Driving growth in AEC with sustainability

Amy Bunszel
Executive Vice President
Architecture, Engineering and Construction
Design Solutions
Safe harbor

The presentations today may contain forward-looking statements about our strategies, products, future results, performance or achievements, financial, operational and otherwise, including statements about our strategic priorities, business model transition, and guidance for the fiscal year 2023 and beyond; our long term financial and operational goals; our M&A strategy; and our capital allocation initiatives. These statements reflect management’s current expectations, estimates and assumptions based on the information currently available to us. These forward-looking statements are not guarantees of future performance and involve significant risks, uncertainties and other factors that may cause our actual results, performance or achievements to be materially different from results, performance or achievements expressed or implied by the forward-looking statements contained in these presentations, such as a failure to successfully integrate acquired businesses; developments in the COVID-19 pandemic and the resulting impact on our business and operations; general market, political, economic, and business conditions; complete transitions to new business model and markets; failure of the construction industry to grow as anticipated; failure to develop new products; failure to successfully expand adoption of our products; and failure of product changes to have the desired benefits.

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Architecture, Engineering & Construction

$35B
DESIGN AND CONSTRUCTION
TAM THROUGH FY26

29M
DESIGN & CONSTRUCTION
PROFESSIONALS

Sources:
Cambashi FY22 Application TAM
Models based on Cambashi FY22 Professions Dataset and Autodesk estimates
Global Water Intelligence 2021 figures in addition to internal estimates
Architecture, Engineering & Construction

$20B
Design TAM

12M PROFESSIONALS
- Architecture: 4M
- Building Engineering: 3M
- Civil/Infra Engineering: 3M
- Industrial/U&T/Other: 3M

$16B
Make TAM

17M PROFESSIONALS
- Documentations: 10M
- Preconstruction: 3M
- Site Execution: 4M
- Industrial/U&T/Other: 3M

Sources:
Cambashi FY22 Application TAM
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Global Water Intelligence 2021 figures in addition to internal estimates
DIGITAL TRANSFORMATION IN ARCHITECTURE & ENGINEERING

EXPANDING BIM ACROSS THE BUILT ECOSYSTEM

ENABLING CUSTOMERS WITH OUTCOME-BASED DESIGN & AUTOMATION
Opportunity in sustainability
End-to-end digital solutions enable our customers to realize their sustainability goals

**CARBON**
- 40% of global emissions from buildings
- 19% of global emissions from manufacturing

**WATER**
- ~2 trillion gallons lost each year in the U.S.
- ~8 trillion gallons lost each year worldwide

**WASTE**
- 1/3 of waste in developed world from construction
- 10% of waste in Europe from manufacturing
Opportunity in sustainability

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Total carbon management relates to the measurement and minimization of embodied and operational carbon in the design and make process. We support customers with tools that tackle the total carbon impacts of the building lifecycle. From solutions to improve project performance, driving down operational carbon through energy efficiency and renewables— to connected data solutions to minimize embodied carbon through informed design, specification, and procurement.
Dekker/Perich/Sabatini (D/P/S)
Energy efficient solutions save ~$2.5M over 30 years
Climate and instant road noise analysis

Spacemaker
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Opportunity

**Water management**

As pressing issues around water quality and scarcity accelerate—our customers increasingly rely on insights to enable more cost-effective and sustainably designed water distribution networks, water collection systems, green stormwater management, water and wastewater treatment plants, and flood protection systems.
Water infrastructure
End-to-end full lifecycles solutions

PLANNING (OWNERS + ENGINEERS)
- Planning
- Hydraulic Modeling (Analysis & Simulation)
- Detail Design Documentation

DESIGN (ENGINEERS)

BUILD (CONTRACTORS)

O&M (OWNERS)
- Asset Management
- Operational Analytics

Autodesk Market Segmentation

- Structures
- Water Structures
- Drainage
- Water Distribution
- Storm, Sewer, Flood
- Water | Wastewater | Industrial

Networks

- Networks
- Water Structures
- Drainage
- Water Distribution
- Storm, Sewer, Flood
- Water | Wastewater | Industrial

- CIVIL 3D
- REVIT

- Autodesk Construction Cloud
- InfoAsset
- Info360
- Infoworks
- Infodrainage
- Infowater
Water infrastructure
Combined go-to-market

Expansion in Autodesk Enterprise Named Accounts
(Incremental new business)

Expansion in countries new to Innovyze with Autodesk Territory Sales
(Leverage top Channel partners in Germany, France, Japan, India)

Expansion in existing Innovyze countries with Autodesk Territory Sales
(Leverage top Channel partners in US, CAN, UK, ANZ)

Market expansion in Owner Operations
(Target Owners with new offerings)
Thames water
Aggregating real-time data into a dynamic digital twin
Opportunity in sustainability
End-to-end digital solutions enable our customers to realize their sustainability goals

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Waste

The construction industry is one of the least digitized, with much to gain for all stakeholders. BIM and connected construction have critical roles to play in reducing waste and driving innovation. Circularity, Adaptive Design, Industrialized Construction and other processes like regenerative building is expanding what is possible.
# Autodesk Construction Cloud™

## Capabilities

<table>
<thead>
<tr>
<th>DESIGN</th>
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<th>OPERATE</th>
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## Shared Data

- Models
- Drawings
- Issues
- Specifications
- RFIs
- Cost
- Assets
- As-Builts
- Photos
- Video

## Insight

- Dashboards
- Reports
- Construction IQ
- Data Connector

## Network

Builders Network
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**Network**
- Builders Network
Skanska USA

Going beyond sustainability to create a regenerative building
Why we win in Architecture and Engineering

Technology leader in AEC

Spanning the entire project ecosystem for multiple industries

Vast ecosystem

BY BRINGING OUR STRENGTHS TOGETHER