

Global Cities: new priorities for a new world

2020 Global Cities Report

KEARNEY

As cities pick up the pieces and plan for life after COVID-19, we reveal how the pandemic has shattered the status quo, and outline the new challenges and priorities facing city leaders.

Executive summary

The 2020 Global Cities Report provides a snapshot of where cities stood as they entered the COVID-19 crisis. Incorporating the Global Cities Index (GCI) and Global Cities Outlook (GCO), this year’s results reveal intensifying competition for global status and future prospects in an increasingly fragmented and volatile environment.

Entrepreneurial cities on the rise

The most striking change in the GCI was Beijing’s rise to displace Hong Kong among the top five global cities, suggesting the impact of combining stability and growth with aggressive investments in human capital (see figure 1). Shanghai and San Francisco also made significant jumps, thanks in part to their scores on entrepreneurship and innovation, which now incorporate a new metric of the number of unicorn companies in a city. However, despite these surprises, those in the highest positions—New York, London, Paris, and Tokyo—retained the top four places. This enduring strength highlights the breadth of advantages needed to reach and stay at the top of the Index, and the self-reinforcing power of global city status.

Early signs of a global reordering

This year’s GCO paints a more dynamic picture (see figure 2 on page 2). While London maintained its top ranking in 2020, most cities rose or fell fairly dramatically in the Outlook’s rankings. One example is Toronto, which climbed nine spots to take second place. For many of the rising cities, long-term investments in governance and economics have begun to pay off. This is particularly true of cities in China and the Middle East, which are rapidly catching up with their European and North American peers.

Figure 1
2020 Global Cities Index
top 10

City	2019 Rank	2020 Rank	Δ '19-'20
New York	1	1	—
London	2	2	—
Paris	3	3	—
Tokyo	4	4	—
Beijing	9	5	+4
Hong Kong	5	6	−1
Los Angeles	7	7	—
Chicago	8	8	—
Singapore	6	9	−3
Washington, D.C.	10	10	—

Figure 2
2020 Global Cities Outlook
top 10

City	2019 Rank	2020 Rank	Δ '19-'20
London	1	1	—
Toronto	11	2	+9
Singapore	2	3	−1
Tokyo	6	4	+2
Paris	5	5	—
Munich	8	6	+2
Abu Dhabi	20	7	+13
Stockholm	10	8	+2
Amsterdam	4	9	−5
Dublin	9	10	−1

Thriving in a post-COVID future

Recognizing COVID-19 as a definitive turning point, we also outline its impact on global cities and the radically altered future they now face. The crisis has fueled a number of trends already creating tremendous strain on cities, from growing fiscal pressure and economic inequality to the effects of increasing deglobalization and environmental disruption. Meeting these challenges will require city leaders to reconsider many long-standing assumptions and priorities.

Our analysis suggests that to emerge from the current crisis stronger and more resilient, city leaders will need to reimagine what is next for their cities. In particular, they must drive progress in the following three key areas:

- **Urban value creation.** To remain relevant and competitive in a post-pandemic world, global cities will have to deepen their focus on creating public value—that is, value centered on the common good across all sectors and segments of society. By doing this, city leaders have an opportunity to reverse trends that have undermined cities’ stability, equity, and value creation for decades.

- **Global city connectedness.** The international flows of goods, ideas, and people that are so central to global cities are under threat from both the near-term fallout from the pandemic and the long-term trend away from a globalized international order. To sustain these vital flows in increasingly challenging conditions, city leaders must revitalize and expand their cities’ global connectedness in a variety of ways.
- **The transformation of urban space.** Finally, city leaders have a responsibility to address the many challenges tied to physical space that have been so starkly revealed by the pandemic. They range from how to restart economies safely while complying with the need for social distancing, to addressing the environmental inequalities linked to poor health outcomes in lower-income neighborhoods. The overall aim should be to reimagine city planning in a way that makes the lived environment more sustainable, resilient, and inclusive.

For each of these areas, we outline specific priorities for action by which city leaders can drive immediate recovery in ways that will enable inclusive, long-term progress.

Different times, a different perspective

This edition of the Global Cities Report, now in its 10th year, comes in the wake of one of the most disruptive global emergencies in history: the COVID-19 pandemic. The crisis has disrupted the entire operating environment to a degree that was previously unimaginable, and its impact has been particularly severe in our largest urban centers, calling into question their current and future status.

For this reason, our 2020 report is a departure from the norm. As usual, we present the Global Cities Index (GCI) and Global Cities Outlook (GCO), which together provide a comprehensive analysis of cities' positions and prospects. Based on data captured largely **before** the virus struck, this year's GCI and GCO paint a picture of where cities stood and where they were headed in a recent—but very different—past. With city rankings not yet incorporating the observed effects of the crisis—or the measures taken in response to it—this year's report gives city leaders a reference point for assessing where they have come from as they prepare for a very different future.

As the pandemic heads toward its first anniversary, we also identify the major impacts we have observed on global cities so far and outline a series of trends and challenges that decision-makers will have to grapple with in response. Finally, we offer our perspective on three vital areas in which leaders must drive innovative progress. This includes the priority actions that will be necessary to ensure that the cities they govern continue to generate their unique economic, social, and cultural value—and indeed expand it.

This year's report gives city leaders a reference point for assessing where they have come from as they prepare for a very different future.

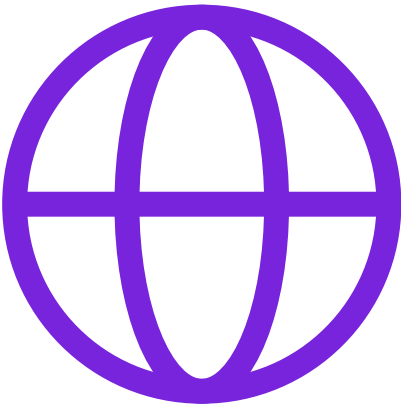
The most recent rankings include

151 cities

across all continents, compared to

130 in 2019

reflecting the increasing importance of emerging geographies such as the Middle East and Central Asia.



What makes a city a global city?

The GCI assesses how globally engaged cities are across five dimensions: business activity, human capital, information exchange, cultural experience, and political engagement. The GCO, on the other hand, examines those creating the conditions for **future** status as major global players. This analysis covers four dimensions—personal well-being, economics, innovation, and governance—which are key determinants of a city’s ability to attract talented human capital, generate economic growth, increase competitiveness, and ensure stability and security, respectively.

The most recent rankings include 151 cities across all continents, compared to 130 in 2019, reflecting the increasing importance of emerging geographies such as the Middle East, China, and Central Asia.

New metrics to reflect changing global dynamics

As the world around us continues to evolve, so do the characteristics of global cities, and the 2020 GCI includes two new metrics:

- The number of unicorn companies (privately held start-up companies valued at more than \$1 billion): We can no longer consider a city global if it is not at the forefront of entrepreneurship and innovation. As a measure of that characteristic, this metric is now included within the Business Activity dimension, highlighting cities that thrive on pioneering residents.
- The number of medical universities: As COVID-19 has shown, the well-being of residents, and access to cutting-edge medical knowledge and technologies, can make or break a city. To account for this, medical universities are now included under the Human Capital dimension as a measure of how globally connected its healthcare system is.

Photo by Lori Choules
Kearney



The 2020 GCI and GCO: cities on the verge of disruption

Global Cities Index results

For the fourth year in a row, New York City topped the Global Cities Index, followed by London, Paris, and Tokyo (see figure 3 on page 6). The consistency of these results highlights the wide range of positive attributes a city must have to reach the top of the Index, and the difficulty of building such a broad platform of strengths. It also shows that for those cities able to do so, global status has so far been self-reinforcing. Even in a year marked by relatively low levels of business activity, New York City's momentum across all metrics enabled the city to maintain its number 1 position.

A major shift at the top of the rankings, however, was Beijing unseating Hong Kong from its long-held top five position, which could prove to be a sign of further changes to come. While Beijing's strong economic growth and human capital investments paid off, the political chaos in Hong Kong undoubtedly dampened its performance across all dimensions, with significant drops in business activity, information exchange, and cultural experience.

Four out of five stay steady at the top

New York City widened its lead over other cities on the Index slightly, receiving its highest score in human capital due to strong performance in number of international schools, international student population, and the new medical universities metric.

London, while still in second place, has had a falling score on the Index since 2017. Though the sharp drop-off in economic activity predicted after the Brexit vote has yet to materialize, so too have any new rules surrounding trade, which will not become clear until at least the end of this year.

Paris's consistent performance in information exchange (in which it leads the ranking), cultural experience, and political engagement ensured the city's solid hold on the number 3 position this year.

Tokyo continued its slow but steady improvement on the Index, demonstrating strong year-on-year performance in the business activity dimension. What will happen in the aftermath of Prime Minister Shinzo Abe's exit from government remains to be seen.

Finally, **Beijing's** new position reflects higher scores across most metrics. It ranked second in the business activity dimension, partly thanks to a number 2 spot on the new unicorn companies metric. Investments in education and the city's rising status as a cultural center also led to a large jump in the human capital dimension.

Entrepreneurship makes the difference

With the addition of the new unicorn companies metric, cities focused on entrepreneurship ranked much higher than in the most recent edition of the index. **San Francisco** was unsurprisingly the biggest beneficiary, leaping 9 places from 22 to 13 in the overall rankings. **Shanghai** also made an impressive jump of 7 spots to 12, **Munich** rose from 32 to 24, and **Seattle** gained 2 places, ranking at 45.

Ironically, healthcare reverses previous gains

Conversely, the inclusion of medical universities as a new metric caused several cities' overall performance to decline. In the human capital dimension, **Istanbul** dropped from 20 to 38, **Buenos Aires** plummeted from 12 to 31, and **Prague** slipped from 61 to 82.

Figure 3

The top 30 cities in the Global Cities Index

City	2020 Rank	2019 Rank	2018 Rank	2017 Rank	2016 Rank	2015 Rank	Δ '19-'20	
New York	1	1	1	1	2	1	—	
London	2	2	2	2	1	2	—	
Paris	3	3	3	3	3	3	—	
Tokyo	4	4	4	4	4	4	—	
Beijing	5	9	9	9	9	9	+4	↑
Hong Kong	6	5	5	5	5	5	-1	↓
Los Angeles	7	7	6	8	6	6	—	
Chicago	8	8	8	7	7	7	—	
Singapore	9	6	7	6	8	8	-3	↓
Washington, D.C.	10	10	11	10	10	10	—	
Sydney	11	11	15	17	14	15	—	
Shanghai	12	19	19	19	20	21	+7	↑
San Francisco	13	22	20	23	23	22	+9	↑
Brussels	14	12	10	11	12	12	-2	↓
Berlin	15	14	16	14	16	17	-1	↓
Madrid	16	15	13	13	13	16	-1	↓
Seoul	17	13	12	12	11	11	-4	↓
Melbourne	18	16	17	15	15	19	-2	↓
Toronto	19	17	18	16	17	13	-2	↓
Moscow	20	18	14	18	18	14	-2	↓
Boston	21	21	24	21	24	23	—	
Vienna	22	25	21	20	19	18	+3	↑
Amsterdam	23	20	22	22	22	25	-3	↓
Munich	24	32	32	36	33	38	+8	↑
Buenos Aires	25	24	25	26	21	20	-1	↓
Barcelona	26	23	23	24	26	27	-3	↓
Dubai	27	27	28	28	28	26	—	
Frankfurt	28	28	29	29	29	28	—	
Montreal	29	29	27	27	27	24	—	
Miami	30	31	30	30	30	31	+1	↑

Source: Kearney 2020 Global Cities Report

Figure 4
Leading cities across the GCI metrics

2020 Global Cities Index leaders

Global City Index leaders by dimensions				
Business activity New York	Human capital New York	Information exchange Paris	Cultural experience London	Political engagement Brussels
Global Cities Index leaders by metric				
<ul style="list-style-type: none">— Fortune 500 Beijing— Top global services firms London*— Capital markets New York— Air freight Hong Kong— Sea freight Shanghai— ICCA conferences Paris— Unicorn companies** San Francisco	<ul style="list-style-type: none">— Foreign-born population New York— Top universities Boston— Population with tertiary degree Tokyo— International student population Sydney*— Number of international schools Hong Kong— Medical universities** London	<ul style="list-style-type: none">— Access to TV news Munich*, Düsseldorf*, Frankfurt*, Berlin*— News agency bureaus London, New York— Broadband subscribers Geneva, Zurich— Freedom of expression Oslo*— Online presence Singapore	<ul style="list-style-type: none">— Museums Moscow— Visual and performing arts Vienna*— Sporting events Los Angeles*— International travelers London— Culinary offerings Paris*— Sister cities Saint Petersburg	<ul style="list-style-type: none">— Embassies and consulates Brussels— Think tanks Washington, D.C.— International organizations Geneva— Political conferences Brussels— Local institutions with global reach Paris

* indicates new leaders in 2020
** indicates new elements in GCI 2020
Source: Kearney 2020 Global Cities Report

Diverse leaders across metrics

Across the GCI’s 29 metrics, 24 different cities ranked first. Despite this diversity, the top cities ranked highly across all metrics, while many others only found success in a handful. In particular, the top three cities on the Index overall stood out across metrics, with London achieving the highest rating across four, while New York and Paris each landed at the top in three (see figure 4).

Global Cities Outlook results

Having determined the year’s global leaders in the GCI, the GCO identifies cities on the rise—those creating the right conditions for future global status (see figure 5 on page 8). This time, London maintained its top ranking, but from there all bets were off. Toronto jumped an impressive 9 places to the number 2 spot, driven by a large upswing in innovation and continued strong governance. Tokyo’s consistently high scores in personal well-being took it up 2 places to number 4, and Abu Dhabi jumped 13 places to number 7, driven by long-term investments in economic performance and diversification. The much more dynamic results of the GCO, in comparison to the GCI, reveal the fierce competition between global cities to advance their future prospects.

Figure 5
The top 10 saw significant changes, but London kept the top spot

City	2020 Rank	2019 Rank	2018 Rank	2017 Rank	2016 Rank	2015 Rank	Δ '19–'20	
London	1	1	3	4	3	2	0	
Toronto	2	11	12	20	22	20	+9	↑
Singapore	3	2	5	11	16	10	−1	↓
Tokyo	4	6	14	23	18	19	+2	↑
Paris	5	5	4	3	11	15	0	
Munich	6	8	7	7	6	5	+2	↑
Abu Dhabi	7	20	50	52	52	48	+13	↑
Stockholm	8	10	11	9	7	11	+2	↑
Amsterdam	9	4	6	16	14	17	−5	↓
Dublin	10	9	33	40	33	21	−1	↓
San Francisco	11	3	1	1	1	1	−8	↓
Sydney	12	13	19	13	9	6	+1	↑
Montreal	13	23	21	32	26	27	+10	↑
Berlin	14	16	18	18	17	14	+2	↑
Boston	15	7	8	5	4	3	−8	↓
Geneva	16	12	16	14	13	8	−4	↓
Luxembourg	17	—	—	—	—	—	—	
Dubai	18	32	42	46	37	32	+14	↑
Melbourne	19	14	10	6	10	9	−5	↓
Copenhagen	20	17	23	21	20	18	−3	↓
Vienna	21	18	25	29	32	39	−3	↓
Zurich	22	15	13	12	8	4	−7	↓
Chicago	23	38	15	15	15	16	+15	↑
Perth	24	—	—	—	—	—	—	
Vancouver	25	19	17	24	25	23	−6	↓
Taipei	26	25	38	44	28	28	−1	↓
New York	27	24	2	2	2	13	−3	↓
Düsseldorf	28	26	27	22	27	26	−2	↓
Brussels	29	27	22	28	21	22	−2	↓
Minneapolis	30	—	—	—	—	—	—	

Source: Kearney 2020 Global Cities Report

Economics and innovation lead the way

Cities that saw a rise in their outlook performance mainly improved in the areas of innovation and economics, where long-term investments were beginning to show results. [Abu Dhabi and Dubai topped the economics metric in infrastructure](#), thanks to their openness to the private sector and robust engagement in public-private partnerships. Combined with increases in GDP per capita, FDI inflows, and foreign investments, this took **Abu Dhabi** to seventh place overall, and **Dubai** from 32 to 18. Others who gained ground include **Chicago**, thanks to increased private investments and university-sponsored incubators; **Madrid**, which jumped 14 places with improved scores in patents and FDI inflows; and **Shenzhen**, where patents and university-sponsored incubators also saw an uptick.

Precarious US positions

Though several US cities were prominent in the GCI, the GCO suggests that their outlook is uncertain, with most experiencing a drop across the dimensions related to personal well-being, economics, and governance. **San Francisco** and **Boston**, formerly two leading cities on the GCO, both lost ground, going from 3 to 11 and 7 to 15 respectively. **New York City** dropped out of the top 25, **Washington D.C.** and **Houston** fell from the top 30, and **Los Angeles**, **Philadelphia**, and **Miami** exited the top 50. It's perhaps no surprise that these shifts occurred in parallel with the US's withdrawal from international agreements such as the Paris Climate Accord and Trans-Pacific Partnership (TPP), indicating that American city leaders will face heightened challenges as they seek to reap the benefits of international flows of individuals, goods, and capital. In addition, a spring and summer of urban unrest across the United States has highlighted citizen dissatisfaction with many dimensions of city governance, and pressure on local governments is at an all-time high.

Pronounced regional trends

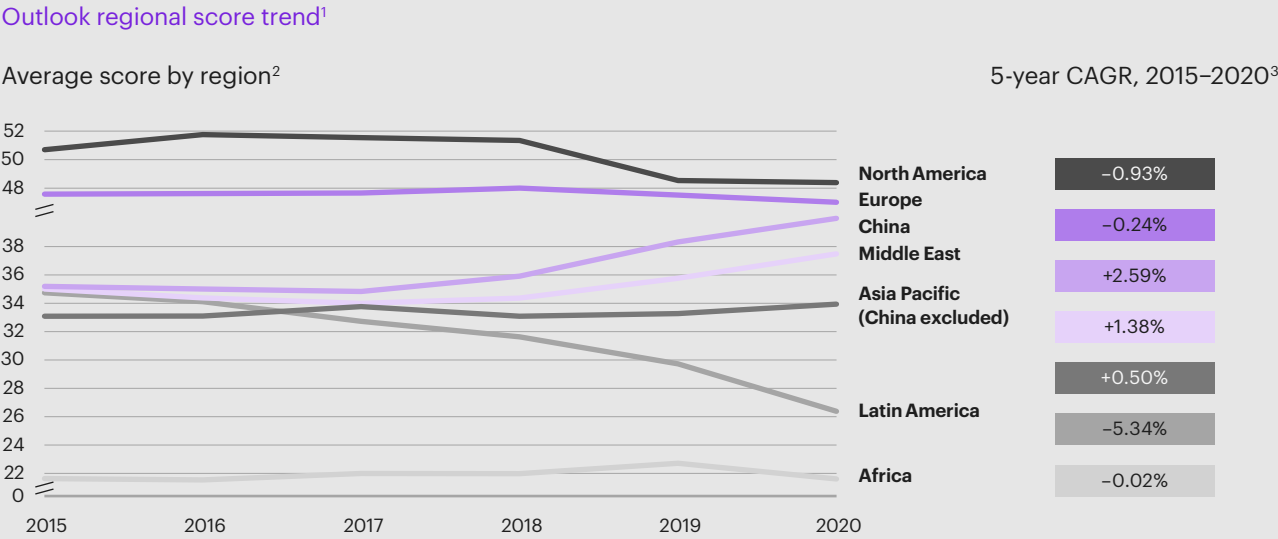
Divergent regional trends emerged in this year's findings: cities in China and the Middle East made a rapid march on those in North America and Europe, even as North America looked poised to overtake Europe on the business activity dimension (see figure 6 on page 10). China made significant improvements in its personal well-being, innovation, and governance scores, while the Middle East's marked advance was led by the strong emphasis on national transformation and economic diversification in Gulf countries, as well as by continued strong performance in Israel. In Latin American cities, decreasing scores across every dimension drove a pronounced and continued decline, with results in innovation particularly poor. It seems that, despite government efforts, the economic benefits of the region's stunning pace of urbanization [have yet to be well distributed](#). Elsewhere, APAC and Africa remained relatively stable.

New leaders across each dimension

Ten cities took the lead across the GCO's 13 metrics, but this year new leaders emerged in each dimension, illustrating the sheer effort and determination across the globe and in cities at all stages of development as they attempted to improve their standing (see figure 7 on page 10).

The much more dynamic results of the GCO reveal the fierce competition between global cities to advance their future prospects.

Figure 6
In the overall Outlook, Chinese cities are closing the gap, while North America remains the leading region



¹ To be able to compare values over years, all index scores were adjusted to 2015 overall average.
² Included cities in the analysis are the same from 2015 to 2020.
³ Compound annual growth rate
Source: Kearney 2020 Global Cities Report

Figure 7
Leading cities across the GCO metrics

2020 Global Cities Outlook leaders

Global City Outlook leaders by dimensions			
Personal well-being Nagoya*	Economics Abu Dhabi*	Innovation Beijing*	Governance Stockholm*
Global Cities Outlook leaders by metric			
— Stability and security Tokyo, Nagoya, Osaka	— Infrastructure Dubai, Abu Dhabi*	— Patents per capita Minneapolis*	— Quality of bureaucracy Toronto*, Montreal*, Vancouver*
— Healthcare evolution Moscow*	— GDP per capita Abu Dhabi*	— Private investments Toronto*	— Ease of doing business Almaty*, Nur-Sultan*
— GINI coefficient index Prague	— FDI inflow London*	— University-sponsored incubators Moscow	— Transparency Vienna*
— Environmental performance Luxembourg*			

*Indicates new leaders in 2020
Source: Kearney 2020 Global Cities Report

The COVID effect

Depending on where you are in the world, we're now anywhere from six months to almost a year into the COVID-19 pandemic, and the cities included in the 2020 GCI and GCO are at various stages of response and recovery. As they have begun to emerge from the depths of the crisis, the future of cities has become the subject of intense debate. Indeed, with pundits feverishly suggesting that the [pandemic is "killing the attraction of megacities" and that they are "losing their allure,"](#) many have begun to question whether [the city can survive as a primary locus of economic and social activity](#). While these reactions are extreme, so too are the impacts global cities have already witnessed.

Emptied city centers

There's no denying that many cities are much quieter places than before. Analysis from the *New York Times* found that roughly 5 percent of the city's residents (mostly those in wealthy neighborhoods) [left it in the early months of the emergency](#), while cell phone data from the Paris metro area shows [the population shrank by nearly 20 percent](#). And as millions have abandoned shared working spaces for their living and dining rooms, the future of the office has become increasingly unclear. A recent [survey from Gartner](#) reports that 82 percent of company leaders intend to permit remote working of some kind as employees return to work, and nearly half (47 percent) will allow it full time. In turn, house prices have been affected: according to the [housing website Zillow](#), listings in Manhattan have dropped by 4.2 percent compared with 2019, while in San Francisco prices are down 4.9 percent.

Of course, the urban impacts of COVID-19 go far beyond residents' new behaviors and ways of working. International traveler numbers dropped off to almost zero for a period of time, and the International Air Transport Association (IATA) has forecast that this year's [total global passenger numbers will be down 55 percent](#) from 2019. In cities where tourism or cultural and performance events typically contribute to economic performance, this has proven particularly devastating. In other instances, for example in **Tokyo** and **Dubai**, the major boosts expected from global events (the Summer 2020 Olympics and Expo 2020) never materialized.

For all cities, the full ramifications of the pandemic will only be understood in the coming months and years, but key questions are already being raised. If jobs become less directly linked to cities, and increasingly move online or to the suburbs, will residents follow? What will become of once vibrant city centers if they are no longer considered safe to host major cultural events or as centers of employment? What does the future of consumer spending look like if cities are drained of international visitors and daily foot traffic? And what will be the extent of the economic "scar tissue" left behind?

While these developments pose significant challenges in their own right, they are by no means the only forces of change facing city leaders, as we will now explore. The net effect of these structural shifts, with the pandemic acting as an accelerant, is a new level of pressure on cities to evolve rapidly, or risk losing relevance on the world stage.

The net effect of these structural shifts is a new level of pressure on cities to evolve rapidly.

Under pressure: new challenges for global cities

Taking into account the cumulative effects of the pandemic and other influencing factors, we see the major topics of concern for city leaders now falling into five categories, all of which have added urgency and complexity to the task of formulating an effective response.

- **The cost of proximity.** First, COVID-19 has altered the actual and perceived risk of precisely the kind of physical proximity and demographic concentration that defines cities. At the same time, as virtual interaction and remote working models become more viable, the balance of costs and benefits associated with urban life for residents and companies alike has shifted.
- **Fiscal breaking points.** The economic dislocation wrought by the crisis has also placed tremendous budgetary pressure on many cities, adding to debt burdens that could constrain the power of city and local governments for years in many cases.
- **Global fragmentation.** With trends toward localization and economic nationalism already gaining momentum before the virus began its deadly assault, the crisis has brought on a whole new set of barriers to global flows of commerce, investment, people, ideas, data, and technology. The premiums on self-sufficiency and strategic autonomy are now at an all-time high—as we saw when the need for medical equipment and resources soared in the face of broken supply chains and severe shortages. As international cooperation erodes, several of the central means by which global cities create value for their citizens, communities, and companies are also crumbling.
- **Urban divides.** Cities are also facing a set of longer-term challenges made more complex by the pandemic. First is the persistent issue of social and economic inequality, now exacerbated by levels of unemployment not seen in many parts of the world for some 70 years. With automation increasingly rearing its head, cities—traditionally centers of economic opportunity—will also have to wrestle with its impact on employment, education, and training programs.
- **Environmental pressure.** Finally, and for many cities the most pressing topic, is the ever-growing peril of climate change. Pollution, water scarcity, and exposure to increasingly frequent extreme weather events will demand that cities find new ways to become secure, resilient, and healthy places to live and work.

The choices cities make today will shape their trajectories for decades to come—and there's limited time to deliberate over the right course of action. However, time and again, cities ravaged by disease, disaster, and discord have survived. While the steep decline of individual cities indicates that no urban center should consider itself immune to these threats, the steady historic increase in urbanization is evidence of their irreplaceable value. For example, although the Black Death killed some 40 percent of Europe's population, cities had, on average, [returned to previous population levels within around 200 years](#).

Creating what's next

What is already abundantly clear in the emerging reality is that previous status will not be enough to secure continued global prominence. Instead, city leaders will need to make strategic choices and investments, which are likely to look very different from years past, if they are to emerge stronger and more resilient. While each city will necessarily adapt in its own way to cater for variations in geography, demography, and industrial strength—among other factors—we see the need for leaders to drive innovative progress in three vital areas:

- **Urban value creation.** To structurally renew how cities create value for residents, businesses, and communities
- **Global city connectedness.** To find new means of securing global flows of trade, investment, ideas, and people in a fragmented world
- **The transformation of urban space.** To reimagine urban planning, using physical space and technology to make the environment more sustainable, resilient, and inclusive.



The future of urban value creation

Cities play a central role in advancing human progress and accelerating economic growth. At the core of their power are the benefits that emerge from clustering diverse groups of individuals, organizations, and resources—also known as **economies of agglomeration**. In cities, human and financial capital are concentrated, infrastructure is readily accessible, and deep specialization is possible, all of which enhance productivity. [Innovation is also fueled by this proximity](#), and the ways in which it facilitates flow and exchange of ideas and gives residents a wide array of opportunities for participation, engagement, and commerce. To the extent that these benefits outweigh the costs of city living—such as higher rents, congestion, and other inconveniences—cities create value in ways that can't be recreated elsewhere. However, their ability to do so is now in jeopardy. This is particularly true for global cities.

Global cities generate unique value thanks to three fundamental attributes. First, they are deeply embedded in global networks, the significance of which we address in more detail in the next section. Second, they are microcosms of the world in all its diversity. Third, they hold a level of global influence that enables citizens and businesses to make an impact far beyond the city itself. These characteristics now represent a double-edged sword. On the one hand, global cities are more exposed to current conditions because of their dependence on international flows and connections. On the other hand, they are in a position to rebound more quickly once international commerce regains momentum. For example, during the economic recovery from Europe's Black Death, [cities with better land and "trade potential"](#) were able to become even more productive. Today, as deglobalization takes a deeper hold, the value of their far-reaching connections and resources is actually likely to increase as these links become more scarce.

Requirements and actions for city leaders

To remain relevant and competitive, global cities must not only renew but expand upon their unique value propositions—or their specific offering that attracts residents and businesses. This will require a deeper focus on creating public value—that is, [value centered on the common good](#). In doing so, leaders have the opportunity to reverse trends that have undermined the stability, equity, and value creation possibilities of cities for decades. [These trends include](#) the swing toward short-term, reactive decision-making at the expense of long-term vision and investment, the capture of policy processes by interest groups, public administrations driven by personal agendas, and the tendency to consider value in purely financial terms. Given the openness to change that the current crisis has generated, there is now a rare chance to make the shift from fixing near-term problems to creating long-lasting public value. For example, by removing some of the inequalities exposed by the pandemic through investment in the physical environment, city leaders can help residents and businesses now, while creating jobs and other opportunities for the future.

Specific actions include:

- **Redesigning the urban value proposition.** Rather than trying to return cities to the way they were, city leaders must now focus on the future they want to build. The first step is for public officials, residents, and local businesses to candidly assess the current situation, identifying immediate problems and long-term strategic challenges, and identifying the trends that will most affect the city. Based on this assessment, city leaders must drive a process of collaborative innovation to redesign the city's value proposition in ways that are robust with respect to future uncertainty and compellingly reflective of the interests and aspirations of all stakeholders. With a shared vision established, and the size and scale of the task determined, challenges can be prioritized and an action plan developed. If this effort is genuine, practical, and transparent, commitment, investment, and momentum will follow.
- **Investing in future-oriented recovery.** While there is no doubt that immediate public support is required to get citizens, businesses, and communities back on their feet, the large-scale, ad hoc relief efforts that have prevailed throughout 2020 are not sustainable, nor are they sufficient to achieve full recovery in the months and years ahead. In addition, with previous cases of emergency economic relief having been accused of benefitting the few at the expense of the many, the entire topic is now under heightened scrutiny.

While conditional recovery aid is becoming more common, it can often be, in many ways, punitive and past-oriented. Now, rather than focusing on past behaviors, recovery plans and programs should focus on the future, and align the conditions for relief with cities' long-term strategic goals in ways that benefit society as a whole. Given the constraints they are under, city leaders will need to determine which businesses, sectors, or mini clusters face the most severe threat, and how they fit into the city's future value proposition. Support programs should be tied to business practices or models that steer toward this, while providing transition support to those that do not.

- **Creating markets that generate public value.**

While the central role markets play in value creation is well understood, government's role in building markets that directly address public challenges in ways that create both public and private value is often overlooked. With resources and budgets under duress, city leaders will have to look for [opportunities to fulfill this vital function](#) wherever they can. Doing so will require collaborative input from all stakeholder groups to come up with new ideas to tackle the city's most urgent needs and significant long-term challenges. Once these have been prioritized in line with the city's future value proposition, city leaders, in partnership with the private sector, can design markets to address them.

- **Fostering civic capital.** Restoring trust—among residents and between them and institutions—is another priority. This plays a crucial role in building [civic capital](#)—the values and beliefs that enable cooperation among societies, which has been proven to boost economic performance. A recent study found that exposure to epidemics [reduces confidence in political institutions](#) and leaders, especially among the 18 to 25 age group—a fact that highlights the urgency of the need to build civic capital. Among the wide range of evidence-based approaches to building civic capital are proactively cultivating open discussion and ensuring decision-making processes are transparent and inclusive. Technology can also help: tools such as digital ledger technologies are designed to build trust in electronic transactions, while online reputation systems add credibility to shared social platforms and communities. By integrating a focus on civic capital into the city's value creation strategy, leaders can accelerate progress by unleashing the power of trust and cooperation.

Ensuring global connectedness

As we have established, international linkages are the lifeblood of global cities, constantly revitalizing and replenishing their resources. Yet since 2008, [the world has been on a path of “slowbalization,”](#) with international trade on the retreat for the first time since World War II. COVID-19 has dramatically accelerated this trend and diminished the cross-border flow of people. If multilateral cooperation continues to deteriorate, the very connections global cities rely on, which are central to economic performance and the ability to respond in times of crisis, will be increasingly threatened. What’s more, the pandemic has made it abundantly clear that cities will continue to be on the front lines when large-scale disruptions strike, leaving city leaders to drive the local response—often with tight resource constraints and uncertain national support. As a result, protecting cities’ global connectedness is vital if they are to combat their most significant challenges and create public value in a de-globalizing world.

The pandemic has made it clear that cities will continue to be on the front lines when large-scale disruptions strike.



Photo by Mauricio Zuazua
Kearney

Requirements and actions for city leaders

A first requirement is ensuring the continuity of the existing international networks and flows from which cities benefit, including the passage of goods, ideas, and people. In some cases, these will look and feel different, at least in the near term, having been altered to fit a new physically distant reality. Cities must also remain accommodating and attractive places to live and work for potential residents from all backgrounds, which means preserving their distinct local character, and giving careful consideration to the physical layout, which we explore further in the next section. Finally, many modern threats including COVID-19, climate change, and mass migration have a universal reach, but impact different locations in different ways, and at different times. This shows the importance of maintaining global dialogue and influence if city and local leaders are to advocate effectively for their own constituencies, have a say in crucial decisions, and gain access to broader support when crisis strikes.

To make progress in this area, city leaders should focus on:

Deepening engagement in global networks.

Becoming more deeply embedded in global city networks is perhaps the most practical and pragmatic way for cities to maintain essential global links. While there are a variety of different networks in terms of primary objectives, they all aim to enable city leaders to coordinate on important topics and drive change in their local contexts. Two primary types of networks are most valuable for global city leaders. **Data and best-practice sharing networks** center on pooling knowledge and experiences, sometimes by creating a dialogue on a specific topic, and exchanging insights and practices related to common challenges. This approach can prove incredibly flexible in times of need: for example, the C40 Cities network is committed to addressing climate change, however earlier this year it changed tack and [established a COVID-19 recovery task force](#). Sharing data can be even more powerful. [The European Virus Archive](#) enabled scientists to quickly identify the coronavirus as one of the SARS family and develop a way to detect it in patient samples. As cities become smarter and more digitally enabled, they will be even better equipped to find global solutions that can be applied in their own areas. Elsewhere, **global advocacy networks** amplify important city-level issues that can only be solved with broader input, for example where city leaders lack the political authority to make necessary decisions. The ICLEI (Local Governments for Sustainability) is one such city network. It and other networks like it have access to decision-makers at a range of international authorities and organizations such as the United Nations, giving cities a voice they

would otherwise lack at a global level. This enables city leaders to help garner global-level resources for challenges of a global scale that are experienced at a local level—from pandemic outbreaks to extreme weather events.

Forging international economic partnerships.

Complementary economic partnerships between cities also deliver mutual advantages that augment traditional ways of generating economic value. Rather than traditional sister city relationships, which tend to be bound by political or cultural ties, [partnerships based on economic well-being](#) can help cities develop new specializations, spark market opportunities, attract foreign investment, support industry collaboration, and become more visible on the world stage, even where national flows are faltering around them. One example is the so-called trade and logistics corridor between Atlanta and Amsterdam. [By sharing data and giving one another's cargo shipments priority](#) between Europe and parts of the US, these major coordination hubs aim to improve supply chain operations and efficiency, and gain further economic advantage. Arrangements such as these open up partner cities as gateways for foreign investment, supporting key local industries and workers, and boost their standing in global markets and industry value chains. However, they have to be carefully considered in the context of broader economic strategies. Partnership candidates must be rigorously analyzed for compatibility to make sure both parties benefit, any agreements and economic allowances must comply with national regulations, and once established, partnerships need continuous monitoring to make certain economic goals are met.

Guiding the transformation of urban space

Major events and disruptions have a habit of leaving their mark on our physical environment, [and cities are no exception](#): New York City's Central Park was designed to serve as "urban lungs" after it was ravaged by disease in the early 1800s, while the later introduction of London's innovative sewage drainage and water purification systems came courtesy of a cholera outbreak. More recently, the SARS pandemic spurred Singapore and Seoul to invest in digital contact tracing systems, which have been used again to great effect in combating the spread of COVID-19. Again and again, we redesign our cities when new threats reveal their vulnerabilities.

As we have seen, the latest pandemic has triggered widespread changes in behavior and accelerated several pre-existing urban trends. People are spending [more time online](#) than ever, and [remote working looks set to stay](#). The untethering of work from the office has led some to worry about the suburban sprawl that city planners have spent so long combatting. However, it seems that the idea of moving to the suburbs is already souring. While only 60 percent of US citizens reported that they wanted to continue living in the city in May's Harris Poll, by July this had [jumped back up to 74 percent](#).

The COVID experience has also highlighted some of the deep-rooted inequalities in urban centers, pointing to how they must change. Overwhelmingly, the people carrying out "essential services," who are at greater risk from the virus, are of low-income and minority groups. They also [live in more cramped conditions](#) than [wealthier residents](#), and are more likely to suffer from chronic health conditions related to [lack of access to clean water or poor air quality](#).

Requirements and actions for city leaders

With the fabric of cities having unraveled so decidedly during the crisis, and unlikely to resume its former shape, leaders now have a compelling reason and unique opportunity to transform the urban environment into something **more sustainable, more resilient, and more equal**. With strategic investment of capital and political will in key areas, progress could be accelerated in a way that has not been seen before, by binding urban planning more closely with economic and social needs, and long-term trends such as climate change. However, city leaders must act quickly as the window of opportunity is narrow.

The key action points to address are:

- **Rebalancing density.** The new need for increased physical distance is a vital theme and has sparked a requirement for more flexible and dynamic use of the urban footprint to accommodate all its needs. For many cities, this can be accomplished by updating regulations related to land use and zoning, in which development is restricted to commercial, industrial, or residential use, and so on. When too rigid, these can cause problems, for example in several US cities, where "[single-family zoning](#)" has hampered attempts to create smaller scale or more sustainable housing, driving prices up. By adopting a more flexible approach to zoning and encouraging more mixed-use development, cities can continue to build, while distributing space more equitably and ensuring physical distance is maintained. In Toronto, [mixed-use zoning and development](#) has guided the city's development since the mid-1980s.



- **Localizing lifestyles.** In addition, broader strategies to “localize” city neighborhoods will also help to distribute populations and reduce pressure on transportation systems, by shrinking the distance travelled by residents to reach work and other important locations. Two examples are Sydney’s “30-minute city,” designed to ensure all residents can reach one of three central areas by foot, bicycle, or public transport within half an hour, and “20-minute neighborhoods” in Portland, Oregon. City leaders should also take note of the recent [shift to long-encouraged behaviors](#) such as cycling and walking, and take advantage of the momentum in alternative forms of transport to make their cities more accessible and sustainable. This will require permanent new transportation networks, developed in consultation with residents to ensure universal access to cycling and walking paths, and new safety and security provisions to minimize accidents and injury. Not all development can be effectively mixed, but by engaging with their communities effectively, city planners can involve local residents in planning urban layouts that serve them best.
- **Rebuilding trust in public transit.** While rebalancing population density is a long-term effort, cities need economic relief now, and that means getting residents moving more freely again. To do that, they will have to rebuild trust in public transport, and give people the confidence it is safe to use. Many cities have already taken action: [in Paris](#), artificial intelligence has been deployed to measure compliance with the requirement to wear masks, and employers [in New York City](#) have been asked to allow flexible start times to reduce travel during peak hours. The next frontier will be real-time mapping platforms with comprehensive travel information, to help citizens minimize wait times and avoid crowds, and give providers and authorities the information they need to make transit systems even more flexible and resilient over time. The Transit app aims to do just this, and is already available in 200 cities, where those with contactless payment systems provide valuable data to feed the system.
- **Expanding green space.** With COVID-19 lockdowns increasing awareness of the link between the outdoors and mental health, incorporating green spaces throughout cities has become more of a priority. In fact, new [research from University of Aarhus in Denmark](#) shows that childhood exposure to green space dramatically reduces the risk of developing a psychiatric disorder during adolescence and adulthood. However, there is evidence that [more green space exists in wealthy areas](#), another physical manifestation of inequality that must be addressed.
- **Enabling universal digital connectivity.** There are no two ways about it: for cities to remain viable in the post-COVID world, they must invest in digital infrastructure, making sure neither income nor location are obstacles to access. This is equally true for rural areas, which can also help relieve stress on urban centers. Seoul is perhaps the closest to [achieving universal connectivity](#); 99.2 percent of its residents have Internet speeds more than four times faster than the world average. However, this was not an overnight job: it took decades of dedicated, long-term investment in infrastructure and R&D. If other cities can follow suit and, importantly, educate their populations about the importance of cyber safety and security, they will set themselves up for future innovation and opportunities, and be in a better position to respond to future challenges.
- **Designing for resilience.** While 2020 has revealed the extent of uncertainty facing cities, one thing is certain: COVID-19 will not be the last crisis they come up against. In an increasingly volatile environment, it’s crucial for city leaders to plan and prepare for a wide array of potential disruptions and cater for these in the way they plan and develop urban spaces. This essentially means prioritizing adaptability—so that spaces can be used in diverse ways or retrofitted quickly when needed. Throughout the pandemic, there have been many creative and ingenious responses. For example, an architect in Rotterdam designed a micro-market that could be set up in any public square, allowing residents to shop locally and at a safe distance. But by planning ahead and designing flexibility into city features such as parks, stadiums, and even roadways up front, cities will be able to act more quickly in times of need, making them more resilient in the long run.

Where to next?

For global cities, the current crisis and emerging future demand significant adaptive change. Some of the fundamental factors that have historically enabled them to create value have been painfully disrupted, many of the connections between them are teetering on a knife's edge, and the ways in which they use and allocate space require an urgent rethink. However, not only do the tools for tackling this new environment exist, but the pandemic and its aftermath have also created a rare openness to doing things differently. Seizing this opportunity won't be easy, or a short-term affair. But if we can be certain of anything, it's that cities will adapt and evolve, and that they have the potential to come back stronger. The proposals outlined in this report are intended to help city leaders take the concrete, practical action needed to create what is next for their cities and define what a global city now looks like. We look forward to seeing how they rise to the challenge, and what next year's Global Cities Report will bring.

If we can be certain of anything, it's that cities will adapt and evolve, and that they have the potential to come back stronger.

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The authors would like to thank Erik R. Peterson, Jefferson Wang, Pengyuan Zhou, Nicole Dessibourg-Freer, Nadim Rami, and Ralph Kamar for their valuable contributions to this report.

Global Cities Index: current performance

Measures 29 metrics across five dimensions:

- Business activity (30%): capital flow, market dynamics, and major companies present
- Human capital (30%): education levels
- Information exchange (15%): access to information through Internet and other media sources
- Cultural experience (15%): access to major sporting events, museums, and other expos
- Political engagement (10%): political events, think tanks, and embassies

Rank and score determined by totaling the weighted averages of each dimension to yield a score on the scale of 0 to 100 (100 = perfect)

Sources are derived from publicly available city-level data

Global Cities Outlook: future potential

Measures 13 leading indicators across four dimensions:

- Personal well-being (25%): safety, healthcare, inequality, and environmental performance
- Economics (25%): long-term investments and GDP
- Innovation (25%): entrepreneurship through patents, private investments, and incubators
- Governance (25%): proxy for long-term stability through transparency, quality of bureaucracy, and ease of doing business

Rank and score determined by averaging the rate of change across each metric using data from the past five years, then projecting out to 2030; weighted averages applied to each dimension to yield a score on a scale of 0 to 100 (100 = perfect)

Sources are derived from publicly available city-level data

North America

Atlanta	Miami	San Francisco
Boston	Minneapolis	Seattle
Chicago	Montreal	Toronto
Dallas	New York	Vancouver
Houston	Philadelphia	Washington, D.C.
Los Angeles	Phoenix	

Latin America

Belo Horizonte	Lima	Recife
Bogotá	Mexico City	Rio de Janeiro
Buenos Aires	Monterrey	Salvador
Caracas	Porto Alegre	Santiago
Guadalajara	Puebla	São Paulo

Asia Pacific

Ahmedabad	Hyderabad	Seoul
Almaty	Jakarta	Shanghai
Bandung	Karachi	Shenyang
Bangalore	Kolkata	Shenzhen
Bangkok	Kuala Lumpur	Singapore
Beijing	Lahore	Surabaya
Changsha	Manila	Surat
Chengdu	Melbourne	Suzhou
Chennai	Mumbai	Sydney
Chongqing	Nagoya	Taipei
Dalian	Nanjing	Tangshan
Dhaka	New Delhi	Tianjin
Dongguan	Ningbo	Tokyo
Foshan	Nur-Sultan	Wuhan
Guangzhou	Osaka	Wuxi
Hangzhou	Perth	Xi'an
Harbin	Pune	Yangon
Ho Chi Minh	Qingdao	Yantai
Hong Kong	Quanzhou	Zhengzhou

Europe

Amsterdam	Helsinki	Oslo
Barcelona	Istanbul	Paris
Berlin	Kyiv	Prague
Brussels	Lisbon	Rome
Budapest	London	Stockholm
Copenhagen	Luxembourg	Saint Petersburg
Dublin	Madrid	Vienna
Düsseldorf	Milan	Warsaw
Frankfurt	Moscow	Zagreb
Geneva	Munich	Zurich

Africa

Abidjan	Casablanca	Luanda
Accra	Johannesburg	Nairobi
Addis Ababa	Khartoum	Tunis
Alexandria	Kinshasa	
Cape Town	Lagos	

Middle East

Abha	Dammam	Medina
Abu Dhabi	Doha	Muscat
Amman	Dubai	Riyadh
Ankara	Jeddah	Tehran
Baghdad	Kuwait City	Tel Aviv
Beirut	Makkah	
Cairo	Manama	

 New cities

Source: Kearney 2020 Global Cities Report

Appendix C

Global Cities Index results, 2015–2020 (1/2)

City	Rank						
	2020	2019	2018	2017	2016	2015	Δ '19-'20
New York	1	1	1	1	2	1	—
London	2	2	2	2	1	2	—
Paris	3	3	3	3	3	3	—
Tokyo	4	4	4	4	4	4	—
Beijing	5	9	9	9	9	9	+4
Hong Kong	6	5	5	5	5	5	−1
Los Angeles	7	7	6	8	6	6	—
Chicago	8	8	8	7	7	7	—
Singapore	9	6	7	6	8	8	−3
Washington, D.C.	10	10	11	10	10	10	—
Sydney	11	11	15	17	14	15	—
Shanghai	12	19	19	19	20	21	+7
San Francisco	13	22	20	23	23	22	+9
Brussels	14	12	10	11	12	12	−2
Berlin	15	14	16	14	16	17	−1
Madrid	16	15	13	13	13	16	−1
Seoul	17	13	12	12	11	11	−4
Melbourne	18	16	17	15	15	19	−2
Toronto	19	17	18	16	17	13	−2
Moscow	20	18	14	18	18	14	−2
Boston	21	21	24	21	24	23	—
Vienna	22	25	21	20	19	18	+3
Amsterdam	23	20	22	22	22	25	−3
Munich	24	32	32	36	33	38	+8
Buenos Aires	25	24	25	26	21	20	−1
Barcelona	26	23	23	24	26	27	−3
Dubai	27	27	28	28	28	26	—
Frankfurt	28	28	29	29	29	28	—
Montreal	29	29	27	27	27	24	—
Miami	30	31	30	30	30	31	+1
Zurich	31	30	33	32	31	30	−1
Houston	32	35	41	40	38	34	+3
Atlanta	33	34	35	38	40	37	+1
Istanbul	34	26	26	25	25	29	−8
Osaka	35	50	50	51	52	59	+15
Bangkok	36	42	43	41	41	43	+6
Rome	37	36	34	33	35	36	−1
Mexico City	38	40	38	34	39	35	+2
Stockholm	39	39	39	39	32	33	—
Geneva	40	37	36	37	36	40	−3

City	Rank						
	2020	2019	2018	2017	2016	2015	Δ '19-'20
Vancouver	41	38	37	35	37	39	−3
São Paulo	42	33	31	31	34	32	−9
Philadelphia	43	51	51	50	47	46	+8
Taipei	44	44	45	47	43	44	—
Seattle	45	47	48				+2
Dublin	46	46	44	46	48	48	—
Dallas	47	43	46	48	51	49	−4
Milan	48	41	40	43	45	42	−7
Copenhagen	49	45	42	42	42	45	−4
Prague	50	48	47	45	46	51	−2
Tel Aviv	51	53	57	57	62	60	+2
Lisbon	52						
Mumbai	53	54	52	44	44	41	+1
Oslo	54						
Johannesburg	55	52	53	53	60	55	−3
New Delhi	56	56	58	54	61	57	—
Perth	57						
Kuala Lumpur	58	49	49	49	49	47	−9
Bogotá	59	58	55	55	57	56	−1
Helsinki	60						
Warsaw	61	55	54	58	55	61	−6
Santiago	62	60	60	60	58	62	−2
Guangzhou	63	71	71	71	71	71	+8
Cairo	64	66	65	62	53	50	+2
Düsseldorf	65	64	67	68	67	68	−1
Minneapolis	66						
Manila	67	65	64	66	59	58	−2
Doha	68	61	63	63	65	66	−7
Lima	69	63	61	61	63	64	−6
Jakarta	70	59	59	56	56	54	−11
Budapest	71	62	62	59	54	52	−9
Rio de Janeiro	72	57	56	52	50	53	−15
Riyadh	73	67	66	65	66	65	−6
Luxembourg	74						
Shenzhen	75	79	79	80	83	84	+4
Abu Dhabi	76	69	68	64	64	63	−7
Cape Town	77	73	73	69	70	69	−4
Nagoya	78	70	70	70	69	73	−8
Phoenix	79	72	72	72	72	67	−7
Saint Petersburg	80	68	69	67	68	70	−12

Source: Kearney 2020 Global Cities Report

Appendix C

Global Cities Index results, 2015—2020 (2/2)

City	Rank						
	2020	2019	2018	2017	2016	2015	Δ '19-'20
Beirut	81						
Hangzhou	82	91	117	116	115	113	+9
Amman	83						
Ankara	84	74	75	74	74	72	−10
Jeddah	85	75	74	83			−10
Nanjing	86	86	88	87	86	92	—
Chengdu	87	89	89	88	96	96	+2
Bangalore	88	78	78	75	75	76	−10
Kyiv	89						
Nairobi	90	77	76	73	73	75	−13
Dhaka	91	82	85	84	81	87	−9
Zagreb	92						
Wuhan	93	104	102	100	107	104	+11
Tianjin	94	88	87	92	94	102	−6
Kuwait City	95	76	77	82	82	83	−19
Chennai	96	80	82	81	77	80	−16
Ho Chi Minh	97	81	80	76	76	77	−16
Suzhou	98	95	115	112	109	105	−3
Caracas	99	83	81	79	79	74	−16
Xi'an	100	109	113	114	114	115	+9
Hyderabad	101	85	84	77	78	78	−16
Chongqing	102	105	114	115	113	114	+3
Changsha	103	113	124				+10
Monterrey	104	90	99	95	98	98	−14
Qingdao	105	110	110	109	110	112	+5
Guadalajara	106	98	98	94	99	94	−8
Casablanca	107	94	97	101	90	91	−13
Tehran	108	96	94	98	93	97	−12
Abidjan	109	92	90	106	103	106	−17
Accra	110	93	92	91	88	89	−17
Tunis	111	102	96	99	91	90	−9
Lagos	112	84	83	78	80	86	−28
Belo Horizonte	113	97	95	90	97	93	−16
Addis Ababa	114	100	107	96	100	85	−14
Muscat	115	99	109	119			−16
Porto Alegre	116		93	89	89	88	
Karachi	117	87	86	86	85	79	−30
Dalian	118	108	106	107	108	110	−10
Kolkata	119	103	91	85	84	81	−16
Salvador	120		101	93	95	99	

City	Rank						
	2020	2019	2018	2017	2016	2015	Δ '19-'20
Zhengzhou	121	119	128	123	121	122	+2
Ningbo	122	116	123				−6
Pune	123	111	111	97	92	95	−12
Almaty	124						
Recife	125		112	105	102	101	
Harbin	126	114	118	117	117	117	−12
Lahore	127	107	103	111	106	103	−20
Shenyang	128	118	120	124	122	123	−10
Manama	129	112	100	102	87	82	−17
Kinshasa	130	101	104	108	112	111	−29
Ahmedabad	131	117	108	103	101	100	−14
Nur-Sultan	132						
Puebla	133		122	120			
Baghdad	134	122	121	118	116	116	−12
Surabaya	135	106	105	104	104	109	−20
Bandung	136	115	116	110	105	108	−21
Yangon (Rangoon)	137	123	127	122	118	118	−14
Wuxi	138	124	130				−14
Dammam	139						
Khartoum	140	120	129	126	123	121	−20
Yantai	141	127	132				−14
Foshan	142	125	131				−17
Dongguan	143	128	133	127	124	124	−15
Quanzhou	144		135	128	125	125	
Tangshan	145	130	134				−15
Surat	146	129	125	121	119	120	−17
Luanda	147	121	126	125	120	119	−26
Alexandria	148	126	119	113	111	107	−22
Medina	149						
Makkah	150						
Abha	151						

Source: Kearney 2020 Global Cities Report

Appendix D

Global Cities Outlook results, 2015—2020 (1/2)

City	Rank						
	2020	2019	2018	2017	2016	2015	Δ '19-'20
London	1	1	3	4	3	2	—
Toronto	2	11	12	20	22	20	+9
Singapore	3	2	5	11	16	10	−1
Tokyo	4	6	14	23	18	19	+2
Paris	5	5	4	3	11	15	—
Munich	6	8	7	7	6	5	+2
Abu Dhabi	7	20	50	52	52	48	+13
Stockholm	8	10	11	9	7	11	+2
Amsterdam	9	4	6	16	14	17	−5
Dublin	10	9	33	40	33	21	−1
San Francisco	11	3	1	1	1	1	−8
Sydney	12	13	19	13	9	6	+1
Montreal	13	23	21	32	26	27	+10
Berlin	14	16	18	18	17	14	+2
Boston	15	7	8	5	4	3	−8
Geneva	16	12	16	14	13	8	−4
Luxembourg	17						
Dubai	18	32	42	46	37	32	+14
Melbourne	19	14	10	6	10	9	−5
Copenhagen	20	17	23	21	20	18	−3
Vienna	21	18	25	29	32	39	−3
Zurich	22	15	13	12	8	4	−7
Chicago	23	38	15	15	15	16	+15
Perth	24						
Vancouver	25	19	17	24	25	23	−6
Taipei	26	25	38	44	28	28	−1
New York	27	24	2	2	2	13	−3
Düsseldorf	28	26	27	22	27	26	−2
Brussels	29	27	22	28	21	22	−2
Minneapolis	30						
Madrid	31	45	49	48	46	43	+14
Beijing	32	39	47	45	51	57	+7
Frankfurt	33	30	29	30	30	30	−3
Atlanta	34	35	26	17	12	25	+1
Seattle	35	34	32				−1
Barcelona	36	40	40	37	39	37	+4
Nagoya	37	31	34	42	44	40	−6
Helsinki	38						
Washington, D.C.	39	29	24	19	23	33	−10
Warsaw	40	41	37	31	31	34	+1

City	Rank						
	2020	2019	2018	2017	2016	2015	Δ '19-'20
Shenzhen	41	49	52	47	49	50	+8
Seoul	42	44	45	38	34	12	+2
Osaka	43	37	39	41	29	35	−6
Houston	44	21	9	8	5	7	−23
Shanghai	45	51	64	61	75	78	+6
Phoenix	46	42	36	34	38	41	−4
Dallas	47	33	31	26	19	29	−14
Moscow	48	22	20	10	42	53	−26
Tel Aviv	49	50	43	43	48	46	+1
Milan	50	36	35	33	36	38	−14
Prague	51	28	28	27	35	36	−23
Los Angeles	52	43	30	25	24	24	−9
Oslo	53						
Guangzhou	54	65	59	56	76	77	+11
Suzhou	55	54	55	57	59	54	−1
Philadelphia	56	46	41	36	41	42	−10
Miami	57	48	44	39	40	45	−9
Rome	58	47	48	49	47	47	−11
Budapest	59	53	53	51	50	49	−6
Nanjing	60	57	56	62	58	62	−3
Lisbon	61						
Hong Kong	62	52	54	54	57	51	−10
Wuxi	63	64	57				+1
Muscat	64	58	99	106			−6
Tianjin	65	60	65	63	60	52	−5
Santiago	66	56	51	50	43	31	−10
Buenos Aires	67	62	60	55	61	59	−5
Hangzhou	68	59	70	60	70	74	−9
Wuhan	69	63	71	67	63	61	−6
Quanzhou	70		72	70	72	76	
Dongguan	71	68	81	84	79	82	−3
Foshan	72	75	69				+3
Changsha	73	80	67				+7
Ningbo	74	72	62				−2
Kuwait City	75	67	58	58	54	56	−8
Dalian	76	69	74	72	74	80	−7
Shenyang	77	70	77	71	65	64	−7
Yantai	78	81	73				+3
Harbin	79	71	80	78	77	75	−8
Xi'an	80	61	66	82	82	81	−19

Source: Kearney 2020 Global Cities Report

Appendix D

Global Cities Outlook results, 2015–2020 (2/2)

City	Rank						
	2020	2019	2018	2017	2016	2015	Δ '19-'20
Tangshan	81	77	75				−4
Chengdu	82	73	76	77	71	69	−9
Qingdao	83	79	90	92	88	84	−4
Saint Petersburg	84	55	46	35	45	66	−29
Zhengzhou	85	74	84	85	83	85	−11
Zagreb	86						
Chongqing	87	78	88	89	85	86	−9
Amman	88						
Manama	89	95	100	91	80	79	+6
Ho Chi Minh	90	82	83	74	97	95	−8
Riyadh	91	85	91	66	68	72	−6
Kuala Lumpur	92	76	61	53	53	44	−16
Almaty	93						
Kyiv	94						
Doha	95	66	63	65	62	60	−29
Mumbai	96	90	92	80	95	99	−6
Jeddah	97	84	87	94			−13
Dammam	98						
Makkah	99						
Medina	100						
Abha	101						
Nur-Sultan	102						
Bangkok	103	86	82	83	86	87	−17
Hyderabad	104	93	98	87	94	100	−11
Chennai	105	101	108	97	101	111	−4
Istanbul	106	91	96	88	81	67	−15
Lima	107	83	79	69	64	71	−24
Bangalore	108	92	94	90	93	106	−16
New Delhi	109	99	95	79	87	94	−10
Jakarta	110	100	114	109	108	103	−10
Bogotá	111	88	78	64	55	58	−23
Yangon (Rangoon)	112	112	112	108	113	104	—
Bandung	113	103	116	111	109	109	−10
Surabaya	114	107	120	110	106	102	−7
Ankara	115	110	101	98	84	68	−5
Cape Town	116	102	113	107	110	105	−14
Manila	117	89	85	75	67	65	−28
Pune	118	111	105	102	102	98	−7
Mexico City	119	87	68	59	56	55	−32
Guadalajara	120	94	86	76	73	70	−26

City	Rank						
	2020	2019	2018	2017	2016	2015	Δ '19-'20
Ahmedabad	121	109	104	95	92	90	−12
Beirut	122						
São Paulo	123	98	93	73	78	83	−25
Kolkata	124	115	111	86	103	112	−9
Rio de Janeiro	125	96	89	68	69	73	−29
Baghdad	126	120	126	122	119	118	−6
Casablanca	127	97	103	105	99	91	−30
Surat	128	116	115	101	100	101	−12
Johannesburg	129	106	109	104	104	96	−23
Tunis	130	108	118	114	114	108	−22
Abidjan	131	113	117	113	105	114	−18
Monterrey	132	104	97	81	66	63	−28
Belo Horizonte	133	105	102	96	89	89	−28
Porto Alegre	134		107	99	91	92	
Nairobi	135	119	121	115	107	117	−16
Lahore	136	121	127	120	116	115	−15
Recife	137		110	100	90	88	
Salvador	138		119	103	96	93	
Puebla	139		106	93			
Tehran	140	118	123	118	118	119	−22
Cairo	141	114	122	112	112	107	−27
Alexandria	142	117	124	116	115	97	−25
Addis Ababa	143	123	131	124	121	113	−20
Karachi	144	124	128	117	98	120	−20
Accra	145	122	125	119	111	110	−23
Luanda	146	127	132	126	124	123	−19
Khartoum	147	126	134	128	125	125	−21
Dhaka	148	130	135	127	123	122	−18
Kinshasa	149	125	129	121	120	121	−24
Lagos	150	129	133	125	122	124	−21
Caracas	151	128	130	123	117	116	−23

Source: Kearney 2020 Global Cities Report

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