

Driving Urban Advantage in the Next Economy

The Global South City Competitiveness Index (GS-CCI) 2025/2026

Highlights



At a Glance

Driving Urban Advantage in the Next Economy introduces a driver-based framework for understanding city competitiveness—going beyond outcomes to the underlying capabilities that make performance possible. The report benchmarks cities across core dimensions and pillars, offering a practical, evidence-led picture of strengths, gaps, and strategic opportunities.

Importantly, this report is not intended simply as a benchmarking exercise. It is a strategic framework and decision-support tool — to help city leaders, policymakers, investors, and development partners identify priorities, make ambition-driven choices, and translate insight into action. By linking competitiveness with governance capacity, spatial development, and international cooperation, the report offers a practical pathway from assessment to strategy

— **Alexey Prazdnichnykh**

Project Lead, Global South City Competitiveness Index (GS-CCI) 2025/2026

Key Findings



The Next Economy is reshaping how cities compete.



Uneven competitiveness remains a defining feature of the Global South.



Urban competitiveness is the ability to generate and sustain long-term value.



Ambition-driven strategy is the starting point for strengthening competitiveness.



The Index is a driver-based tool to assess Global South cities' competitiveness.



Future-Proof Governance determines whether ambition delivers results.



Several Global South cities have emerged as global competitiveness leaders.



Aligning economic priorities with spatial development accelerates competitiveness.



Cities follow distinct competitiveness trajectories.



International cooperation amplifies urban competitiveness when focused and practical.

How the Next Economy Is Taking Shape

Five systemic megatrends are shaping the future of city competitiveness in the Global South: geopolitical tensions, growing economic weight of the Global South, technological breakthroughs, demographic growth and rapid urbanization, climate and resource pressures.

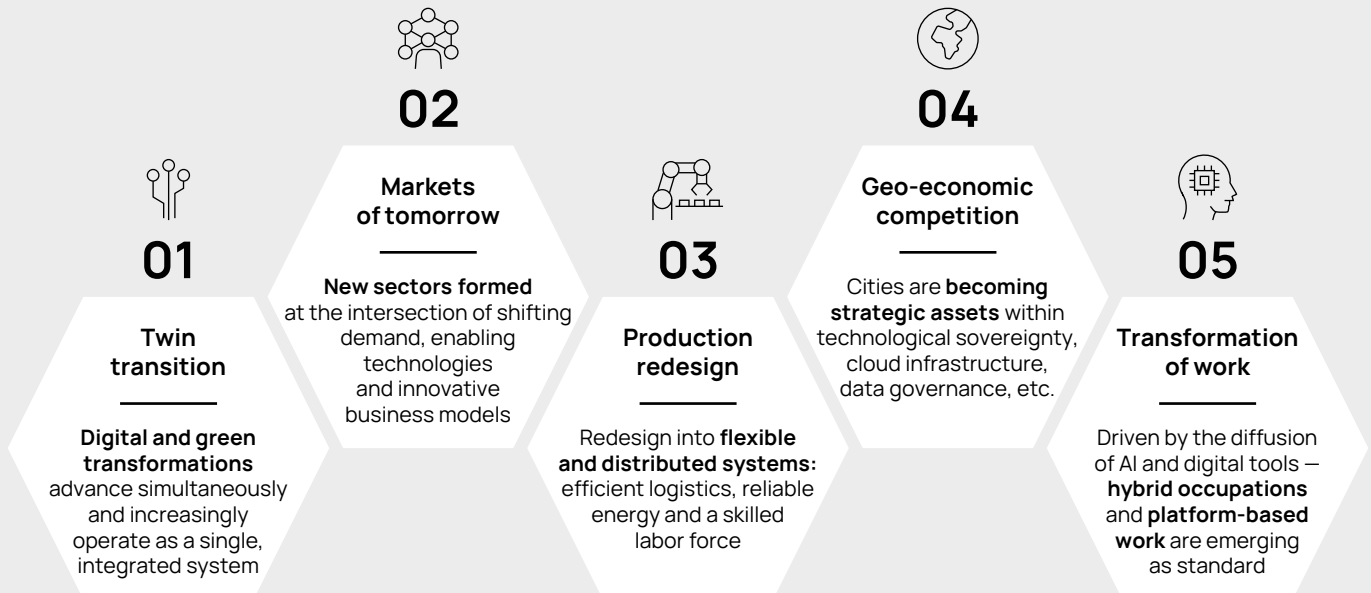
The Next Economy is emerging from these trends, characterized by **five interconnected attributes** – twin transition, markets of tomorrow, production redesign, geo-economic competition, and transformation of work – that are reshaping how value is created and how cities compete.

Opportunities created by these shifts enable to harness demographic momentum and rapid urbanization, adopt new technologies, integrate into emerging economic corridors and value chains, and strengthen growth, investment, and knowledge exchange through city-to-city cooperation.

Risks of exclusion from higher-value value chains if cities fail to build modern infrastructure, energy systems, digital connectivity, climate resilience, and effective institutions, as well as widening labor-market divides are also increased by these shifts.

As this global transformation gathers pace, competitiveness in the Next Economy becomes a decisive differentiator. Cities can no longer rely on reactive adaptation alone, success depends on proactive strategy.

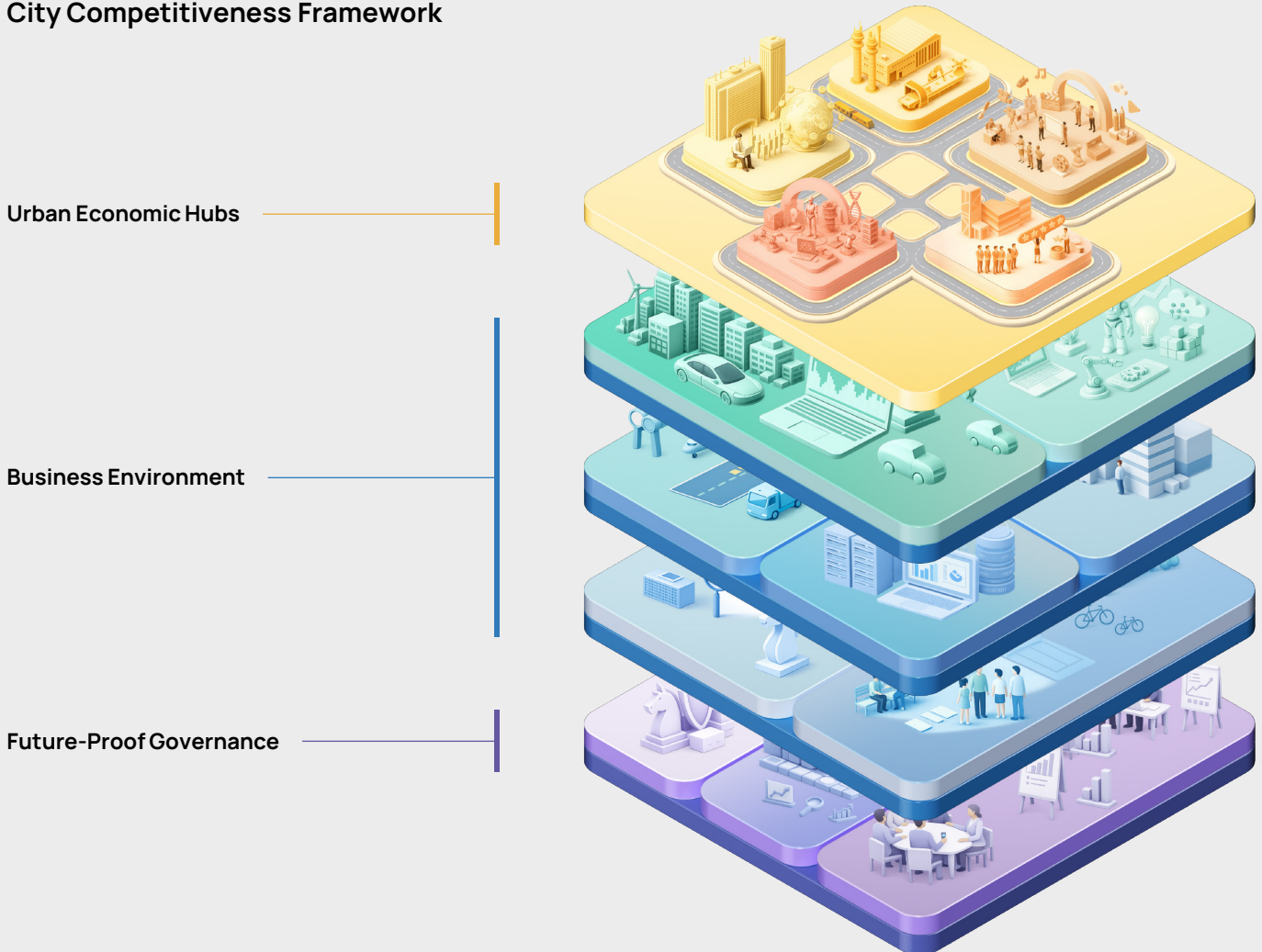
Five Attributes of the Next Economy



Rethinking Urban Competitiveness

Urban competitiveness reflects a city's ability to create and sustain a business environment that drives economic activity, supports a favorable economic structure, and underpins long-term economic performance. The overall framework encompasses three interlinked layers – Urban Economic Hubs, Business Environment, and Future-Proof Governance. Together they describe how a city builds, sustains, and adapts its competitiveness.

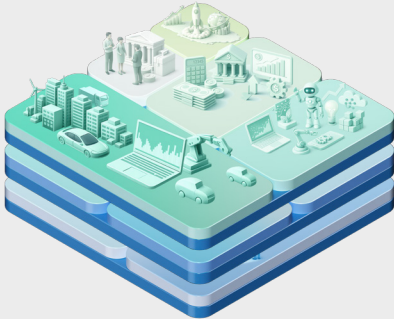
City Competitiveness Framework



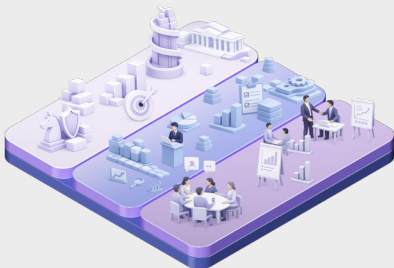
Together, these three levels are a powerful platform for diagnosing urban strengths and weaknesses, and for shaping strategies that respond to the demands of the Next Economy. They provide a common foundation for analysis and benchmarking.



At the top of this structure are the **Urban Economic Hubs** — the engines that generate value, build identity and establish global relevance. These hubs reflect the city's roles in national development and international value chains — as centers of livability, trade, production, creativity, or technological innovation



Supporting these hubs is the **Business Environment** — the conditions that allow economic activity to take root and expand. This includes regulatory stability, institutional efficiency, infrastructure systems, and human capital — all essential to firm-level productivity and investor confidence.



At the foundation lies **Future-Proof Governance** — the strategic and institutional capacity of the city to plan, adapt, and deliver. In an age of shocks and transitions, cities must go beyond managing the present. They must design resilient systems, align stakeholders, and lead change. This level determines whether cities can translate ambition into sustained competitiveness.











The Global South City Competitiveness Index (GS-CCI) Composition

The Global South City Competitiveness Index (GS-CCI) 2025/2026

is an advanced composite benchmarking tool assessing the core, measurable foundations of urban competitiveness. It evaluates key drivers across the business environment, while also capturing selected aspects of Future-Proof Governance and urban economic hubs and clusters.

The Index measures urban competitiveness across three overarching dimensions, each supported by a structured set of 10 pillars and 50 sub-pillars.

The Global South City Competitiveness Index (GS-CCI) Composition

	Dimension	Pillar	Weight	
The Global South City Competitiveness Index (GS-CCI) 2025/2026	Economic & Enabling Environment	01	 6%	Economic Endowments & Conditions
		02	 6%	Business Sophistication & Dynamism
		03	 9%	Financial Resources & System
		04	 14%	Technology Development & Innovation Ecosystem
		05	 8%	Governance Capabilities & Institutions
	Infrastructure & Systems	06	 9%	Real Estate & Built Environment
		07	 10%	Connectivity & Mobility
		08	 10%	Digital & Data Infrastructure
	Talent & Livability	09	 18%	Human Capital & Education System
		10	 10%	Livability

Measurement approach

The **Global South City Competitiveness Index (GS-CCI) 2025/2026 dataset** is built on **257 indicators** of **five data types** that capture quantitative and qualitative aspects of urban competitiveness – official statistics, big data sources, survey data, structured checklists, and social listening insights.

The Index developed through a **three-phase process** that integrates academic and applied research with statistical modeling and analysis. The methodology follows international standards for composite GS-CCI construction and draws on globally recognized practices.

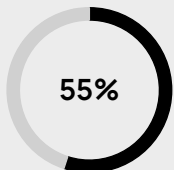
The **Global City Business Insights Survey**, engaged 2,400 business executives in 48 cities to build a detailed view of local business environments. The survey used 73 closed-ended questions, was translated into local languages, and was conducted either online or in person, depending on practical considerations and field efficiency.

Five Data Types



Official Statistics

National, regional and municipal statistics, data from international research centers



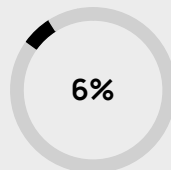
Survey Data

The Global City Business Insights Survey in 48 cities, other international surveys (business leaders, population)



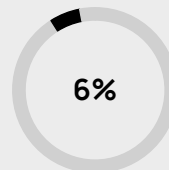
Big Data

Geographic, transportation mobility, web activity data



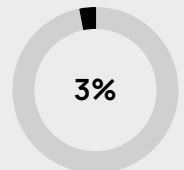
Social Listening

Public sentiment research using online platform and social media data



Expert Check Lists

Expert and qualitative assessments













The Global South City Competitiveness Index (GS-CCI) 2025/2026 Overall Rankings

The Global South City Competitiveness Index (GS-CCI) 2025/2026 evaluates **48** cities – **40** in the Global South and **8** global benchmark cities.

The Index results are presented as a composite score through **five competitiveness leagues**, categorizing cities into Leading, Advanced, Developing, Emerging, and Nascent based on overall performance analysis.




The Global South City Competitiveness Index (GS-CCI) 2025/2026 Overall Rankings






	Overall	Global South	Score
01 Leading Tier	01  Singapore	01  Singapore	69.6
	02  New York	 New York	69.5
	03  London	 London	67.5
	04  Dubai	02  Dubai	64.1
	05  Beijing	03  Beijing	63.6
	06  Amsterdam	 Amsterdam	62.2
	07  Shanghai	04  Shanghai	60.5
	08  Hong Kong	05  Hong Kong	59.9
	09  Abu Dhabi	06  Abu Dhabi	58.8
	10  Toronto	 Toronto	58.7
	11  Tokyo	 Tokyo	57.2
	12  Seoul	 Seoul	56.8
02 Advanced Tier	13  Tel Aviv	 Tel Aviv	52.3
	14  Riyadh	07  Riyadh	52.2
	15  Doha	08  Doha	51.3
	16  Muscat	09  Muscat	50.1
	17  Bengaluru	10  Bengaluru	50.0
	18  Kuala Lumpur	11  Kuala Lumpur	49.6






03

Developing Tier

Overall

19		Mumbai
20		New Delhi
21		Istanbul
22		Budapest
23		Santiago
24		Bangkok
25		Jakarta
26		Ho Chi Minh City
27		Baku
28		São Paulo
29		Manila












30		Cairo
31		Cape Town
32		Minsk
33		Rio de Janeiro
34		Johannesburg
35		Almaty
36		Nairobi
37		Buenos Aires
38		Casablanca
39		Tunis
40		Karachi
41		Tashkent
42		Lagos

43		Algiers
44		Bishkek
45		Ulaanbaatar
46		Tehran
47		Addis Ababa
48		Caracas

04

Emerging Tier

Global South

12		Mumbai
13		New Delhi
14		Istanbul
		Budapest
15		Santiago
16		Bangkok
17		Jakarta
18		Ho Chi Minh City
19		Baku
20		São Paulo
21		Manila

22		Cairo
23		Cape Town
24		Minsk
25		Rio de Janeiro
26		Johannesburg
27		Almaty
28		Nairobi
29		Buenos Aires
30		Casablanca
31		Tunis
32		Karachi
33		Tashkent
34		Lagos

35		Algiers
36		Bishkek
37		Ulaanbaatar
38		Tehran
39		Addis Ababa
40		Caracas

05

Nascent Tier

Score

48.2
47.9
47.8
47.6
46.8
46.8
46.7
46.1
45.2
44.8
44.7
43.7
43.2
42.9
42.6
42.2
42.1
42.1
40.8
40.6
39.8
38.7
38.7
38.3
35.4
35.2
34.1
33.6
30.2
29.1

The Global South City Competitiveness Map

The Global South City Competitiveness Index Tiers by Score

Leading Tier

>55

These cities are global benchmarks in urban competitiveness. They sustain favorable economic conditions, maintain robust infrastructure, and offer high-quality business services making them magnets for global business, talent, and innovation.

Advanced Tier

50-54

These cities show well-rounded strengths across several dimensions, with enhanced business appeal. While individual pillars may vary, these cities enjoy robust economic conditions, solid infrastructure, and steadily advancing Talent and Livability.

Developing Tier

45-49

These cities occupy a middle position, with strong foundations in some areas but with room for progress. They are developing competitive advantages, with median performance across most pillars.

Emerging Tier

36-44

These cities are at a formative stage of building competitiveness. Foundational elements are in place, but performance is uneven across dimensions – a mix of strong and deficient pillars.

Nascent Tier

< 35

These cities are at the early stages of building a competitive urban environment. They face structural challenges across all three dimensions, requiring reforms, investment, and strategic focus to unlock their potential.



Building competitiveness in the Next Economy

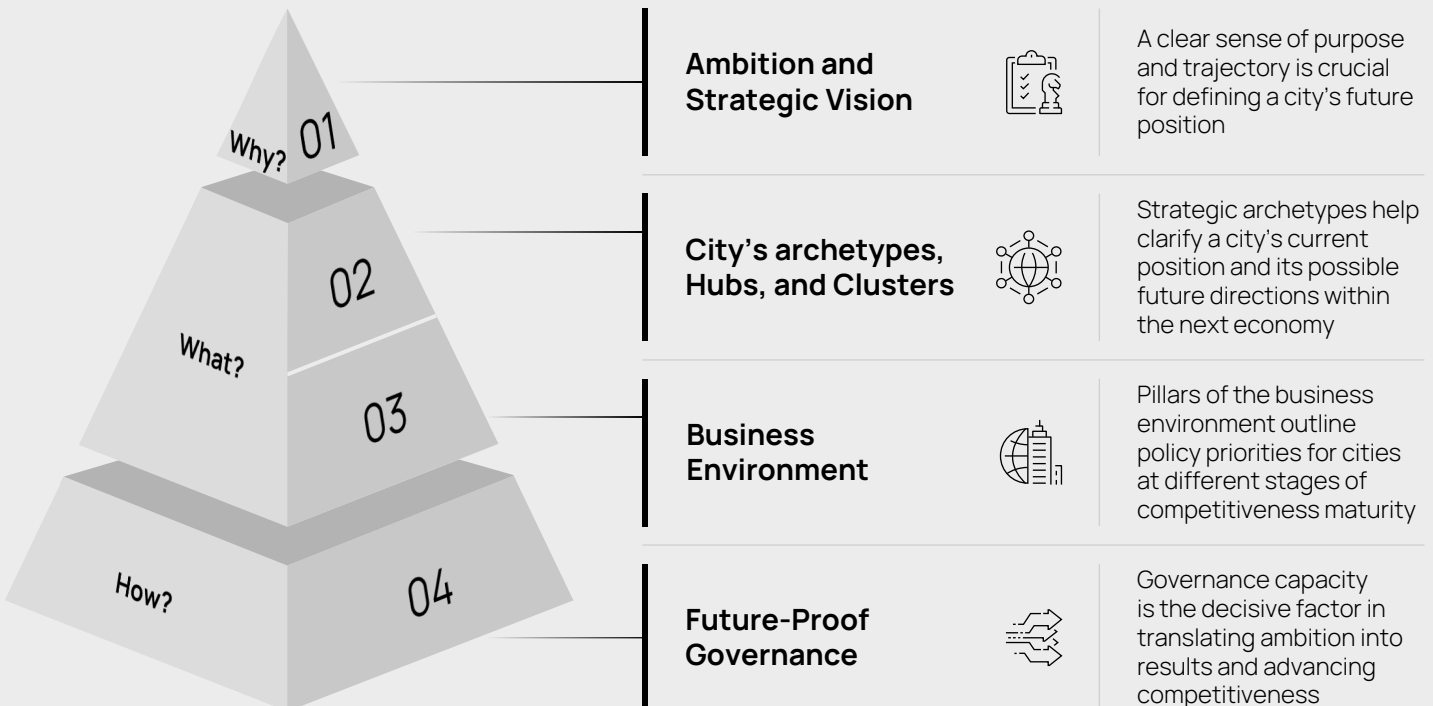
Competitiveness is no longer optional for large cities; it is a prerequisite for long-term prosperity and resilience. Building it requires clarity on three fundamental questions – **Why, What, and How?**

Cities need **ambition** to define their future standing within national, regional, and global systems. Without a clear sense of purpose, even the best-designed projects can become fragmented and short-term.

Competitiveness must be built on a dual foundation: **economic specialization** and an **enabling business environment**. Cities should foster productive hubs and clusters that drive growth while ensuring infrastructure and institutions that support business expansion and talent retention.

Success depends on **effective governance that turns vision into action**. This requires coordinating public, private, and civic stakeholders, aligning policies, budgets, and delivery mechanisms to ensure long-term adaptability and credibility.

Key Elements of Ambition-driven Strategies for Competitiveness and Transformation



Contributors

About the SuperSymmetry Institute (SSI)

SuperSymmetry Institute (SSI) is a collaborative platform bringing together policy experts, practitioners, and business leaders to address structural asymmetries between the Global South and the Global North and advance more balanced, resilient, and future-oriented development pathways.

This report was prepared under the SuperSymmetry Institute (SSI), reflecting the joint work of Eurasia Institute and ReState Foundation.

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Institutional Partners

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Regional Knowledge Partner

Institutional Partners contributed to the project within their respective areas of expertise. Overall accountability for the report rests with the project team.

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