



# HAMBURG 2040

**HOW DO WE WANT TO LIVE IN THE FUTURE –  
AND WHAT WILL WE LIVE ON?**

*Guidelines for a economic development strategy*

## Foreword

At the beginning of the 2020s, Hamburg must again demonstrate the ability to deal with social and economic change it has developed over many centuries. Even before the COVID-19 crisis, these changes – especially those brought about by climate change, the digital revolution and shifts in the global economic architecture – were taking on an unprecedented force and momentum. However, the COVID-19 pandemic has painfully reminded us of a truth we had almost forgotten: "Business isn't everything. But without business, many things lessen or become nothing at all." Ultimately, it will be up to the business community to deal with the social and financial fallout of the COVID-19 pandemic and rise to the challenges facing us globally.

Hamburg must address these changes and actively shape its transformation so that it is not itself shaped by global change. We, the Chamber of Commerce with its 170,000 members, are facing this challenge head on and have launched a location strategy process known as "Hamburg 2040". We have identified and weighted Hamburg's strengths, weaknesses, opportunities and threats in an expansive participation process which also incorporated the diverse perspectives of our local and international stakeholders. The result is an ambitious but realistic picture of Hamburg's future as a business location in 2040. Hamburg can and must grow in alliance with the whole of northern Germany and become more sustainable and dynamic if it is to maintain and increase its competitive edge and quality of life. This is the basis for fostering innovation, training and attracting skilled


personnel, and bringing about sustainable developments in mobility and infrastructure, all of which will ultimately make the metropolis more internationally competitive and a better place to live. By focusing on the specific future concerns which Hamburg's business community believes will be decisive for the success of "Hamburg 2040", we expect to have a greater impact on the location than if we were to focus on individual industries and clusters.

In times of change and crisis, we have to make courageous, even painful structural decisions and adjustments. The Chamber of Commerce intends to take on this task and work with policymakers and partners in business and society to create a dynamic business region in the north of Germany. We also aim to foster sustainable development in Hamburg's economy by promoting technological progress and innovation.

Hamburg Chamber of Commerce



Prof. Norbert Aust  
President



Dr Malte Heyne  
CEO

## 1. Introduction

The next few years will shape Hamburg's future. The world is undergoing a process of change that started well before COVID-19. Global structural changes – from technological development resulting from digitisation to the geopolitical changes caused by a shift in power towards Asia – are gathering momentum, and their impact is ever increasing. The pandemic has exposed (structural) weaknesses that had been masked by global economic recovery after the financial crisis in 2009.

Hamburg has more than one million employees subject to social security contributions, and generates an economic output of EUR 123.3 billion.<sup>1</sup> With more than 170,000 member companies, Hamburg Chamber of Commerce bears great responsibility for the economic future of our city and its prosperity as a whole.

By launching the project "Hamburg 2040", Hamburg Chamber of Commerce has initiated a far-reaching dialogue process focusing on the question "How do we want to live in the future – and what will we live on?"

This process is divided into three phases (cf. fig. 1 "Milestones of Hamburg 2040"):

- Phase I leads off with a focus on dialogue and listening. The aim of this phase is to analyse the current situation, define areas of future importance for Hamburg as a location, and set out a vision and guidelines for the location strategy "Hamburg2040".
- Phase II builds on this. The key question is, "What can the Hamburg Chamber of Commerce do to help implement this location strategy?" During this phase, the areas of future importance will be differentiated and backed up by projects and possible activities.

- Phase III is the implementation phase, which will continue until the end of 2039. The Chamber of Commerce intends to play its part in leading Hamburg into a successful future as a business location and getting its member companies into shape for 2040.

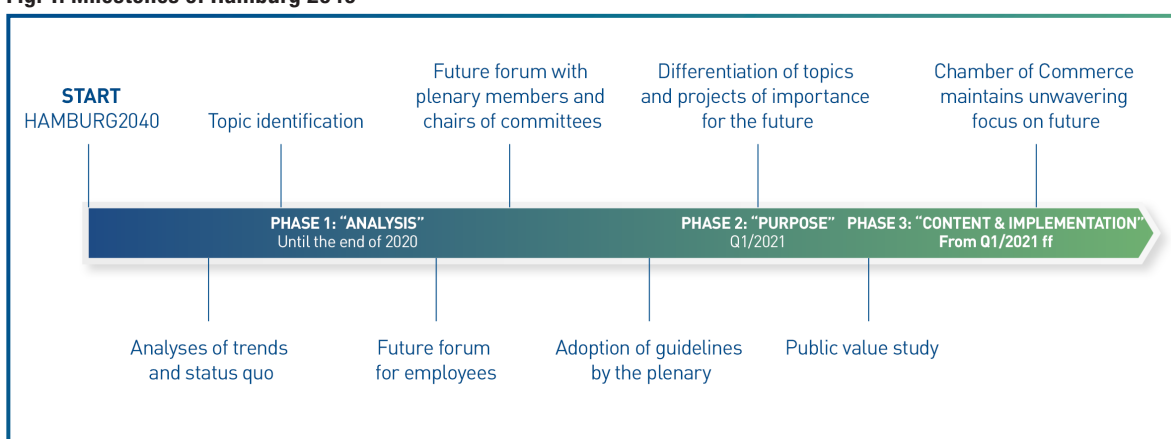
This paper marks the conclusion of Phase I and the start of Phase II. It shows which topics and approaches are crucial for Hamburg's future from the business community's perspective and provides initial answers to the question, "How do we want to live in Hamburg in the future – and what will we live on?"

It summarises the results of our dialogue process, which itself draws on the following elements:

- Discussions in committees and working groups consisting of more than 800 entrepreneurs who are involved with the Chamber of Commerce on a voluntary basis; these relate to the performance of in-depth SWOT analyses of the city of Hamburg and its industries
- More than 70 interviews with national and international experts (stakeholders)
- Member survey of almost 3,200 participants, canvassing their views on Hamburg's position and prospects as a location
- Commissioning of a trend city study for ideas and approaches as to which cities Hamburg can use as role models for important future-oriented topics
- Surveys of trainees, students, young entrepreneurs and staff at the Hamburg Chamber of Commerce
- Submission of forward-looking ideas (video, email) through the Hamburg2040.de website.

<sup>1</sup> Source: Statistikamt Nord (Statistical Office North), statistics from the Bundesagentur für Arbeit (Federal Employment Agency)

**Fig. 1: Milestones of Hamburg 2040**



These elements create a 360-degree perspective of Hamburg as a location and have been discussed, evaluated and consolidated in a "future forum" attended by the plenary and the chairs of the committees. The result is a vision of Hamburg's future from the perspective of Hamburg's business community. An agenda outlining topics of future relevance has been compiled to help this vision become reality and maintain its validity through each political legislative period.<sup>2</sup>

## 2. Analysis of the status quo: today's complacency is jeopardising tomorrow's prosperity.

Almost three quarters of all the entrepreneurs we surveyed took a largely positive view of Hamburg's current profile as a business location. Hamburg's strengths are its central location in Europe, with deep channels that enable seagoing vessels to navigate the Lower Elbe from Hamburg to the North Sea and good hinterland connections by rail and road. As a port and airport location, Hamburg is well integrated into international flows of goods. Hamburg is a cosmopolitan city. Its economic structure (which encompasses aviation and other industries, the maritime economy, renewable energies, international trade, wholesale and retail, the service industry, the healthcare industry, media/IT, tourism and leisure) is widely diversified.<sup>3</sup> A variety of universities and other institutions of higher education, museums, theatres and concert halls provide a broad scientific and cultural foundation that is deeply rooted in society. Numerous foundations, associations and initiatives testify to the civic activity and social commitment of Hamburg's citizens. However, this strong starting position must also be used in competition with other locations.

As far back as 2019, an OECD study stated unequivocally that time is running short if a new course is to be set.<sup>4,5</sup> Until now, Hamburg has lacked the courage, ambition and vision to make decisive changes. Although there are isolated examples of larger, by all means innovative urban development projects such as those in Oberbillwerder and the (eastern) Kleiner Grasbrook district, the last bold, groundbreaking projects of this type were the resolutions drawn up in the 2000s for HafenCity and the Elbphilharmonie concert hall.<sup>6</sup> A certain degree of complacency with the location's status quo are making it difficult to embrace change and head into the future. This is true of policymakers, civic society and even the business community. There are too few companies pressing ahead with the development of their established business models. Hamburg needs the courage to try new things – and good ideas need more venture capital.

There are already warning signs that Hamburg is falling behind in the competition between German locations. A steep north-south gradient is emerging: in terms of added value, innovative strength and unemployment rates, the gap between the north and south is steadily widening.<sup>7</sup> 65 per cent of the respondents who took part in our 2020 location survey believe that Hamburg is inadequately prepared for the future.<sup>8</sup> This impressively illustrates the need to shape the future of our location in the long term – i.e. with regard to structural policy – and not just in the short term, i.e. with respect to economic cycles.

The other results of the survey clearly articulate the multiple challenges we face as a business location:

- Hamburg's thinking and actions are too often limited to its own federal state; there is still insufficient motivation to increase the coordination of economic policy across northern Germany. However, 82 per cent of the survey participants agree or strongly agree with the statement that Hamburg's future opportunities could be better exploited through stronger supraregional cooperation in the metropolitan region and northern Germany.

<sup>2</sup> After the Chamber of Commerce's plenary launched the project in September 2020, ideas and visions of Hamburg in 2040 were collected using the channels described above – supported by a variety of activities that had considerable public impact. In all, 250 theses relating to the target vision of "Hamburg in 2040" were taken or formulated from all the material collected (available at [www.hk24.de/prozess2040](http://www.hk24.de/prozess2040)) and the ideas and visions submitted. These theses were then narrowed down to around 100 and discussed with Chamber of Commerce staff at a "future forum" held on 13 November 2020, after which just under 50 theses remained. These themes and theses were subsequently presented, discussed in groups and differentiated during another "future forum" held on 18 November 2020, this time with the steering committee, plenary, and chairs of the committees and working groups. The results form the foundation of this paper. After being referred to the steering committee on 30 November, the paper was presented to the plenary for resolution on 11 December 2020.

<sup>3</sup> Hamburg Chamber of Commerce (2020): Business centre Hamburg – metropolis of the future; <https://www.hk24.de/blueprint/servlet/resource/blob/1153336/74825fdac1db3cb-801cfe1b884658487/wirtschaftsstandort-hamburg-metropole-der-dynamik-data.pdf>

<sup>4</sup> Our Chamber of Commerce drew this conclusion back in 2017 in its position paper "Competitiveness in the Metropolitan Region"; ultimately, the OECD only confirmed it: <https://www.hk24.de/blueprint/servlet/resource/blob/3611204/6cf8170e81f790b3e8c49ab-8dea9cd2d/standpunkt-wettbewerbsfaehigkeit-metropolregion-data.pdf?shortUrl=%2F-standpunkt-metropolregion>.

<sup>5</sup> OECD (2019): Reports on regional development: metropolitan region of Hamburg, Germany; [https://read.oecd-ilibrary.org/urban-rural-and-regional-development/oecd-berichte-zur-regionalentwicklung-metropolregion-hamburg-deutschland\\_6843d6f0-de#page1](https://read.oecd-ilibrary.org/urban-rural-and-regional-development/oecd-berichte-zur-regionalentwicklung-metropolregion-hamburg-deutschland_6843d6f0-de#page1)

<sup>6</sup> There is a lack of vision, not only in terms of urban development but also in other areas, notably the restraint exercised when investing in universities, the failed bid to host the Olympics, the less-than-determined overtures made to our north German neighbours for the purpose of expanding our cooperation, the settlement of businesses in the region, the designation of industrial areas, and even in the museum landscape. There are plenty of museums, but they do not enjoy sufficient national and international renown.

<sup>7</sup> Detailed information is available at [www.ihk-nord.de/zukunftnorddeutschland](http://www.ihk-nord.de/zukunftnorddeutschland).

<sup>8</sup> A thorough assessment of the location survey is available at [www.hk24.de/prozess2040](http://www.hk24.de/prozess2040).



- The classic driving forces behind Hamburg's economic growth are exposed to serious structural risks. The manufacturing sector, which accounts for 0.25 per cent of Hamburg's companies and almost 10 per cent of jobs in the Hanseatic city besides generating added value in many other areas of business, has been dealt a heavy blow by COVID-19. This is particularly true of Hamburg's aviation industry. Retail and tourism are also facing change, albeit for different reasons. The port is falling short of its potential as a driver of economic development because it lacks a forward-looking strategy that would enable it to adapt to changing global trade flows and supply chains.
- In all, Hamburg lacks innovative beacons that send international signals identifying it as a youthful, dynamic city. Hamburg's economy is perceived abroad as "old economy", as several of the international stakeholders surveyed confirmed.
- Compared with its international counterparts, Hamburg's university and research landscape only enjoys limited success in transferring knowledge and technology to science and industry. Spin-offs are one area in which there is a particular need to catch up. The lack of scientific excellence and critical mass in the STEM sector means that employers – especially tech companies – are experiencing a shortage of qualified personnel.<sup>9</sup>
- Demand for business and residential space is far outstripping supply. However, some of the existing spaces are not used intensively enough. Lifestyle and affordable residential property are therefore important topics for many of those surveyed (36 per cent).

<sup>9</sup> The Hamburg Chamber of Commerce's skilled labour monitor shows that in 2020, for example, 10% of the job vacancies for IT experts in Hamburg could not be filled.

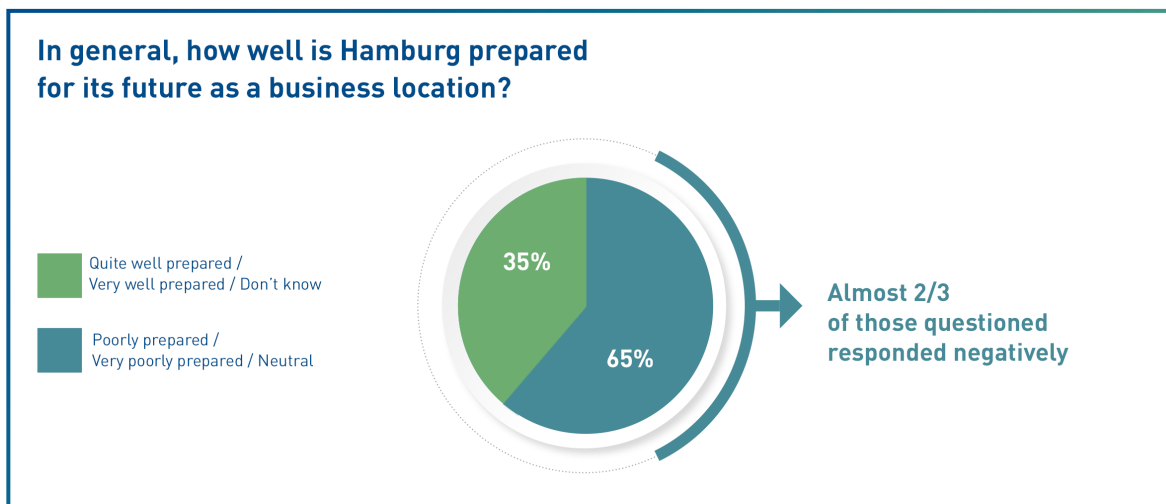
- Cross-border trade – particularly within the European single market – has now become an established part of many Hamburg business models. The increasing geopolitical rivalry between the USA and China is mainly being played out in the economic and technological arenas, which in turn entails risks for Hamburg as a centre of international trade. The conclusion of the Pacific Regional Comprehensive Economic Partnership (RCEP) agreement means a further shift in world trade flows. Only if Europe succeeds in giving a concerted response to these challenges can Hamburg benefit, e.g. from bilateral and multilateral EU trade agreements, the deepening and widening of the EU single market, and the setting of European standards in the digital sector ("Brussels effect").<sup>10</sup>

If Hamburg does not use its opportunities consistently and rise to these challenges, its failure to heed these warning signals will soon have a severely detrimental impact on the prosperity and quality of life enjoyed throughout the region. One example of this is the energy transition: any failure in this respect will have grave consequences for Hamburg as an industrial location. Hamburg and northern Germany have locational advantages in terms of renewable energies and groundbreaking hydrogen technology.<sup>11</sup> This is where the north has to position itself as an innovation leader.

<sup>10</sup> Cf. Bradford, Anu (2020): How Europe rules the digital economy [<https://www.project-syndicate.org/onpoint/brussels-effect-digital-economy-by-anu-bradford-2020-04?barrier=accesspaylog>]

<sup>11</sup> Additional sources on the energy transition in the north: Hamburg Institute of International Economics (HWWI, 2011): The Energy Transition in the North – Opportunities and Risks for the Metropolitan Region of Hamburg as a Production Centre; [https://www.hwwi.org/fileadmin/hwwi/Publikationen/Partnerpublikationen/HASPA\\_Energie.pdf](https://www.hwwi.org/fileadmin/hwwi/Publikationen/Partnerpublikationen/HASPA_Energie.pdf)  
Project initiative "NEW 4.0 – North German Energy Transition"; <https://www.new4-0.de>

Fig. 2: 2020 location survey



### 3. Hamburg 2040 target vision

Hamburg's business community is calling on all stakeholders in Hamburg to come together and consistently shape the future of our location. To overcome these challenges, Hamburg needs a long-term plan for the future along the lines of strategic corporate planning as well as political leadership that will support these goals. Against this backdrop, the Hamburg Chamber of Commerce has developed the following target vision for Hamburg as a location:

#### Innovative, dynamic and sustainable: for competitiveness and quality of life

In 2040, Hamburg is an innovative, dynamic, sustainable and thus more competitive and liveable business region. Hamburg has learnt to think on a large scale encompassing the whole of northern Germany. Hamburg is driving integration in the northern German economic region and has also established itself as the economic hub of northern Europe. The entire metropolitan region cooperates closely and cohesively and serves as a bridge to Scandinavia – politically, economically and culturally. A marked ability to engage in evidence-based discourse – supported by innovative participation models – quickly leads to a broad social consensus regarding the city's development and creates solid support for visions of the future.

Hamburg presents itself as a European metropolis which offers a sustainable, healthy lifestyle. The city is climate-neutral and the principles of the circular economy are applied consistently. The city has intensified its cooperation with organisations in the healthcare system and health industry and is also working with urban planners to create an environment which promotes all aspects of health.

The metropolis offers fast, attractive transport solutions that meet the mobility needs of its inhabitants and businesses. There are also high-speed transport connections with all continents and international economic centres. The port's operations are mostly sustainable; it is controlled digitally and relies extensively on the possibilities of artificial intelligence. Its innovative, future-oriented projects are driving Hamburg's industrial development.

The city is growing dynamically as the result of forward-looking land development and the attractive use of land; it can also set standards of urban development that are recognised internationally. There is enough attractive living space for all current and future residents of Hamburg. The commercial and residential sectors work hand in hand.

All the inhabitants of each district can access retailers, food and beverage suppliers, educational and sports facilities, medical care, cultural offerings, green zones and leisure areas in 15 minutes or less – with advanced digitisation playing an important role when dealing with the authorities. People of all ages feel safe and well.

Together with its partners in northern Germany, Hamburg has created the perfect framework conditions for technical innovations and new business models. Here, new ideas and capital can be brought together at the financial centre, while the universities with their technology transfer and start-up institutions function as a main pillar of the innovation hub with its vibrant start-up ecosystem.

Hamburg gains access to technological, economic and political developments in their early stages and adapts them quickly in line with its own strategy for the future. New ideas – particularly from outside – soon find their way to Hamburg and into its companies. Hamburg's innovations reach market maturity more quickly owing to its collaboration with international partners. Thanks to its diverse global business relations, unilateral dependencies and lock-in effects, Hamburg has developed a reputation as Europe's leading international trade centre and attracts large numbers of visitors to congresses and trade fairs in the city.

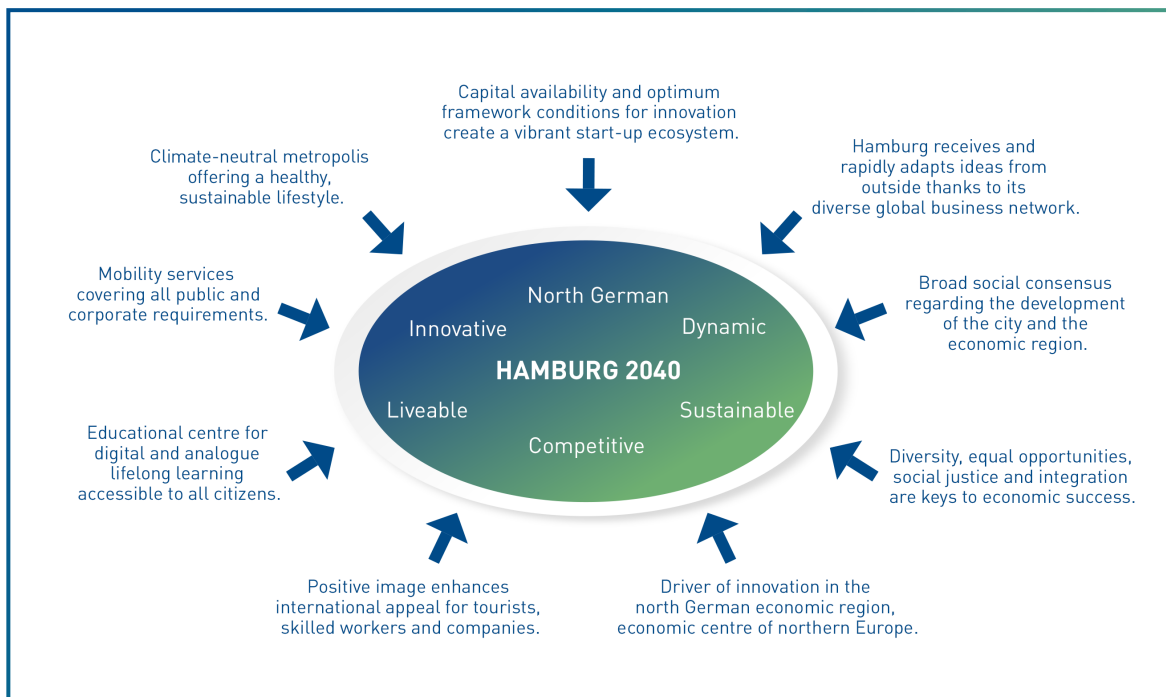
In Hamburg, education is seen as a holistic, lifelong undertaking and is equally accessible to all. Businesses appreciate the opportunities for continuing education and staff qualification. Academic and practical vocational training complement each other perfectly. Up-to-date learning content and comprehensive, innovative concepts for all forms of learning are a matter of course. Members of the public enjoy lifelong learning in digital and analogue formats. They see the qualifications thus obtained as interim goals and milestones on a path of lifelong learning.

The pluralistic urban society lives and works in a spirit of mutual respect, appreciation and open-mindedness. Equal opportunities, social justice and integration are keys to economic success.

Hamburg has achieved international renown not only because of this sense of belonging and identification with northern Germany, but also because of the image it projects of an innovative, dynamic, sustainable – i.e. competitive and liveable – metropolis created by intelligent marketing. Tourists, investors, professionals and companies are attracted to the region, and it is easier to initiate business relations with partners in Germany and abroad.

**In 2040, everyone who has ideas will come to Hamburg to turn them into reality.**

Fig. 3: Hamburg 2040 target vision



#### 4. The future agenda for the Chamber of Commerce

Reliable, business-friendly tax and legal frameworks and a functioning transport, energy and digital infrastructure are "classic" location factors. A trend city study commissioned by the Chamber of Commerce has identified further success factors that will contribute to the location's prosperous development:<sup>12</sup>

- Regional networking to achieve a "critical mass" among the global competition and active "coopetition" with international partner regions
- Existence and acceptance of an institutional driver for "smart" goal-setting and long-term planning<sup>13</sup>
- Social consensus on attractive targets and the ability to make political decisions through discourse
- Focusing activities and resources on selected technologies/industries with a correspondingly oriented, dynamic start-up ecosystem as a driver of innovation
- Active transfer of education and innovation, thanks not least to the general availability of public data

Because of the prevailing political circumstances, Hamburg and its neighbouring federal states can only make a very limited contribution to the achievement of

a critical mass in international competition when each of them is acting alone. This is particularly true of the Hanseatic city as a city state which is subject to land restrictions and has a population of almost two million. The institutionalisation of the metropolitan region is one of the first steps in the process of growing beyond state borders. It must now be given further thought and consistently pursued. Of paramount importance for Hamburg's future is the enhanced coordination of economic policy in northern Germany with the long-term prospect of a largely harmonised north German economic region, encompassing for example legal and tax frameworks, land use and traffic planning, scientific and educational policy, settlement strategy and national/international marketing.

The tradition of the Hanseatic League and the guiding principle of the "Honourable Merchant" serve as a framework of values for Hamburg and for expanded cooperation throughout northern Germany. Aspects of social responsibility, diversity and equal opportunities are key considerations in all themes and projects relating to the future.

<sup>12</sup> Statista (2020): Trend City Study – Report on Results; <https://www.hk24.de/blueprint/servlet/resource/blob/4947980/e505de61cb11cd09fcf008c9a54c8933/zf2040-statista-trend-city-studie-data.pdf>

<sup>13</sup> Cf. OECD study (2015): Local Economic Leadership; <https://www.oecd.org/cfe/leed/OECD-LEED-Local-Economic-Leadership.pdf>

Fig. 4: Overview of trend cities



This being the case, the Chamber of Commerce believes that the following topics are key if Hamburg is to enjoy a successful future.

#### Think north European – act north German.

The increasing cohesion of northern Germany provides the foundation required to strengthen the competitiveness and international connectivity of our economic region. The Fehmarn Belt tunnel will bring Hamburg closer to Scandinavia. Our Hanseatic city must internalise its role as Scandinavia's southernmost city and strengthen the way it is perceived throughout northern Europe. To do this, the networks of both economic regions must be expanded and Hamburg must actively contribute to the creation of a European growth belt encompassing Hamburg, Copenhagen, Malmö and Berlin, with Hamburg at its centre.

#### Set priorities – finance innovation and start-ups.

Hamburg has an array of strong industries and clusters, among them healthcare, logistics, wholesale, international trade and manufacturing, as well as media

and technology expertise in renewable energies, hydrogen, digitalisation and 3D printing. However, Hamburg should concentrate on just a few key technologies and industries and strive for international leadership in these areas. These focal areas should create added value across various sectors and for Hamburg's economy as a whole. A broad consensus is required when deciding which areas to focus on, since they have to be visible in the city (e.g. a "STEM city" around DESY or a "medical city" around the University Medical Center) and give the location an identity. First of all, a critical review must be made and reforms proposed with the aim of making Hamburg the location of one of the largest, most prestigious technical universities in Germany. This requires a significant increase in knowledge transfer to the industrial sector ("Third Mission") and the establishment of locations offering suitable framework conditions for technology-oriented start-ups or entrepreneurial innovations. Hamburg's financial sector has a key role to play in the financing of innovations and enterprises. This includes the extensive activation of venture capital for start-ups.



**Use data – transform companies and attract newcomers.** Hamburg has to become still more proactive in attracting young, innovative, technology and data-based companies with sustainable business models that will form the foundations of Hamburg's economy in 2040. The provision of public data can boost the growth of innovative start-ups, for example in the field of e-health, besides accelerating the settlement of international tech companies and the transformation of established business models in Hamburg. Access to public data can also improve the health, safety and quality of life enjoyed by the people of Hamburg – provided the principles of data sovereignty and data security are adhered to. The Open Data Portal established back in the early 2010s must therefore be expanded, brought up to date and made more user-friendly. In the medium term, the aim is to extend this approach to northern Germany and create a joint repository of standardised data.

**Become climate-neutral – develop a healthy 15-minute city.** The struggle against climate change is one of the major tasks facing us in the future, the goal being to balance economics and ecology. Hamburg can and must become an international pioneer in the areas of climate protection and adaptation. To achieve this, Hamburg must do even more in these areas and use the inherent opportunities to make life and business in Hamburg still greener and more successful besides exporting its expertise in climate issues. The motto for Hamburg's business community is: sustainability through innovation, not through prohibition! Hamburg's economic policy must be consistently aligned with this – above all by exploiting the exceptional opportunities offered by hydrogen technology. The same applies to the development of our inner city areas. One guiding principle is the "15-minute city" modelled on the trend city of Paris. This means that all the city's residents should be able to reach all important places either physically or digitally within approx. 15 minutes. This applies just as much to shopping, culture, education, sport, gastronomy and leisure as it does to work and dealings with authorities. In Hamburg, we could implement this concept using "smart city technologies" to promote mixed-use development, intelligent traffic systems and attractive green zones, thus helping to build a sustainable, climate-friendly and liveable city. The mix of residential and commercial uses and an attractive supply situation in each Hamburg district are crucial to the appeal of the city as a whole. Hamburg's city centre is of paramount importance as a beacon of this development. Hamburg has an exceptional urban structure with comparatively low building densities, spacious green areas and extensive waterways. Together

with the cutting-edge expertise of the healthcare industry, this makes the city particularly resilient during pandemics – a great strength that must be systematically amplified.

**Accelerate performance – facilitate growth.** It is not only Hamburg which is struggling with a participation dilemma. Extensive stakeholder involvement in construction projects often leads to an overweighting of particular interests and causes delays in projects that are important for the location. It increases costs and acts as a deterrent for potential investors, but only rarely does it lead to consensual improvement. In this respect, Hamburg should consider alternative options such as those practised in Spain, Denmark, Ireland and Japan to bring about radical improvements in civic involvement. The rapid realisation of (infrastructure) projects is vital if Hamburg is to move forward into a sustainable future. In view of the limited space available, current forms of usage – especially by infrastructural operations – must always be examined critically and analysed to determine their benefit to the city of Hamburg. New, sustainable urban development projects for creating housing and commercial properties and attracting companies to the area could spur growth in the metropolitan region and increase its visibility.

**Increase accessibility – expand networks.** International networking, whether digital or face-to-face, is an important economic factor. However, this requires good transport connections. At present, there is a particular shortage of direct flights to intercontinental business centres and high-speed rail connections across Europe. Scenarios for the climate-friendly expansion of Hamburg's European and international transport links must therefore be developed and their feasibility examined. This would make it easier to forge political and business connections. Although Hamburg has traditional twinning agreements with a number of cities, it lacks innovative partnerships that could serve as benchmarks and beacons for its own development. It needs more city partnerships that would facilitate access to new markets, bring new ideas to Hamburg's business community and strengthen its political influence. Dynamic, innovative regions such as the Yangtze Delta and Silicon Valley or cities such as Tel Aviv and Boston could be considered as innovation partners.

**Smarter management – using renewable energies and hydrogen.** The port, the airport, and even the exhibition centre must keep pace with structural change. The pioneering role played by Hamburg and northern Germany in the field of renewable energies and the international breakthrough of hydrogen as a source of

energy offer outstanding opportunities to use these energy sources as a guiding principle for location development, e.g. by beginning to use the port as a hydrogen hub, positioning the region as a "green" aviation hub with the Centre for Applied Aviation Research as the nucleus for the development of hydrogen-powered aircraft, or hosting international trade congresses such as the International Hydrogen Symposium. This could also become a core message for Hamburg's marketing activities, which must likewise be intensified to make the Hanseatic city better known internationally and attract more businesses, qualified personnel and tourists in the future.

**Transforming the port – testing the transport of the future.** Hamburg's port is a source and symbol of prosperity. However, its infrastructure, operating costs and accessibility all require urgent work if it is to remain internationally competitive and be restored to its leading position in northern Europe. It must be transformed into a sustainable, digitised port with a modern infrastructure before 2040. With its large spaces and diverse traffic requirements, the port is also an ideal place to perform extensive testing of forward-looking transport solutions. Technological progress and changes in demand mean that Hamburg is facing a mobility revolution that will go far beyond current discussions on car-free city centres or bicycle cities. Vehicles of the future will also drive autonomously and move through the air. Particular attention will be paid to the availability and reliability of mobility solutions. Traffic planning for new means of transport must therefore be developed taking the "smart city" as a model, and framework conditions must also be created for the large-scale testing of innovative mobility projects (e.g. urban air mobility, autonomous driving, district logistics, smart city loop).

**Revitalise trade, the city centre and the districts – use art, culture and sport.** The retail sector is being structurally transformed due to changing customer behaviour, particularly with regard to online shopping. The pandemic has accelerated this process. Trade is losing its unique position as a magnet drawing visitors to inner city areas. New forms of use by cultural institutions and the hospitality and service industries must be established to prevent the city centre and surrounding districts from becoming deserted. Art, culture and sport make a city more liveable in addition to attracting international tourists, students and skilled labour – who in turn visit retailers and bring life to the city centre. Along with the beacon already lit by the Elbphilharmonie concert hall, Hamburg needs iconic museums and a diverse arts and culture scene ("creative

class").<sup>14</sup> Top sporting teams and major international sports events always draw new visitors. They inspire enthusiasm, put Hamburg on the international map, and revitalise the retail, gastronomy, accommodation and leisure industries. Hamburg's healthcare sector develops hygiene concepts and can show the world that they are feasible in practice. A master plan titled "Hamburg – International Metropolis of Arts and Culture" and a new "Future Plan for Sport" should inspire improvements in the quality of life enjoyed by the population and the skilled workforce, revitalise the inner city areas and the surrounding districts, and draw tourists, sports lovers and the sport industry. With regard to wholesale and retail, a "trade innovation hub" should be established to serve as an incubator for innovative, data-driven business models and give a powerful boost to these sectors. The hub could be operated by associations, corporations and the city in cooperation with the Chamber of Commerce.

**Lifelong learning – outstanding education and training.** Providing good education and vocational training is the most reliable way to find the skilled workers of tomorrow and train them as needed. Rigid training profiles and teaching concepts combined with an inadequate focus on practical application are making cooperative study programmes less attractive. Modern vocational education and training is characterised by high quality, individual freedom and opportunities for development, a focus on competence rather than paper qualifications, attractive job openings and career paths, and the ability to switch between different forms of education – all this must be guaranteed. The range of accommodation available to trainees and apprentices must also be expanded. Pilot projects must be initiated in general and vocational schools to implement innovative, comprehensive teaching concepts and increase the use of potential analyses and modern learning content (e.g. programming, data analyses); competition should then be encouraged in the field of best practice. Skilled staff must regularly undergo training and acquire new qualifications. More frequent job changes, new technologies and evolving professional requirements call for the constant acquisition of new knowledge. Qualified continuing education programmes promoting transfer between theory and practice are vital for Hamburg's economy. With them, future key competences and professional knowledge can be passed on and the economy made fit for the future. Hamburg does not offer a range of educational services that bundles all these opportunities.

<sup>14</sup>Cf. Florida, Richard (2012): The Rise of the Creative Class. 10th edition. Basic Books.

## 5. What happens next

This guidance paper marks the end of Phase I and also gives a triple green light:

**1. Green light for a wider discussion process:** The Chamber of Commerce invites all its partner institutions in Hamburg, the north German economic region and abroad – and its 170,000 member companies above all – to actively and regularly engage in dialogue on the future of Hamburg in 2040 and to discuss the question: how do we want to live in the future – and what will we live on?

**2. Green light for Phase II:** The core of this phase is the question, "How can the Chamber of Commerce help shape the future of Hamburg successfully?" In the coming months, the Chamber of Commerce will use this guideline paper to flesh out the identified future-oriented topics with actual projects and measures, discuss its future role in the context of a modelling process, and offer its services as a "location manager" and corporate development partner to its members. As a sparring partner for policymakers and with the backing of 170,000 members, the Chamber of Commerce serves as a translator and mediator between business and politics and can thus take on the role of "location manager", looking around the world for ideas that will benefit Hamburg but also keeping track of the challenges and needs in the city itself and its districts, since various studies have identified this as one of the factors influencing the success of "trend cities".

**3. Green light for regular, systematic reflection on the topics that have been defined for the future:** Technological progress is much too dynamic to let us make forecasts for the next twenty years. Hamburg has to keep asking itself: what new trends are we seeing? What comes after digitisation? Quantum technology and the biological revolution of the economy? What can Hamburg do today to seize the opportunities they offer?

**Join the conversation! You will find further information about the progress of the project along with ideas and impetus for Hamburg in 2040 and opportunities to make a contribution at**

**[www.hamburg2040.de](http://www.hamburg2040.de)**



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