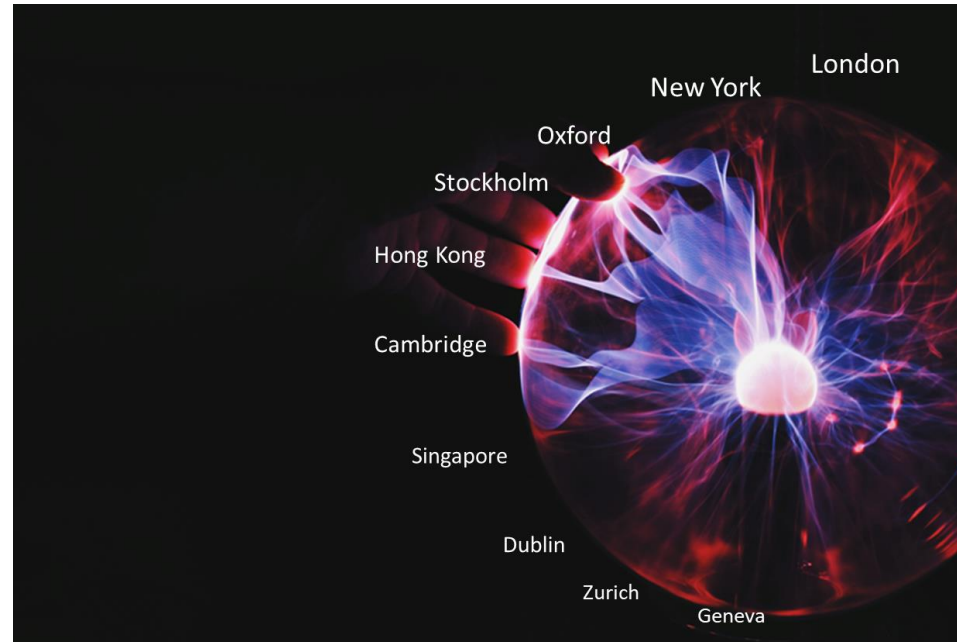




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Smart Centres Index 3 Launch



Distributed Futures



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Smart Centres Index 3

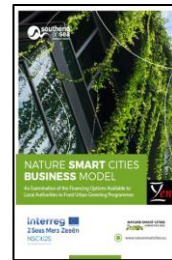
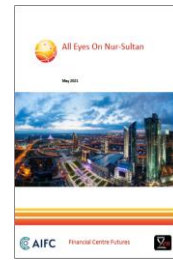
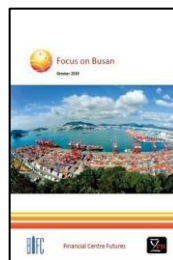
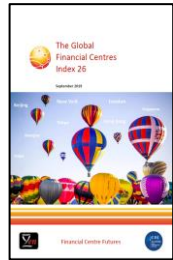
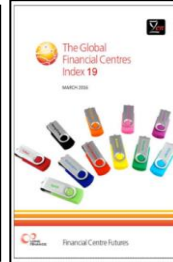
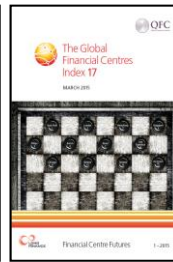
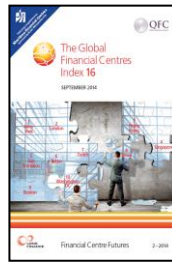
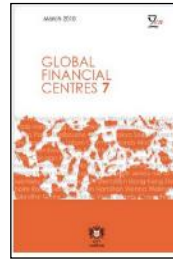
Mike Wardle
Director & Head Of Indices
Z/Yen Group





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Z/Yen Research





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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

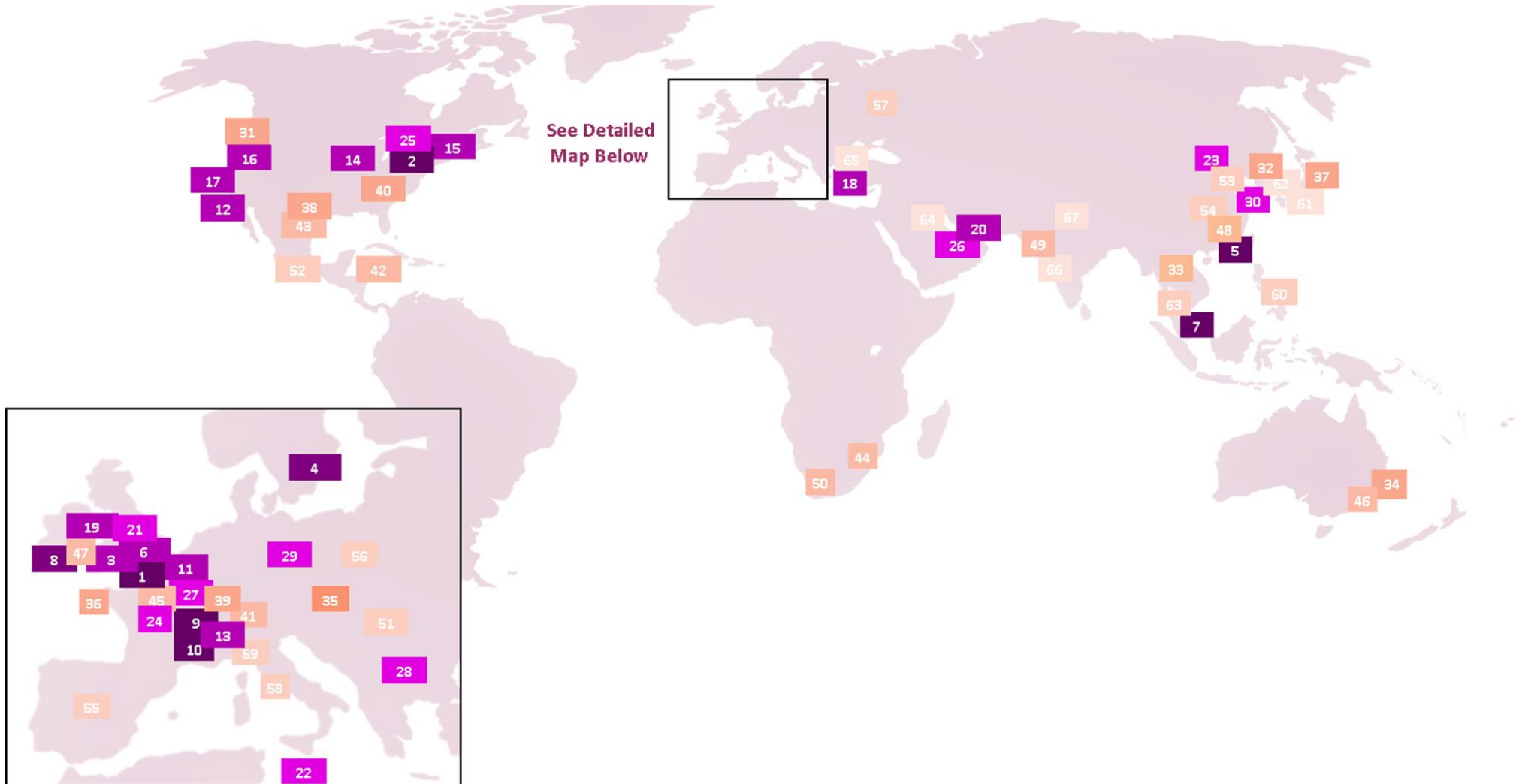


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The SCI World

67 Centres In SCI 3





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SCI 3 Headlines

- ◆ London regained its first position in the index with New York falling to second place.
- ◆ New York is now the only US centre in the top 10, with Stockholm and Dublin replacing Los Angeles and Chicago in this group
- ◆ Oxford, Stockholm, Hong Kong, and Cambridge have overtaken Singapore, which fell from third to seventh place
- ◆ Asia/Pacific centres generally score lower for innovation support and regulation than for creative intensity and delivery capability
- ◆ Only two centres rose 10 or more places in the rankings in SCI 3, while 19 centres fell 10 or more places, as new centres entered the index

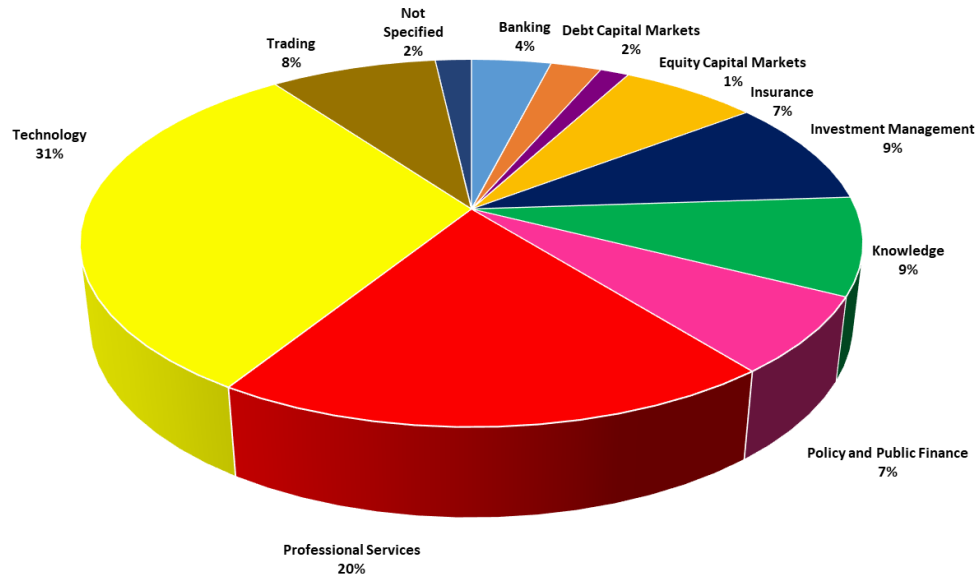


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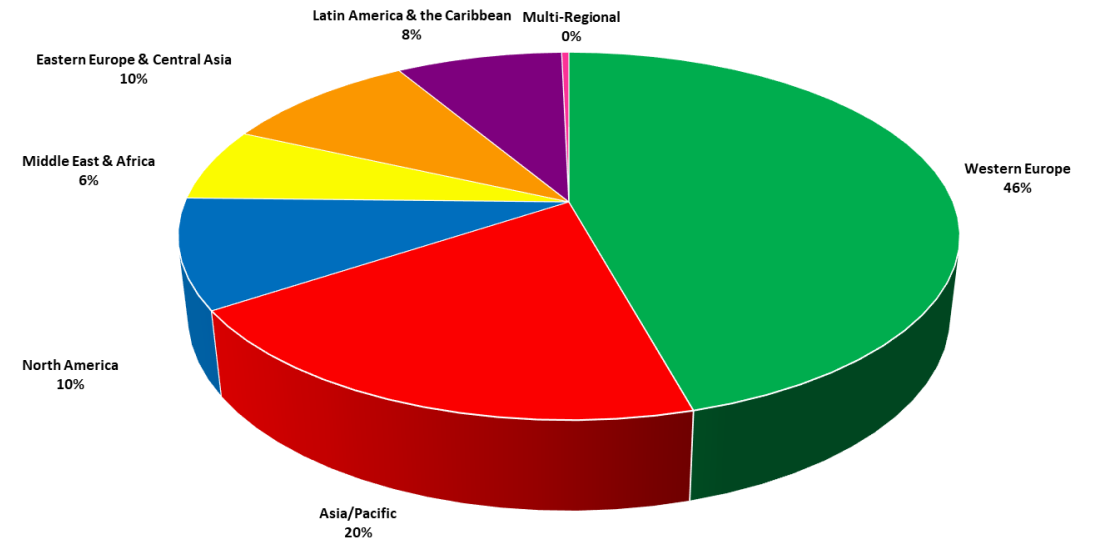


SCI 3 Respondents

Respondents By Sector



Respondents By Region





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SCI 2 – Top Twenty Centres

Centre	SCI 3		SCI 2		Change in	
	Rank	Rating	Rank	Rating	Rank	Rating
London	1	729	2	694	▲ 1	▲ 35
New York	2	716	1	701	▼ 1	▲ 15
Oxford, UK	3	709	5	677	▲ 2	▲ 32
Stockholm	4	705	12	650	▲ 8	▲ 55
Hong Kong	5	704	4	681	▼ 1	▲ 23
Cambridge, UK	6	703	6	676	0	▲ 27
Singapore	7	701	3	689	▼ 4	▲ 12
Dublin	8	699	18	639	▲ 10	▲ 60
Zurich	9	694	8	671	▼ 1	▲ 23
Geneva	10	689	10	666	0	▲ 23
Amsterdam	11	688	16	642	▲ 5	▲ 46
Los Angeles	12	684	9	670	▼ 3	▲ 14
Lugano	13	683	New	New	New	New
Chicago	14	682	7	673	▼ 7	▲ 9
Boston	15	681	14	645	▼ 1	▲ 36
Seattle	16	678	New	New	New	New
San Francisco	17	676	13	649	▼ 4	▲ 27
Tel Aviv	18	675	11	651	▼ 7	▲ 24
Glasgow	19	671	23	632	▲ 4	▲ 39
Dubai	20	670	17	640	▼ 3	▲ 30





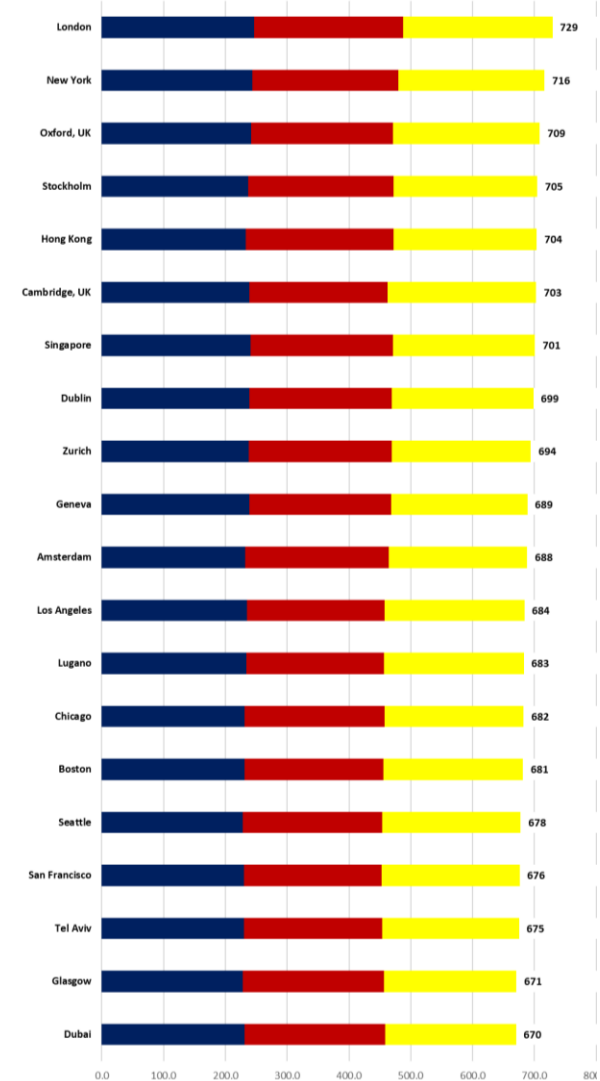
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SCI 3 – Top 20 Centres



◆ The SCI dimensions:

- Innovation Support
- Creative Intensity
- Delivery Capability



Western Europe – Top 10

Centre	SCI 3		SCI 2		Change in	
	Rank	Rating	Rank	Rating	Rank	Rating
London	1	729	2	694	▲ 1	▲ 35
Oxford, UK	3	709	5	677	▲ 2	▲ 32
Stockholm	4	705	12	650	▲ 8	▲ 55
Cambridge, UK	6	703	6	676	0	▲ 27
Dublin	8	699	18	639	▲ 10	▲ 60
Zurich	9	694	8	671	▼ 1	▲ 23
Geneva	10	689	10	666	0	▲ 23
Amsterdam	11	688	16	642	▲ 5	▲ 46
Lugano	13	683	New	New	New	New
Glasgow	19	671	23	632	▲ 4	▲ 39

- ◆ Seven centres in Western Europe feature in the SCI 3 top 10
- ◆ Comparatively strong in innovation support



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North America – Top 10

Centre	SCI 3		SCI 2		Change in	
	Rank	Rating	Rank	Rating	Rank	Rating
New York	2	716	1	701	▼ 1	▲ 15
Los Angeles	12	684	9	670	▼ 3	▲ 14
Chicago	14	682	7	673	▼ 7	▲ 9
Boston	15	681	14	645	▼ 1	▲ 36
Seattle	16	678	New	New	New	New
San Francisco	17	676	13	649	▼ 4	▲ 27
Toronto	25	665	25	628	0	▲ 37
Vancouver	31	659	34	608	▲ 3	▲ 51
Dallas / Fort Worth	38	652	28	624	▼ 10	▲ 28
Washington DC	40	650	27	626	▼ 13	▲ 24

- ◆ Only New York features in the SCI 3 top 10
- ◆ Also stronger overall in Innovation Support

Asia/Pacific – Top 10

Centre	SCI 3		SCI		Change in	
	Rank	Rating	Rank	Rating	Rank	Rating
Hong Kong	5	704	4	681	▼ 1	▲ 23
Singapore	7	701	3	689	▼ 4	▲ 12
Beijing	23	667	15	643	▼ 8	▲ 24
Shanghai	30	660	22	633	▼ 8	▲ 27
Seoul	32	658	New	New	New	New
Bangkok	33	657	43	578	▲ 10	▲ 79
Sydney	34	656	39	588	▲ 5	▲ 68
Tokyo	37	653	20	635	▼ 17	▲ 18
Melbourne	46	643	45	574	▼ 1	▲ 69
Shenzhen	48	641	33	610	▼ 15	▲ 31

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

Middle East & Africa

Centre	SCI 3		SCI 2		Change in	
	Rank	Rating	Rank	Rating	Rank	Rating
Tel Aviv	18	675	11	651	▼ 7	▲ 24
Dubai	20	670	17	640	▼ 3	▲ 30
Abu Dhabi	26	664	New	New	New	New
Johannesburg	44	645	32	611	▼ 12	▲ 34
Cape Town	50	639	37	596	▼ 13	▲ 43
Riyadh	64	598	New	New	New	New

- ◆ MEA centres fell in the rankings, overtaken by new entrants to the index
- ◆ Tel Aviv maintains its first position in the region, followed closely by Dubai
- ◆ Abu Dhabi and Riyadh enter the index

Eastern Europe & Central Asia

Centre	SCI 3		SCI 2		Change in	
	Rank	Rating	Rank	Rating	Rank	Rating
Sofia	28	662	New	New	New	New
Budapest	51	637	New	New	New	New
Warsaw	56	619	New	New	New	New
Moscow	57	618	44	576	▼ 13	▲ 42
Istanbul	65	595	New	New	New	New

- ◆ Four new entrants in the region
- ◆ Moscow fell in the rankings, with other centres joining the index

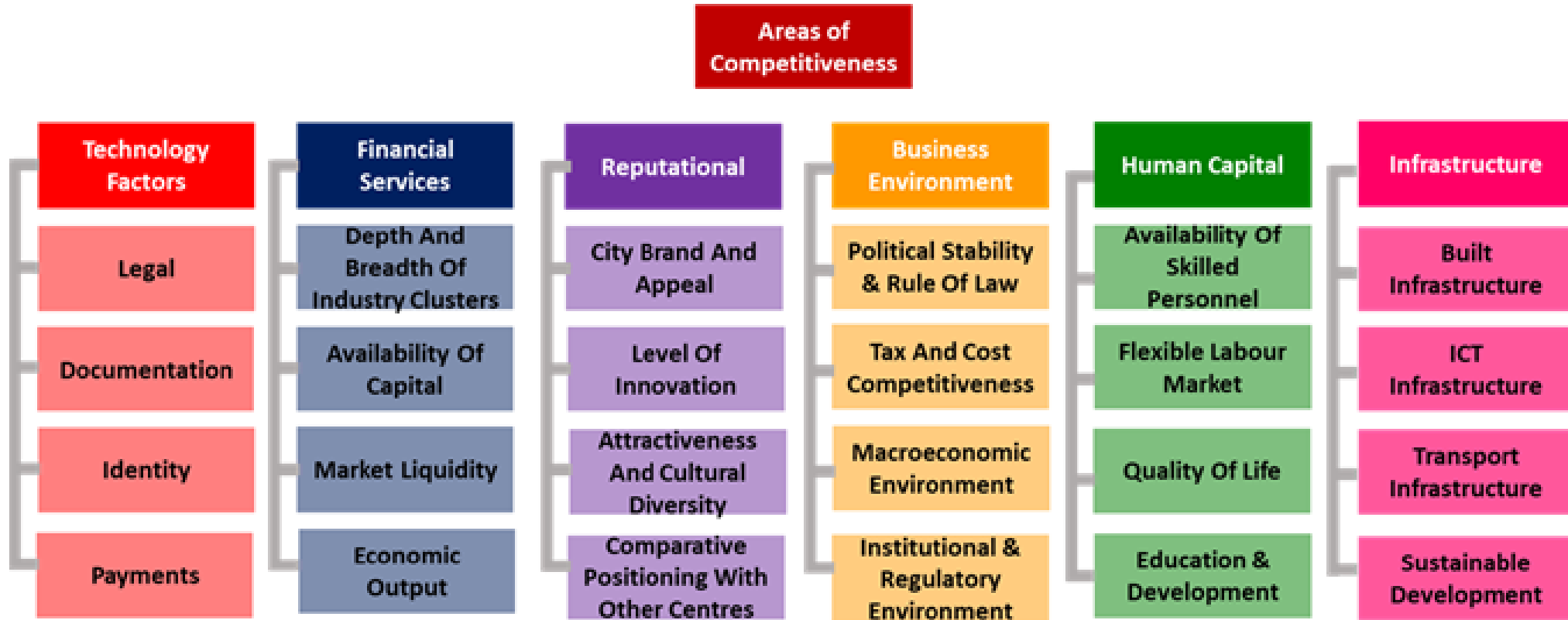
Latin America & The Caribbean

Centre	SCI 3		SCI 2		Change in	Change in
	Rank	Rating	Rank	Rating	Rank	Rating
Cayman Islands	42	647	42	585	0	▲ 62
Mexico City	52	636	New	New	New	New

- ◆ Mexico City joins the Cayman Islands in the index
- ◆ Cayman maintained its ranking and improved its rating



SCI Taxonomy





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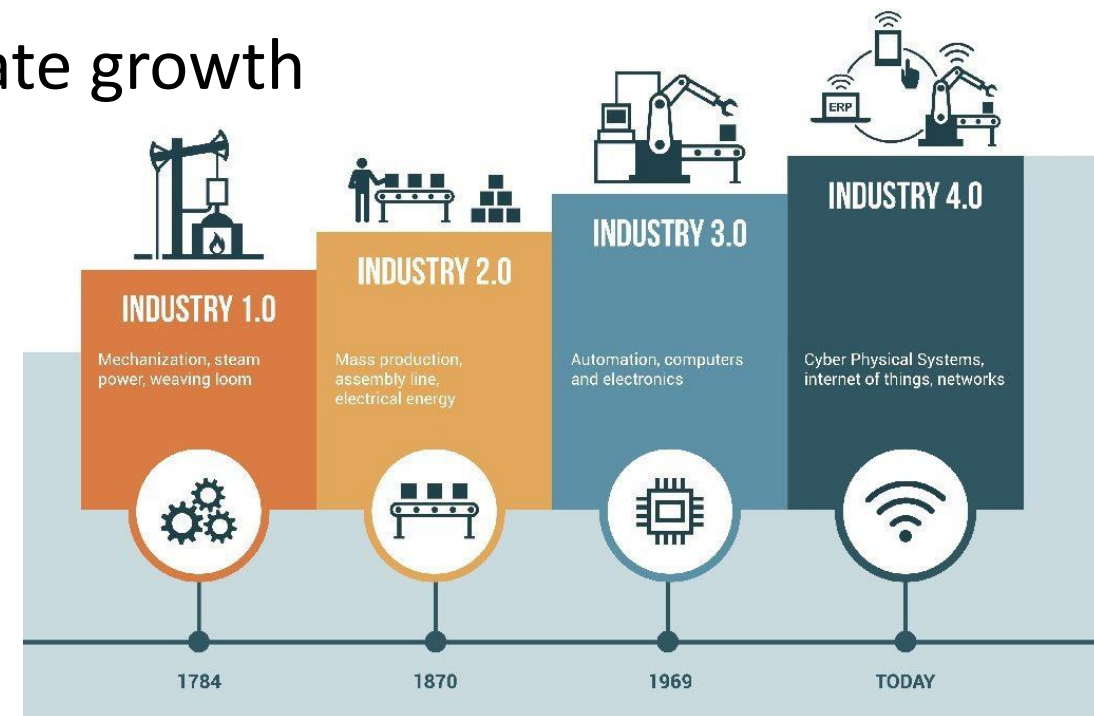
Areas Of Competitiveness

Rank	Business Environment	Human Capital	Infrastructure	Financial Sector Development	Reputational & General	Technology
1	New York	New York	New York	London	New York	New York
2	Singapore	Boston	Singapore	Los Angeles	Oxford, UK	Los Angeles
3	London	Chicago	London	New York	Cambridge, UK	Singapore
4	Hong Kong	Los Angeles	Zurich	Zurich	London	London
5	Amsterdam	San Francisco	Hong Kong	San Francisco	Hong Kong	Hong Kong
6	Zurich	Hong Kong	Chicago	Singapore	Singapore	San Francisco
7	Chicago	Washington DC	San Francisco	Chicago	Lugano	Zurich
8	San Francisco	Singapore	Boston	Boston	Stockholm	Amsterdam
9	Boston	London	Lugano	Geneva	Zurich	Chicago
10	Oxford, UK	Berlin	Los Angeles	Washington DC	Geneva	Boston
11	Los Angeles	Luxembourg	Oxford, UK	Glasgow	Los Angeles	Geneva
12	Cambridge, UK	Zurich	Geneva	Hong Kong	San Francisco	Washington DC
13	Tel Aviv	Geneva	Cambridge, UK	Dublin	Chicago	Stockholm
14	Dallas / Fort Worth	Lugano	Tel Aviv	Luxembourg	Tel Aviv	Vancouver
15	Geneva	Stockholm	Amsterdam	Tel Aviv	Boston	Edinburgh



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



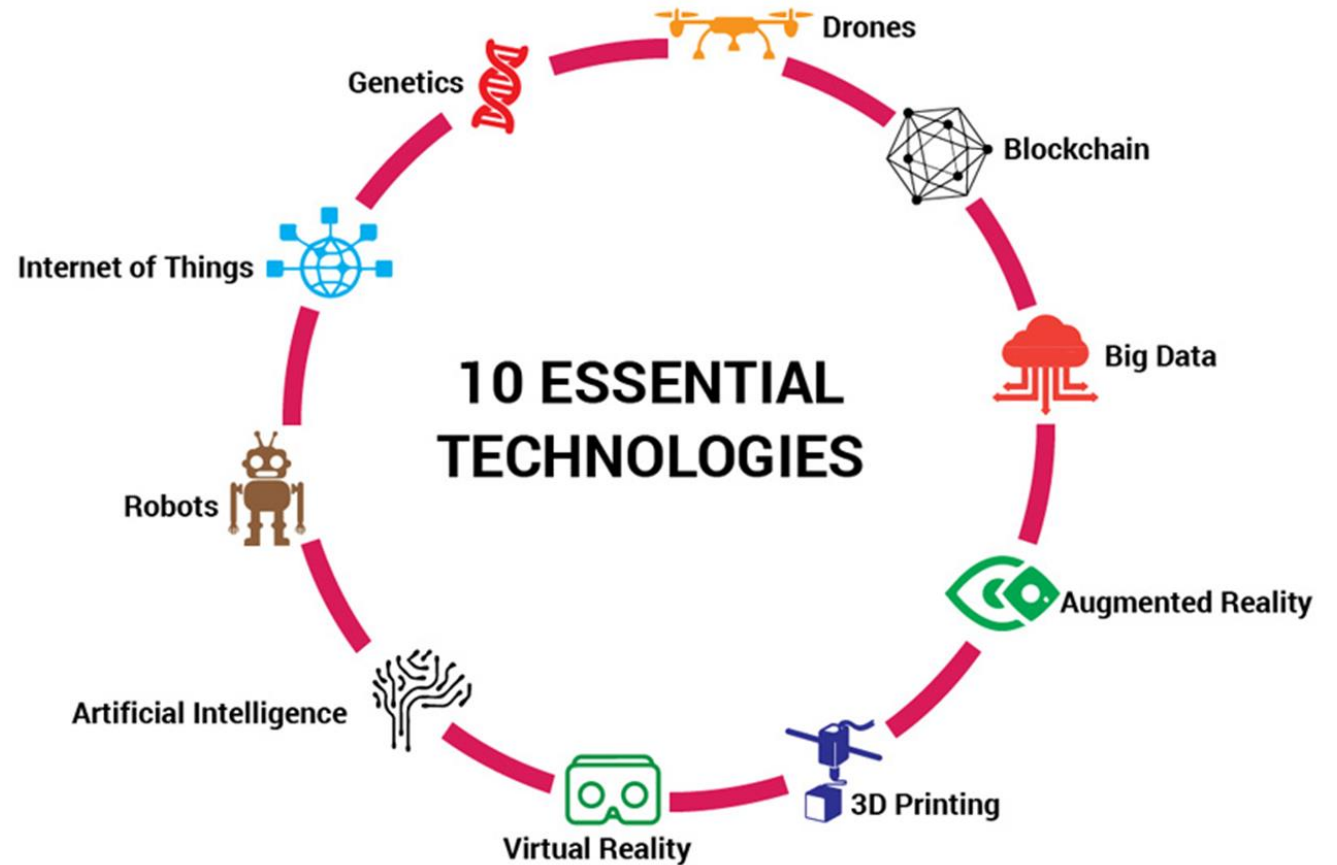
Innovation Approaches

◆ A, B, C, D

- AI
- Big Data
- Cloud Computing
- Distributed Ledgers

◆ Huawei's ROADS system

- Real Time
- On Demand
- All Online
- DIY
- Sharing (Of Information)





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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

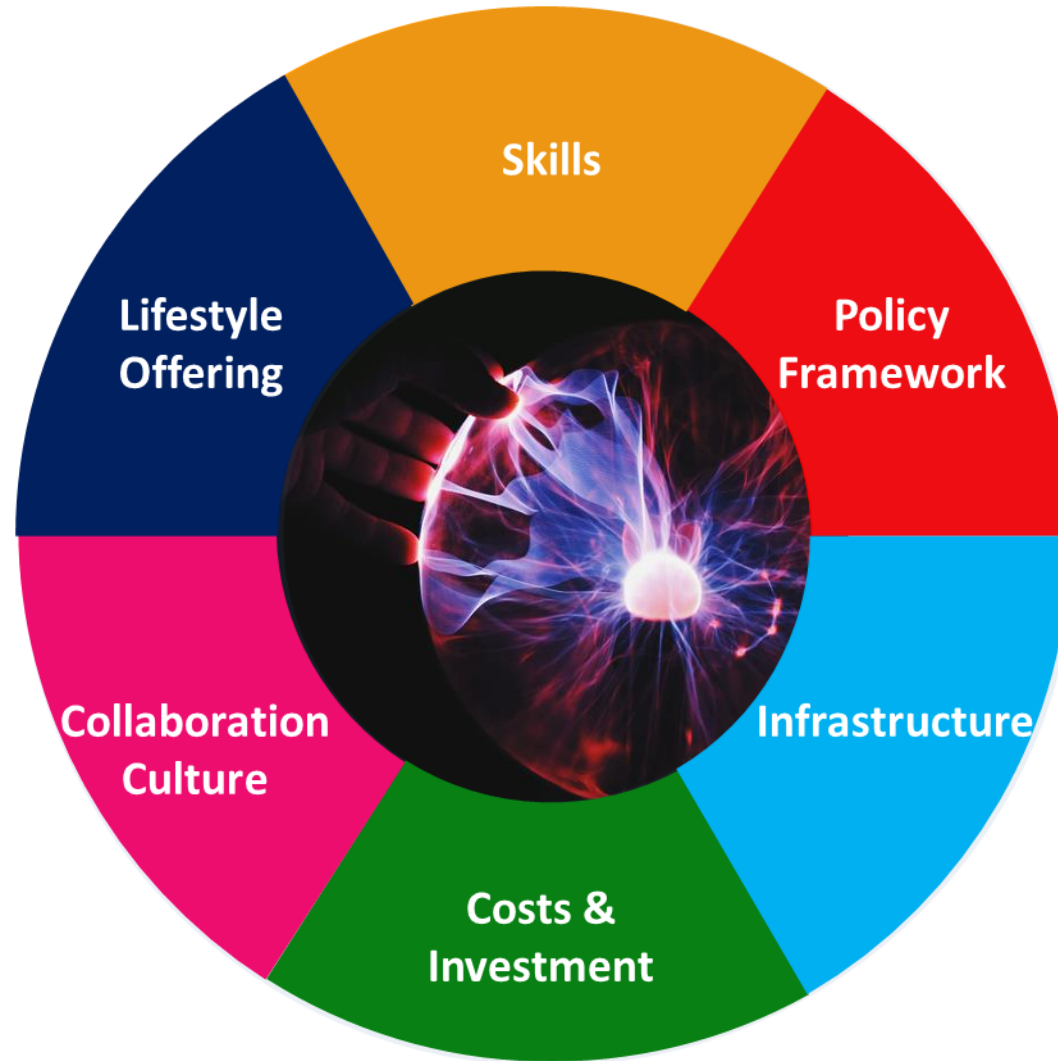




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Locational Strategies For Success





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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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