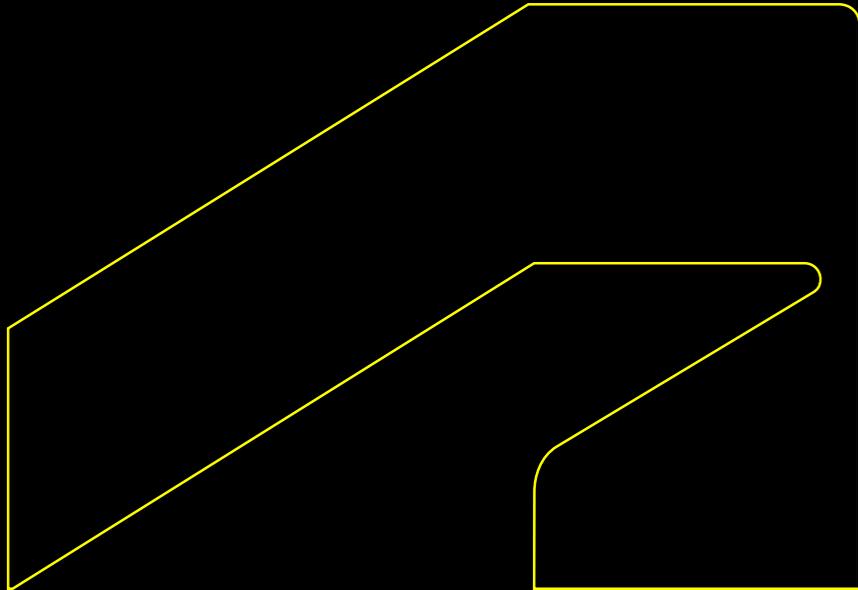


State of Design & Make

AUTODESK

EMEA REGION REPORT



2024
2025
2026
2027

Contents

03	About the report	18	Insight 3 AI solidifies its place as the top sustainability enabler	44	Insight 7 The search for talent intensifies, with a focus on AI skills
04	Introduction	23	Insight 4 The AI hype cycle meets reality	49	Insight 8 Investments remain strong but reflect uncertainty
06	Insight 1 Digital transformation efforts have an overwhelmingly positive impact	32	Insight 5 Cost control, tech, and sustainability are top concerns for leaders in EMEA	54	Conclusion
11	Insight 2 Sustainability transitions from pressure to profitability	39	Insight 6 Leaders are cautious in the near term	55	Methodology Glossary Thank you

About the EMEA report

The *State of Design & Make* report is a global, annual, longitudinal 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 for the future.

For the *2025 State of Design & Make EMEA region* report, Autodesk surveyed and interviewed 2,471 industry leaders, futurists, and experts across Design and Make industries: architecture, engineering, construction, and operations (AECO); design and manufacturing (D&M); and media and entertainment (M&E) located in the Asia-Pacific (APAC) region including Australia, China, India, Japan, Singapore, South Korea. This is the third longitudinal year of this report series with data comparisons from the previous two reports.

What is Design and Make?

A convergence of technologies and methodologies in industries that produce digital and built assets over the past 40-plus years has resulted in a distinct category of work: Design and Make. Design and Make shapes the surrounding world, translating complex ideas into powerful experiences, whether it's transforming a sketch into a school, turning a concept into a car, or making a myth into a movie.

Globally, Design and Make employs, conservatively, 295.7 million people.¹

Before digitalization, much of this work took place in discrete, siloed phases, handed off from specialist to specialist. With the advent of digital workspaces and modeling tools, these phases have converged into a centralized way of working informed by data-driven insights. Today, teams collaborating on Design and Make projects see their work as part of a larger, interconnected process. Digital tools and standards make it easier to map interdependencies, refine processes, and democratize solutions.

For the professionals immersed in it every day, Design and Make is more than a way of working—it's a philosophy and a mindset. It represents a deep belief that every challenge and complexity can be overcome with the right tools and the right skill set. Designers and makers are optimists united by a shared drive to make a better world for all.

¹ [World Economic Forum, 2023](#)

Introduction

Leaders in the EMEA region report that they are confronting daunting headwinds, from increased geopolitical uncertainty and inflation to talent gaps and challenges implementing emerging technologies like artificial intelligence (AI). But for the third year, digital transformation has proven to help M&E organizations identify opportunity amid disruption, providing benefits nearly across the board.

2025 State of Design & Make key findings for EMEA

Leaders were clear on the challenges they are facing.

Cost control and technological advancements are top of mind for Design and Make organizations amid continued inflation, increasing supply-chain fragility, and ongoing implementation challenges. Talent remains a perennial problem, with many organizations experiencing a skills gap and the majority saying lack of skilled talent is hindering growth.

Optimism about AI is down, and concern about its destabilizing effects is up among leaders in EMEA as organizations struggle with finding practical use cases for the new technology. And, finally, global uncertainty is depleting organizational confidence and increasing feelings of unpreparedness.

Despite this uncertainty, business leaders in EMEA are still feeling bullish in some areas as they identify opportunity amid disruption

- Although overall investments are down year-over-year, 64% of leaders say they will increase overall future investments.
- Sustainability is experiencing a surge of optimism, with 96% of leaders saying their organizations are taking steps to be more sustainable. Sustainability also continues to be a key differentiator in talent acquisition.
- This year, AI solidified its place as the top sustainability enabler for Design and Make organizations in EMEA, with applications from natural-disaster mitigation to project lifecycle management.

One standout finding this year is that most EMEA leaders surveyed say digital transformation efforts led to improvements at their organizations. The majority of organizations benefiting from digital transformation are seeing more than 50% improvements in categories such as customer satisfaction, innovation, and productivity. Digitally mature companies tend to invest more heavily in technology, and those investments are now paying outsize dividends during the current period of caution.

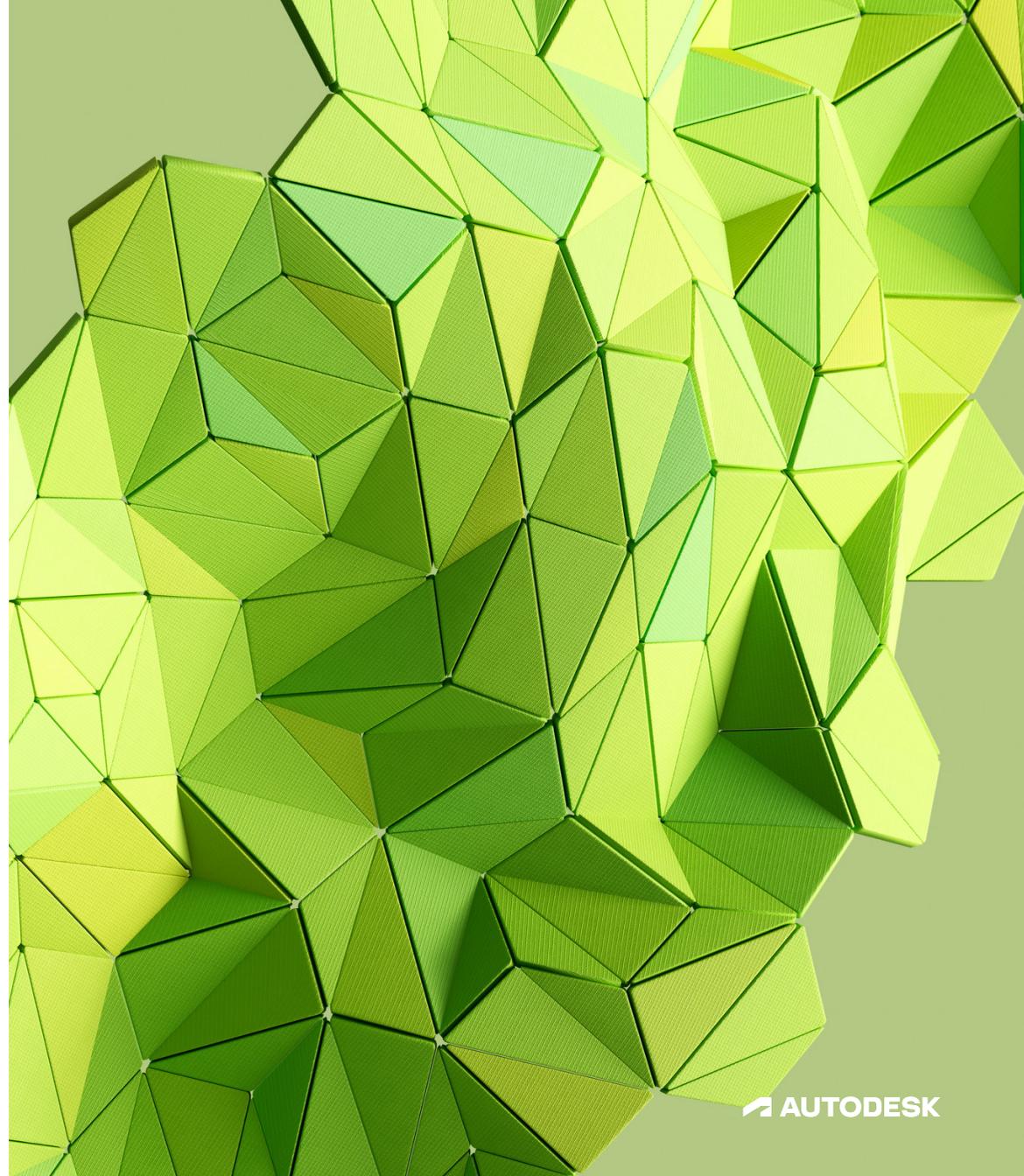
The digital maturity difference

The digital maturity difference
In this report, “digitally mature” companies are defined as those that are approaching or have achieved the goal of their digital transformation journey. “Less digitally mature” companies are defined as those that are in the early stages or right in the middle of their digital transformation journey.

- Digitally mature organizations in EMEA are 33% more likely to diversify their supply chains, and leaders at these organizations feel more prepared to handle unforeseen changes compared to less digitally mature companies, giving them an advantage when it comes to resilience.
- These organizations are also more likely to leverage internal data to gain a competitive edge, more quickly develop products and services, and complete projects faster than other companies.

- Digital maturity eases talent concerns, with an 8-point improvement in talent acquisition and retention from their technological advancement over less digitally mature organizations.
- Organizations that are digitally mature are more likely to enter new markets and increase investments into acquisitions, allowing them to expand while others are contracting.

There’s no question that leaders in EMEA are confronting a challenging geopolitical and macroeconomic environment. But given the findings of the *2025 State of Design & Make* survey, a resilience agenda centered on digital transformation can provide strong protection against uncertainty.



Digital transformation
efforts have an
overwhelmingly
positive impact

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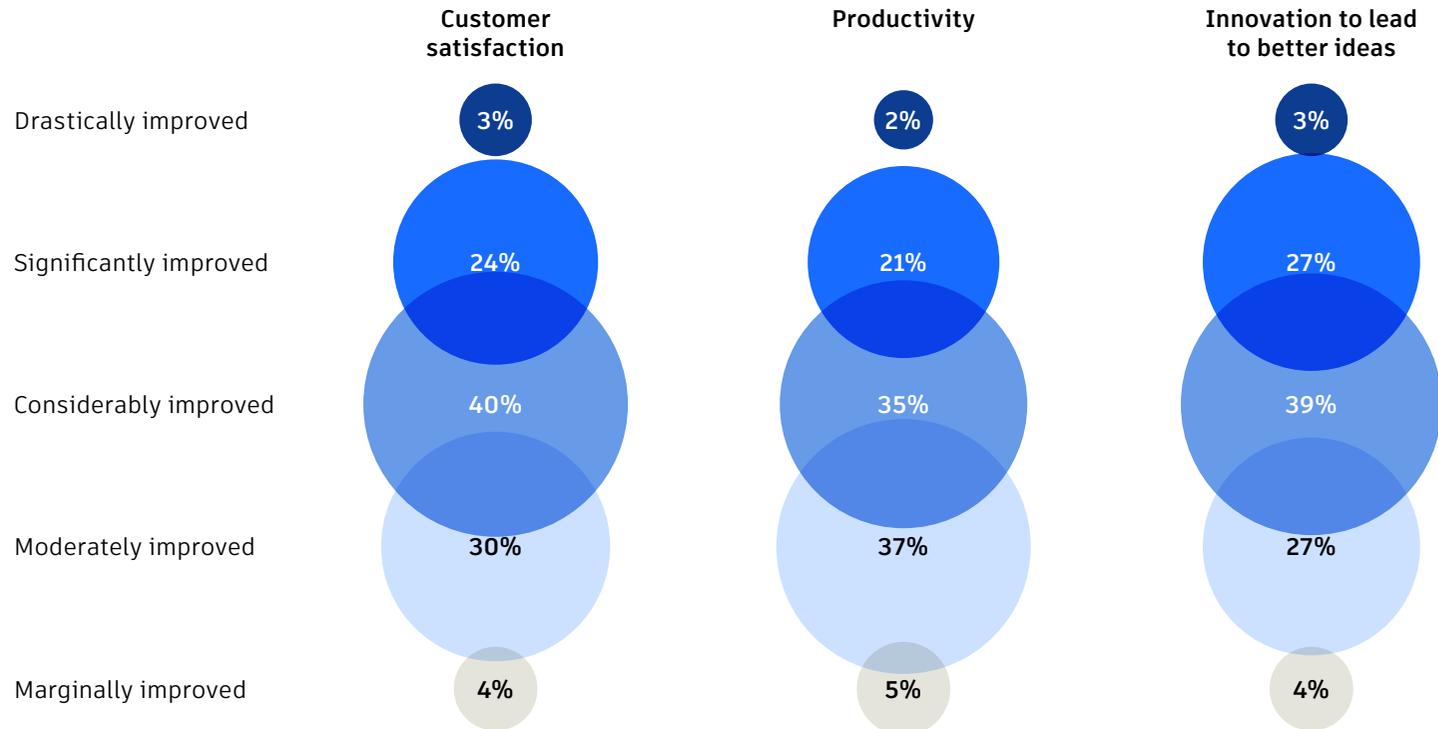
INSIGHT 1: EMEA

Implementation of new technology is a perennial challenge for leaders in Design and Make industries, but those who tackle the complexities of digital transformation are reaping the rewards of their efforts. The majority of leaders in EMEA surveyed for the *2025 State of Design & Make* report have already realized a 50%+ return on their digital transformation efforts in the form of increases in innovation, productivity, and other categories.

50%+
return on investment from
digital transformation

Digital transformation efforts have an overwhelmingly positive impact

Majority of organizations realize more than 50% ROI from digital transformation



EMEA respondents. Survey question: Has your company or organization experienced any of the following benefits of digital transformation? Select all that apply. Followed by survey question: You selected [benefit] as a benefit of digital transformation. How much has digital transformation improved [benefit]? Response scale: "Marginally," "Moderately, by 25%," "Considerably, by 50%," "Significantly, by 75%," and "Drastically, by 100%."

INSIGHT 1: EMEA

Along with improvements in customer satisfaction, productivity, and innovation, leaders benefitting from digital transformation report it is also having positive effects on company reputation (71%), expansion of products and services (65%), and improved data exchange (65%).

Digital maturity benefits the entire organization

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. “Less digitally mature” companies are defined as those that are in the early stages or right in the middle of their digital transformation journey.

In EMEA, respondents from digitally mature companies report they are ...

+25%

... more likely to have experienced “above average” or “exceptional” **performance**

+25%

... more likely to “agree” they **are prepared** for the future

+31%

... more likely to have “increased” or “strongly increased” **investment** in the past 3 years

+23%

... more likely to have kept up “very well” with **change in the industry**

With results like these, less digitally mature organizations thinking about reducing their digital transformation investments in the next few years should reconsider. The benefits of digitization are clear, and the longer organizations take to get up to speed, the greater the drag on their performance could be. While sometimes challenging, the long-term benefits of digital transformation far outweigh short-term struggles.

Cost, time, and talent are the biggest barriers to digital transformation



Survey question: What are the barriers to digital transformation in your company or organization? Select all that apply.

INSIGHT 1: EMEA

“Digital transformation is a journey, not a destination. What we have invested in the last three years will be different from what I’m investing in the next three years.”

DR. MAX CLARK

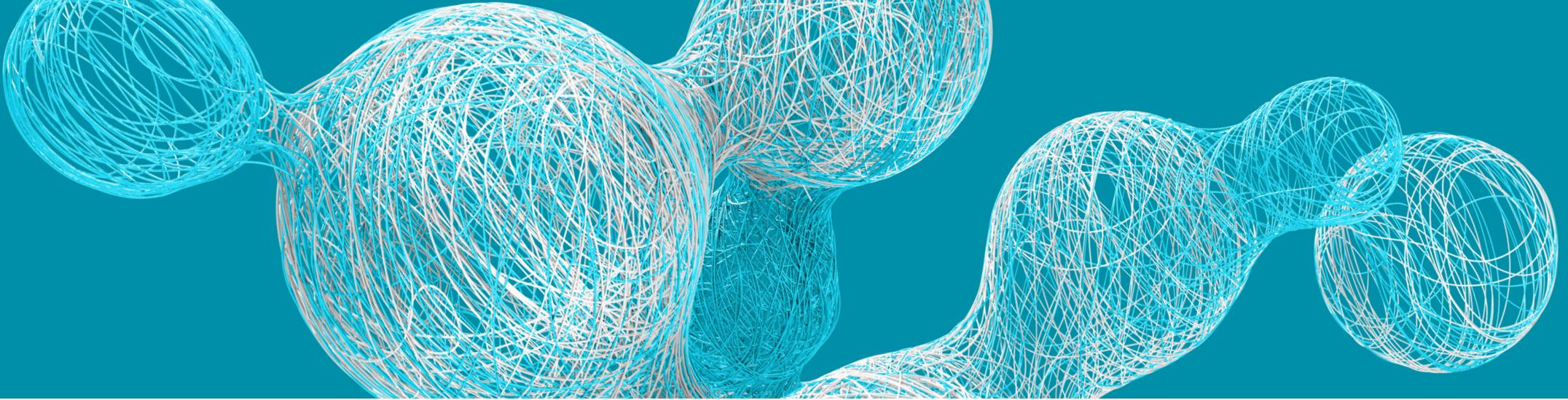
Senior Vice President, EMEA CTO & Sector Manager, Parsons,
a global engineering firm headquartered in the United States

The cost of digital transformation is a growing challenge for many organizations, with 46% of leaders saying it’s their main barrier, up from 36% last year and reflecting a global increase in concern about cost control. But given the outsize returns organizations are seeing from their digital transformation investments, cost-cutting measures could have equally outsize negative effects if they impact technology initiatives. Time and talent follow as most-cited obstacles as organizations struggle to meet implementation goals while also trying to do more with fewer resources.

The more digitally mature an organization, the less concerned they are with cost and talent and the more concerned they are with the actual technology. In EMEA, digitally mature companies less often cite cost (44% compared to 48%), and more often cite the limited capabilities of the tools (25% compared to 22%) as a barrier. These organizations also have an advantage when it comes to talent, with 71% of leaders saying digital transformation has improved talent acquisition and retention compared to 54% at less digitally mature companies.

Sustainability transitions from pressure to profitability

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INSIGHT 2: EMEA

Increasing awareness of the business value of sustainability has many leaders changing their perspective, seeing sustainability initiatives less as an obligation and more as an opportunity for greater performance. The number of executives globally who understand the business case for sustainability tripled between 2022 and 2023,² and the majority of 2025 *State of Design & Make* survey

respondents say that sustainability is crucial for future business growth in the next three years.

This signals a shift in sentiment and priorities, driven by both the short- and long-term opportunities that sustainability can provide. In EMEA, 72% of business leaders believe that sustainability measures can generate in excess of 5% of their annual revenue.

While organizations across EMEA are still influenced by stakeholders to become more sustainable, that influence appears to be waning. For instance, this year 71% of leaders say their sustainability initiatives were influenced by customers, compared to 84% in 2024.

“The greatest challenge we face is the multifaceted impact of climate change - bringing water scarcity during certain seasons and driving pollution events through increasingly intense and unpredictable rainfall at other times.”

NITESH ALAGH

Business Lead – Digital Engineering, Sustainability & Emerging Tech, Severn Trent Water, a water and wastewater utility company headquartered in the UK

² [World Economic Forum, 2023](#)

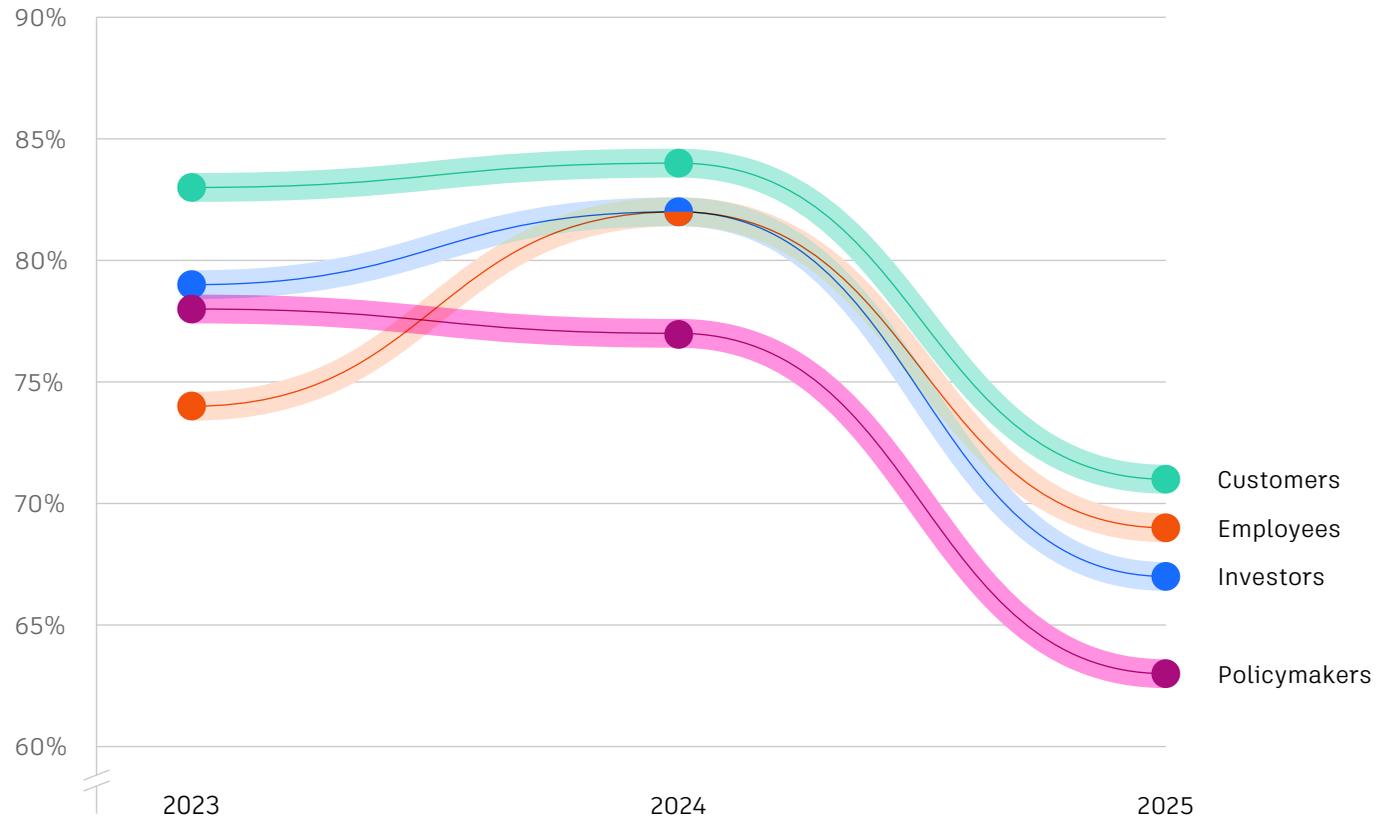
INSIGHT 2: EMEA

In EMEA, the decline in stakeholder influence is universal across all groups, including customers, employees, investors, and policymakers. New to the survey this year as possible influencers are partners (69%) and suppliers (63%).

While the influence of stakeholder groups is down, sustainability efforts remain steady, with 96% of leaders in EMEA reporting their organizations are making changes to be more sustainable. This suggests that organizations are starting to take the reins on sustainability initiatives by incorporating them into long-term strategy rather than allowing external influences to guide decisions.

Stakeholder influence is in decline

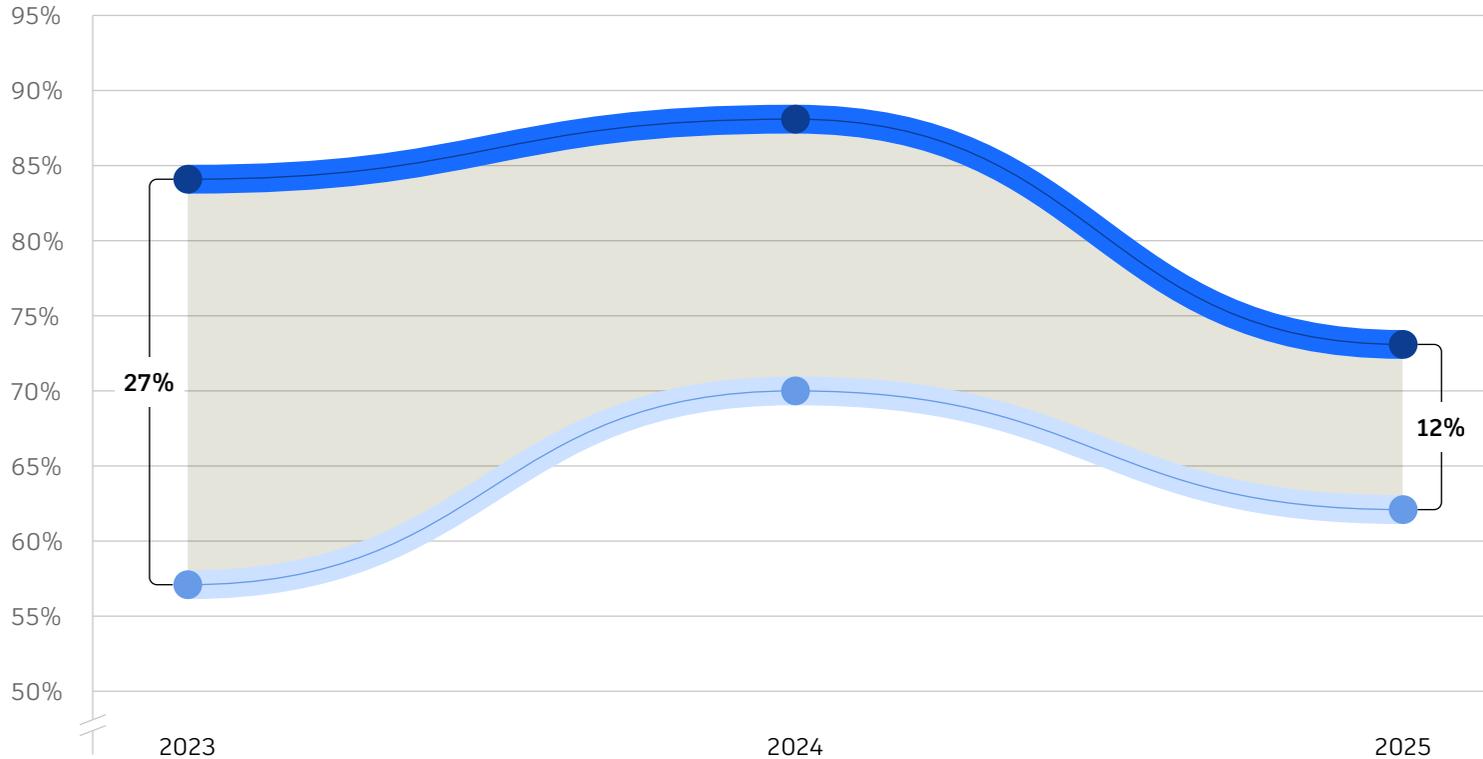
Leaders have other reasons for sustainability initiatives



EMEA respondents. Survey question: How influential are the following groups in motivating your company or organization to create and meet sustainability goals? 5-point scale. Top two = influential.

Closing the gap between long-term and short-term strategy

- EMEA: ● Improving sustainability practices is a good **long-term** business decision
● Improving sustainability practices is a good **short-term** business decision



Percentage of respondents who agree to 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. Gap = difference between long-term and short-term for each year.

INSIGHT 2: EMEA

At the heart of this perspective shift is the growing understanding that, while historically seen as a long-term revenue play, improving sustainability is also a good near-term strategy. This year in EMEA, the gap between leaders who see sustainability as a short-term versus long-term strategy has narrowed to just 12%, signaling that sustainability is seen as good for business overall.

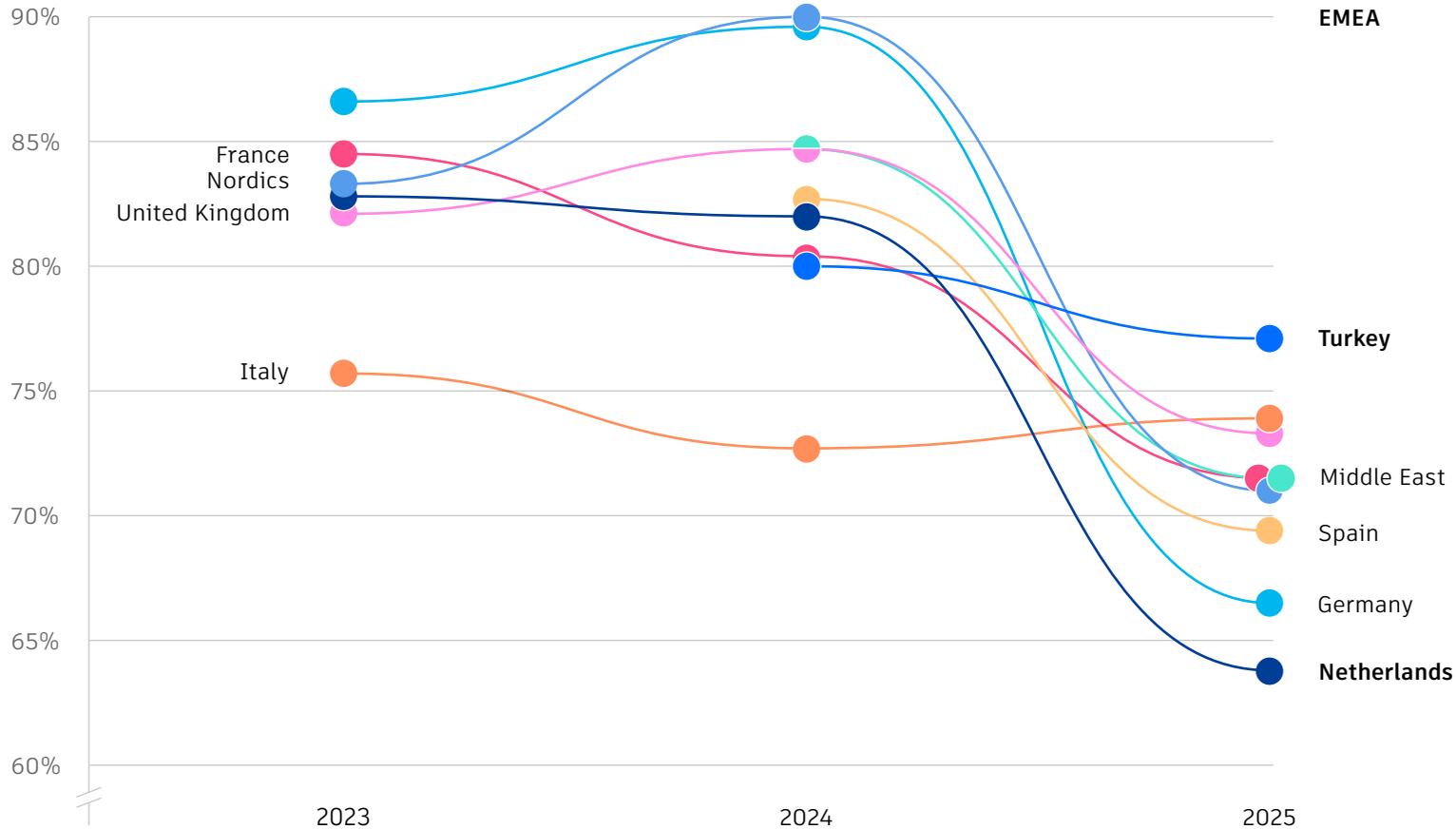
Digitally mature companies are at an advantage when it comes to reaping sustainability benefits. In EMEA, 81% of digitally mature organizations see long-term benefits from sustainability and 71% see short-term benefits, compared to just 66% and 53% respectively at less digitally mature organizations.

Sustainability efforts are also easing talent struggles at digitally

mature companies, with 73% of leaders reporting their sustainability efforts help attract and retain talent, compared to 53% at less digitally mature companies. Industry interviews reinforce these findings, with leaders saying younger skilled workers want to join organizations that are both technologically advanced and committed to building a better future.

Leaders at digitally mature companies appear to be seeing the transformational potential of sustainability across their organizations—and are likely increasing their budgets to match. In EMEA, 73% of leaders say they will increase their investments in environmental sustainability, compared to just 54% at less digitally mature companies.

Turkey most influenced by customers, Netherlands the least



Percentage of respondents who agree that customers are influential when it comes to their sustainability goals. Survey question: How influential are the following groups in motivating your company or organization to create and meet sustainability goals? 5-point scale. Top two = influential.

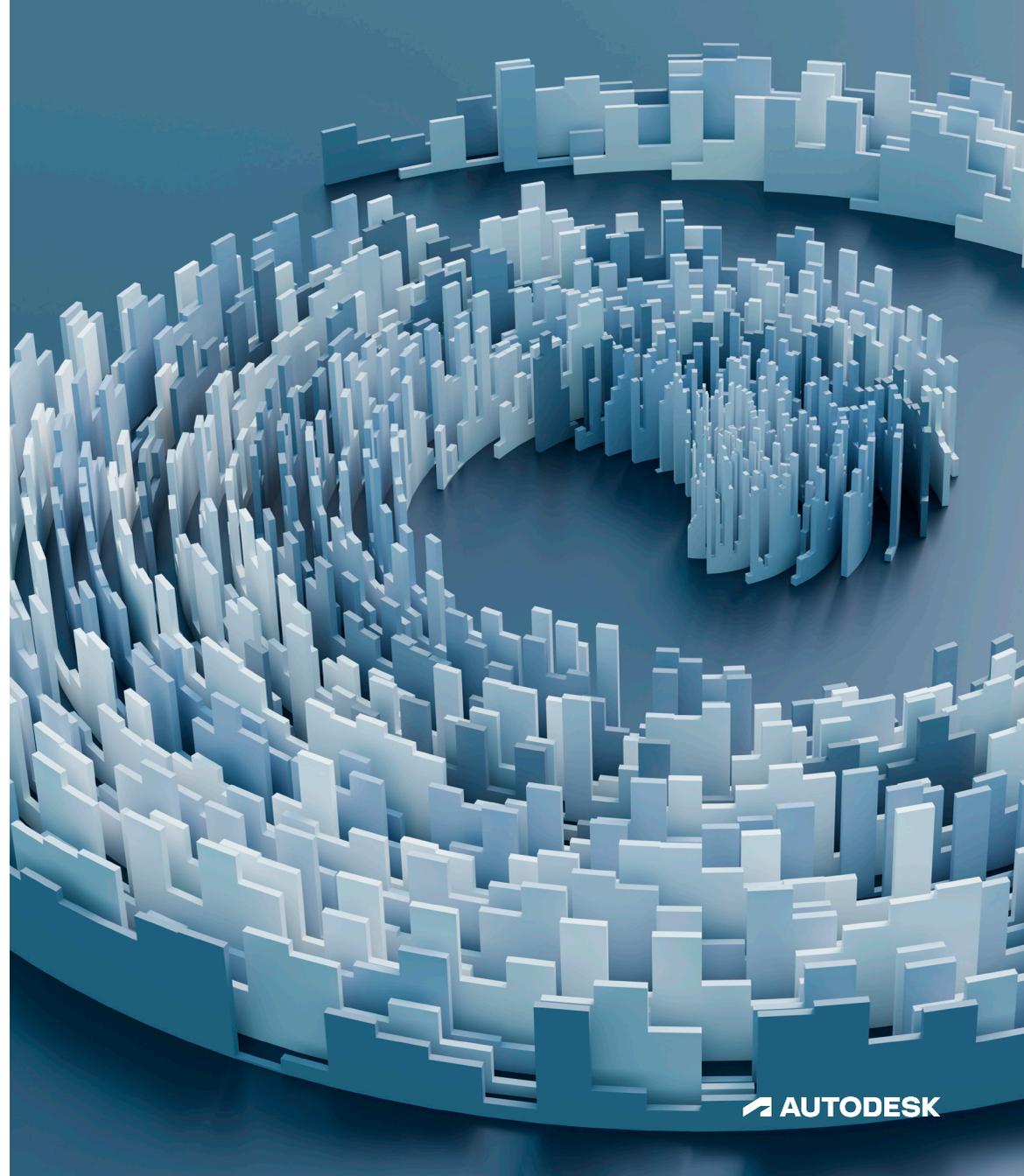
INSIGHT 2: EMEA

Turkey is the EMEA country where the highest percentage of business leaders (77%) say that customers influence sustainability initiatives. Turkey is also one of the EMEA countries with the lowest percentage of respondents saying that their companies are not engaged in any sustainability actions (2%), the other being the Middle East, also at 2%.

Some countries saw significant year-over-year declines in the percentage of business leaders who consider customers influential, including Germany (90% to 67%) and the Nordics (90% to 71%). The drop in customer and other external influences could suggest organizations taking the lead when it comes to sustainability initiatives.

“Sustainability is very important for us, of course, because of the nature of what we do—because we design buildings and infrastructures in transportation and for energy. And these sectors represent, together, close to 70% of carbon emissions worldwide.”

PIERRE-YVES MASSILLE
CTO, Egis Group,
an engineering and consulting
firm headquartered in France



AI solidifies its place as the top sustainability enabler

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INSIGHT 3: EMEA

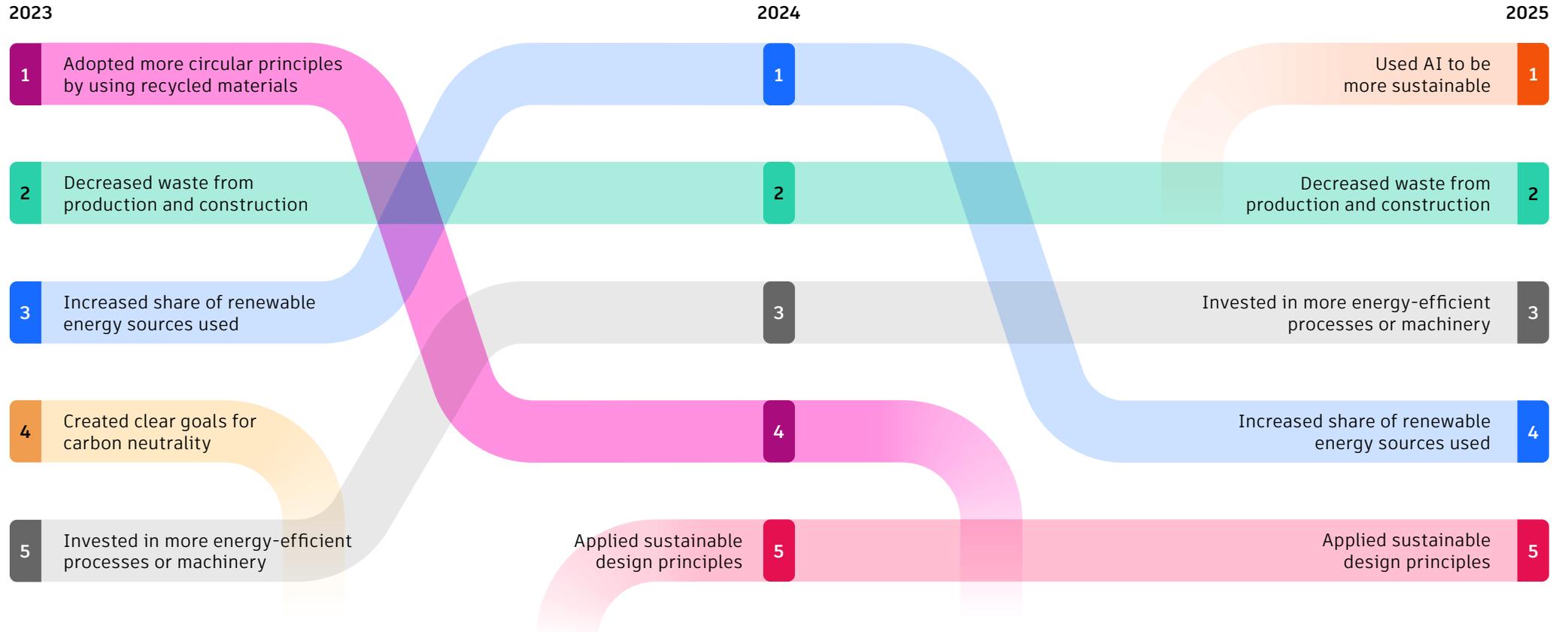
AI is now the top sustainability enabler for Design and Make industries in EMEA with 38% of leaders saying they use AI to be more sustainable, up from 31% last year and 25% in 2023. With nearly all organizations taking steps to be more sustainable, many are turning to AI technology to help enable sustainable outcomes.

38%

of businesses in APAC have used AI to be more sustainable

The continuing integration of AI and sustainability

EMEA: AI is the top sustainability enabler for the first time



Survey question: What changes has your company or organization already made to be more sustainable? Select all that apply. 12 response options.

“AI could analyze a model’s carbon footprint. It’s a huge workload to do this, we have six people who reviewed 500 projects last years AI could help in this case, and hopefully in other ways as well.”

CHRISTIAN AHLERS

CAD Systems Administrator, Lindner Group, an interior construction specialist headquartered in Germany

The integration of AI into sustainability efforts is having an impact across Design and Make industries in APAC. Among other things, AI helps to mitigate the impact of natural disasters by visualizing flood impacts; reduce carbon footprint by optimizing building energy use and preventing material waste; and assess product lifecycles, providing a detailed view of environmental impact from materials sourcing through disposal.

Not surprisingly, digitally mature companies in EMEA, report using the technology for sustainability

more than less digitally mature organizations (42% and 34%, respectively). At data-effective organizations—organizations at which leaders said they are “very effective” at leveraging data—45% of leaders using AI to enable sustainability, compared to 37% of other organizations. These numbers highlight an AI implementation gap—one that may widen as technology advances, providing a competitive advantage for digitally mature organizations.

Ironically, the AI technology enabling more sustainable outcomes is also increasingly taxing on the

environment. Data centers require a large amount of water and energy to run and cool and produce electronic waste that is difficult to dispose of. Design and Make organizations are exploring solutions to this problem to offset the impact of data centers, including carbon removal technology or carbon offset programs.

INSIGHT 3: EMEA

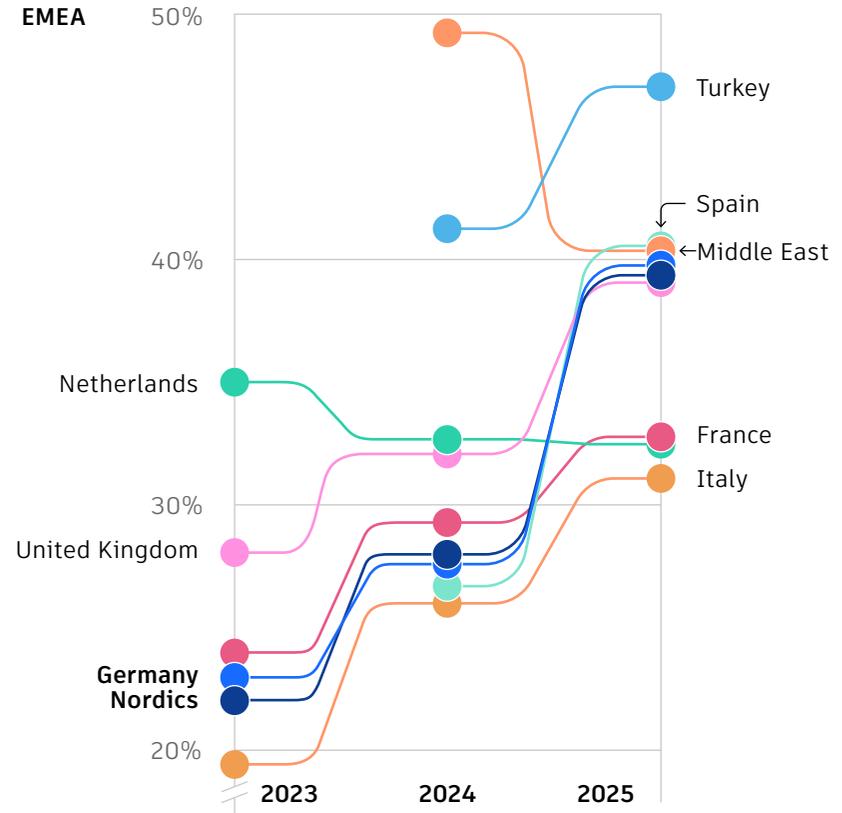
Today, Turkey has the highest percentage (47%) of business leaders in EMEA who say they are using AI to become more sustainable, unseating the Middle East, where the percentage dropped to 40% from 49% in 2024.

Germany and the Nordics saw the largest increases in the region in the percentage of respondents who say their companies are leveraging AI for sustainability, from 28% to 40% in Germany and from 28% to 39% in the Nordics, representing a 43% and 39% year-over-year increase, respectively. Governments in Germany and Turkey, for example, have invested in AI technology for sustainability as part of a larger AI strategy, and those efforts are starting to yield downstream results at the organizational level.

“The Middle East is becoming more and more driven by sustainability. It’s required by the client. It is embedded within our clients’ respective master plans and visions that they have laid out publicly, including the Bahrain, Qatar, Abu Dhabi, and Saudi Visions 2030; Oman Vision 2040; and the Dubai 2040 Urban Master Plan.”

DR. MAX CLARK
Senior Vice President, EMEA
CTO & Sector Manager, Parsons,
a global engineering firm
headquartered in the United States

Germany, Nordics see largest jump in AI adoption for sustainability



Percentage of respondents who selected “Used AI to be more sustainable.” Survey question: What changes has your company or organization already made to be more sustainable? Select all that apply. 12 response options.

The AI hype cycle meets reality

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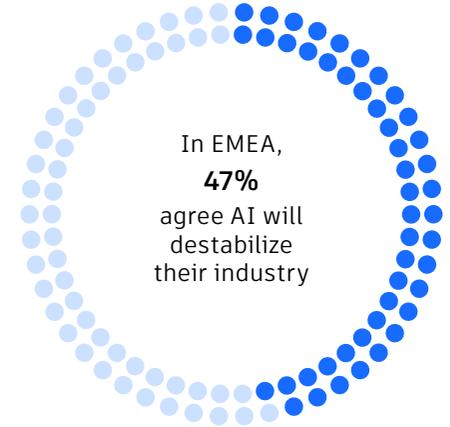
INSIGHT 4: EMEA

Since the introduction of ChatGPT in late 2022, businesses have been racing to tap the potential of AI making it a strategic priority across industries. *2024 State of Design & Make* survey results underscored this enthusiasm, with 82% of leaders in EMEA saying that AI would enhance their industry.

But the reality of AI hasn't yet lived up to the hype, according to leaders in Design and Make industries. Sentiment toward AI and other emerging technologies is down significantly year over year, with

just 69% of business leaders in EMEA saying AI will enhance their industry—representing a 16% drop from 2024. Industry disruption from AI is also a major concern, with nearly half of leaders now agreeing that AI will destabilize their industry.

This drop in sentiment across industries signifies that AI is following the classic tech hype cycle, as leaders face the reality of implementation, an ongoing technical skills shortage, and the limitations of the current technology.



“I am optimistic about AI and its future, however, AI is only as effective as the information it’s given. The information input into AI impacts the quality of what comes out.”

GREGORY ZATKA

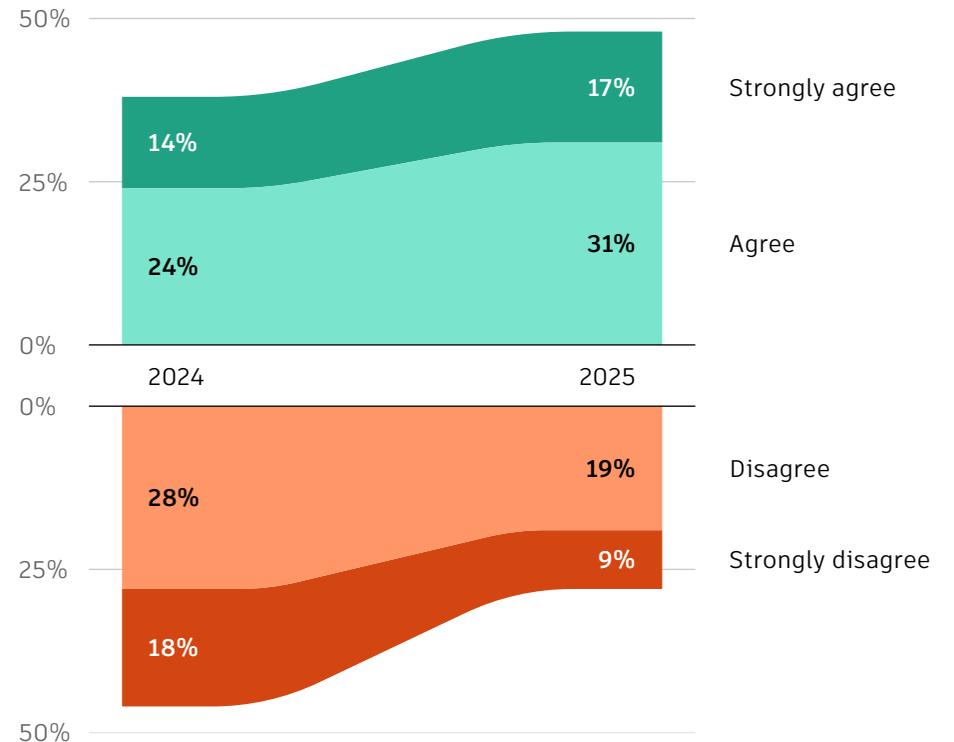
Head of Digital Assets Management, EuroAirport Basel-Mulhouse-Freiburg, a French international airport

Nearly half (48%) of leaders and experts in EMEA agree AI will destabilize their industry, up from 38% in 2024, and representing a 26% year-over-year increase. This indicates leaders are becoming more concerned about AI and emerging technology as its implementation in their industry, and at their organizations, grows.

From the standpoint of digital maturity, there is a stark difference in perceptions of disruption. Digitally mature companies are far more likely to say that AI will destabilize their industry (55%) compared to less digitally mature companies (40%). This makes sense when considering that digitally mature organizations will have more processes, systems, and workers impacted by AI implementation.

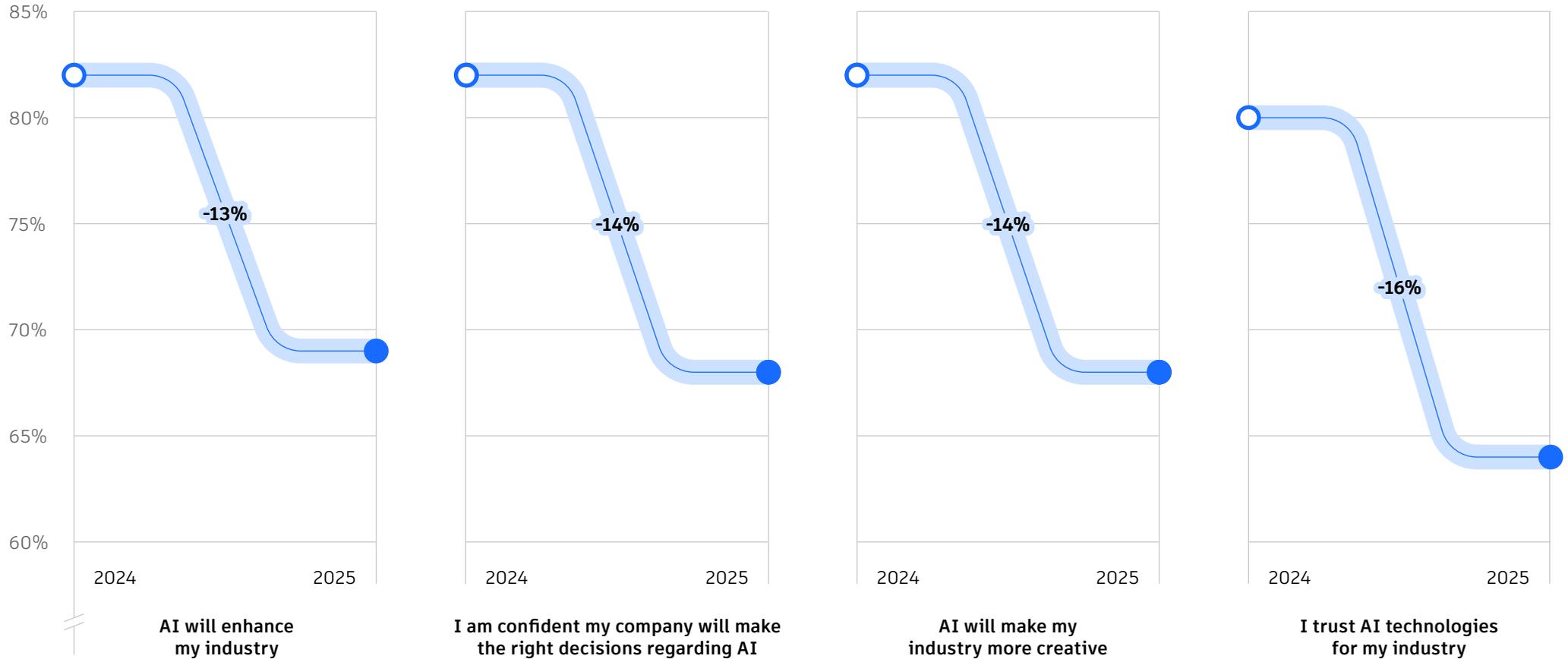
Concern about AI-related industry disruption is up

Nearly half of business leaders agree AI will be destabilizing



EMEA respondents. Survey question: When you think about artificial intelligence (AI) in your industry and company, to what extent do you agree or disagree with the following? 5-point scale. Data for “neither agree or disagree” not shown.

AI sentiment is down across the board



EMEA respondents. Percentage of respondents who agree to statements: 1. AI will enhance my industry. 2. AI will make my industry more creative. 3. I am confident my company will make the right decisions regarding AI. 4. I trust AI technologies for my industry. Survey question: When you think about artificial intelligence (AI) in your industry and company, to what extent do you agree or disagree with the following? 5-point scale. Top two = agree.

INSIGHT 4: EMEA

Concern about disruption is up and overall positivity about AI has dropped significantly from 2024. Notably, trust in AI technology for Design and Make industries in EMEA has decreased 16 points year-over-year, representing a 20% change in sentiment.

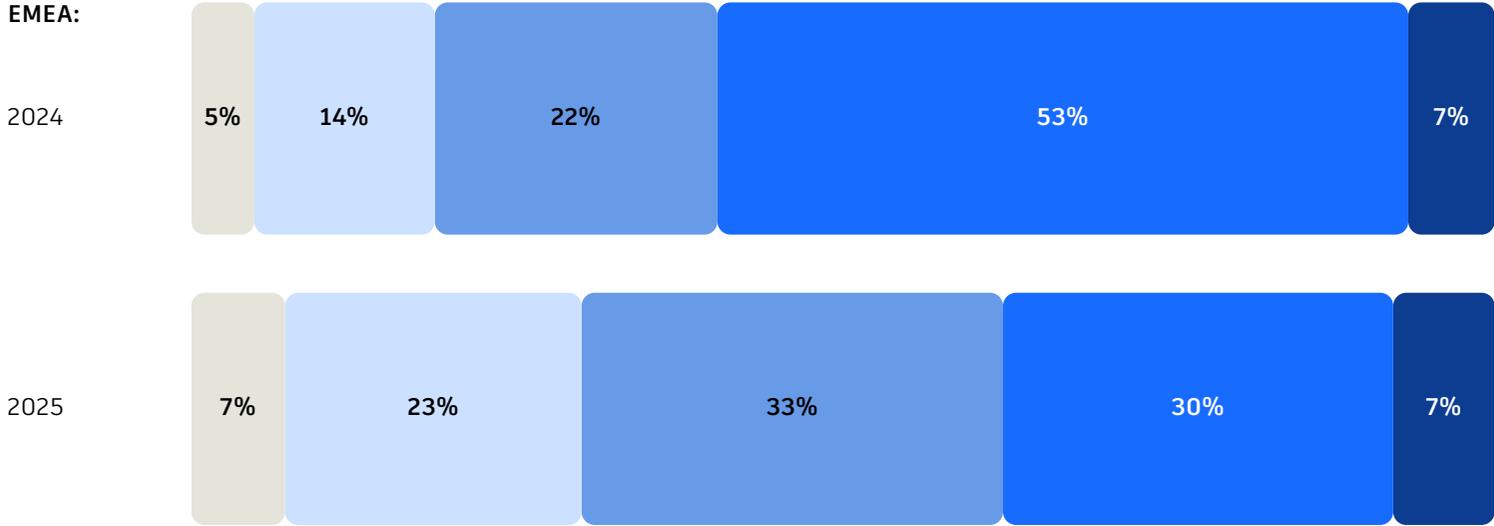
One of the many reasons for this sharp decline is concern about cybersecurity incidents; privacy issues; biased or harmful outcomes; and limited control over how, where, and when their data is used. For example, organizations struggle to manage how to use third-party AI tools without exposing their sensitive data or sensitive customer data. Also challenging is the implementation of AI solutions across the organization, both in terms of time and money. In interviews, leaders said that in some industries or regions, AI regulations are lagging behind the pace of technology, leaving businesses in a difficult position when it comes to implementation, limitations on use, and liability.

“People are quick to jump into AI. But then we don’t know the context or we haven’t validated the data that we have. But from the design, construction, and the operation perspective, AI plays a very critical role. From a productivity perspective, we can use different AI processes to help maybe come up with design suggestions in terms of optimizing maybe airflow, optimizing space. And so there’s that optimization perspective based on the learning of this. Which is why data quality is so important.”

DR. KAREN BLAY, MCP, BSC, PGCERT, MSC, PHD, FHEA, MACM, MCIQB, MIHEEM
Senior Lecturer in Digital Construction and Quantity Surveying,
Loughborough University, a public research university in England

AI journeys adjust to reflect implementation realities

● Not started ● Early stage ● Middle of the effort ● Approaching goal ● Achieved goal



Survey question: Where is your company or organization in incorporating artificial intelligence (AI) technology?
5 point scale. Values do not add up to 100% due to rounding.

INSIGHT 4: EMEA

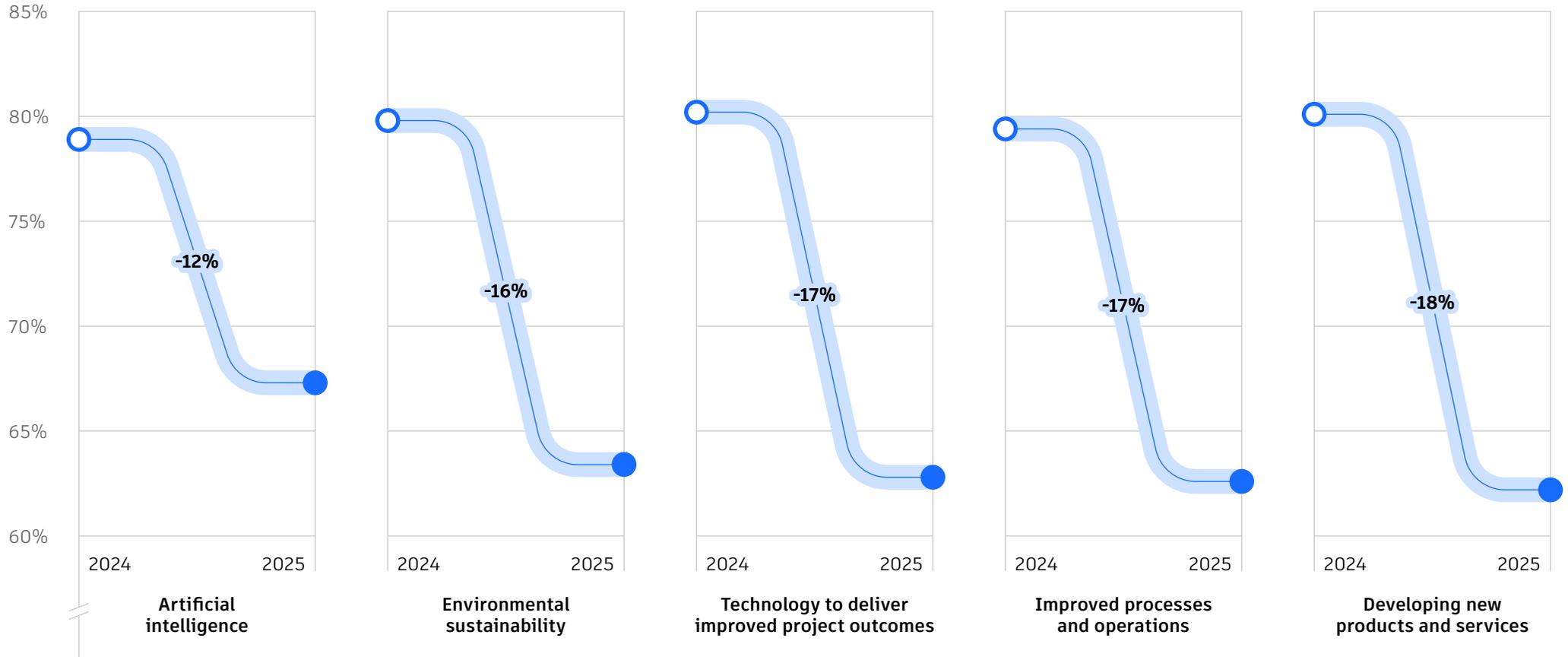
In 2024, leaders in EMEA were confident about progress toward reaching their AI goals, with 60% saying they were approaching or had already achieved their goals. This year, as leaders are faced with the complexities of implementing AI solutions across their organizations, they are rethinking where they are on their AI roadmaps.

Only 37% of leaders in EMEA say they are approaching or have achieved their AI goals, a 23-point decrease, that represents a 38%

decline year-over-year. Leaders are more conservative this year when estimating their progress, with a 56% year-over-year increase in leaders who say they are in the early or middle stages of their AI journey. Along with other survey results, this finding suggests that leaders could be struggling to progress with AI as they encounter a confluence of cost, talent, and time concerns, and that the technology is not quite mature enough to easily implement across organizations as leaders hoped.

Their response is to invest, but there is a stark divide in who is betting big on AI. In EMEA, 76% of leaders at digitally mature organizations say they will increase investment in AI, compared to 59% at less digitally mature companies. These increased investments could lead to outsize benefits for more digitally mature organizations who are already seeing benefits in hiring, productivity, and innovation from digital transformation efforts.

Investments dip overall but remain high in AI



EMEA respondents. Survey question: How do you think your company or organization's investment in the following will shift in the next 3 years? 5-point scale. Top two = increase. Drop = Increase for 2024 minus 2025.

INSIGHT 4: EMEA

Despite implementation challenges and a dip in sentiment, Design and Make leaders in EMEA are still optimistic about AI's potential.

When asked how their organization's investments will shift over the next few years, 67% of respondents say their investments in AI will increase. And while AI and emerging tech investments are down 12 points from last year, this represents a smaller dip than the average 12-point overall decrease in future investments.

“Last year was a really exceptional year in terms of AI. The excitement about the potential that AI could actually deliver has gone down to a more realistic approach, where we're understanding that the journey is long and we're really in the beginning. That puts back that some of the expectations were maybe unrealistic given the current capabilities of AI. But we remain proactive in driving future advancements.”

MOHAMAD KASSIR

Global BIM Manager, Egis Group, an engineering and consulting firm headquartered in France

**Cost control, tech,
and sustainability
are top concerns for
leaders in EMEA**

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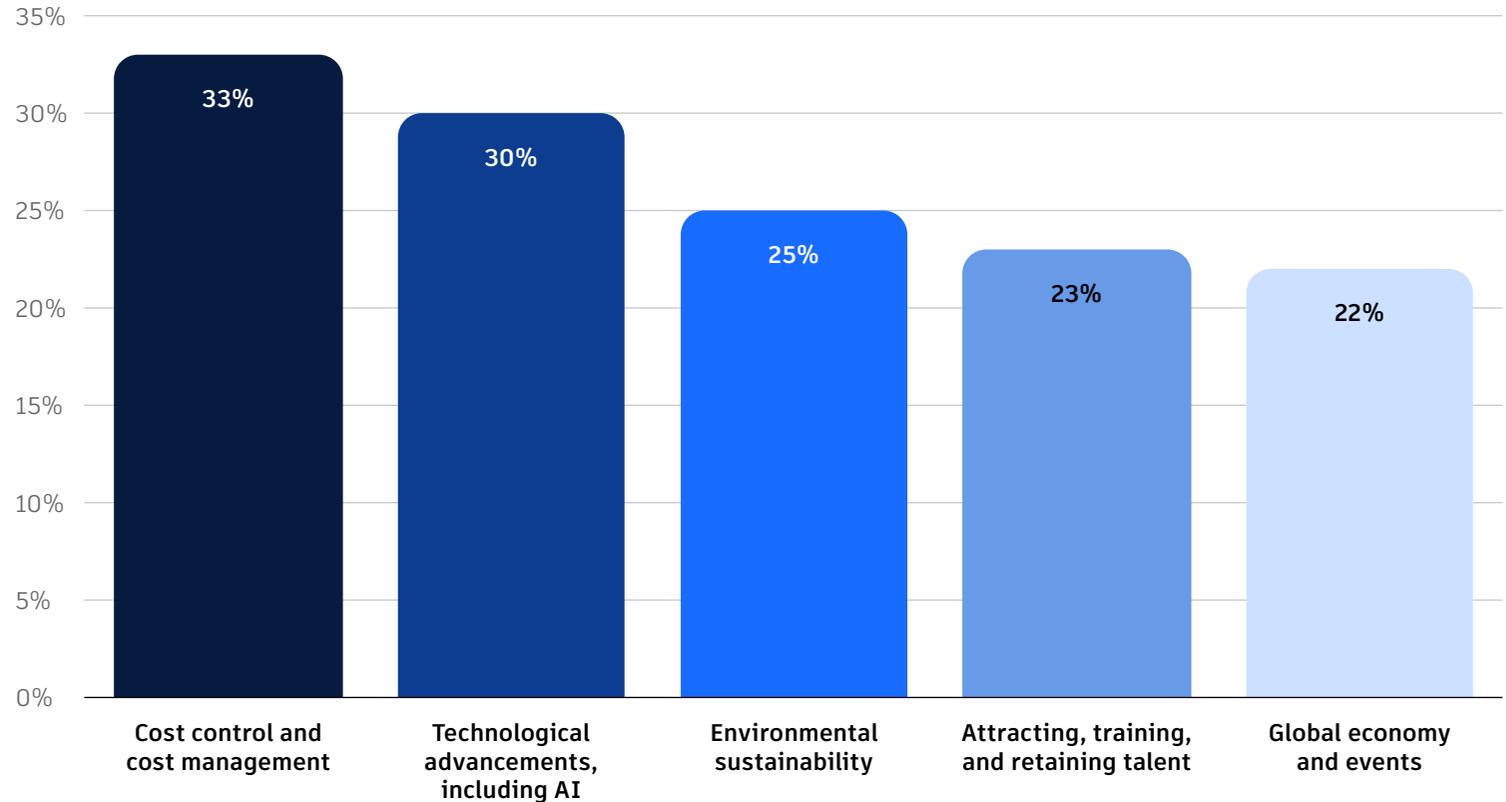
INSIGHT 5: EMEA

In the wake of a year of geopolitical and economic turmoil, continued inflation, and supply-chain fragility, it's not surprising that cost control is top of mind for leaders in Design and Make industries, with 33% in EMEA citing it as their main business challenge.

Spending is down in nearly all categories, from technology to talent, as leaders hope to mitigate the continued challenges of a post-pandemic economy. This dip in future investments could compound both talent and technology troubles, as organizations will struggle to do more with less.

Cost control is the top global challenge

AI and other emerging technologies a close second



EMEA respondents. Survey question: What are the top three challenges your company or organization faces today? Select up to three. 12 response options.



INSIGHT 5: EMEA

Thirty percent of leaders in EMEA identify technological advances (including AI) as a top challenge as their organizations struggle to implement new and emerging technologies. Cost-control measures will likely have a downstream impact here, and could affect how quickly companies are able to reach their technology and digital transformation goals.

Ironically, cutting investment in technology can have a negative impact on budgets, since new tools and processes can often lead to greater efficiencies across the organization. For instance, leaders at data-effective organizations see cost as less of a challenge—just 27% identify it as a top concern compared to 34% at other organizations. Sustainability remains a perennial

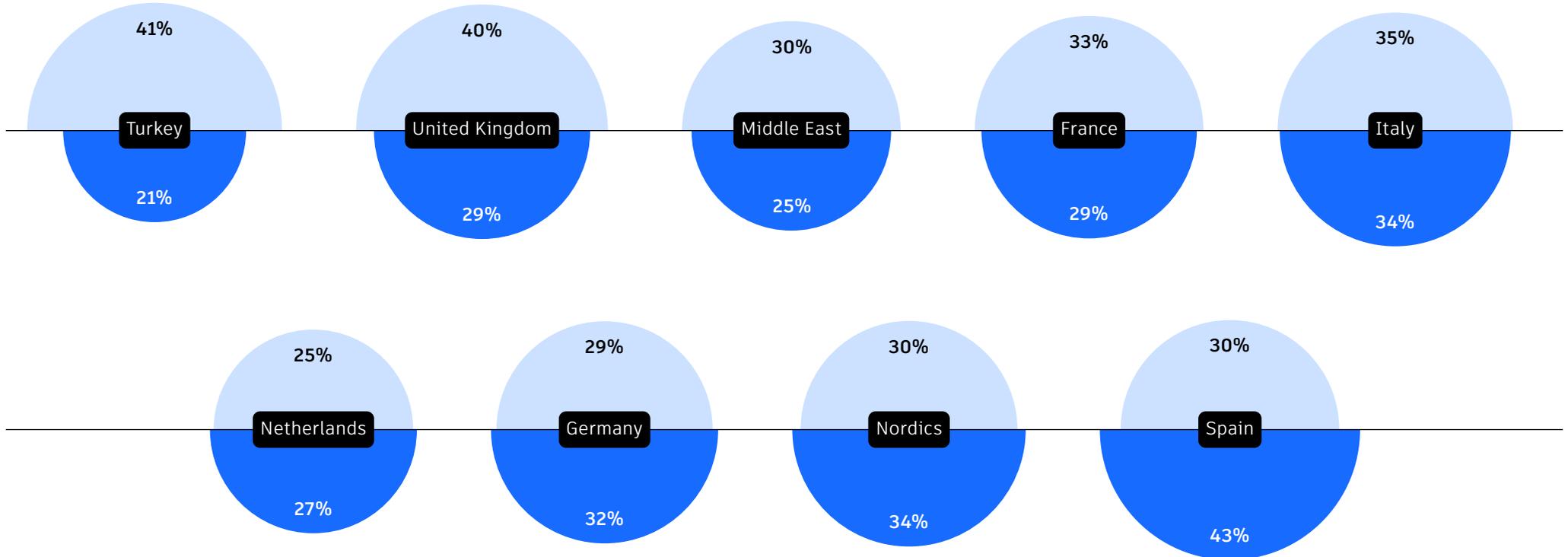
struggle, identified by 25% of leaders as a top challenge at their organization. The search for skilled talent is also difficult, with nearly two-thirds of leaders saying they struggle to find the skills they need. Exacerbating the talent crunch is the growing number of organizations that are letting people go because they lack the right technical skills, further widening their talent gap.

“There are a lot of challenges, but our biggest one has been the increase in the requirements of facades. They’re getting more complex because we need to work in 3D instead of 2D, which people can find difficult. Teaching people planning in 3D and design has been a huge challenge. Another challenge is our supply chain, which is impacted by the pandemic and inflation.”

ANNA NONEDER
BIM and Change Manager, Lindner Group,
an interior construction specialist headquartered in Germany

EMEA region split on top challenge

EMEA: ● Cost control and cost management ● Technological advancements, including AI



Percentage of respondents who selected "cost control and cost management" and "technological advancements, including AI" as their top challenge. Survey question: What are the top three challenges your company or organization faces today? 13 response options.

INSIGHT 5: EMEA

EMEA is a land of contrasts when it comes to the top challenges identified by respondents. This region includes both the country where the smallest percentage of respondents say technology, including AI, is a top challenge, Turkey (21%), and the country where the largest percentage of business leaders sees it as a top challenge, Spain (42%).

During qualitative interviews, business leaders in the region cited security concerns and regulatory confusion as common obstacles for implementation of AI solutions.

“Our industry is interested in the application of AI to automate designing and creating maps. But concerns about security have prevented us from exploring AI further.”

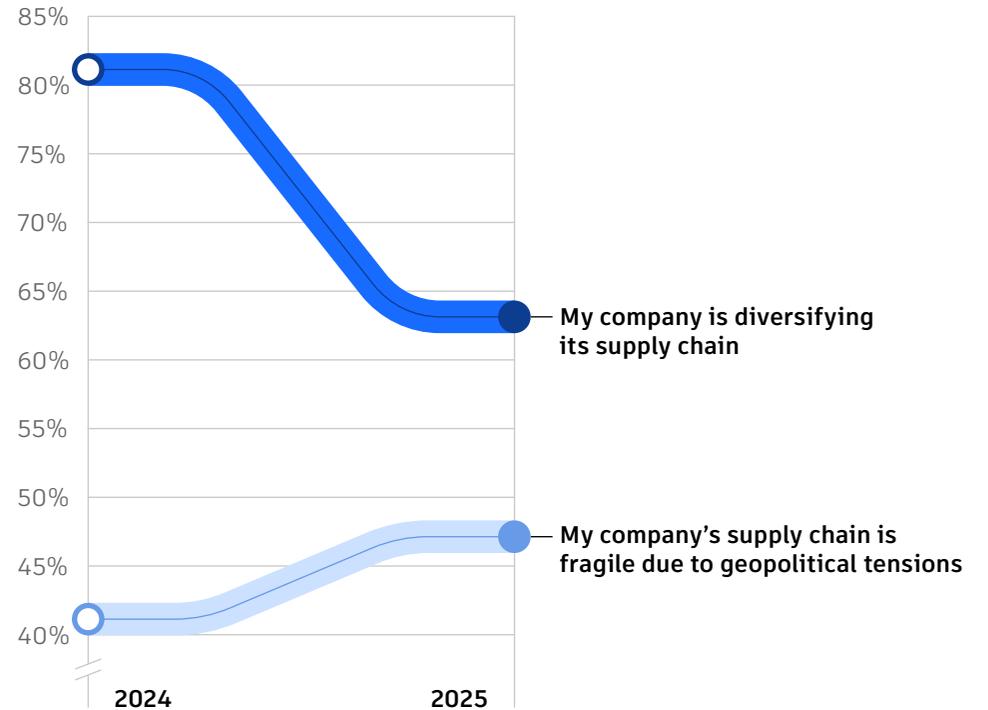
GREGORY ZATKA

Head of Digital Assets Management, EuroAirport Basel-Mulhouse-Freiburg,
a French international airport

INSIGHT 5: EMEA

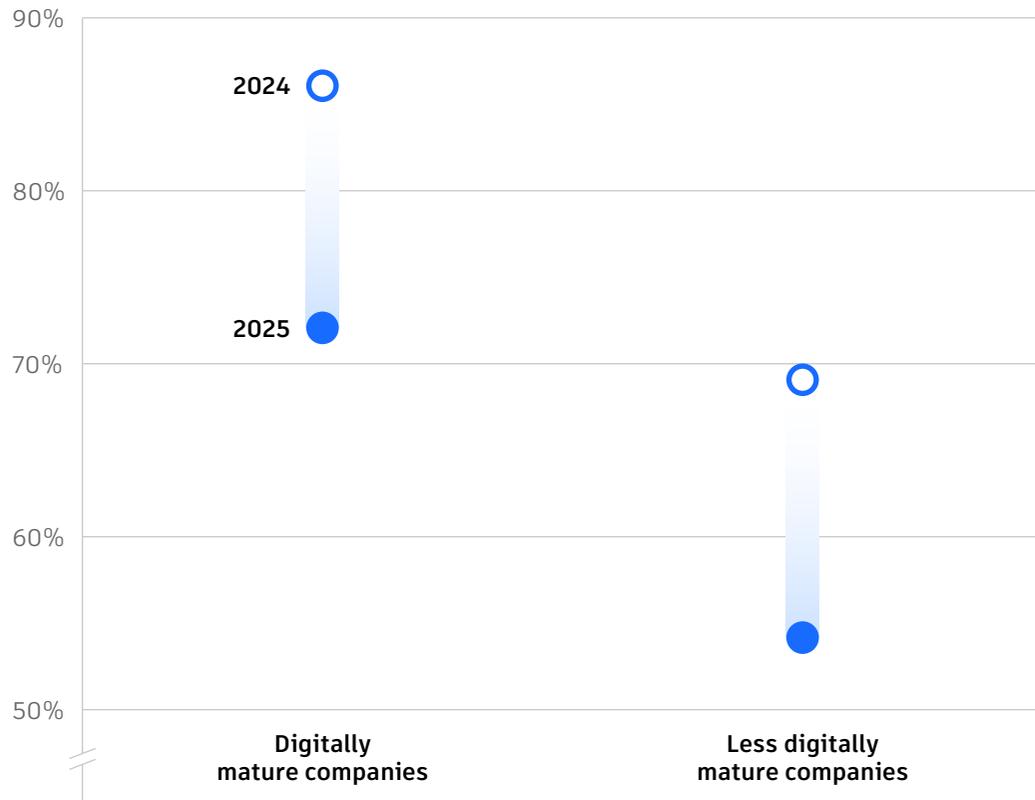
Supply chains remain fragile and undiversified

Supply-chain diversification is down despite increased global uncertainty



EMEA respondents. Percentage of respondents who agree to the statements: 1. My company's supply chain is fragile due to geopolitical tensions. 2. ...to be more resilient... My company is diversifying its supply chain. 5-point scale. Top two = agree.

Digitally mature companies 33% more likely to diversify their supply chains



EMEA respondents. Percentage of respondents who agree to the statements: ...to be more resilient... My company is diversifying its supply chain. 5-point scale. Top two = agree. For the definition of digital maturity, see glossary.

Supply-chain reliability continues to be a concern in EMEA, with 47% of business leaders saying their supply chain is fragile due to geopolitical tensions, up from 41% last year.

Despite this increased fragility, there is an industrywide decline in the percentage of leaders who say their organizations are diversifying their supply chains. This year saw an 18-point drop (to 63%) in the number of leaders saying their company is diversifying their supply chains.

During interviews, leaders cited the cost of diversification, competing

demands within the organization, and the lack of alternative options to their current supply chain as ongoing struggles with supply-chain resilience.

But one additional and critical factor companies need to consider when it comes to supply-chain stability is digital maturity. Survey results this year revealed that digitally mature organizations in EMEA were 33% more likely to diversify their supply chains—giving them a significant edge when it comes to resilience.

Leaders are cautious in the near term

04
05
06
07



INSIGHT 6: EMEA

This year saw a general cooling of sentiment across Design and Make industries, with the majority of business leaders feeling both more uncertain about the future and less prepared to handle unforeseen changes.

In EMEA, 63% of leaders surveyed for this year's report agree that the global landscape is now more uncertain, a 13-point jump that represents a 26% increase year over year. Leaders are also less confident in their organization's ability to weather unforeseen obstacles, with just 59% saying they are well prepared, down from 77% in 2024.

This conflation of uncertainty and unpreparedness is having far-reaching impact across Design and Make industries in EMEA. From a general reduction in spending to decreased enthusiasm for new technologies, leaders are experiencing a lack of organizational confidence.

Leaders feel the future global landscape is more uncertain

+13 points
from 2024

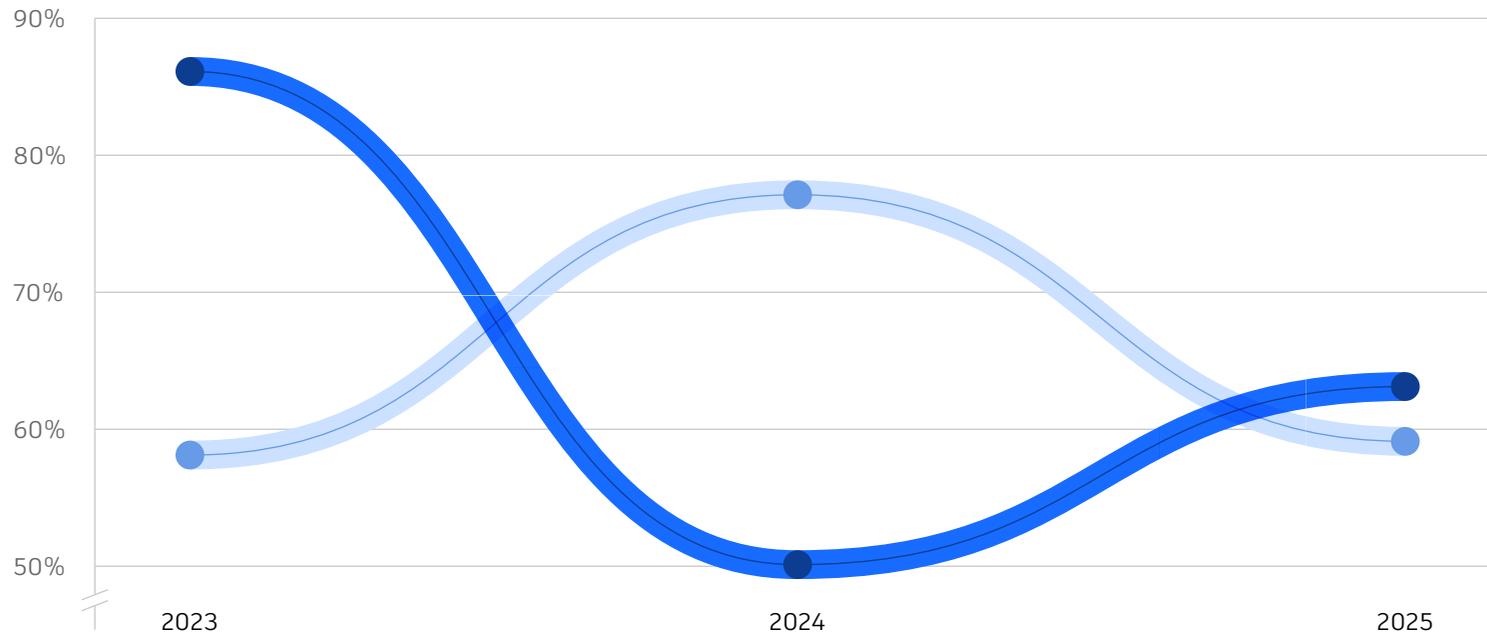
Leaders feel less prepared to handle unforeseen future changes

-18 points
from 2024

Leaders feel more uncertain about the future and less prepared to face it

Global uncertainty is affecting organizational confidence

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

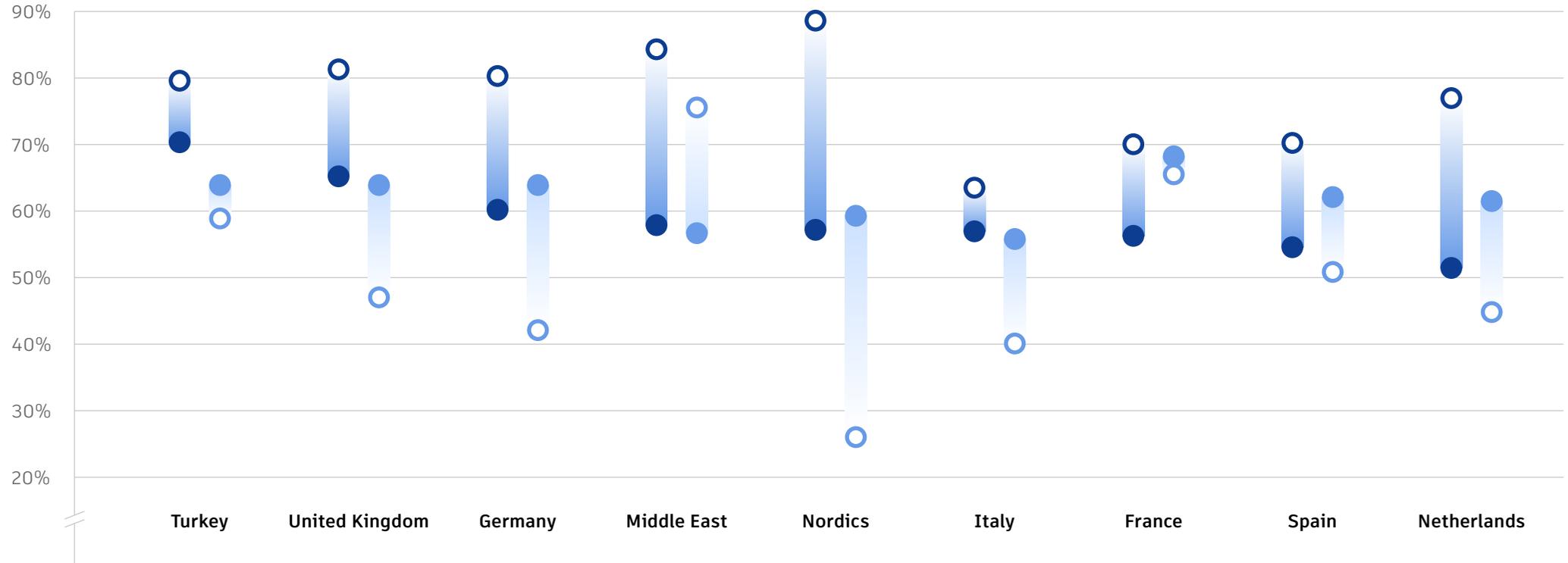


Percentage of respondents who agree to statements: 1. My company is well prepared to handle unforeseen future macroeconomic and geopolitical changes. 2. The future global landscape feels more uncertain now than 3 years ago. 5-point scale. Top two = agree.

But amid uncertainty, some organizations in EMEA are faring better than others. Leaders at digitally mature organizations, for example, feel better prepared to handle unforeseen changes—72% of leaders at these companies feel prepared, compared to only 47% at less digitally mature organizations. And data-effective organizations are most confident, with 82% of leaders at those organizations feeling prepared to handle unforeseen changes. This points to yet another advantage of digitalization across Design and Make industries: increased resilience.

Nordics sees the largest swing in both preparedness and uncertainty

EMEA: ● My company is well prepared to handle unforeseen future changes ○ 2024
 ● The future global landscape feels more uncertain now than 3 years ago ● 2025



Percentage of respondents who agree to 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.



INSIGHT 6: EMEA

In EMEA, the Nordics saw the largest change in sentiment year-over-year. Just 57% of leaders in the region feel prepared to handle unforeseen macroeconomic or geopolitical changes, down significantly from 88% in 2024.

The Nordics also saw a dramatic increase in the percentage of respondents who agree that uncertainty is on the rise, from

26% to 59%. This swing in both uncertainty and preparedness is due to a confluence of factors. In interviews, leaders said this swing in both uncertainty and preparedness was a delayed effect from the larger global economic downturn that just started impacting the construction industry in the region, along with uncertainty around the impact of various tariffs and trade embargoes.

“We are a very diversified company because we work in more than 100 countries on many elements of the value chain and in many verticals: rail, energy, buildings, et cetera. So if there is a negative impact here, it’s mitigated by the rest of the activities. So we are not too worried, but, for sure, the industry has to be careful of what is happening. The geopolitical situation can have an impact.”

PIERRE-YVES MASSILLE
CTO, Egis Group, an engineering and consulting firm headquartered in France

The search for talent intensifies, with a focus on AI skills

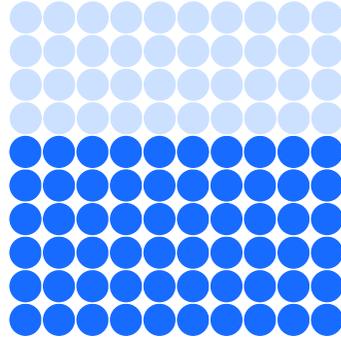
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INSIGHT 7: EMEA

Design and Make industries have struggled in recent years to find skilled talent, and this year that struggle has become acute enough to hinder growth. In EMEA, 55% of business leaders say that lack of access to skilled talent is a barrier to their company's growth, up from 37% in 2024.

When it comes to bridging and filling the skills gap, digitally mature companies are at a distinct advantage. In EMEA, 75% of digitally mature companies will invest more in digital training, compared to 61% of less digitally mature companies. They are also more likely to implement continuous learning programs than less digitally mature companies, at 71% and 56% respectively. Digitally mature companies also see a boost when it comes to talent. In EMEA, 24% of digitally mature companies report improved talent acquisition and retention as a benefit of digital transformation compared to only 16% of less digitally mature companies.

60% in EMEA say they have difficulty finding employees with the right skills



In EMEA, 60% of business leaders worldwide agree that new employees with the right technical skills are difficult to find, up from 41% the previous year. Moreover, the number of leaders who say they have had to let people go because they lack technical skills has jumped to 47%, up from 30%, compounding labor shortage problems.

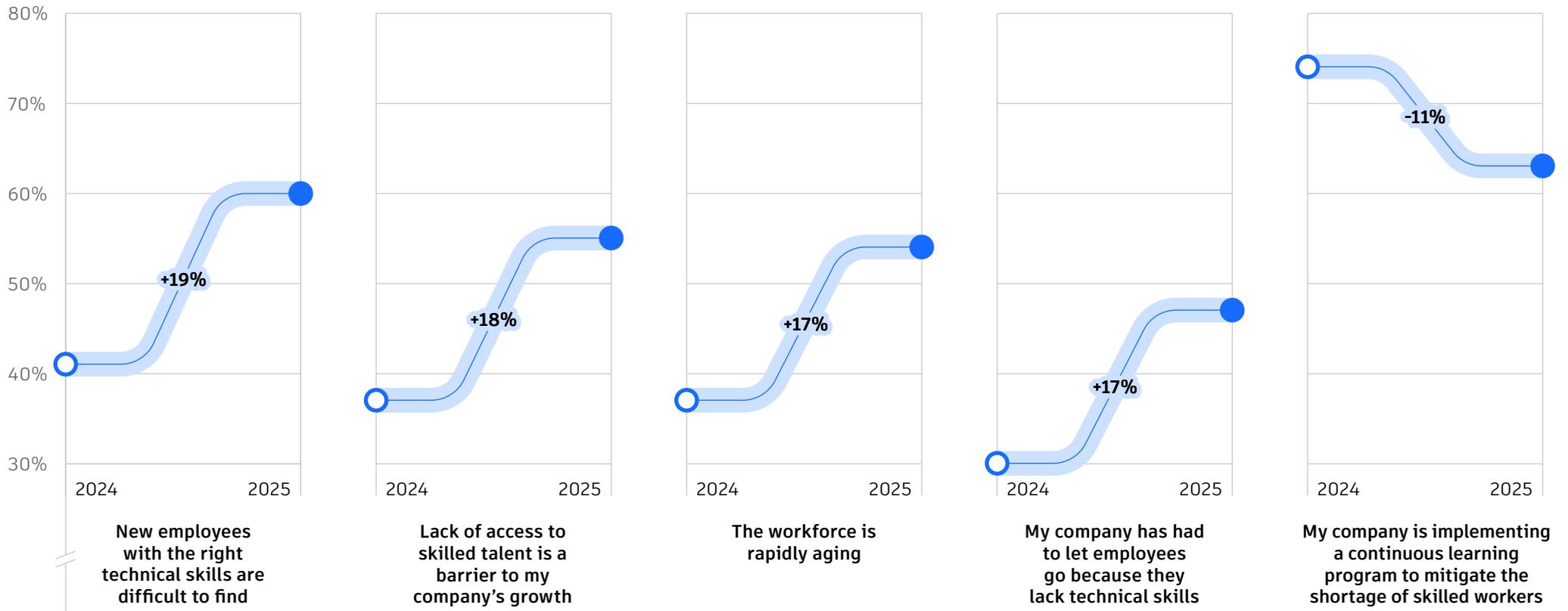
“I think it’s finding that right balance of finding the right tech skill set and also the practical application of the skill. I think we found people that might be very good at using a tool, but that doesn’t mean they can solve a problem.”

OLIVER HALL

BIM Manager - Senior Staff, Stefan Antoni Olmesdahl Truen Architects (SAOTA), an architecture and design firm headquartered in South Africa

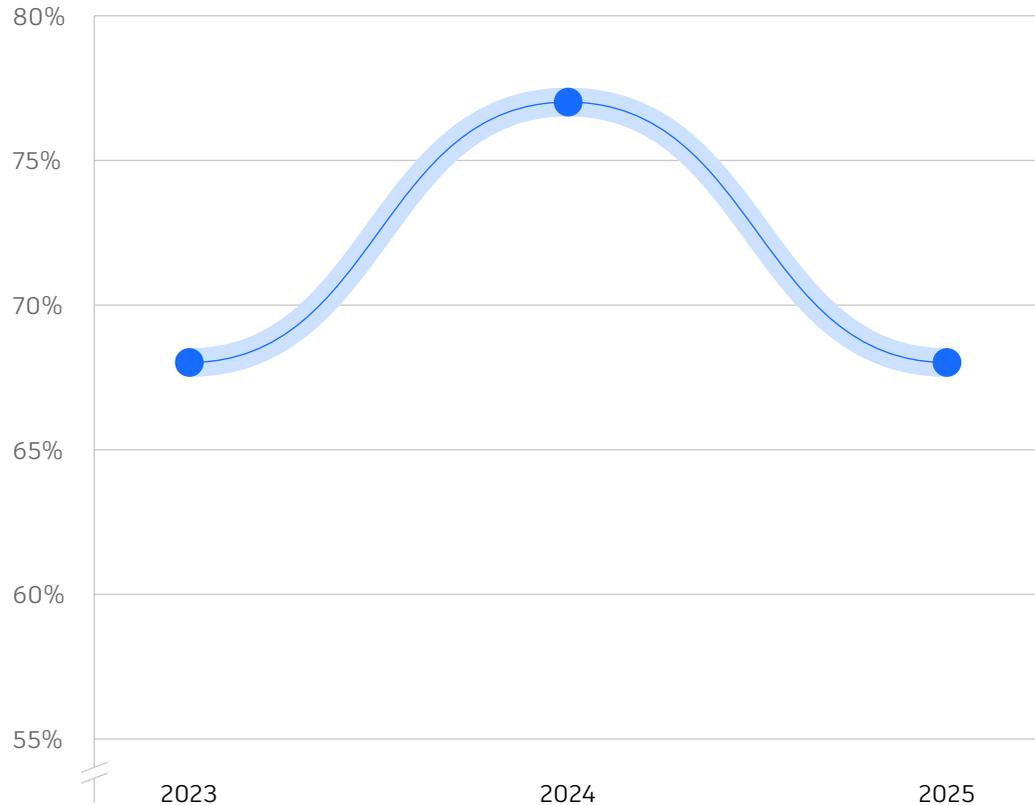
Nearly two-thirds of organizations are confronting a skills gap

36% year-over-year increase in leaders who say they struggle to find candidates with the right technical skills



EMEA respondents. Percentage of respondents who agree to statements: 1. New employees with the right technical skills are difficult to find. 2. My company has had to let employees go because they lack technical skills. 3. Lack of access to skilled talent is a barrier to my company's growth. 4. The workforce is rapidly aging. 5. My company is implementing a continuous learning program to mitigate the shortage of skilled workers. 5 point scale. Top two = agree.

Despite the skills gap, investment in training is down



EMEA respondents. Percentage of respondents who agree to the statement: In the next 3 years, my company is planning to invest more in digital skills training. 5 point scale. Top two = agree.

One way to bridge the skills gap is to invest more in workforce training through continuous learning programs, but implementation of continuous learning programs has declined to 63%, down from 74% in 2024.

Budget aside, training holds other challenges. In EMEA, 46% of respondents say they do not have the resources to design internal training programs, up 10 points over last year, indicating that the tight labor

market is impacting initiatives across organizations.

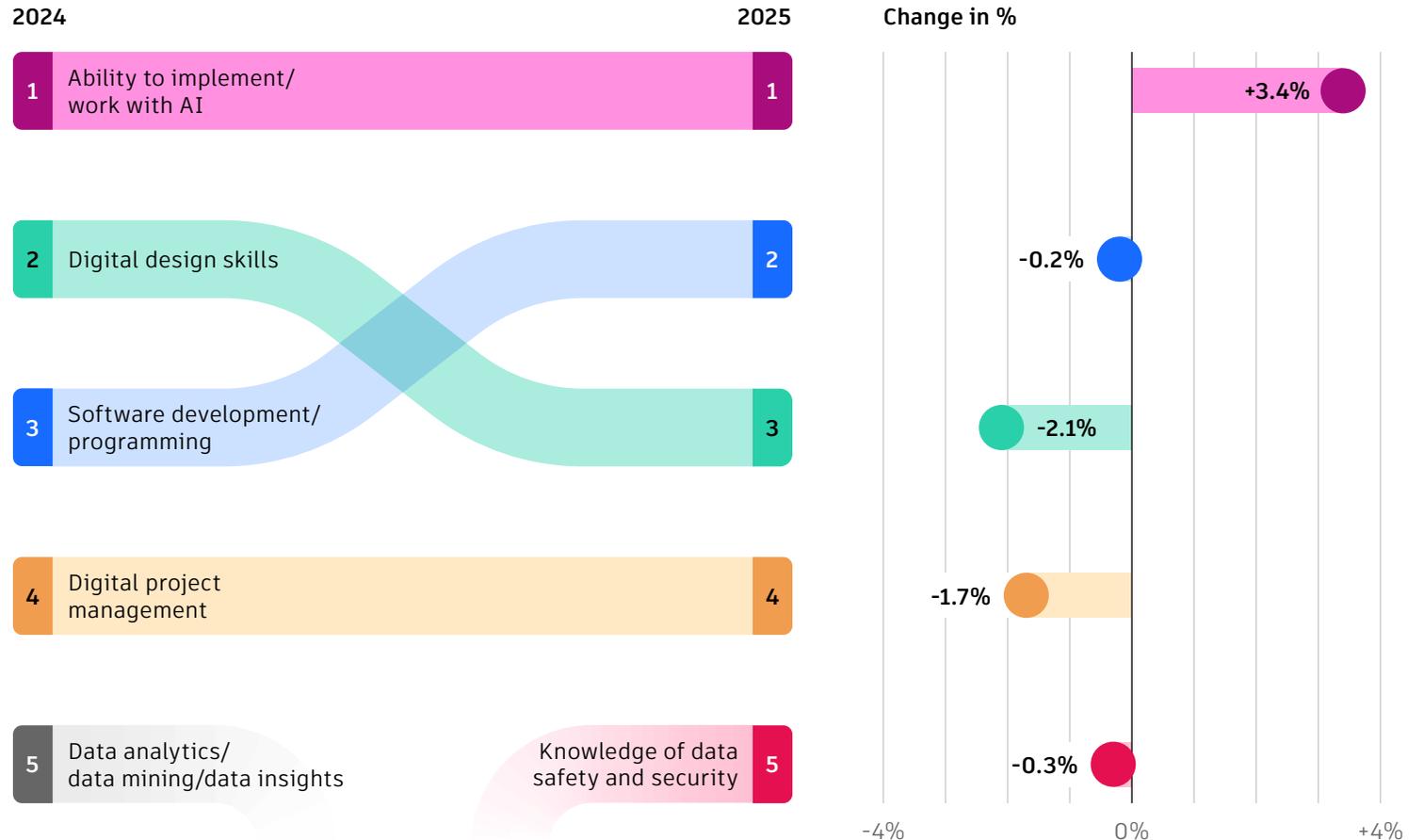
Confronted by multiple implementation obstacles, some organizations are turning to third parties to train their employees. While external training programs seem like an ideal solution for those organizations tight on resources, their efficacy remains in doubt, with 50% of leaders saying these do not meet the needs of their organization.

“Finding the right talent is challenging. They have to know how to work with the software and have a technical understanding of the product we are designing. It can be very hard and expensive to find people.”

CHRISTIAN AHLERS
 CAD Systems Administrator,
 Lindner Group, an interior
 construction specialist
 headquartered in Germany

Forty-four percent of leaders in EMEA say the ability to work with AI will be their top priority when hiring in the next few years, up from 41% last year. This indicates that, despite a more cautious approach to the technology this year, leaders are still dedicated to integrating AI into their organizations.

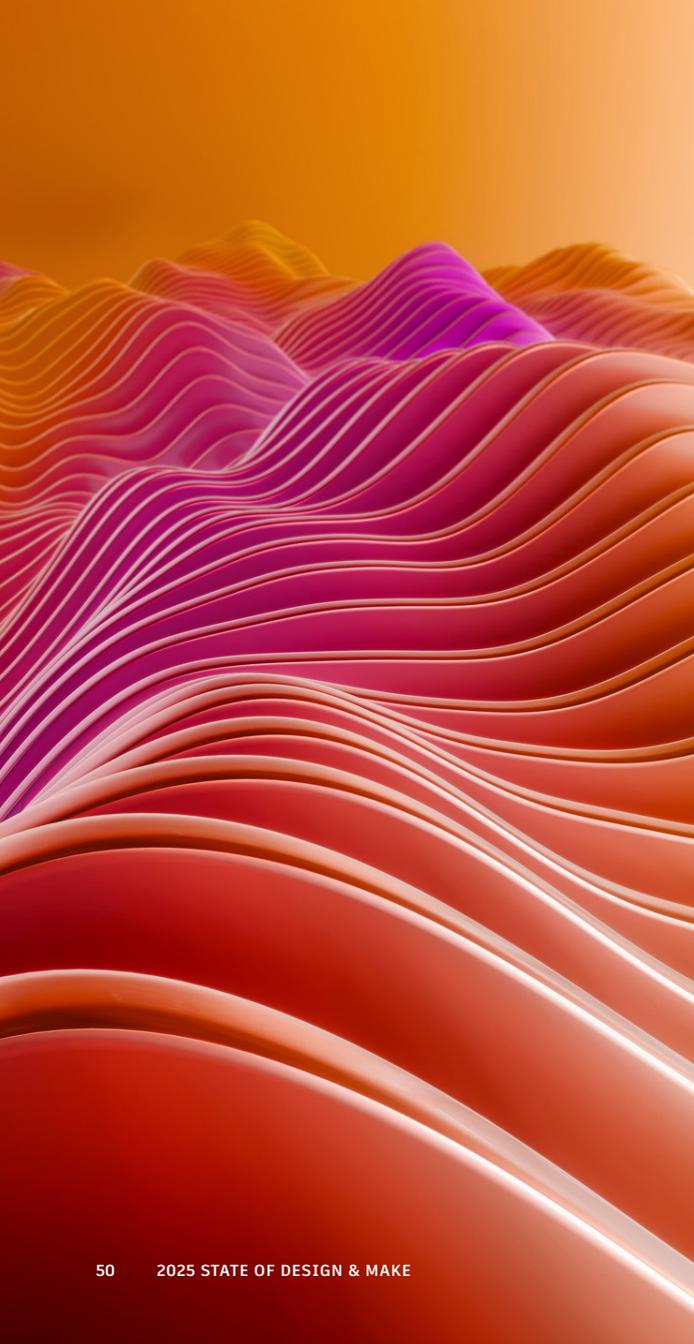
AI skills top the list of future hiring priorities



EMEA respondents. Survey question: What technical or digital skills do you believe your company or organization will be prioritizing when hiring over the next 3 years? Select all that apply.

Investments remain
strong but reflect
uncertainty

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INSIGHT 8: EMEA

“We have many investment projects going on in the airport industry, including renovations of runways and airport growth. Unlike other industries, I feel airports are doing quite well.”

GREGORY ZATKA

Head of Digital Assets Management, EuroAirport Basel-Mulhouse-Freiburg, a French international airport

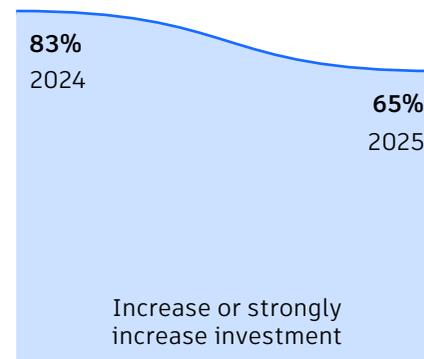
Future investment projections have fallen this year but are still robust—65% of business leaders in EMEA say their organizations will increase or strongly increase their investments over the next three years. While this reflects confidence in the future, this number is down from 83% last year, indicating that leaders are being more conservative in an uncertain geopolitical and macroeconomic environment.

However, digitally mature organizations are significantly more bullish on the future, with 76% of

leaders planning to increase future investments, compared to 53% at less digitally mature companies.

Further, future investments are higher at data-effective companies where 82% of leaders say they will increase future investments. This indicates that organizations are seeing outsize benefits from their investments and that digital transformation efforts may have eased implementation challenges, resulting in long-term cost savings and productivity gains.

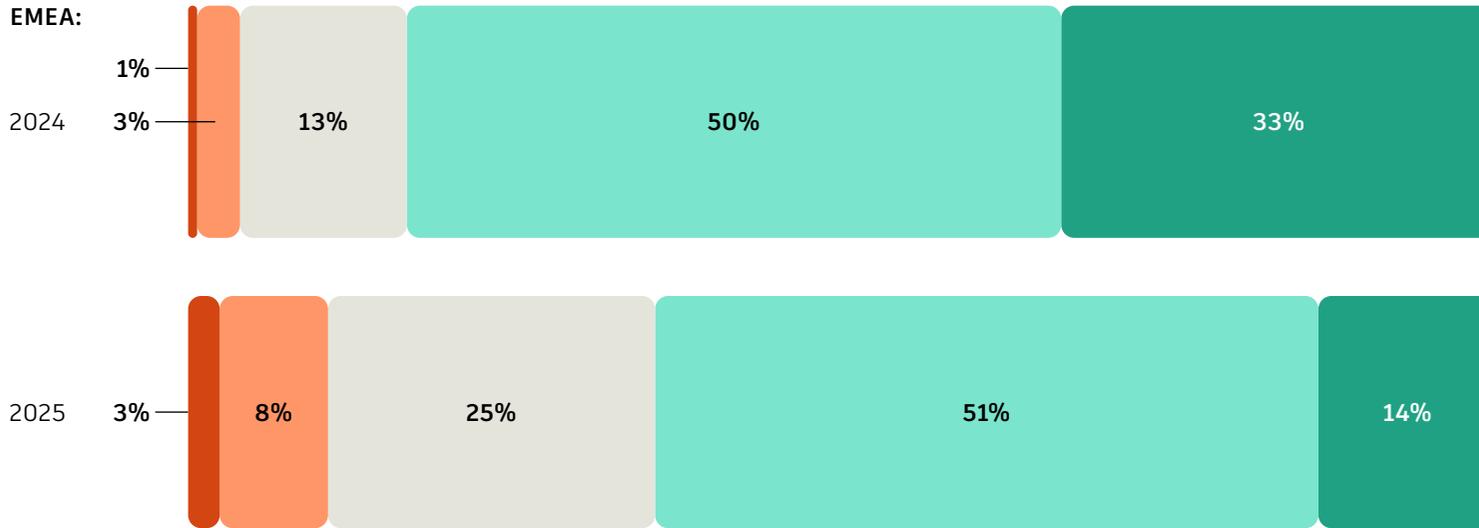
EMEA businesses scale back investment plans



Future investments still robust

Two-thirds of organizations will increase their investments, down from 2024

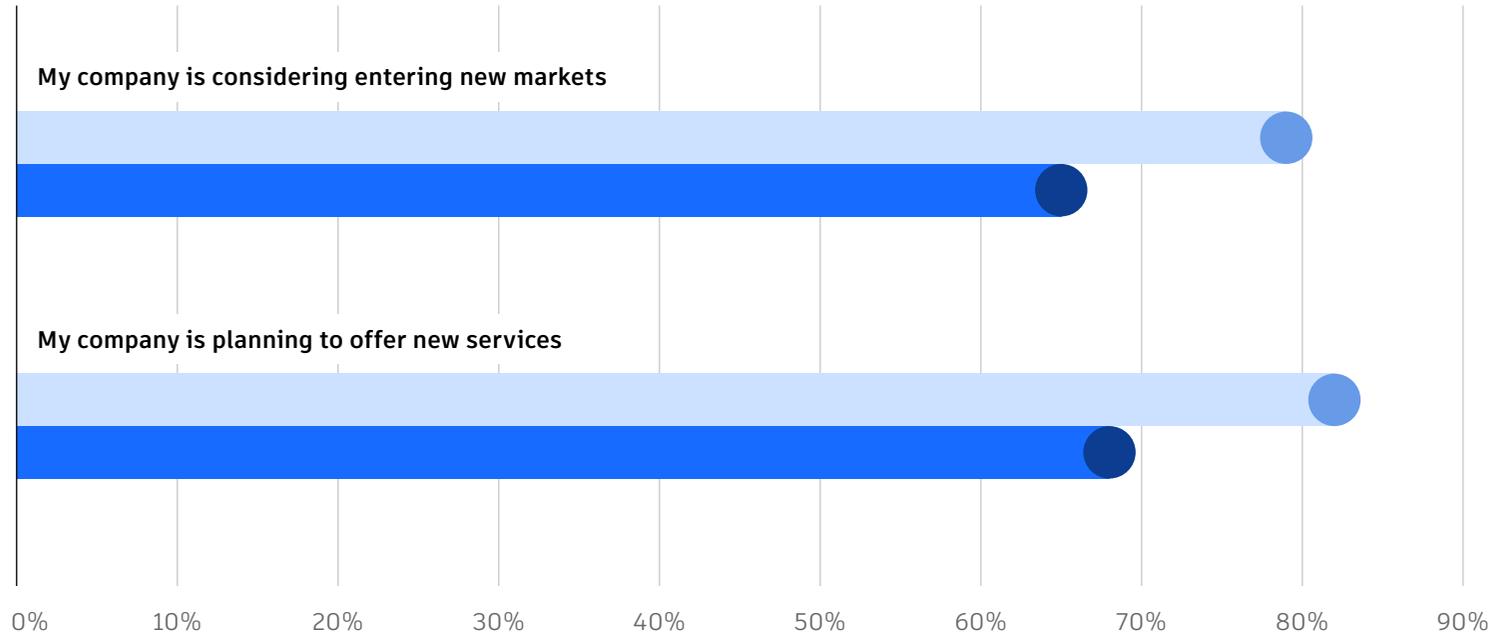
● Strongly decrease ● Decrease ● Stay roughly the same ● Increase ● Strongly increase



Survey question: How do you think your company or organization's level of investment will shift over the next 3 years?
5-point scale. Values do not add up to 100% due to rounding.

Companies are pulling back on expansion efforts

EMEA: ● 2024 ● 2025



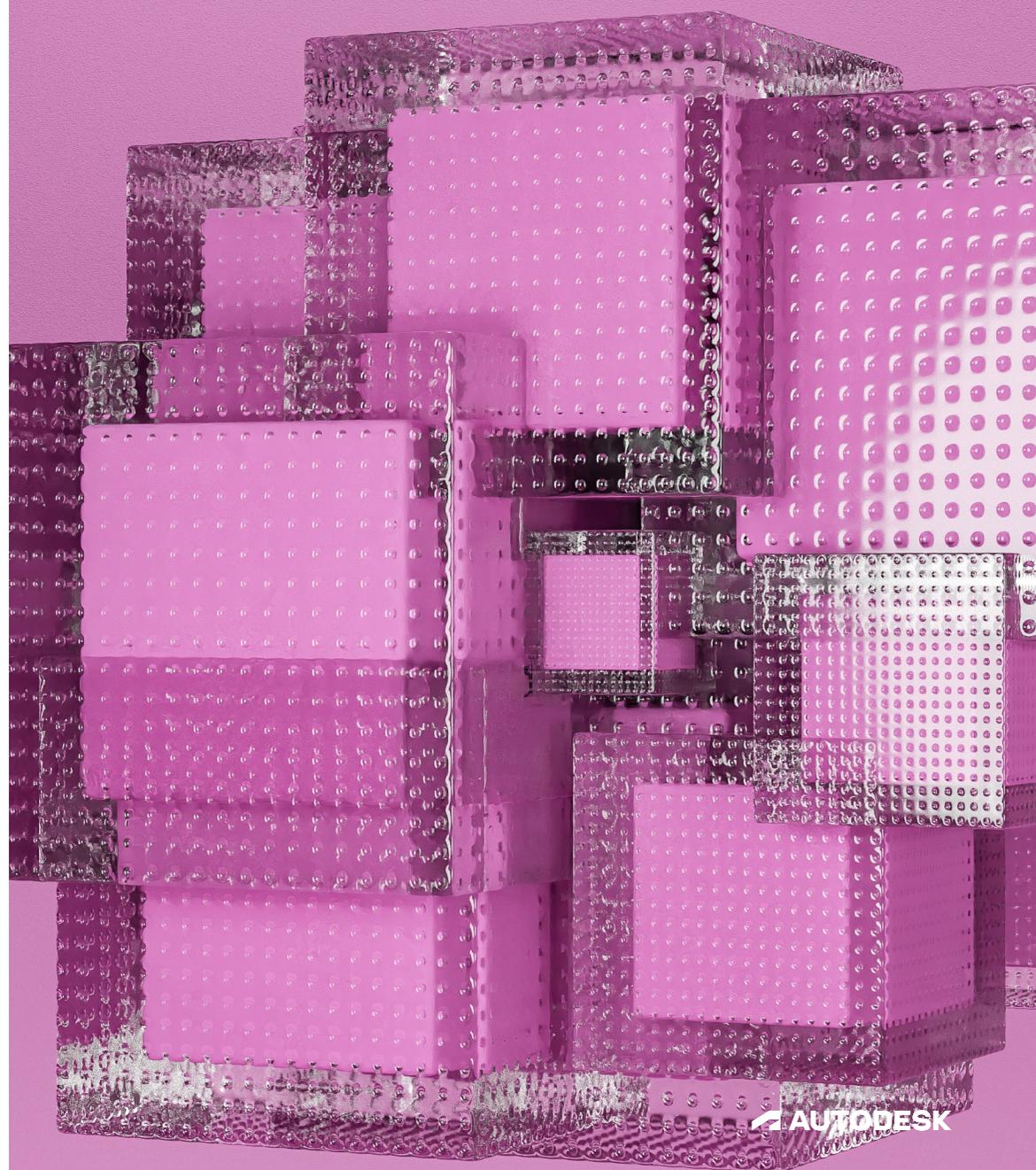
Percentage of respondents who agree to statements: 1. My company is considering entering new markets. 2. My company is planning to offer new services.
Survey question: To what extent do you agree or disagree that your company or organization is doing the following to be more resilient? 5-point scale. Top two = agree.

INSIGHT 8: EMEA

Most EMEA leaders surveyed for the 2025 *State of Design & Make* report say their companies continue to invest in entering new markets and in offering new products and services, but at a lower rate than last year—65% say they will enter new markets this year, compared to 79% in 2024.

Enthusiasm for offering new services is also down, with 68% of leaders this year saying they will offer new services compared to 82% last year. These findings echo the global drop in sentiment seen this year and align with efforts to control costs in the near term.

But as with so many aspects concerning Design and Make industries, digitally mature organizations are much less likely to be affected by this general belt-tightening. In EMEA, 74% of digitally mature companies say they are considering entering new markets, compared with 56% of less digitally mature companies. They are also more likely (76%) to offer new products and services than their counterparts (60%), and to increase their investments into acquisitions (65% compared to 42%). These actions give digitally mature organizations a competitive advantage, allowing them to expand while others contract under market pressures.



Conclusion

Regardless of recent headwinds, leaders in Design and Make are focused on solving today's problems with an eye toward future opportunity. While cautious in the near term, leaders that want to gain a competitive edge need to think about the long-term benefits of investing in digital transformation now—and the implications that falling behind could have across the organization.

Methodology

For the 2025 report, Autodesk surveyed and interviewed 5,594 industry leaders, futurists, and experts in the architecture, engineering, construction, and operations; product 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.

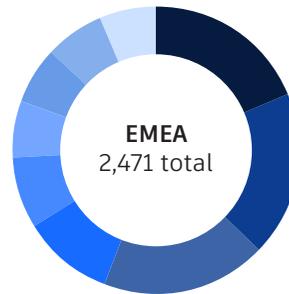
The quantitative data in this EMEA subsample (n=2471) was collected between May and August 2024 through a 20-minute online survey.³ Autodesk partnered with Qualtrics for the collection of this data. In addition, 34 qualitative interviews with business leaders and futurists were conducted in October and November 2024.

EMEA survey sample:

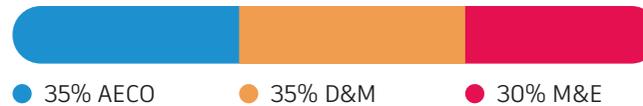
2025:
2,471 EMEA respondents

2024:
2,389 EMEA respondents

2023:
1,027 EMEA respondents



- 19% France
- 19% Germany
- 19% United Kingdom
- 11% Middle East
- 8% Nordics
- 6% Italy
- 6% Netherlands
- 6% Spain
- 6% Turkey



69%

of survey participants are decision-makers in their companies

11 years

is the average time of experience in their industry

33%

of respondents said that they primarily use Autodesk Design and Make software

³ 2025 State of Design & Make questionnaire

Glossary

Data-effective companies:

Respondents were asked “How effective would you say your company or organization is at leveraging data?” Those who responded with “very effective” on a 4-point scale are referred to as data effective companies. This is 16% of respondents.

Digital maturity:

Respondents were asked how far their companies were in their transformation journeys. Respondents who described their organization as “early stage” or “right in the middle” of their digital transformation journeys are considered less digitally mature companies. Those who responded “approaching the goal” or having “achieved the goal” of digital transformation are considered more digitally mature companies. Of the EMEA respondents, 49% are digitally mature.

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, mobility, 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:* Sixty-nine 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 owners/entrepreneurs, directors, and VP- and C-level executives.
- *Experts:* The remaining 31% of respondents are referred to as experts. This group includes respondents at the nonmanagerial level and managers.

Region:

APAC: Asia-Pacific

Australia, China, India, Japan, Singapore, 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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