Investor Webcast 2013

Architecture, Engineering & Construction BIM Opportunity Update

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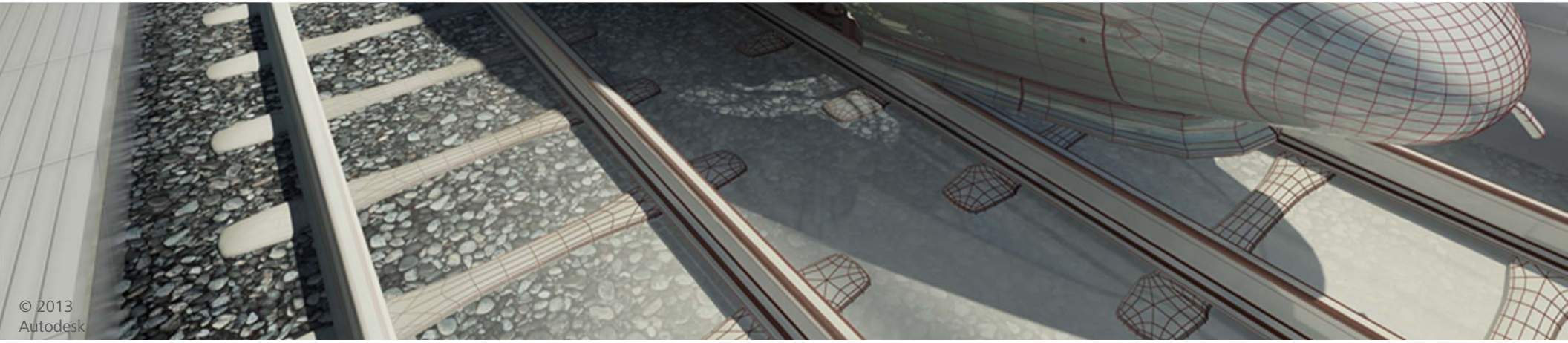

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Architecture, Engineering & Construction BIM Opportunity Update

Amar Hanspal

Sr. Vice President, Information and Platform Product Group

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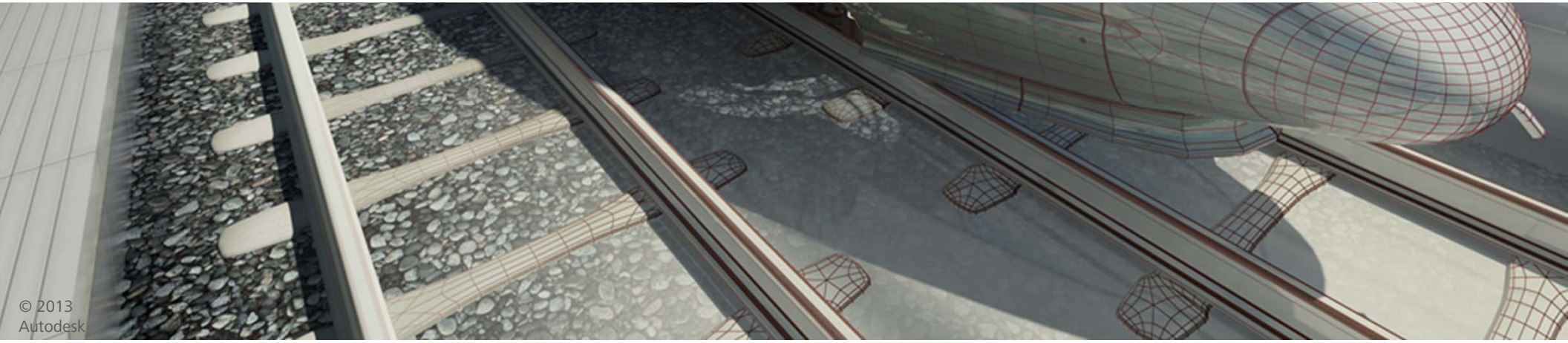
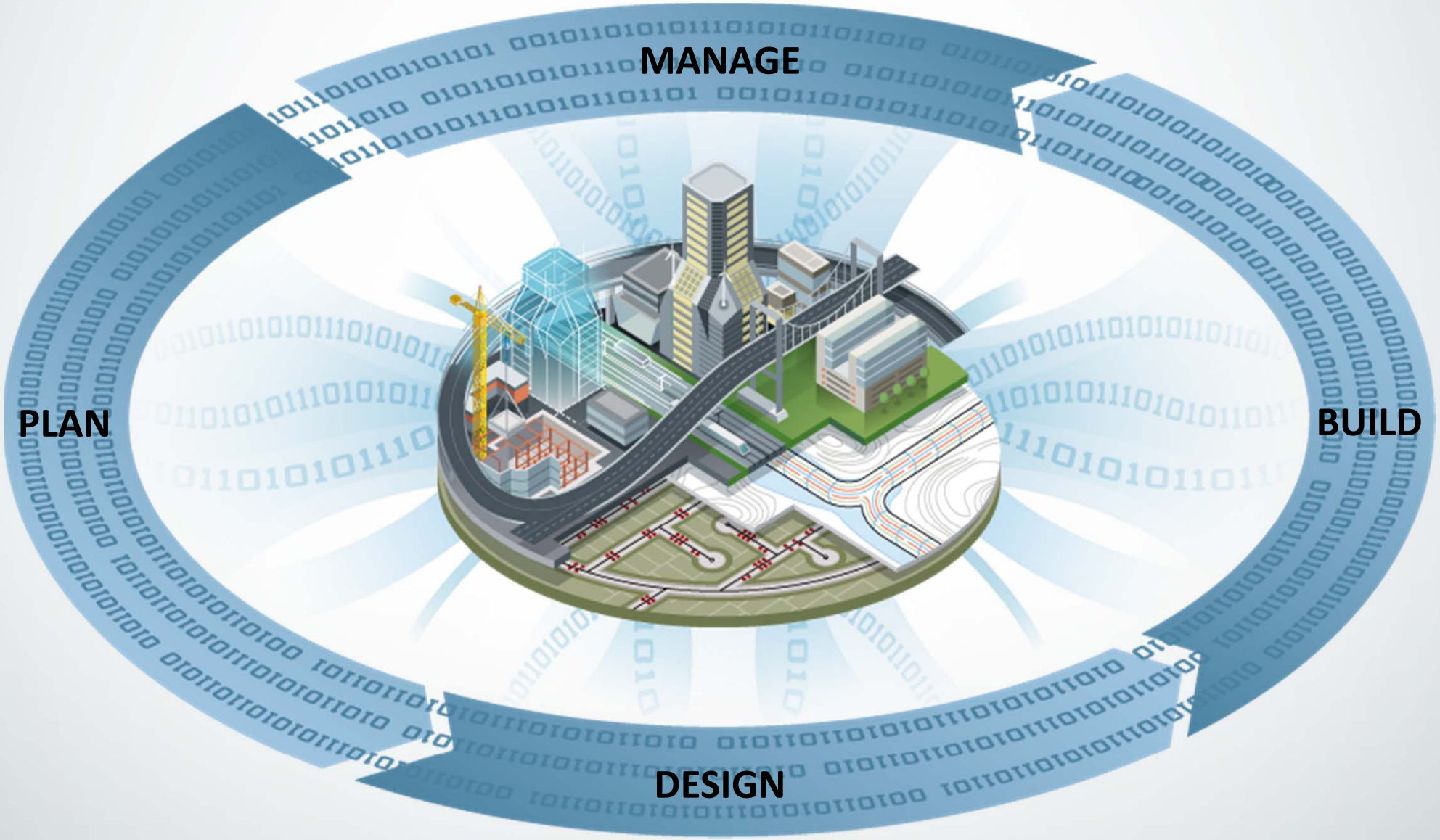


Building Information Modeling (BIM)



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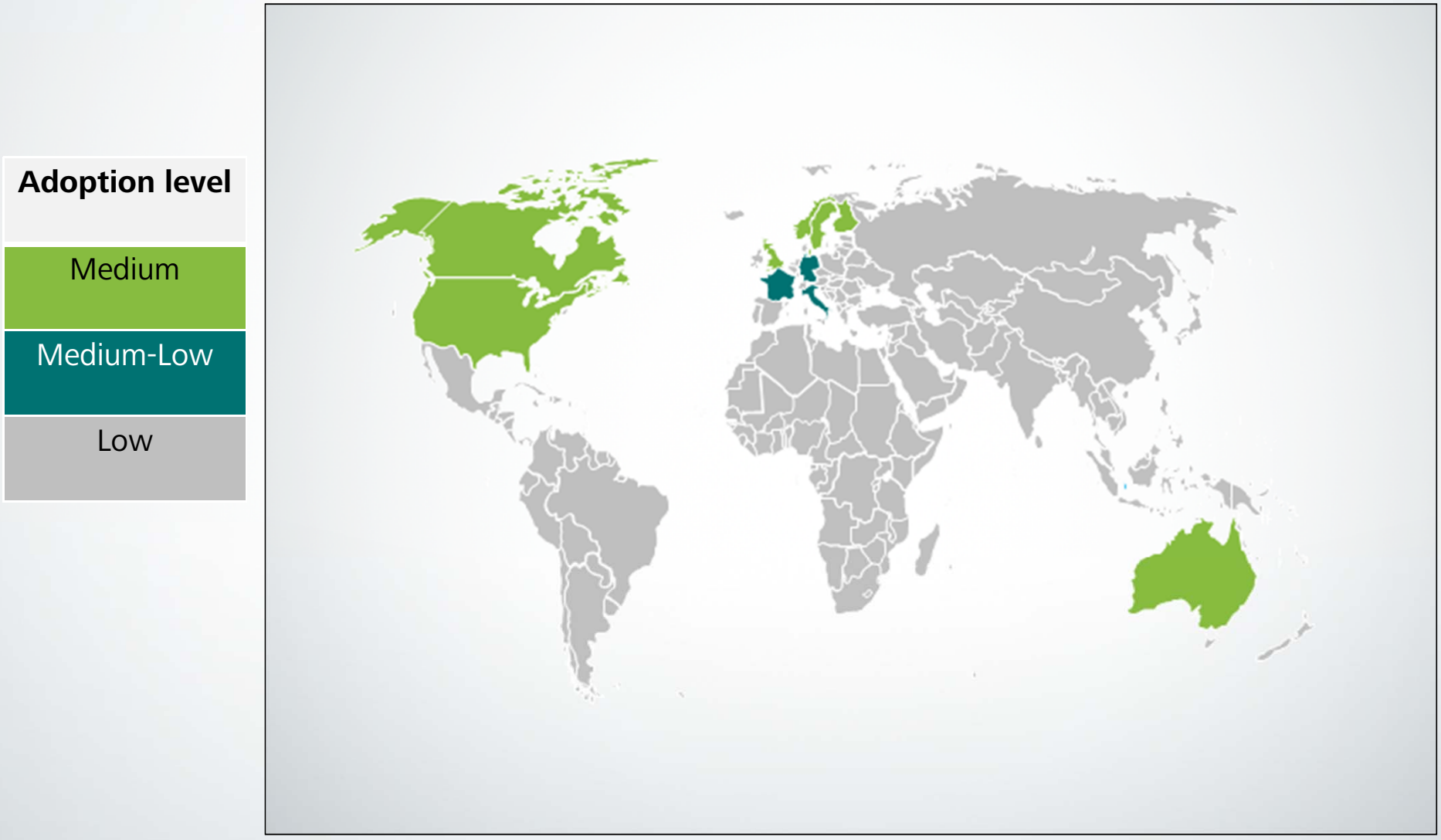
BIM Adoption Level by Geography



Source: Autodesk

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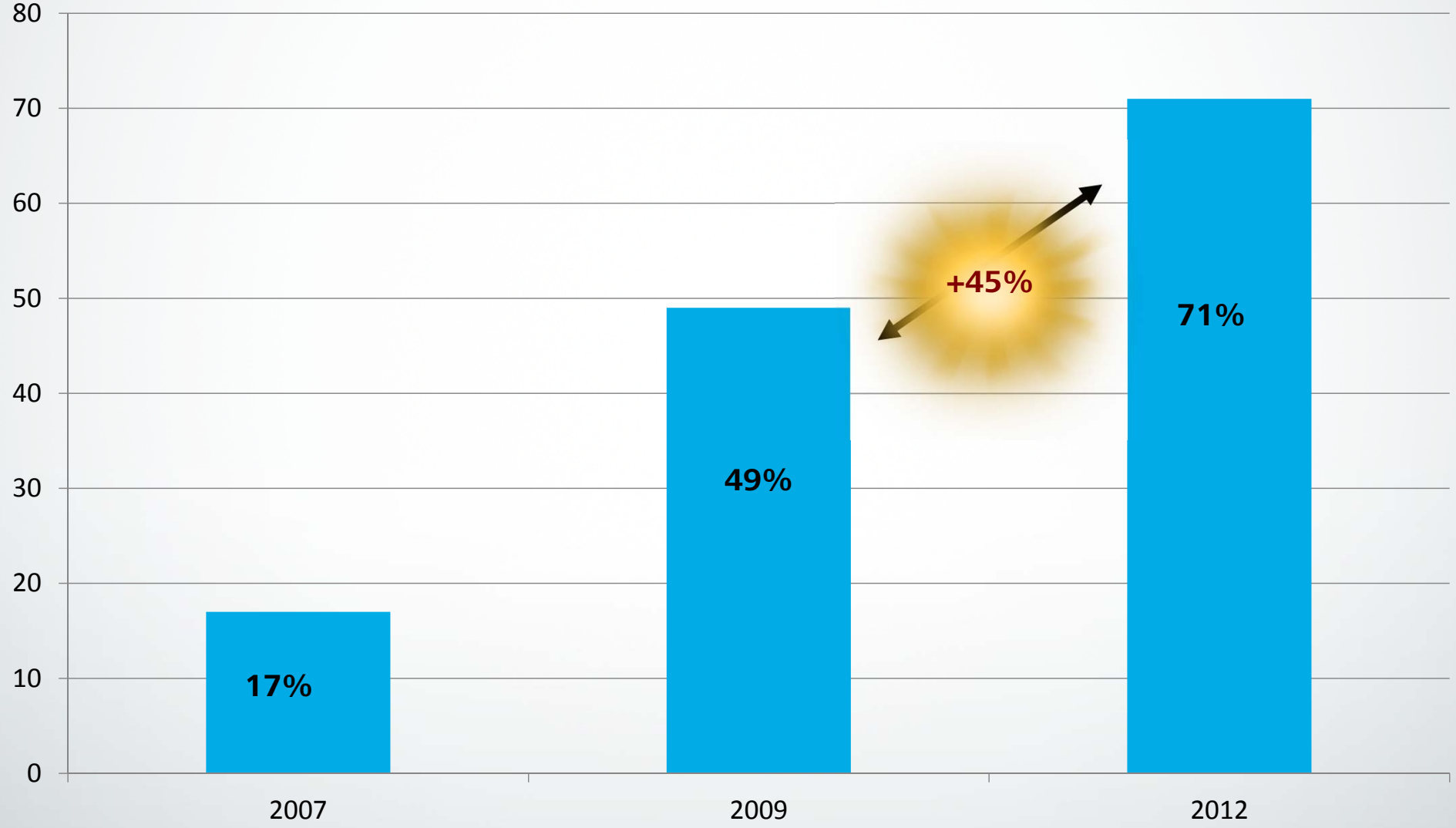
BIM in North America Grows

Despite economic downturn between 2009-2012, the number of firms engaging in BIM grew by 45%.



Source: Smart Market Report by McGraw Hill Construction, 2012

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Global BIM Mandates/Standards Across Industries

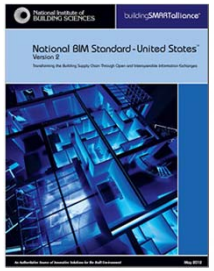
New York Port Authority

Denver International Airport

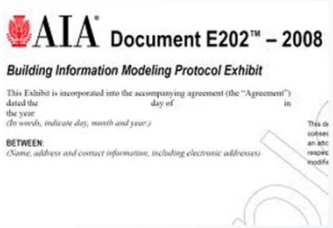
Qatar Rail / ASHGAL

US Army Corps of Engineers

United States Dept. of Transportations



NBIMS



AIA E202

BIM Designed In Projects

McGraw Hill CONSTRUCTION Dodge Lead Center

Power Ranking by Owner Type

Owner Type	Sum of Value
Private	$258,214,989,826
Local Government	$77,008,341,140
State Government	$34,980,286,641
Federal Government	$7,394,712,430
Military	$2,672,113,841
Grand Total	$380,270,443,878

Revit in Spec	3.20%	$6,125,416,015
BIM in Spec	0.36%	$1,195,177,841
BIM in Spec, Revit in Spec	0.08%	$883,469,931

constructionpoints Powered by Ingenium — Autodesk

Main | Project summary | Company summary | Search projects | Search companies | Tasks | Appointments

Stephen Rines February 21, 2013

Lead management | Project summary | Total | Updated today | Updated since last sign in

View activity report
Manage products
Manage searches
Manage field templates
View download list
Edit my profile & password

	Total		
Archicad Spec	20	2	4
Autodesk in Spec	1614	38	166
Bentley in Spec	549	8	36
BIM in Spec	3091	80	318
Civil 3D in Spec	152	6	37
Genivar	0	0	0
Graphisoft Spec	0	0	0
LEED	5743	72	454
Microstatn Spec	780	26	117
Revit in Spec	5089	138	771
Tekla in Specs	23	3	4
Vela in Spec	7	1	2

	Total
BIM in Spec	3091
Revit in Spec	5089
Civil 3D in Spec	152
ADSK in Spec	1614

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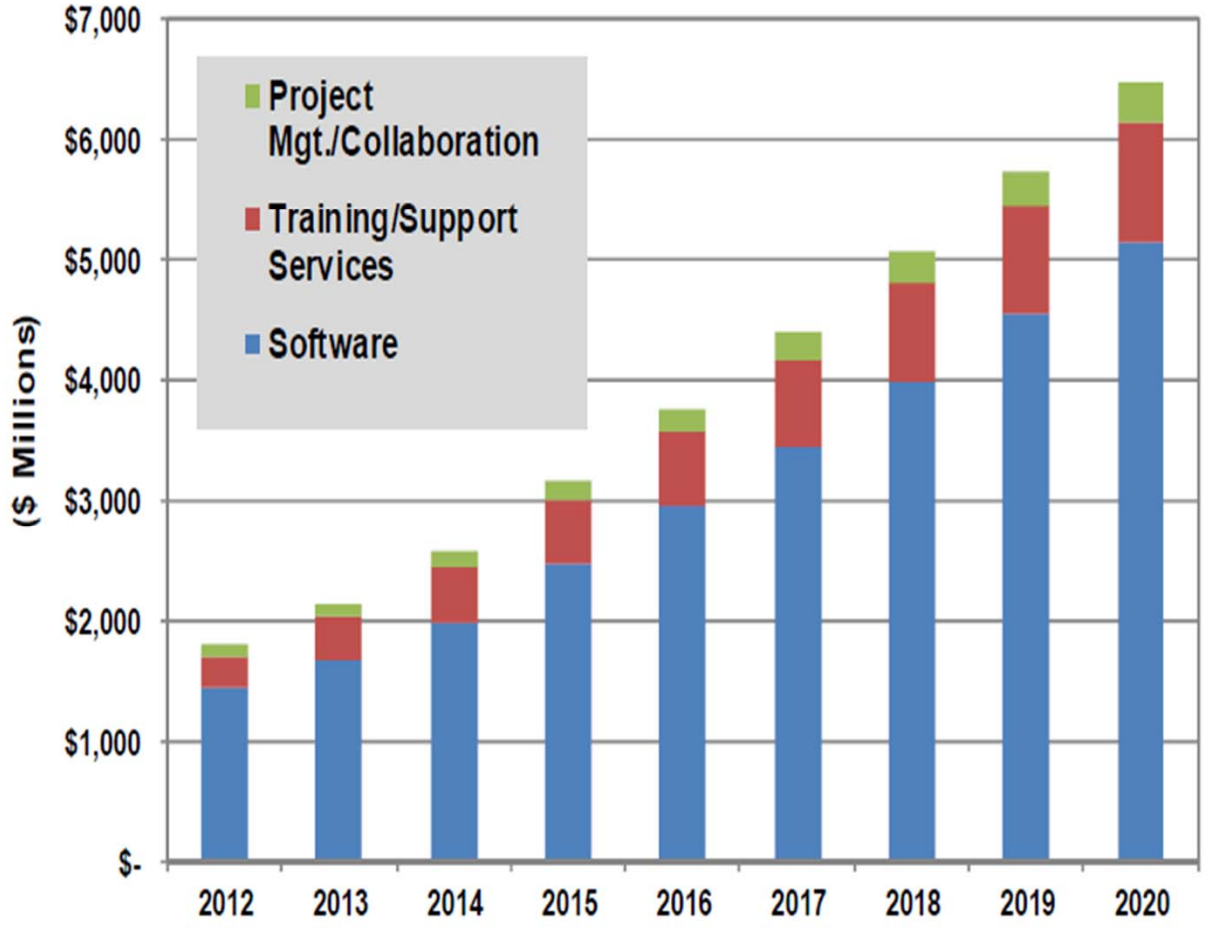
BIM Software Spend 2012-2020

Chart 5.4 ***Building Information Modeling Revenue by Market Segment, World Markets: 2012-2020***



(Source: Pike Research)

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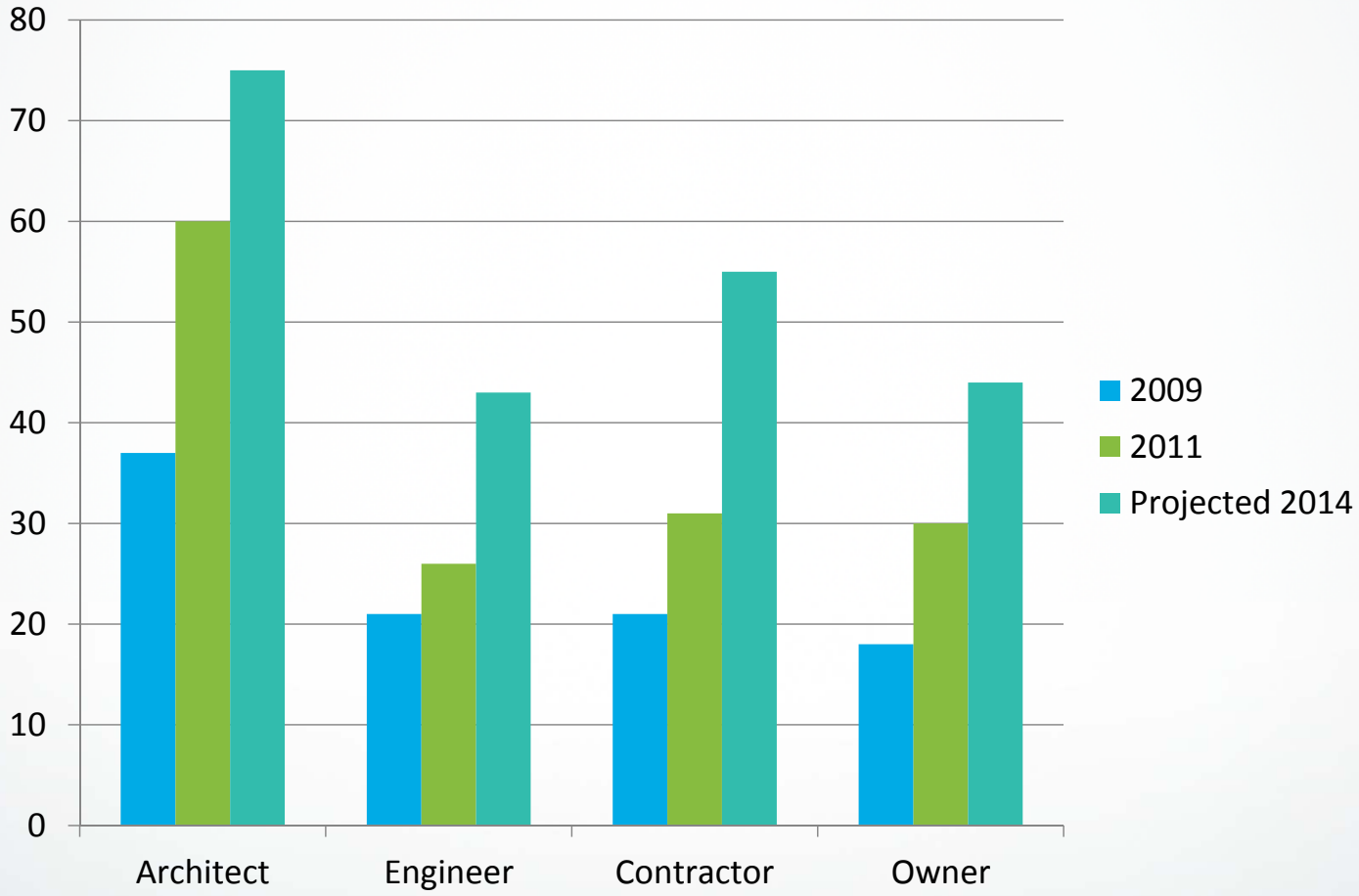
Autodesk AEC Suites

26% Revenue Growth in FY13

BIM Adoption Level by Discipline



Source: Smart Market Report by McGraw Hill Construction, 2012

>60% of projects

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SHoP Architects: Botswana Innovation Hub

Project:

- 350,000-square-foot office and research center
- Symbol of countries commitment to innovation
- Sustainability options: living roof and shaded courtyards

Why Model-Based Design:

"We relied on BIM and the software in the Building Design Suite to help us model our ideas. Autodesk® Revit® Architecture was our primary design tool. It helped us explore ideas and engage with the design team—and the architectural community in Botswana—in ways that advanced the vision of the project."

William Sharples
Principal, SHoP Architects

Results:

- Early understanding of design intent
- Advanced visualization of material use
- Client designated changes ready by the next morning

Image courtesy of SHoP Architects

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Heapy Engineering: Mercy Health's West Hospital

Project:

- Design all of the MEP/fire protection systems for Mercy Health's new 250-bed West Hospital, a greenfield project being constructed on a 60-acre campus

Results:

- Give large "light wells" a dual purpose as critical fresh air intakes and relief air discharge for the hospital
- Build a large portion of MEP systems for the250-room patient tower in a warehouse off-site
- Help the contractor reduce construction time on the project by several months

Why Model-Based Design:

"Autodesk Revit allowed us to communicate detailed design with the entire team efficiently."

Joe Ferdelman
Sr. Principal, Heapy Engineering

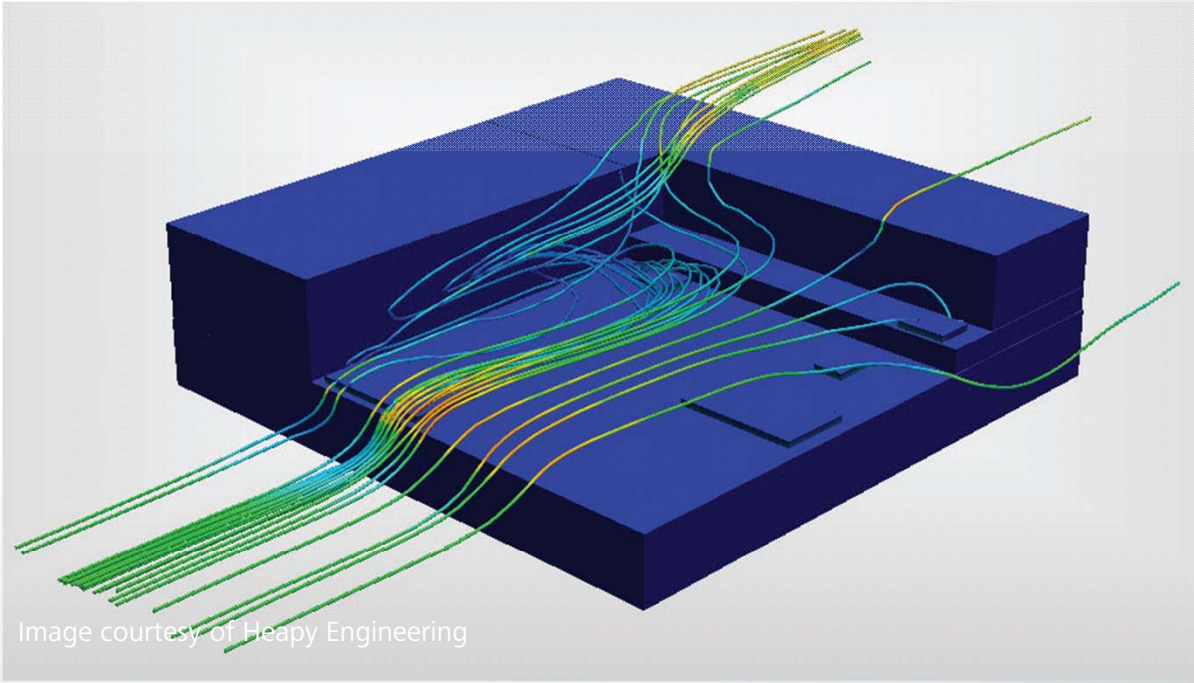

Image courtesy of Heapy Engineering

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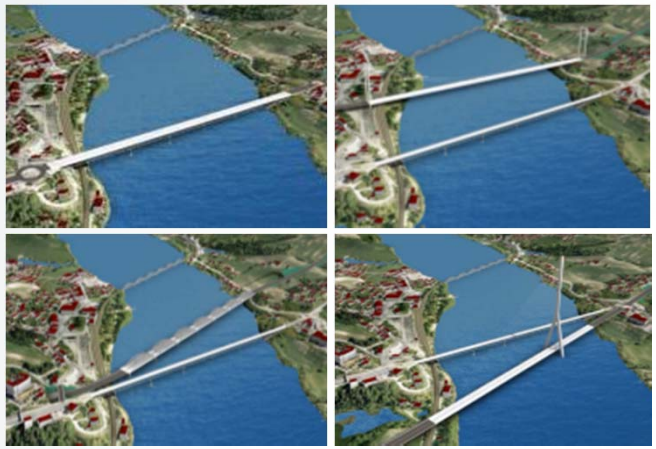
BIM for Infrastructure Drivers



Reduce Risk

Optimize Designs

Attract Private Investments

Increase Capacity

Images Courtesy of Multiconsult, A.S. Norway

Wisconsin DOT: USH 10 Expansion

Project:

- 3.7 miles - $14.6 million
- New divided 4-lane highway
- Part of $275 million corridor

Why Model-Based Design:

"Model-based design allowed us to create our standard plan set faster and cheaper than CAD-based design. At the same time, we are providing a more accurate 3D model that is the by-product of design. Construction will subsequently use the design models to build the project."

Eric Arneson
Methods Development - Civil Engineer
Wisconsin Department of Transportation

Results:

- Complete roadway designs faster and more affordably
- Deliver more accurate 3D models for use in construction

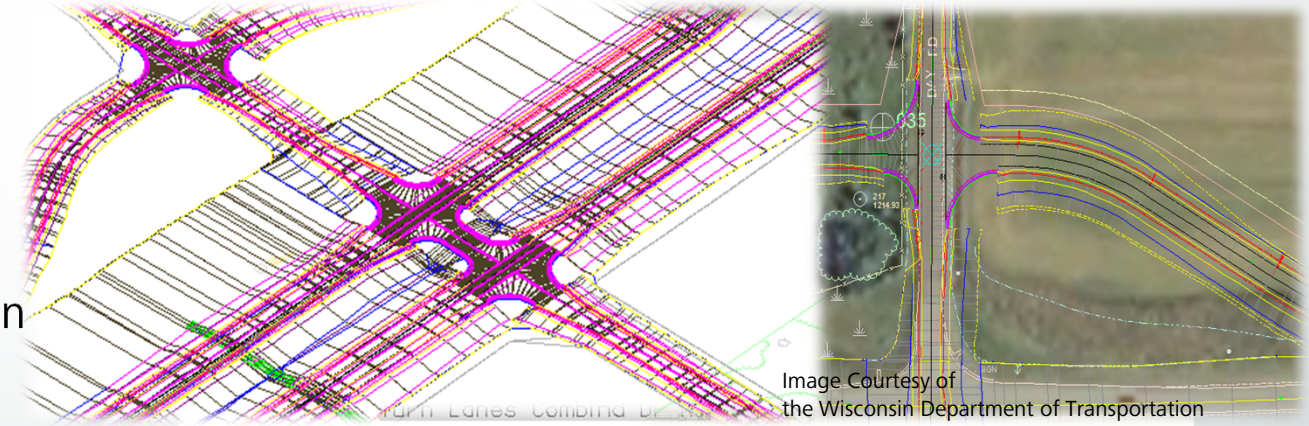
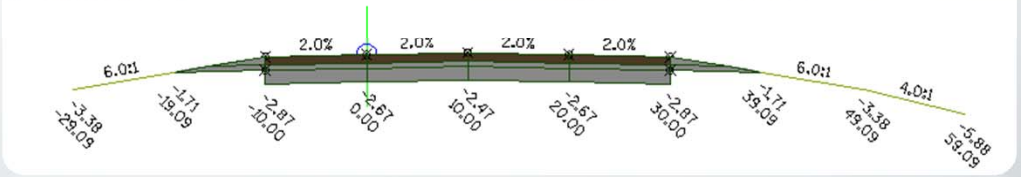


Image Courtesy of
the Wisconsin Department of Transportation



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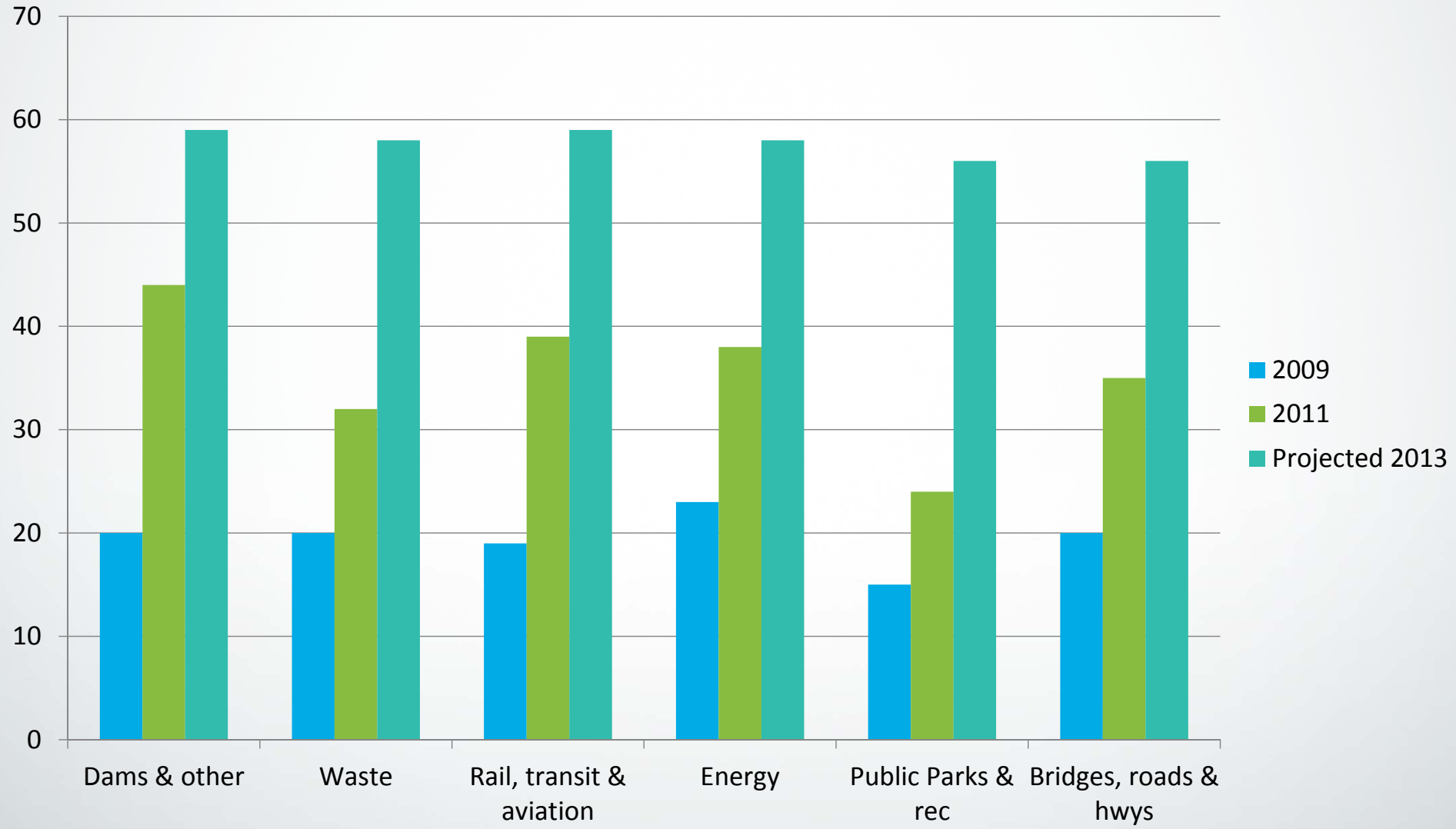
BIM for Infrastructure Pilots



Source: Smart Market Report by McGraw Hill Construction, 2012

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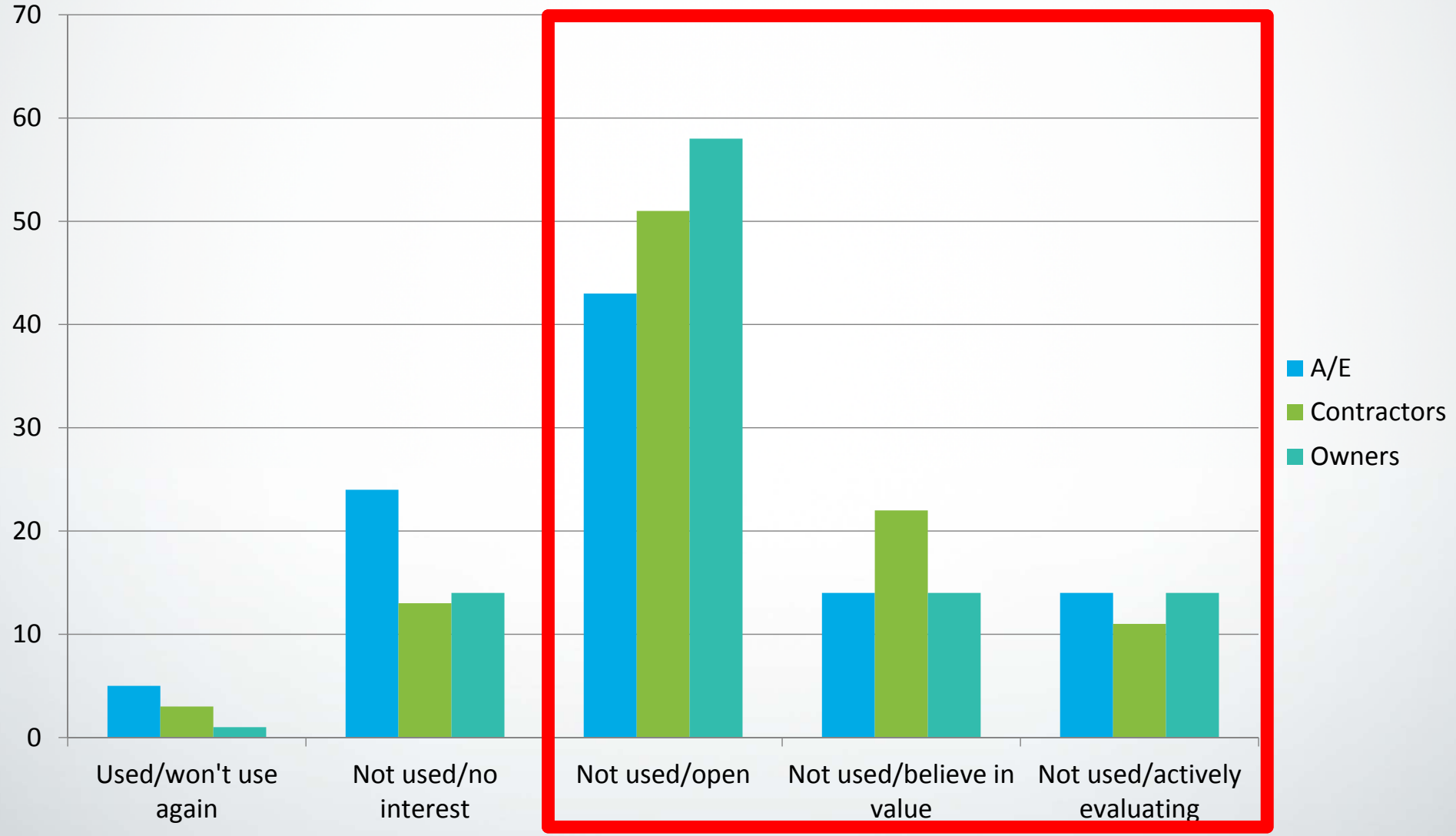
Significant Opportunity in Infrastructure Remains Ahead of Us



Source: Smart Market Report by McGraw Hill Construction, 2012

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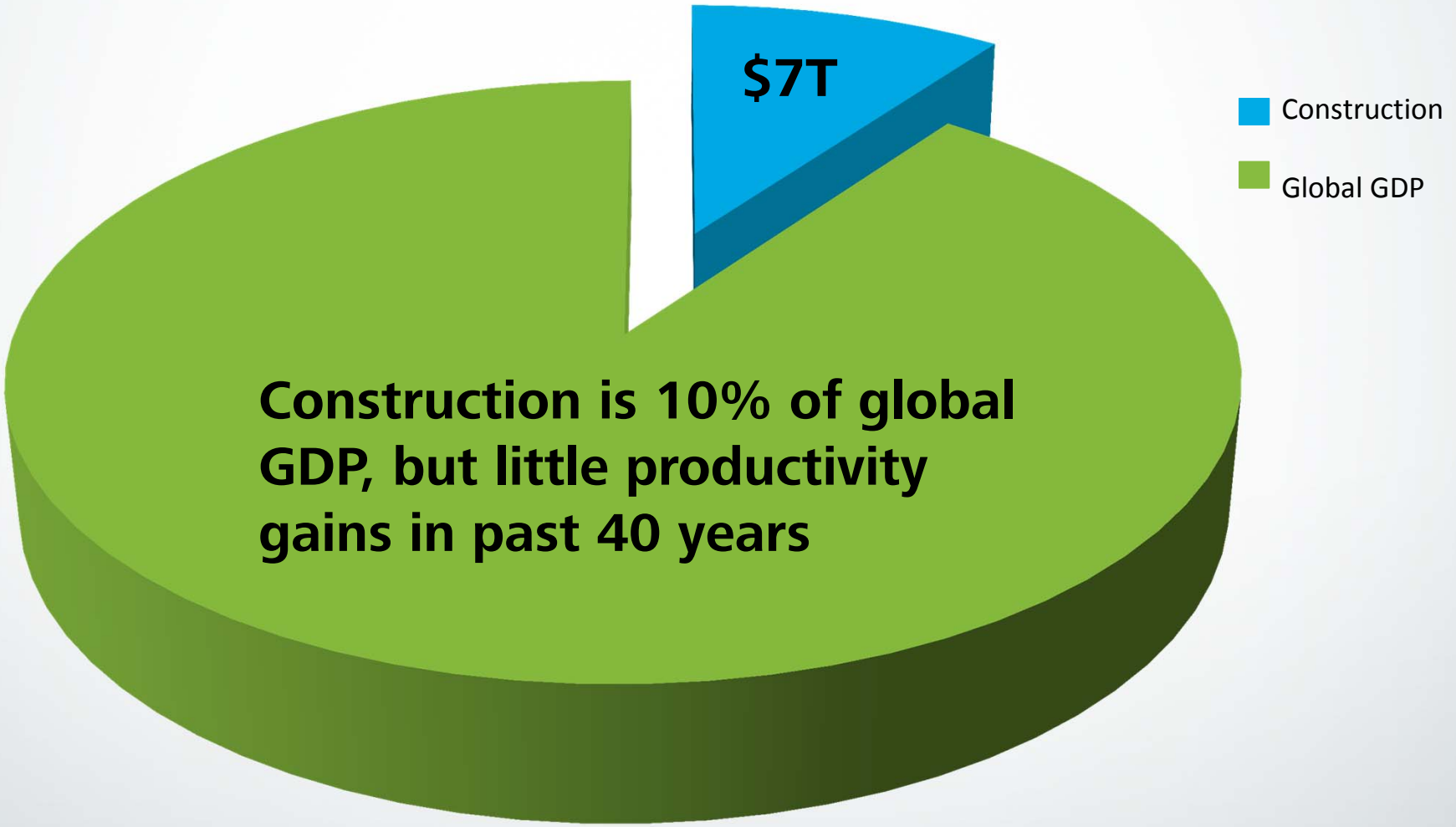
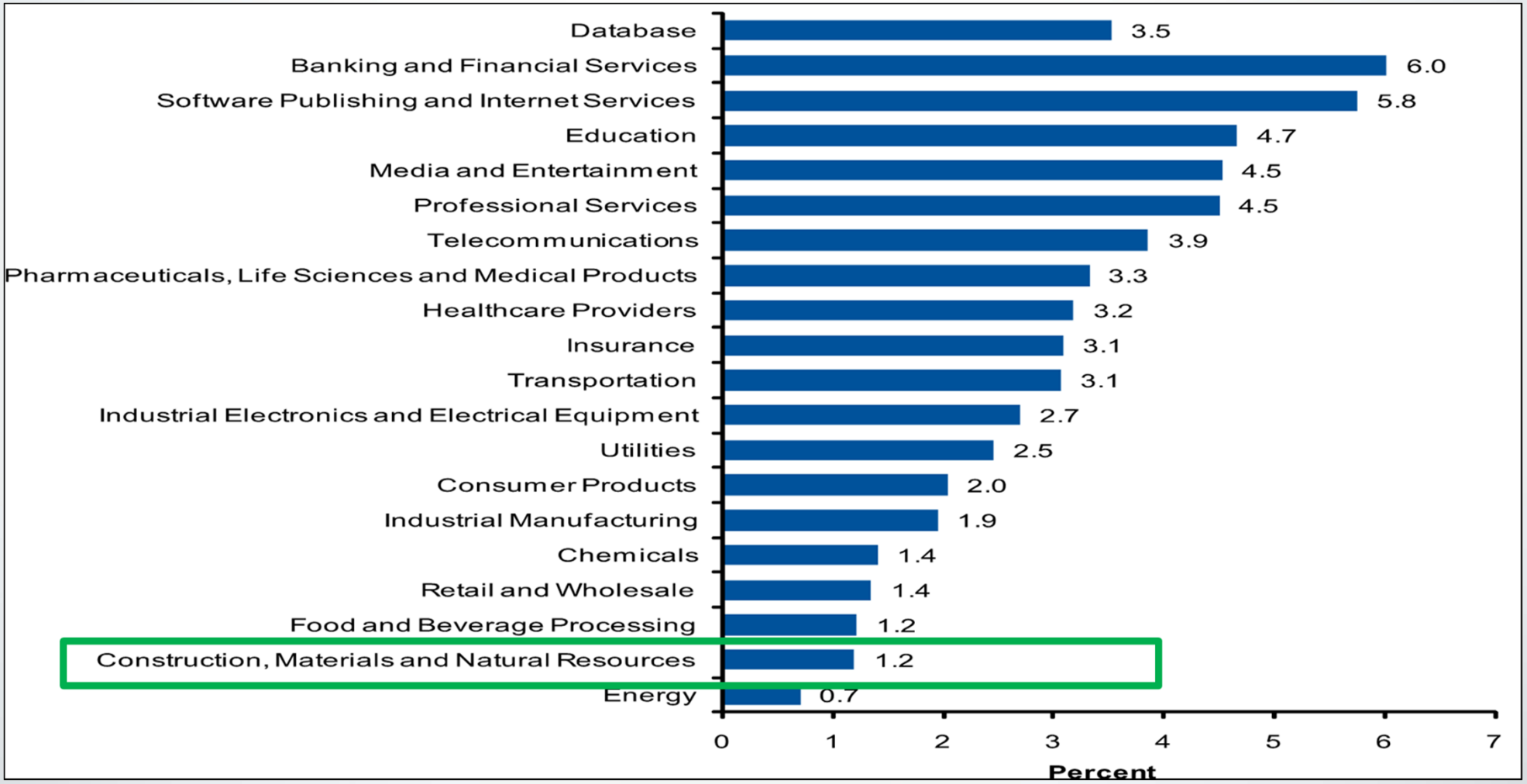
BIM for Construction – Immense Opportunity



Projects: 50% break schedule targets & 30% of costs from waste

Sources: ENR, Oxford Economics, McKinsey Group, Journal of Construction Engineering

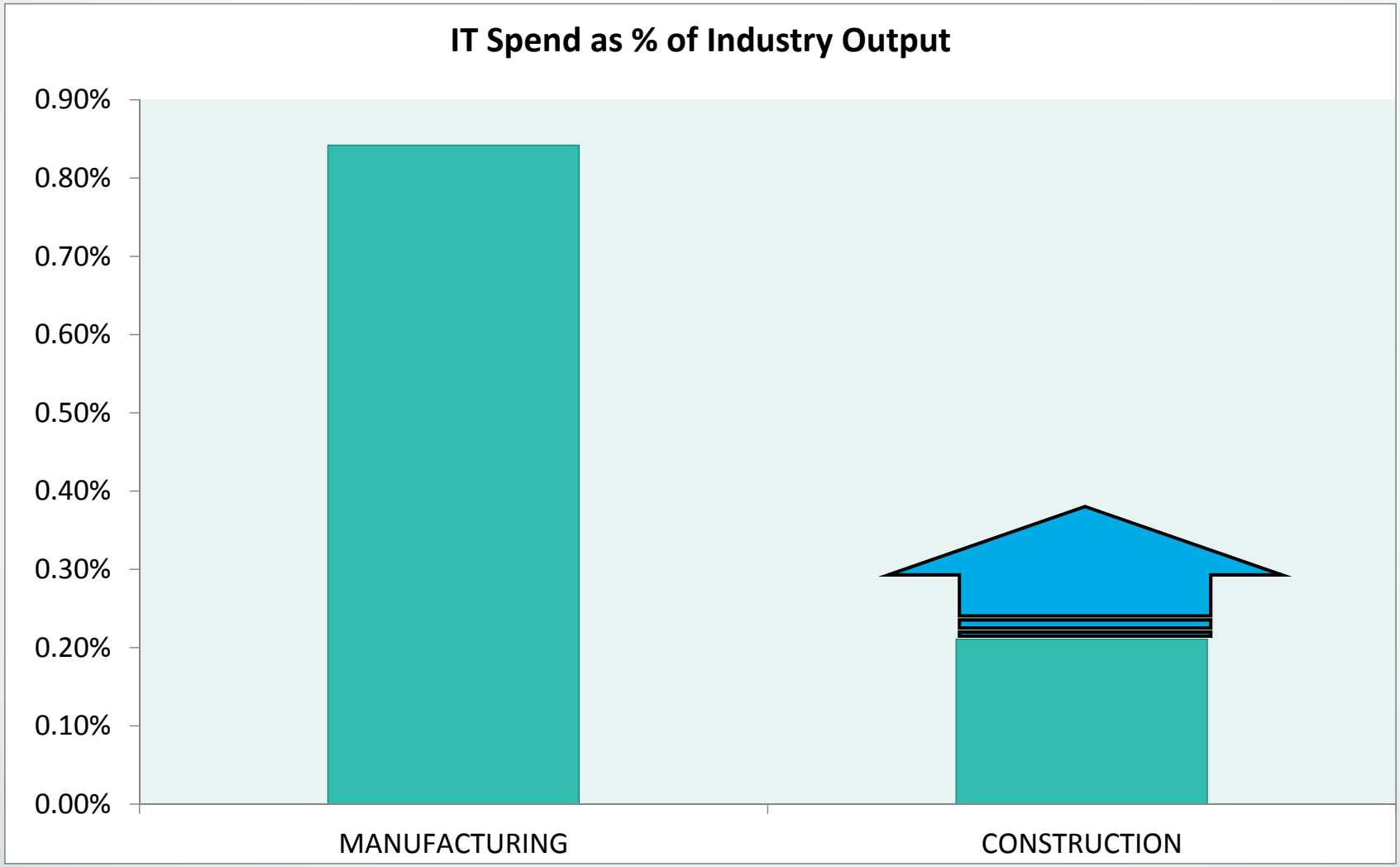
Construction Industry Historically Low IT Spend



Source: Gartner ITKMD (January 2011)

Figure 5. IT Spending as a Percent of Revenue by Industry, 2010

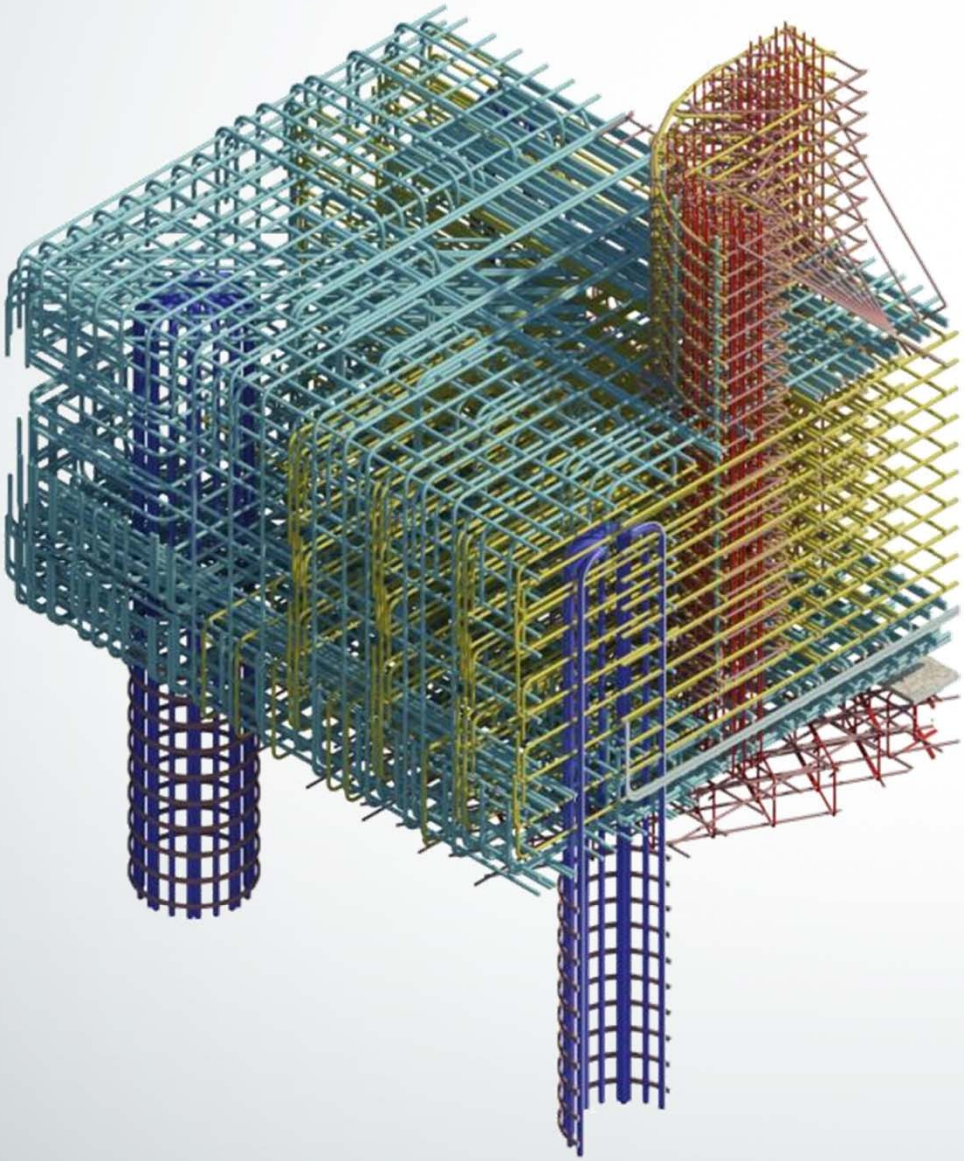
Tremendous Upside in Construction IT Spend

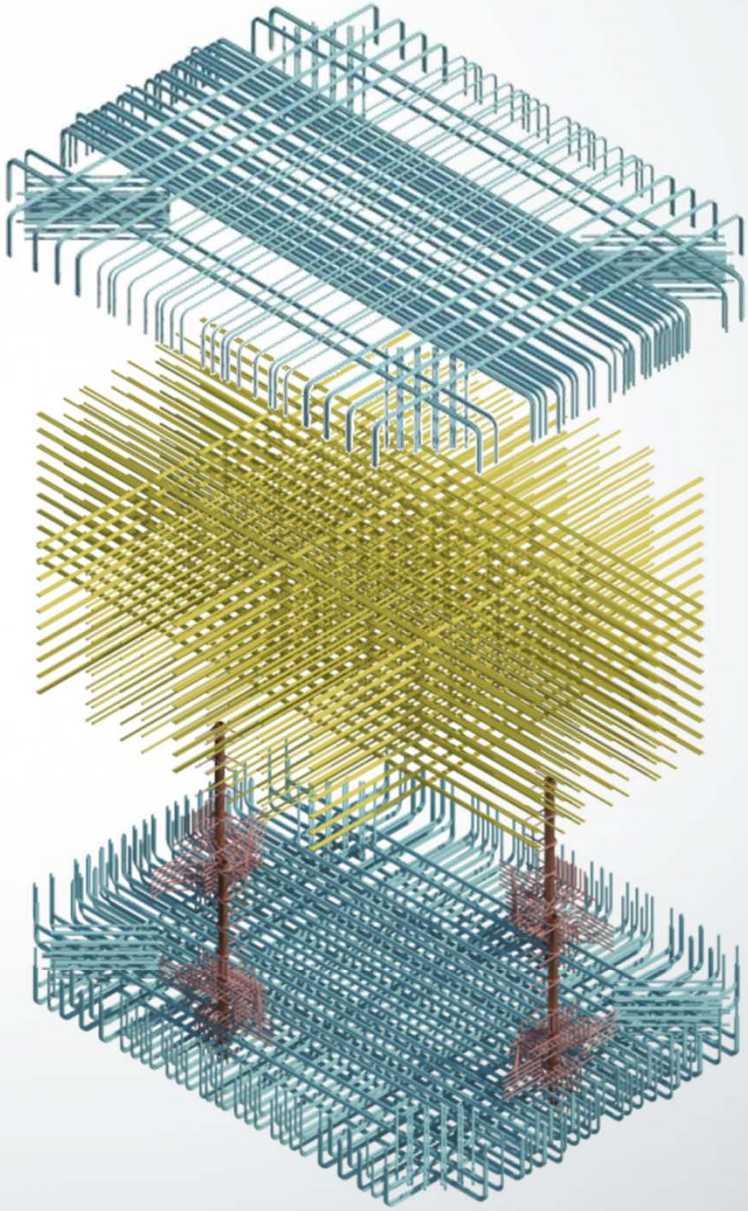


Source: 2010 Industry IT Spend (US Govt Bureau of Econ analysis)

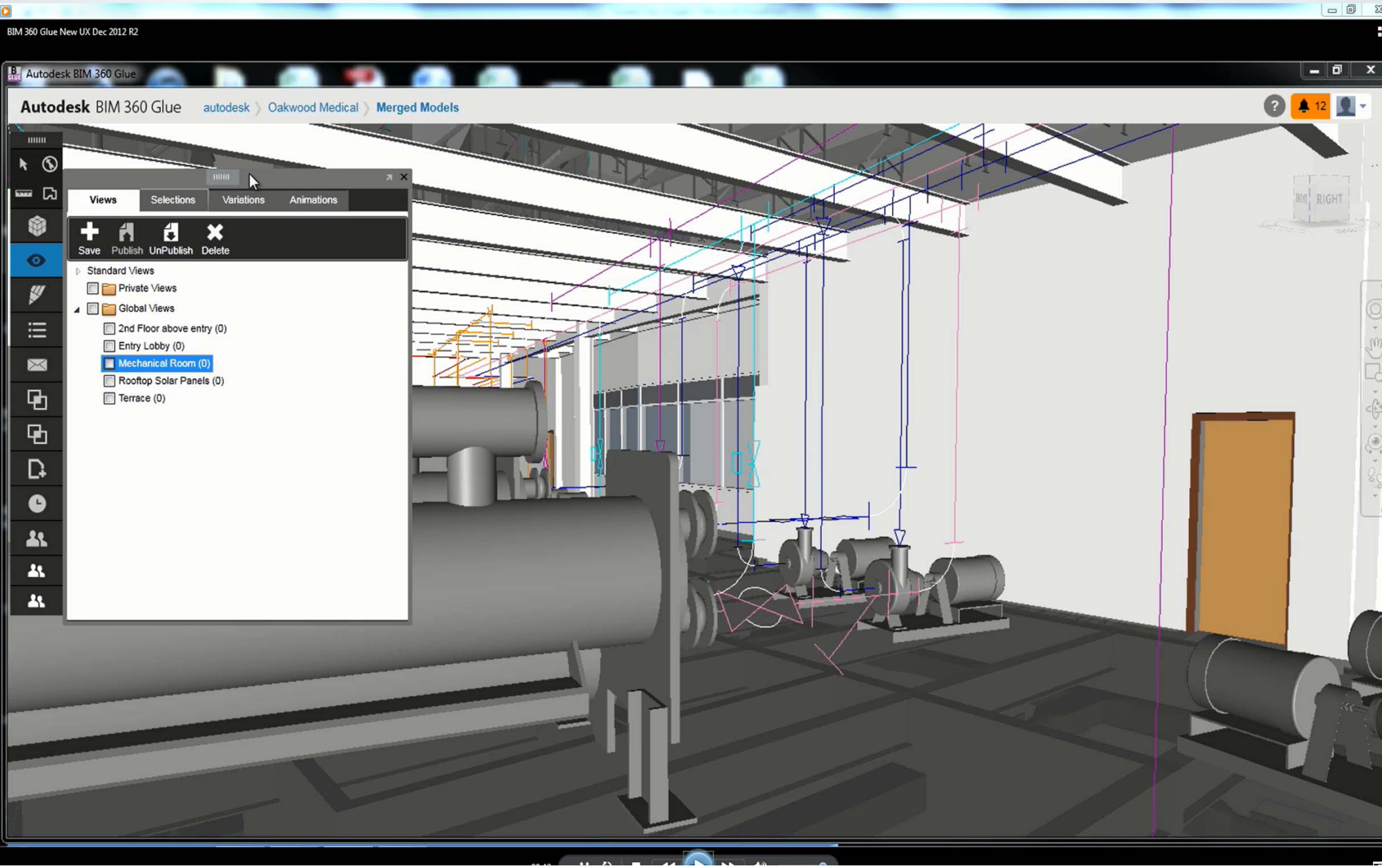
BIM for Construction

Construction Modeling

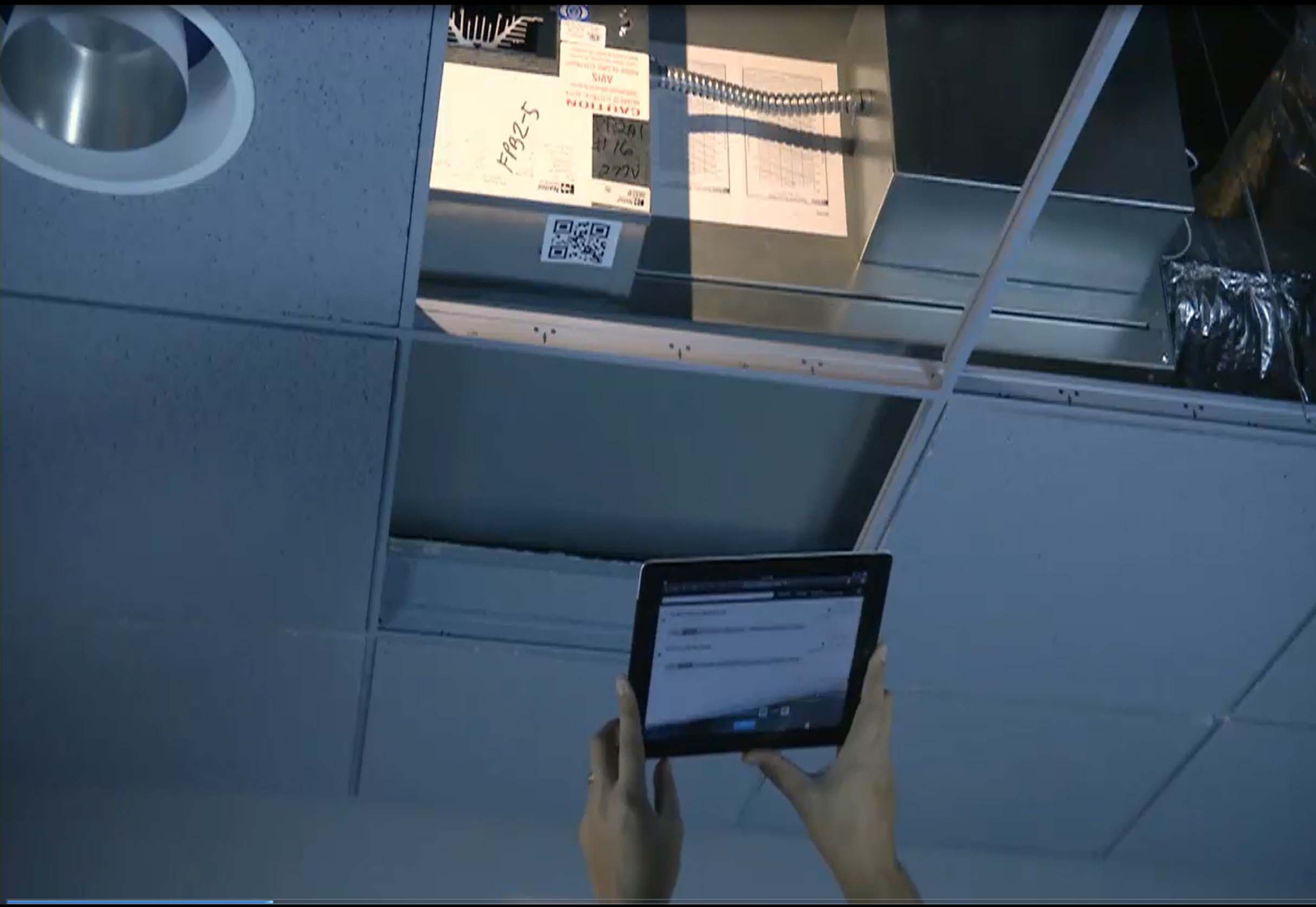




Autodesk BIM 360: Taking BIM to the Cloud



Field Use_Over the shoulder



Capturing the BIM Opportunity

- Growing adoption of BIM worldwide
- BIM growth across industry disciplines
- Big opportunities in infrastructure & construction
- Autodesk leading the transition to the cloud with Autodesk 360