

Deltek®

Clarity: Architecture & Engineering Industry Study

Trends and Benchmarks in EMEA and APAC

3rd Annual Comprehensive Report

In collaboration with:

 Longitude

A Financial Times Company



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INTRO

Worldwide, the recovery is progressing, but the pandemic's effects continue to be unpredictable. In response, architecture and engineering firms are proving their adaptability and strategic strength.

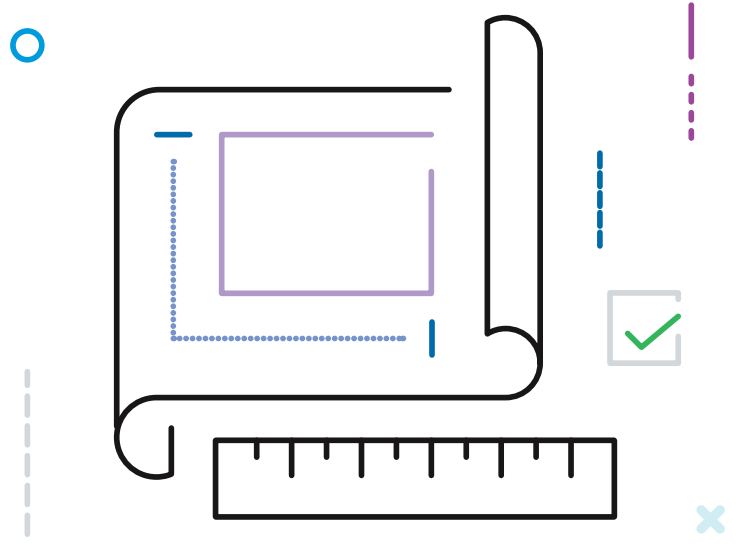
Yet a fiercely competitive environment and rising costs remain concerns as business leaders look to the future and focus on modernisation. How can firms move forward in a way that both safeguards their future and sets them apart from the competition?

The Deltek Clarity Architecture & Engineering Report shows that the architecture and engineering (A&E) industry understands how important it is to commit to digital transformation. More than half (55%) admit they will lose market share within two years without more progress in this area. However, the digital ambitions of organisations across Europe and Asia Pacific (APAC) are more restrained than they were a year ago.

The urgency we saw in last year's report has lessened as leaders consider the gap between what they need to do and what's possible within their business. As restrictions have eased, opportunities have opened up, but there are also more questions – about the right technology investments, the best ways to find new clients and the most effective ways to manage hybrid working.

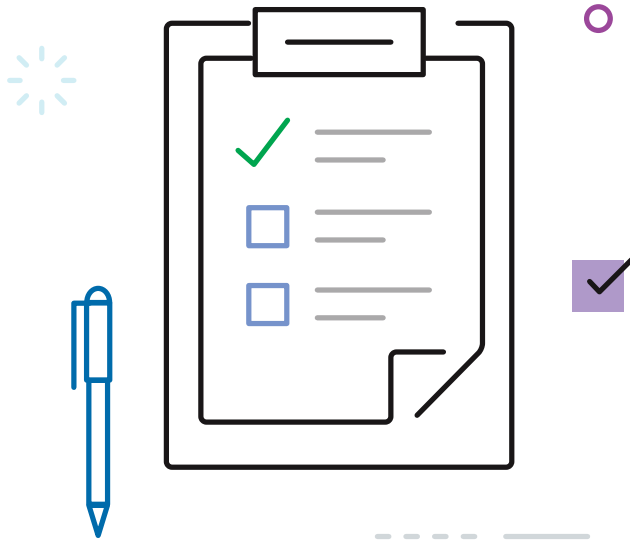
At the same time, talent shortages are having a considerable impact across the industry and efforts to hire more staff may fail in the current landscape. Firms that invest in knowledge-sharing, improving employee wellbeing and internal training and reskilling will be more likely to grow in the year ahead.

This study gives firms in A&E industry a way to benchmark their performance and digital maturity and assess what they need to do to be successful moving forward.



ABOUT THE STUDY

Each year, Deltek surveys firms in the A&E industry to identify key performance indicators (KPIs), market conditions and industry trends. This is our third report focusing on A&E organisations across Europe and APAC.



We surveyed 600 decision-makers across all size of businesses (30% from 20 to 50 employees, 30% from 51 – 250, 30% from 251-500, 10% from 500+) to examine technology trends, attitudes towards digital transformation, existing and future challenges, the role of leadership, financial benchmarking and KPIs.

Methodology

The online survey was conducted between December 2021 and February 2022, with financial metrics representing 2021 financial performance. Individual responses were gathered from 600 senior decision-makers in companies of all sizes across the A&E industry.

Firms face different issues depending on their size, industry and region. We have signposted these factors in the report to make it easier for businesses to benchmark themselves against their competition.

Company Type

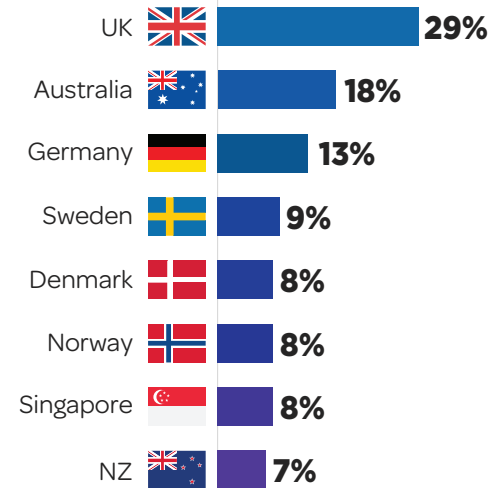
The term architecture and engineering (A&E) refers to all architecture, engineering and allied companies included in the study.

We also break out two broad segments for comparison:

- Architecture (A) or architecture/engineering (A/E) firms are either pure architectural design firms or architecture-dominant firms that also provide engineering services.
- Engineering (E) and engineering/architecture (E/A) firms are either pure consulting engineering firms or engineering-dominant firms that also provide architectural services. E/A firms are also known in the industry as 'big E, little A' firms.

This study examines how companies performed during the 2021 fiscal year, as companies navigated a pandemic and a drastically changed global business environment. The leaders we surveyed recognise the need for efficient project management, business development and benchmarking. The findings can help companies identify how they compare to others in the industry and develop strategies to move forward.

Country Breakdown



In this study, 40% of participants were from architecture or A/E firms, and 60% were engineering or E/A firms.

EXECUTIVE SUMMARY



This study has uncovered the issues that are affecting the A&E sector, including how firms are responding to the worldwide business recovery, the rising skills and talent gap, and how they are moving forward with digital transformation.

Technology investment is crucial as companies continue to face increasing competition in a complex marketplace. But establishing the right priorities is proving difficult for firms as they try to strike a balancing act between modernisation, growth and corporate social responsibility (CSR).

In today's climate, strong CSR credentials will be essential to growth: 81% of firms say that having a formal policy for sustainability is crucial to remaining competitive. Adrian Malleson, Head of Economic Research and Analysis at RIBA, says that COP26 was a "turning point" for the industry and companies can no longer ignore their environmental impact.

- The sustainability agenda is non-negotiable
- The talent crisis is reaching all parts of the organisation
- Firms are more restrained in their digital ambitions this year
- Confidence in project delivery is increasing as firms track more KPIs
- Business development functions are targeting geographic expansion
- Growth is a major challenge for finance leaders

SECTION ONE

Technology Trends

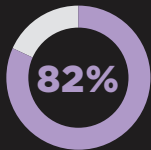
Technology plays a key role in enabling A&E firms to manage business challenges, and businesses recognise the imperative to commit to digital transformation.

Emerging technologies are all rated as more important to businesses than last year, with data science seen as the most crucial of all.

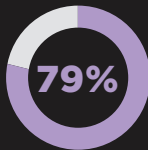
Yet just 2% of firms describe their digital transformation maturity as advanced, a fall from last year – as the pace of change continues to accelerate,

they are also less confident they will reach the advanced stage within five years.

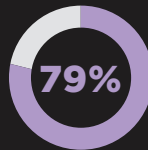
Top three most important emerging technologies



Data science



Artificial intelligence



Internet of Things



KEY DATA POINTS FROM THE SURVEY

1 **Technological advantage.** 80% of firms believe that investing in technology to improve operations will help them win more business.

2 **Digital ambitions are more restrained.** 29% of firms say their digital transformation maturity will be 'advanced' in five years' time, compared with 40% the previous year.

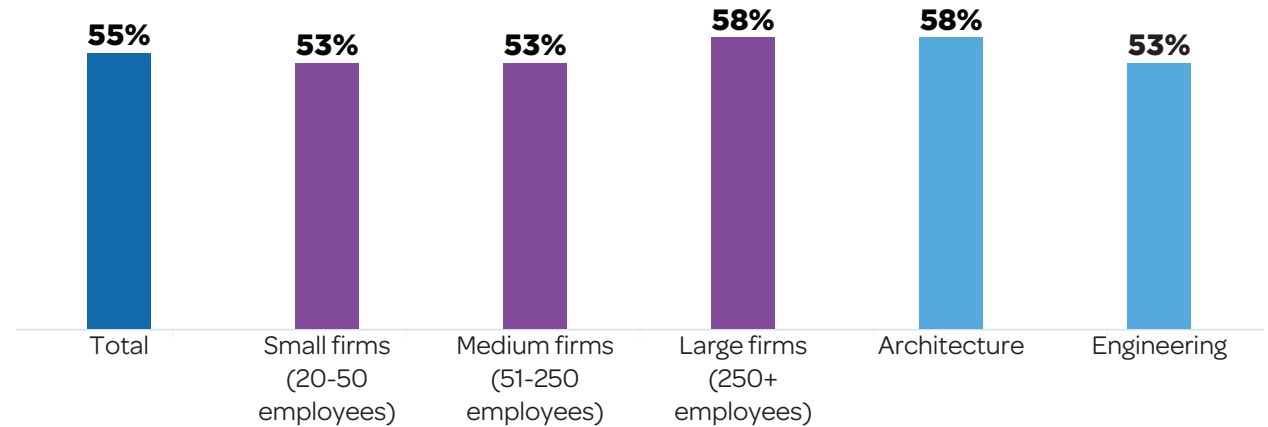
3 **Perceived importance of emerging technologies soars.** Artificial intelligence, Internet of Things and data visualisation technologies have made significant gains from last year. However, their application is conservative: only 44% of firms, for instance, expect to be using data visualisation technologies in three years' time.

Digital Progress

Firms are focused on strengthening their businesses, and they know that digital transformation is the way to go: 55% say they are already losing or will lose market share within two years if they

fail to make progress in this area, and 80% believe that investing in technology to improve operations will help their firm win more business.

Firms that Expect to Lose Market Share in Two Years Without Digital Transformation



They are concentrating on the future and are ready to learn from the past two years – 64% say that Covid-19 highlighted weaknesses in their operations model. They know where their challenges are and are using this insight to target growth opportunities. For 40%

of firms, this means investing more in IT infrastructure that will give them the flexibility to keep pace with the unpredictable business environment.

Realistic Digital Ambitions

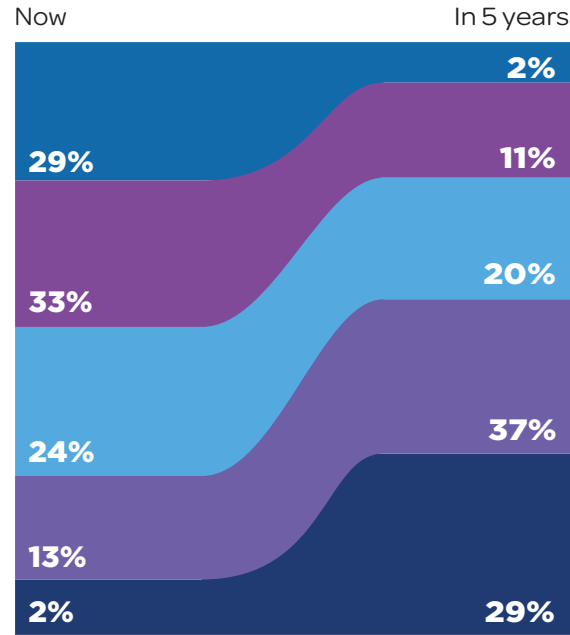
Significantly fewer firms than last year expect to be at the 'advanced' stage of the digital maturity curve in five years' time. They are also less optimistic about their current capabilities: only 2% put themselves in the 'advanced' stage now, compared with 4% last year, and 13% are in the 'mature' stage, compared with 14% last year.

With today's accelerated pace of change, it is likely that companies feel less able to reach an advanced stage of digital maturity because it is constantly evolving. This may mean they are pulling back slightly from digital investment and reassessing which technologies are essential – and which they can afford to sustainably invest in.



29% of firms say that their digital transformation maturity will be 'advanced' in five years' time, compared with 40% last year

The Digital Transformation Maturity Spectrum



- **Nascent.** There's a disconnect between business and digital IT initiatives or a misalignment with company strategy
- **Exploratory.** There's a recognition of the need for digital transformation strategy but execution is at the lighthouse stage, on an ad-hoc project, which is neither predictable or scalable
- **Applied.** There's alignment between business and IT goals and momentum to adapt, but not dedicated focus on the full disruptive potential of digital initiatives
- **Mature.** Business and IT management are integrated and delivering digitally enabled product / service experiences on a continuous basis
- **Advanced.** Digital transformation is a primary strategic focus at the executive level and a culture of innovation is prevalent along with, increasing revenue, improving customer experience and growing operating margins

“Some larger firms are developing open source toolkits so that engineers with an interest in the technological aspects of the design process can lead the way,” says Ashley Kacha, Senior Engineer at the Institution of Structural Engineers (IStructE). “We’re also seeing a move towards building in-house software solutions for engineering problems, which isn’t something that has been done on a wide scale before.”

Emerging Technology Challenges

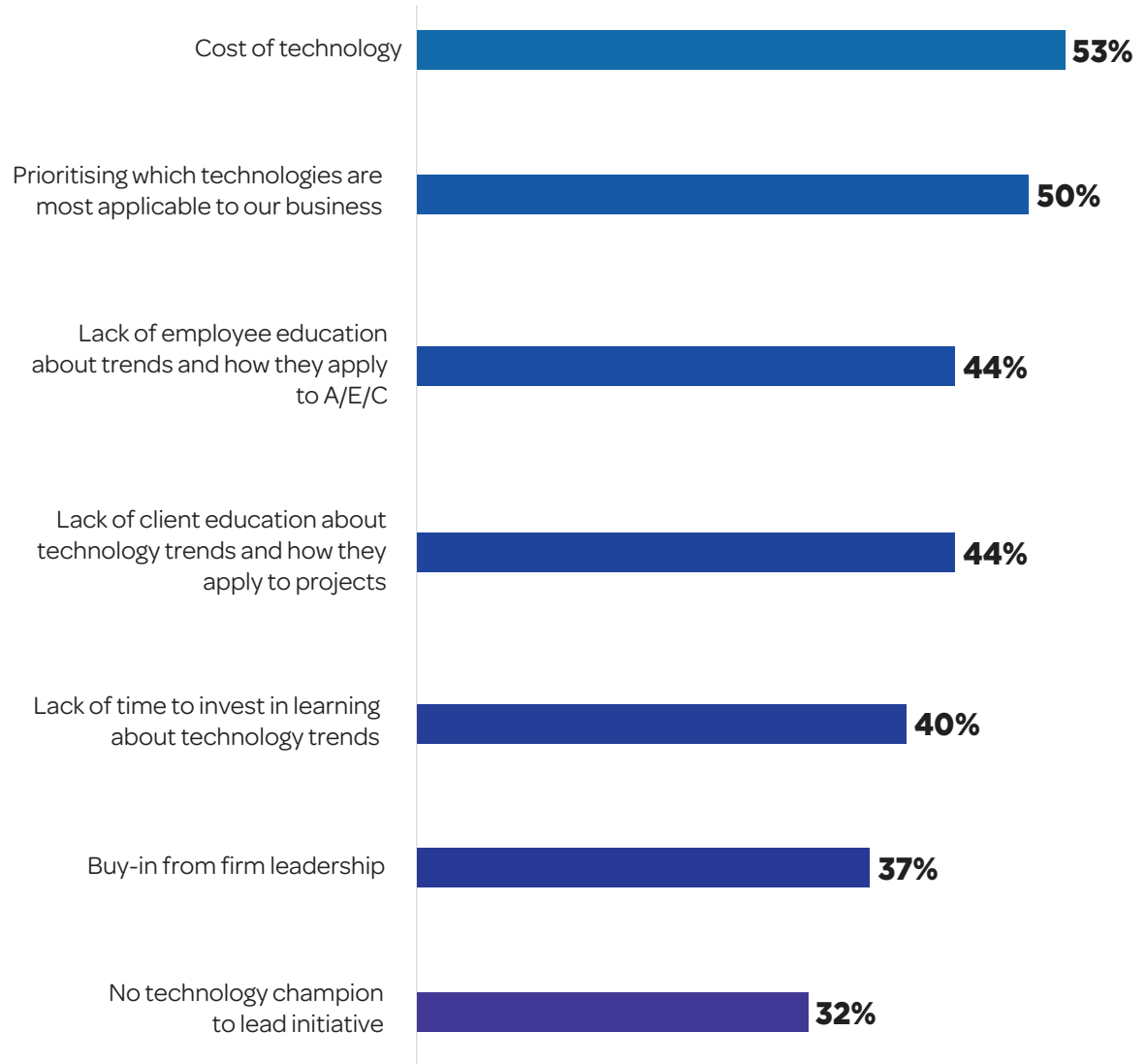
For some, a lack of skills could be holding back their digital ambitions. More than four in 10 firms say that a lack of employee education, a lack of client education and a lack of personal education is delaying technology adoption. But innovative firms – and those with enough resources – are finding solutions.

The changed expectations for the next five years could also be reflective of firms diverging more in their views of where they 'should' be and what their best path forward is.

“To transform suggests that there’s a beginning, middle and an end, which I think increasingly people are seeing as not the case,” says Adrian Malleson, Head of Economic Research and Analysis at RIBA. “It’s an ongoing process, essentially adapting to and engaging with new tools.”

Priorities may be pivoting in the wake of the pandemic as firms switch from survival mode to more strategic planning for the future. The broad range of responses to the question of how technology adoption challenges will be addressed in the next three years certainly indicates a spectrum of strategy and ambition – though in-house education is a priority.

Top Emerging Technology Challenges in the Next 3 Years



Technology Empowers Feedback

The perceived importance of emerging technologies has soared year-on-year, which reflects the industry's investment in hybrid and remote working. Data visualisation technologies, for instance, were ranked lowest in importance last year, with 58% of firms identifying it as one of their top challenges. But that increased to 76% of firms this year. Data science and big data are the most used emerging technologies across every function.

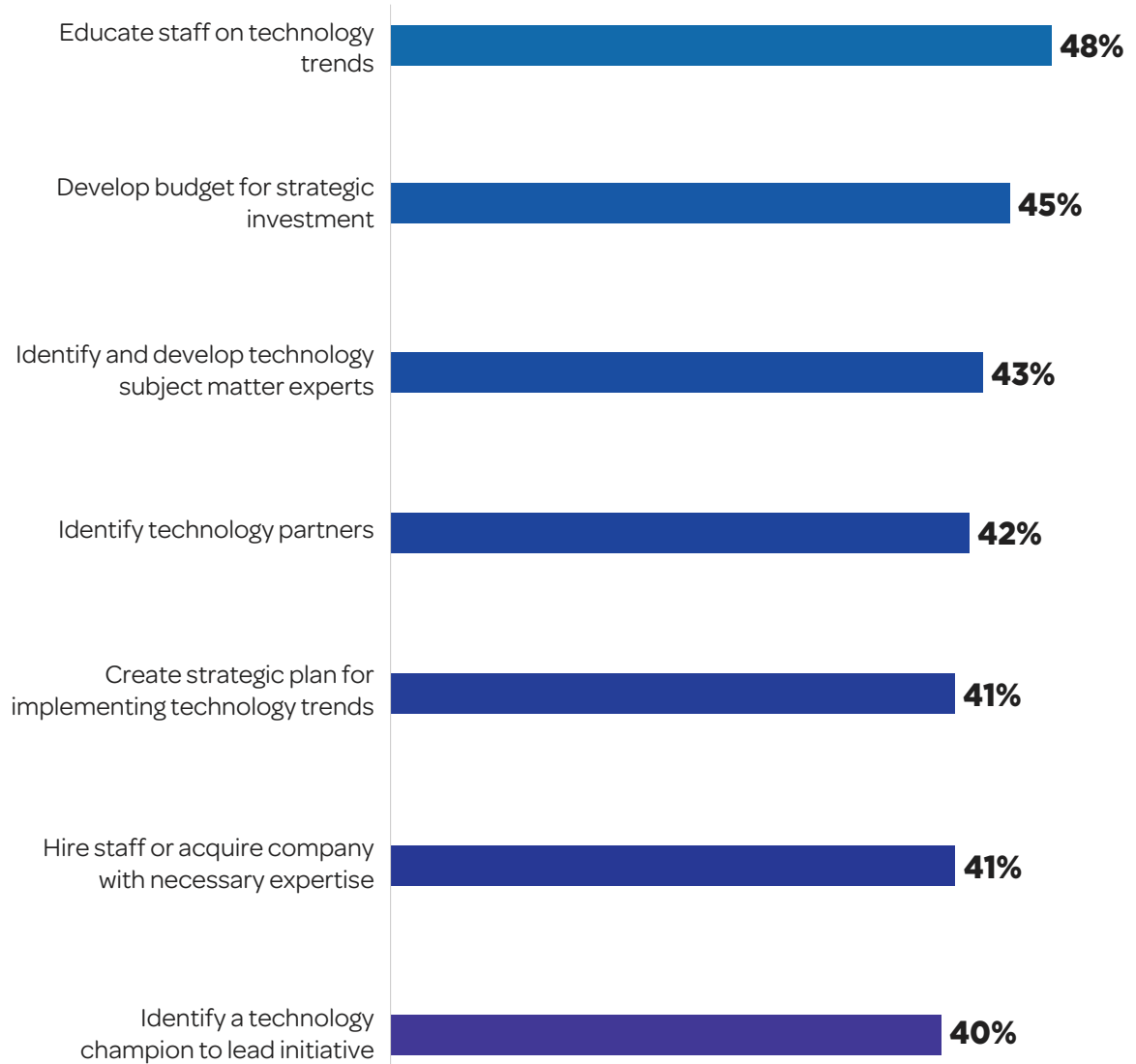
Four out of five firms say that investing in technology to improve operations will help them win more business. As firms look for better ways to leverage technology, there is no clear answer for how firms will go about doing this.

Nearly half of firms plan to focus on educating staff on the emerging technology trends. Firms are also putting a higher emphasis on creating a budget and developing subject matter experts.

Many firms are driving these forward based on client requests and project demands. It is now much more viable to show a work-in-progress using a 3D visualization, for example, as Matthew Tence, Business Manager at Silver Thomas Hanley (STH), explains.

"In March 2020 we had 25% of our projects in BIM 360," he says. "We quickly realized we needed all our projects in a fully collaborative space. Now, we're presenting, we're sharing, we're editing, we're connecting the model in the cloud. And modern 3D capabilities make it much quicker and easier for clients to articulate their feedback or staff to collaborate across the various locations in Australia."

Top Emerging Technology Trend Initiatives

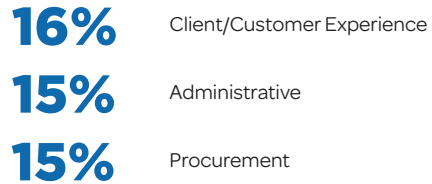


Applying Technology to the Business

As firms put more initiatives in place, a technology applications gap is emerging: only about half of firms expect to be using any of these technologies in three years' time.

Automation is also changing the day-to-day management of workloads and projects, with reliance on spreadsheets falling across every function year-on-year. The greatest progress was in administration, with only 15% of firms reporting complete reliance, compared to 25% last year. The next biggest drops were in customer experience – where complete reliance dropped from 24% to 16% – and in procurement, where it dropped from 23% to 15%

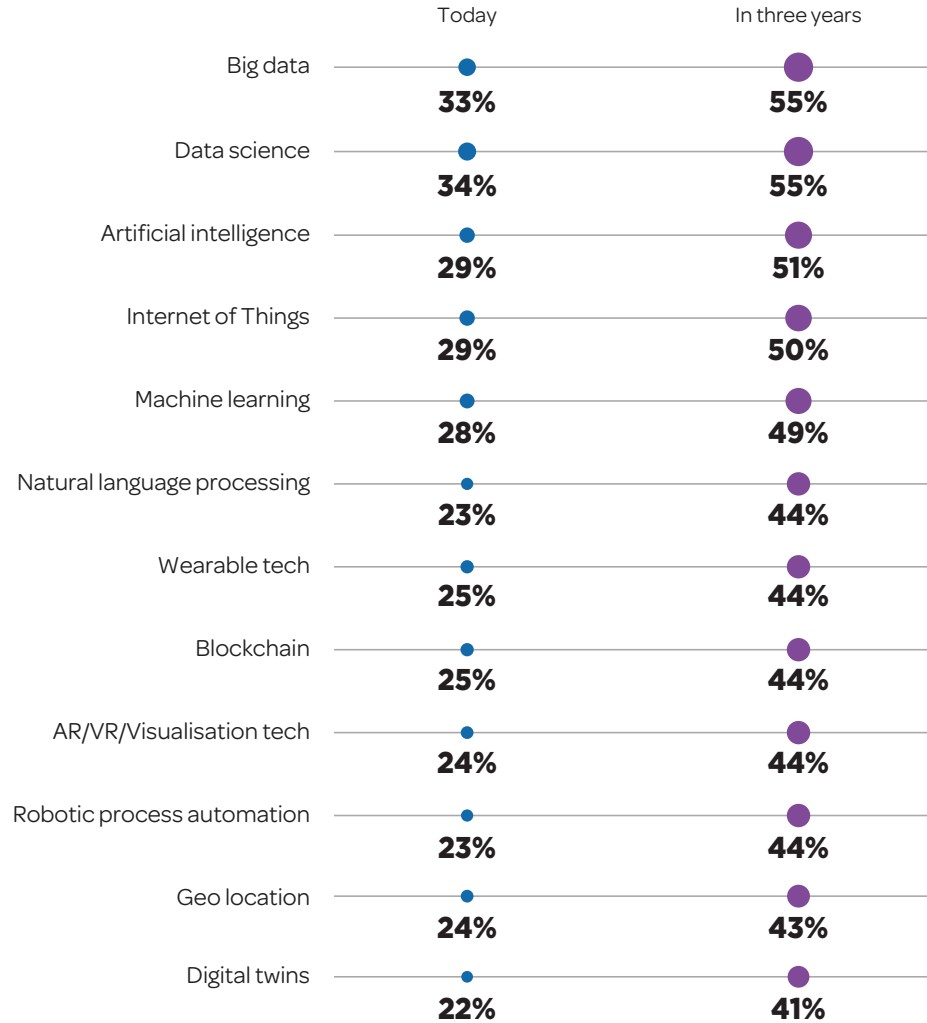
2021



2022



Application of Technology Trends Across the Business



SECTION TWO

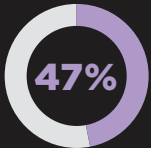
Project Management

Firms face a series of interlinked challenges in the project management function.

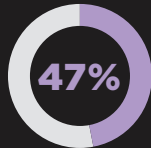
They are gaining confidence through the tracking of more KPIs, and achieving a more accurate outlook on project timings as a result.

They are focused on building up the skills in their teams, while recognising that the talent they already have is their greatest asset.

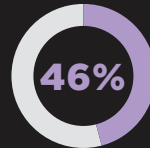
Top three project management challenges in the next five years



Increased competition for talent



Adoption of artificial intelligence



Developing the right knowledge and skills



KEY DATA POINTS FROM THE SURVEY

1 Upskill and increase the numbers. Firms predict the best ways for them to address challenges in the coming year are hiring more qualified staff (33%), investing in better software tools (32%) and increasing staff headcount (31%).

2 KPIs give confidence. Significantly more firms are tracking a range of KPIs compared with last year. Confidence in overall project performance has risen from 59% to 65% this year.

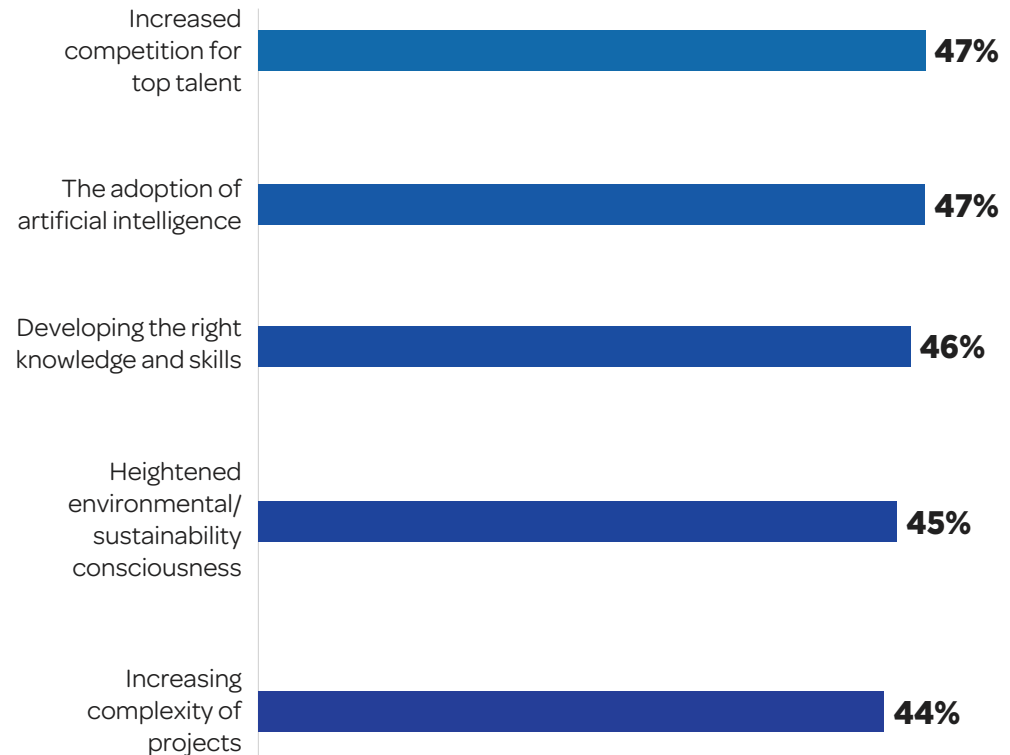
3 People power. The top project management strengths are named as qualified project managers (37%) and collaboration and communication (36%)

Complex Challenges for Project Management

Project management teams are struggling to navigate today's complex landscape. Talent acquisition, artificial intelligence adoption, skills development, corporate social responsibility demands, and project complexity are interlinked challenges that will require a layered strategic approach to overcome.

When it comes to managing project information, it is administrative workload that stands out as the leading challenge. This is likely to be a result of more companies moving through digital transformation. While certainly a positive step, this means more project management information to manage digitally, which requires a fresh look at processes and tools.

Top Project Management Challenges



Addressing Project Management Challenges

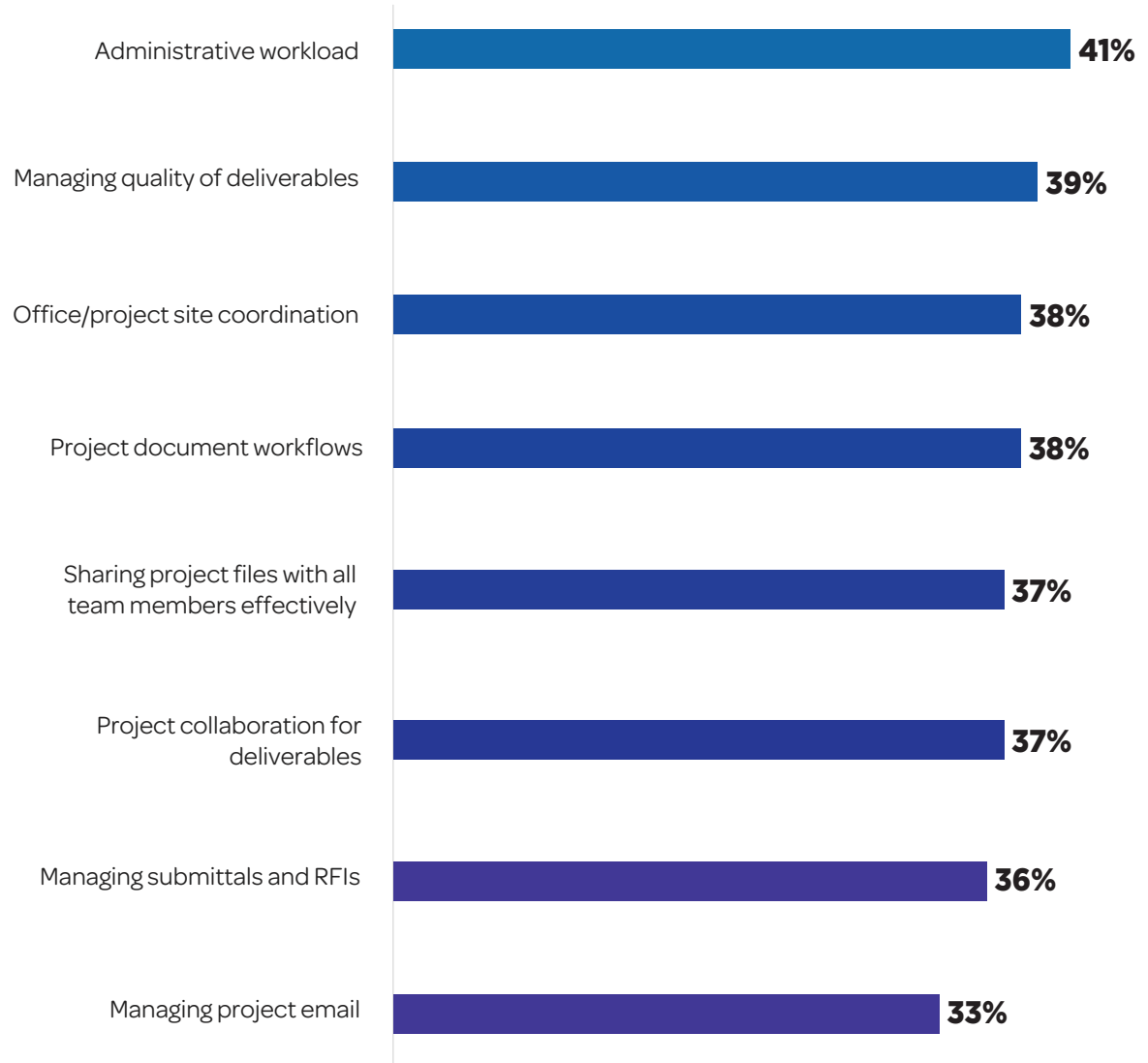
Qualified project managers are seen by firms as their top project management strength, yet competition for talent is named as the top challenge. So while firms value the talent they do have, they also know they need more.

Skills gaps have also been created by a mismatch between entry routes into the industry and the expertise now required. Ashley Kacha, Senior Engineer at the Institution of Structural Engineers (IStructE) says that training for engineers has not been updated to keep up with the level of technical skills needed.

“The pipeline for engineers is very linear,” he explains. Engineering courses are very dense, very much focused on the engineering theory, very much focused on the technical aspects of building and designing things. And at the moment there is no scope to fit in more, for example, computer science-related issues.”

Collaboration and communication are named as the second biggest strength, but managing competing priorities across business functions is the second biggest challenge that project managers face. Firms know which areas of their businesses are crucial to their success, and they know they must keep investing in them to remain successful.

Top Project Information Management Challenges





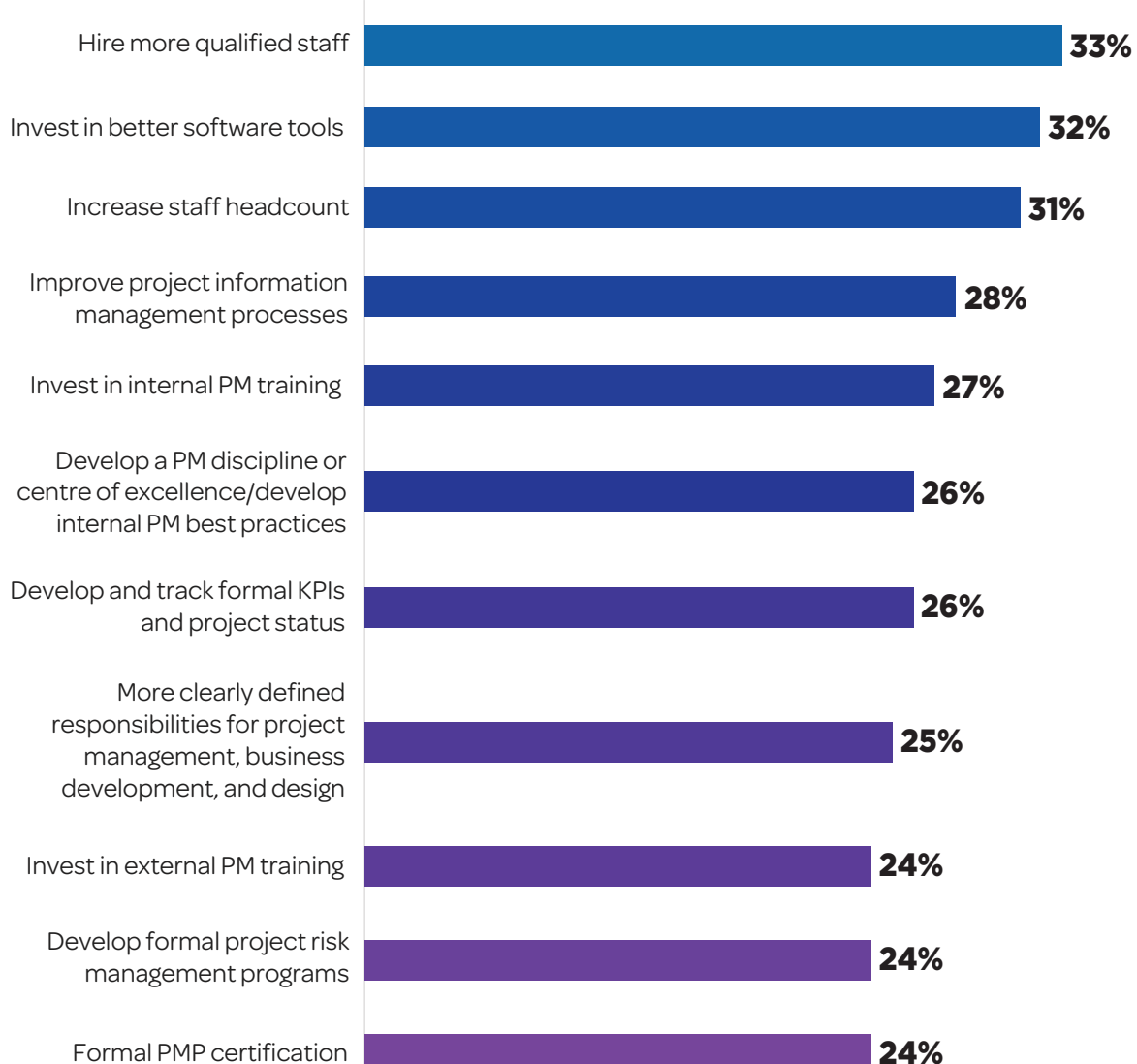
Top three project management strengths:

37% Qualified project managers

36% Collaboration and communication

35% Having the right software tools

Top Project Management Initiatives in Next 3 Years



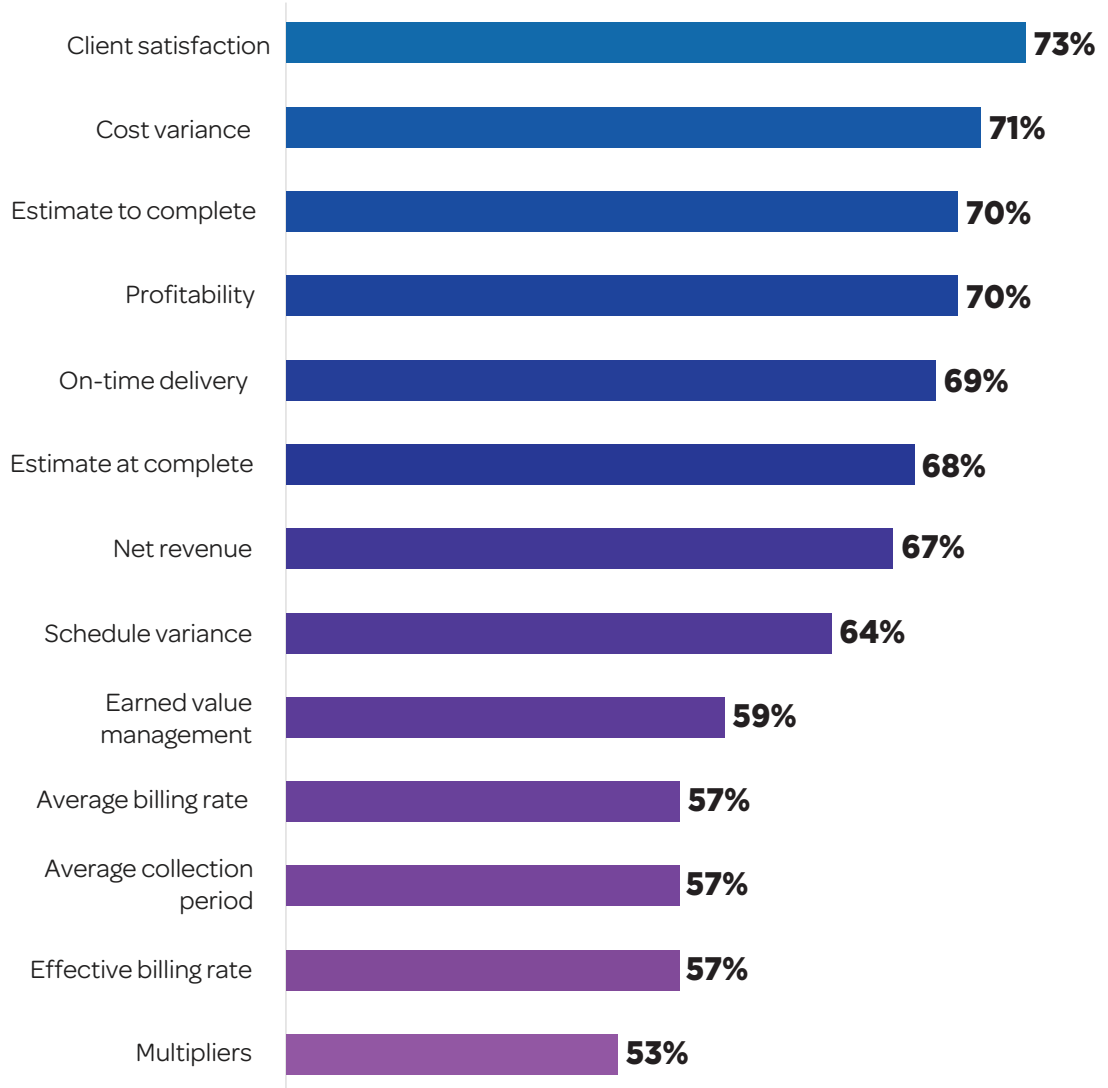
Confidence from KPIs

Firms are measuring their progress more effectively than they did last year, and this increased insight is paying off. Significantly more companies are tracking a range of KPIs, and confidence in reporting project performance seems to have risen in tandem. Firms report the highest confidence in overall project performance, at 65% - up from 59% last year. The biggest rise is in confidence in reporting on actual project cost (up from 52% to 65%).

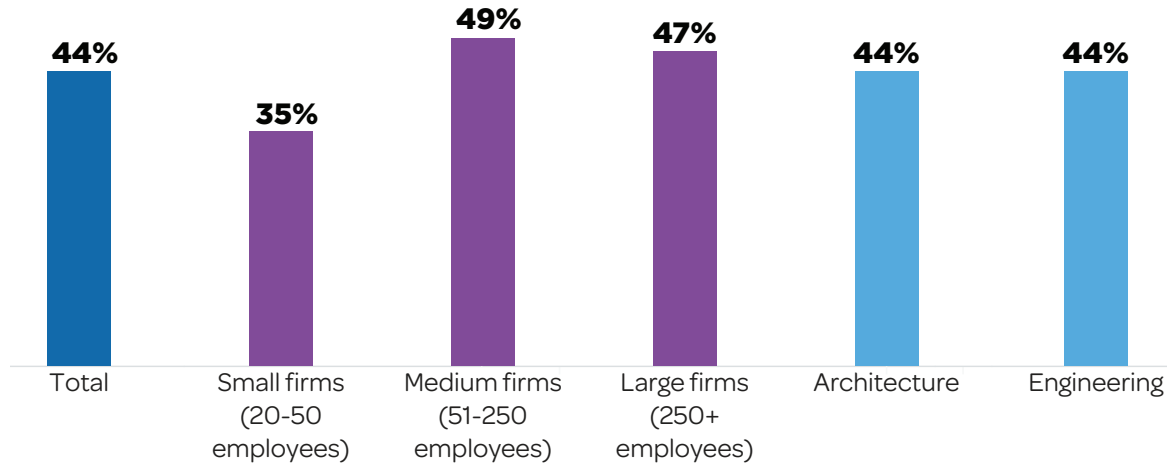
73% The most tracked KPI this year is client satisfaction
Last year, 68% tracked this

71% The second most-tracked KPI is cost variance
Last year, 61% tracked this

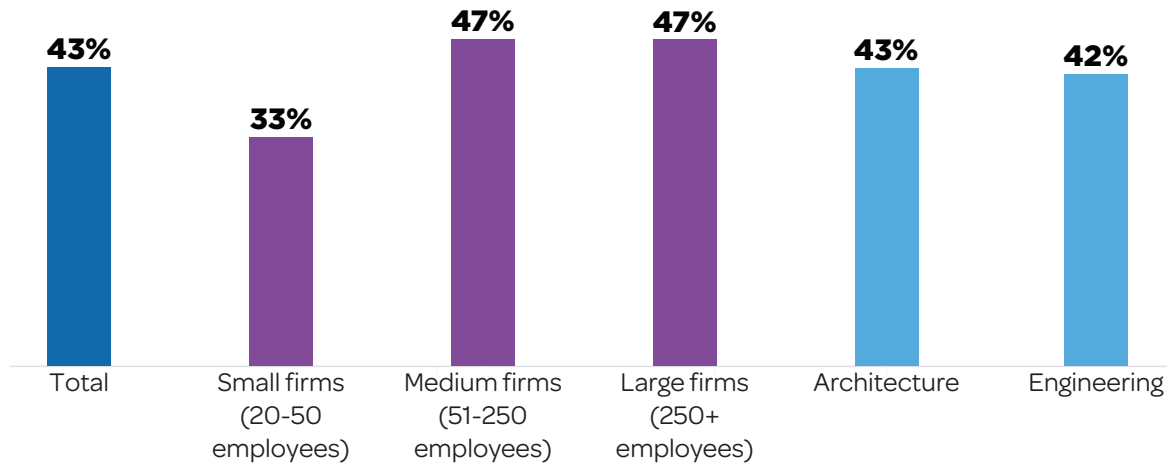
Project Management KPIs Tracked



Projects On or Ahead of Schedule



Projects On or Under Budget



The number of projects on or ahead of schedule has also improved year-on-year - up from 39% to 44% - though there is still more to do here. Meanwhile, the number of projects on or under budget has remained static at 43%, so firms need to invest more in keeping track of spending.

Human Capital Management

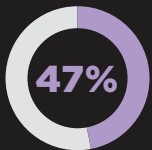


'The Great Resignation' is being felt across every industry, and the architecture and engineering industry is no exception.

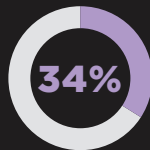
Now is the time for firms to assess their talent strategies and ensure they are putting themselves in the best position to keep the people they have and attract the people they need to future-proof their businesses.



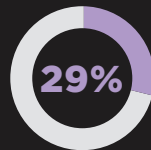
Finding and retaining talent will create major challenges across the organisation



47% of firms name increased competition for talent as a leading challenge for project management in the next five years



34% say finding IT talent is a top challenge for IT operations today



29% say finding and retaining qualified staff is a top challenge for finance functions today

KEY DATA POINTS FROM THE SURVEY

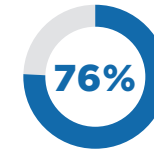
1 Managing the talent exodus. All functions have talent concerns, and their focus is predominantly on increasing headcount. Two of the top three initiatives for addressing project management challenges focus on recruitment: hire more qualified staff (33%) and increase staff headcount (31%).

2 Need for technical skills and knowledge. Four in 10 (or more) firms say that a lack of employee education, client education and personal education is delaying technology adoption.

3 Strategy change-up. Firms may need to rethink their talent strategies: less than one in four intend to address project management talent shortages with external training, for example (24%), and only 27% plan to address them with internal training.

Talent Needs Investment

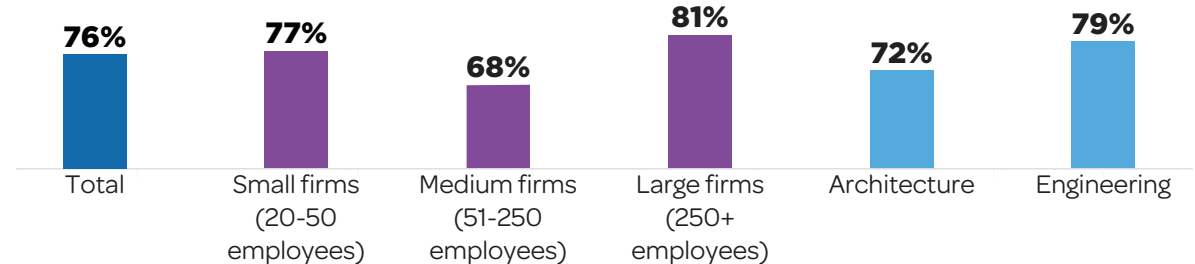
Great people are an essential to growth, and talent concerns are being felt by all functions. Two of the top three initiatives for addressing project management challenges focus on recruitment, for example – hire more qualified staff (33%) and increase staff headcount (31%). Last year, increasing headcount didn't make the top three, so these problems are growing. And finding top IT talent is also named as one of the top challenges in IT operations.



Most firms have significantly more initiatives to support employee wellbeing than they did two years ago

Firms recognize that employee wellbeing is a crucial part of retention and engagement – 76% either agree or strongly agree that they have a significantly higher number of initiatives to support employee wellbeing than two years ago.

Firms with More Employee Wellbeing Initiatives than Two Years Ago



However, investment in other areas of human capital management is mixed. Only one in four financial leaders indicated their firm plans to increase spending on talent acquisition and retention over the next three years, for example. Internal training may be seen as costly and time-consuming – but failing to retain experienced staff could leave firms vulnerable.

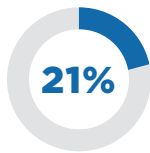
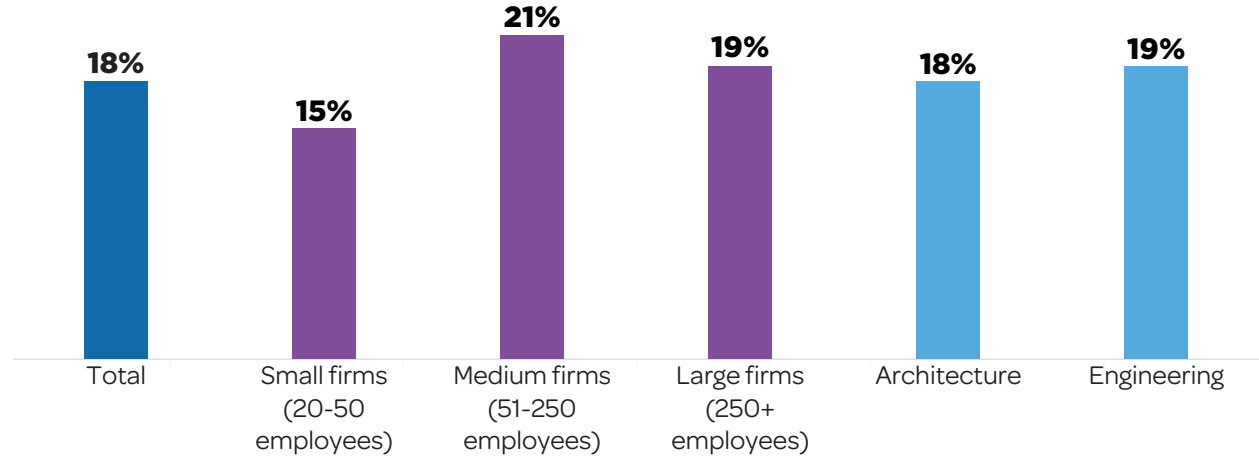
New Skills Mean New Gaps

The pandemic has also caused some changes in what firms prioritise in their people, which may impact internal movement as well as recruitment. Hybrid working has exposed gaps or weaknesses that companies may not previously have noticed or been concerned by.

“Due to the way in which we’re working, you need people who are very versatile,” says STH’s Matthew Tence. “People who are very narrow got found out during the pandemic because roles have required a level of independence and experience. Now we’re really trying to make sure we’re getting the right people into the right situations and the right roles.”

The overall average turnover rate is not surprisingly higher than previous years, but medium-sized companies seem to be seeing the highest turnover. The average turnover rate is 18% while medium firms are seeing a 21% turnover rate. Small companies are faring a bit better with 15% turnover, but that is still higher than a standard attrition rate.

Average Employee Turnover



average turnover rate for medium-sized firms

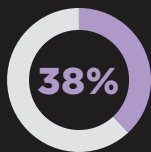
Business Development

Competition is fiercer than ever, and firms must be more deliberate and strategic to differentiate from other firms.

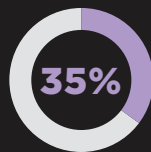
Hybrid working is creating new opportunities to gain international clients, but it also increases the number of firms pursuing each project.

Initiatives to address the challenges vary depending on company size.

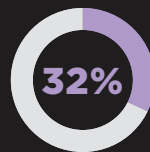
Top three business development challenges in the next three years



Increased competition



Increased cost of competing for projects



Identifying new prospects



KEY DATA POINTS FROM THE SURVEY

1 Cost of competition. Increased competition is named as the top business development challenge (38%), followed by increased cost of competing for projects (35%).

2 Tech differentiates. 59% say they have lost potential business to competitors with more advanced technologies.

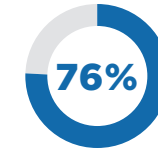
3 Geographic expansion. This was named the top initiative for business development in the next three years.

The competitive landscape remains firms' top challenge, but their issues vary depending on the size of the company. Small firms are less concerned about increased competition, but are the most challenged by administrative time maintaining reports and records. Large firms are the most challenged by coordinating business development teams and operations teams, while medium firms struggle the most to find time to nurture client relationships.

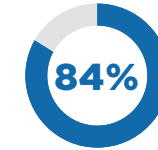
Expanding geographically is a priority for firms of all sizes. Many report that hybrid working gives them opportunities to partner internationally and enter new global markets: 76% say they are better positioned to break into new markets or segments than they were 12 months ago.

"If you're working with a team outside of London who are remote anyway, there's no reason why you can't work with one that's in the south of France, or anywhere else," says Ashley Kacha, Senior Engineer at the Institution of Structural Engineers (IStructE).

Remote working is opening up new opportunities, but firms are not discounting face-to-face contact altogether. The higher Asia Pacific figure, for instance, is likely to be a result of the region's previously tight travel restrictions starting to ease, which shows that there is still value in physical presence – particularly with new clients.



of firms agree that they are better positioned to break into new markets or segments than they were 12 months ago

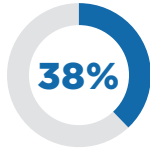


of Asia Pacific firms agree that they are better positioned to break into new markets or segments than they were 12 months ago

“We’re seeing some change now,” says Matthew Tence, Business Manager at Australian architecture practice Silver Thomas Hanley (STH). “But it’s very hard to grow any new connections and new clients internationally if you can’t get in front of them to impress them.”

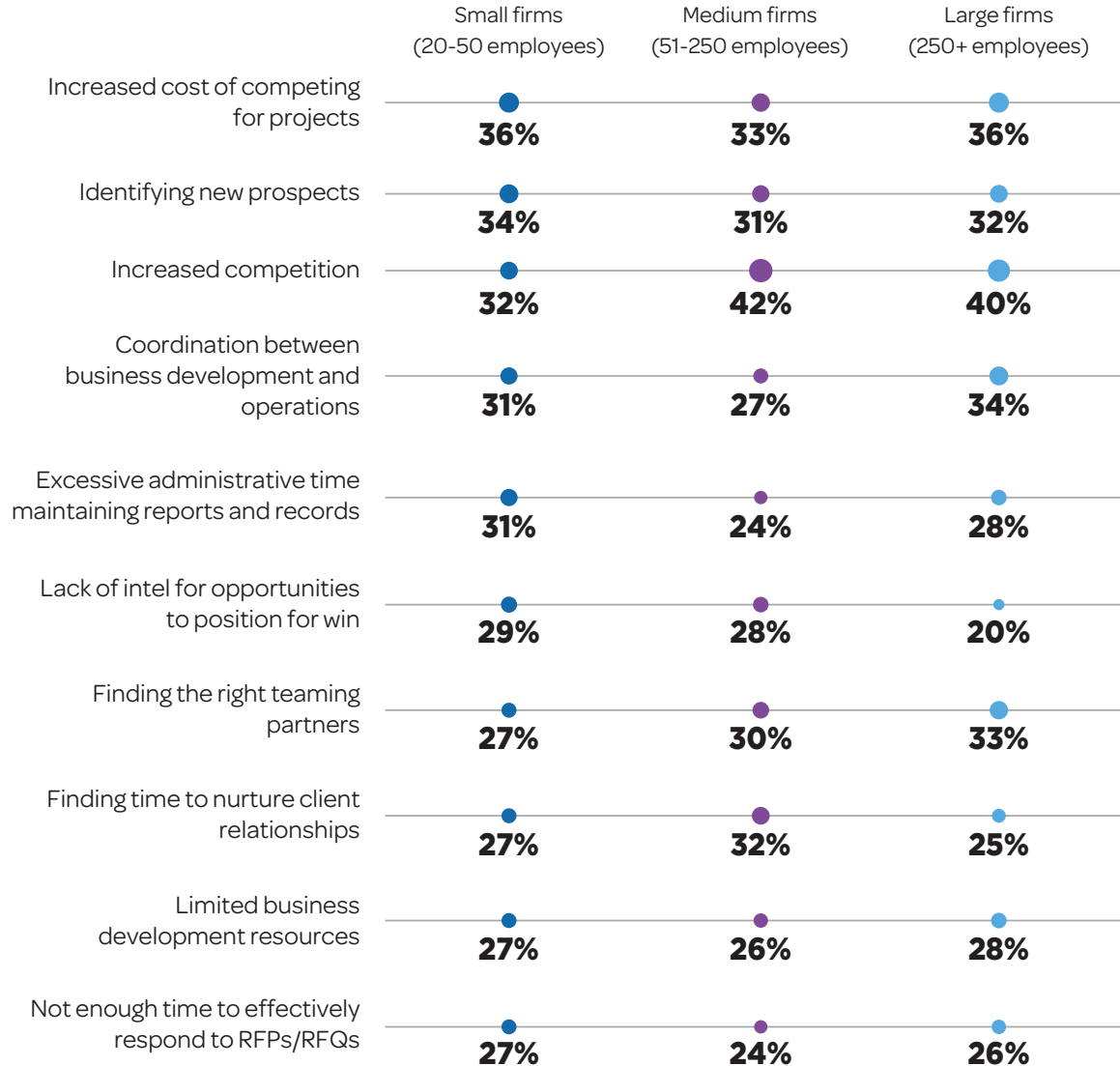
Ambitions Go Global

The competitive landscape remains firms' top challenge, but their issues vary depending on the size of the company. Small firms are less concerned about increased competition, but are the most challenged by administrative time maintaining reports and records. Large firms are the most challenged by coordinating business development teams and operations teams, while medium firms struggle the most to find time to nurture client relationships.



of firms say an increase in competition is their biggest business development challenge

Top Business Development Challenges

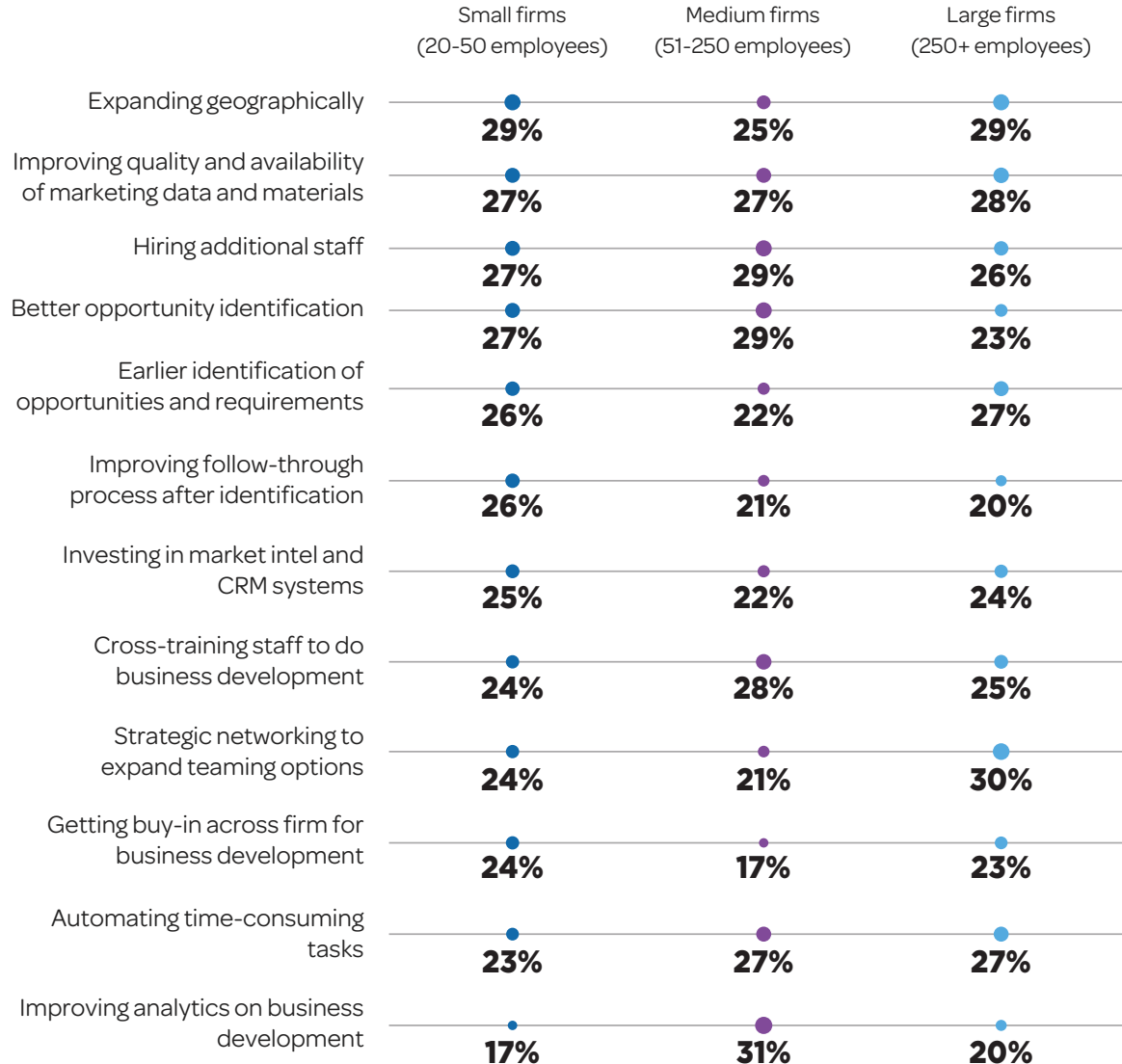


A Varied Response to Challenges

The mixed response to the question of how firms will address business development challenges in the next three years suggests that there is uncertainty in the industry. Again, however, there are some clear differences depending on size.

For example, medium firms are the most likely to look at improving analytics on business development, while large firms are focusing the most on strategic networking. Small firms are the most focused on improving their follow-through process after identifying an opportunity.

Top Business Development Initiatives



Financial Management

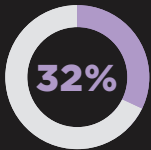


A broad variety of strategies emerge as firms navigate a complex financial landscape.

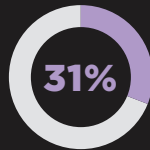
Companies must strike a balance between future investment and controlling their costs: process improvements are a primary focus.



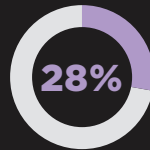
Top three initiatives to address financial management challenges in the next three years



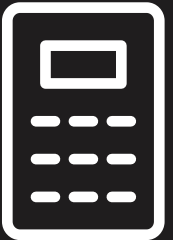
Better managing growth



Business process improvement



Streamlining billing processes



KEY DATA POINTS FROM THE SURVEY

1 Growing pains. The top initiative to address challenges in the next three years is to improve growth management (32%), but managing growth is rated the second-highest finance challenge (36%).

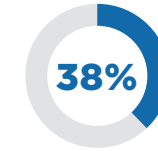
2 Counting the cost. Better control of costs is named as the most likely factor in increasing profitability (33%), with limiting project cost overruns in second place (31%).

3 Profit watch. The KPIs firms are most likely to be tracking are net revenue (77%), operating profit (73%) and project profitability (71%).

Internal Challenges Are Likely to Grow

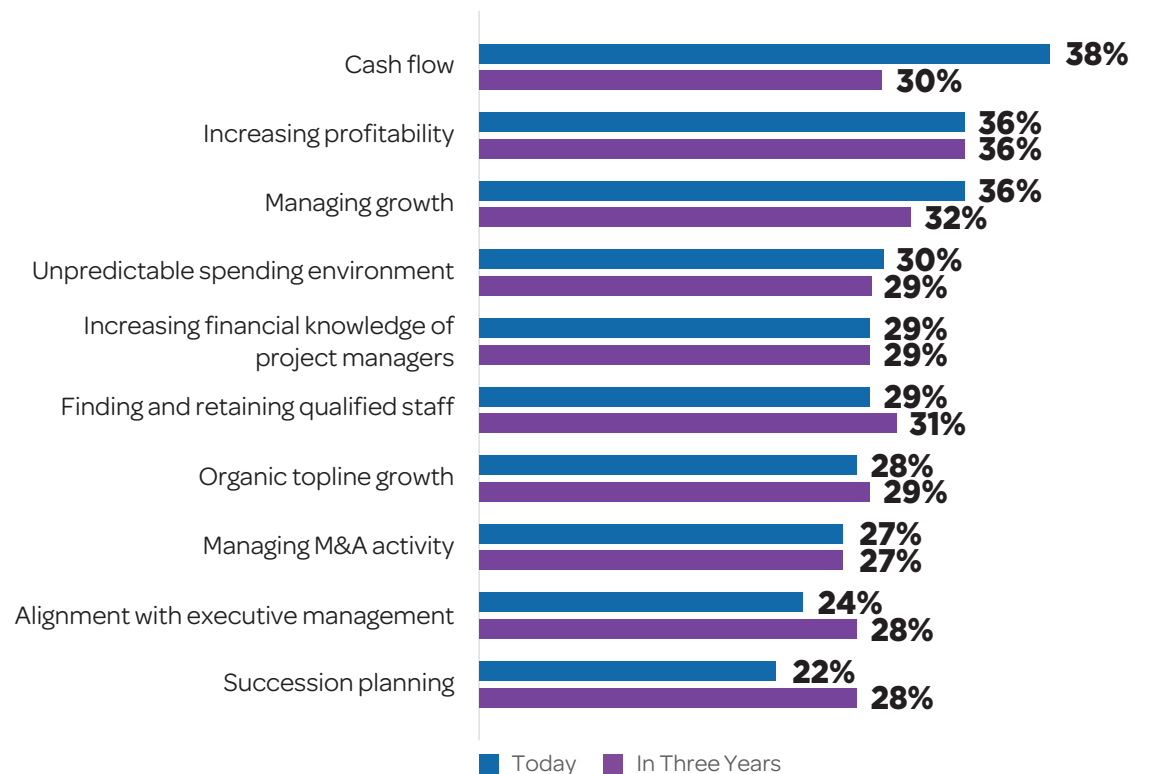
Just as with every other function, talent concerns are central and internal people challenges are set to rise up the agenda.

Our survey shows cash flow and managing growth are expected to become less of an issue in the next three years, while talent shortages, leadership alignment and the management pipeline are expected to see the biggest jumps in terms of challenges. These issues will require firms to focus on retention and creating clear career pathways for employees.

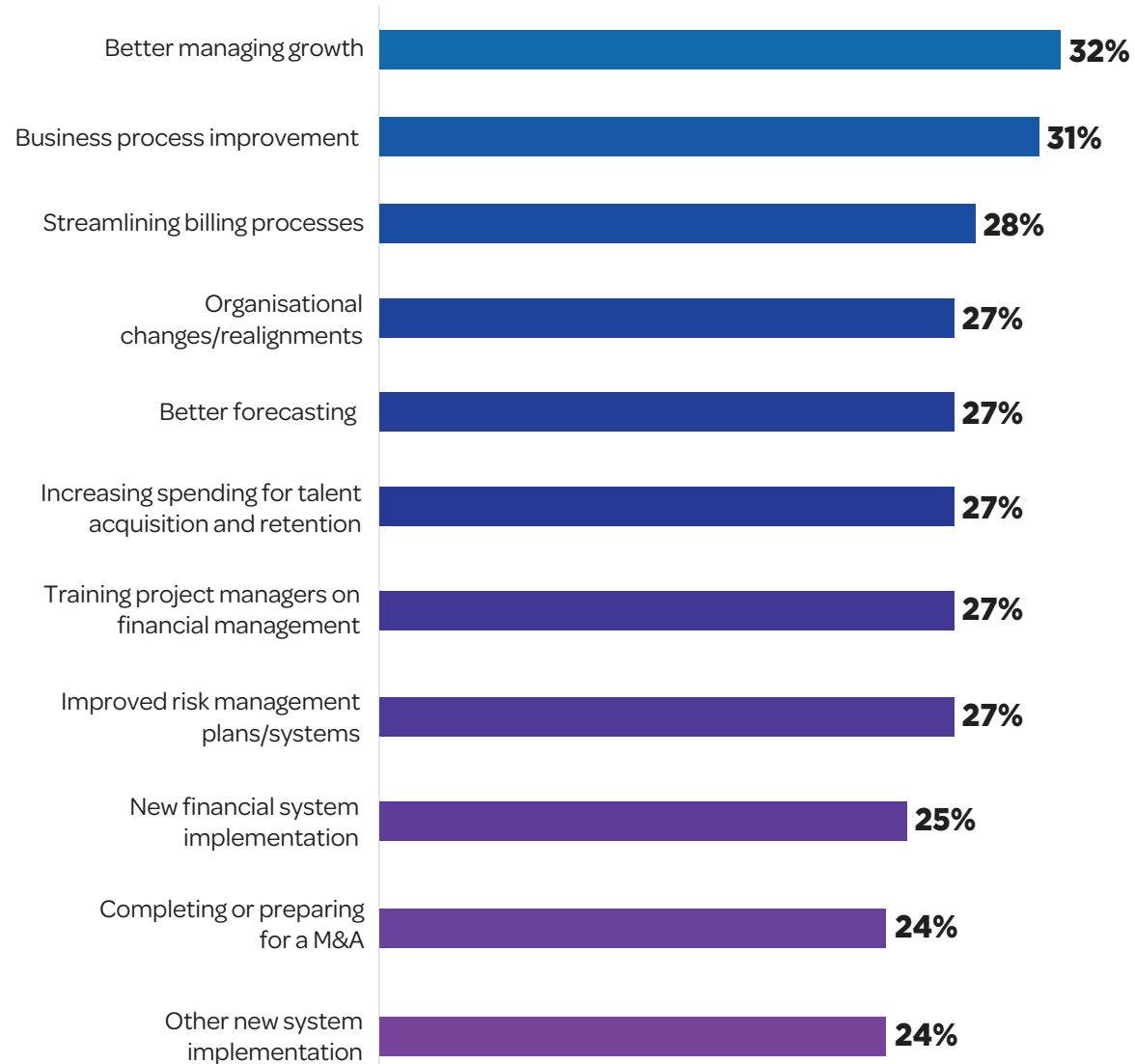


Cash flow
Top financial management challenge

Top Financial Management Challenges



Top Financial Management Initiatives

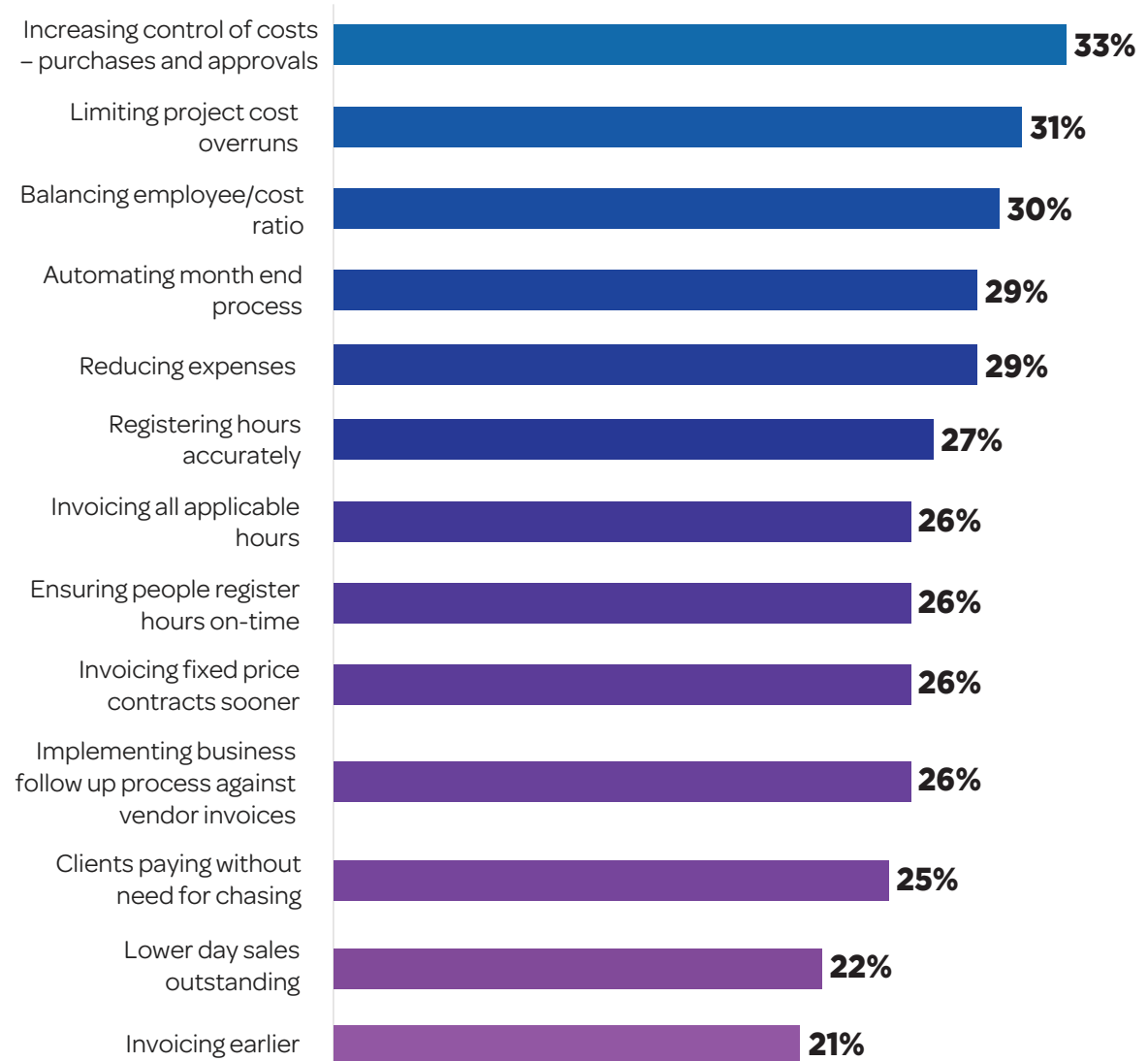


A Complex Climate Divides Opinion

When it comes to the best initiatives to address financial challenges in the next three years, there is little consensus. Medium firms are the most focused on limiting project cost overruns, and on ensuring clients pay without the need for chasing. And encouraging people register their hours on time is most likely to be a priority for small firms, while large firms are most likely to be prioritising invoicing fixed price contracts sooner.

Invoicing earlier is seen as the least likely way to increase profitability, yet cash flow is named as the top financial challenge. Firms should focus on efficiency internally and know where to proactively reach out, but understand that not all of it is within the control of the business.

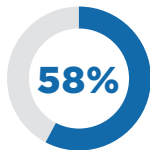
Top Ways to Increase Firm Profitability



Are Firms Tracking the Right KPIs?

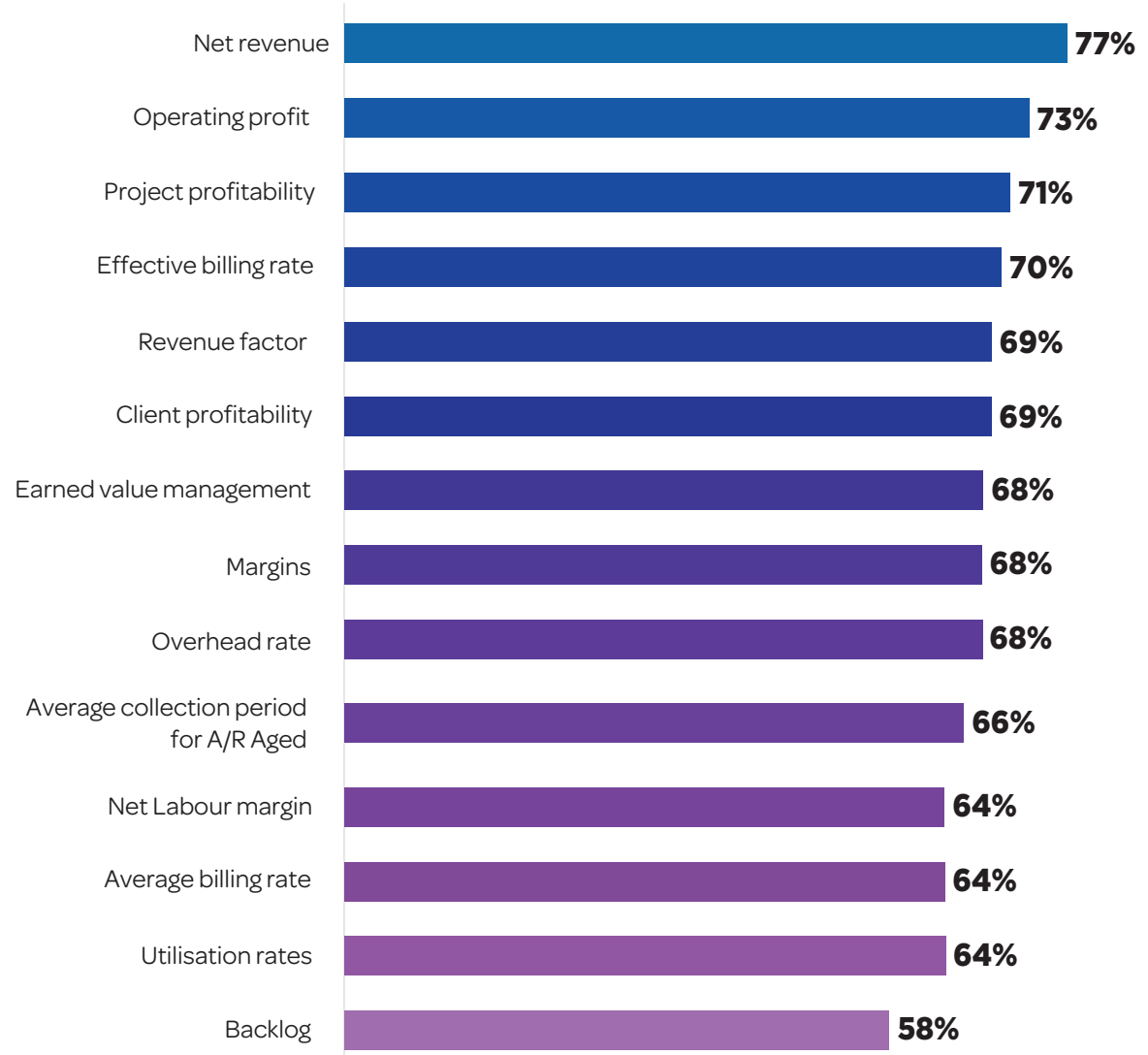
The KPIs firms are most likely to be tracking are net revenue, at 77%, and operating profit, at 73%. They are least likely to be tracking their backlog (58%). Again, firms could be overlooking for easy wins here by not focusing enough on their future earnings – and this data suggests that there is still room for more KPIs to be tracked across the board.

Claire Smith, Editor at UK magazine New Civil Engineer, explains that not tracking enough KPIs can lead to “project memory loss” – especially in the current climate of the ‘Great Resignation’ and higher employee churn. “It means a project is not as efficient because you have to ask all these questions again,” she says. “And sometimes you’ll make the same mistakes that somebody else has already made. But you don’t know that because it wasn’t recorded.”



Proportion of firms tracking backlog as a KPI

Financial Management KPIs Tracked

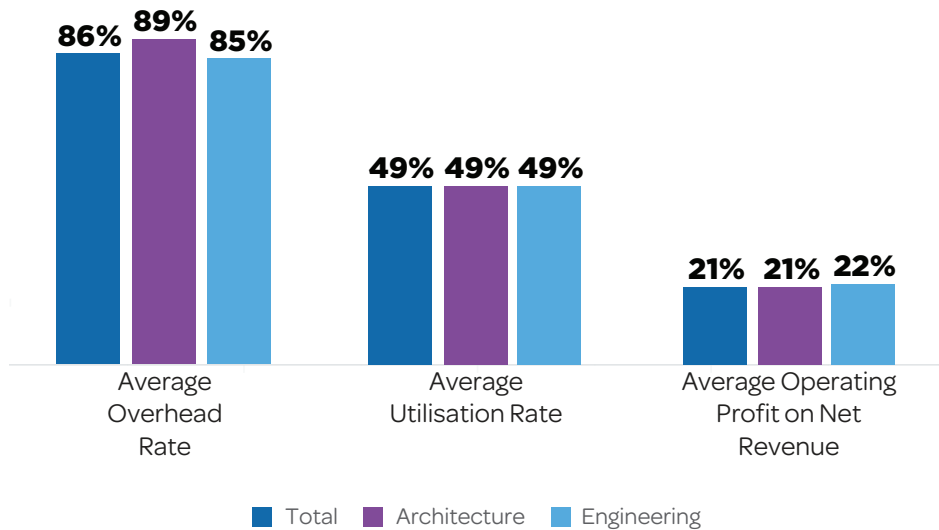


Financial Benchmarking Highlights Variations

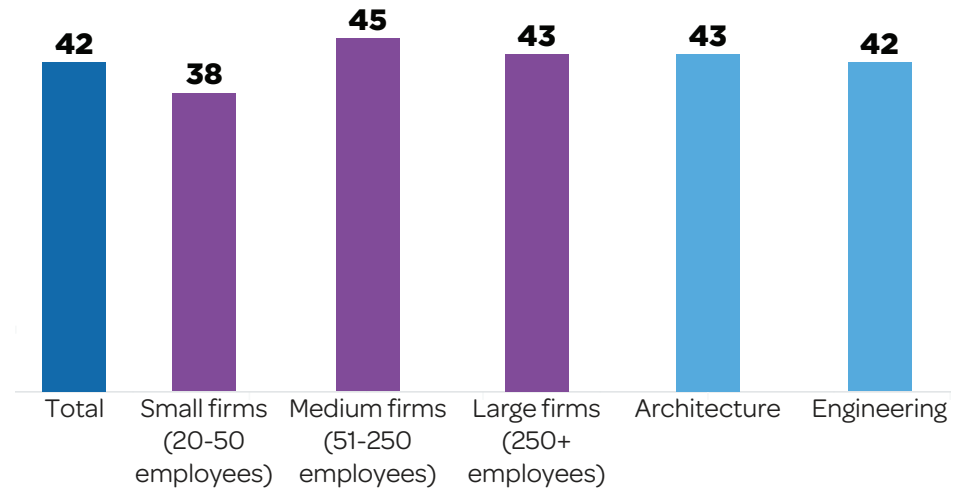
The average overhead rate for medium-sized companies is high, at 95%, compared with just 75% for small companies. And medium-sized companies also take longer to invoice than all other company sizes, with an average of 45 days to issue invoices following project completion, and an average of 43 days to collect payment.

When it comes to utilization, small companies are behind at 43% - with large companies reporting 52% and medium firms 50%.

Organisations Performance Over the Past 12 Months



Collection Period in Days from Project Completion to Invoicing



CONCLUSION



A&E firms have many common concerns this year, but there are fewer common solutions. Following a unified push towards recovery, firms seem to be re-evaluating their priorities and direction – particularly in the areas of business development and financial management.

Talent shortages are a concern industry-wide, and issues are flagged at every stage – from training to management succession-planning. This is certainly not unique to architecture and engineering, but there are signs that firms are not being strategic or holistic enough in their approach to filling talent gaps.

Digital maturity continues to be an important goal, but firms are becoming less confident about reaching it as they assess what is possible and where is smartest to invest. It is clear to all, however, that digital knowledge and skills will be essential as firms compete for more complex projects in a crowded market.

Against these challenges, corporate social responsibility must be a priority. Firms must invest in proving their sustainability credentials to win new business and future-proof their success.

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