



Press release

Digital mobility in German cities: Hamburg, Stuttgart and Berlin lead the pack

PwC and DLR examined digitalisation of mobility and e-mobility in Germany's 25 largest cities / Hamburg in first place overall thanks to its "Transport 4.0" project / Stuttgart offers tight network of charging stations and Berlin scores top marks in several categories / Individual rankings for infrastructure, sharing, e-mobility and public transport / PwC expert Hasse: "Germany lagging behind its international competitors"

Düsseldorf, 29 May 2017 When it comes to digitalisation of mobility, Hamburg is Germany's most advanced city. This was one of the findings of the study conducted by auditing and consulting firm PwC, with assistance from the Institute of Transport Research at the German Aerospace Center (DLR). The 25 most-populated German cities were examined and ranked in terms of how far they have come with respect to digital mobility. Scoring 76.7 out of a possible 100 points, Hamburg took first place, with Stuttgart following at 71.9 points and Berlin at 67.1. Overall, there was a pronounced spread between the top and bottom scorers. For instance, the ten lowest-scoring cities were only awarded between 30.4 and 41.9 points.

Public transport requires greater digitalisation and innovation

"As far as carsharing, e-mobility, digital infrastructure and mobility apps are concerned, a lot has happened in Germany in recent years. However, this conclusion should not obscure the fact that internationally, we are still far behind – for example, compared to Amsterdam, where more than 5,000 electric cars are on the road and where there are more than 3,000 charging stations", said Felix Hasse, PwC partner and digitalisation expert. Particularly in cities with 250,000 to 500,000 inhabitants, the necessary infrastructure has usually not yet reached the state of the art, according to Hasse. "The main innovations thus far have not been brought about by the public transport companies and associations, but rather by startups and large



corporations. These usually focus first on the major metropolises."

Hamburg significantly ahead when it comes to digitalisation of infrastructure

A total of 29 individual indicators in four overarching categories were assessed. The experts awarded up to 25 points for each category, meaning that the cities could score up to 100. Hamburg scored particularly well in the category "digitalisation of infrastructure", receiving explicit praise from the experts for its "Transport 4.0" strategy for intelligent transport systems. Under this project, specialised sensors track all traffic in the area encompassing the Hamburg harbour and analyse it using innovative methods. Users can access current and forecasted data through their tablet or smartphone, and the risk of traffic jams is reduced.

Stuttgart takes the lead in e-mobility, Munich in sharing

Stuttgart has its positive performance in the "e-mobility" category to thank for its second-place finish in the overall ranking. In that category, the experts acknowledged not only the network of charging stations – which is relatively close-knit if you compare to other German Cities – but also that the users of e-cars are able to use an interactive online map to find the nearest charging station at any time. By contrast, while Berlin does not lead in any category it does appear near the top of the rankings in "digitalisation of infrastructure", "e-mobility" and "sharing". The top score in the "sharing" category went to Munich. The Bavarian capital scored big with its above-average ride-sharing and ride-selling services – inhabitants have not only CleverShuttle but also Uber at their disposal. The study also gave positive marks to smaller, neighbourhood-based initiatives. For instance, in the Münchner Freiheit area alone there are now five exclusive carsharing parking spaces.

"Leipzig mobil" app wins over the experts

Alongside Stuttgart, Leipzig offers proof that digital mobility is not the sole preserve of cities with over a million inhabitants. The Saxon metropolis took first place in the category "public transport". The city – population 560,000 – earned high marks with its user-friendly "Leipzig mobil" app, which provides real-time traffic and mobile payment information as well as offering users comprehensive, door-to-door mobility by integrating bike- and carsharing. In addition, subscribers of the "Leipzig mobil" package can use the city's comprehensive bike-



sharing services for ten hours each month free of charge.

Survey: digitalisation significantly influences German public transport

In addition to the ranking, more than 100 companies and public transport associations were surveyed on their degree of digitalisation and their subjective perception. Although public transport providers have identified digitalisation as a major influence, only few of them have drawn the right conclusions – merely one in three companies have a digitalisation strategy thus far. However, 45 per cent are planning one.

Autonomous driving: initial tests, but still no strategic anchoring

A conclusive analysis of autonomous driving revealed that although the cities have recognised the significance that autonomous driving has for urban development objectives, they have so far not taken any steps in that direction. According to Professor Dirk Heinrichs, head of the "Mobility and Urban Development" department at the DLR Institute of Transport Research, "The driving force behind autonomous driving in cities currently comes from the automotive manufacturers, IT companies and new mobility service providers. Autonomous driving can play a key role in public transport, urban commercial transport and waste management. Cities should definitely take advantage of these opportunities and develop autonomous driving as a component of their communal strategies."

Further information:

The study (in German) can be accessed at PwC Germany's website.

<https://www.pwc.de/mobilitaetsstudie2017>



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