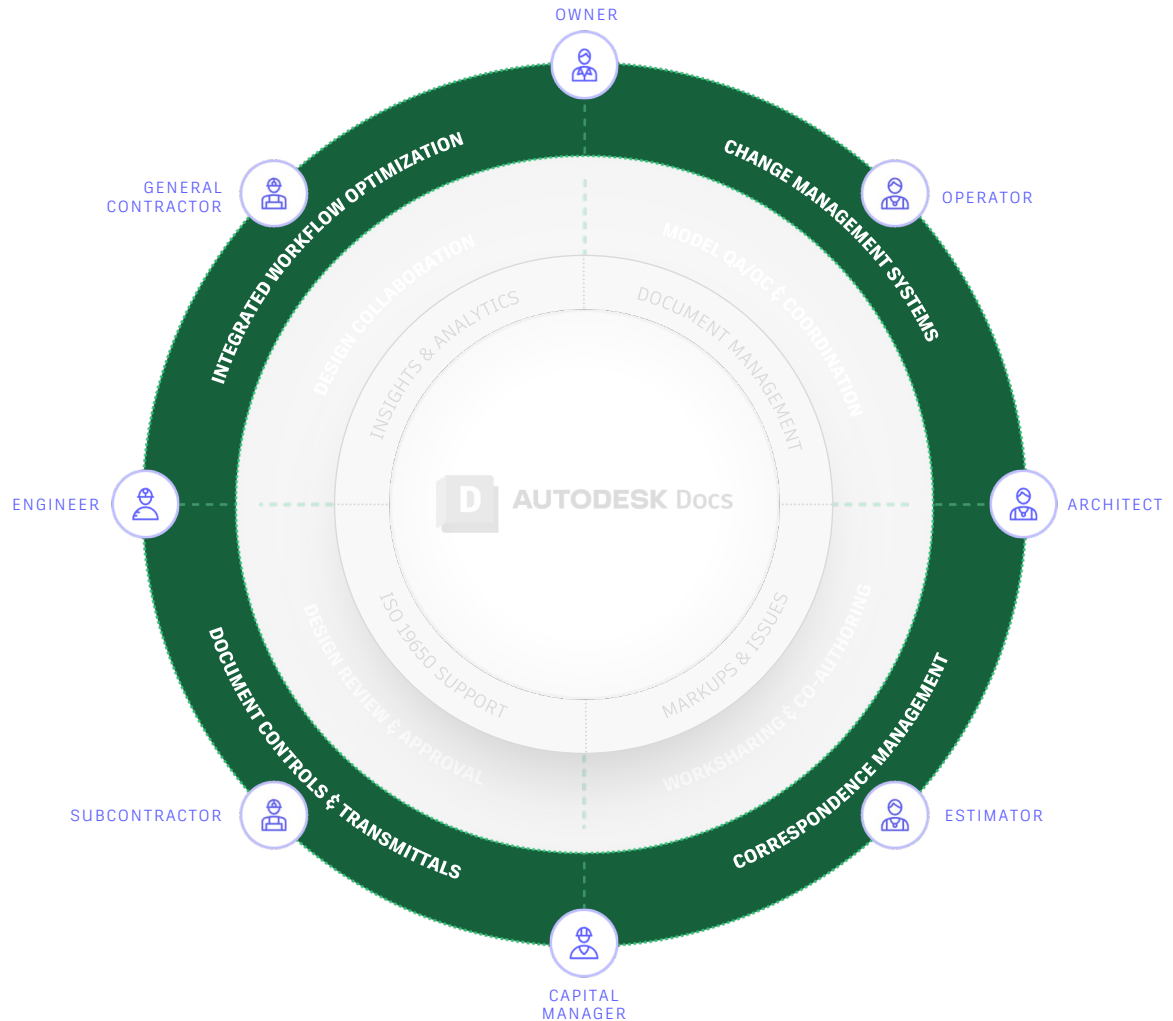
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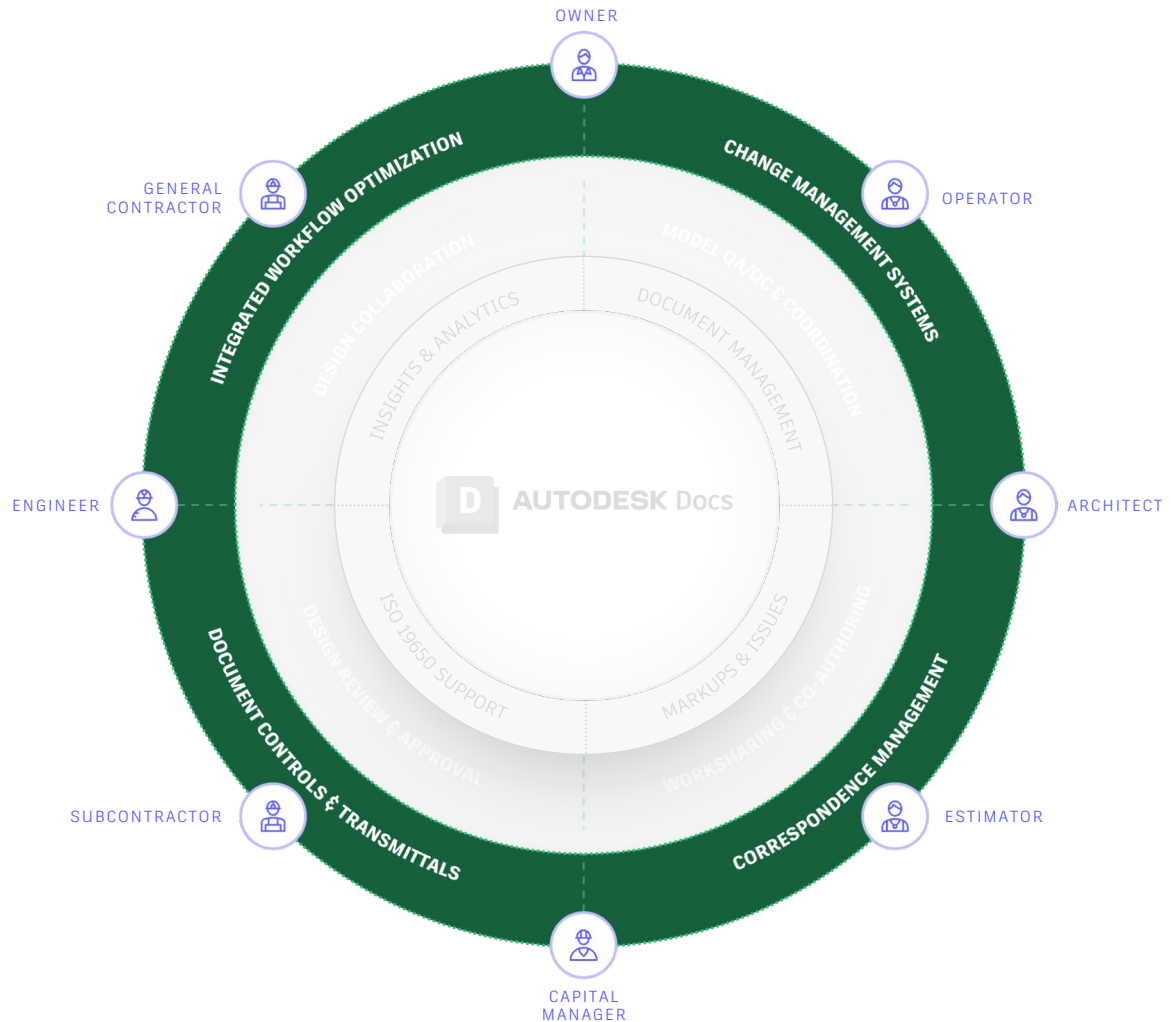
Design management capabilities

Empowering teams with efficient processes and enhanced project controls



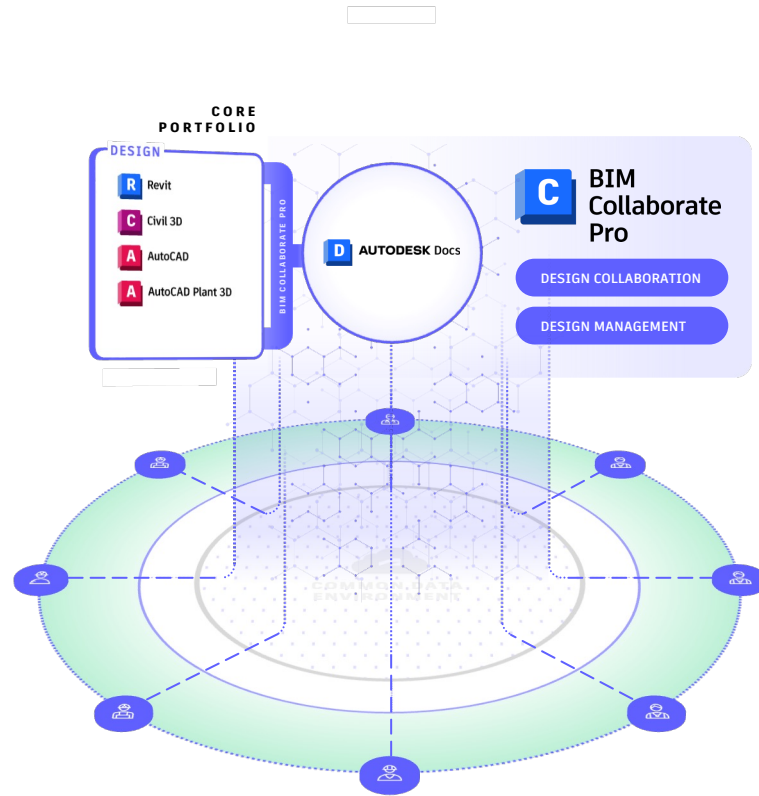
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BIM Collaborate Pro is the solution for Digital Project Delivery

Scale design capabilities on the cloud – design collaboration and design management for teams working on projects



Design Collaboration



2023 State of Design & Make

Digitally mature companies report that they are prepared to handle change at higher rates than those from less digitally mature companies

57%

uptick in the consumption of cloud resources by AECO companies in the first year of the pandemic



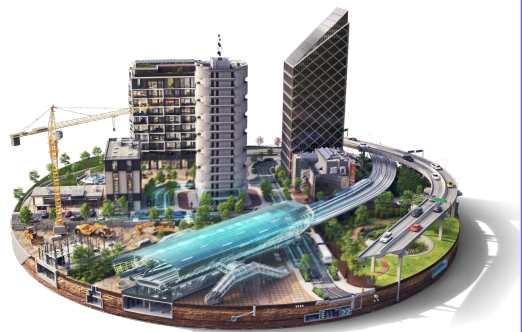
Digital Project Delivery Strategy



Design Collaboration

Facilitating Multi-Disciplinary Design

- Integrate desktop CAD & BIM seamlessly
- Enable design review & approvals
- Enhance model QA/QC & coordination



Design Management

Managing Information & Processes

- Empower data management & controls
- Facilitate integrated & agile processes
- Leverage data-driven insights



Digital Project Immersion

Redefining Design Innovation

- Accelerate outcome-based BIM
- Unleash AI-enabled capabilities
- Cultivate immersive experiences

Collaboration maturity drives project outcomes



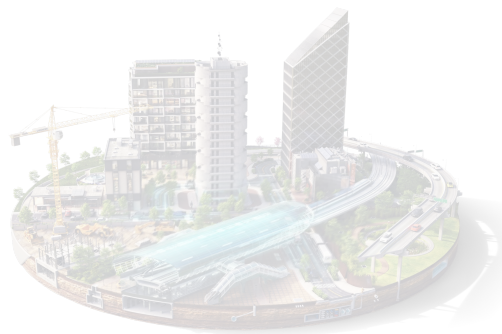
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Design Collaboration

Repeatable cloud-based worksharing and reviews leading to collaborative editing, risk reduction, and enhanced performance of design information



Challenges without a connected cloud

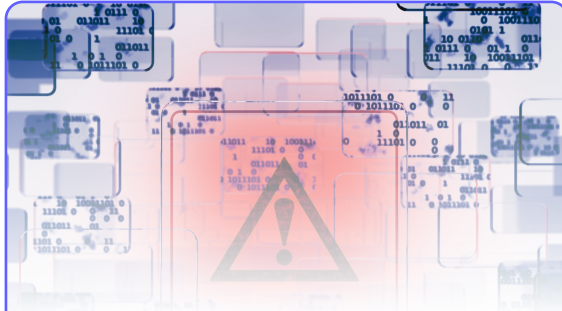


Barriers to adopting connected cloud



Cost constraints

Perceived costs of cloud services



Fear of change

Resistance due to concerns of disruption



Lack of guidance

Uncertainty about where to start

CUSTOMER ASSURANCE

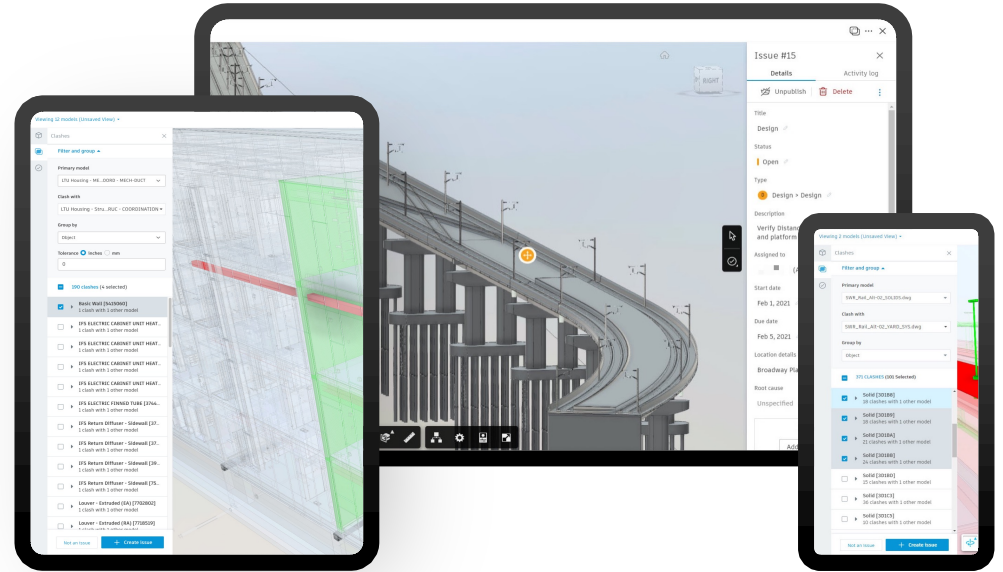
- Local infrastructure costs more compare to cloud subscriptions
- Connected cloud offers flexibility and resource optimization
- Embracing changes leads to improved collaboration & efficiency
- Change brings enhanced project outcomes & business resilience
- Effective onboarding guides through stages of adoption of connected cloud
- 40% of AEC reported pandemic spurred finding of new innovations¹

1. Autodesk, 2023 State of Design & Make report



Unlocking the power of Design Collaboration

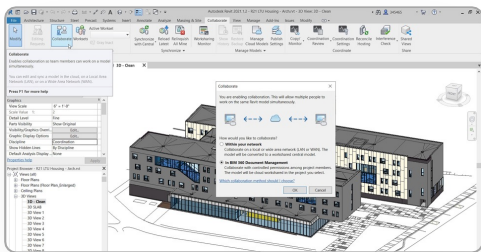
- Co-author, collaborate, and share project data for Revit, Civil 3D & Plant 3D
- Centralize, organize, and structure design data in a single cloud environment
- Manage issues, coordinate models, and advance project visibility in the cloud



Desktop Authoring

Facilitate worksharing and collaboration from the cloud

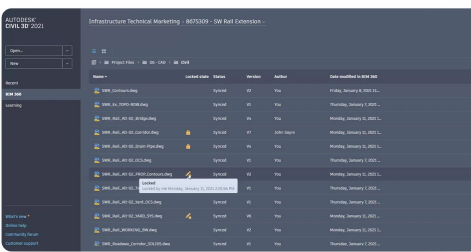
R AUTODESK Revit



Revit Cloud Worksharing

Collaborate seamlessly on Revit models in real time, anywhere, across teams

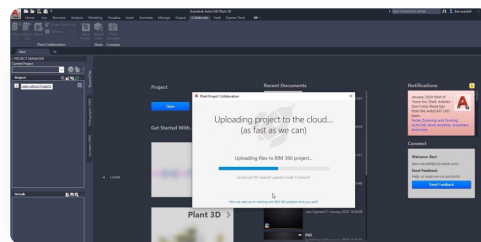
C AUTODESK Civil 3D



Collaboration for Civil 3D

Quickly workshare Civil 3D files, xrefs, and data shortcuts, from one cloud accessible location

A AUTODESK AutoCAD Plant 3D

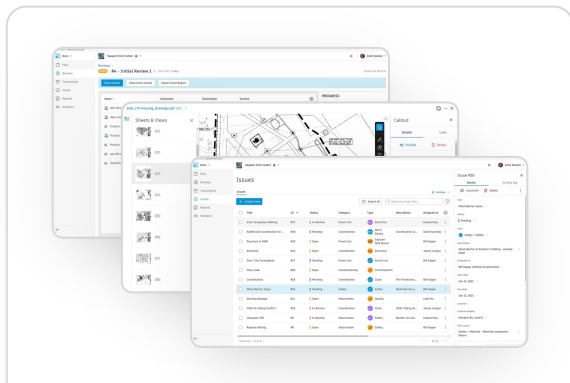


Collaboration for Plant 3D

Securely collaborate on Plant 3D files in a cloud-based environment

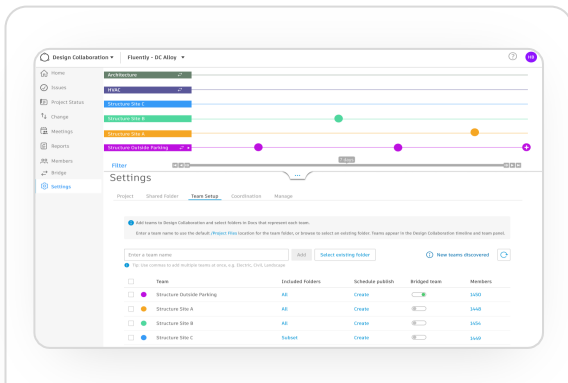
Design Collaboration

Enhance teamwork, communication, and design quality to increase performance



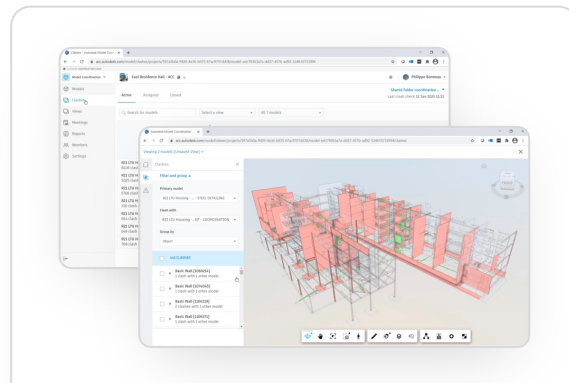
Reviews & Issue Management

Coordinate quality reviews for many file types with issue tracking while following workflow progress



Bridge for Design Collaboration

Secure and automated design file sharing across projects meeting diverse contract deliveries



Model Coordination

Efficiently automate design clash detection and organize coordination issues for resolution to reduce risks

Design Management

Digital Project Delivery Strategy



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Digital Project Immersion

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Design Management

Flexible cloud-based processes to set up projects and manage communications, milestones, and contract obligations connected to business performance

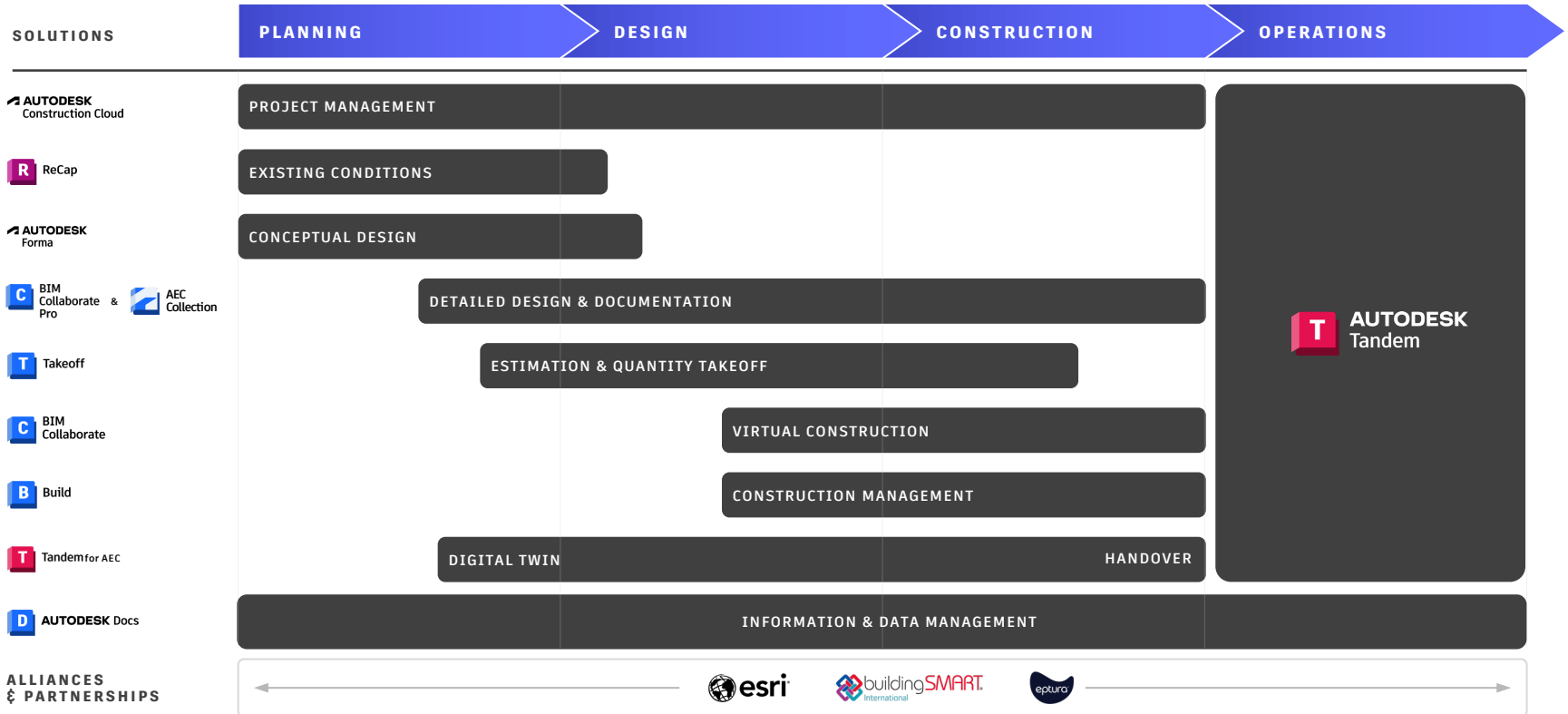


Effective digital processes through Design Management



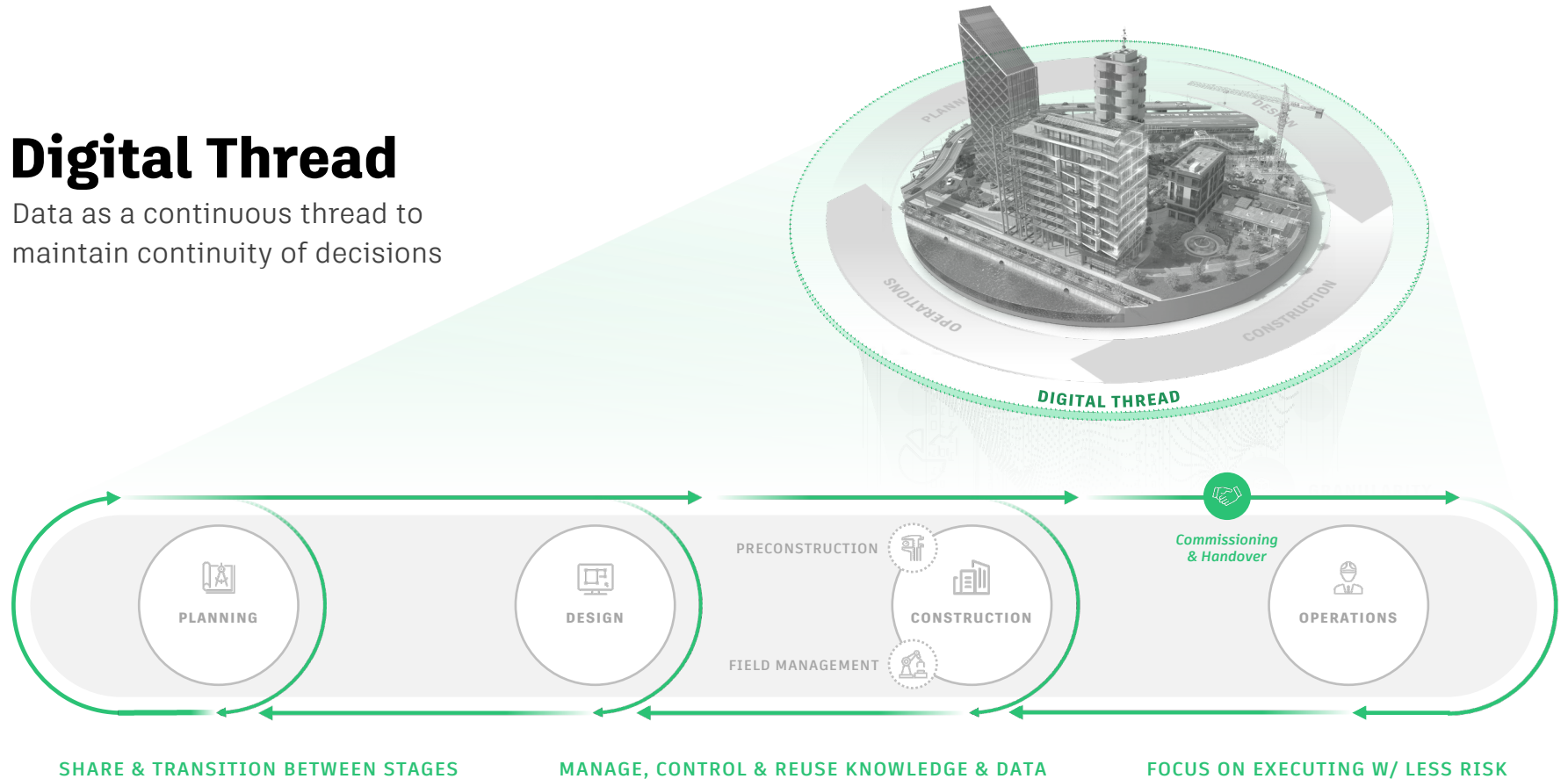
Design Management optimizes information flow

Seamless exchange of data across the lifecycle



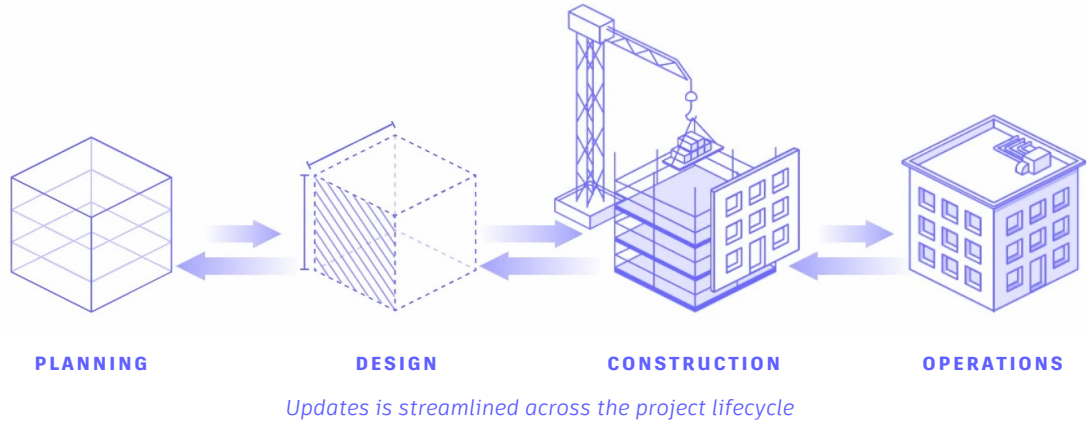
Digital Thread

Data as a continuous thread to maintain continuity of decisions

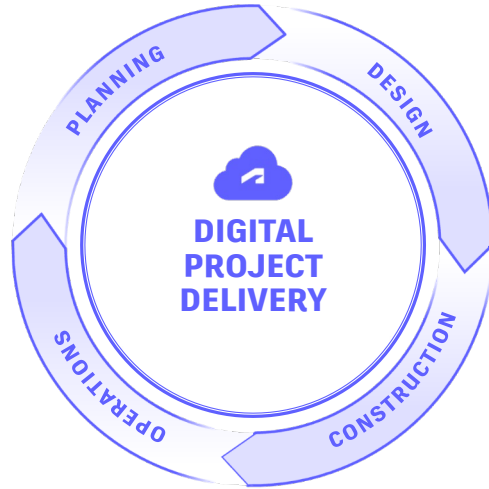


Seamlessly connecting past and future

- The digital thread streamlines changes across teams and phases
- Bi-directional connectivity enables seamless exchange of data
- Integration of data and processes culminates in a digital twin



Outcomes across the lifecycle



Solution
for project lifecycle outcomes
promoting reduced cost of ownership



Historical Records

Central repository for easy access to relevant system information



Data Integrity

Design to install modelling to reduce errors and rework



Transparent Engagement

Improved communication across phases increases on-time project deliveries



Connected Ecosystems

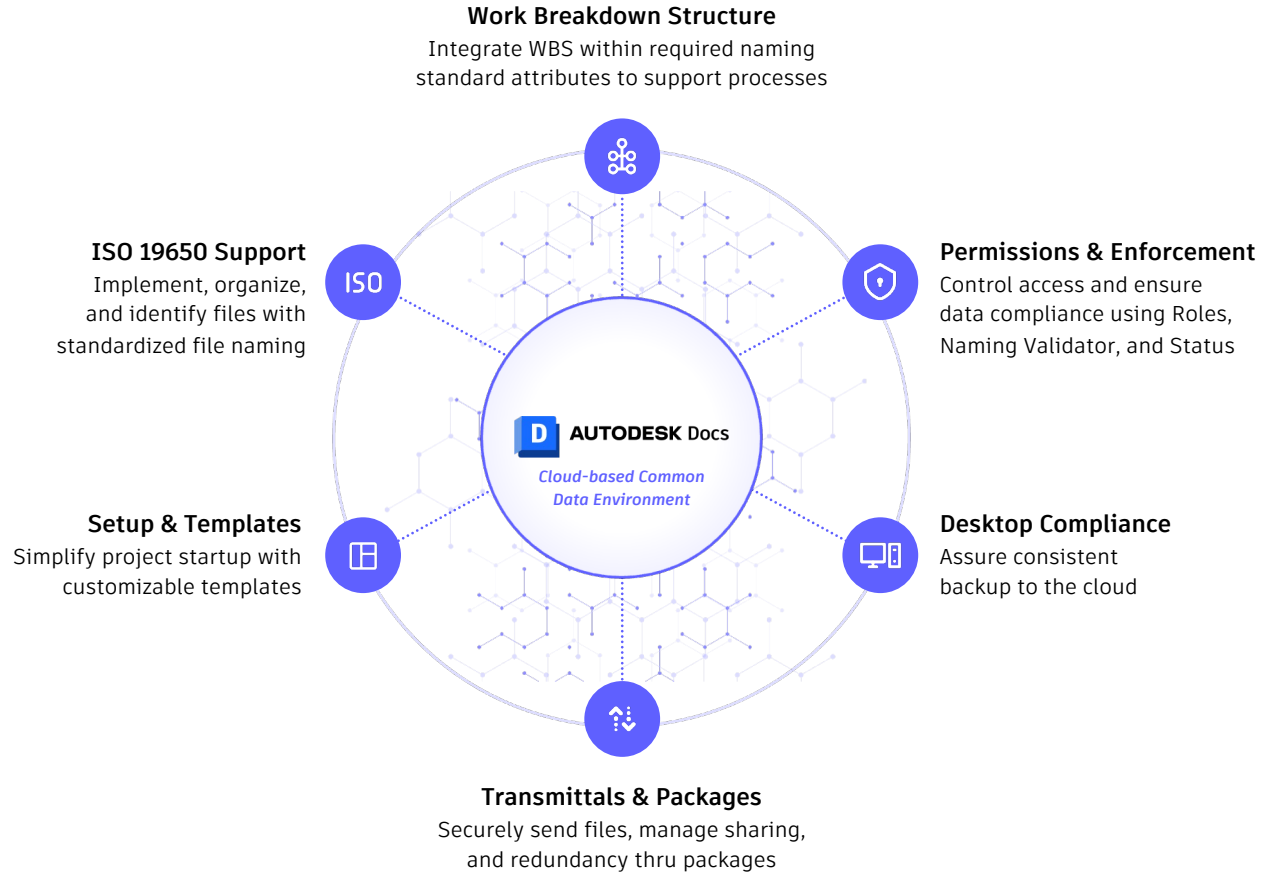
Multi-disciplinary collaboration with integrated systems to extend the life of data



Tailored Experiences

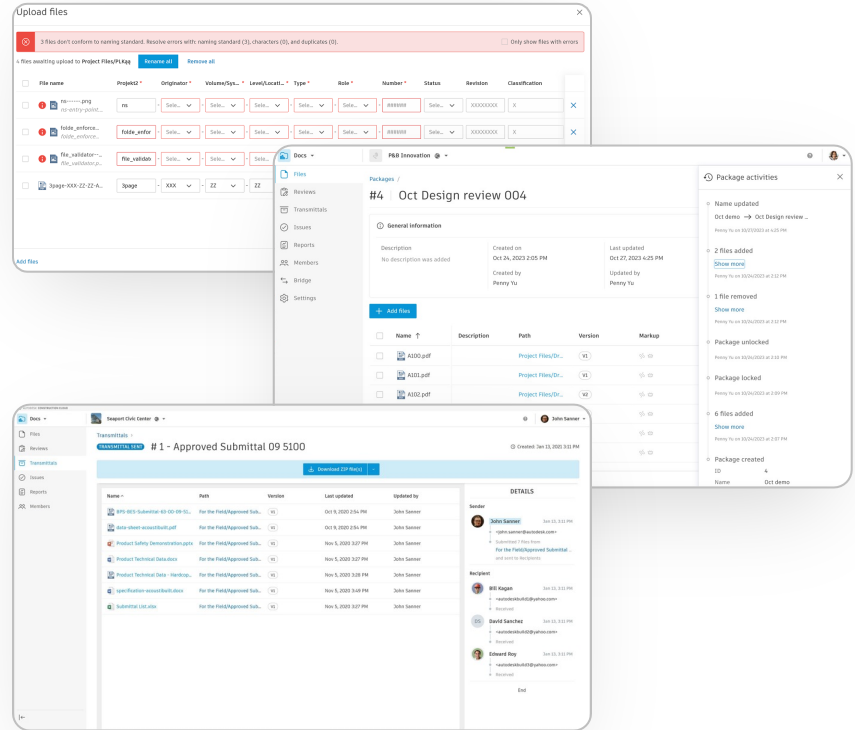
Meeting many ways of delivering projects and managing assets

Autodesk Docs for Design Management



Data management in a single repository with robust controls

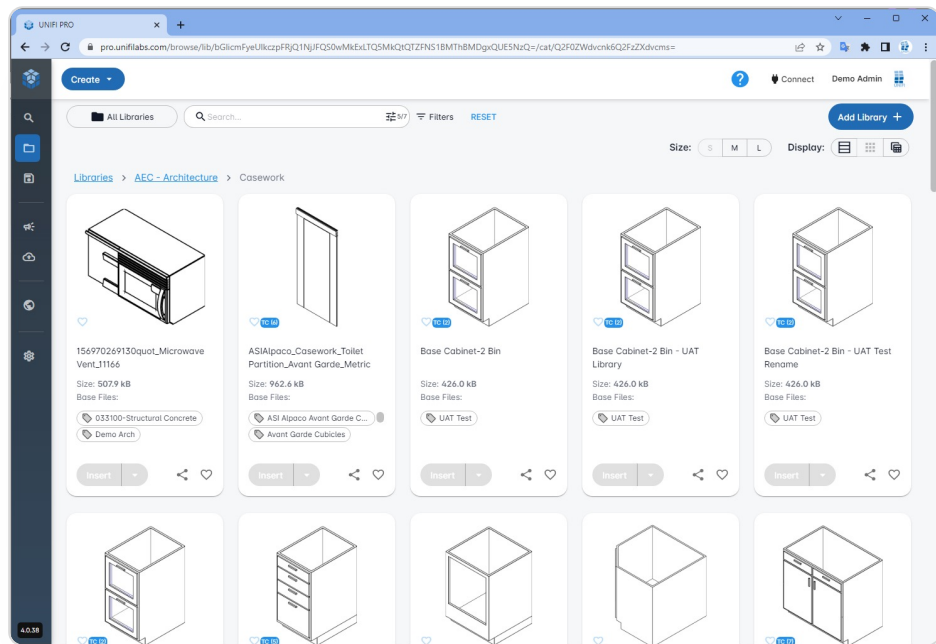
- Control permissions and access while ensuring data compliance using Roles, Naming Validator, and Holding Area
- Assure consistent information management through desktop apps saving to the cloud
- Securely send transmittals, manage sharing, and reduce file storage redundancy through packages



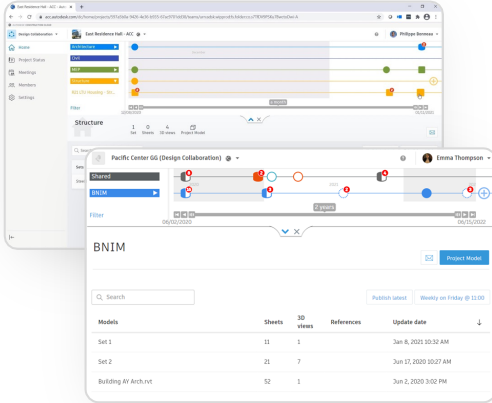
AUTODESK DOCS (NEW)

Content Catalog for cloud-based content management

- Maintain component standards by centralizing BIM content on the cloud
- Enable teams to focus on design by reducing time searching & loading content
- Read and write BIM data programmatically through open APIs



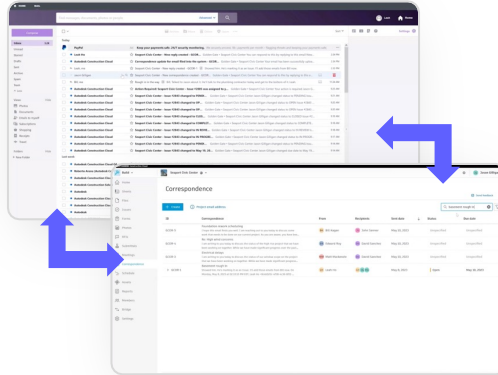
Efficiently Manage Design with BIM Collaborate Pro



Activity Tracking

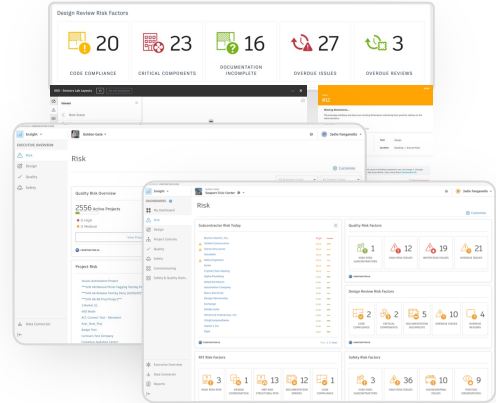
View dates and contents of shared designs, managing data exchange on multidiscipline projects

NEW



Correspondence Management

Centralized communication from internal and external email sources within your connected project



Observe Insights

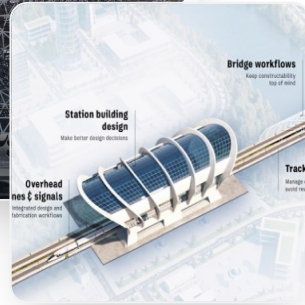
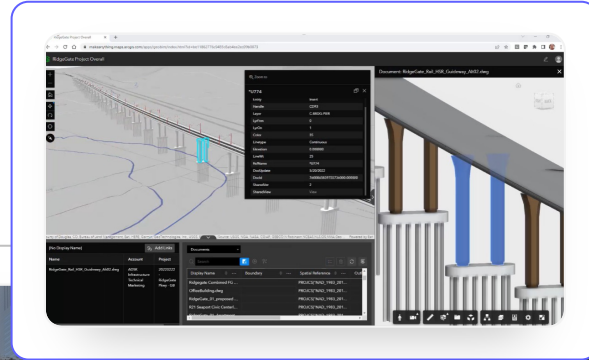
Empowering decision-making through predictive analytics and individualized insights

ALLIANCES



Driving BIM & GIS convergence

- Leverages the combined capabilities for improved project lifecycle outcomes
- Geospatial context for engineering projects drives increased collaboration and coordination
- Data connectivity through the asset lifecycle enabling new efficiencies across teams



AEC Content

Building Information Models



GIS Context

Imagery and Mapping Information

ALLIANCES

Eptura

Smarter facility decisions through unified design & operations data

- Greater cost savings & predictability from informed designs
- Fewer errors & improved schedules from data-driven decisions
- Unified insights from improved collaboration across project delivery
- Increased efficiency from BIM-enabled delivery into operations

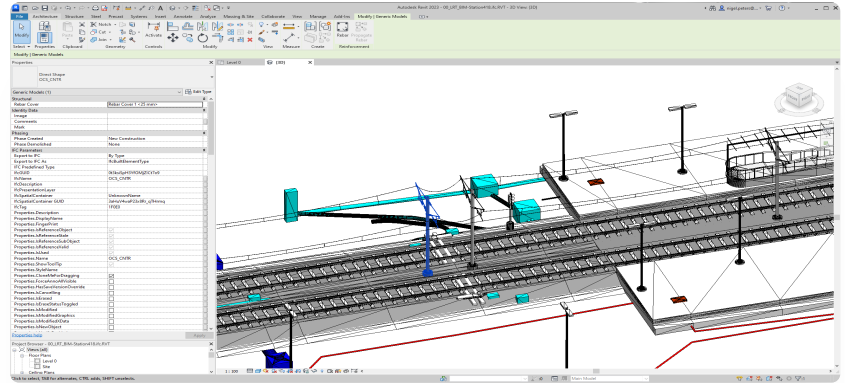


OPEN STANDARDS

BuildingSmart open data standards

Facilitating collaboration and coordination interoperability

- Enhanced, open schema definitions improve industry alignment
- Coordinated models across teams enable seamless delivery processes
- Optimize the project lifecycle by improved data access and sharing



ISO 16739:2024

The Next Transformation

The world is different today than 5 years ago



Unprecedented demand

- Sustainability and resiliency
- Demographic shifts
- Stimulus packages



Work has changed

- Remote work
- Material supply chain
- Industrialization



Accelerated Digitalization

- Data and tool explosion
- Digital twins requested by owners
- Automation and Generative AI

DIGITAL TRANSFORMATION

Global Environmental Trends

Buildings & Infrastructure



Energy & Carbon

- Bold action demanded by AEC, as biggest contributors to global GHGs
- Growing commitments to set, meet and report sustainability energy & carbon targets
- Increased regulations to reduce embodied carbon through rigorous Life Cycle Assessment



Resource Efficiency

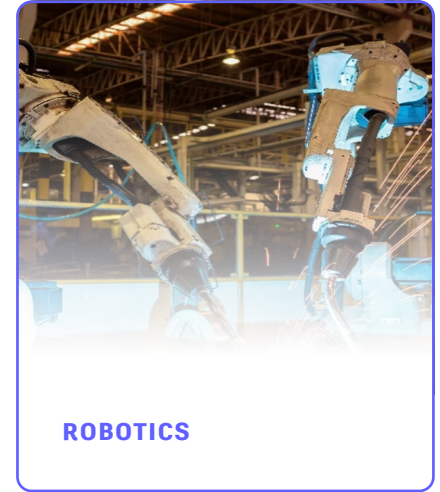
- Improve water conservation through plant, supply & distribution efficiencies
- Growing demand to reduce raw material consumption and construction waste
- Address existing building stock with circularity principles



Climate Resiliency

- Cost & risk management to combat increased storm events and draught
- Ensure durable infrastructure for resilient and sustainable cities
- Smart retrofit and renovation is a pressing reality for climate change adaptation and preparedness

Emerging trends in construction



Accelerated Digitalization – drivers for construction



Shortage of skilled labor



Sustained margin pressure



Need for data driven insights



Increase in regulation

Digital transformation is imperative in AEC

Design collaboration and management are crucial for success

The pandemic accelerated the adoption of digital solutions

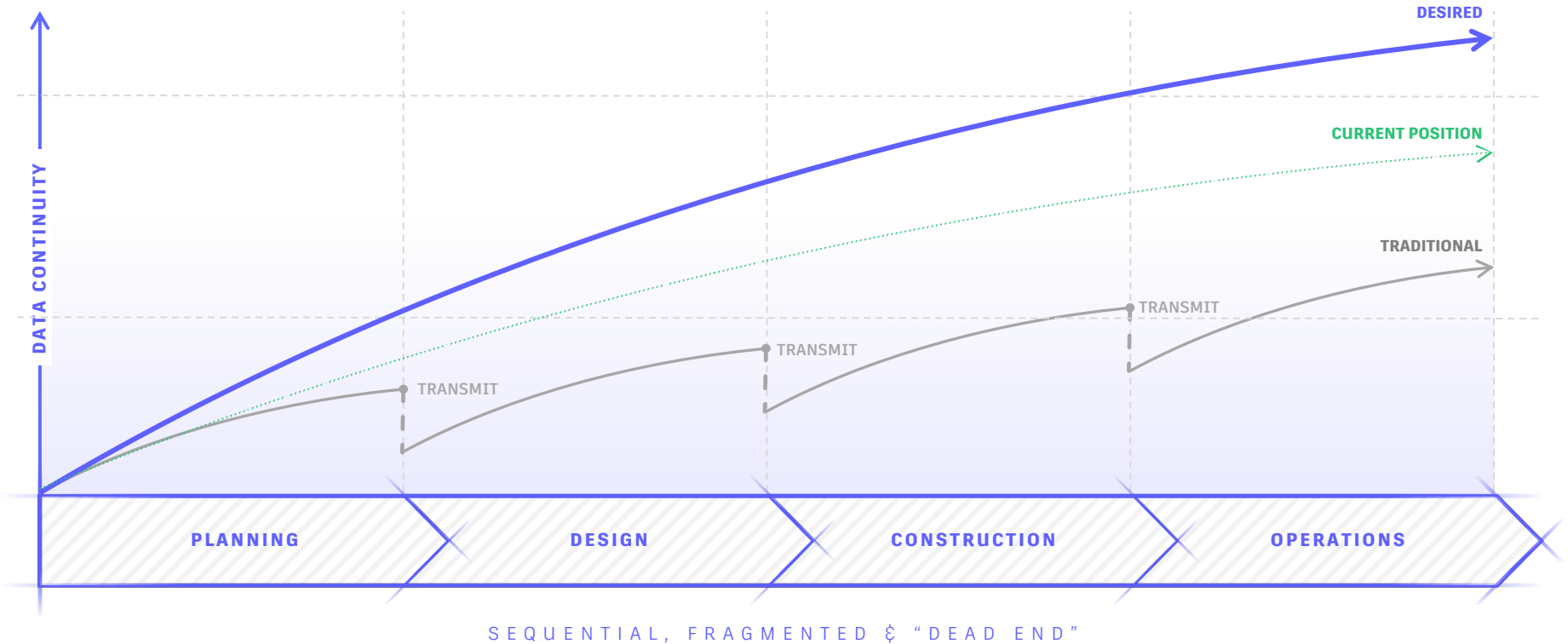
Anytime, anywhere access is critical for stakeholders

Accelerated timelines necessitates doing more with less

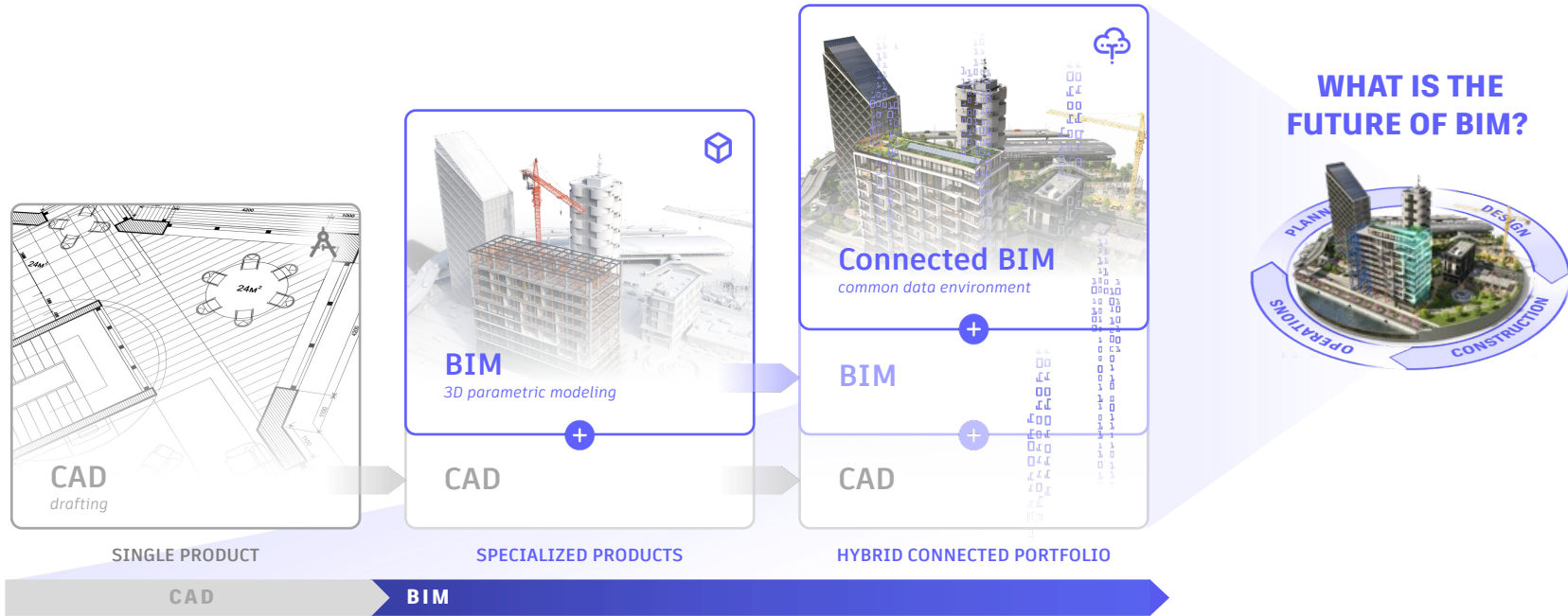


**UNLEASHING
THE POWER OF
THE CONNECTED
CLOUD FOR DIGITAL
PROJECT DELIVERY**

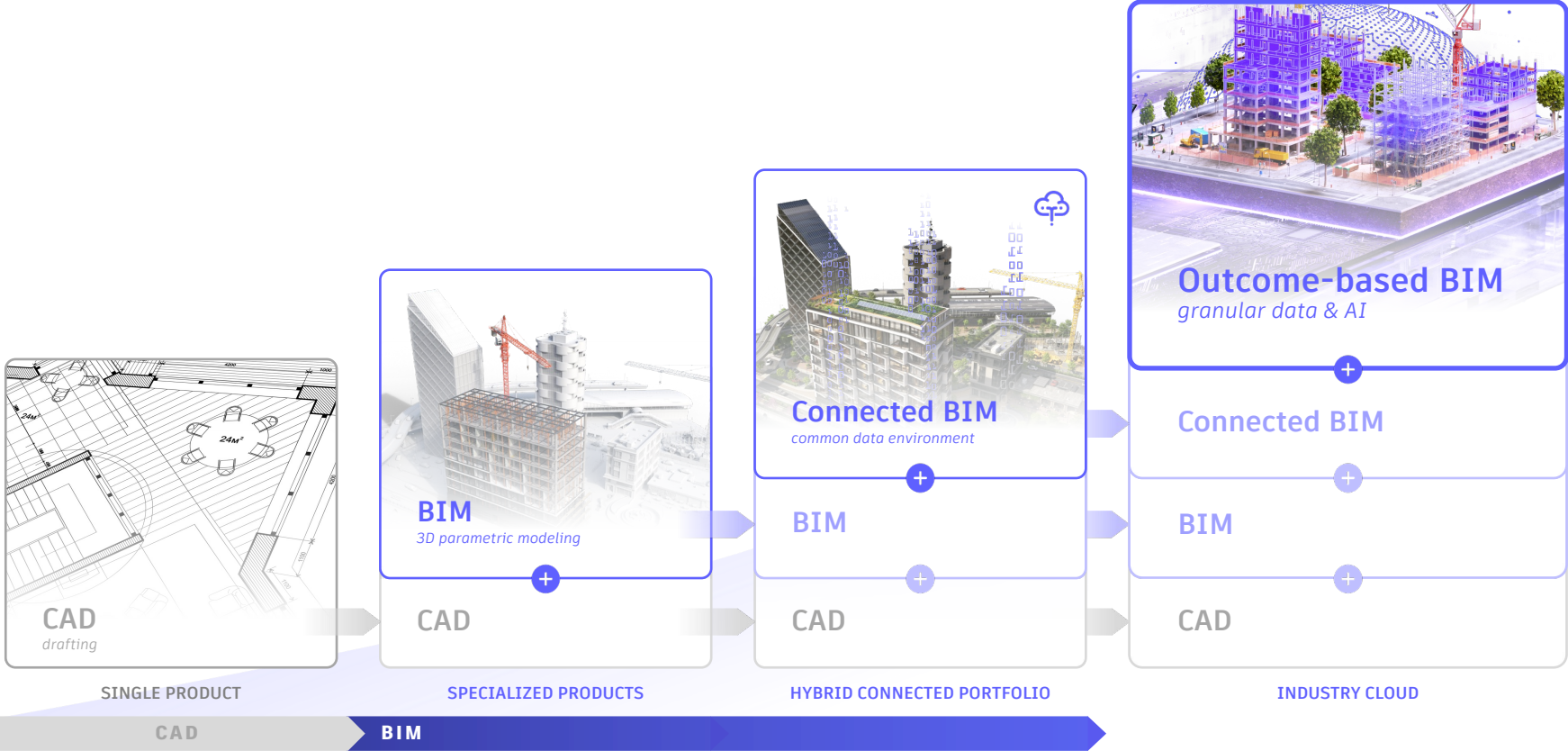
Connected data across the project lifecycle maintains data continuity and preserves critical information



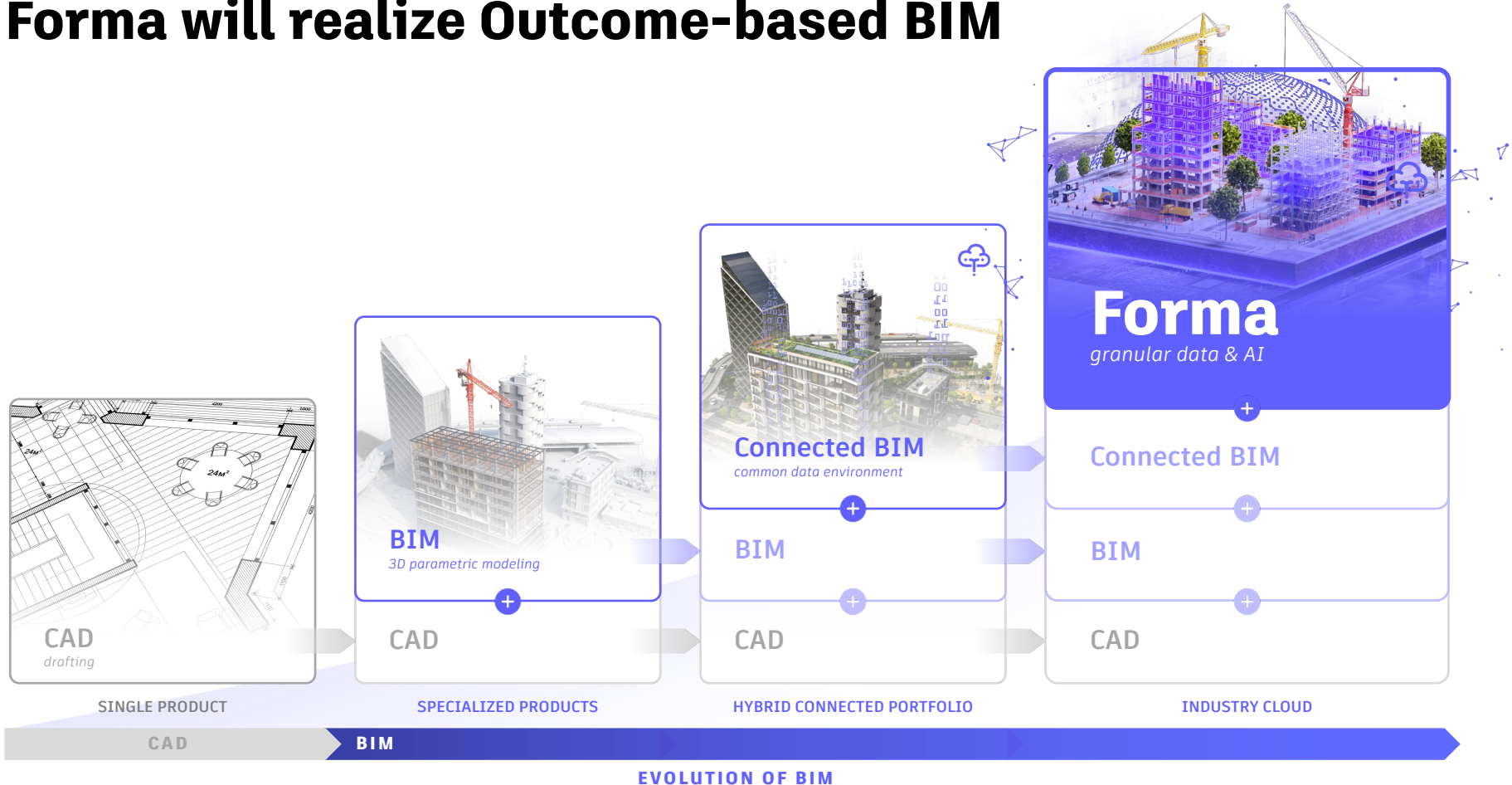
The Next Digital Transformation is coming



AEC Digital Transformation



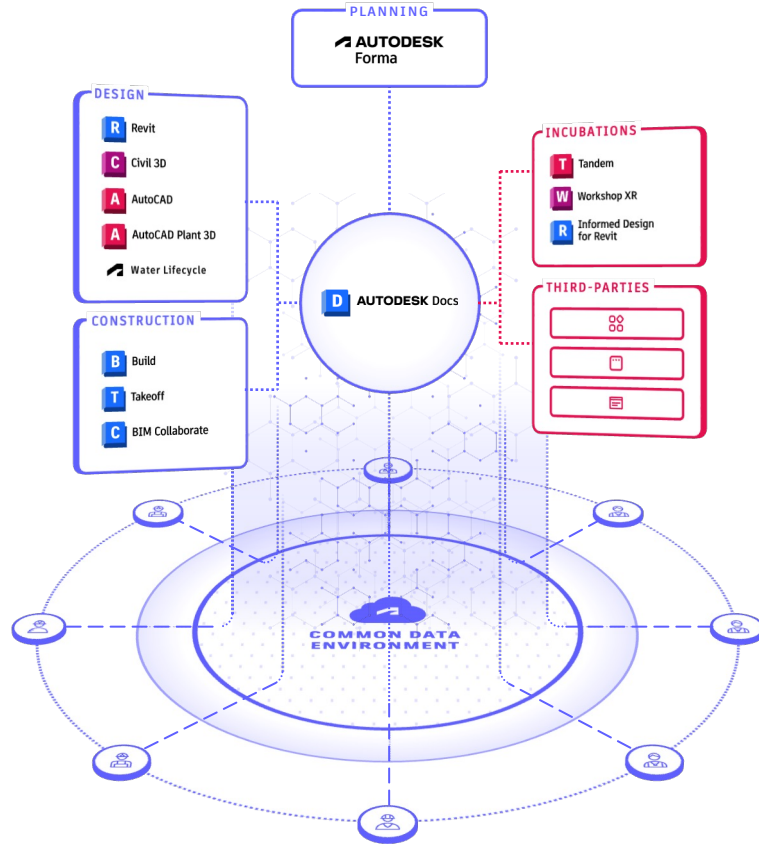
Forma will realize Outcome-based BIM



RECALL

Autodesk Docs is the CDE

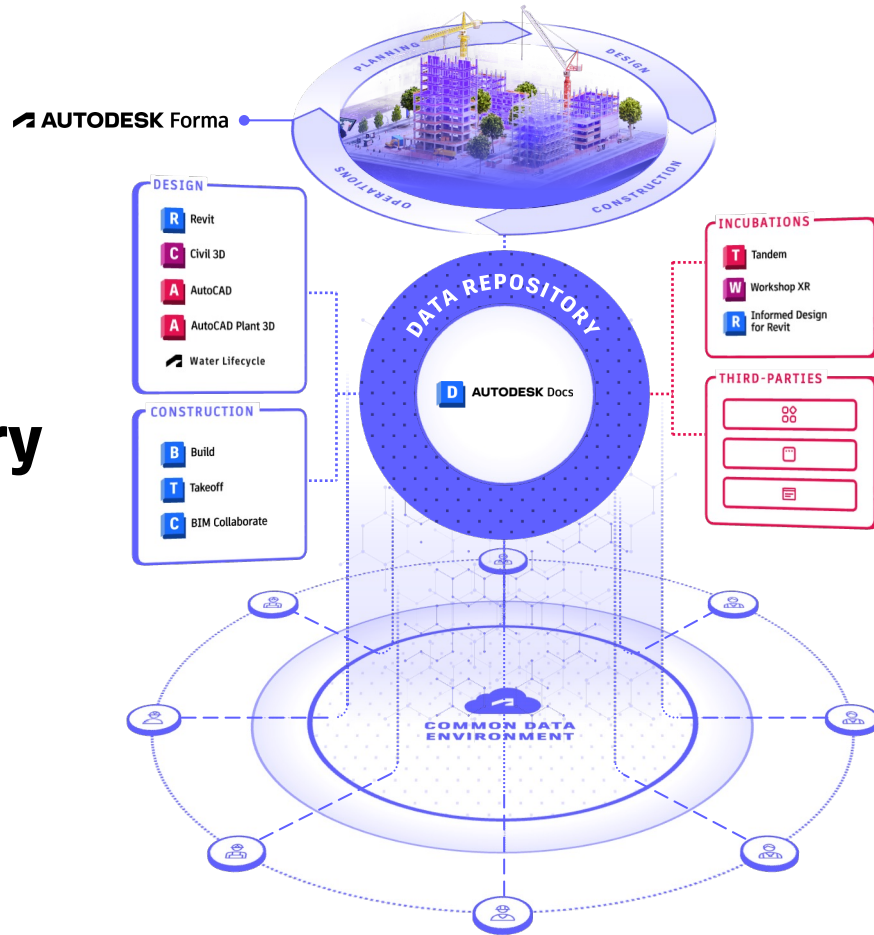
A single, cloud-based solution for storing and managing all project files and data across the lifecycle



Autodesk Docs is Forma's data repository

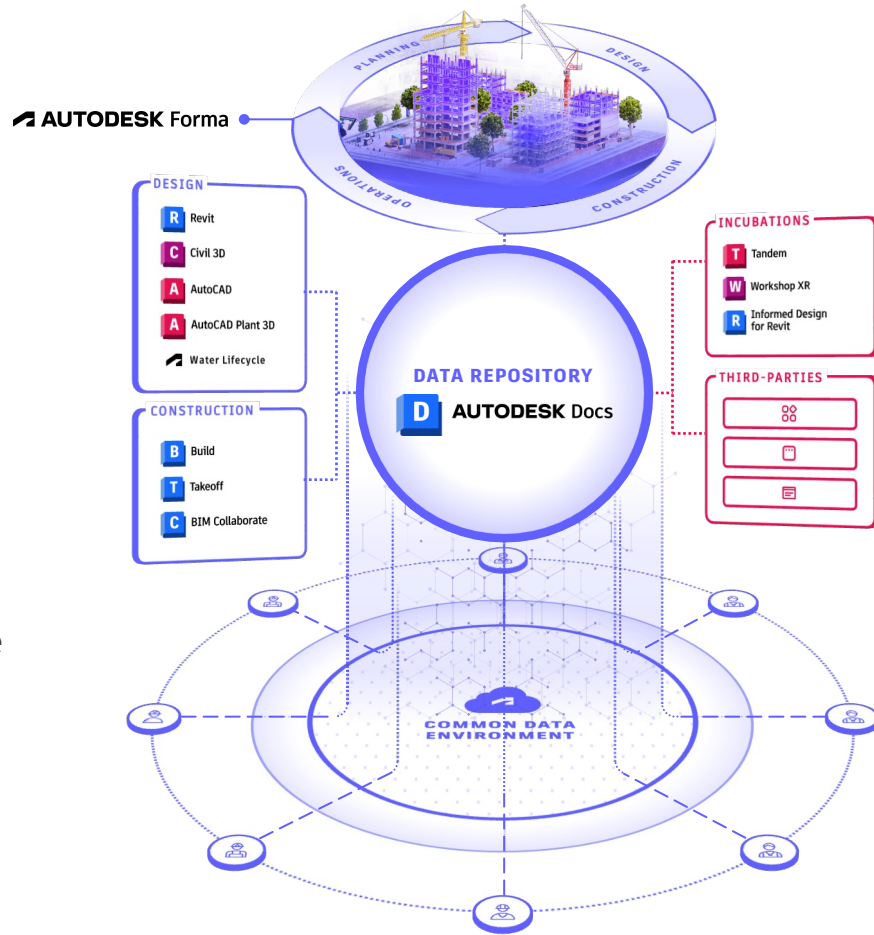
Expanded with more capabilities to
support files and granular data

On the right path if using Autodesk Docs



Expand capabilities with Forma and data

Forma will be the industry cloud for AECO that leverages data stored in Docs to enhance Digital Project Delivery through a collaborative environment that is scalable, open, and flexible



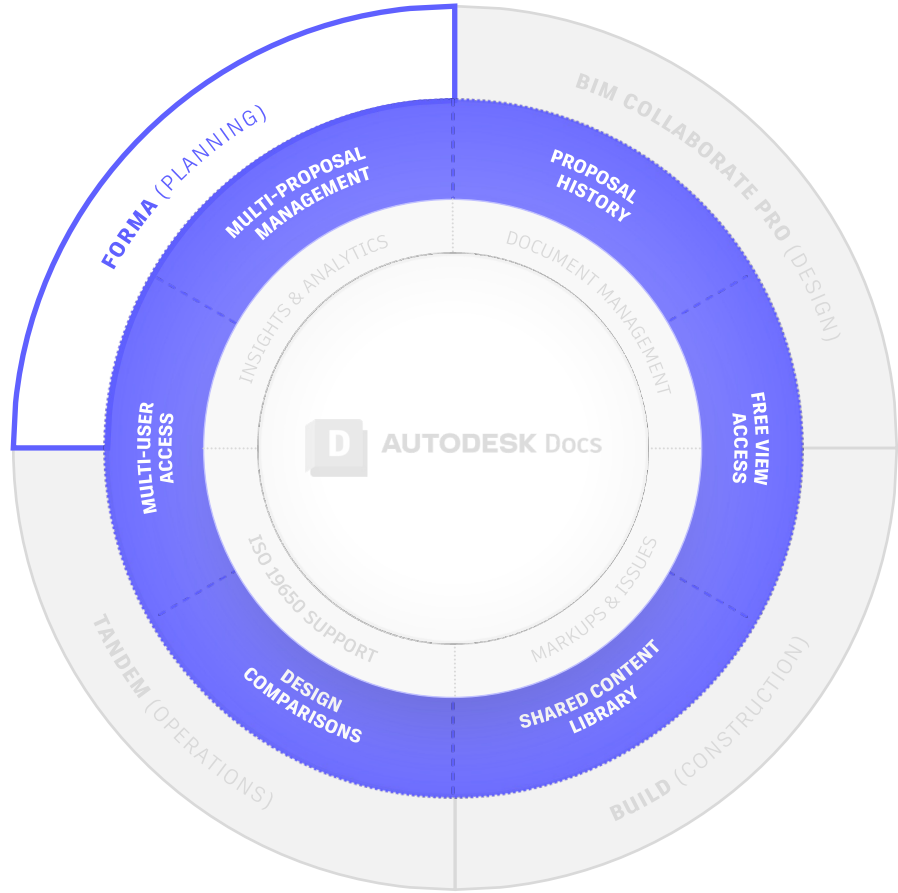
Forma supports the full lifecycle

Driving innovation and advancing cloud capabilities

 **AUTODESK** Forma



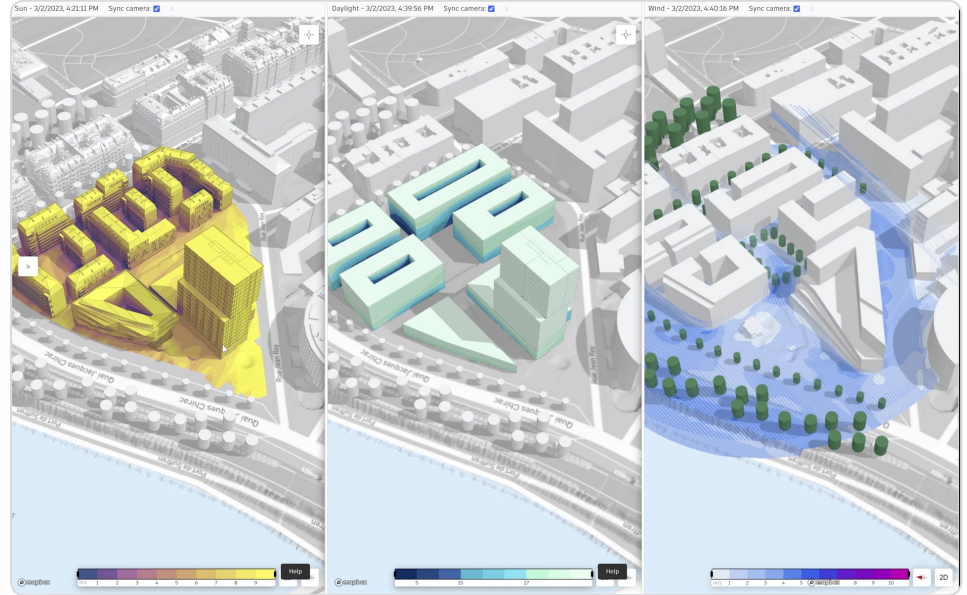
Forma supports collaboration & management for the Planning phase



PLANNING

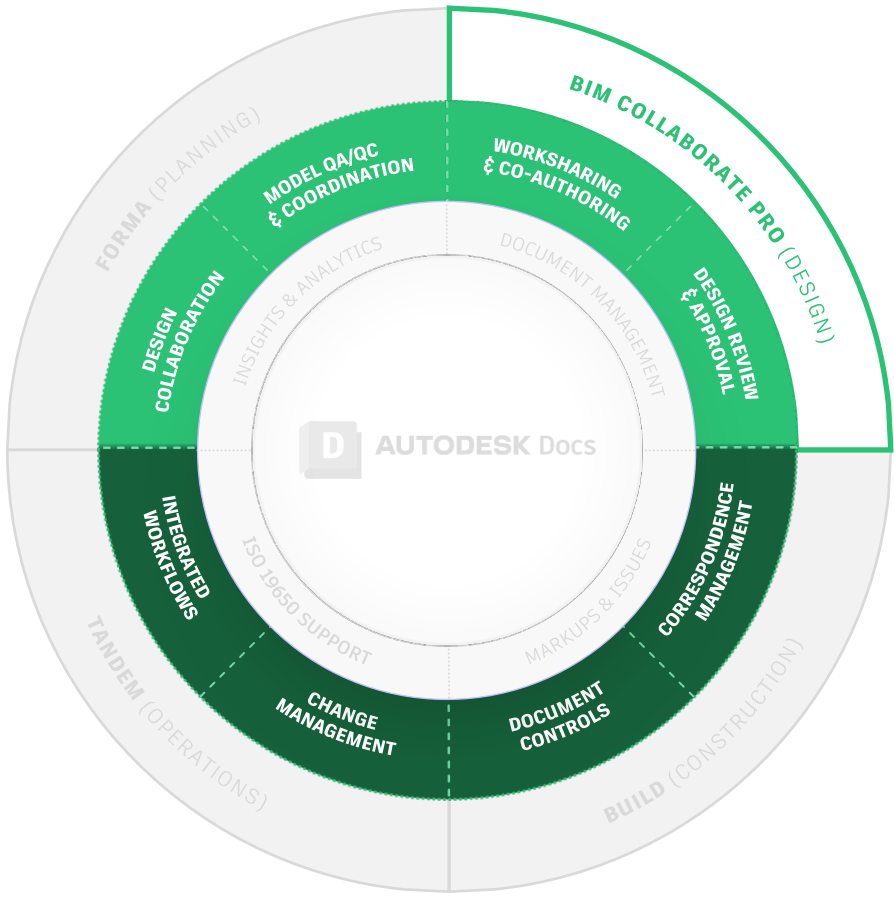
AUTODESK Forma **Reimagine** **early-stage planning**

- Accelerate early planning through cloud-based collaboration
- Uncover greater insights through data-driven tools for better outcomes
- Make informed decisions about building performance when it's most impactful



BIM Collaborate Pro enhances collaboration & management for the Design phase

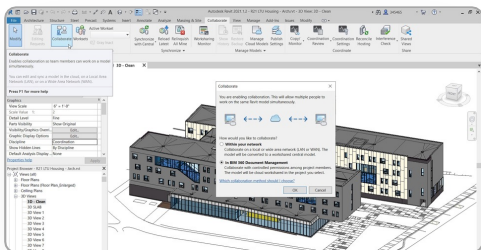
- DESIGN COLLABORATION
- DESIGN MANAGEMENT



Desktop Authoring

Facilitate worksharing and collaboration from the cloud

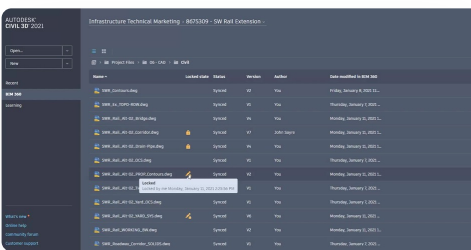
R AUTODESK Revit



Revit Cloud Worksharing

Collaborate seamlessly on Revit models in real time, anywhere, across teams

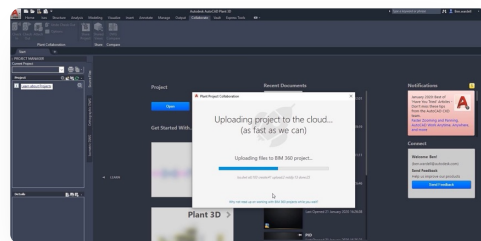
C AUTODESK Civil 3D



Collaboration for Civil 3D

Quickly workshare Civil 3D files, xrefs, and data shortcuts, from one cloud accessible location

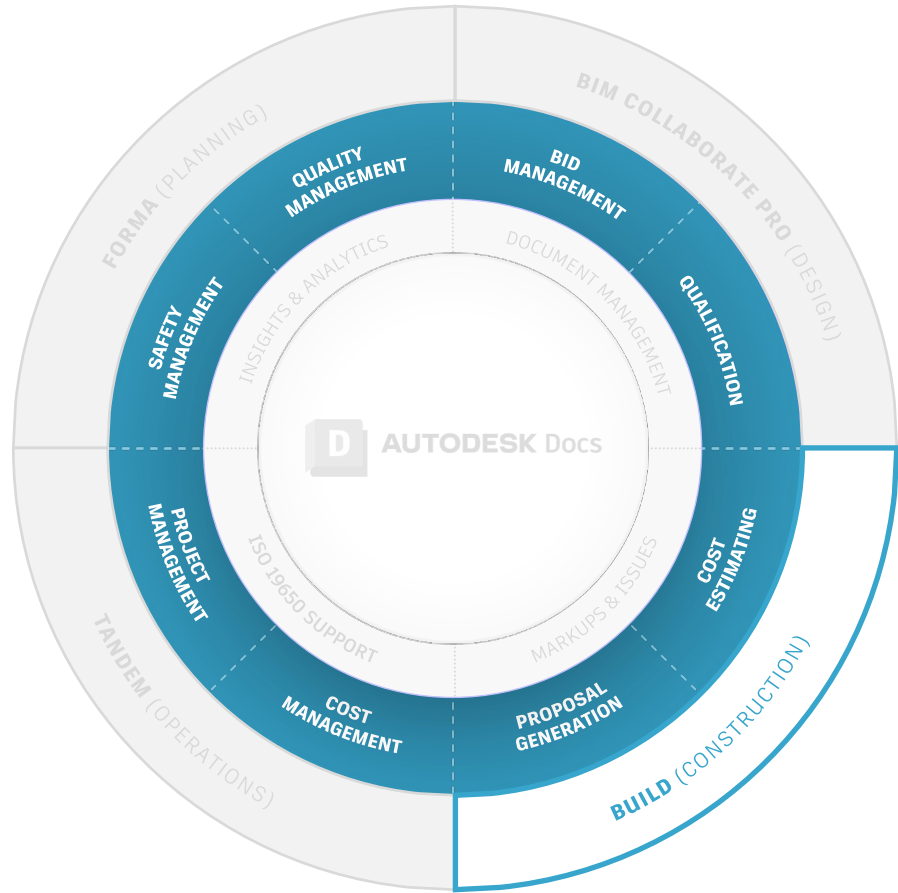
A AUTODESK AutoCAD Plant 3D



Collaboration for Plant 3D

Securely collaborate on Plant 3D files in a cloud-based environment

Build amplifies collaboration & management for the Construction phase



CONSTRUCTION



Connect field and project management workflows

- Enhance project efficiency and collaboration while minimizing errors and rework.
- Drive adoption of repeatable safety programs and foster site-wide ownership.
- Link project data to cost activities for root cause analysis and prioritize risks with Construction IQ

This screenshot shows the 'Seaport Civic Center' project dashboard. It includes a sidebar with navigation options like Risk, Design, Project Controls, Quality, and Safety. The main area displays 'Golden Gate Seaport Civic Center' with project dates from August 2020 to September 2023. Key sections include:

- RFI Risk Factors:** A grid of cards showing risk levels for High Risk RFIs (2), Design Coordination (1), MEP and Structural RFIs (4), Documentation Errors (6), and Code Compliance (1).
- Project Submittals:** A table listing submittals with columns for ID, Spec, Rev, Title, Type, and Due Date. It shows 5 of 9 submittals.
- RFI Progress Tracking:** A section for 'Active vs Closed' RFIs.
- Open RFIs and Submittals:** A summary of open items with a progress bar.
- Open RFIs by Current Assignment:** A breakdown of open items by assignee, such as 'David Engineers'.

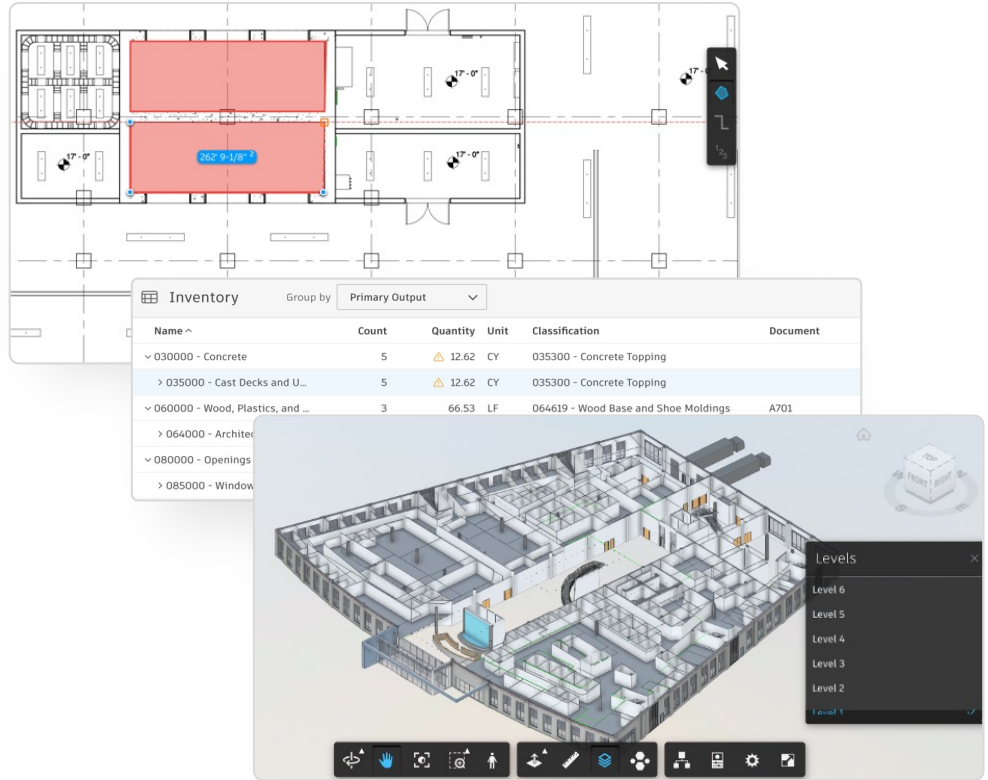
This screenshot shows a detailed view of a construction drawing review. On the left, a sidebar displays the 'In Review' status for a 'Missing Soffit Detail' by David Sanchez (Allied Architects). The main area shows a floor plan with a red box highlighting a specific area. A yellow checkmark icon is visible on the drawing, indicating a review action. The drawing includes labels for 'Break Rm 214', 'Office 213', 'Conference 212', and 'Conference 204'.

CONSTRUCTION

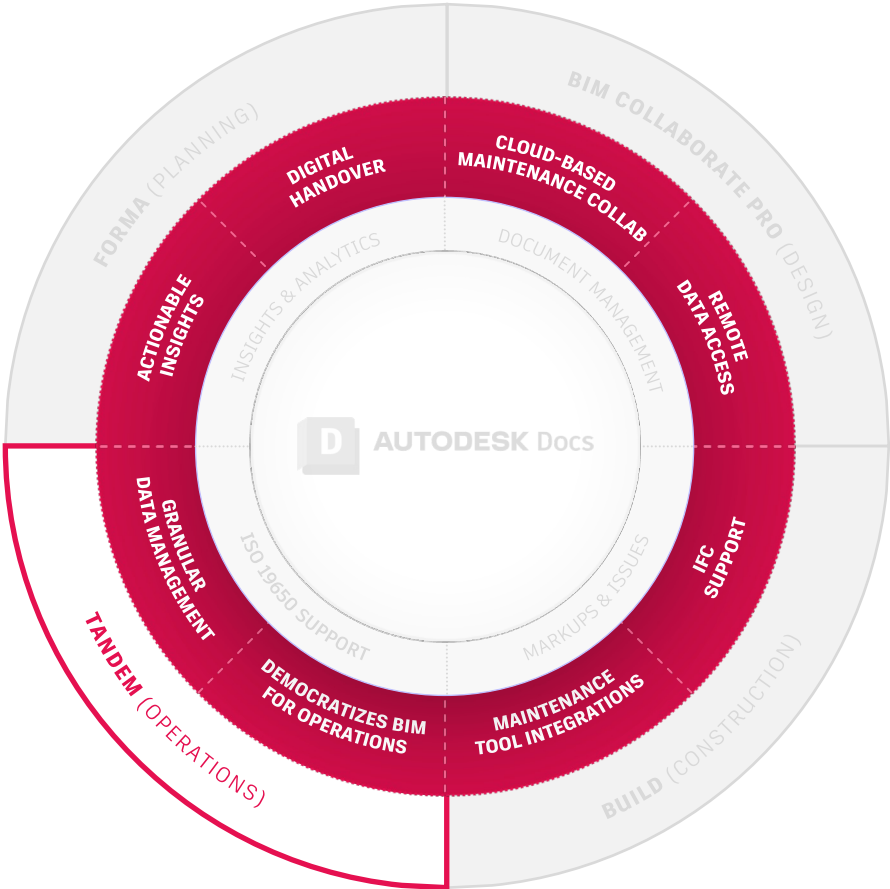


Accelerate bids with accurate 2D & 3D quantities

- Centralized project estimate data for end-to-end visibility and accuracy
- Streamlined, flexible 2D and 3D takeoff process eliminating siloed solutions
- Enhanced risk visualization, repeatable processes, and bid accuracy



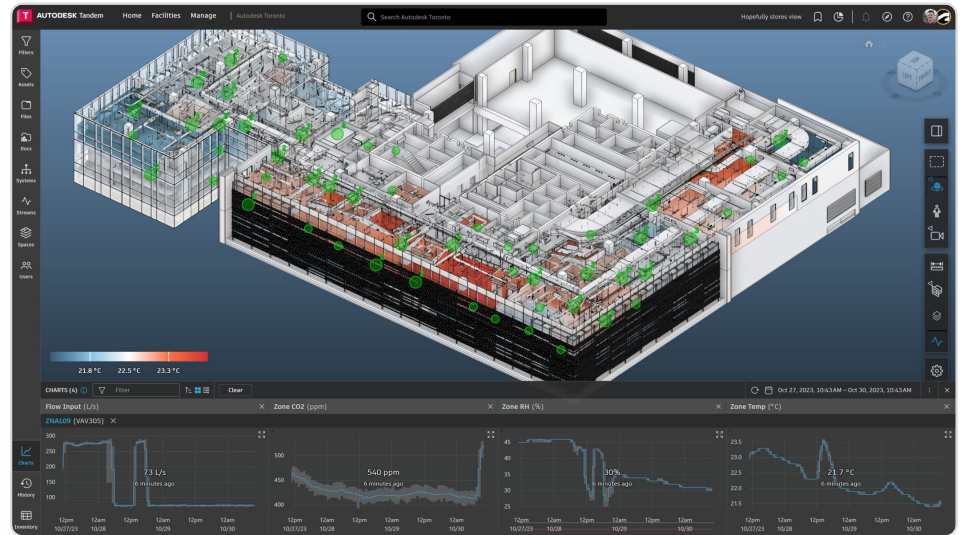
Tandem enables collaboration & management for the Operations phase



DESIGN (NEW)

Create digital twins with Tandem for AEC

- Empower AEC firms to build and deliver digital twins for project delivery engagement
- Support building owners early in the lifecycle with operations planning and facilitate handover
- Access through future entitlement with Autodesk BIM Collaborate Pro





Harnessing BIM to realize Digital Twins

- Leverage Digital Twins for business innovation & growth
- Simulate, predict, and inform with connections to operations systems & data
- Path to comprehensive and autonomous twins



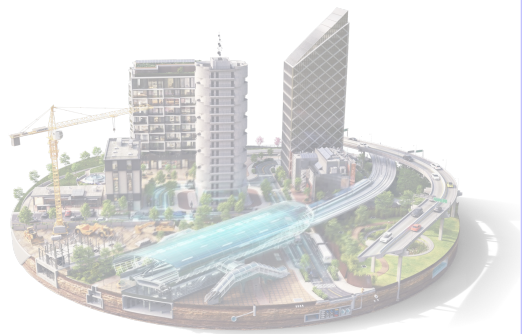
Digital Project Delivery Strategy



Design Collaboration

Facilitating Multi-Disciplinary Design

- Integrate desktop CAD & BIM seamlessly
- Enable design review & approvals
- Enhance model QA/QC & coordination



Design Management

Managing Information & Processes

- Empower data management & controls
- Facilitate integrated & agile processes
- Leverage data-driven insights



Digital Project Immersion

Redefining Design Innovation

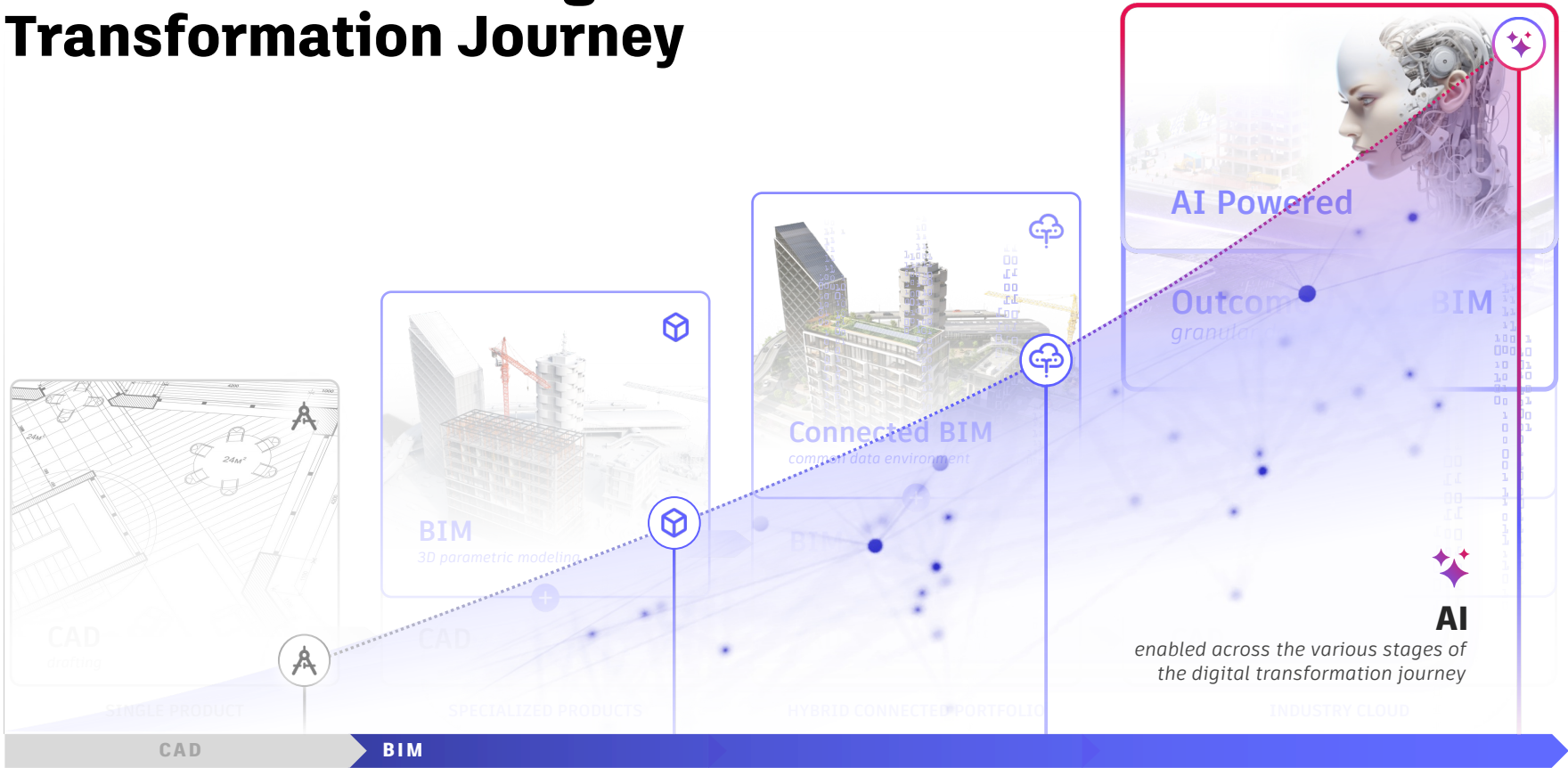
- Accelerate outcome-based BIM
- Unleash AI-enabled capabilities
- Cultivate immersive experiences

Accelerate Outcome-Based BIM into Future

BIM-based processes continually optimize workflows using real-time data for better outcomes, pair with advanced computational design techniques to push boundaries of innovation





AI across the AEC Digital Transformation Journey



3-pillars of AI



AUTOMATE



AUGMENT



ANALYZE

FOR CAD, BIM, CONNECTED BIM AND OUTCOME-BASED BIM



HUMAN & AI CO-CREATION

AI Augmented Design Collaboration

An AI assistant in virtual design meetings can generate 3D models in real time to visualize design changes and improve collaboration.



AI Automated Design Management

An AI-powered design review tool streamlines collaboration by catching errors, suggesting improvements, assigning tasks, and generating reports, all to ensure faster, more accurate, and efficient design processes.

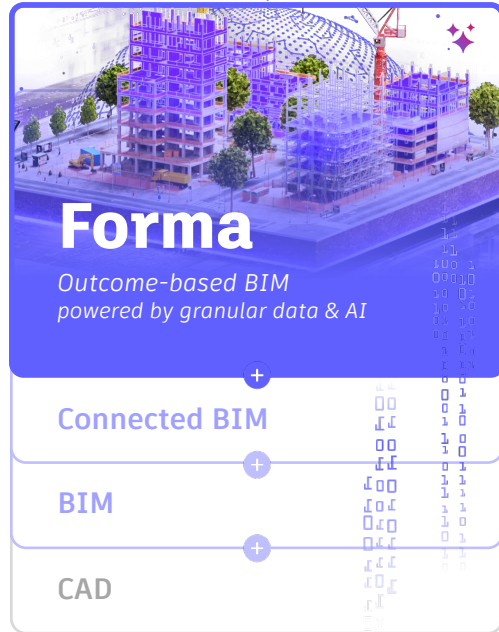


Immersive Design Collaboration

Global construction teams using holographic technology and AI can collaboratively design buildings in real-time, optimizing costs, schedules, and sustainability.




Forma will enable new ways of working




INDUSTRY CLOUD

HARNESS THE POWER OF DATA AND AI TO DO MORE WITH LESS


A 3D architectural rendering of a city or industrial site with blue lines and paths overlaid on a grey base map, representing an outcome-based BIM process.

 Outcome-based BIM Process

A 3D visualization of a blue wireframe mesh, representing connected granular data.

 Connected Granular Data

A photograph of three people sitting around a table, looking at a laptop. Overlaid on the image is a blue cloud icon with a network of white nodes and lines, representing an open ecosystem.

 Open Ecosystem

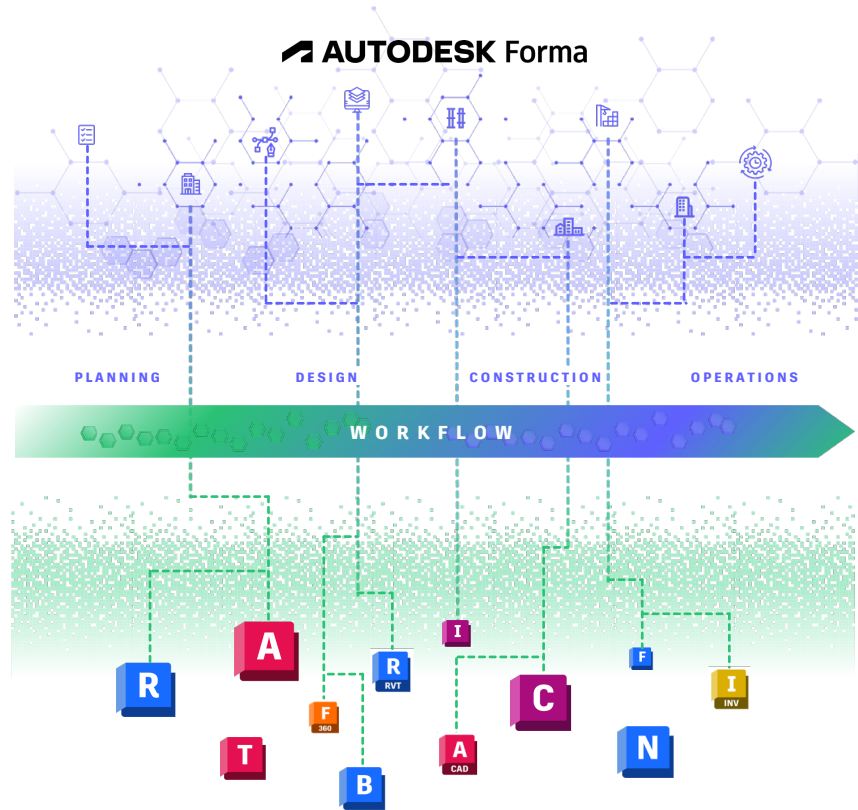
Outcome-based Approach

Start the design process by focusing on the outcomes for the users, community, & environment



As we expand, Hybrid Workflows will continue to be key to bring along our base

Enabling customers to work in a hybrid environment with existing products and workflows augmented with Forma capabilities for others



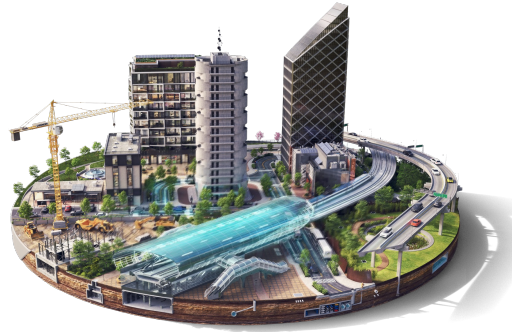
Summary

Digital Project Delivery



Design Collaboration

Harness the power of the connected cloud to enhance teamwork & efficiency



Design Management

Leverage advanced cloud to manage information & streamline processes

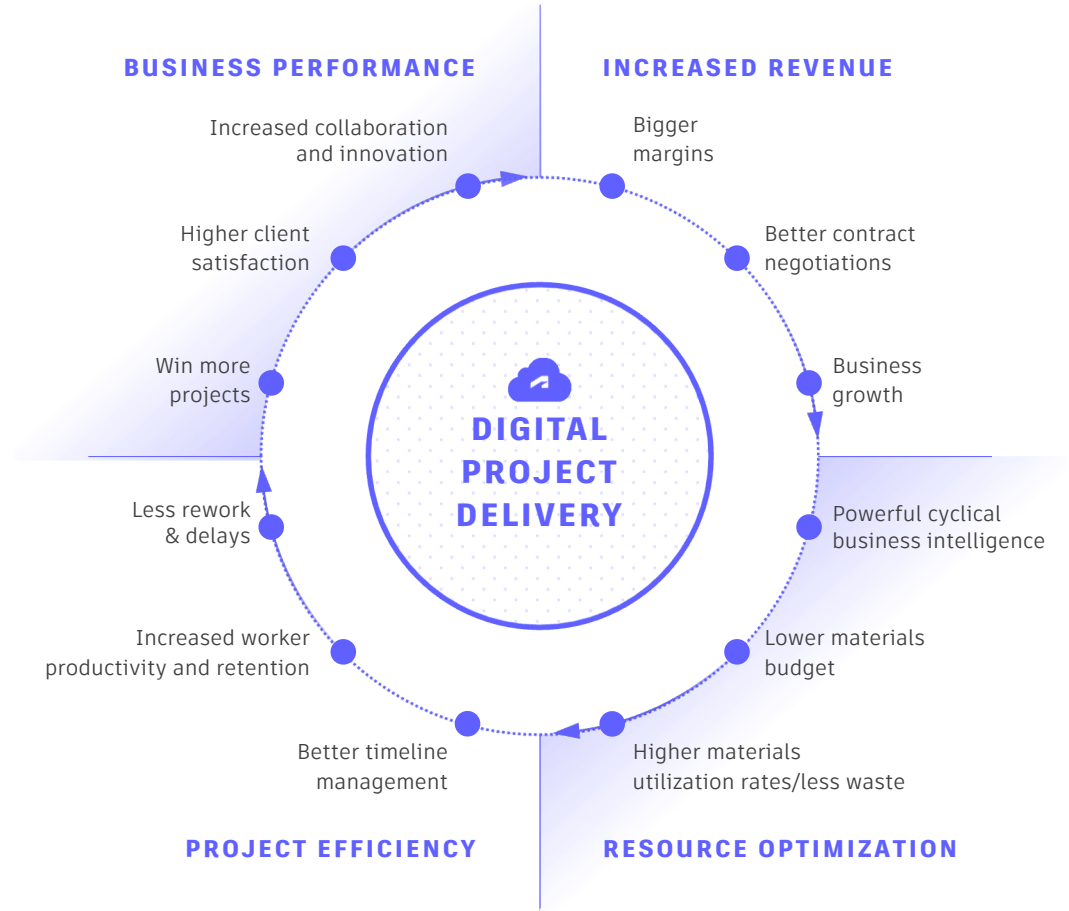


Digital Project Immersion

Embrace design innovation to shape the future of digital project delivery

Value Drivers

Across the project lifecycle, the connected cloud drives innovation, automation, and performance to achieve greater outcomes with less



Unleashing the potential

Elevating design collaboration and design management into the future

- ✓ Outcome-Based BIM Processes
- ✓ AI-Driven Optimization
- ✓ Immersive Visualization
- ✓ Granular Data Workflows



Power of Digital Transformation

- Digital transformation requires changing mindsets & processes
- Adapting to change is crucial for success with digital project delivery
- Preparing for the future means staying ahead of emerging technologies



**The time is now,
seize the opportunity
to revolutionize
digital project delivery
with innovation**





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