To Andrew Anagnost, President and Chief Executive Officer,
Autodesk

Subject: An open letter that reflects customer perspectives on Autodesk in
2020.

**Industry
Context**

The RIBA (Royal Institute of British Architects) Chartered Practice Benchmarking Report highlights the increasing cost of ownership of design-based software as part of the overall growth in costs that the design industry is facing. Even before the Covid-19 pandemic costs were under significant scrutiny and the value added by software vendors is now being questioned as never before.

Diagram 1 - Copyright
RIBA

It is in this context that a number of practices, who represent a revenue stream for Autodesk of over $22m over the last 5 years and thousands of users have come together to express their concerns in a survey which was carried out in June 2020. Their concerns relate to the increasing cost of ownership and the operation of Autodesk's Revit software and fundamentally its lack of development.

In the period between 2015 and 2019 most practices who participated in the survey have had at least 5 different licence models in play, moving from individual product licences, to suites, through to collections and now, in 2020 to individual user licences. Overall, those surveyed have seen costs increase up to 70% and beyond to the end of 2019.

Practices would be less worried by these cost increases if they were mirrored by productivity improvements and a progressive software development program.

Where once Autodesk Revit was the industry enabler to smarter working, it increasingly finds

itself a constraint and bottleneck. Practices find that they are paying more but using Revit less because of its constraints.

Computing
Context

Every day digital design leaders around the world wrestle with software which at its core is twenty years old and incapable of the potential of multi core computing and graphics power designed to process within today's real and virtual workstations. Project productivity in architectural and engineering practices is hit daily because of the lack of scalability and product performance, which then requires sophisticated and practice specific 'work arounds'.
(Question 2). Most practices think that the platform is not meeting current industry requirements.

(Question 3) Autodesk has tabled a variety of initiatives for the next generation of tool(s) to replace Revit but failed to prioritise investment and failed to communicate the roadmap for the delivery of a viable platform to users.

(Question 8) Cost increases on existing software portfolios continue but little value is added to create improved productivity in the core product for design practices in the industry.

Project design outcomes thrive on ever-increasing collaboration between different design disciplines requiring many forms of data interoperability between software platforms as well as compliance to international data standards.

Greater collaboration on interoperability between software platforms and providers could lead to a larger market for all, given the industry is on the cusp of a 'design for manufacturing' revolution. (see McKinsey & Company "The next normal in construction - How disruption is reshaping the world's largest ecosystem").

Designers are in a continuous mode of innovation and improvement as they recycle and evolve data between an ever-expanding portfolio of applications. It is essential to effect better interoperability between Autodesk products as well as with the rest of the industry.

Organisational
Context

Microsoft's reinvigoration under Satya Nadella and his focus on a growth mindset and cultural change is exemplified by this quotation:

"First we needed to obsess about our customers. At the core of our business must be the curiosity and desire to meet a customers unarticulated and

unmet needs with great technology. There is no way to do that unless
we absorb with deeper insight and empathy what they need."

(Satya Nadella - Hit Refresh - The quest to rediscover Microsoft's soul and imagine a better future for everyone. page 101).

This approach would be hugely appreciated by the design community.

However, there does appear to be a lack of trust and empathy from practices regarding the use of Autodesk's cloud services.

(Question 9). Cloud services must be an area of potential future expansion for design businesses as well as for Autodesk as a provider. However, trust, empathy and respect need to be at the core of any such future business relationship.

The protection of intellectual property will be at the centre of the debate for cloud based common data environments. Users want to know what any data that resides in the Autodesk cloud is going to
be used for beyond individual project collaboration. Further the robustness and performance of the Autodesk cloud platform remain a cause for concern.

It is important to note that not all practices felt comfortable adding their name to the list of signatories to this letter for the fear of commercial reprisals but have added their revenues and user count as support for this initiative. Fear, real or perceived in what should be a positive relationship with a key software provider illustrates that there are issues that need to be addressed in Autodesk's powerful relationship with the industry and the industry's relationship with Autodesk's sales structure and processes. (Question 5)

It should be noted that most organisations record a positive relationship with the technical and product support teams in Autodesk.

The
Future

The practices involved in this initiative seek from Autodesk a transparent action plan that is customer centric, non-adversarial, innovative, progressive, and deliverable that includes:

• A vision, roadmap and investment strategy that targets adding value and performance for design based organisations that prioritises the replacement of Revit from the ground up to reflect the functionality needed for a 21st century digital industry.
• A commitment to continuously improving application, and industry

interoperability (including IFC) as well as expanding geometry support and alignment to international data standards.

• Engagement to build a cultural partnership with all customers based on trust, empathy and respect.

• A proposal for cost stability.

• Research and development commitment that is, focused on the needs of the global design community.

We would welcome your response.

From

A community of national and international design practices including:

AHMM Allies and Morrison Aukett Swanke BVN Architectural Services Corstorphine + Wright Fletcher Priest Architects Glenn Howells Architects Grimshaw PRP Rogers, Stirk, Harbour + Partners Scott Brownrigg Sheppard Robson Simpson Haugh Stephen George + Partners TTSP Wilkinson Eyre Architects Zaha Hadid Architects

If you feel you would like to add your practice to this letter and be included in the response from Autodesk. Please Contact - enquiries@godwinconsulting.net July 2020

Diagram 2 - Questionnaire feedback

Questions - Your Practice Perspective

Question 1 The Revit platform has seen major development investment in the last 5 years and warrants the substantial increase per head in licence costs and subscriptions. Question 2 The Revit Platform is written to fully utilise the facilities available in today's real and virtual PC workstations and laptops such as multi-core processors and powerful GPU's. Question 3 Despite being 20-year-old Revit meets the industry needs now and for the foreseeable future. Current development initiatives are well communicated and are progressing successfully and are well resourced to meet future industry needs and should be realised in the near future. Question 4 Autodesk's proactive support of International ISO standards and industry interoperability standards such as IFC is competitive and innovative and opens access to projects by complimentary technologies. Question 5 The consistent sales model that Autodesk continues to deploy is in the spirit of client and supplier partnership, consistently providing added value and includes the ability to effectively administer and visualise all forms of product licencing, installation, upgrades, user reallocation,

uninstallation and enterprise deployments. Question 6 Autodesk's software collections are streamlined, fit for purpose and successfully interoperate across platforms adding sufficient value to justify today's costs. Question 7 The Revit platform natively supports all the required forms of geometry for computational design and the complex design forms required for manufacture and construction. Question 8 Autodesk has a clear vision and roadmap for the future of its digital design platform built upon a culture of partnership with its customer base. Question 9 Autodesk is a trusted partner that has empathy with our business dynamics and the need for the security of our intellectual property we have no issues in utilising Autodesk cloud tools for internal and external collaboration.