# 2018 SMART CITY INDICATOR SURVEY | EMEA

**Johnson Controls**

Johnson Controls conducted its second annual smart city indicator survey to track key drivers, organizational barriers, technology trends, and the status of smart city solution implementations around the world. The survey queried over 330 city leaders in 20 countries, including almost 120 from France, Germany, Ireland, Italy, the Netherlands, South Africa, Spain, Switzerland, and the United Kingdom. Survey findings show that cities are increasingly looking to implement applications that will improve sustainability and the environment while creating



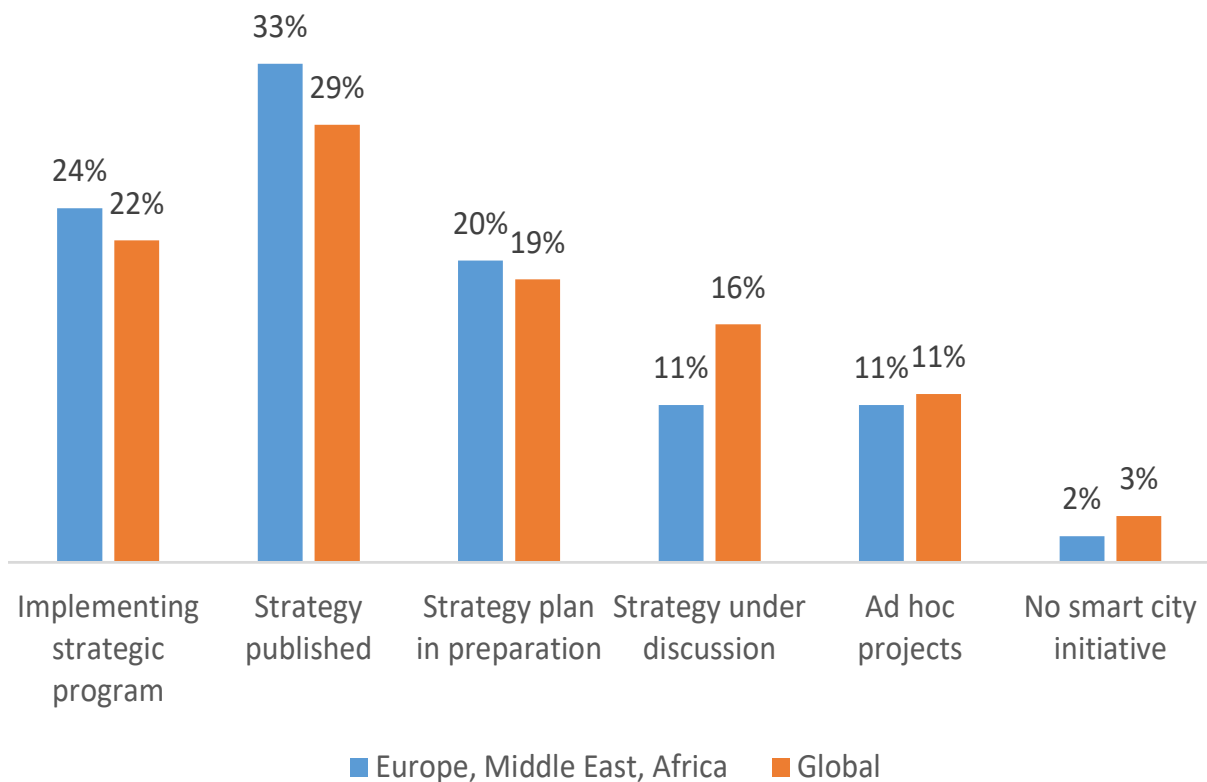## MOST CITIES ARE EARLY IN THE PROCESS OF IMPLEMENTING THEIR SMART CITY STRATEGY

### EMEA

**31%** of respondents indicated their strategy is either under discussion or in the preparation phase.

**33%** have published their smart city strategy and **24%** are implementing their strategic program.

### Global

Globally, **29%** of cities have published their smart city strategy and **22%** are in the implementation phase.



| | Implementing strategic program | Strategy published | Strategy plan in preparation | Strategy under discussion | Ad hoc projects | No smart city initiative |
|---|---|---|---|---|---|---|
| Europe, Middle East, Africa | 24% | 33% | 20% | 11% | 11% | 2% |
| Global | 22% | 29% | 19% | 16% | 11% | 3% |

■ Europe, Middle East, Africa   ■ Global

# 2018 Smart City Indicator Survey
## Europe, Middle East, Africa

For more information on the study, please visit **www.johnsoncontrols.com**

### TOP BARRIERS TO INVESTMENT

**18%** lack of proven business cases

**14%** lack of standards

**13%** availability of cost effective technology

The biggest barrier globally is lack of proven business cases.

### UNAVAILABILITY OF APPROPRIATE FINANCING OPTIONS

**37%** of respondents identify unavailability of appropriate financing options as the top financial barrier.
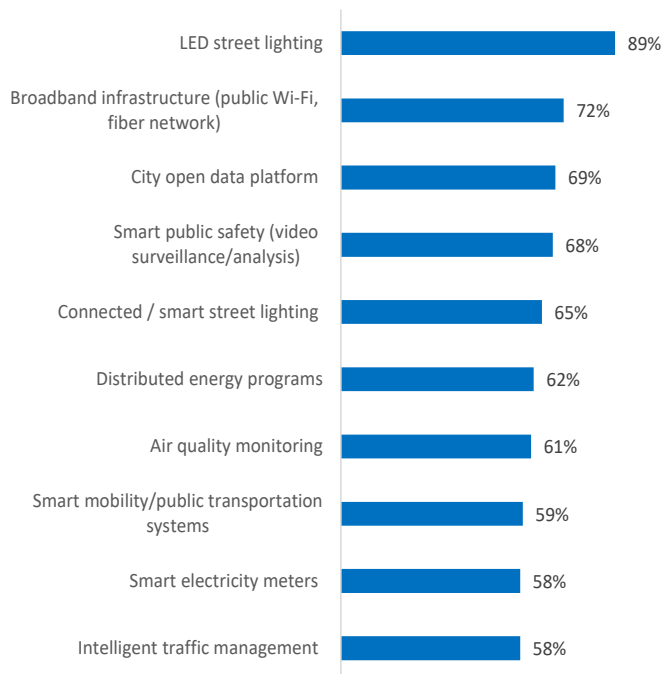
### METHODS FOR FINANCING SMART CITY PROJECTS

**48%** State / federal government funded

**39%** Public-private partnerships

**38%** City funded

**11%** Utility funded

**5%** User funded

**4%** Private sector funded

### TECHNOLOGY TRENDS EXPECTED TO HAVE IMPACT OVER THE NEXT FIVE YEARS

1. The Internet of Things (IoT)
2. Data analytics
3. Artificial intelligence / machine learning
4. Cybersecurity
5. Systems integration

## Smart City Application Implementation

| Application | % |
|---|---|
| LED street lighting | 89% |
| Broadband infrastructure (public Wi-Fi, fiber network) | 72% |
| City open data platform | 69% |
| Smart public safety (video surveillance/analysis) | 68% |
| Connected / smart street lighting | 65% |
| Distributed energy programs | 62% |
| Air quality monitoring | 61% |
| Smart mobility/public transportation systems | 59% |
| Smart electricity meters | 58% |
| Intelligent traffic management | 58% |

*Percentage of cities in the implementation phase by smart city application*

## 2018 Survey Demographics

To qualify, respondents must review or approve smart city initiatives in their municipality. The survey was administered anonymously by a third party research partner. For the 2018 survey, there was a representative mix of global respondents from medium to large cities.

Cities less than 500k — 15%

Cities greater than five million — 27%

Cities ranging in population from 500k to one million — 14%

Cities ranging in population from one million to five million — 44%

**Johnson Controls**