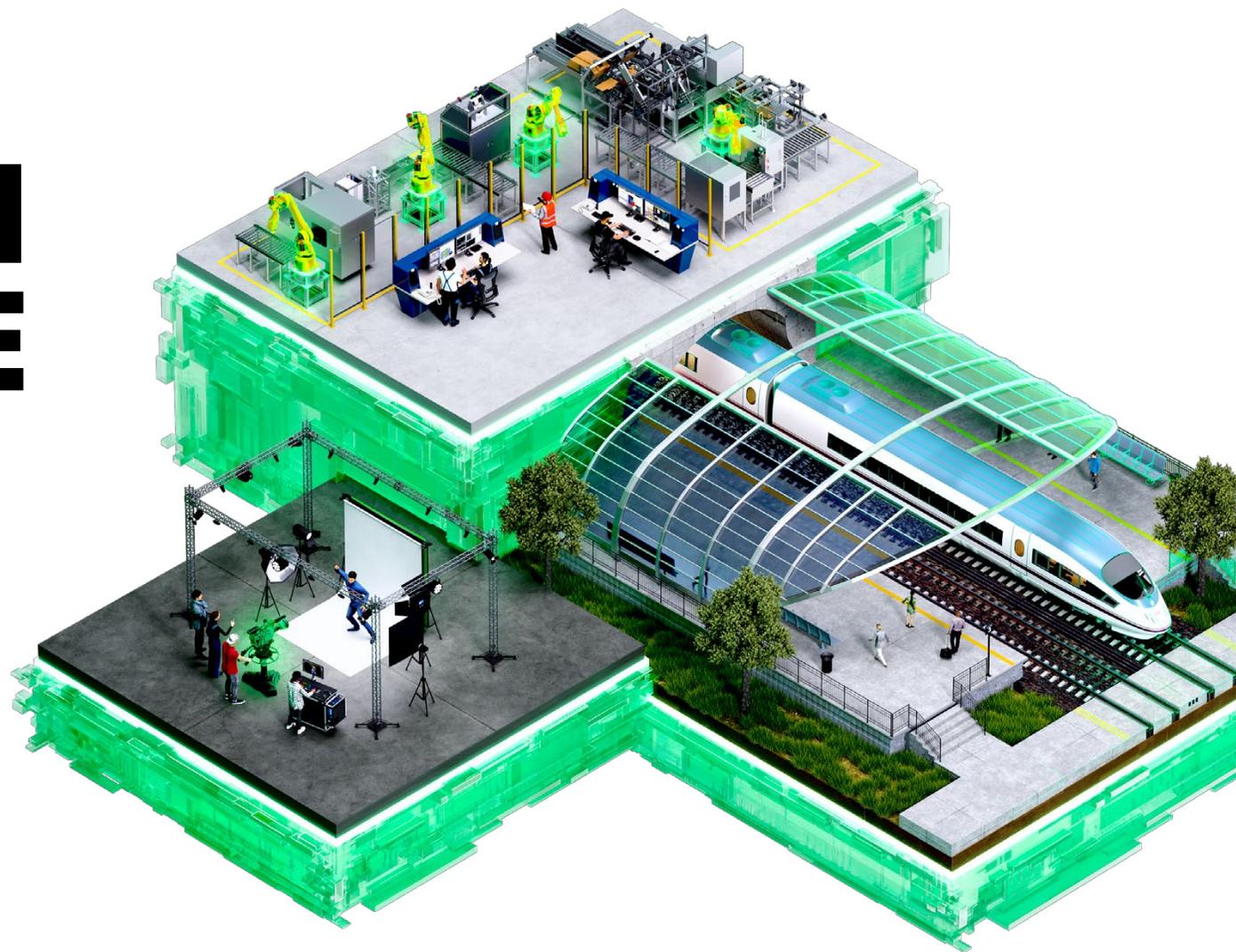


2024 STATE OF DESIGN & MAKE

Europe, the Middle East,
and Africa Regional Edition

Insights from industry leaders on how digital
transformation is driving business resilience,
sustainability, and talent management



 **AUTODESK**

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About the study

The *State of Design & Make* report is a global, annual study for leaders who design and make places, objects, and experiences. It identifies the most pressing issues shaping today's businesses and helps leaders make informed, strategic decisions about how to prioritize and invest in the future.

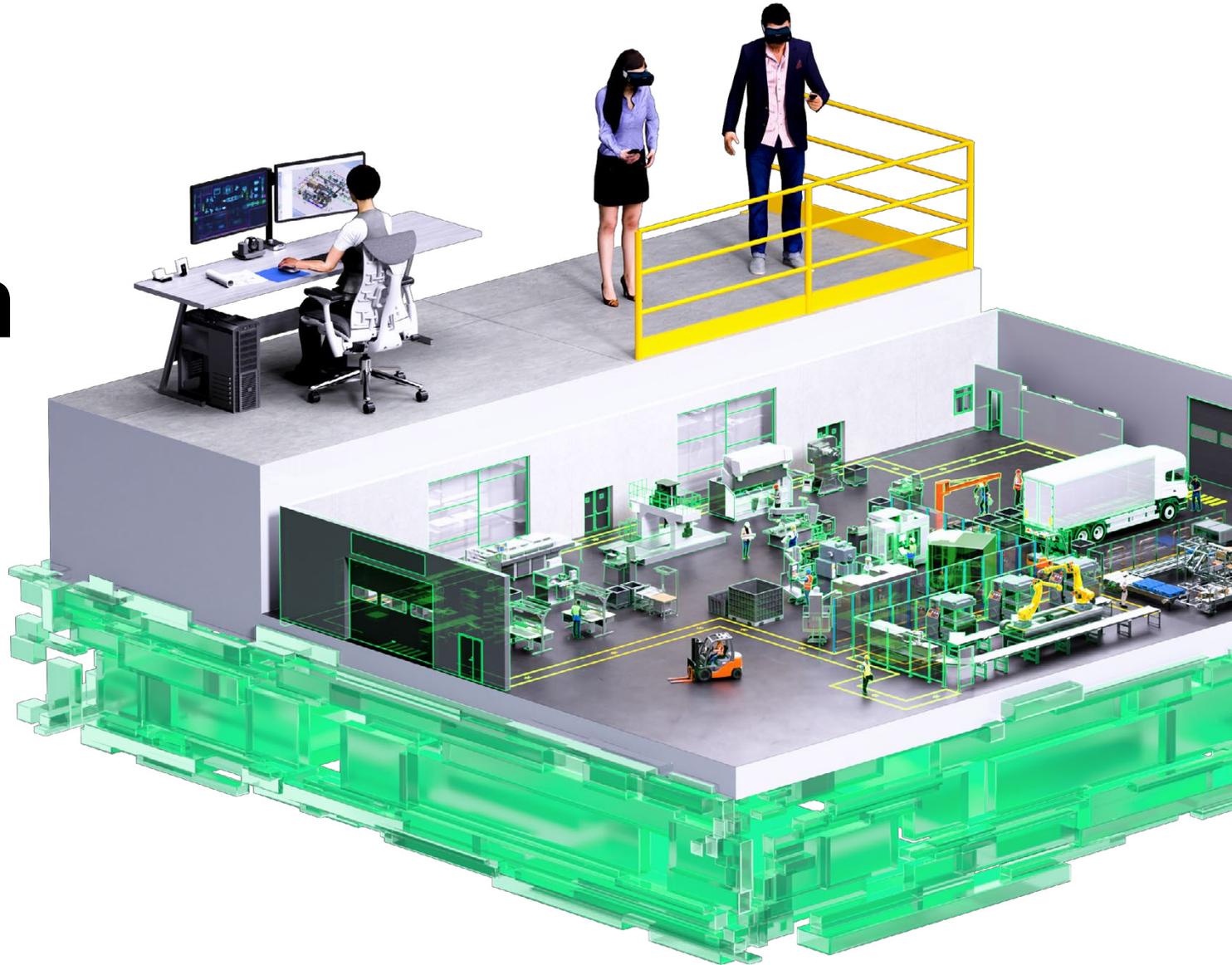
Unless otherwise noted, the data in this document is from the EMEA region sample of 2,389 cross-industry business leaders and experts—a subset of Autodesk's 2024 *State of Design & Make* report—located across Europe, the Middle East, and Africa region.

The overall sample includes 5,368 industry leaders, futurists, and experts from the following industries: architecture, engineering, construction, and operations (AECO); design and manufacturing (D&M);

and media and entertainment (M&E). Survey data in the main report has been broken down by global region: Asia-Pacific (APAC), which includes responses from Australia, China, India, Japan, and South Korea; Europe, Middle East, and Africa (EMEA), with responses from France, Germany, Italy, the Middle East, the Netherlands, the Nordics, Spain, Turkey, and the United Kingdom; and the Americas (AMER), with responses from Brazil, Canada, Mexico, and the United States.

Introduction

Key themes and top insights





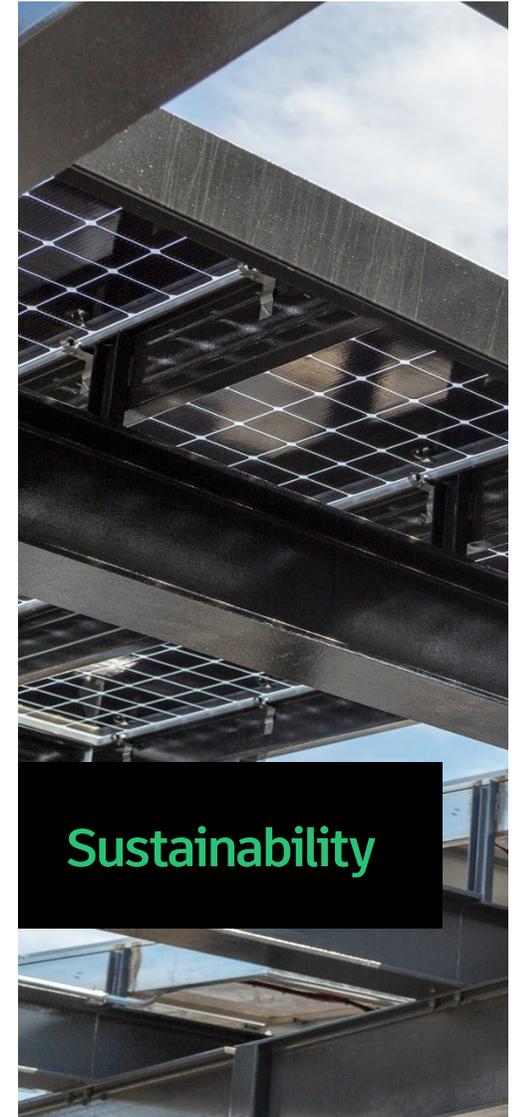
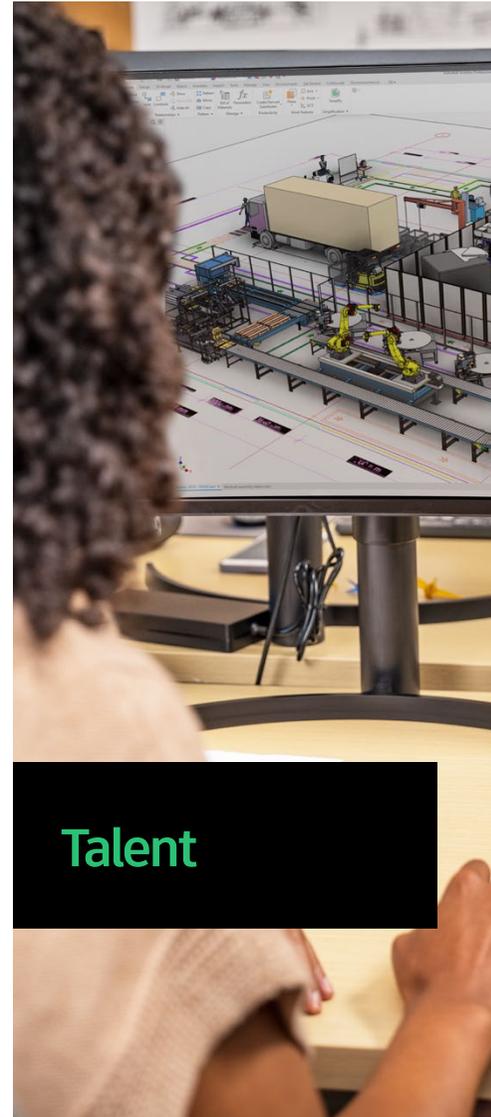
Leaders and experts in the design and make industries across the Europe, the Middle East, and Africa (EMEA) region have undergone a seismic shift in sentiment over the past year, driven by groundbreaking technological advancements, increasing cost concerns, and a new focus—from both the public and private sectors—on sustainability. Business leaders and experts in EMEA are far more optimistic about the global landscape, as well as about their companies' resilience, preparedness, performance, investment, and level of digital transformation than they were in Autodesk's *2023 State of Design & Make* report.

Concerns about a global recession have eased, and cost control is now top of mind for leaders and experts across industries. Finding and retaining talent remains challenging, though less so than in previous years.

Also new this year was the understanding that artificial intelligence (AI) is a tool for today rather than a pipe dream, and with that understanding, a surprising degree of trust. Leaders are embracing AI and emerging technology and the possibility of productivity gains through automation, augmentation, and analysis. One benefit is improved sustainability. AI has risen to the top spot in terms of technologies leaders are using to make their businesses better able to meet sustainability goals.

This acceptance of AI has shown that new technologies have the power to transform organizations. Leaders who want to stay competitive should focus on harnessing the power of their internal data, attracting, training, and retaining tech-savvy talent, and leaning into sustainability efforts that provide long-term revenue opportunities.

Key themes



Top insights

Business resilience



1. **Optimism is returning:**

Leaders feel their companies are far more resilient than last year



2. **Cost control** has risen above talent as the top challenge for businesses



3. **Digitally mature companies** are reporting even greater success



4. Companies are already making meaningful progress on their **AI adoption journeys**

Talent



5. **Upskilling** is essential but out of reach for many



6. Companies are taking a multipronged approach to solving the **talent problem**

Sustainability



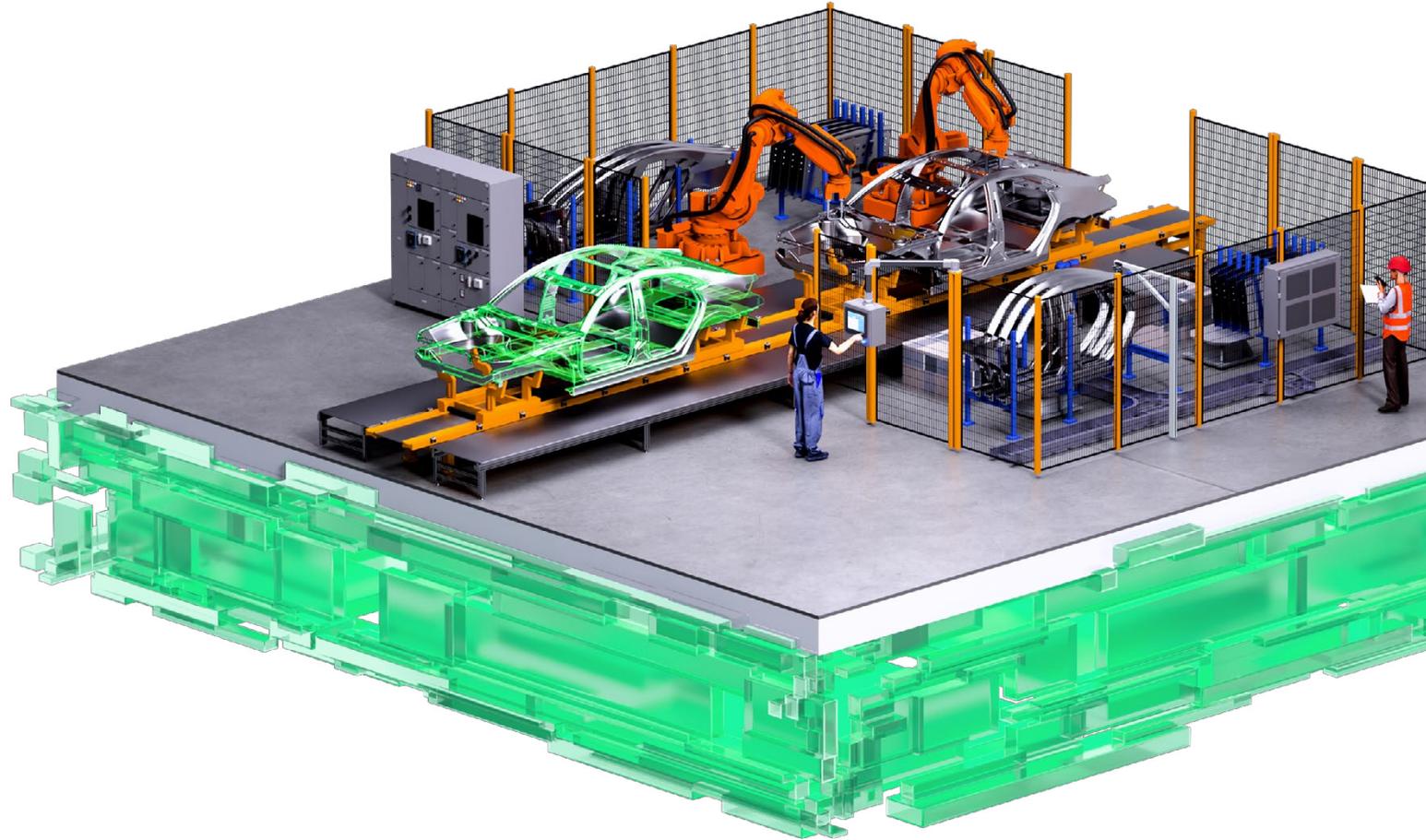
7. Companies are **taking sustainability seriously**



8. Sustainability is improving both **short-term and long-term business health**

Business resilience

Digitization boosts business resilience amid continued challenges



BUSINESS RESILIENCE

A positive outlook, new challenges, and the value of digital tools

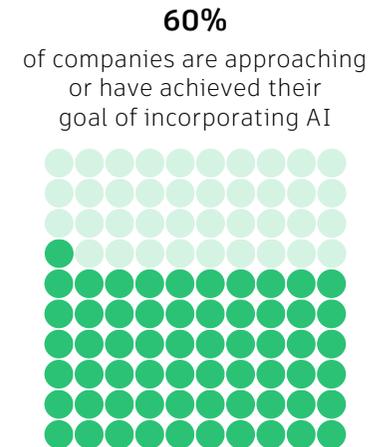
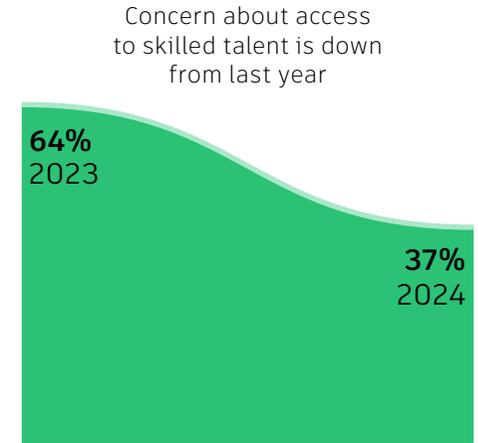
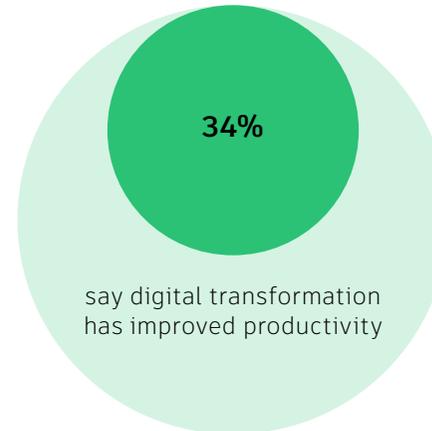
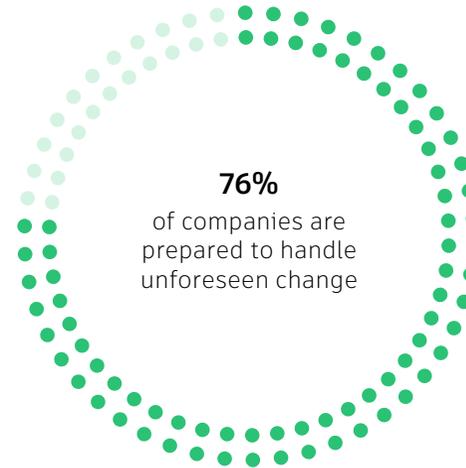
In a word, EMEA business leaders and experts this year are optimistic.

While significant challenges remain, the past few years have proven how resilient their organizations are. As a result, they feel far more confident than they did last year in their ability to tackle challenges effectively.

In the overall sample, talent took the top spot last year among business challenges, with organizations struggling with both

talent acquisition and retention. This year, cost control outweighs labor concerns, followed by product and service innovation and environmental sustainability.

Keeping up with the rapid pace of technological change—including artificial intelligence—is another important challenge, but one that presents significant opportunity for companies able to make strategic investments. Professionals report an array of benefits from digital investments, but they also say that costs, a lack of time, and skills gaps all present barriers to their digital transformation efforts.



INSIGHT 1

Optimism is returning

Business leaders and experts feel more prepared than before to face an uncertain future.

Last year, survey respondents emphasized the sense of uncertainty brought about by the global pandemic, geopolitical turmoil, and economic instability in many markets, with many businesses struggling to attract and retain the talent they needed to grow.

This year, leaders in EMEA are much more confident. Seventy-seven percent say their companies are prepared to handle unforeseen economic or geopolitical changes, up significantly from 58% in 2023.

This confidence is due in part to businesses successfully navigating unprecedented challenges over the past several years. “Coming out of COVID, people are a lot more optimistic,” says Richard Matchett,

digital lead at Zutari, an infrastructure engineering and advisory practice in South Africa. “We’ve had a year now to figure out which way is up.”

Companies are also proactively improving their positions, taking steps such as planning new offerings, entering new markets, increasing agility, and diversifying supply chains. The more of these steps that a company takes to boost resilience, the more confident leaders feel about the future.

Businesses are also performing better and keeping pace with their competition. Seventy-five percent of leaders and experts say their companies outperformed expectations last year. And in 2024, only 5% say that their company is not keeping up with the rate of change in their industry this year, a major drop from 10% in 2023.

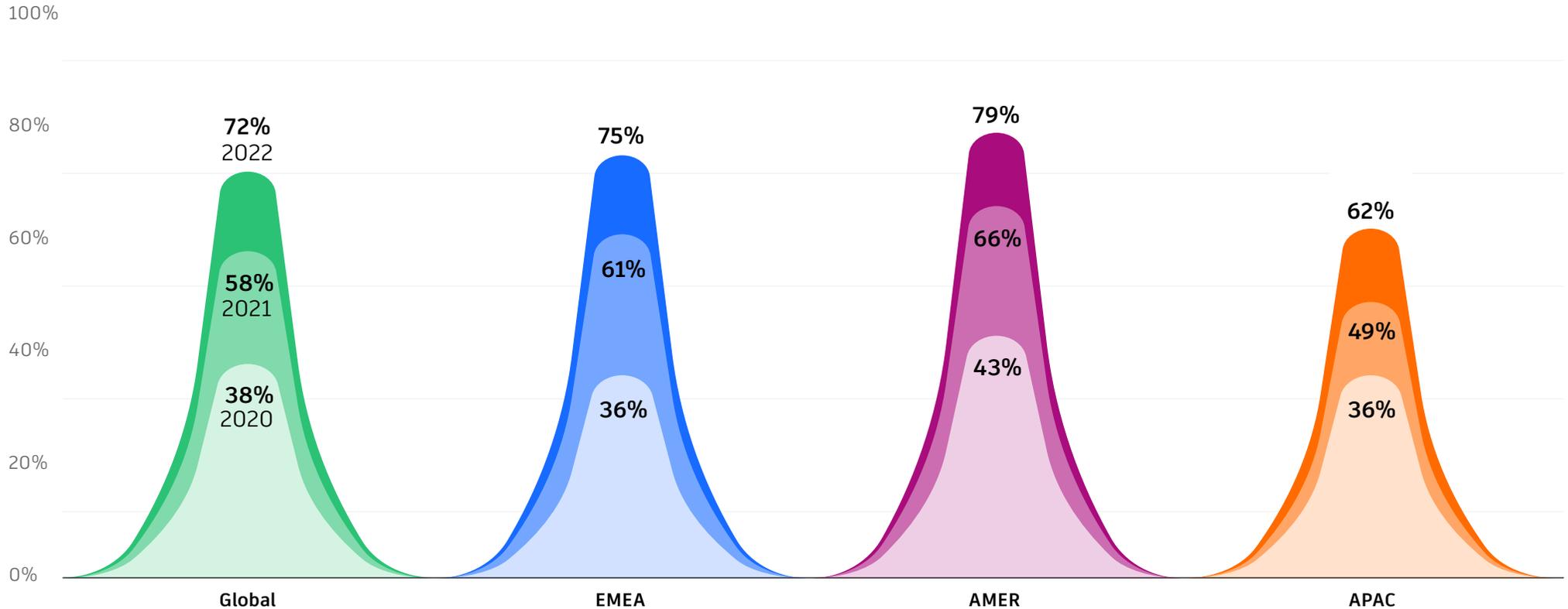


50%

of EMEA leaders and experts say the global landscape feels more uncertain now than three years ago, down significantly from 86% in 2023

Company performance is improving

EMEA: Percentage of businesses that outperformed corporate expectations



Survey question: How has your company or organization performed compared to corporate expectations in each of the last 3 years? In 2020, in 2021, in 2022. 5-point scale. Top two = above average performance.

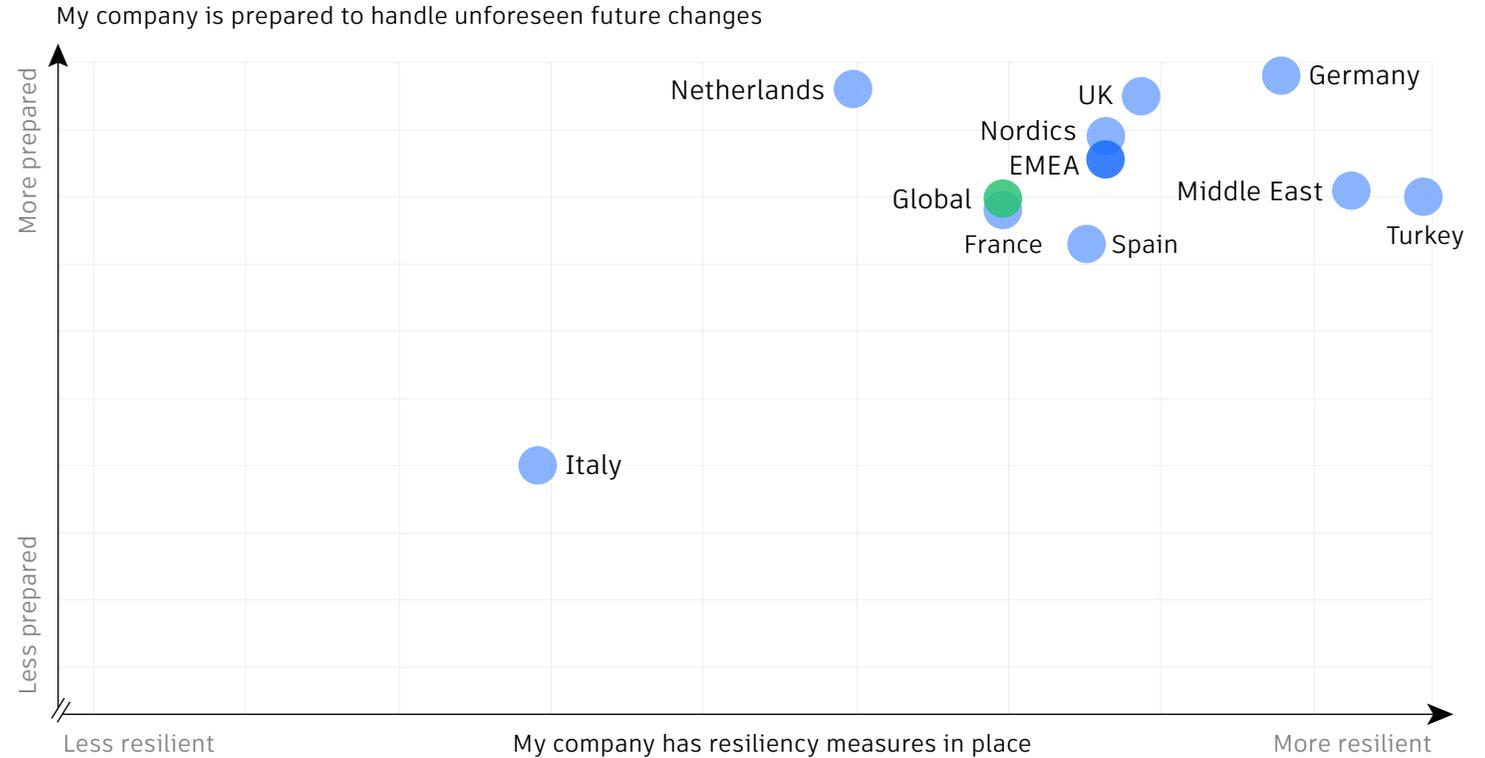
INSIGHT 1

Resiliency measures are tied to confidence

When companies take more steps to boost resilience, leaders and experts are more confident about the future.

This year's survey asked about efforts to plan new offerings, enter new markets, increase agility, and diversify supply chains. At companies where leaders agree they are taking these measures, respondents feel much more equipped to face future uncertainty.

The connection between preparedness and resilience

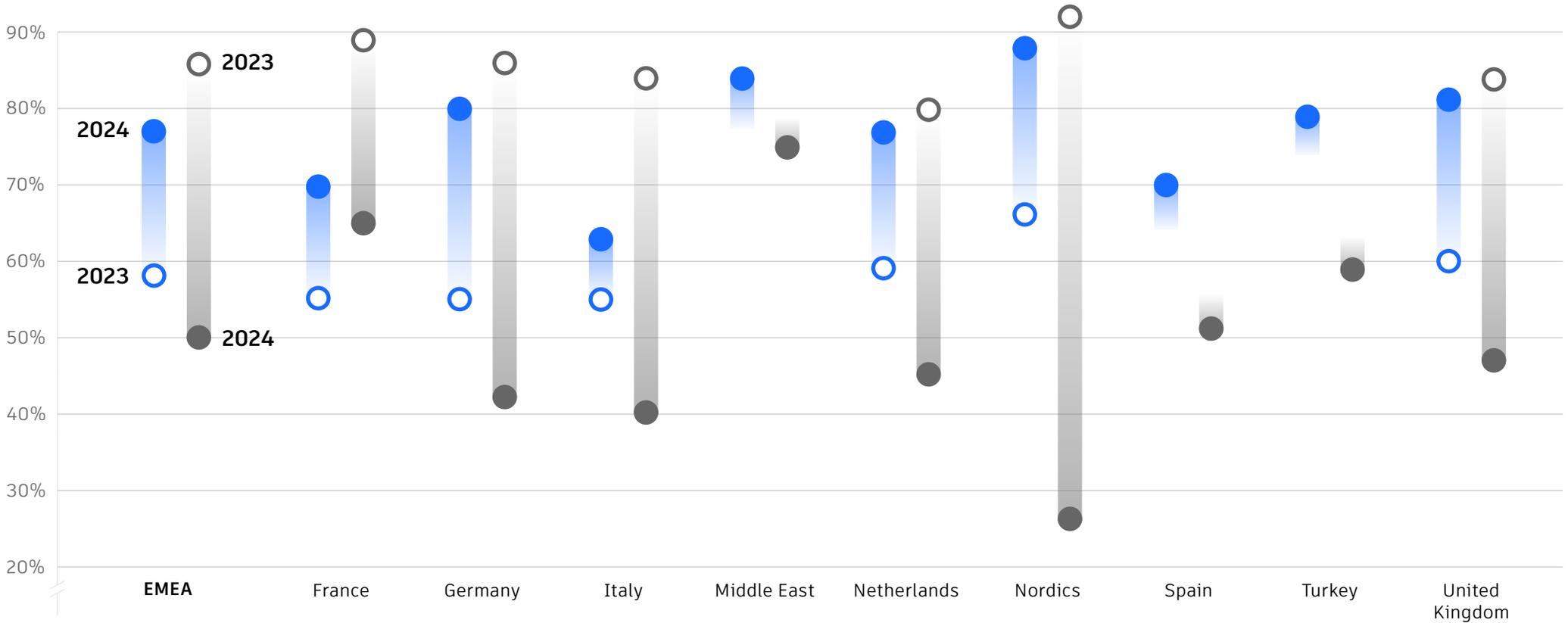


Survey question: My company is well prepared to handle unforeseen future macroeconomic and geopolitical changes. x Resiliency is the average score of the survey question: To what extent do you agree or disagree that your company or organization is doing the following to be more resilient? Planning new offerings, entering new markets, increasing agility, and diversifying supply chain. 5-point scale.

INSIGHT 1

EMEA companies are confident about the future

- My company is prepared to handle unforeseen future changes
- The future global landscape feels more uncertain now than 3 years ago



Percentage of EMEA respondents who agree with statements: 1. My company is well prepared to handle unforeseen future macroeconomic and geopolitical changes. 2. The future global landscape feels more uncertain now than 3 years ago. 5-point scale. Top two = agree. Note: Middle East, Spain, and Turkey were not included in the 2023 survey.

INSIGHT 2

Cost control has risen above talent as the top challenge for businesses

Talent remains a critical factor for company success, but it is no longer the top challenge many businesses are facing.

Cost control and management is now the top concern for many, with 32% of respondents in EMEA citing it as their biggest challenge. Leaders at struggling companies are, understandably, even more concerned about costs than others.

Talent still ranks as a top-three challenge for 26% of business leaders and experts, although this number is down significantly from 49% a year ago. Thirty-seven percent say that access to skilled talent is a barrier

to their company's growth, a significant decrease from 64% last year.

"It's a balance between cost control and talent," says David Spilsbury, chief technology officer for Axis Studios, an animation and VFX studio located in the United Kingdom. "How do you grow talent to meet demand, without growing too much—which creates the risk of needing to downsize later? Technology can help companies hit that sweet spot in the middle."

Additional top challenges include product and service innovation (25%), environmental sustainability (28%), data

automation (26%), and global economy and events (26%).

The global economy and events, which ranked as a top-three challenge a year ago, has fallen to fifth place this year. However, it is important to note that survey data was collected before the October 2023 outbreak of conflict in the Middle East.

These challenges facing organizations are multi-faceted, forcing decision-makers to weigh competing priorities—for instance, opting for only those sustainability measures that offer a return on investment in the form of energy savings.

28%

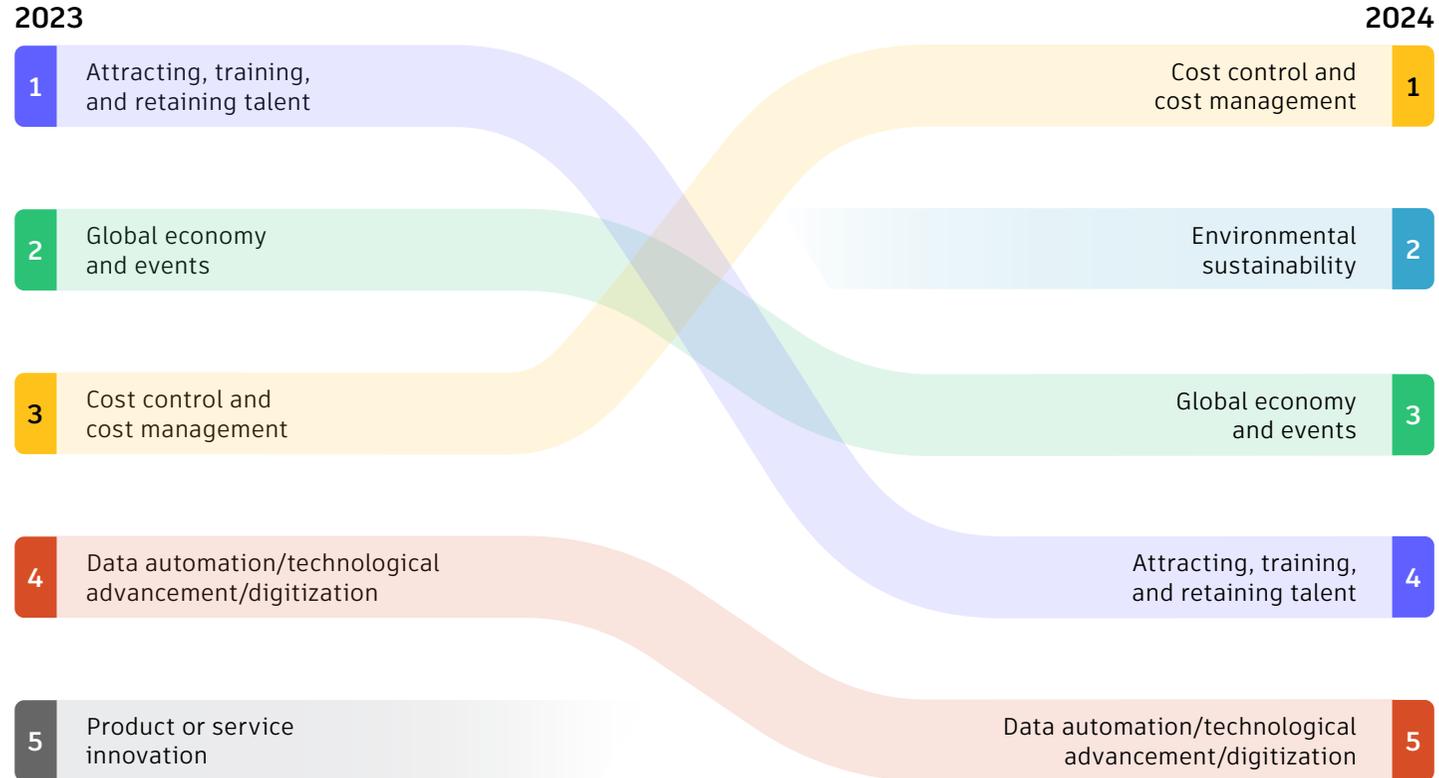
of organizations in EMEA have strongly increased investment in technology to deliver improved project outcomes over the past 3 years



INSIGHT 2

Cost control emerges as the top business challenge

Top 5 challenges showing year-over-year change in EMEA



Survey question: What are the top 3 challenges your company or organization faces today? Select up to three.

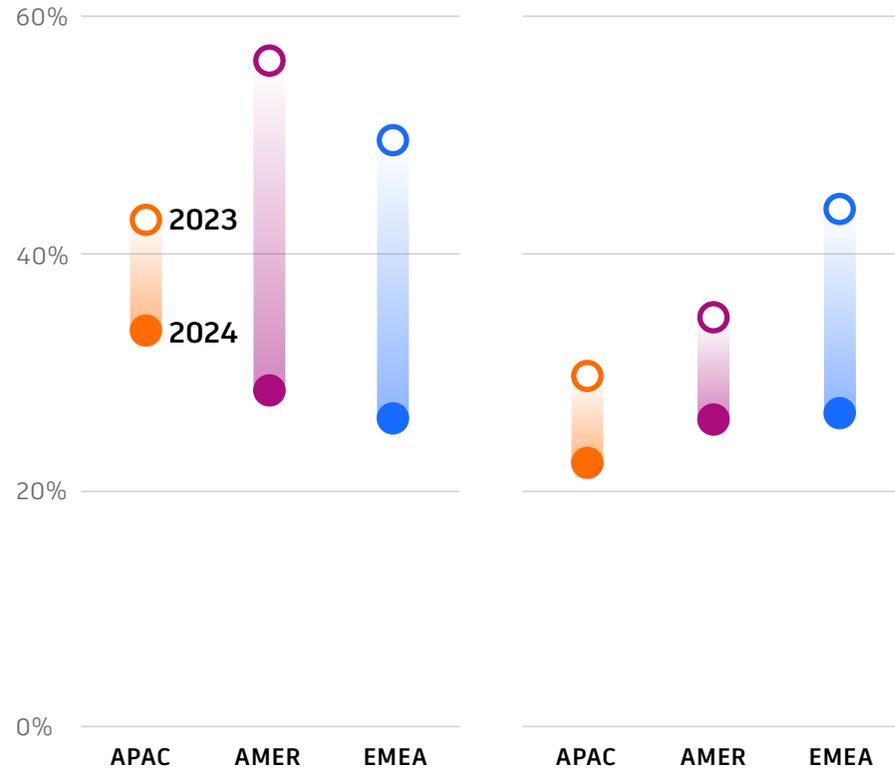


INSIGHT 2

Regional change in talent and global struggles

Attracting, training, and retaining talent

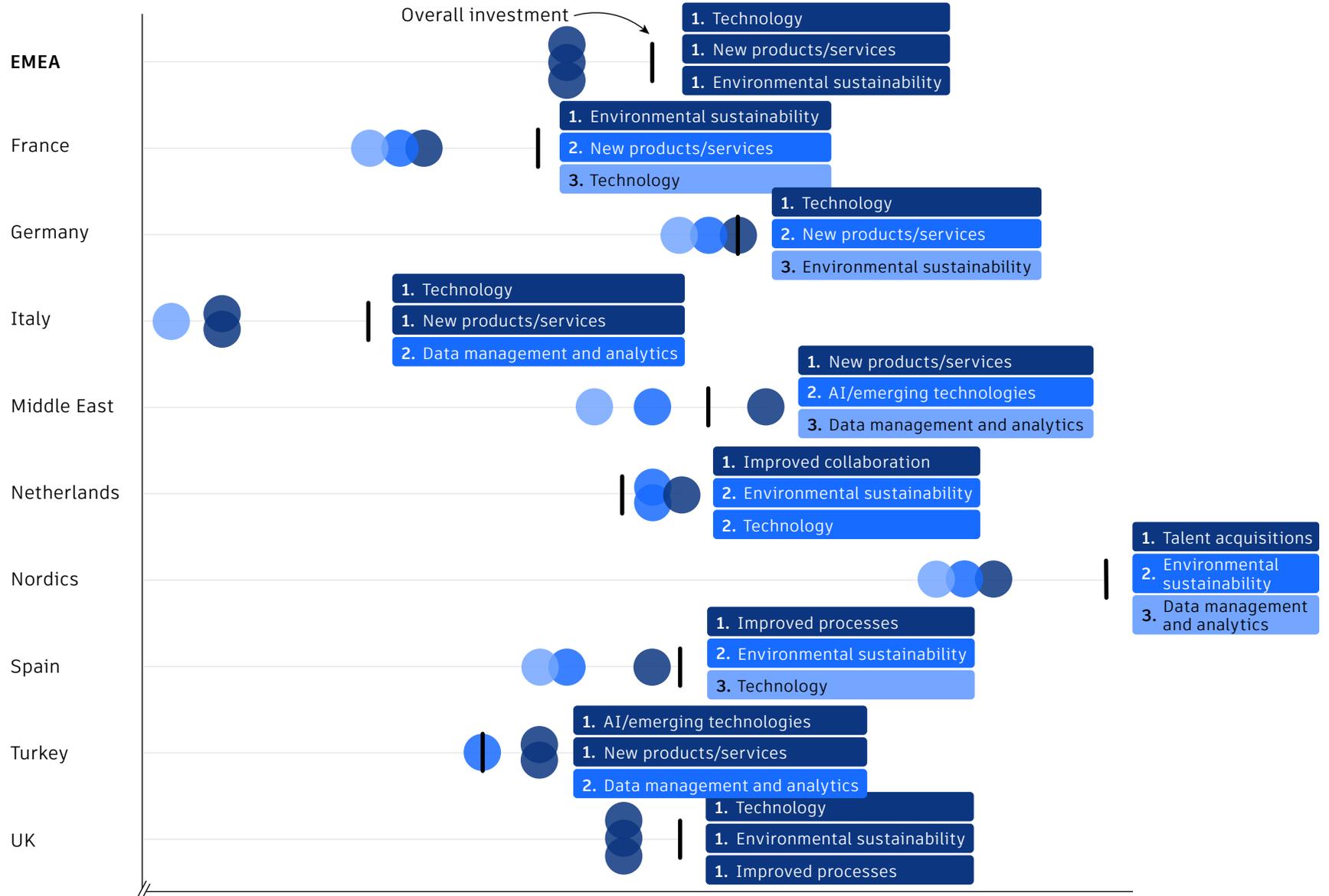
Global economy and events



Percentage of respondents who selected “attracting, training, and retaining talent” and “global economy and events (e.g., wars, pandemics, inflation, strikes)” as their top challenge. Survey question: What are the top 3 challenges your company or organization faces today? 12 response options.

INSIGHT 2

Top priorities for future investments differ among EMEA countries



Axis: Percentage of EMEA respondents who say investments will increase in each area. Survey question: How do you think your company or organization's investment in these areas will shift in the next 3 years? 5-point scale.

INSIGHT 3

Digitally mature companies see greater business success

Companies that invest in digital transformation are seeing dramatic results. They are more competitive in their industries, their employees are more productive, and they see overall better performance than companies with lower levels of digital investment.

These differences are apparent when comparing companies that invest more or less than 45% of their revenue in technology—and the results create a compelling case that effective digital transformation investments are now essential to business success.

At organizations with higher levels of investment in technology, respondents are more likely to rate their performance highly. And at companies with higher levels of investment, respondents feel their organizations are keeping up with changes in their industry.

Productivity gains tied to digital transformation are nothing short of eye-popping. In EMEA, 34% of leaders and experts we surveyed say digital transformation improves productivity. Globally, respondents say their productivity has improved 63%.

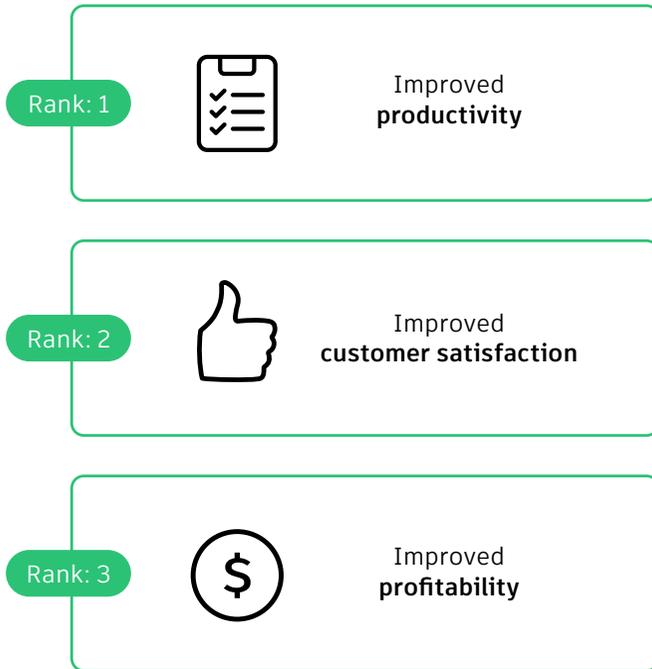
“Basically, all our departments are part of the digital transformation journey and define their transformation initiatives and projects to be considered on the corporate roadmap,” says Robert Grys, project management advisor at Public Works Authority of Qatar (Ashghal). “This is a very interesting phase because for many years we discuss and promote digitalization in construction throughout the lifecycle, but especially in the last twelve months we’ve seen a significant increase in interest and activity.”

“One of our big projects is a new technology hub. It’s co-located in a data center, and moves all the infrastructure from a studio with artists to a purpose-built data center. Now, we’re not looking after server rooms, and this platform consolidates our technology so we can redeploy it dynamically where it’s needed. It’s got all the resilience that you need.”

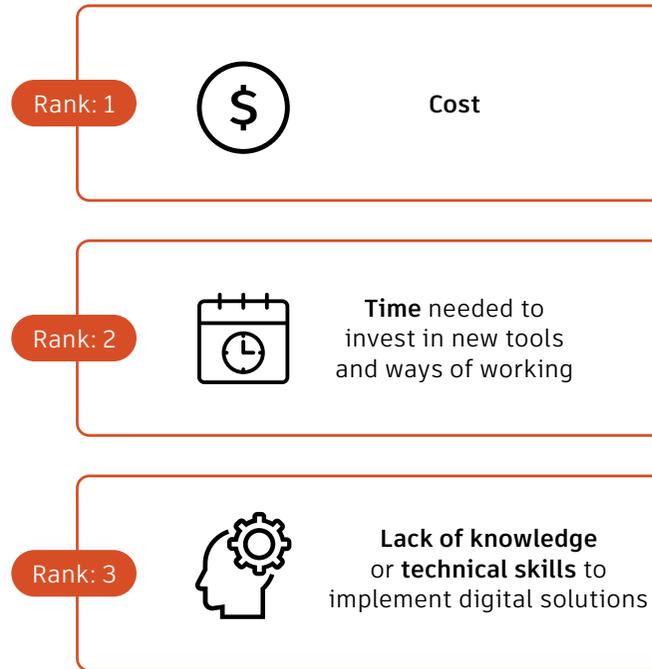
—David Spilsbury, chief technology officer at Axis Studios

Top advantages of—and barriers to—digital transformation in EMEA

Advantages:



Barriers:



Top ranked response to survey question: Has your company or organization experienced any of the following benefits of digital transformation?
 Top ranked response to survey question: What are the barriers to digital transformation in your company or organization?

INSIGHT 3

Benefits to effective digital transformation

In this report, “digitally mature” companies are defined as those that are approaching the goal or have achieved the goal of their digital transformation journey

EMEA respondents from digitally mature companies are more likely than their peers to report that they ...





INSIGHT 3

Barriers to effective digital transformation

The benefits of digital transformation are significant, but a number of barriers are preventing companies from investing at the levels they would like. Thirty-six percent of respondents said that cost was a barrier and 35% felt the time needed to invest in new tools and ways of working was holding them back.

Leaders and experts note that implementing new tools is not enough to drive effective digital transformation.

Rather, these solutions must be accompanied by process improvements and a shift in mindset, both from employees and leadership. “Digital transformation often involves significant changes to processes, technology, and even culture,” says Damir Jaksic, CIO at KEO International Consultants, a design and engineering firm located in the United Arab Emirates. “This is, almost in every case, met with resistance from employees. We’re all comfortable with the status quo. Effectively navigating through this change is critical for overcoming this resistance.”

INSIGHT 3

Digital maturity is now the norm

Perceptions of digital maturity have flipped in just one year.

In EMEA, 67% of respondents say their companies are digitally mature, compared to last year, when 60% rated their organizations as “less digitally mature.” This suggests that digital transformation has reached something of a tipping point—with businesses seeing the positive impact of their digitization efforts, and then continuing to invest to keep up with their peers.

Indeed, effective digital transformation initiatives have now become a necessity for many organizations to stay competitive. “The mindset of leadership can be one of the biggest barriers to digital transformation,” notes Michał Latała of Centralny Port Komunikacyjny, an air, road, and rail transfer hub located in Poland. “You need to invest first before seeing results later. Some leaders don’t see that.”

Some industries report their companies are further along in the digital transformation journey than others.

Percentage of companies that reported they were **approaching their digital transformation goal or have achieved it** (considered digitally mature)

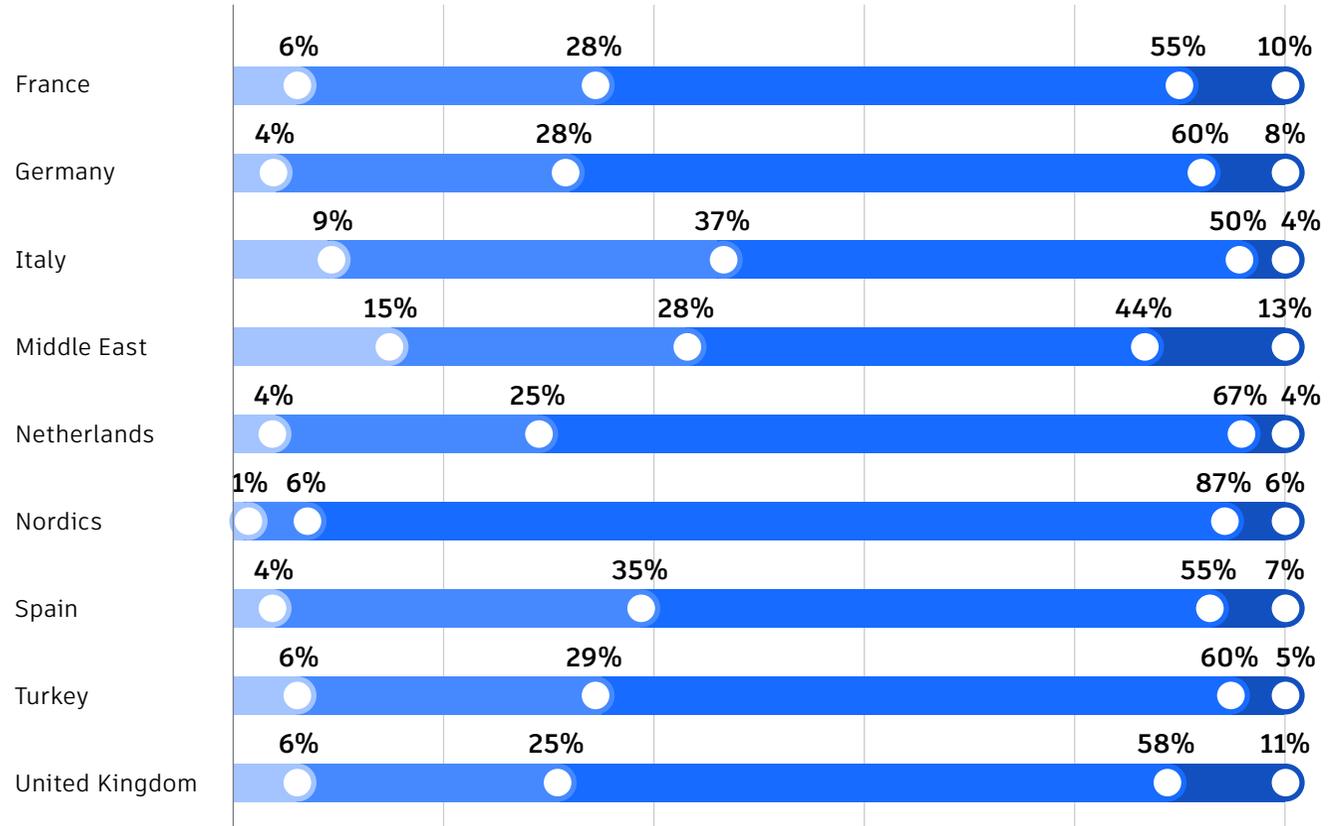
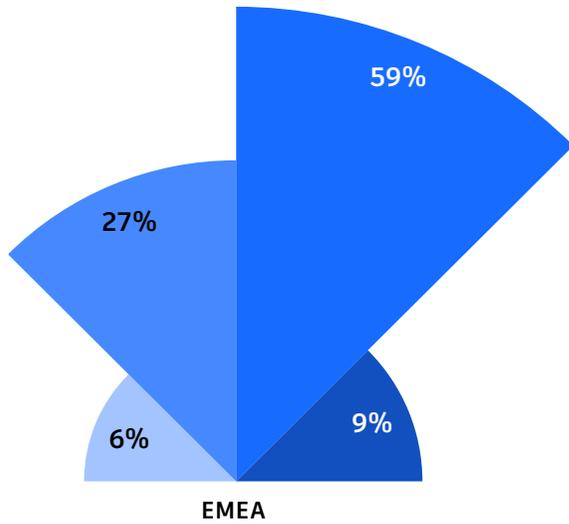
72%
AECO

60%
D&M

71%
M&E

Most EMEA countries are approaching their digital transformation goals

● Early stage
 ● In the middle
 ● Approaching the goal
 ● Achieved the goal



Survey question: Where is your company or organization in their digital transformation journey? 4-point scale. Values do not add up to 100 due to rounding.

INSIGHT 4

Companies are making meaningful progress in their AI adoption journeys

Businesses in EMEA are bullish on artificial intelligence.

Already, companies are uncovering valuable, industry-specific AI applications—with uses ranging from automated transcription of meeting minutes, to robotics, to assistance laying out factory floors. In the future, leaders and experts predict, generative AI will increasingly help human workers make crucial design decisions about physical products, buildings, and digital assets.

“AI is going to be a massive driver for us,” says Severin Tenim, head of strategic projects & development at ALEC Engineering & Contracting, a leading tier 1 construction and contracting firm located in the United Arab Emirates. “I think every organization in the world is going to be impacted—it’s just a question of the extent. We’re identifying use cases where we can eliminate very manual or antiquated workloads. We use a number of AI point

solutions at the moment for transcribing meeting minutes, logging action items, and extracting the sentiment of meetings, amongst others.”

In EMEA, 60% of respondents say they are approaching or have already achieved their goal of incorporating AI into their companies—a perhaps surprising number, given that AI is still an emerging technology. An even larger portion say that AI will enhance their industry and be “essential across the board” within two to three years.

The response to Autodesk’s AI-powered tools indicates a similarly strong level of interest in the technology. The beta version of AI-powered workflows in Autodesk Maya, which automate how artists manage their scene data, saw a 60% increase in just a few months—a spike that is unprecedented in the history of the company’s beta launches.

While much of the conversation about AI in design and make industries centers on generative design, companies are also exploring use cases that streamline or enhance back-office processes. “There are plenty of use cases for AI, especially when it comes to contracts, compliance, and risk assessment,” says Robert Gryns, project management advisor at Public Works Authority of Qatar (Ashghal). “In a construction project you could have AI to review the tender documents whether the scope of work is compliant with your corporate BIM standards. During evaluation stage, you could ask the AI to check whether the proposals are responding to the tender requirements like scope of services or required resources which the contractor needs to provide. Normally, you would need a human to read hundreds of pages of contracts.”

Overall, the top use cases for AI today are increasing productivity and automating mundane, repetitive tasks.

82%

are confident that their company will make the **right decisions** regarding AI

82%

agree AI will **enhance** their industry

82%

agree AI will make the industry more **creative**

66%

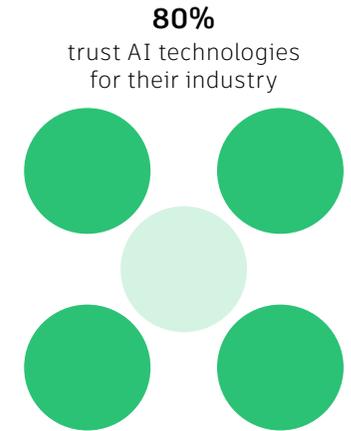
agree in 2–3 years, AI will be **essential** across the board



INSIGHT 4

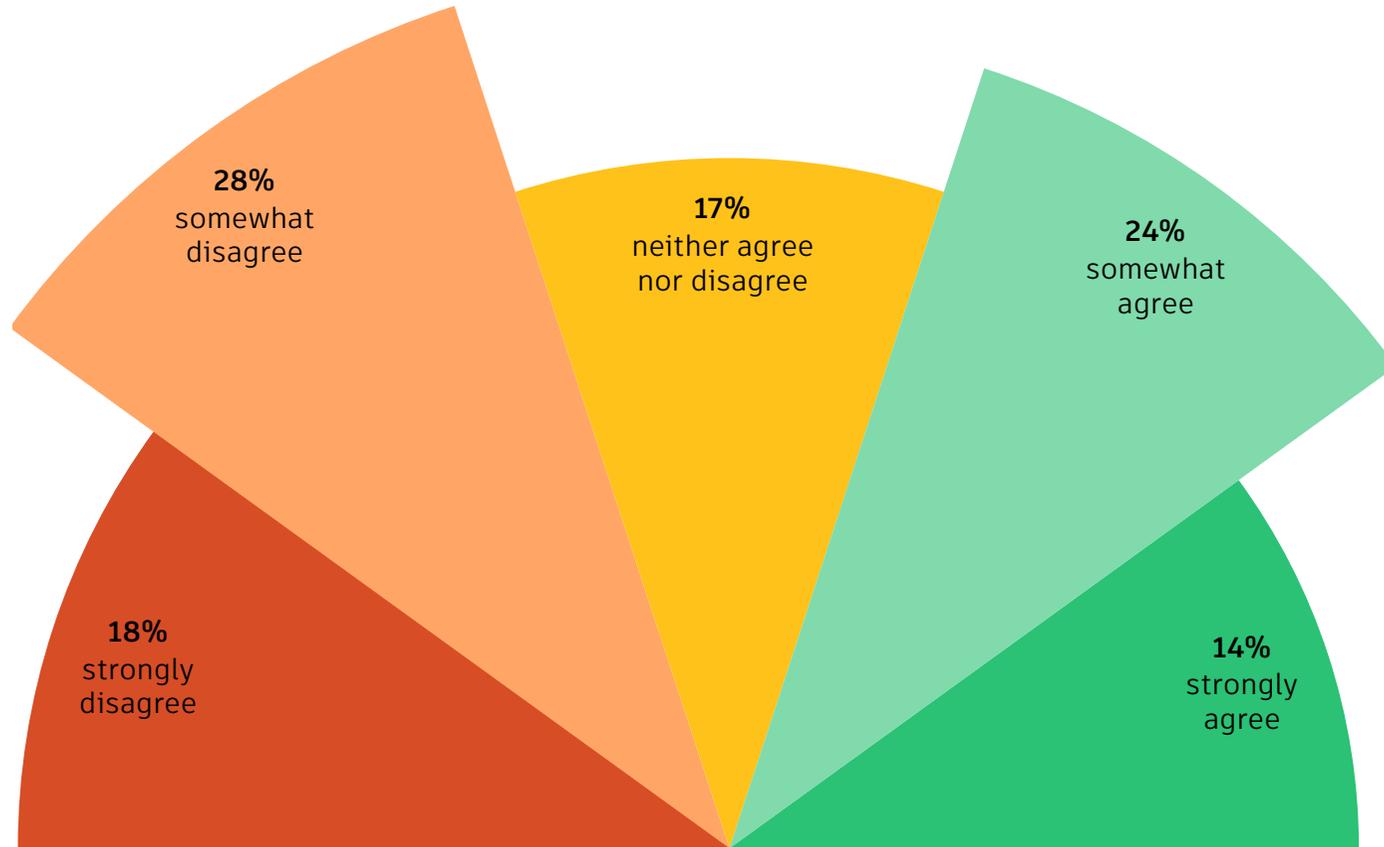
AI as trusted tool vs. AI as threat

Trust in AI is extraordinarily high, with 80% of respondents in EMEA saying they trust the technology for their industry. However, this statistic is undercut by a vein of cautious skepticism running through interviews with business leaders and experts. Some express doubts that firms are going to be able to trust the technology enough to sign off on critical deliverables, noting that existing AI tools often present errors as facts. Others think that current levels of optimism will dim if bad actors misuse the technology, and 38% of respondents say AI will destabilize their industry.



Opinions are split on the destabilizing effect of AI

Percentage of EMEA respondents who agree that AI is a threat



Survey question: When you think about artificial intelligence (AI) in your industry and company, to what extent do you agree or disagree? AI will destabilize my industry. 5-point scale.

INSIGHT 4

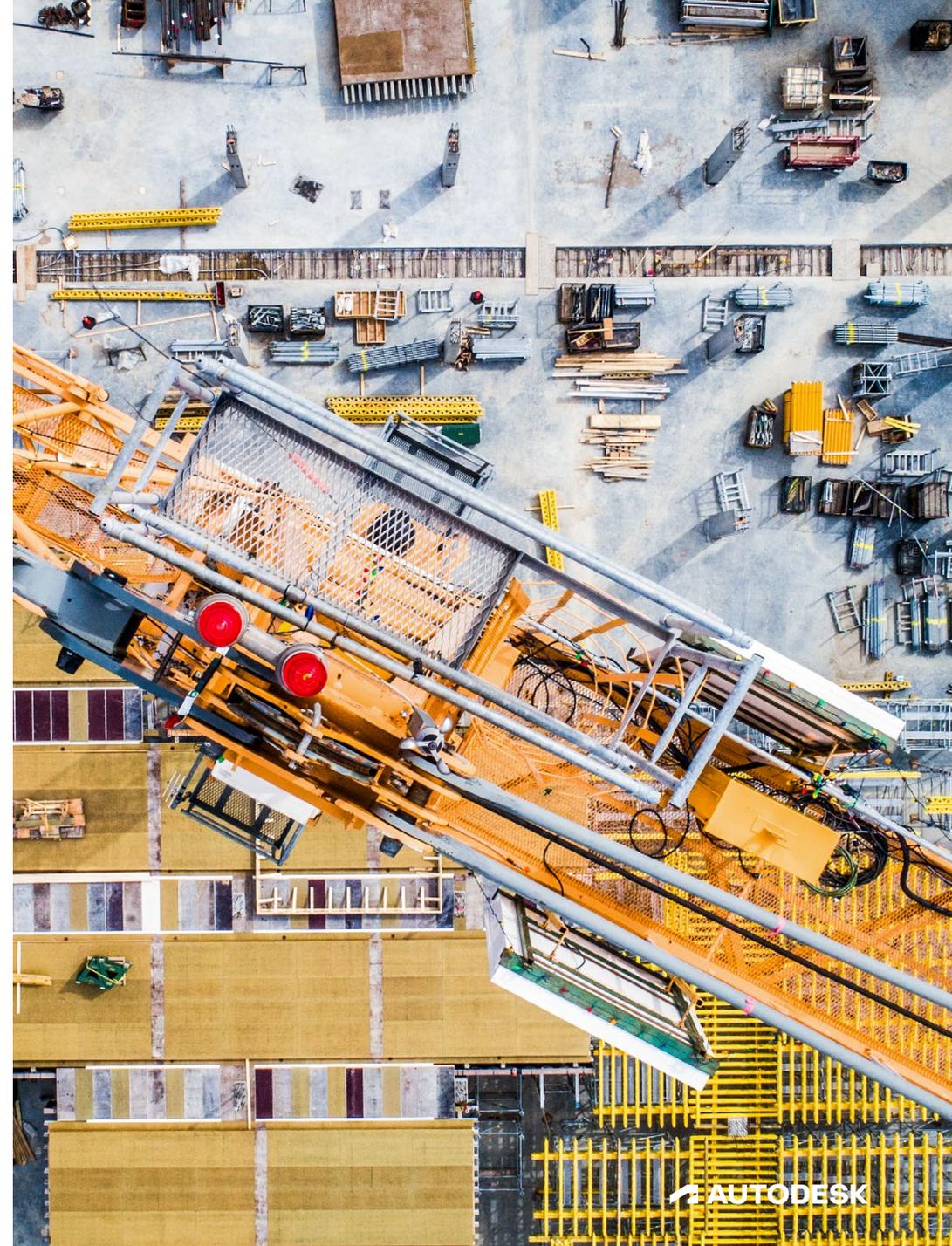
AI adoption by region and country

Companies are already exploring different ways to use AI. But regulations around the world have a direct impact on the speed of adoption. “You do need guardrails,” says David de Graaf, global director of digital at Royal HaskoningDHV, a consultancy engineering firm providing solutions for the natural and built environment located in the Netherlands. “The European Union is establishing a new act to regulate AI, including the use of ChatGPT and facial recognition. The US, UK, and China are also rushing to create guidelines. That makes it more difficult for international companies to adopt AI.”

A number of core challenges must also

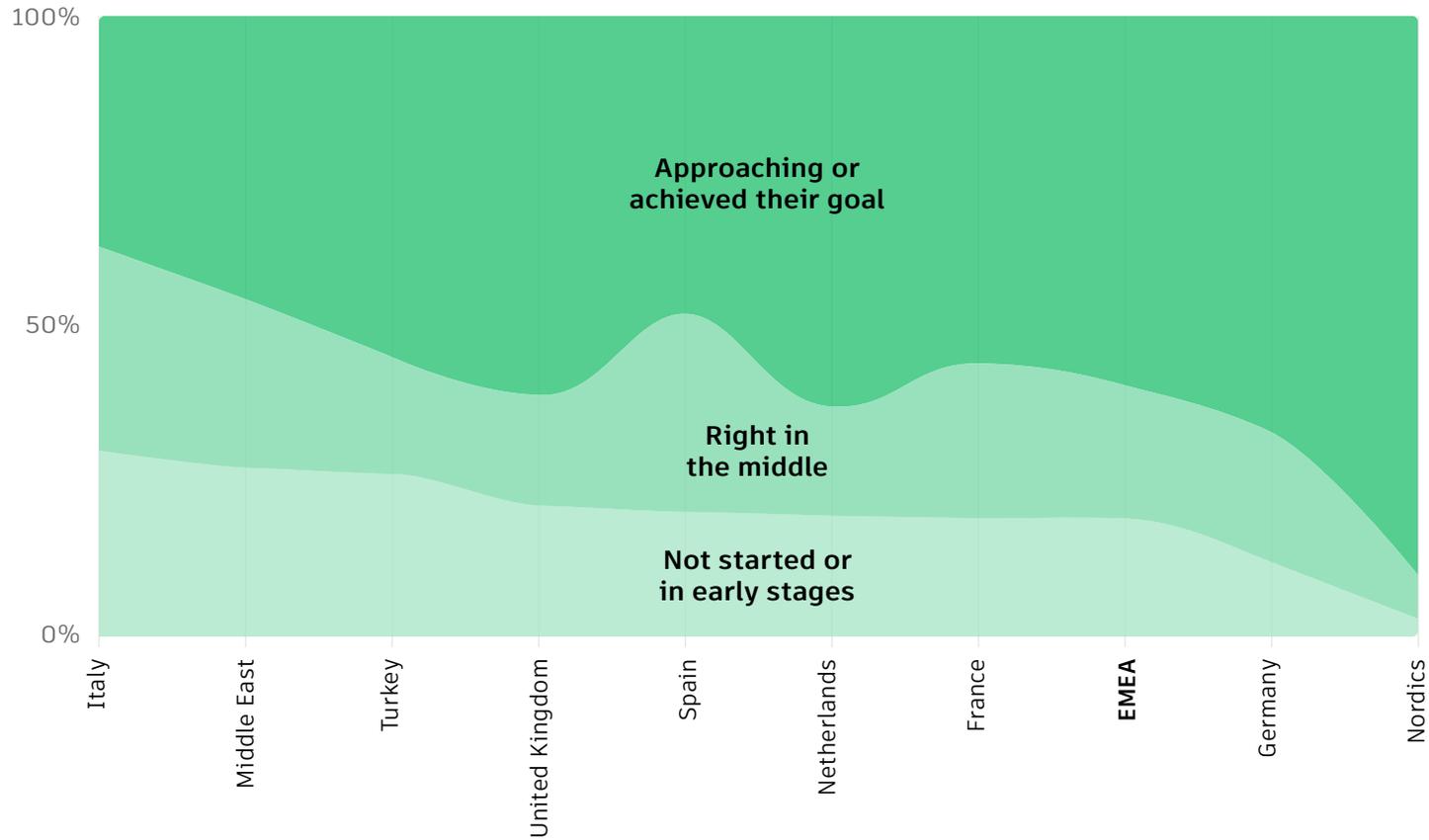
be solved before leaders and experts feel comfortable using AI to its fullest potential. “I want to trust AI, but I think we have to challenge it,” says Michał Latąta of Centralny Port Komunikacyjny. “I’m not surprised by a high general level of trust in AI because I think everybody is very happy with ChatGPT and the chat experience. But without understanding how AI works, we won’t know what the risks and weaknesses are.”

Nonetheless, in Autodesk’s cross-industry generative design and AI-enabled products, user engagement increased by 24% from January 2023 to November 2023 (though this does not take overall subscriber growth into account). APAC led the way with a 55% increase in user engagement.



INSIGHT 4

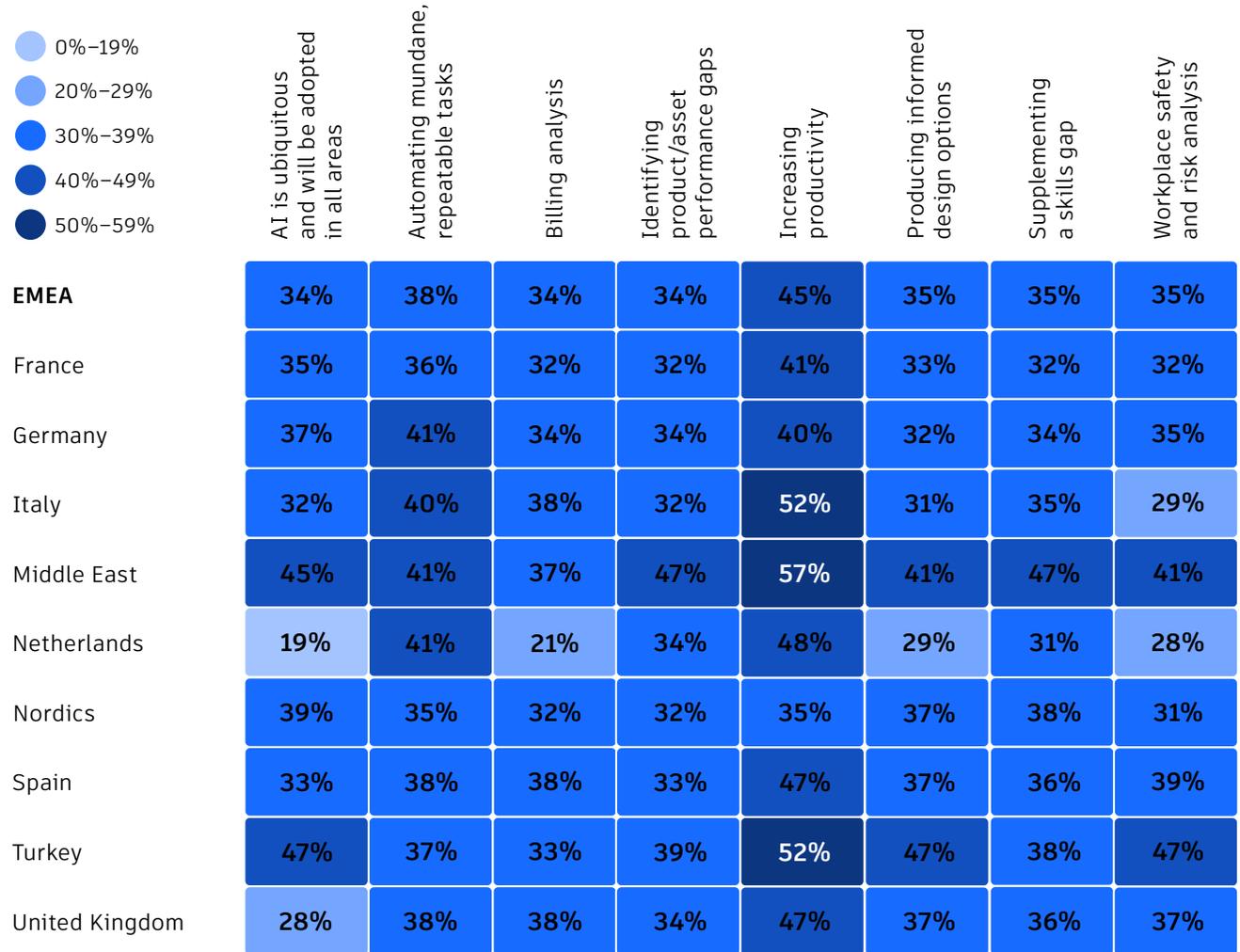
AI adoption varies greatly among EMEA countries



Survey question: Where is your company or organization in incorporating artificial intelligence (AI) technology? 5-point scale.

Beyond productivity, AI use cases vary

Percentage of EMEA companies that use AI



Survey question: What are the use cases for artificial intelligence (AI) in your company or organization? Select all that apply.

Talent

Bridging the talent gap





TALENT

Companies tackle talent challenges with upskilling, digitization, and sustainability initiatives

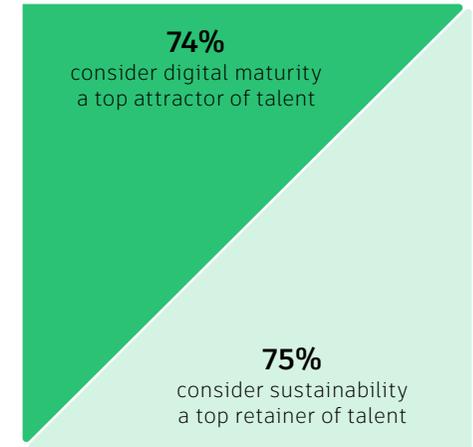
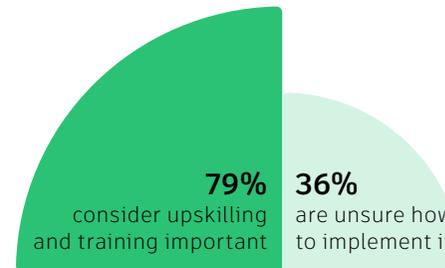
Competition for top talent is less intense this year—but it's not over.

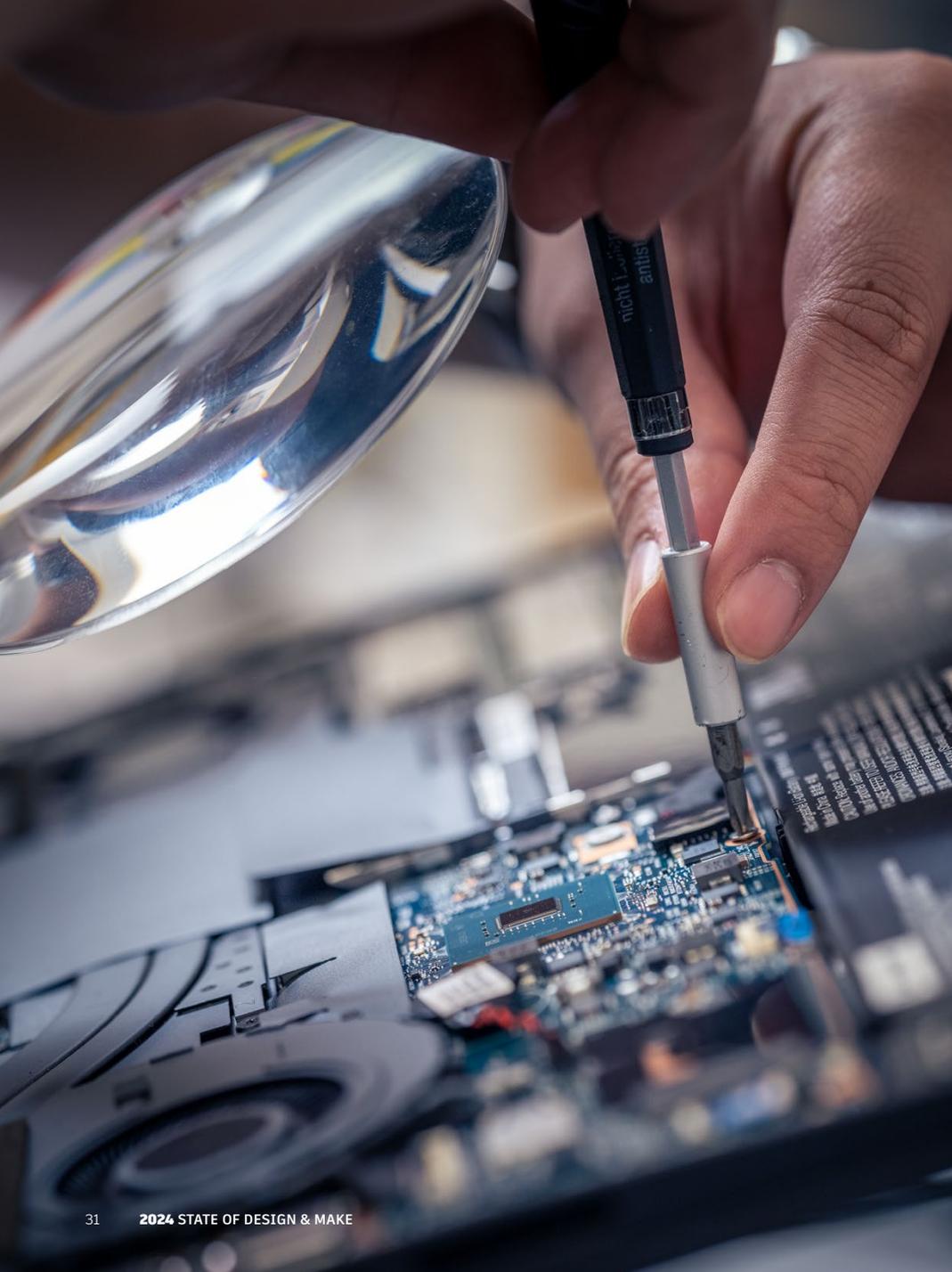
Although talent is no longer considered the top business challenge for leaders in EMEA, attracting and retaining skilled employees is still top of mind for most organizations.

The global talent shortage is not as acute as it was last year, according to the business leaders and experts we surveyed. Still, respondents say their companies are shoring up remaining talent gaps through a mix of training, digitization, and other means.

“We’re investing heavily in our own workforce,” says Damir Jaksic of KEO International Consultants. “We have training and upskilling programs focused on not only technical training and how to use the latest technologies, but also leadership and soft skills like communication and problem-solving.”

Companies recognize the importance of developing talent but don't have the resources to do it





INSIGHT 5

Upskilling is essential but out of reach for many

Leaders want to train and upskill their workforces, but not everyone knows how, and many organizations lack the expertise needed to design effective internal training programs.

Seventy-nine percent of survey respondents agree that upskilling is important, but only 48% say their organizations have the necessary skills and resources to design internal training programs. However, these limitations are not stopping companies from offering any training at all—74% are implementing continuous learning at their organizations.

To bridge the training gap, some companies are bringing in outside help in the form of third-party training platforms. “We’ve opted for self-driven training over classroom training,” says Richard Matchett of Zutari. “We have a very robust training system and structured online courses, and we’ve got open availability to all of this training for our team.”

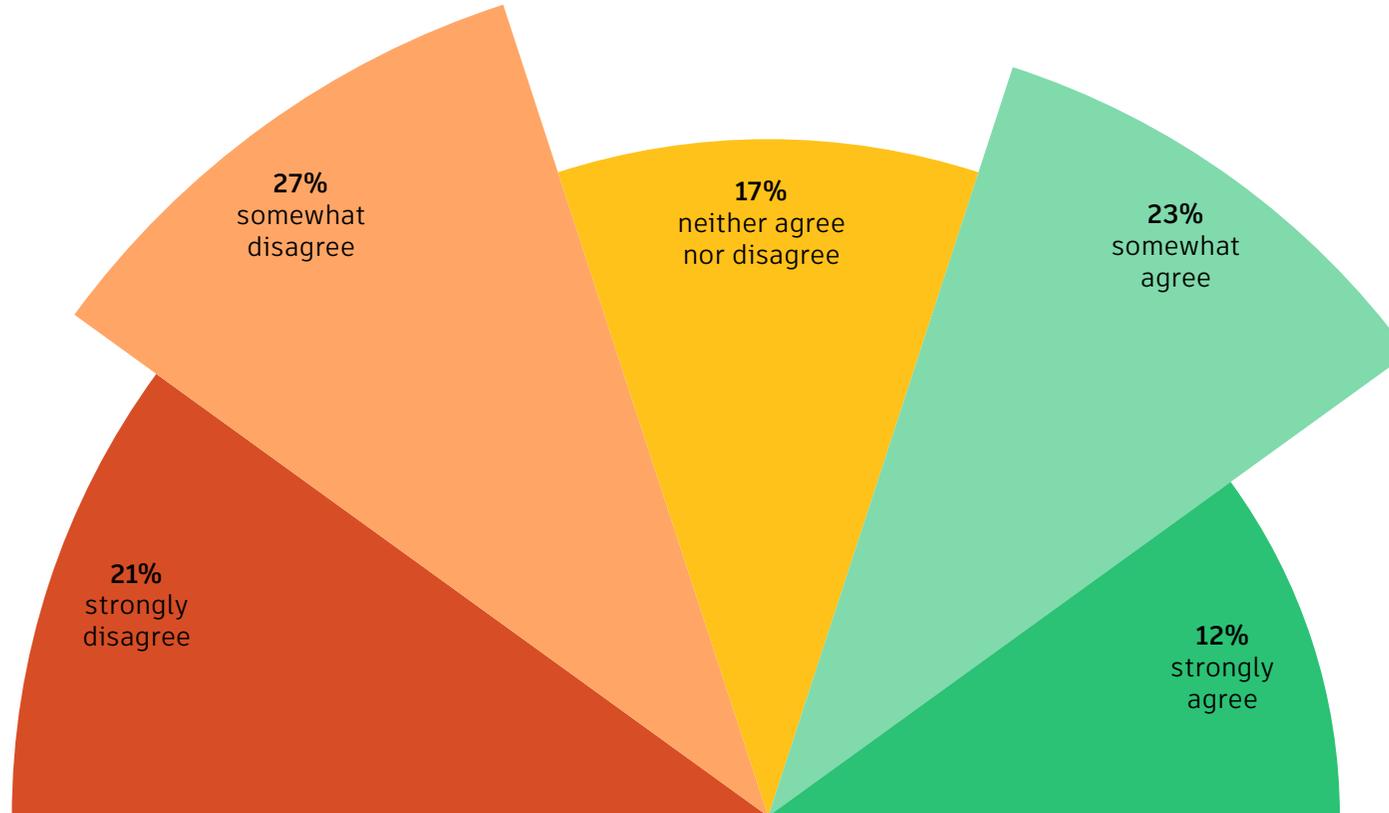
Other self-directed learning methods include in-product training for learning digital tools, which already show a level of success—and often at a lower cost than formal training programs. For example, Autodesk’s anonymized AutoCAD data shows users are 35% more likely to learn a new command after seeing a personalized insight recommendation.

Michael Dufhues, board member at Bremer SE, a construction services firm, points out that training challenges are not always related to a lack of budget or resources. “One of the biggest challenges is the speed of innovative technologies. Every two months, a new feature is released, and employees are not able to catch up. Companies will have to struggle if managing directors don’t stick to clear visions, that don’t change with every update.”

INSIGHT 5

Companies lack resources or skills for internal training programs

Percentage of EMEA respondents who agree they don't have what they need



Survey question: My company doesn't have the skills or the resources to design internal training programs. 5-point scale. Values do not add up to 100% due to rounding.

INSIGHT 5

Digital skills in demand

The ability to work with AI has emerged as the top digital skill that organizations are looking for—followed by digital design and software development/programming.

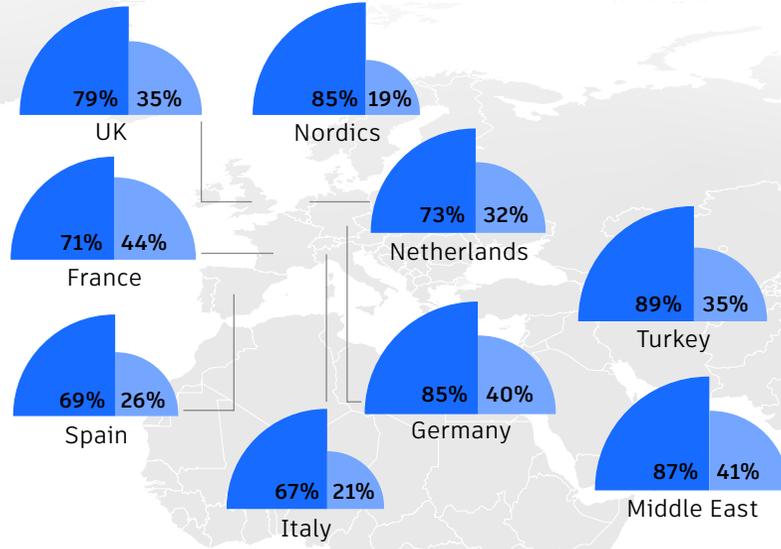
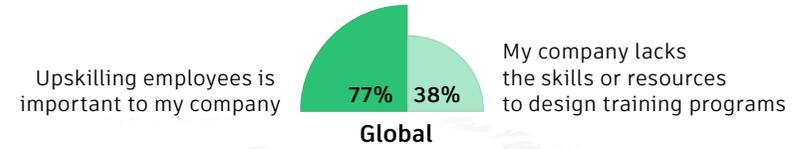
Industry professionals say that these skills are essential to unlocking the digital transformation benefits discussed above.

For instance, Michał Latała of Centralny Port Komunikacyjny notes that firms that lack digital expertise may find themselves at a disadvantage—especially when competing against companies that have made proactive investments in employees with advanced digital skills. “If you are not hiring digital experts, you will not be selected for certain projects, because there are other companies that are ready,” he says.



The upskilling gap

EMEA companies value training but lack resources



Percentage of respondents who agree with statements: 1. Upskilling employees is important to my company. 2. My company doesn't have the skills or the resources to design internal training programs. 5-point scale. Top two= agree.

INSIGHT 6

Companies are taking a multipronged approach to solving the talent problem

Across the board, companies are facing far fewer challenges this year when it comes to talent. In fact, the number of respondents citing access to skilled talent as a barrier to growth dropped to 26%, down from 49% last year.

Part of this shift may be due to changes in macroeconomic conditions, with some major companies initiating large rounds of layoffs in the past year. However, businesses are also taking steps to strengthen their company culture to attract potential recruits, help existing employees become more productive, and convince workers to stay for longer.

Employees are attracted to organizations that give them the tools to be productive and successful in their jobs, as well as those whose actions align with their own values. Seventy-four percent of respondents say digital maturity helps them attract talent, 75% say sustainability efforts attract and help retain talent, and 65% say sustainability efforts impact job satisfaction.





INSIGHT 6

The most common ways companies are bridging the talent gap is by amping up their talent recruitment efforts and by diversifying their training and upskilling efforts.

These include training programs, online courses, and diverse forms of self-directed learning such as in-product cues, whose success makes them a viable alternative to traditional software courses. For example, anonymized Autodesk data shows that Revit and AutoCAD users are more likely to adopt learning recommendations viewed in-product than through other channels—Revit users had a 123% increase in adoption compared to a 55% when viewing learning recommendations through the account portal. AutoCAD users also saw a 44% increase for adoption with in-product recommendations compared to the 35% increase with the account portal.

Competitive salaries and benefits, a more transparent and efficient hiring process, remote work, and fostering diversity and inclusion are also top tools for attracting a broader range of skilled individuals.

David Spilsbury of animation and VFX studio Axis Studios cites flexible work opportunities as a draw for talent in his field. “You can work remotely full time in our industry, which removes barriers like commute times,” he says. “We’ve supported the hybrid working model and used it as a retention method—not forcing people back into the studio, but allowing them to come back in for screenings, events, and review sessions where it does make sense to be together.”

Others note the importance of having a strategy to address talent leaving the company or industry. “The younger generations have a much higher turnover,” says Lisette Heuer, director of business transformation at Royal HaskoningDHV “That in itself is a change management challenge—we need to have faster onboarding and better knowledge management systems so that when someone leaves, the disruption is not as severe, and work will continue.”

INSIGHT 6

Taking action on talent

Companies are taking diverse steps to tackle their talent challenges.

Organizations that struggle to attract skilled workers and those with an aging workforce are largely focusing on expanded recruitment and training. For those with high rates of attrition, the focus tends to be more on providing career advancement and development opportunities, as well as on compensation and benefits.

Notably, a significant share of respondents who say their companies struggle with talent also say that their companies are not doing anything to solve the problem.



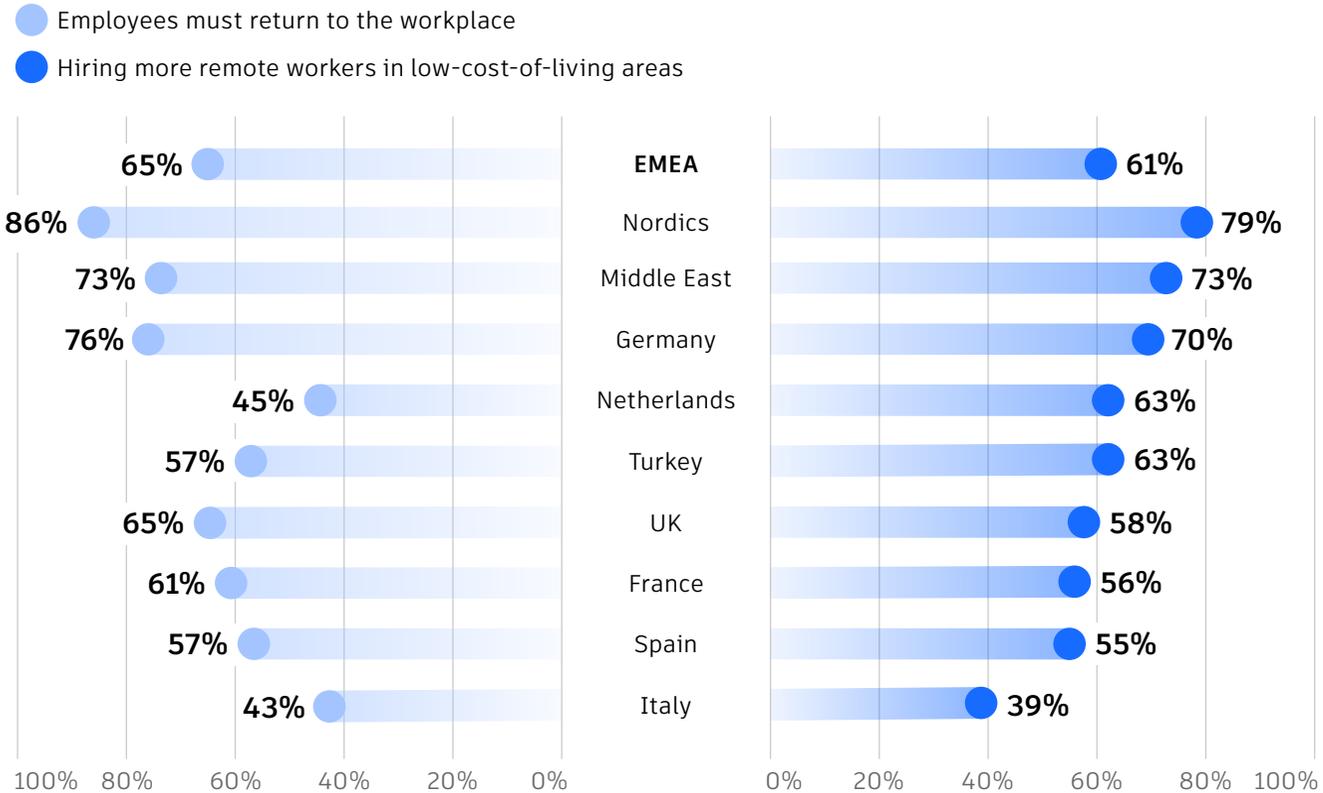
INSIGHT 6

Workers return to the office, but remote hiring continues

Survey data shows a mixed picture regarding remote work. In EMEA, 65% of respondents say their companies are mandating a return to the workplace, signaling that employers are not yielding to workers' preferences in the race for talent. However, 61% say their companies are seeking remote talent from low cost-of-living areas, a seeming contradiction. Most likely, this suggests that companies are hiring remotely to save on costs while also mandating return for employees who live close to a workplace.

The push and pull of the new normal in EMEA

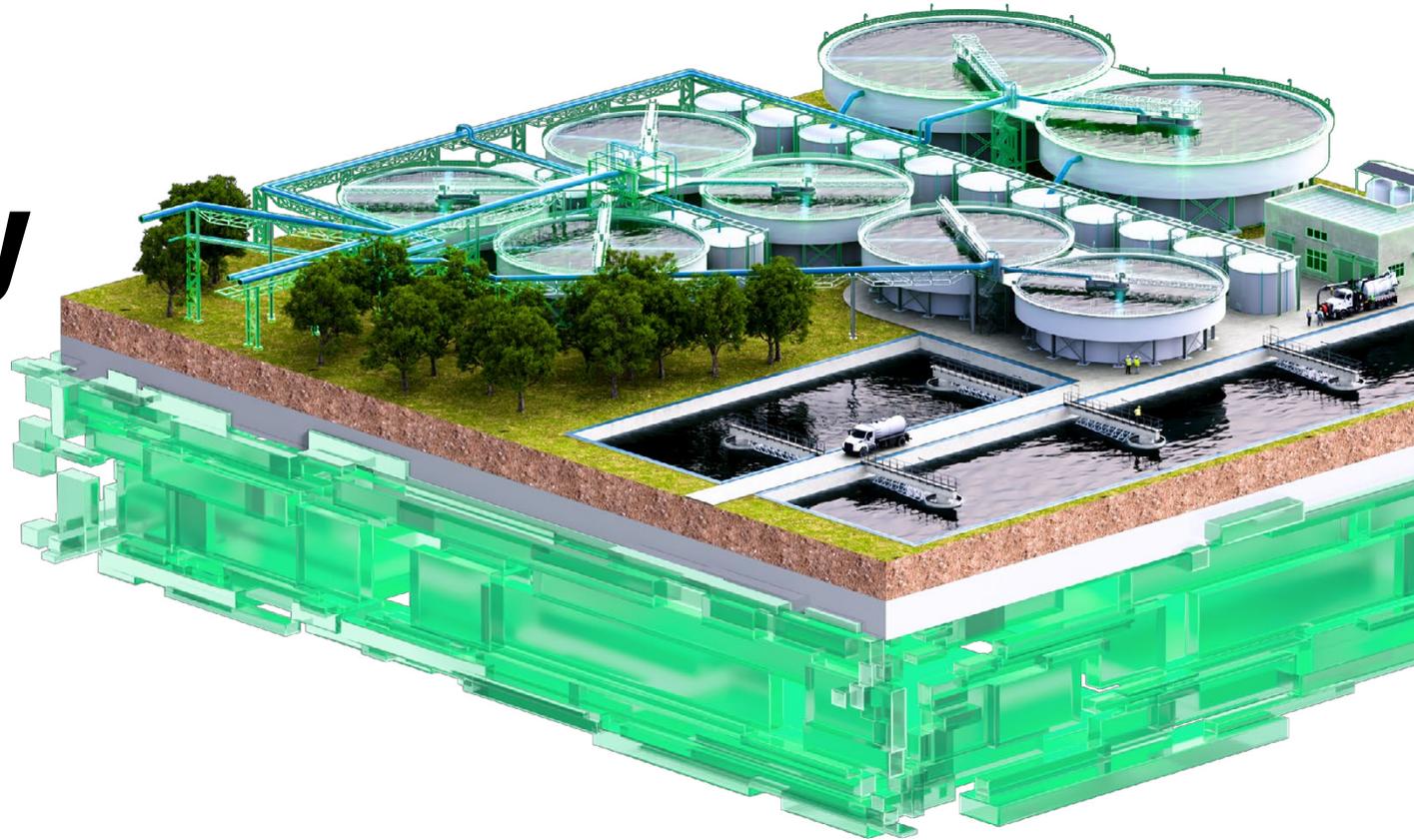
Companies are both hiring remote workers and mandating employees return to the workplace



Percentage of EMEA respondents who agree with statements: 1. My company is mandating that employees return to the workplace. 2. My company is looking to hire more remote workers in low-cost-of-living areas. 5-point scale. Top two= agree.

Sustainability

Business value drives
sustainability actions





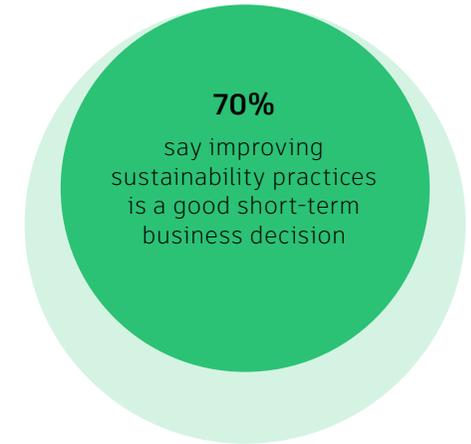
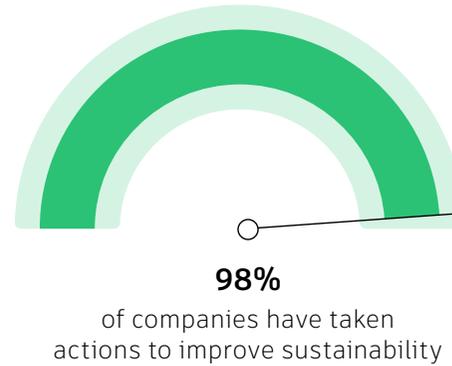
SUSTAINABILITY

Attitude and action

Sustainability is now a key concern for employees, customers, and investors in EMEA—as well as an important driver of business success.

Shifting attitudes about sustainability are driving action, with companies making investments in energy efficiency, materials reduction, and more sustainable processes that are better for both the environment and the bottom line.

“Sustainability is a challenge for our industry,” says Damir Jaksic of KEO International Consultants. “We are under pressure to design and construct sustainable buildings and infrastructure, and this requires a shift in mindset and willingness to adopt new technologies and new approaches for which we may not be ready.”



INSIGHT 7

Companies are taking sustainability seriously

Ninety-eight percent of organizations are taking steps to improve sustainability—up from 96% last year.

Thirty-one percent of these companies are using AI to become more sustainable. This makes sense, as the bulk of a project's or product's sustainability impact is determined during the conceptual phase—a part of the process when organizations can use AI tools to optimize their decision-making for specific outcomes, including sustainability.

Top changes include increasing share of

renewable energy sources used, investing in more energy-efficient processes or machinery and decreasing waste from production and construction. Notably, use of these methods is varied across the board. This suggests that organizations are only taking actions that will be effective in their specific settings, rather than simply adopting broadly popular tactics.

Damir Jaksic of KEO International Consultants, says the firm is upping its use of recycled content and locally sourced materials. “We are increasingly specifying the use of sustainable materials

in our projects, such as recycled content, locally sourced materials, and materials with a low environmental impact,” he says. “We have around 80 sustainability professionals who are on the same floor as the designers, so there are a lot of collaboration opportunities.”

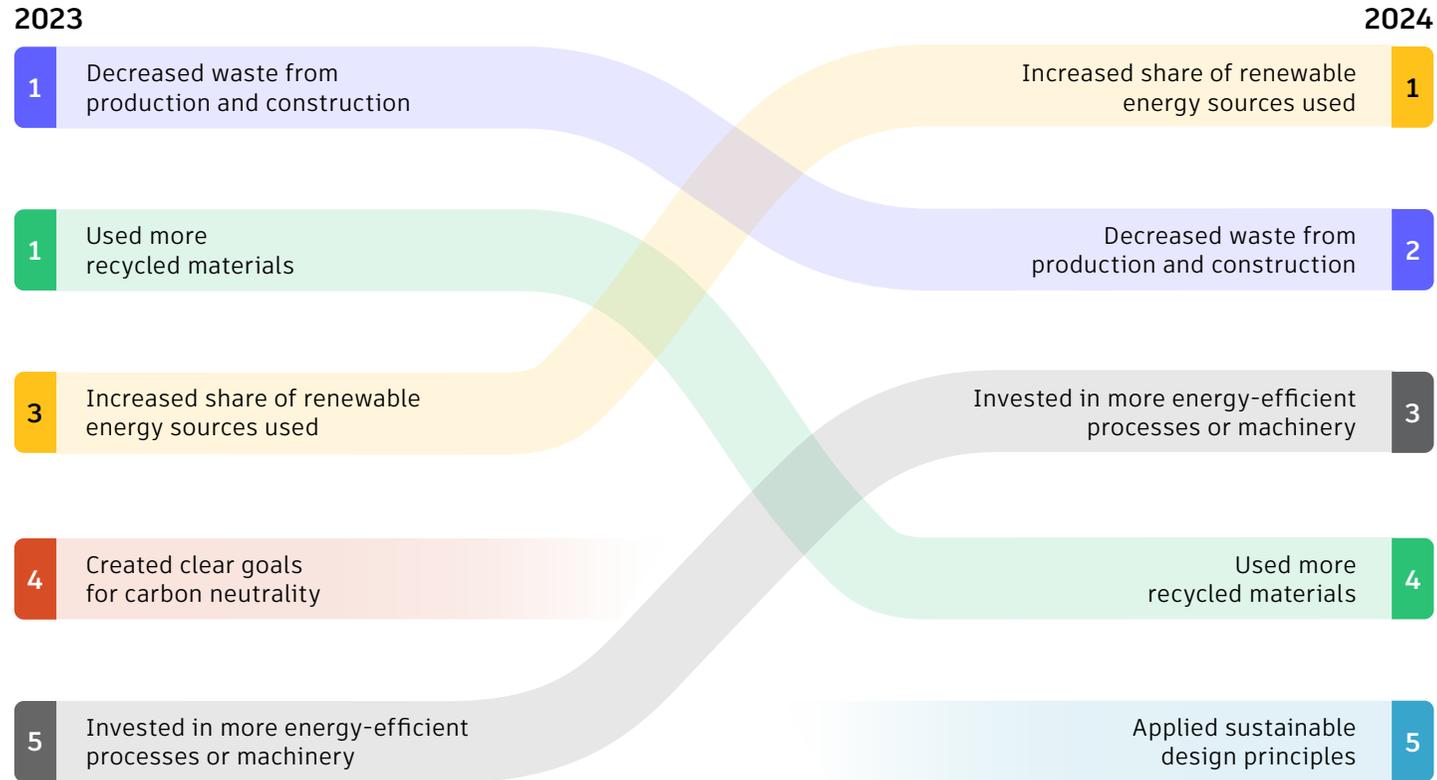
These actions are consistent with Autodesk data showing that user engagement with Autodesk products that enable sustainable outcomes increased by 14% across industries from January 2023 to November 2023.



INSIGHT 7

Renewable energy use tops sustainability action

Top 5 actions showing year-over-year change in EMEA



Survey question: What changes has your company or organization already made to be more sustainable? Select all that apply

INSIGHT 7

Changing sentiment

As organizations take more sustainability-focused actions, leaders and experts report significant changes in how they feel about their companies' efforts.

This year, 81% of respondents are proud of their company's sustainability efforts, up significantly from 54% in 2023. This is a seismic shift in sentiment, and is reflected in interviews with business leaders and experts, who largely say that their companies' leadership, employees, and customers are united in their desire to improve sustainable outcomes.



INSIGHT 7

Top motivators

Gone are the days when sustainability was seen primarily as a concern for government regulators. Customers, employees, and investors are all becoming more influential motivators as companies pursue their sustainability goals.

Globally, just over four out of five respondents say they face pressure from each of these groups to be more sustainable, a sentiment that is also reflected in interviews. “Some customers say, ‘We want the greenest building ever,’ and will put an extra €10 million into the project to install the best sustainability features in that building,” says Michael Dufhues, board member at commercial construction company Bremer SE. “It’s about what the customers want. The market dictates the decision.”

Government regulation trails slightly behind, with three-quarters of respondents globally saying their companies face government pressure to be more sustainable.

“There are many sources of pressure to be more sustainable—there’s media pressure, corporate pressure, new regulations, and incentives from the European Commission or governments,” says Jean-Francois Guiderdoni of robotics solutions for water management company ACWA Robotics, located in France. “Both governments and companies are starting to look beyond just rules and negative financial impact; they’re realizing there’s a lot of economic potential in sustainability. It’s actually creating value and generating a virtuous cycle.”

36%

of experts and leaders in EMEA say that employees are “very influential” in motivating them to create and meet sustainability goals

Respondents felt these groups were influential to their sustainability actions:

84%
customers

82%
investors

82%
employees

77%
government

INSIGHT 7

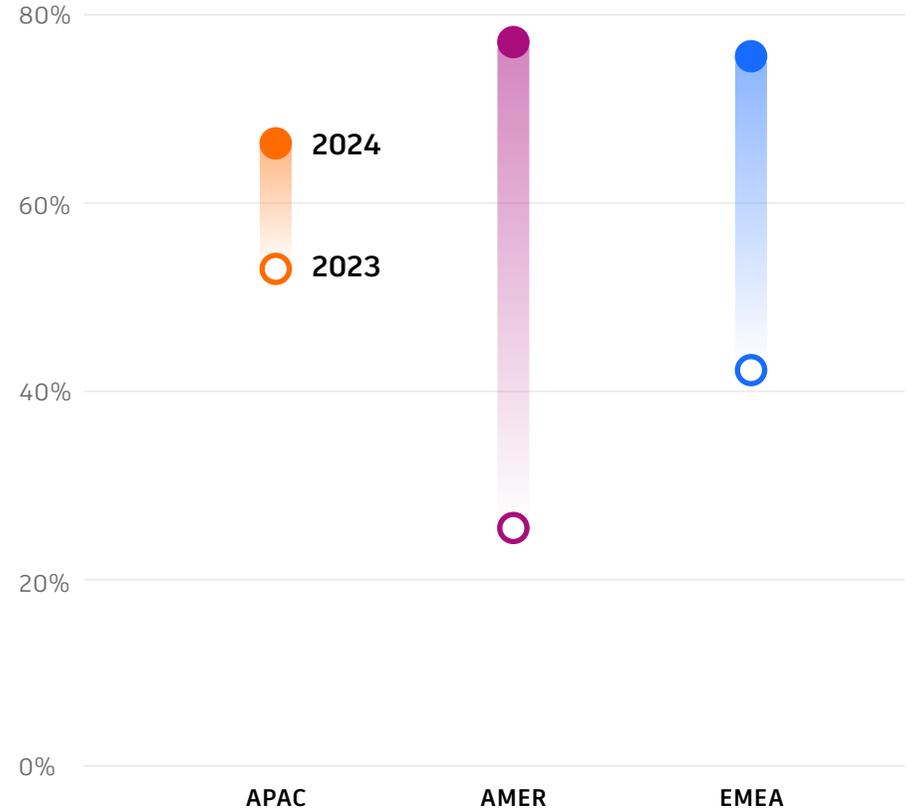
Becoming sustainability leaders

At 76%, the majority of EMEA leaders and experts now see their companies as leaders in sustainability.

This new viewpoint is reflected in interviews where leaders and experts tend to speak of their organizations' sustainability efforts not as a burden, but rather as a source of pride for employees and a necessary step to stay

competitive in the future. "Everybody looks at sustainability from an environmental perspective," says David Spilsbury of Axis Studios. "But we want to be socially sustainable as well. We want to build an industry where there is a career path and we have people from all generations and all walks of life included in our workforce. That's good for creativity, and it's good as a sustainable social environment for our business."

Companies increasingly see themselves as sustainability leaders



Survey question: My company is leading the way in this industry when it comes to sustainability initiatives. 5-point scale. Top two = agree.

INSIGHT 8

Sustainability is proving its value to both short-term and long-term business health

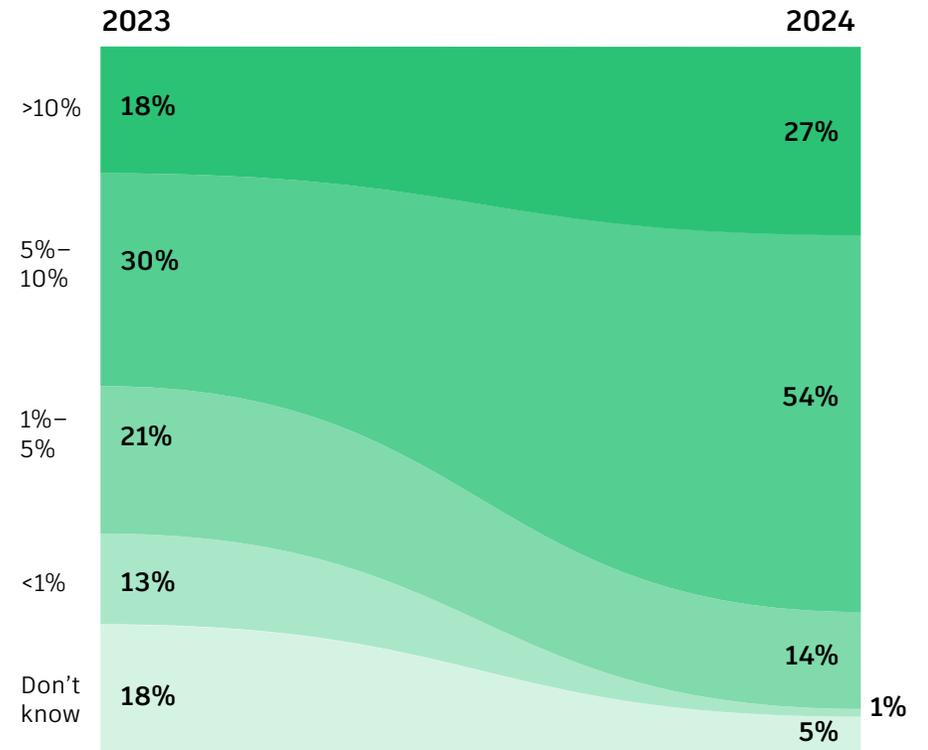
What was true last year is even more true this year: sustainability is seen as beneficial to the bottom line.

Seventy percent of leaders and experts in EMEA say sustainability is good for short-term business. Over the long term, 88% believe sustainability is beneficial.

While some of this business value is likely due to an improved reputation with customers and employees, sustainability initiatives also present an opportunity to decrease operating costs through reductions in energy use and materials.

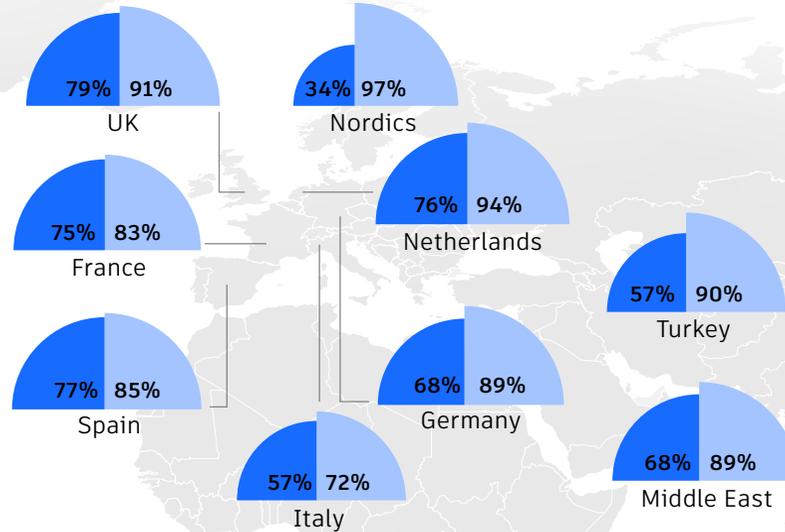
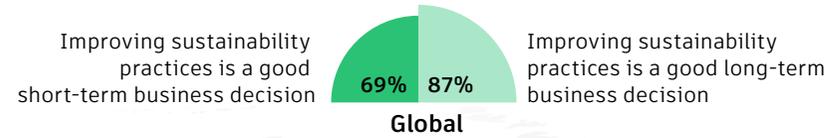
“Sustainability is a no-brainer,” says Severin Tenim of ALEC Engineering & Contracting. “Companies that think it’s optional are deluded. Sustainability goes beyond the environment. Your business model needs to be sustainable; your staff retention needs to be sustainable; your ability to deliver reliably needs to be sustainable; your pipeline of work needs to be sustainable. Every single business in the world needs to be sustainable.”

Sustainability initiatives drive long-term revenue in EMEA



Survey question: To the best of your knowledge, how much business value (as a % of annual revenue) can sustainability measures generate in the long term for your company? 5-point scale.

Long-term vs. short-term business value of sustainability: EMEA countries



Percentage of respondents who agree with statements: 1. Improving sustainability practices is a good long-term business decision. 2. Improving sustainability practices is a good short-term business decision. 5-point scale. Top two = agree.



Conclusion

Business leaders in EMEA continue to face challenges in hiring and cost management, though there is renewed optimism and a greater sense of resilience after enduring—and overcoming—pandemic supply chain disruptions and seeing the global economy avoid a global recession.

Approaches to building business resilience are diverse, and budgets are shifting to reflect changing priorities. To address continued hiring challenges, some organizations are investing heavily in training and upskilling their current workforce along with technology to help fill the skills gap. Almost universally, organizations are increasing their investments in AI, signaling a high level of trust for emerging technology, although concerns remain.

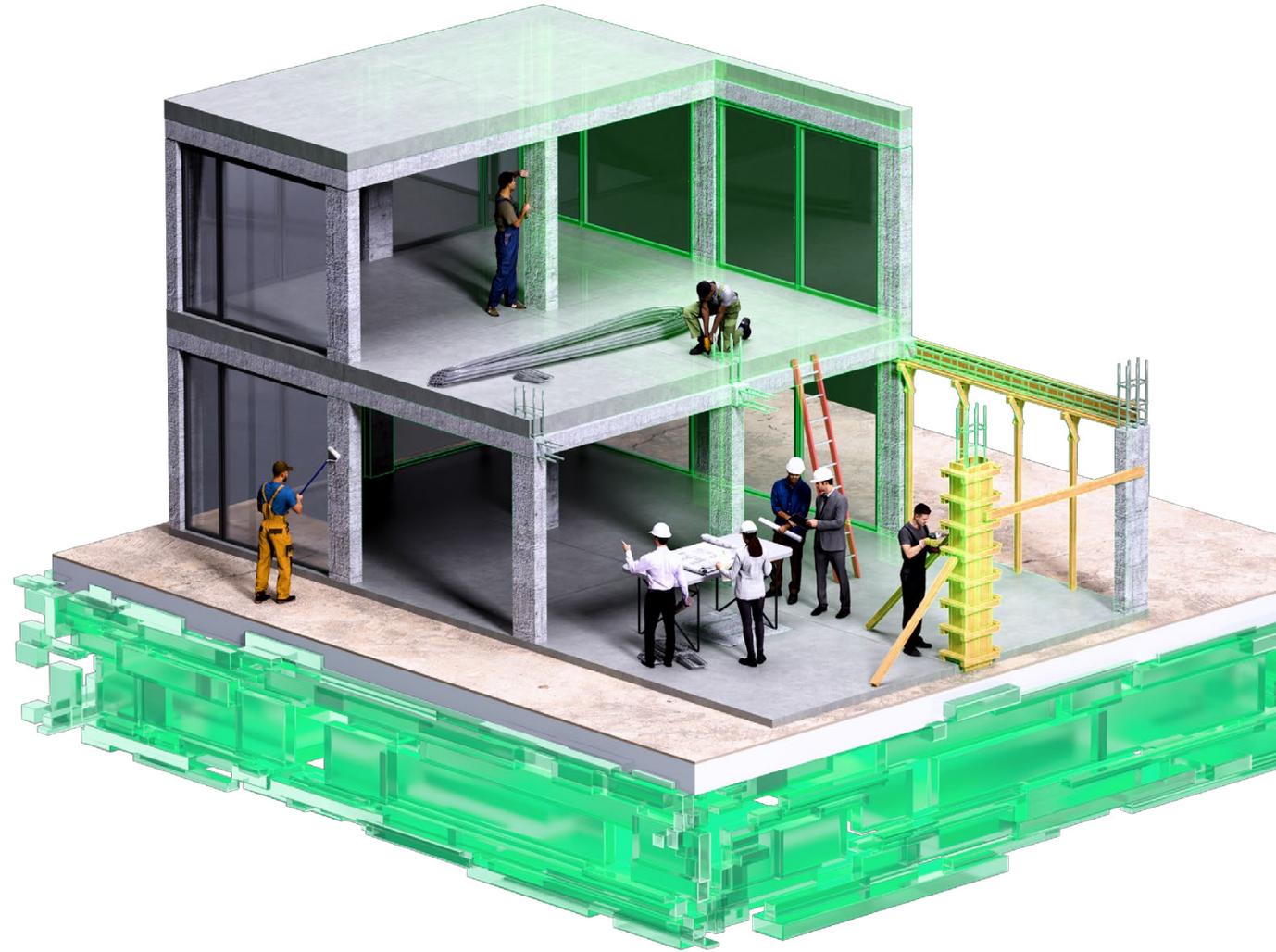
The volatility of recent years has put many organizations in a reactionary position, having to adapt quickly to changing market conditions. Now that leaders are feeling better equipped to handle business challenges, they have started making plans for a more certain future. Along with this new sense of optimism comes exploration of new technologies, processes, and ideas that will uncover new opportunities for growth—and shape the future of design and make.

Appendix

Methodology

Glossary

Thank you

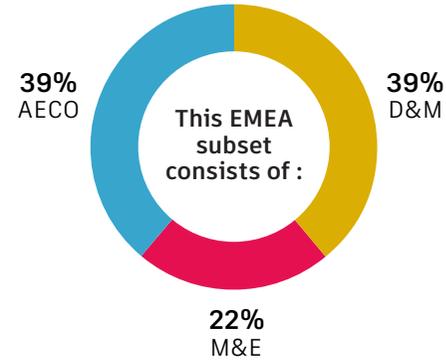


Methodology

For this year's report, Autodesk surveyed and interviewed 5,399 industry leaders, futurists, and experts in the architecture, engineering, construction, and operations; design and manufacturing; and media and entertainment industries from countries around the globe. This report contains key findings from this research, including details at the sector and regional level.

The quantitative data in this EMEA subsample (n= 2389) was collected between July and September 2023, through a 20-minute online survey. Autodesk partnered with Qualtrics for the collection of this data.

* The full questionnaire used in the survey can be found here.



EMEA: 2,389 total

- 25% United Kingdom
- 19% France
- 19% Germany
- 6% Italy
- 6% Middle East
- 6% Netherlands
- 6% Nordics
- 6% Spain
- 6% Turkey

78%

of EMEA survey participants are decision-makers in their companies

11 years

is the average experience EMEA respondents have in their industry

Glossary

Company size:

- **Small:** 1–19 employees
- **Medium:** 20–4,999 employees
- **Large:** 5,000+ employees

Digital maturity:

Respondents were asked how far their companies were in their transformation journeys. Organizations that respondents said are in the “early stage” or “right in the middle” of their digital transformation journeys are considered less digitally mature companies. Those that respondents identified as “approaching the goal” or having “achieved the goal” of digital transformation are considered more digitally mature companies.

Industry:

AECO: Architecture, engineering, construction, and operations

- Architecture services
- Building owners (i.e., developers, real estate companies, governments)
- Civil infrastructure owners (e.g., transportation infrastructure, water infrastructure)
- Construction services
- Engineering service providers
- Mining, oil, and gas
- Utilities and telecom

D&M: Design and manufacturing

- Aerospace and defense equipment
- Automotive and other transportation (including supply chain)
- Building products and fabrication
- Consumer products
- Industrial machinery
- Life sciences manufacturing
- Process manufacturing

M&E: Media and entertainment

- Advertising, publishing, and graphic design
- Film and TV
- Games

Leaders and Experts:

- **Leaders:** Seventy percent of survey participants are decision-makers in their companies. In this report, this group is referred to as “leaders.” Job roles for the leaders group include business owner/entrepreneurs, directors, VP-level and C-level.
- **Experts:** The remaining 30% of respondents are referred to as “experts.” This group includes respondents at the non-managerial level and managers.

Performance:

Companies whose leaders and experts rated their organization’s performance on top business metrics as “above average” or “excellent” are considered top performers.

Region:

APAC: Asia-Pacific

- Australia, China, India, Japan, South Korea

EMEA: Europe, the Middle East, and Africa

- France, Germany, Italy, Middle East (Saudi Arabia, United Arab Emirates), Netherlands, Nordics (Denmark, Finland, Norway, Sweden), Spain, Turkey, United Kingdom

AMER: North, Central, and South America

- Brazil, Canada, Mexico, United States

Sustainability:

The survey questions about sustainability, for example in the list of changes companies are making, focus on environmental sustainability, however, this definition was not explicitly stated.

In one-on-one interviews, a descriptive definition was used incorporating the United Nations definition: “Meeting the needs of the present without compromising the ability of future generations to meet their own needs.” Respondents were told this includes efforts related to the environment (mitigating the effect on climate change), the community (social well-being, improving the life of populations), and corporate governance.

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Contact Autodesk at state.of.design.and.make@autodesk.com about this research report or to sign up to participate in future research programs.



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