Driving Urban Advantage in the Next Economy

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

Highlights

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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.

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

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

Several Global South cities have emerged as global competitiveness leaders.

Cities follow distinct competitiveness trajectories.

Uneven competitiveness remains a defining feature of the Global South.

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

Future-Proof Governance determines whether ambition delivers results.

Aligning economic priorities with spatial development accelerates competitiveness.

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.

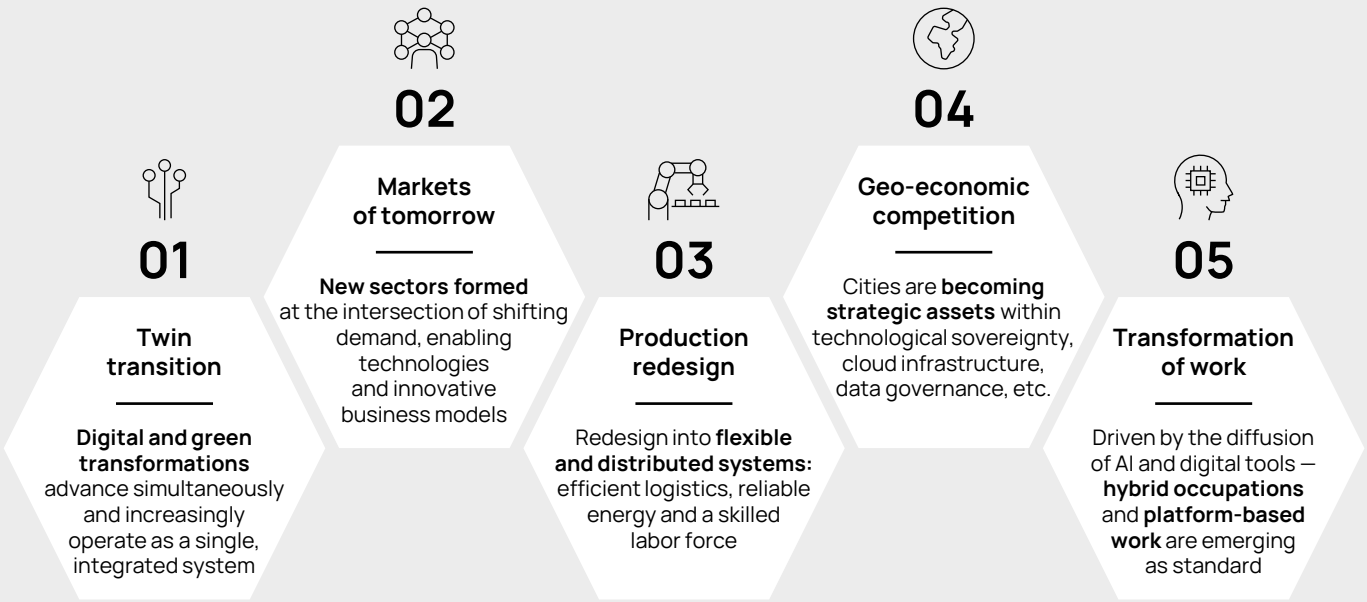
The Next Economy is emerging from these trends, characterized by **five interconnected attributes** — twin transition, markets of tomorrow, production redesign, geo-economic competition, and transformation of work — that are reshaping how value is created and how cities compete.

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

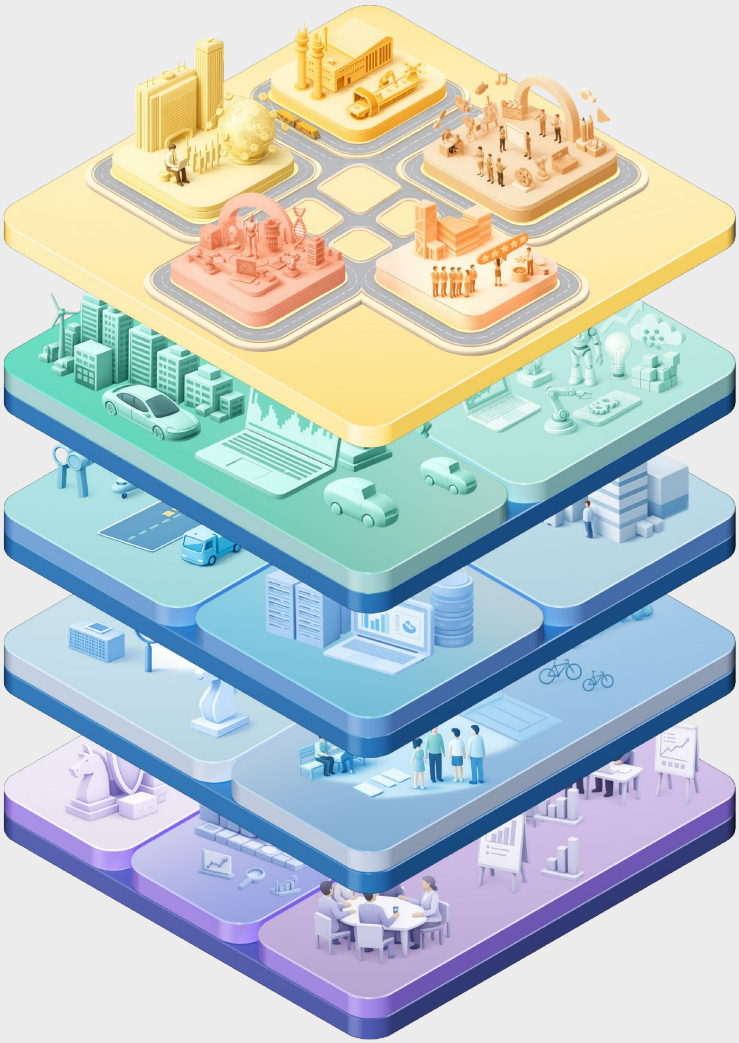
Urban competitiveness reflects a city's ability to create and sustain a business environment that drives economic activity, supports a favorable economic structure, and underpins long-term economic performance. The overall framework encompasses three interlinked layers — Urban Economic Hubs, Business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

City Competitiveness Framework

Urban Economic Hubs

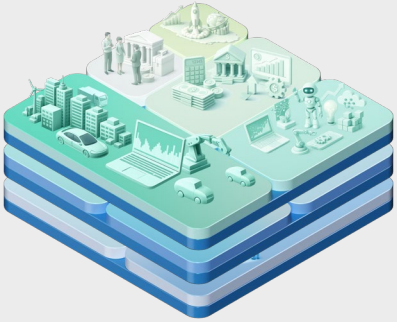
Business Environment

Future-Proof Governance

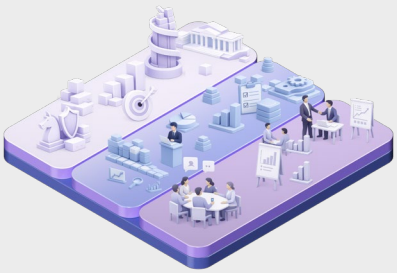


Together, these three levels are a powerful platform for diagnosing urban strengths and weaknesses, and for shaping strategies that respond to the demands of the Next Economy. They provide a common foundation for analysis and benchmarking.

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

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

Dimension	Pillar	Weight	
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.

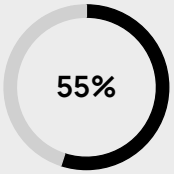
The Index developed through a **three-phase process** that integrates academic and applied research with statistical modeling and analysis. The methodology follows international standards for composite GS-CCI construction and draws on globally recognized practices.

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

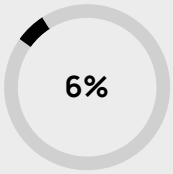


Survey Data

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

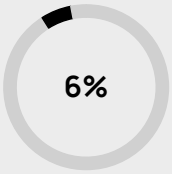
Big Data

Geographic, transportation mobility, web activity data



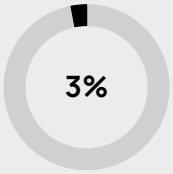
Social Listening

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

	Overall		Global South	Score
03 Developing Tier	19	Mumbai	12 Mumbai	48.2
	20	New Delhi	13 New Delhi	47.9
	21	Istanbul	14 Istanbul	47.8
	22	Budapest	Budapest	47.6
	23	Santiago	15 Santiago	46.8
	24	Bangkok	16 Bangkok	46.8
	25	Jakarta	17 Jakarta	46.7
	26	Ho Chi Minh City	18 Ho Chi Minh City	46.1
	27	Baku	19 Baku	45.2
	28	São Paulo	20 São Paulo	44.8
	29	Manila	21 Manila	44.7
04 Emerging Tier	30	Cairo	22 Cairo	43.7
	31	Cape Town	23 Cape Town	43.2
	32	Minsk	24 Minsk	42.9
	33	Rio de Janeiro	25 Rio de Janeiro	42.6
	34	Johannesburg	26 Johannesburg	42.2
	35	Almaty	27 Almaty	42.1
	36	Nairobi	28 Nairobi	42.1
	37	Buenos Aires	29 Buenos Aires	40.8
	38	Casablanca	30 Casablanca	40.6
	39	Tunis	31 Tunis	39.8
	40	Karachi	32 Karachi	38.7
	41	Tashkent	33 Tashkent	38.7
	42	Lagos	34 Lagos	38.3
05 Nascent Tier	43	Algiers	35 Algiers	35.4
	44	Bishkek	36 Bishkek	35.2
	45	Ulaanbaatar	37 Ulaanbaatar	34.1
	46	Tehran	38 Tehran	33.6
	47	Addis Ababa	39 Addis Ababa	30.2
	48	Caracas	40 Caracas	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

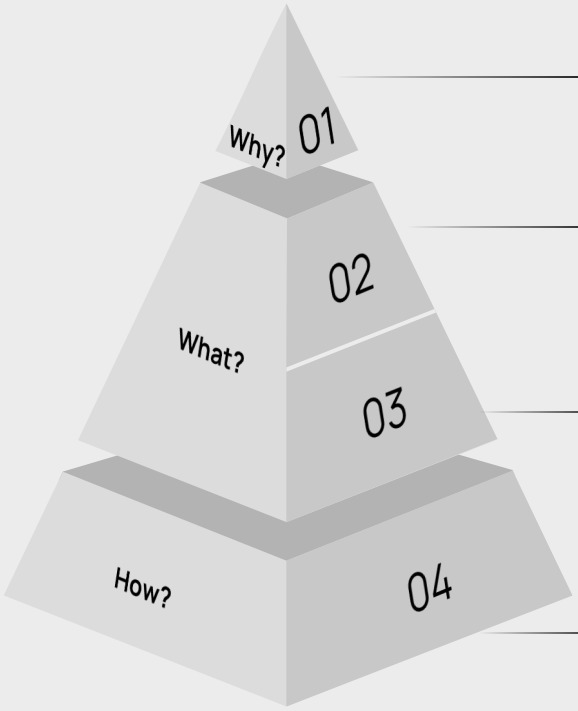
Competitiveness is no longer optional for large cities; it is a prerequisite for long-term prosperity and resilience. Building it requires clarity on three fundamental questions — **Why, What, and How?**

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



Ambition and Strategic Vision

A clear sense of purpose and trajectory is crucial for defining a city's future position

City's archetypes, Hubs, and Clusters

Strategic archetypes help clarify a city's current position and its possible future directions within the next economy

Business Environment as a City's Value Proposition

Pillars of the business environment outline policy priorities for cities at different stages of competitiveness maturity

Future-Proof Governance

Governance capacity is the decisive factor in translating ambition into results and advancing competitiveness

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.

Core Team

Alexey Prazdnichnykh

Project Lead

Katerina Kulkova

Research Associate

Anastasia Kalinina

Communication Lead

Acknowledgements

Senior Advisors

Roberto Alvarez

Executive Director, Global Federation of Competitiveness Councils (GFCC)

Leonardo Cavalli

Managing Partner, One Works

Roberto Crotti

Economist, Organisation for Economic Co-operation and Development (OECD)

Margareta Drzeniek-Hanouz

Managing Partner, Horizon Group

Former Lead Economist and Head of the Global Competitiveness Programme, World Economic Forum (WEF)

Mei Lin Fung

Co-founder, People-Centered Internet

Vice-Chair, United Nations AI for Good Steering Committee

Bryonie Guthrie

Manager, Strategic Foresight, World Economic Forum

Alexandre B. Hedjazi

Chair, UNECE—University of Geneva Center of Excellence on Smart Sustainable Cities, University of Geneva

Asset Issekeshev

Chairman, Higher Council of the Qaztech Alliance of Technology Companies, Kazakhstan

Former Mayor of Astana; Former Deputy Prime Minister — Minister of Industry and New Technologies, Kazakhstan

Amit Kapoor

Chair, Institute for Competitiveness, India

Donato De Rosa

Former Lead Economist, World Bank

Landry Signé

Senior Fellow, Africa Growth Initiative, Brookings Institution

Senior Advisors contributed expert insights and feedback during the preparation of this report. The content and conclusions of the report remain the responsibility of the project team.

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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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For additional information please contact Alexey Prazdnichnyh, the Project Lead,
at contact@supersymmetry.institute

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