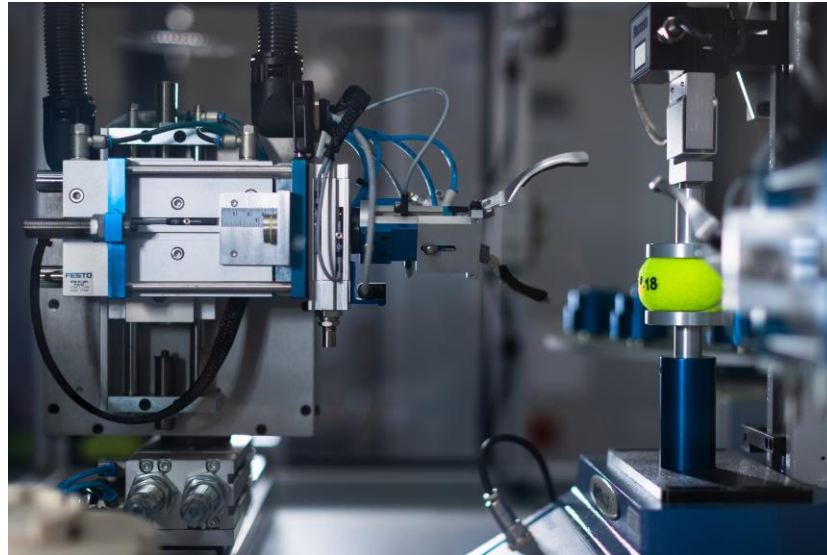




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Smart Centres Index 2 Launch



Financial Centre Futures



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Smart Centres Index 2

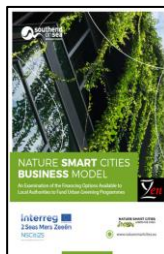
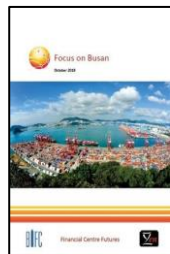
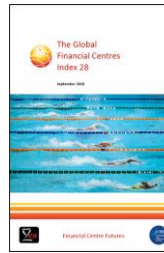
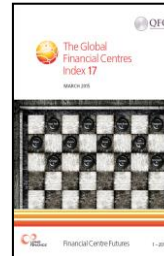
Mike Wardle
Head Of Indices
Z/Yen Group





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Factor Assessment Index

- ◆ Combine perception data with hard data using advanced statistical modelling
- ◆ Individual assessments of financial and commercial centres are associated with the quantitative data for that centre
- ◆ We can then predict how the individual would rate other cities based on their profile



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Smart Centres Index - Overview

- ◆ The Smart Centres Index is designed to track the development of technology and financial centres across the world in their support for and readiness for new technology applications
- ◆ Aims to help investors, governments, and regulators view the attractiveness of technology centres for new technologies and products by measuring how attuned centres and their regulatory systems are to attracting innovation and growth in innovation and technology



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SCI Dimensions

- ◆ The SCI measures three equally weighted dimensions:
 - Innovation Support – the approach taken to regulation and support for the innovation and technology industry provided by the commercial ecosystem
 - Creative Intensity - the extent to which technology and innovative industries are embedded in the economy of the centre
 - Delivery Capability - the quality of the work being undertaken in the field in the centre

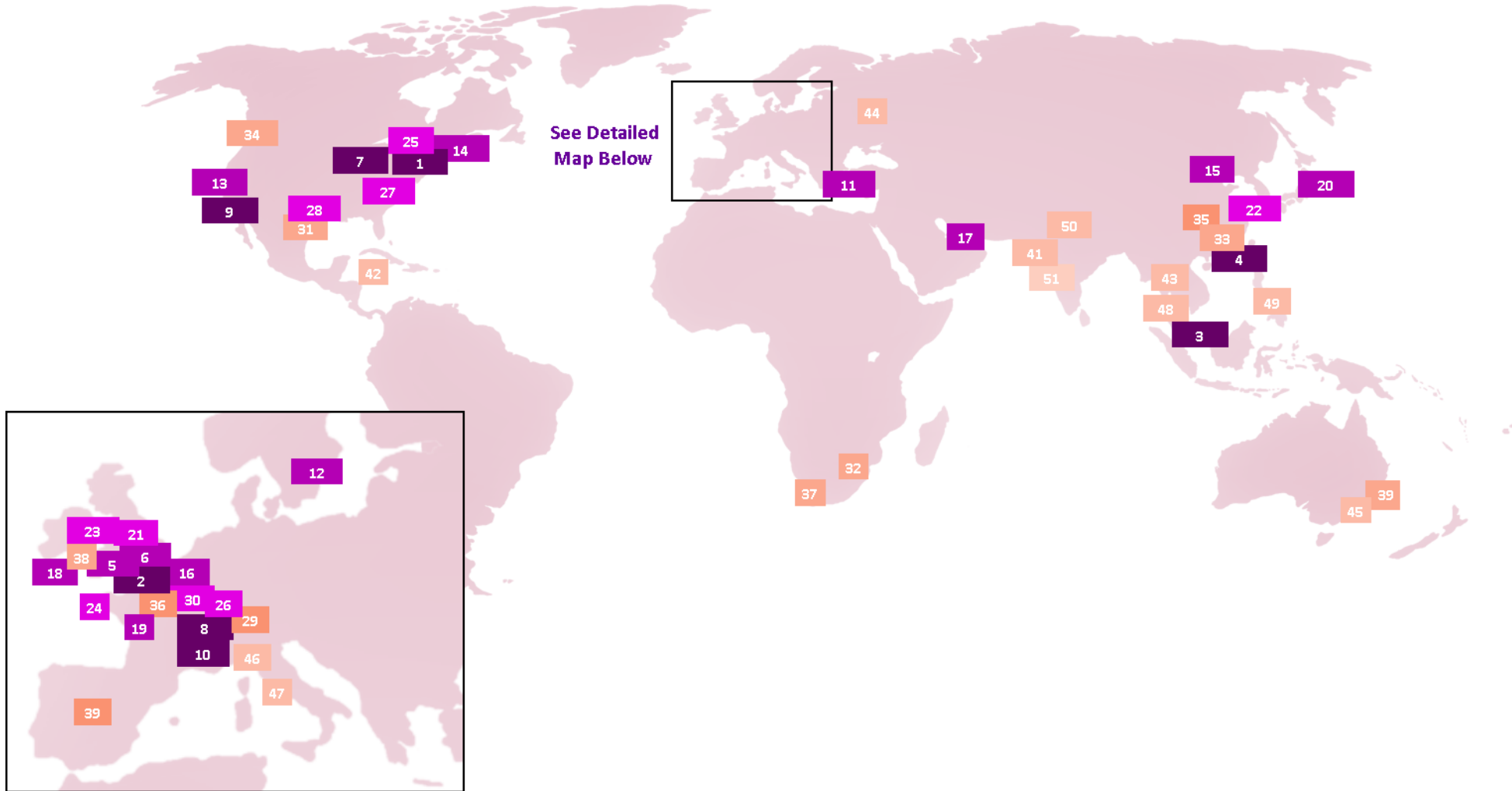


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The SCI World

51 Centres In SCI 2





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SCI 2 Headlines

- ◆ New York has taken first place in the index, with London dropping to second and Singapore retaining its third place
- ◆ Three of the top ten places in the ranking are taken by US centres, and three are taken by UK centres, with Oxford and Cambridge rising in this edition of the index
- ◆ The leading centres are strong across all three of the SCI dimensions - Innovation Support, Creative Intensity, and Delivery Capability
- ◆ Chinese centres do not feature as strongly as we might have expected, and score on average lower for Innovation Support than their overall rating
- ◆ The great majority of centres featured in SCI 2 are located in North America, Asia/Pacific, and Western Europe

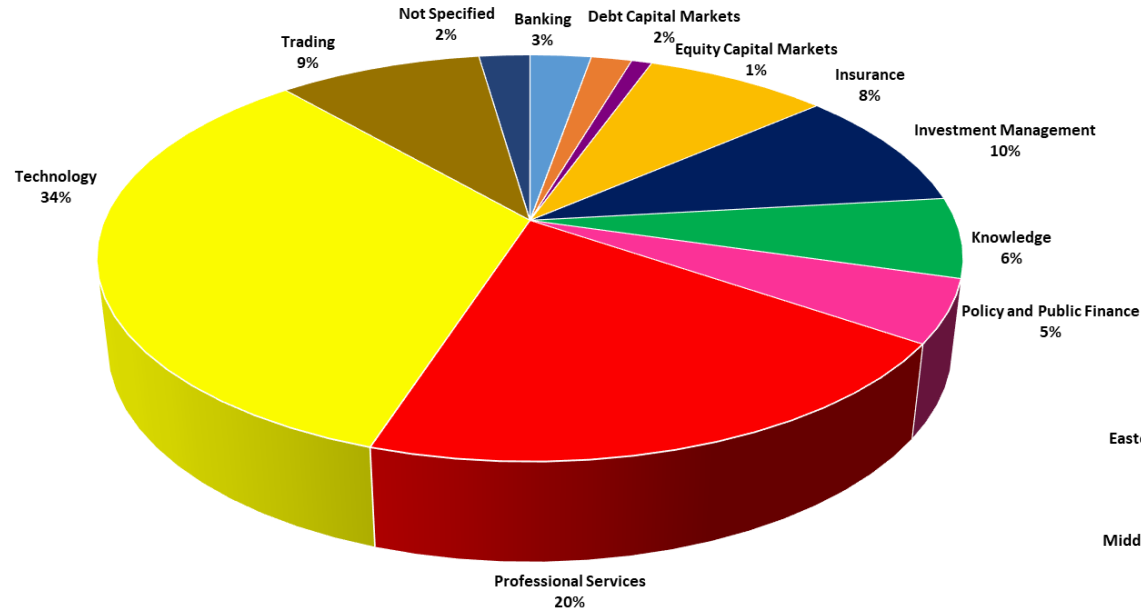


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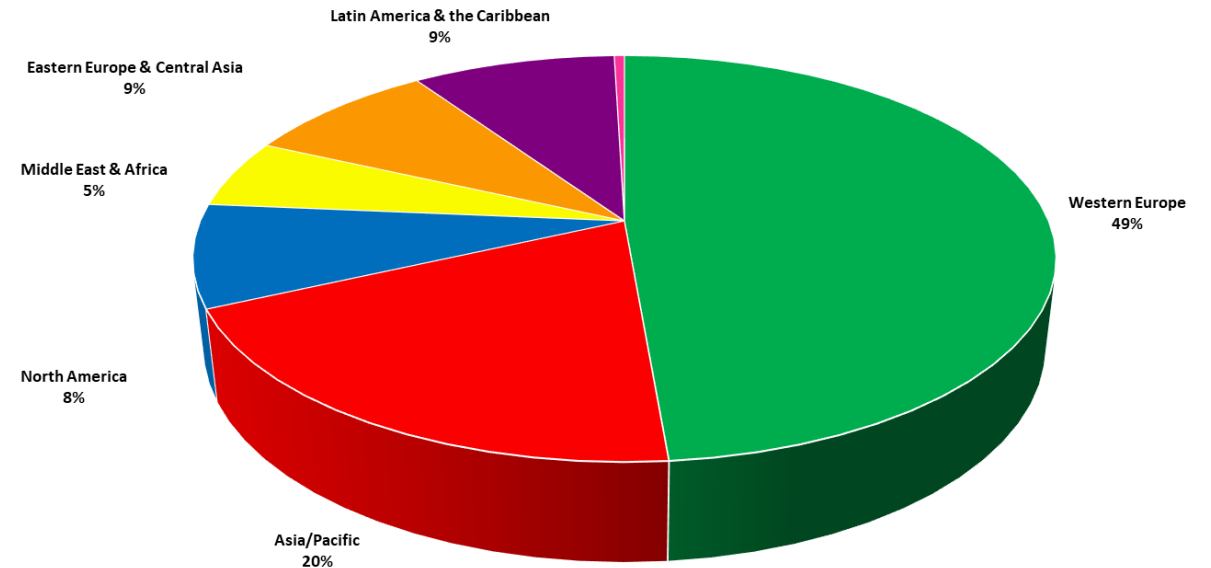


SCI 2 Respondents

Respondents By Sector



Respondents By Region





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SCI 2 – Top Twenty Centres

Centre	SCI 2		SCI 1		Change In Rank	Change In Rating
	Rank	Rating	Rank	Rating		
New York	1	701	2	754	▲ 1	▼ 53
London	2	694	1	760	▼ 1	▼ 66
Singapore	3	689	3	736	0	▼ 47
Hong Kong	4	681	7	713	▲ 3	▼ 32
Oxford, UK	5	677	17	689	▲ 12	▼ 12
Cambridge, UK	6	676	17	689	▲ 11	▼ 13
Chicago	7	673	6	713	▼ 1	▼ 40
Zurich	8	671	10	698	▲ 2	▼ 27
Los Angeles	9	670	5	714	▼ 4	▼ 44
Geneva	10	666	13	692	▲ 3	▼ 26
Tel Aviv	11	651	New	New	New	New
Stockholm	12	650	16	690	▲ 4	▼ 40
San Francisco	13	649	4	717	▼ 9	▼ 68
Boston	14	645	9	704	▼ 5	▼ 59
Beijing	15	643	21	685	▲ 6	▼ 42
Amsterdam	16	642	24	682	▲ 8	▼ 40
Dubai	17	640	34	666	▲ 17	▼ 26
Dublin	18	639	26	681	▲ 8	▼ 42
Paris	19	636	44	651	▲ 25	▼ 15
Tokyo	20	635	8	708	▼ 12	▼ 73





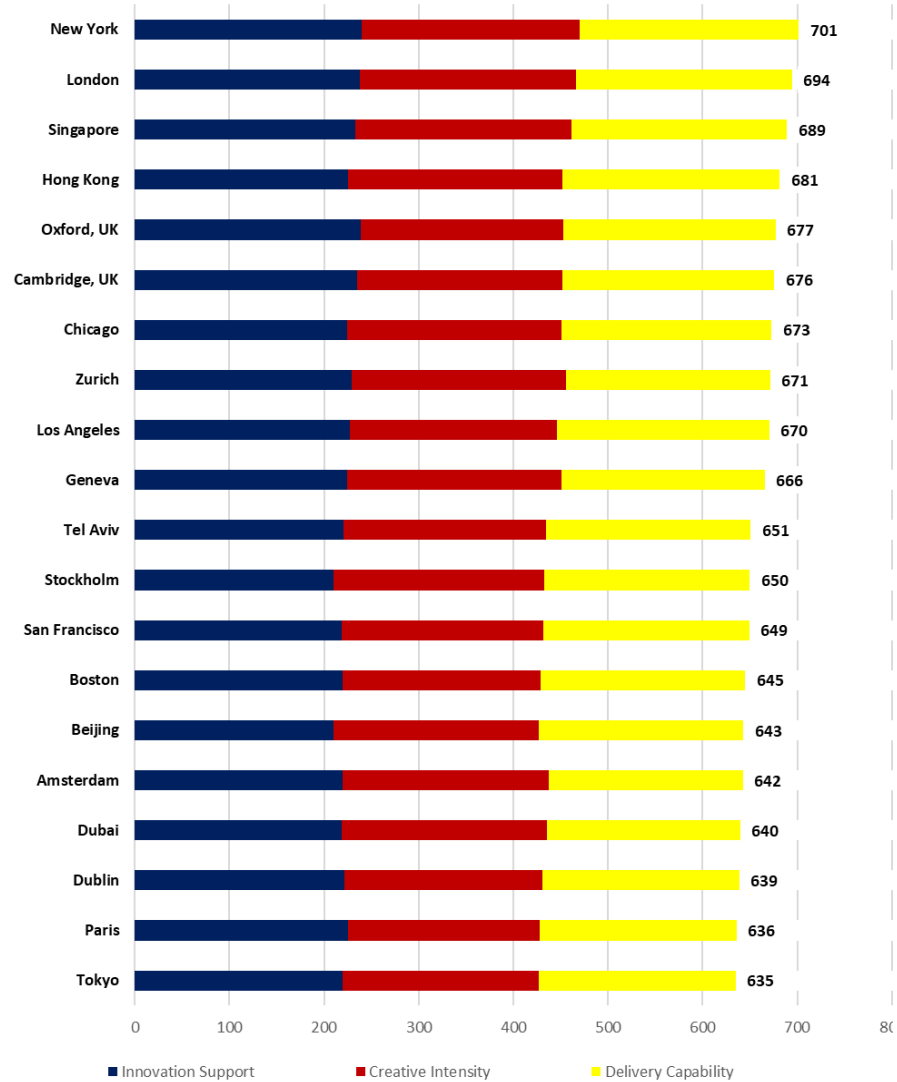
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SCI 2 – Top 20 Centres

◆ The SCI dimensions:

- Innovation Support
- Creative Intensity
- Delivery Capability



Western Europe – Top 10

Centre	SCI 2		SCI 1		Change In Rank	Change In Rating	Innovation Support		SCI 2 Dimensions		Rank	Rating
	Rank	Rating	Rank	Rating			Rank	Rating	Creative Intensity Rank	Creative Intensity Rating		
London	2	694	1	760	▼ 1	▼ 66	3	238	2	229	3	228
Oxford, UK	5	677	17	689	▲ 12	▼ 12	2	238	14	215	5	224
Cambridge, UK	6	676	17	689	▲ 11	▼ 13	4	235	13	216	5	224
Zurich	8	671	10	698	▲ 2	▼ 27	6	229	4	227	13	216
Geneva	10	666	13	692	▲ 3	▼ 26	13	225	6	226	15	215
Stockholm	12	650	16	690	▲ 4	▼ 40	37	210	8	223	10	217
Guernsey	24	629	43	652	▲ 19	▼ 23	15	222	20	209	38	197
Amsterdam	16	642	24	682	▲ 8	▼ 40	20	219	10	218	24	205
Dublin	18	639	26	681	▲ 8	▼ 42	16	222	22	209	20	208
Paris	19	636	44	651	▲ 25	▼ 15	9	225	28	202	20	208

- ◆ Five centres in Western Europe feature in the SCI 2 top 10
- ◆ Comparatively strong in innovation support

North America

Centre	SCI 2		SCI 1		Change In Rank	Change In Rating	Innovation Support		SCI 2 Dimensions		Delivery Capability	
	Rank	Rating	Rank	Rating			Rank	Rating	Rank	Rating	Rank	Rating
New York	1	701	2	754	▲ 1	▼ 53	1	239	1	231	1	231
Chicago	7	673	6	713	▼ 1	▼ 40	13	225	7	226	8	222
Los Angeles	9	670	5	714	▼ 4	▼ 44	7	227	9	219	5	224
San Francisco	13	649	4	717	▼ 9	▼ 68	23	219	17	213	9	218
Boston	14	645	9	704	▼ 5	▼ 59	20	219	20	209	12	216
Toronto	25	628	27	681	▲ 2	▼ 53	32	214	26	203	17	211
Washington DC	27	626	11	693	▼ 16	▼ 67	27	216	31	200	18	210
Dallas / Fort Worth	28	624	13	692	▼ 15	▼ 68	23	219	29	202	27	204
Austin	32	617	21	685	▼ 11	▼ 68	28	216	30	200	30	201
Vancouver	35	608	17	689	▼ 18	▼ 81	40	208	32	200	32	200

- ◆ Three North American centres feature in the SCI 2 top 10
- ◆ Washington DC and Toronto rank significantly higher in the delivery capability dimension

Asia/Pacific – Top 10

Centre	SCI 2		SCI 1		Change In Rank	Change In Rating	Innovation Support		SCI 2 Dimensions Creative Intensity		Delivery Capability	
	Rank	Rating	Rank	Rating			Rank	Rating	Rank	Rating	Rank	Rating
Singapore	3	689	3	736	0	▼47	5	233	2	229	4	228
Hong Kong	4	681	7	713	▲3	▼32	9	225	4	227	2	229
Beijing	15	643	21	685	▲6	▼42	37	210	12	217	10	217
Tokyo	20	635	8	708	▼12	▼73	19	220	24	207	19	208
Shanghai	22	633	12	693	▼10	▼60	34	210	19	211	16	212
Shenzhen	34	610	28	679	▼6	▼69	41	207	34	198	23	205
Guangzhou	36	598	32	670	▼4	▼72	43	202	39	191	22	205
Sydney	40	588	15	691	▼25	▼103	44	201	40	187	34	200
GIFT City- Gujarat	42	587	New	New	New	New	47	198	37	193	39	196
Bangkok	44	578	38	663	▼6	▼85	49	194	38	192	42	191

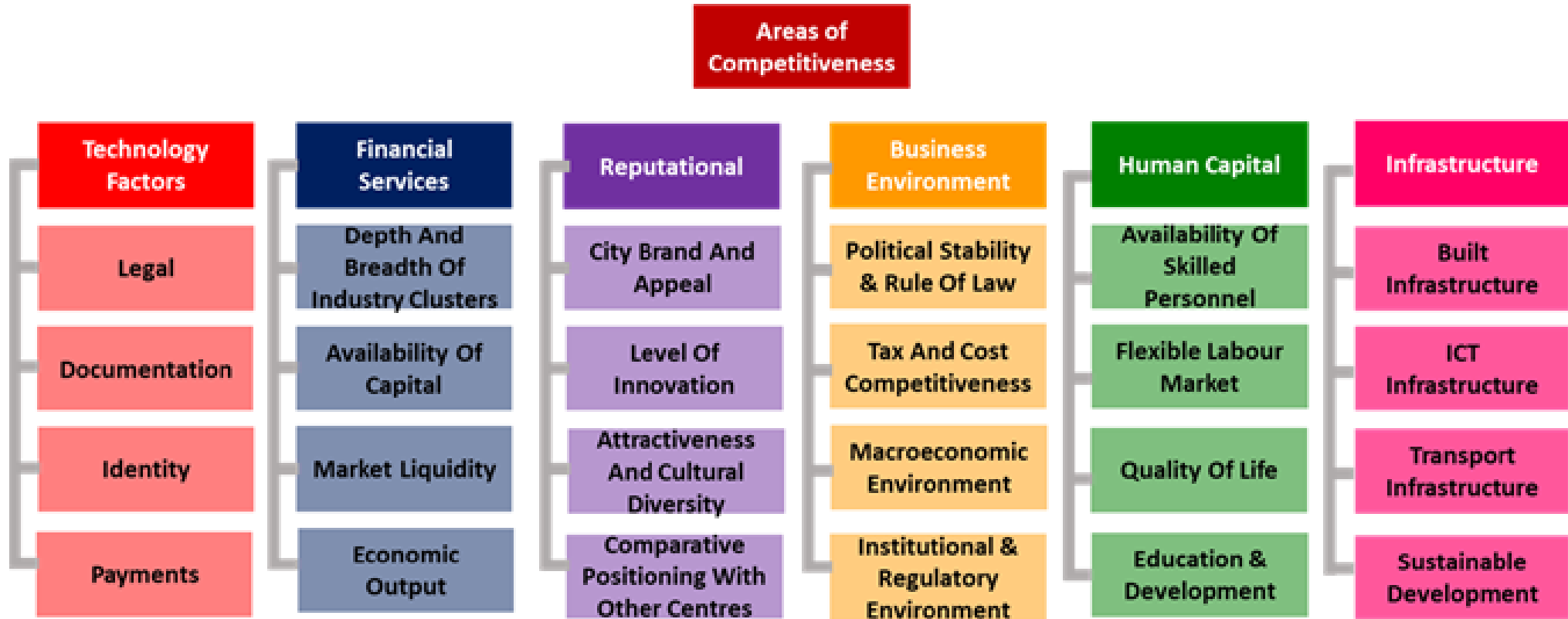
- ◆ Two centres in Asia/Pacific take third and fourth place in the index
- ◆ Asia/Pacific centres generally score lower for innovation support

Other Regions

Centre	SCI 2		SCI 1		Change In Rank	Change In Rating	Innovation Support		SCI 2 Dimensions		Delivery Capability	
	Rank	Rating	Rank	Rating			Rank	Rating	Rank	Rating	Rank	Rating
Tel Aviv	11	651	New	New	New	New	17	220	15	214	13	216
Dubai	17	640	34	666	▲17	▼26	23	219	11	217	26	204
Johannesburg	32	611	46	646	▲14	▼35	28	216	36	194	28	202
Cape Town	37	596	42	653	▲5	▼57	33	211	41	186	35	199
Cayman Islands	42	585	48	624	▲6	▼39	39	208	27	203	47	174
Moscow	44	576	47	644	▲3	▼68	45	199	42	181	40	195

- ◆ New entrant Tel Aviv enters the index in 11th place.
- ◆ Dubai in second place in the other regions table, along with Cayman Islands, score highly for creative intensity

SCI Taxonomy





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Areas Of Competitiveness

Rank	Technology	Financial Services	Reputational	Business Environment	Human Capital	Infrastructure
1	Singapore	New York	Singapore	New York	Hong Kong	New York
2	New York	Chicago	Hong Kong	San Francisco	New York	Chicago
3	Hong Kong	Los Angeles	New York	Los Angeles	London	San Francisco
4	London	Singapore	London	London	Stockholm	Boston
5	Zurich	Hong Kong	Zurich	Chicago	Singapore	Singapore
6	Oxford, UK	San Francisco	San Francisco	Hong Kong	Oxford, UK	Los Angeles
7	Geneva	Boston	Chicago	Boston	Cambridge, UK	London
8	Cambridge, UK	London	Geneva	Singapore	Tel Aviv	Oxford, UK
9	Los Angeles	Zurich	Boston	Zurich	San Francisco	Zurich
10	Dublin	Geneva	Oxford, UK	Oxford, UK	Los Angeles	Hong Kong
11	San Francisco	Oxford, UK	Los Angeles	Geneva	Chicago	Tokyo
12	Glasgow	Munich	Stockholm	Dublin	Zurich	Amsterdam
13	Amsterdam	Cambridge, UK	Amsterdam	Edinburgh	Boston	Geneva
14	Chicago	Stockholm	Cambridge, UK	Cambridge, UK	Geneva	Toronto
15	Tel Aviv	Frankfurt	Dallas/Fort Worth	Amsterdam	Luxembourg	Beijing





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Reputational Advantage

Centre	Weighted Average Assessment	SCI 2 Rating	Reputational Advantage
GIFT City-Gujarat	811	587	224
San Francisco	793	649	144
Boston	785	645	140
Stockholm	786	650	136
Tel Aviv	775	651	124
New York	816	701	115
London	799	694	105
Los Angeles	775	670	105
Singapore	791	689	102
Dallas / Fort Worth	710	624	86
Chicago	754	673	81
Oxford, UK	754	677	77
Toronto	702	628	74
Geneva	736	666	70
Zurich	735	671	64



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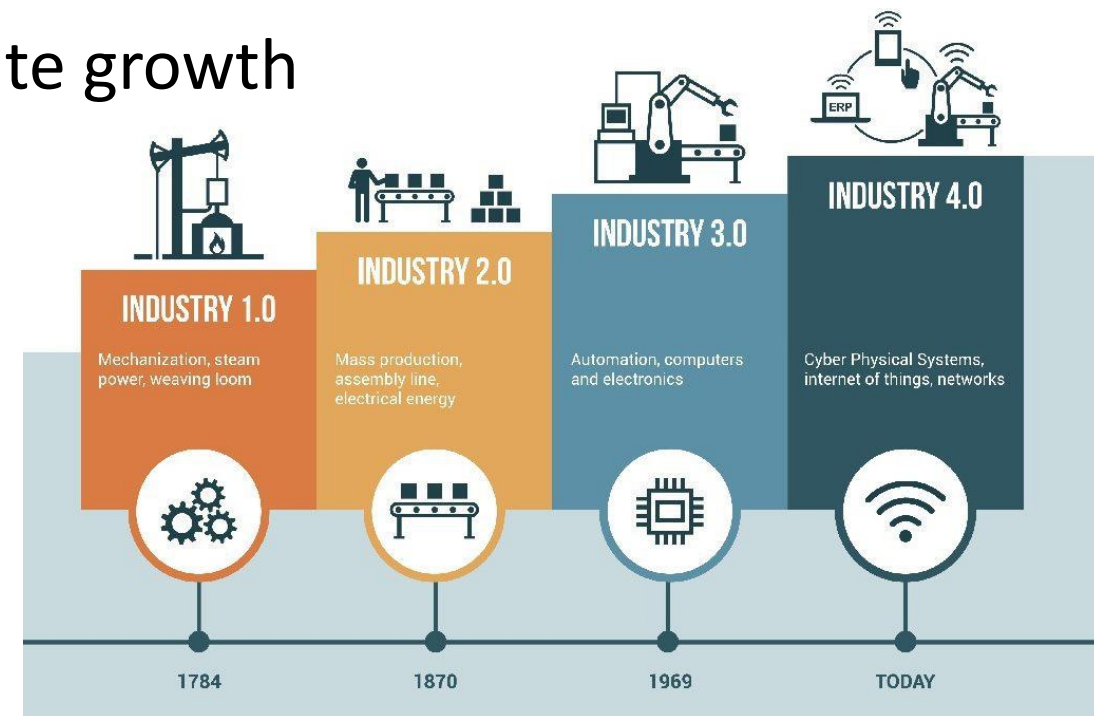
Observations

Professor Michael Mainelli
Executive Chairman
Z/Yen Group



Focus On Centres/Cities

- ◆ Commercial centres focused on the ‘fourth industrial revolution’ – “cyber capabilities integrated with the physical world on an ‘internet of everything’”
- ◆ Looking for competitive advantage
- ◆ Exploring how best to exploit new technology
- ◆ Looking at how to promote and regulate growth





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Technology Education Leaders

Country	Number Of Universities In Top Twenty For Mathematics, And Engineering & Technology
United States Of America	19
United Kingdom	7
China	3
Singapore	3
Switzerland	3
Canada	1
France	1
Italy	1
South Korea	1



Source: QS University Ratings By Subject: <https://www.topuniversities.com/university-rankings/university-subject-rankings/2020>



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Economic Strategies For Success

- ◆ **Education**, including in particular advanced university institutions
- ◆ **Regulation**, providing a supportive infrastructure which balances economic, social, and institutional frameworks in a way that optimises innovation
- ◆ **Access to financial investment** to support new businesses and R&D.
- ◆ **High-class infrastructure**, which enables access to digital services and products.
- ◆ **Connectivity**, allowing collaboration between academic, commercial, and regulatory systems to support the flow of ideas and products.

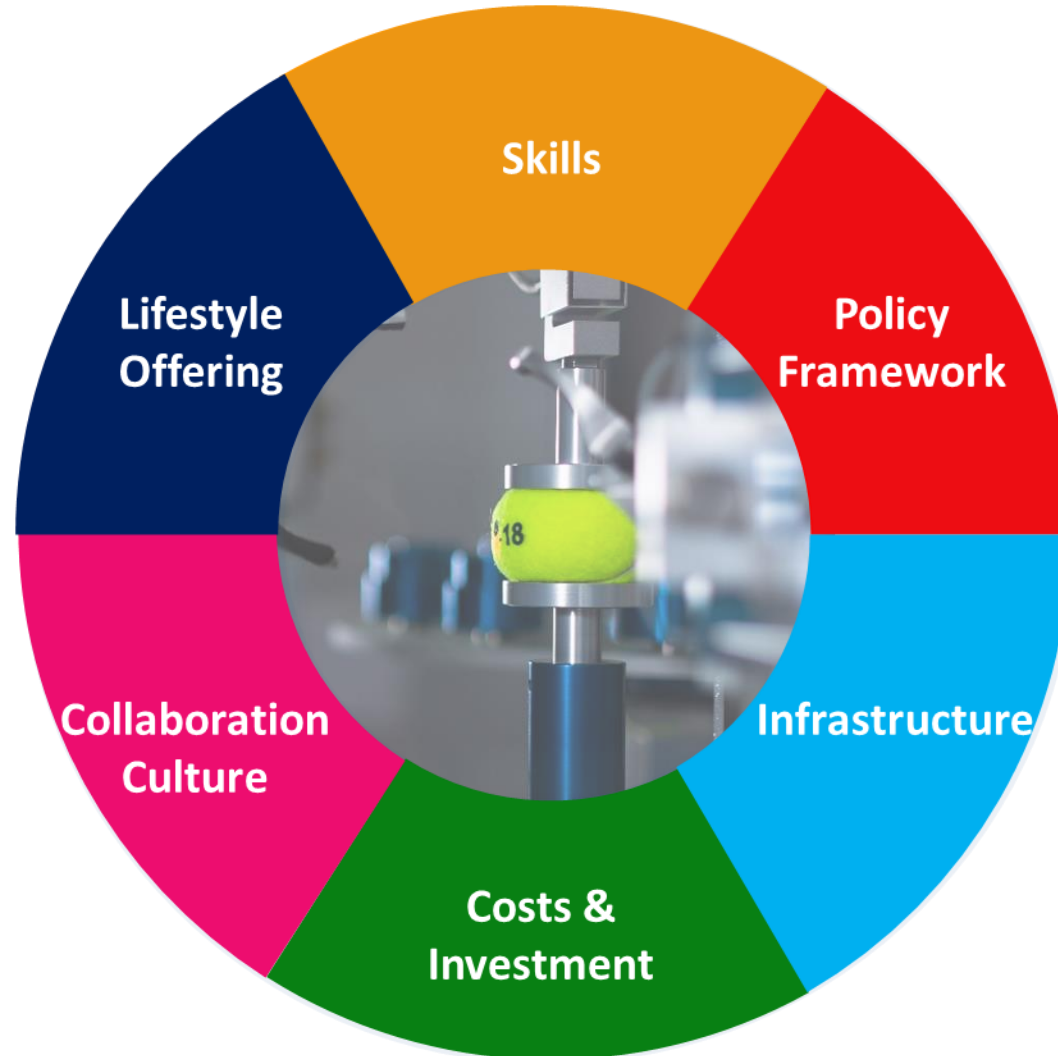




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Locational Strategies For Success





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Comments, Questions, And Answers





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Take the SCI survey at:

www.smartcentresindex.net/survey/



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