BearingPoint ®

Driving Licence Digital Leaders Study

An assessment of the current service maturity across selected countries

June 2021

BearingPoint Government and Public Sector

BearingPoint ®

Table of contents

Executive summary

This study is the latest in a series of assessments by BearingPoint's Government and Public Sector team of the digital maturity of core citizen-facing public services as Government administrations around the world evolve and reconfigure their services and organisations for the 'new normal' society and economy.

The acceleration of digitalisation initiatives and the rapid deployment of new citizen-facing channels and services has been one of the key priorities for Government organisations throughout the ongoing global pandemic. As citizens and consumers, we can expect to return to ways of working and accessing both public and private sector services that are not 100% digital. However, in both cases the optimum and most-effective balance between digital and in-person engagement will vary significantly between different sectors.

BearingPoint's citizen services maturity model incorporates the leading practices and capabilities that our Government and Public Sector teams have developed from client engagements across Europe. This includes designing solutions to enable the effective delivery of public services for a wide range of central and local Government, social and healthcare organisations. It provides an outside-in, citizen perspective of different public services at a point in time, and how they are designed and delivered, using a two-stage approach. Firstly, an assessment of the overall service maturity based on both general leading industry practices and our knowledge of future trends and possibilities. And secondly, a more detailed evaluation of the digital maturity of the service across several dimensions using BearingPoint's established Digital Leaders Study methodology.

The focus of this study is on Driving Licence Services provided by Government organisations, comparing the service provision and its digital maturity in 19 countries across the globe. Our study includes a review and comparison of the Driving Licence process including licencing, education, and testing. This covers the online service offering, steps in the booking or application process, the provision of information about the process for citizens, the level of digital maturity of the service and the sophistication of the usability of online services.

In the future, with additional developments in digitalisation, autonomous driving, connected vehicles and transport integration, we can imagine a model which has converged to a point where citizens have just two options to take on their smart devices for their journeys. One, do they want a private transport experience, in their own vehicle, configured to the requirements of a point-to-point journey, potentially that they are not operating themselves, and where content and connected services are personalised to their needs. Or two, a public transport experience, potentially using a number of integrated modes, shared with others, at lower cost and with a lower level of personalisation in terms of routes and services.

But for now, each country's Driving Licence service is one that all citizens who wish to legally drive must access. And while it is a service that citizens typically only need every 10 years, key trends like digital identity, increased online service offerings and online usability have driven the transformation of services to different extents across global regions. In this study, we look at the common service design features, unique service elements and digital innovations in the provision of the service to citizens.

Andrew Montgomery
Partner and Global Leader Government and Public Sector

The way forward

BearingPoint's Government and Public Sector team brings an established track record of delivering business and technology change for central and local government, health and social care organisations.

Across Europe our people are working to rapidly design and deploy new solutions to meet the needs of citizens during the current crisis, and to prepare public services organisations for 'new normal' services and ways of working:

| New **business models** to deliver integrated health and social care to citizens | New **ways of working** for front-line and office-based public servants | New **automation technologies** to free-up resources to support service demand | New **agile approaches** to accelerate the deployment of digital channels |

Approach and methodology

The objective of this study is to provide an assessment and comparison of the service provision and digital maturity of the Driving Licence processes provided by the responsible Government organisations in selected countries worldwide. This includes the identification of both constraints and potential opportunities that may exist as countries transition to higher levels of digitalisation and overall service maturity.

The study covers nineteen countries selected from across Europe and other regions to provide a broad global perspective. The countries included in the study are as follows:

- United Kingdom
- New Zealand
- Singapore
- Finland
- Netherlands
- Brazil
- Argentina
- Norway
- Sweden
- Switzerland
- Austria
- Ireland
- Belgium
- Denmark
- Estonia
- France
- Germany
- Italy
- Romania

A two-stage analysis approach was adopted to assess the selected Driving Licence services for the selected countries.

1. The first stage consists of a qualitative review of the service against BearingPoint's Service Maturity Model. This model assesses the overall maturity and capability of the service based on similar service offerings, industry-leading practice, and the opportunities that new technologies and innovations can provide.

2. The second phase, the Digital Capability Assessment, focuses on gaining a more detailed understanding of the digital maturity across the Driving Licence services by conducting detailed analysis and evaluation of digital capabilities. This stage includes further exploration into Driving Licence services that provide a partial or full online experience for applicants. This evaluation was conducted using BearingPoint's Digital Leaders Model which included comparing and scoring the maturity across eleven categories and 27 criteria.

The assessments, evaluations and commentaries were made from an outside-in perspective, based on BearingPoint's established methodology and assessment model. No interviews or direct contact was made with the Government organisations and service providers included in the study.
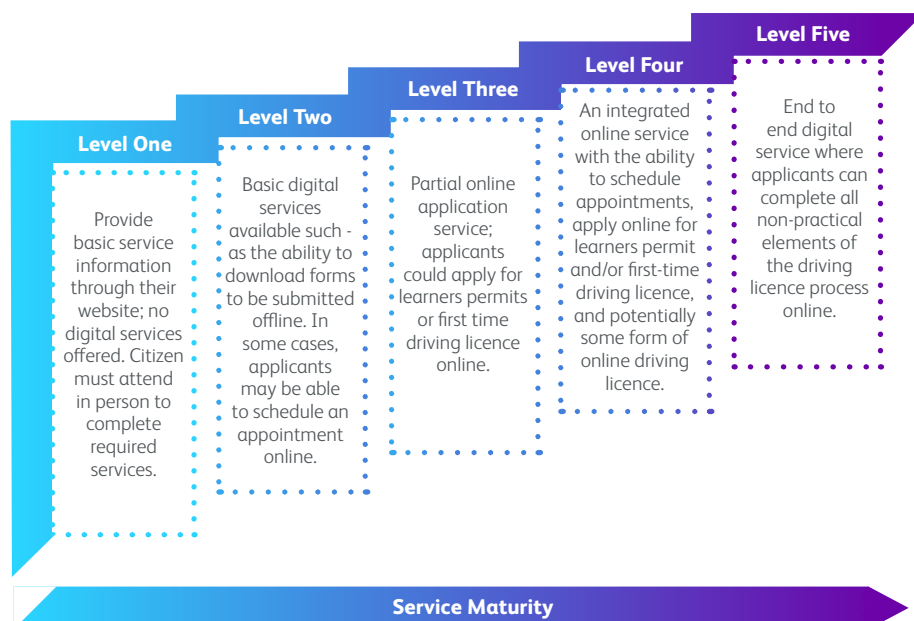
Stage One: Service Maturity Assessment

The Service Maturity Assessment is a five-stage model for measuring the maturity of a Government organisation's service capability and to what level service design is embedded in the organisation. The initial levels represent a more traditional offline service delivery model; as the levels increase, organisations move towards transforming their service delivery into a service design-led organisation, offering an integrated, digital customer journey.

The Service Maturity Assessment analyses the service delivery methods used to allow an applicant to complete a service offering online across the Driving Licence services. Qualitative analysis was used to assess and compare service delivery methods, whilst also considering the service delivery approach from a service offering and service support perspective against the various digital elements available to a citizen.

In addition, improvements in technology have brought changes to many industries. During the study, consideration was also given to points of innovation across Driving Licence services, such as the move towards the use of a digital Driving Licence, remote testing, digital identity, and other unique initiatives across the world.

The diagram below details the levels contained with the Service Maturity Assessment:

Level One

Provide basic service information through their website; no digital services offered. Citizen must attend in person to complete required services.

Level Two

Basic digital services available such - as the ability to download forms to be submitted offline. In some cases, applicants may be able to schedule an appointment online.

Level Three

Partial online application service; applicants could apply for learners permits or first time driving licence online.

Level Four

An integrated online service with the ability to schedule appointments, apply online for learners permit and/or first-time driving licence, and potentially some form of online driving licence.

Level Five

End to end digital service where applicants can complete all non-practical elements of the driving licence process online.

Service Maturity

Stage Two: Digital Capability Assessment

For those Driving Licence services that were identified as level two and above within the Service Maturity Assessment, a further detailed analysis was completed, to gain an understanding of their digital maturity in relation to their Driving Licence process.

An evaluation was made based on 27 objective criteria, defined for two dimensions of digitalisation - online service offering and service support.

A scoring matrix was developed to captured information across four steps of the Driving Licence process – theory test, learners permit, driving test and Driving Licence. Weighted scoring was allocated based on the highest value provided to citizens, where the use of digital tools and channels is availed of, to simplify and streamline their interactions with citizens. Exclusions applied where a digitalised service offering was not relevant, for example, a full online service offering for a practical driving test. The total score was then weighted to calculate an overall digital maturity score for each country included in the study.

The Dimensions

The Online Service

The online service offering dimension evaluates the application types and experience offered to an applicant when using the online service based on key elements of a Driving Licence process.

Service Offering
Assesses how an applicant books an appointment or submits a form using the online channel. For example, booking an appointment online, submitting a form online or downloading a form to submit offline.

Authentication
Evaluates how the online service confirms the identity of an applicant and if required multiple times throughout the process.

Supporting documents
Assesses information available on licence application types, availability of a document checklist and if supporting documents can be submitted via an online channel.

Photo submission
Evaluates if an applicant can submit a photograph online as part of their application.

Turnaround Times
Assesses whether appointment times are clearly stated and if applicants can avail of quicker turnaround times if applications are made online.

Availability
Evaluate if applicants can apply for other licences and/or other services in the same application and if there is an ability to complete core elements of the application online.

Tracking
Assesses if an application can be tracked via an online channel once submitted.

Incentives
Assesses whether the Driving Licence process offer incentives, such as a cheaper service, to promote the online application.

Service Support

The service support offering dimension evaluates the support offered as part of the online service while progressing through the Driving Licence process.

Service Steps
Evaluates the design of the online application journey. For example, the steps to completing a booking or submitting an application online.

Usability
Assesses the user experience of their online journey in progressing through the Driving Licence process.

Service Support
Evaluates the support offered as part of the online service, such as webchat.

Service Maturity Assessment

Stage one of the study included a review of the maturity of the service delivery and design of the Driving Licence service across all nineteen countries included in the study. This assessed the service capability offered to citizens applying for a Driving Licence, highlighting opportunities for countries to digitalise their services further to provide services more effectively and efficiently, and in turn enhancing customer experience. Each country was categorised into one of the five levels of service maturity.

Level One

At Level one, basic service information is provided online, and no digital services are offered. Citizens must attend in person to complete the required services.

Within the Service Maturity Assessment, level one represents a more offline service delivery model for citizens. This level indicates that there is no digital service capability provided to citizens, only basic service information provided through the Driving Licence websites; six countries included in the study were classified as level one.

- Brazil
- Germany
- Italy
- Romania
- Denmark
- Netherlands

Service Design Observations:

- Often level one countries outsource their Driving Licence processes to privately run third parties who focus on the practical elements of progressing applicants through the Driving Licence process - theory test, practical lessons and driving test. This can result in some third parties not investing in the digitalisation of the Driving Licence process such as online booking of theory or driving tests or online booking of appointments for learners permit or driving licence meaning that level one countries are often left behind on the digital evolution journey.

- For the most part, these countries required citizens to attend an office in-person to complete many elements of the Driving Licence process – authentication including producing ID, providing a signature or photograph, producing medical reports such as eye test results, collecting a learners permit or driving licence.

- Level one countries often do not offer their citizens the option of booking appointments or tests online, submitting forms online or the ability to download forms to complete and submit offline.

- Level one countries sometimes provide basic service information online, such as office addresses, opening times and contact numbers.

Level Two

Level two sees basic service information available such as an ability to download forms to be submitted offline. In some cases, applicants may be able to schedule an appointment online.

Countries at level two deliver an enhanced service delivery, they offer partial digital services such as an ability to download forms to be printed, completed, and physically posted or hand-delivered to a Driving Licence service. At level two there is also the functionality to schedule an appointment online, this could include the ability to book a theory test appointment or a driving test appointment online. Nevertheless, this is only the booking of the appointment online, the requirement to physically attend an office to complete tests in person remains.

The following countries were classified as level two on the Service Maturity Assessment:

- Finland
- Switzerland
- Argentina
- Belgium

Service Design Observations:

- These countries provide citizens with the ability to book an appointment online for their in-person service, citizens must attend an office in-person to complete the specific element of the Driving Licence process. The requirement to attend in person is primarily due to the need to complete a physical element of the process, such as, have a photograph taken or provide a signature at the Driving Licence office.

- As expected, due to the in-person requirement, these countries operate a vast number of public offices to facilitate the in-person application process. Mainly, these offices are citizen service offices at a municipality.

- It is interesting to note that countries not offering an online application service have the digital capability available during the in-person application process. For example, sitting a theory test on a computer or taking a digital photograph.

Level Three

At level three there is a partial online service with applicants able to apply for learners permits or first-time licences online.

Level three represents limited digital service, such as, the ability for citizens to apply for learners permits or first-time Driving Licence online. At level three citizens have this functionality without the need to attend a Driving Licence office to complete any additional steps such as providing a signature or having a photograph taken. However, at level three there is limited-service capability, there is not the ability to complete a theory test online or apply for another licence in the same application.

The following countries were classified as level three on the Service Maturity Assessment:

- Austria
- Estonia
- Norway
- France
- Ireland
- United Kingdom
- New Zealand
- Singapore

Service Design Observations:

- Level three countries allow citizens the opportunity to book appointments online, download forms to be submitted offline and apply for their learners permit and/or first-time Driving Licence online.

- In most countries there remains the requirement to attend a Driving Licence office to have a photograph taken or provide their signature. However, in some countries such as France and Singapore citizens can either attend an accredited service to have their photograph taken digitally or upload their own photograph as part of the application process.

- Some level three countries have an automated process for newly qualified drivers receiving their Driving Licences, some countries produce a driver's hard copy driving card while others automatically grant drivers access to a digital licence.

Level Four

Level four sees an integrated online service afford applicants the ability to schedule appointments online, apply for licences online and in some cases some form of digital Driving Licence.

Level four of the Service Maturity Assessment represents Driving Licence services that offer an integrated online service that provide citizens with the ability to schedule appointments, apply online for learners permit and/or first-time Driving Licence, and potentially some form of online Driving Licence.

Only one country was classified as level four on the Service Maturity Assessment:

● Sweden
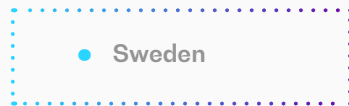
Service Design Observations:

- Level four countries offer citizens some form of digitalised Driving Licence with many countries offering this service via an app or accessible digital licence using a QR code.
- There may be an ability to provide identity documents or supporting material electronically such as the electronic submission of a medical report.
- Level four countries could offer a cheaper service or faster processing times if elements of the application process are completed online, furthermore, some countries may offer online tracking of an application.

Level Five

At level five there is a full end to end digital service where applicants can complete all non-practical elements of their Driving Licence online.

At level five, each relevant step of the Driving Licence process is accessible online. This level provides a fully integrated service whereby applicants can complete all non-practical elements of the process online. There is the understanding that completing a practical driving test requires physical presence, nevertheless, all other elements of the Driving Licence process can be completed online with no need to physically attend a service office to complete any element of the process.

No country in the 2021 Driving Licence Digital Leaders Study reached a level five in their digital maturity.

Service Design Observations:

- Level five countries may offer their citizens a service whereby they can provide a digital photo of themselves or a digital signature, level five countries may have an online portal where identity documents for citizens are verified and stored for use across government services.
- Level five countries could provide the functionality to complete theory tests remotely, applicants could complete their theory test in their own home using secure software.
- Level five countries would offer some form of digital Driving Licence and some could offer an additional service in that the digital Driving Licence could be linked to other licences such as a boat licence.

Next Generation Public Services for the post-pandemic society and economy

Insights, perspectives and experiences from BearingPoint's Government and Public Sector teams in Ireland and across Europe

Digitalisation, organisational agility, the future of work, cloud computing, data security, advanced analytics, artificial intelligence and the allocation of limited financial resources. Just some of the themes and challenges that public services leaders across Europe have had to consider in the context of the modernisation of their administrations. Maintaining public services during the Covid-19 crisis, and planning for the future, has however required a different focus and prioritisation of these areas as the shape of the post-pandemic economy and society becomes clearer.

We deliver new business models, new operating models, new digital channels, new technologies and new ways of working so that our clients can run their organisations more effectively and provide improved experiences for citizens, businesses and public servants themselves.

Our Public Sector journal includes input and ideas from our Government and Public Sector teams based on their experiences of working on over 1,000 client engagement for central, state and local Government, health and social care, education and defence organisations across Europe.
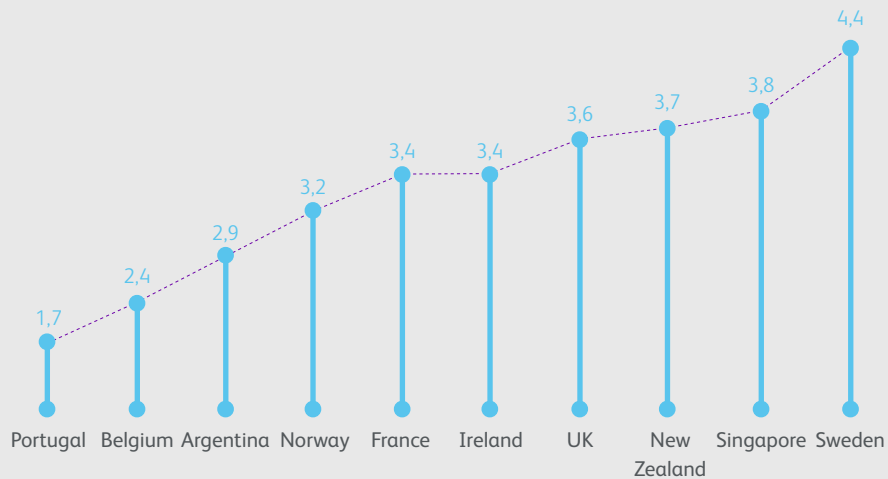
Digital Capability Assessment

The Digital Capability Assessment includes further analysis into the Driving Licence Services that currently provide a partial or full online Driving Licence application service.

Digital Capability Results

A selection of the 19 countries that scored a level two or above in the Service Maturity Assessment were included within the deeper digital capability evaluation. This evaluation was conducted using a scoring matrix analysing 27 criteria across 11 dimensions and was performed by BearingPoint colleagues across the world. The business decision to include Portugal within the Digital Capability Assessment having not been included in the initial Service Maturity Assessment was made for the purposes of business development.

The graph below outlines how each of the countries scored in the Digital Capability Assessment. Overall, the results highlight that all the countries included in the study could benefit from further progression in their digital maturity.

Portugal	Belgium	Argentina	Norway	France	Ireland	UK	New Zealand	Singapore	Sweden
1,7	2,4	2,9	3,2	3,4	3,4	3,6	3,7	3,8	4,4

Note: A scale of 0 – 5 has been applied across all areas of the Digital Capability Assessment

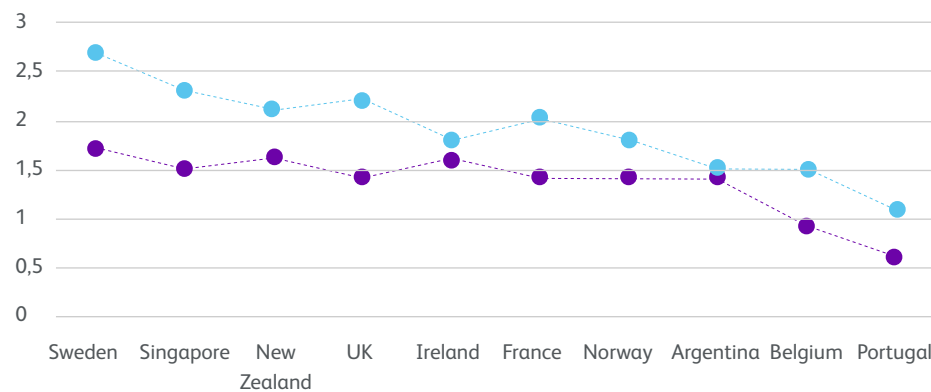# Digital Capability Assessment Dimensions

The graph below outlines how countries scored in each of the two Digital Capability Assessment Dimensions – Online Service Offering and Service Support.

Online Service Offering

The online service offering has raised the bar for service expectations and applicants anticipate a seamless and consistent customer experience. Improvements to online service delivery can achieve significant cost savings and help applicants achieve an effortless process. Many of the countries included in the Digital Capability Assessment utilise digital tools to enhance their online offering at some level, those that do score higher on the overall Digital Capability Assessment.

Service Support

As countries look to accelerate the roll out of digital technology to improve how services are delivered and assess how they can meet the expectations of applicants to deliver services digitally where possible. From an improvement perspective, the availability of online service support is highly important, and this support should ideally be live during the application process.

Summary of findings

This section details the findings for each Driving Licence Service included in the Digital Capability Assessment for countries who scored at level two or above within the Service Maturity Assessment.

Sweden

Sweden stands out for their ability to book three steps of the driving process online: the theory test, learners permit and driving test. In fact, the leaners permit end to end process can be completed online, a commendable feature. Noteworthy digitalisation elements include the ability to book online appointments using e-authentication once and some fields auto-populating applicant's information. These features shed light on how Sweden has achieved a level 4.4 in the digital maturity assessment.

The Swedish process is slightly different to others in that the theory component is split into two sections; one section is completed at the start of the Driving Licence process where applicants are required to participate in an element covering the risks of being under the influence of alcohol and drugs while driving. Whereas the second section is completed closer to the driving test and requires applicants to drive on a slippery surface.

As in many countries, there are the mainstream practical driving lessons with a sponsor or driving instructor in preparing for the practical driving test. However, in Sweden, if a private sponsor is to take a learner driver on practical lessons, the sponsor and learner driver must first complete a 3-hour introduction course.

Another distinguishing digitalised feature is how citizens can complete and submit their vision test with one trip to the optician. Opticians can submit vision results electronically without the need for input from the driving applicant or physical attendance at an office, a standout attribute of this study.

Singapore

Stand out features in Singapore include the ability to complete the learners permit and Driving Licence steps of the process online, with citizens having the ability to submit forms online for these steps. Applicants can also book appointments online for the theory test and driving test. There is too the option to download and submit forms for the learners permit and driving test offline.

There is correct information, checklists, and clearly stated appointment times throughout the Driving Licence process. The study has found evidence of clear and logical steps, with some information automatically populated at the learner permit, driving test, and Driving Licence steps of the process. Applicants are informed of missing detail, offered assistance, and provided with a contact telephone number. When submitting an application or online form, confirmation notices are commonplace, however there is only functionality to save an applicant's progress at the theory test stage.

One feature that is advanced in the Singapore system is the ability to track the progress of an application online in addition to the noteworthy quick timeline of approximately 5 working days to receive a driving permit or licence.

A positive of the Singapore application process is that additional supporting documentation is not required for a learner permit, a driving test or Driving Licence, this is because all supporting documents are verified at the initial stage of the Driving Licence application process. Citizens in Singapore can upload their photograph as a digital file for a learners permit and Driving Licence, this is a standout feature that sets Singapore at a progressive level, reaching a score of 3.8 in digital maturity.

New Zealand

3.7

Overall Score:

New Zealand has a slightly different process in that citizens are required to complete two practical driving tests, one for a restricted licence and one for a full Driving Licence. Applicants can book these practical tests online, however, there remains the requirement to attend an office to complete the booking by providing required supporting documents and have a photograph taken. There is not the ability to book a theory test online, yet New Zealand has an automated and integrated process for newly qualified drivers receiving their Driving Licence. When applicants successfully pass their physical restricted driving test there is an automated process whereby no further input is required from the applicant and they receive their Driving Licence in the post.

The New Zealand Driving Licence process provides information on correct application types and document checklists are available. Clear and logical steps can be followed in booking an appointment with a confirmation notice on booking, however, the New Zealand system does not have the functionality to save progress online or automatically fill in some applicant details. Furthermore, applicants do not have the ability to apply for other licences in conjunction with the Driving Licence application.

United Kingdom

Like many countries, the United Kingdom offers a partial online service for the theory and driving tests whereby applicants can book their tests online but must attend an office to physically complete both the theory test on a computer and the driving test in a car.

Applicants can submit a learners permit application online with evidence of clear and concise information on application types and document checklists available online, however there is not the ability to download and submit forms offline. Nor is there the functionality to submit medical records electronically or an option to apply for other licences in the same application.

One positive feature of the United Kingdom's Driving Licence process that sees they receive a digital maturity assessment score of 3.6 is that when an applicant passes their driving test it is an automated process to receive their physical Driving Licence card. There is no need for applicants to attend an office, submit any documentation or have a photograph taken, once the driving test is passed, the newly qualified driver relinquishes their learners permit to the driving test invigilator and the Driving Licence is posted to the driver within approximately 3 weeks.

Ireland

3.4

Ireland's digitalisation of the Driving Licence process is positive yet currently somewhat disjointed. Applicants are required to complete specific steps of the process across three separate websites: RSA Driver Theory Test, NDLS and RSA My Road Safety sites.

Applicants can book a theory test or driving test online and can apply for a permit or full Driving Licence online. In addition, applicants also have the option to download and submit a hard copy of forms for the theory test, driving test and Driving Licence elements of the process. If required, medical reports can be submitted electronically for the learner permit and Driving Licence elements also.

Throughout the Irish process, there is clear information and a document checklist available online to assist applicants in the process. There is clear instruction and assistance facilities at each step of the process. An advantage is the one-time authentication, this prevents the need for applicants to verify security credentials numerous times while progress through the steps of the process.

Applicants cannot save their progress when completing an application or booking online, furthermore, the functionality to track an application or receive a cheaper/quicker service if elements of the process are completed online is lacking.

France

France is ahead of the curve in that applicants can upload photographs and digital signatures as digital files. Citizens must attend an accredited service to have their photograph taken and provide their digital signature using a stylus on a tablet or touch screen. They are then able to use these digital files when submitting an application form online. Applicants also have the option to download and submit a hard copy.

Applicants must visit several separate websites in progressing through the steps of the Driving Licence process in France, however there is only the requirement to enter authentication information once for each stage.

France is advanced in being able to complete a booking or application on one webpage, with the capability to complete two of the four core elements of the process online – the learners permit, and the driving licence steps. This is reflected in France's scoring of 3.4 in the digital maturity assessment.

Stand out features include the efficiency of auto filling information and notifying applicants of missing details when completing an application or submitting a booking online. A unique feature of the French process is the ability to track an application online, however, like most other countries included in the study, the online service is not cheaper than the hard copy or face to face option.

Norway

There is quite an extensive process to obtain your Driving Licence in Norway, citizens 15 – 25 years old are required to complete a 17-hour basic traffic course (10-hour theory class, 4-hour driving in the dark and 3-hour first aid course) before being authorised to take practical driving lessons. However, citizens aged 25 years old and above are exempt from the 10-hour theory class. All applicants must successfully complete a theory test, driving in the dark, first aid and a 17-hour safe driving course (4-hour on a practice track and 13-hour on the road) before being able to take their practical driving test.

Norway achieved a score of 3.2 in the digital maturity assessment. One distinguishing feature of the Norwegian Driving Licence process is that when citizens are granted either a learners permit or a full Driving Licence, they are automatically granted a digital permit or licence. The digital learners permit may be accessed through the Public Roads Administration's webpage (DinSide) and the digital driving licence can be accessed through the Førerkort (Driving Licence) app. Drivers can let someone inspect the validity of their personal information on their digital Driving Licence by scanning a QR code. Digital data includes the driver's name, date of birth, photograph, licence number, categories and licence date of issue and expiration. When scanned, a request to allow another person to access valid Driving Licence data is sent, and on approval, the data is accessible on the other person's device for up to 5 minutes.

In Norway, both the driving test and the Driving Licence are cheaper if paid for online, citizens can track their progress seeing steps that they have completed and those yet to complete and can view the overall progress of their application online. Nevertheless, digitalisation is lacking when there is a requirement to provide additional health information such as an eyesight report, when applicants are to produce ID and when a photograph is to be taken for their physical driving licence card. Yet, this photograph can be taken at the same time as completing the physical driving test to avoid separate trips to an office.

Argentina

A point of interest in Argentina is that there is no learners permit step to the Driving Licence process. Learner drivers are not required to hold a learner permit to take driving lessons with a private driving school in preparing for their driving test.

The primary process in Argentina is that applicants complete their theory test on a computer at a government facility, take practical driving lessons in preparing for their driving test and when ready complete their practical driving test at a government-run testing centre. If successful, the applicant receives a hard copy Driving Licence at the government facility and can then access their Driving Licence digitally using their miArgentina account. An interesting component of the digital licence is that during the pandemic citizens can access a certificate which grants authority to move around their locality.

In Buenos Aires, there is the option for learner drivers to complete the full Driving Licence process – theory test to driving test – in one day. In this instance, the applicant would complete their theory test at a government-run theory testing office in the vicinity as a practical driving testing centre. Should the applicant be successful in both steps of the process a hard copy Driving Licence is also issued onsite, a process that is not digitalised yet is efficient.

There is a basic digital function that applicants can use to book testing appointments online – theory test and driving test – however, there is no functionality to either submit forms online or download forms to be printed and submitted offline. This is reflected in Argentina's digital maturity score of 2.9. Of the elements that are online there is clear information, a document checklist and clear booking confirmation. There is no functionality to upload supporting documentation electronically, save a user's progress, track an application, or receive a quicker service if the step is completed online. There are clear steps to the process in that there are logical steps to booking a testing appointment online with an ability to navigate and book on one webpage. However, limitations include the inability to access webchat or an assistance button when online.

Belgium

The method of attaining a Driving Licence in Belgium is a decentralised process, overseen by the local community (authority). For the purposes of this study, information was collected for the largest community - the Flemish region.

There is no online function for the learner permit or Driving Licence steps of the Driving Licence process in Belgium. Citizens are required to attend a community office to physically submit their test results for the theory and driving test, with no automatic or integrated service available. There is a basic online function for the theory and driving test steps of the process, these elements are outsourced to private companies throughout Belgium to act on behalf of the authorities in adjudicating practical tests.

In relation to the theory and driving test steps of the process, private companies focus on completing the in-person tests rather than providing a digitalised or integrated service for applicants. This can be seen in the primitive functionality of the outsourced company websites that allow applicants to book tests online but lack the ability to complete forms online or download forms to be submitted offline. This is reflected in Belgium's low digital maturity assessment scoring of 2.4.

In the Belgian process, there is no ability to submit medical reports electronically or upload a photograph digitally, however supporting documentation is required at each step of the process when attending physical offices and test centres. As there is no online feature for learner permits or Driving Licences, and limited information in relation to theory and driving tests on individual websites, there is not an ability to complete any of the four steps of the process end to end online.

Advantages of the Belgian process, for theory and driving tests, is the clear and logical steps when booking with individual companies online and the delivery of booking confirmation for applicants.

Portugal

Portuguese citizens have no interaction with government services or offices throughout the Driving Licence process. The only instance in which an applicant would interact with a government authority is if there are extenuating circumstances, such as a learner's permit extension request where the learner driver has not successfully passed their driving test within a two-year period or a driving licence renewal application if their licence expired over two years previously.

This lack of interaction with government services extends to the collection of a learner driver's photograph and signature as there is no requirement for applicants to attend a government service office to provide their photograph or signature as this is collected by the applicants chosen driving school. There is no digitalised element to this process. Learner drivers provide the private third-party driving school with their physical citizen card and a passport-sized photograph, which the school scans and sends to the government authority that issues the hard copy Driving Licence card. There is no option to apply for other licences in the same application as a digital licence is not available in Portugal.

In progressing through the process, applicants complete each step with a driving school, starting with an initial visit to a private driving school to enrol. The theory test is completed through the school and a learner driver is then issued a driving permit on successful completion of 10 theoretical classes. Practical driving lessons are also conducted through the driving school and when ready, the applicant also organises the practical driving test here. This is an in person process with no ability to book appointments online or submit forms online, however there is an option to download and print forms for a practical driving test only.

Due to the Portuguese system being an offline service there is no online or digitalised option available for steps such as appointment times clearly stated online, quicker timelines if appointment booked or forms completed online or a cheaper online service. The slow progression of Portugal's digitalisation has resulted in the country's low digital maturity assessment score of 1.7.

Points of Innovation

This section showcases standout digital innovations, unique service elements and progressive usability features across global regions in the provision of services to clients throughout the Driving Licence process.

Ireland

Ireland is currently piloting remote theory testing using ProProctor Remote Testing software which allows applicants for certain tests (currently bus/truck, Approved Driving Instructor and Driving Certificate of Professional Competence) to take their theory test remotely. It is expected that this will be extended to included private car and motorcycle theory tests as the global pandemic extends into 2021.

New South Wales, Australia

In the most populated state in Australia, New South Wales, citizens have access to My Services App. This app allows users to view their Driving Licence and vehicle registration details, update licence address and contact details. Other features include the ability to view, pay and contest infringement notices, check demerit points and view photographs of traffic incidents. A distinguishing feature of the New South Wales app is the functionality to view a user's digital Driving Licence and the linking of other licences such as Recreational Fishing Licence.

Singapore

Simulator driving training has become a mandatory component of the Driving Licence process in Singapore. Here all learners are to complete simulator training before being allowed to book their practical driving test, this is being used to help learners prepare for various road situations and instil safe driving habits. Simulator training is based on the top 10 causes of traffic accidents resulting in injuries.

Argentina

Argentina delivers an advanced services app for citizens, the Mi Argentina app. This app allows citizens to store their digital Driving Licence as well as other forms of medical certificates such as vaccination certificates. It is envisioned that the app will soon include the functionality to store digital vehicle insurance and roadworthiness documents. Mi Argentina app is advanced in that it notifies users of when their Driving Licence is due to expire and information on how to renew it.

Finland

Finland has focused on security in developing their digital Driving Licence, here they use two information security levels, visual security, and backend security. The visual security prevents motion capture frauds with a digital water mark combined with a continuously animated background. Whereas backend security includes a QR code where the user can choose what information to include, and a traditional barcode with the same data content as a physical licence.

Estonia

Estonia's e-identity app is the cornerstone of Estonia's digital society and as such offers e-services in both the public and private sector. The app can function as a digital Driving Licence with noteworthy features including the ability to use the app as proof of ID to log into bank accounts, give a digital signature, participate in i-voting and check medical records.
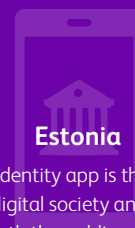
India

In striving to better the quality of drivers, the National Capital Region of India moved to add rigidity and transparency to the testing process, here they introduced a new breed of automated test tracks. The first facility of this type resulted in the number of people who passed their driving test declining significantly. It is suggested that tougher tests mean that the quality of drivers being issued a licence will improve drastically and as such improve road safety. Stricter testing protocols include road sensors, CCTV camera and an alarm system alerting an invigilator should an error occur.

United States of America

In the USA, Germalto, a private company received a $2M grant to implement a pilot for a secure digital Driving Licence across five jurisdictions - Idaho, Colorado, Maryland, Washington D.C., and Wyoming. It is said that this project "will harness Gemalto's core expertise in security and identity to enable a convenient and secure way for citizens and authenticating parties to exchange and verify government-issued credential information via smartphone." The key focus of this project is to promote convenience, security, privacy, and trusted data management.

United Kingdom

In the United Kingdom the driving authority, DVLA, investigated how they could enable people to do the theory test digitally in a way that is secure and valid, to create a theory test fit for the future. The proof of concept combined emerging technologies like AI, and existing solutions such as voice recognition and key stoke analysis to create a prototype that would improve users' experience by allowing them to take the test remotely. This has given the DVLA a roadmap to a digital version of the theory test that is realistic and achievable giving them the confidence to say "we see a future where the theory test is something you take, not somewhere you go

First Aid

Many countries across the world require learner drivers to complete first aid training as part of the Driving Licence process. To qualify for a driving theory test in Switzerland, applicants must prove that they have undertaken 10 hours of first aid instruction. Since 2016 in Germany, there has been a single first aid course for applicants for all categories of Driving Licence. That course takes seven hours and consists of nine 45-minute lessons. In the Czech Republic, learners must take obligatory lessons in a driving school, including four 45-minute first aid lessons and in Austria the first aid training requirement is 6 hours of mandatory training during the theory stage of learning.

Additional noteworthy country summaries

Germany

In Germany, the Driving Licence process for a first-time applicant is managed by third party, private company driving schools. Here driving schools coordinate the journey through the process from theory test preparation to receiving a hard copy Driving Licence card.

Citizens must attend a driving school in person with required documents such as ID, first aid certificate and an eye test optician report to initiate the process. Driving lessons with the driving school occur in various driving conditions such as night-time driving, city driving and autobahn driving.

One element that is unique to Germany is the attendance of three individuals during the practical driving test – the applicant, the driving school instructor, and a testing representative. TÜV, DEKRA or another authorised testing organisation is the authority that manages annual vehicles safety checks on behalf of the government, but they also invigilate on driving tests alongside the private driving school companies during practical driving tests.

The testing organisations are also responsible for producing and administering the hard copy Driving Licence card on successful completion of a driving test. This process is noteworthy in that the testing organisations produce the hard copy Driving Licence in advance from the Bundesdruckerei (Federal Printing Office) of the practical driving test being sat. If successful, the applicant receives the hard copy licence card on the spot however should the applicant be unsuccessful in their driving test the licence card is kept until they are successful.

Netherlands

The Netherlands is distinctive in that they do not have a learners permit step to the Driving Licence process. There is no requirement to receive a learners permit or a provisional licence before taking practical driving lessons, furthermore applicants do not need to successfully pass their theory test before starting driving lessons with a driving instructor. Nevertheless, the theory test must be successfully passed before an applicant can book their driving test.

The digitalisation of the Netherlands Driving Licence process is quite limited, applicants can only book their theory test and driving licence appointments online. There is no ability to submit forms or applications online therefore none of the four driving licence process steps can be completed end to end online.

There are clear and logical steps when booking a theory test online, authentication is required, and theory test time is clearly stated on booking. Similarly, there is a document checklist and supporting documents available when booking a Driving Licence appointment and confirmation of a booking for a Driving Licence appointment. Missing information is flagged at both steps of the process and contact telephone numbers available online for both also.

Commentary

The characteristic Driving Licence application process is as follows: An applicant applies for their learners permit while simultaneously studying for the theory test, they complete practical driving lessons with a private driving school and with a family member. When the applicant feels ready, they apply to take their practical driving test which is typically adjudicated by a government official, on successful completion they either automatically receive, or apply for, their hard copy Driving Licence which arrives in the post, some countries offer the option of downloading a digital Driving Licence at this time also.

As always there are exceptions to the norm with some countries not having a learner's permit - Argentina - while others require learner drivers to complete additional study in preparing for their practical driving test, for example, first aid test, driving in the dark or driving in dangerous weather conditions courses. In some countries, theory and practical testing is outsourced to private third-party companies which can be seen to hold the digitalisation of the process back.

It is a common requirement for applicants to attend a government office in person to provide evidence of ID, have a photograph taken and/or provide a signature, only in two countries is there the option to provide a photo and signature electronically – France and Singapore. This is also true in providing evidence of an eye-sight optician report, Sweden was the only country where applicants can submit their results directly from the optician's office. One further point is that the United Kingdom and New Zealand have a streamlined process whereby when an applicant successfully passes their driving test, they automatically receive their hard copy licence in the post. It is often the case that countries do not offer the option of applying for other types of licence in the same application as the Driving Licence.

It is commonplace for certain elements of the Driving Licence process to be integrated and digitalised, specifically the booking of appointments or tests online. There are often clear document checklists, confirmation notices, web support and contact information available. Counter to that there is often an inability to save a user's partly completed application when completing forms online, a lack of functionality to auto-populate information and a lack of digital capability such as the functionality to track application progress or receive preferential fees if the application is completed online.

In all, although the Driving Licence process is often disjointed, not fully integrated or digitally mature it seems that countries included within this study have reluctantly accepted the unwieldy process. It is understood to be the norm with no digitalised alternative as quite often this is a process that citizens only complete once in their lifetime.

Contacts

Author

Sórcha Carty
Consultant, BTC, People and Strategy
sorcha.carty@bearingpoint.com
+353 1 418 1274

BearingPoint Government and Public Sector contributors

Andrew Montgomery
Partner and Global Leader Government and Public Sector
Ireland

Joel Eriksson
Business Analyst, CME
Sweden

Shilpa Boranna
Manager, BCM
Singapore

Shaun Percival
Technology Architect, Ireland
New Zealand

Jessica Davies
Business Analyst, XS
United Kingdom

Claire Grogan
Senior Business Consultant, XS
Ireland

Paul Allen
Director, BTC, People and Strategy
Ireland

Mari-Anne Moerk
Manager, XS
Norway

Bram Van Meldert
Senior Business Consultant, XS
Belgium

Damian Schapiro
Business Analyst, Globant
Argentina

Lourenco Cruz
Business Consultant
Portugal

Maria Trullen Malaret
Business Consultant, GPS
France

BearingPoint Government and Public Sector Country Contacts

Andrew Montgomery
Partner and Global Leader Government and Public Sector
Ireland
andrew.montgomery@bearingpoint.com

Per Yhde
Partner Sweden
per.yhde@bearingpoint.com

Bard Seiersnes
Senior Manager Norway
bard.seiersnes@bearingpoint.com

Sylvain Chevallier
Partner Belgium
sylvain.chevallier@bearingpoint.com

Stewart Johns
Partner UK
stewart.johns@bearingpoint.com

Axelle Paquer
Partner France
axelle.paquer@bearingpoint.com

Andrew Montgomery
Partner and Global Leader Government and Public Sector
Portugal
andrew.montgomery@bearingpoint.com

Andrew Montgomery
Partner and Global Leader Government and Public Sector
Singapore
andrew.montgomery@bearingpoint.com

About BearingPoint

BearingPoint is an independent management and technology consultancy with European roots and a global reach. The company operates in three business units: The first unit covers the consulting business with a clear focus on five key areas to drive growth across all regions. The second unit provides IP-driven managed services beyond SaaS and offers business critical services to its clients supporting their business success. The third unit provides the software for successful digital transformation. It is also designed to explore innovative business models with clients and partners by driving the financing and development of start-ups and leveraging ecosystems.

BearingPoint's clients include many of the world's leading companies and government organizations. The firm has a global consulting network with more than 10,000 people and supports clients in over 70 countries, engaging with them to achieve measurable and sustainable success.

For more information, please visit:
Homepage: www.bearingpoint.com
LinkedIn: www.linkedin.com/company/bearingpoint
Twitter: @BearingPoint

Government and Public Sector

Globally, Government & Public Sector is BearingPoint's largest consulting market segment and in Europe our teams deliver services to our clients from a network of offices across 19 countries. These clients include Central Government Ministries and Agencies; State and Local Government, and City Municipalities; Defence Forces; Health and Social Care Providers; Educational Institutions, as well as a range of international and EU Governmental organisations and donor agencies.

The consulting engagements on which we are engaged by our Government & Public Sector clients across Europe span a diverse range of citizen and business-centric needs, societal and economic challenges. Our teams bring depth and breadth of capability across all the core functional areas of Government and Public Sector organisations including policy and strategy formulation, service design, citizen and employee experience improvement, organisation design and operational improvement – across back, middle and front office functions – and enabled by digital technologies, integrated platforms and advanced analytics.

Above all, Government & Public Sector organisations across Europe choose to work with BearingPoint based on our partnership and people-centric approach. Our core mission is not just to provide advice. Or to take over. Or provide software. Or to run parts of our clients' operations for them. Our fundamental objective is to design and deliver innovative business solutions, enabling technology and organisational capabilities for public servants - so that they can manage and run their organisations more effectively. And ultimately to provide better, more responsive and customer-centric services to the citizens and businesses that they serve.

BearingPoint ®