

# Inclusive cities Dynamic economies Better lives

Open For Business City Ratings 2022



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For  
Business

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# About Open For Business

Open For Business is a coalition of global companies making the case that inclusive and diverse societies are better for business and better for economic growth. The purpose of the coalition is to advance LGBTQ+ rights globally. Open For Business coalition partners share a deep-rooted commitment to diversity and inclusion in their own workplaces, and they are concerned about the spread of anti-LGBTQ+ policies in many countries in which they operate.

The coalition has live regional programs in the Caribbean, Central and Eastern Europe and East Africa, with a program in South East Asia in development. Each of these programs works with local civil society partners to mobilize advocates in local business communities and facilitate data-driven advocacy.



# About this report

The Open For Business City Ratings were first published in 2018 and updated in 2020. Two years later, this report provides the third version of the Ratings, analyzing the latest data on 145 cities and presenting a consolidated view of how inclusive and competitive each city is. To do this, we synthesize this data into the Open For Business City Ratings. They are intended to present a guide to which cities are open, inclusive and competitive – and which are not.<sup>1</sup>

## Who is this report for?

This report provides a consolidated view of how inclusive and competitive a city is, presented in the form of the Open For Business City Ratings. They are intended to present a guide to which cities are open, progressive and competitive – and which are not. And it aims to be a useful tool for the following groups of people:

For **policy makers** seeking to boost the economic performance of their city, the index can help them to benchmark their performance against competing cities.

For **businesses** considering possible new locations for offices or operations, the index can help evaluate differences between cities.

For **individuals** thinking about relocating to another city, the index can help them to think about what they are looking for and how they might fit in.

## Who are the authors?

Drew Keller, an Open For Business Researcher and recent MBA, is lead author of the report. Zamzam Osman is a contributing author, researcher, and Account Director at Brunswick. Jack Stewart is an Open For Business Fellow from Brunswick. George Perlov is Editor and Interim Executive Director of Open For Business. Jon Miller is Founder, Chair and Executive Editor of Open For Business.

## A note on terminology

The acronym LGBTQ+ is used throughout this report to refer to communities and individuals with diverse sexual orientations, gender identities, and gender expressions. The term stands for lesbian, gay, bisexual, transgender, and queer, followed by a "+" which encompasses individuals in the community not adequately defined by these terms, such as intersex individuals. Increasingly, the term LGBTIQ is used by a number of organizations and businesses. It explicitly adds intersex to the acronym. We have opted not to use it in this report as there is even less data on intersex people around the world than there is on LGBTQ+ individuals. However, we fully intend to include intersex people in the "+" of LGBTQ+, and we hope there to be more data collected on these communities to explicitly include them in future City Ratings.

## The Open For Business Research Advisory Board

The work of Open For Business is supported by a Research Advisory Board, which provides ongoing guidance and feedback, and helps to ensure the economic case for LGBTQ+ inclusion is comprehensive and up to date.

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<sup>1</sup> Cities were selected based on which were included in all datasets used to calculate the ratings (see page 36). To avoid skewing the index in favor of any one geography, we only include a maximum of 5 cities per country. The exception is the United States, which includes 10 cities. This is due to the size of the US economy and population.

# Forewords



**Christie Smith**  
Global Lead, Talent & Organization  
Accenture

The role of business has changed. Society now expects companies to create value for all of their stakeholders, rather than just its shareholders. While this expectation has been changing over the past decade, the inequities that the pandemic laid bare in our societies made it clear that this changing role of business is here to stay.

At Accenture, we know that our commitment to inclusion, diversity and equality creates an environment that unleashes innovation, allows our people to perform at their very best and underpins a culture in which everyone feels they have an equal opportunity to belong, advance and thrive. It has far reaching benefits as part of the 360° value we create for our clients, one another, shareholders, partners, and communities.

The 2022 Open For Business City Ratings is a key contribution to advancing inclusion, diversity and equality in the cities we live and work. This report shows the strong link between LGBTQ+ inclusion and economic competitiveness at the city level, all around the world. Higher levels of LGBTQ+ inclusion go hand-in-hand with innovation, talent attraction, and quality of life, all of which are key factors in a city's long-term economic competitiveness. We are proud to have supported the Open For Business City Ratings since 2018.

Beyond strengthening this economic case, the 2022 City Ratings provide an invaluable resource for businesses hoping to use their platform to advance LGBTQ+ equality globally. These ratings can help inform where LGBTQ+ workers may need additional support to feel included and where companies should focus their public efforts to advance LGBTQ+ equality. It is an essential resource for companies like Accenture that operate globally.

While this year's City Ratings paint a picture of a world that is becoming less *open for business*, there are also bright spots in every region – cities that continue to show they are beacons for LGBTQ+ inclusion. Cities partnering with companies like Accenture can light a path toward LGBTQ+ equality, even in the face of adversity in certain parts of the world.

We are thrilled to share the 2022 City Ratings with the world and look forward to creating a world that is more prosperous, inclusive, and equal for everyone.

# Forewords



**Jon Miller**  
Founder and Board Chair  
Open For Business



This report is a call to action. Many more cities have slipped down the Ratings than have risen. This is true in every region: cities are becoming less open for business. Not a single city improved its ratings in Eastern Europe and North America. There are some positives: it's encouraging to see some cities becoming more inclusive and competitive in Africa, in Asia, in Latin America and the Caribbean. But overall, it's a story of backsliding.

This means that there are millions of people around the world who feel less safe, who face more discrimination, harassment and violence, because of their sexual orientation or gender identity. This is a real human cost – and our research shows that there is a real economic cost, too.

Cities that are less open for business are also less economically resilient, according to our data. It tells us that inclusion of a city's most vulnerable citizens is important for building resilience. And as cities around the world are weathering the economic shocks from the pandemic and now the war in Ukraine, city's LGBTQ+ inclusion record can provide clues of how likely it is that its economy will bounce back.

Since we launched the Open For Business City Ratings in 2018, companies have been using the data to inform their strategies – helping decisions on location, supporting with global mobility, and shaping global DEI strategies. Companies want to do business in cities which are inclusive and competitive – and these Ratings can help.

The message is clear: cities that are LGBTQ+ inclusive are more economically dynamic, more entrepreneurial, more innovative cities. They're better places to do business. That's what the data shows. Many city policymakers know this: around the world we see cities struggling to become more open, even in countries that are hostile to LGBTQ+ people. We hope these Ratings can strengthen the case for equality.

If you're reading this report, you're not powerless. Perhaps you're in a global company, or in a local business. Maybe you're an activist. You might be a city policymaker. All of us can play a role in advancing equality, in creating inclusive economies where everyone can prosper. If you'd like to find out more about our work and get involved – we'd love to hear from you.

# Headlines

## Open, inclusive cities are more competitive

<p><b>Connections between COVID-19, economic resilience, and LGBTQ+ inclusion</b></p>	<p>The COVID-19 pandemic had a disproportionate impact on LGBTQ+ people around the world. Focusing on an LGBTQ+ inclusive recovery strategy could be key to how a city's economy responds to negative shocks, like the pandemic. <a href="#">See page 10.</a></p>
<p><b>LGBTQ+ inclusive cities develop high-value economic sectors</b></p>	<p>LGBTQ+ inclusion and economic development are tightly connected. New data in this report shows that wealthier cities tend to be more LGBTQ+ inclusive and that cities with strong financial and creative economies have the highest levels of LGBTQ+ inclusion in the world. <a href="#">See page 13.</a></p>
<p><b>Using the City Ratings to advance LGBTQ+ inclusion</b></p>	<p>The City Ratings provide businesses with a holistic view into which cities are open for business, both inclusive and competitive. They can help business leaders craft a more effective strategy for advancing LGBTQ+ inclusion, both within their workforce and in the societies in which they operate. <a href="#">See page 32.</a></p>

## Concerning global trends

<p><b>A global decline in performance</b></p>	<p>More cities fell in the ratings than improved their performance. Globally, 7% of cities received higher ratings compared to 2020, while 28% of cities received lower ratings. This trend was especially pronounced in Central/Eastern Europe and North America, two regions which scored collectively lower on LGBTQ+ inclusion metrics than they did two years ago. See the regional analyses throughout this report for in-depth explanations.</p>
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Region	Declined (%)	No change (%)	Improved (%)
Global	28	67	7
Africa & Middle East	15	75	10
Asia Pacific	20	70	10
Central/Eastern Europe	35	55	10
North America	30	60	10
Latin America & the Caribbean	25	65	10
Western Europe	10	80	10

Figure 1: Change in individual city ratings by region since 2020



<p><b>Worsening corruption in Asia Pacific – a warning for LGBTQ+ inclusion?</b></p>	<p>Several cities in the region, including Hong Kong, Manila, and Australian and Indian cities, saw worsening corruption and decline in civil liberties, which dragged down their ratings. This could spell trouble for LGBTQ+ inclusion and these cities' long-term ratings. <a href="#">See page 20.</a></p>
<p><b>Polarization accelerates in Eastern Europe</b></p>	<p>There is a growing divide in social attitudes toward LGBTQ+ people in Central and Eastern Europe. The highest rated cities are growing more inclusive while the lowest rated are growing more hostile toward the LGBTQ+ community. <a href="#">See page 22.</a></p>
<p><b>Stalled progress in US cities</b></p>	<p>Many cities in the US fell in the ratings this year. While many have been strong supporters of LGBTQ+ inclusion, threats to civil liberties and rule of law at the national level could be trouble for these cities in the future. <a href="#">See page 24.</a></p>

## Cities can lead the way on LGBTQ+ inclusion

<p><b>Cities lead the way to ban conversion therapy</b></p>	<p>Since the 2020 Open For Business City Ratings were published, several cities have banned conversion therapy ahead of their national governments. <a href="#">See page 12.</a></p>
<p><b>Amsterdam is the world's most open for business city – for the second time</b></p>	<p>Amsterdam is the highest scoring city in this year's City Ratings, further cementing this position that it first attained in 2020. This shows Amsterdam's economic dynamism, global connectivity, social inclusion, and commitment to sustainability. <a href="#">See page 29.</a></p>
<p><b>Slow and steady progress in Nairobi</b></p>	<p>Nairobi (DD rating) moved up in the ratings this year for the first time since the Open For Business City Ratings were published in 2018. There were small gains in LGBTQ+ inclusion, driven by a strong local LGBTQ+ movement, and a focus on building a "Silicon Savannah". Could this continue, or will the city remain not open for business? <a href="#">See page 18.</a></p>
<p><b>A focus on inclusion balanced against economic troubles in Latin America</b></p>	<p>Every city in Latin America suffered economic damage from the COVID-19 pandemic. However, several, including Mexico City, San Jose, and Santiago, maintained their ratings due to a focus on LGBTQ+ inclusion. <a href="#">See page 27.</a></p>

# Global Trends

## The COVID-19 pandemic has had a disproportionate impact on LGBTQ+ communities

The COVID-19 pandemic has had devastating effects in every corner of the globe. While the pandemic has impacted everyone in some form, LGBTQ+ communities, as some of the most marginalized in society, have often been disproportionately impacted. Various civil society organizations have documented these impacts, including lost livelihoods, disruptions to healthcare access, elevated risk of violence, and abuse of state power.<sup>i</sup> Work done by OutRight Action International, ILGA-Europe, and the ASEAN SOGIE Caucus highlights how LGBTQ+ individuals in cities around the world have been impacted:

- The leader of the **Moscow** Community Center reported, “In Moscow we have an LGBTIQ shelter - the only one in Russia, and we have received a huge number of new requests, disproportionately from transgender people. The shelter is at full capacity and under quarantine, so we can’t help the inflowing requests.”<sup>ii</sup>
- In **Istanbul** and across Turkey, politicians blamed the pandemic on LGBTQ+ people and used expanded state power to ban the drawing of rainbows, a symbol of LGBTQ+ support, in schools.<sup>iii</sup>
- In **Italy** and **France**, LGBTQ+ youth centers saw a large increase in individuals accessing their services during the pandemic.<sup>iv</sup>
- In **Indonesia**, hundreds of transgender women lost their daily income, many of whom work in **Jakarta**, due to their overexposure to service industries.<sup>v</sup>
- In **San Salvador**, a transgender woman reported that “Transgender women and gay men are at particular risk of harassment from the police when asked to present their identification documents” associated with COVID-19 lockdowns.<sup>vi</sup>
- LGBTQ+ youth experienced loneliness during the pandemic at significantly higher rates than straight, cisgender youth (35% of LGBTQ+ youth reported being much lonelier after the pandemic, compared to 22% of straight, cisgender youth). One driver of this is LGBTQ+ youth not feeling like they can be themselves at home.<sup>vii</sup>

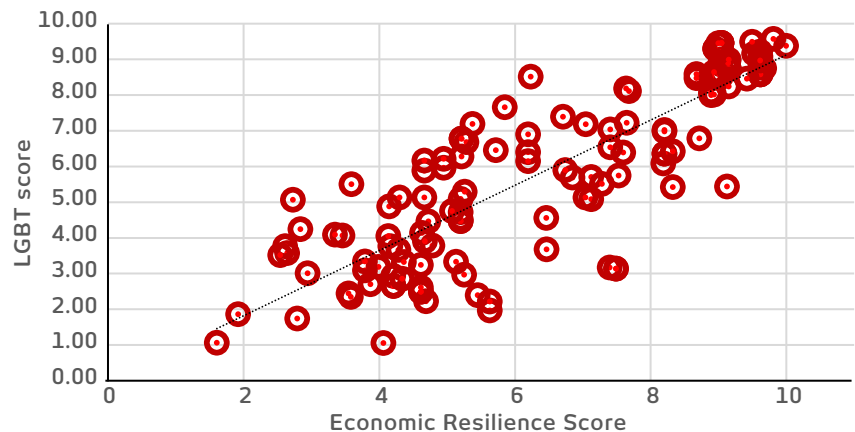


The COVID-19 pandemic had a disproportionate impact on LGBTQ+ people around the world. Focusing on an LGBTQ+ inclusive recovery strategy could be key to how a city’s economy responds to negative shocks, like the pandemic.

**For cities around the world,  
LGBTQ+ inclusion and economic  
resilience are closely linked**

This disproportionate impact on LGBTQ+ people has implications for how cities economically recover from the pandemic. The UN-Habitat defines urban resilience as the “measurable ability of any urban system, with its inhabitants, to maintain continuity through all shocks and stresses, while positively adapting and transforming toward sustainability.”<sup>viii</sup> The organization has created a network of cities, mainly in the Global South, to share strategies and best practices to economically recover from the COVID-19 pandemic. The network operates on five urban resilience principles, which include promoting inclusiveness “particularly of those in vulnerable situations,” multi-stakeholder engagement, and a focus on guaranteeing human rights.<sup>ix</sup> In other words, inclusion of the most vulnerable – which often includes the LGBTQ+ community – is essential for economic resilience.

Data in this report supports this proposition. Across every region, economic resilience shows a strong positive correlation (0.85) with LGBTQ+ inclusion, defined in this report as a mix of social, political, and legal support for the LGBTQ+ community. The chart below plots each city’s economic resilience (measured by the FM Global Resilience Index) and LGBTQ+ inclusion.



**Figure 2: The economic resilience of each city (x-axis) from the FM Global Resilience Index vs. the LGBTQ+ inclusiveness of the city (y-axis) from the measures included in the City Ratings. See the section “About the Open For Business City Ratings” below for more details on included data.**

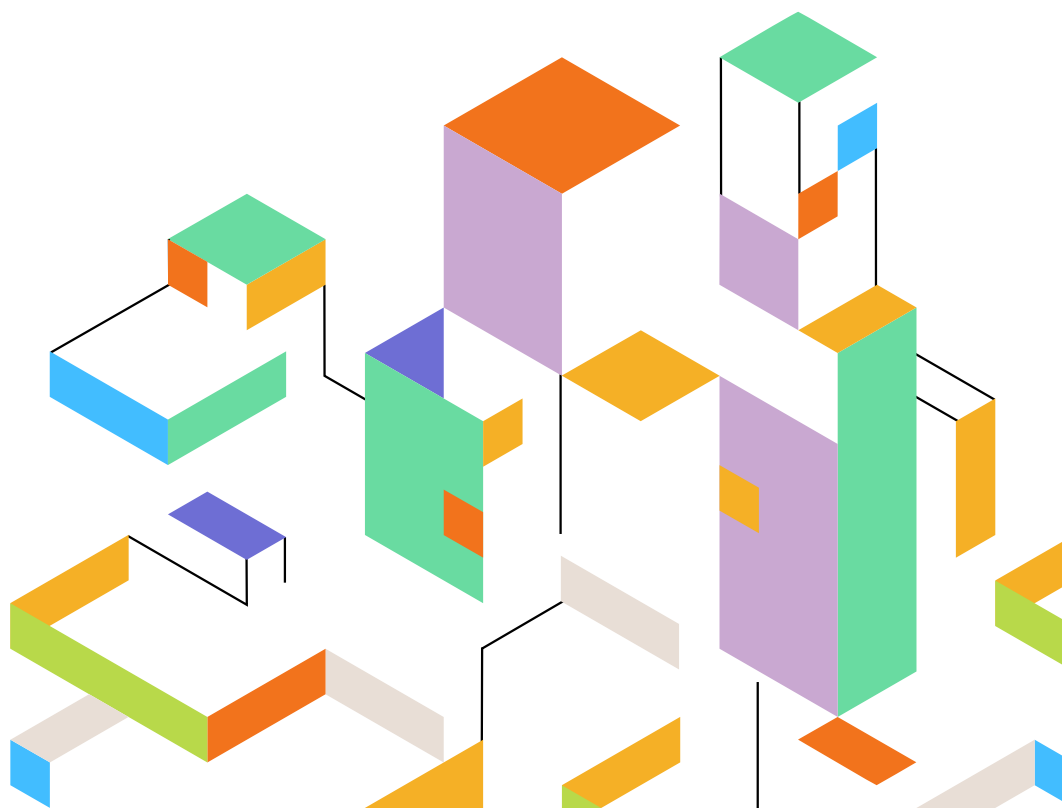
What does this tell us? First, it empirically supports the UN-Habitat’s claim that inclusion of a city’s most vulnerable citizens is important for building resilience, an important lesson for policymakers around the world. Second, it suggests that business leaders can look at a city’s LGBTQ+ inclusion record to provide clues of how likely that city is to bounce back from economic shocks. And last, it can help job seekers understand which locations may have better economic prospects post-pandemic.

## Cities lead the way on banning conversion therapy

Since the 2020 City Ratings were published, several cities have banned conversion therapy, even though the practice is still legal nationally in their countries. According to the International LGBTI Association (ILGA), conversion therapy refers to any practice with the “goal of achieving gender expressions that align with stereotypical binary gender norms, a cisgender identity, and/or heterosexual desire, behaviour or identity.”<sup>x</sup> Several organizations, including the UN Independent Expert on Sexual Orientation and Gender Identity, equate the practice with torture.<sup>xi</sup>

It is still legal in most of the world, but a growing number of cities and countries have banned it. Notably, a few cities have banned the practice despite it not being banned nationwide or statewide, including:

- **Brisbane, Canberra, and Melbourne** in Australia banned the practice in 2020 and 2021 through their state governments.<sup>xii xiii</sup> Melbourne’s ban has been called “world-leading” due to its development in consultation with survivors of conversion therapy.<sup>xiv</sup>
- **Chennai**, India instituted a ban in 2021 after a judge ruled the practice undermined the right to privacy.<sup>xv</sup> This prompted India’s National Medical Commission to label the practice as professional misconduct nationwide, though there is no legal ban.<sup>xvi</sup>
- **Mexico City** banned conversion therapy in 2020.<sup>xvii</sup> It was the first state in Mexico to do so.
- **Basel**, Switzerland banned conversion therapy in 2021. However, it is unclear how the ban holds up legally, so local politicians are pushing for a ban at the national level.<sup>xviii</sup>
- Several cities and states in the **United States** ban conversion therapy. This includes the top-rated cities of **Boston, Chicago, Los Angeles, Minneapolis, New York City, San Francisco, and Washington DC**. Unfortunately, the US also has cities that have overturned the bans, such as in Atlanta and Miami.<sup>xix</sup>



# The Economic Case for LGBTQ+ Inclusive Cities

In the previous two versions of this report, released in 2018 and 2020, we laid out the economic case for LGBTQ+ inclusive cities. We showed that these cities tend to be more innovative, attract high-skilled workers, and have a higher quality of life.

Data provided in this report provides further strength to this economic case. Using updated datasets, we provide a new set of correlations that shows an even deeper relationship between LGBTQ+ inclusion and economic competitiveness in cities. It is important to remember that correlation does not equal causation. The relationship between inclusion and competitiveness is complex, and isolating causal effects is challenging. It could be the case that the economic policies that make cities more economically competitive also cause them to be more open and inclusive. The most likely explanation is that inclusion and economic competitiveness are mutually reinforcing. Cities which are open for business signal that they are welcoming places for talented individuals and encourage the free flow of ideas which spurs innovation.<sup>xx</sup> This enhances their competitiveness, which leads to more open-mindedness, creating a virtuous cycle.

## LGBTQ+ inclusion, GDP, and moving up the value chain

Data in this report shows that LGBTQ+ inclusion is correlated with overall levels of economic development in cities. The chart below shows the strong positive correlation (0.65) between a city's LGBTQ+ inclusion score and the log of its GDP per capita. This relationship is further strengthened when cities in countries that rely on extractives are removed from the sample,<sup>2</sup> which raises the correlation to 0.78. This suggests that LGBTQ+ inclusion is an important strategy for cities that need to develop diversified economies.

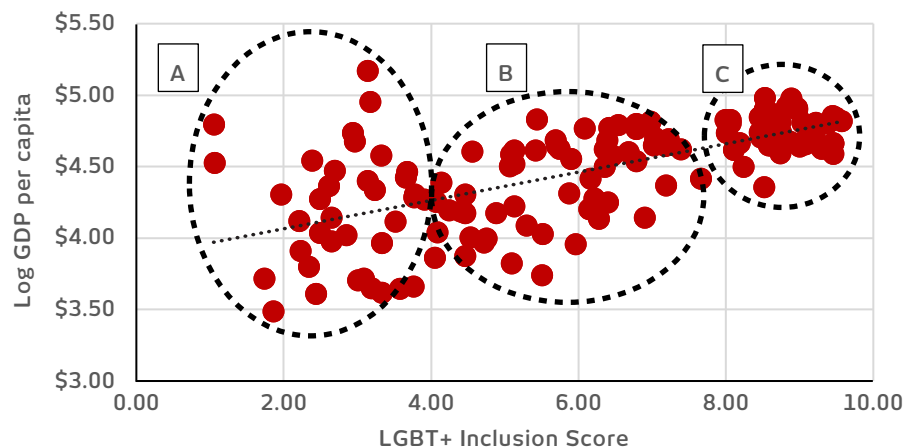


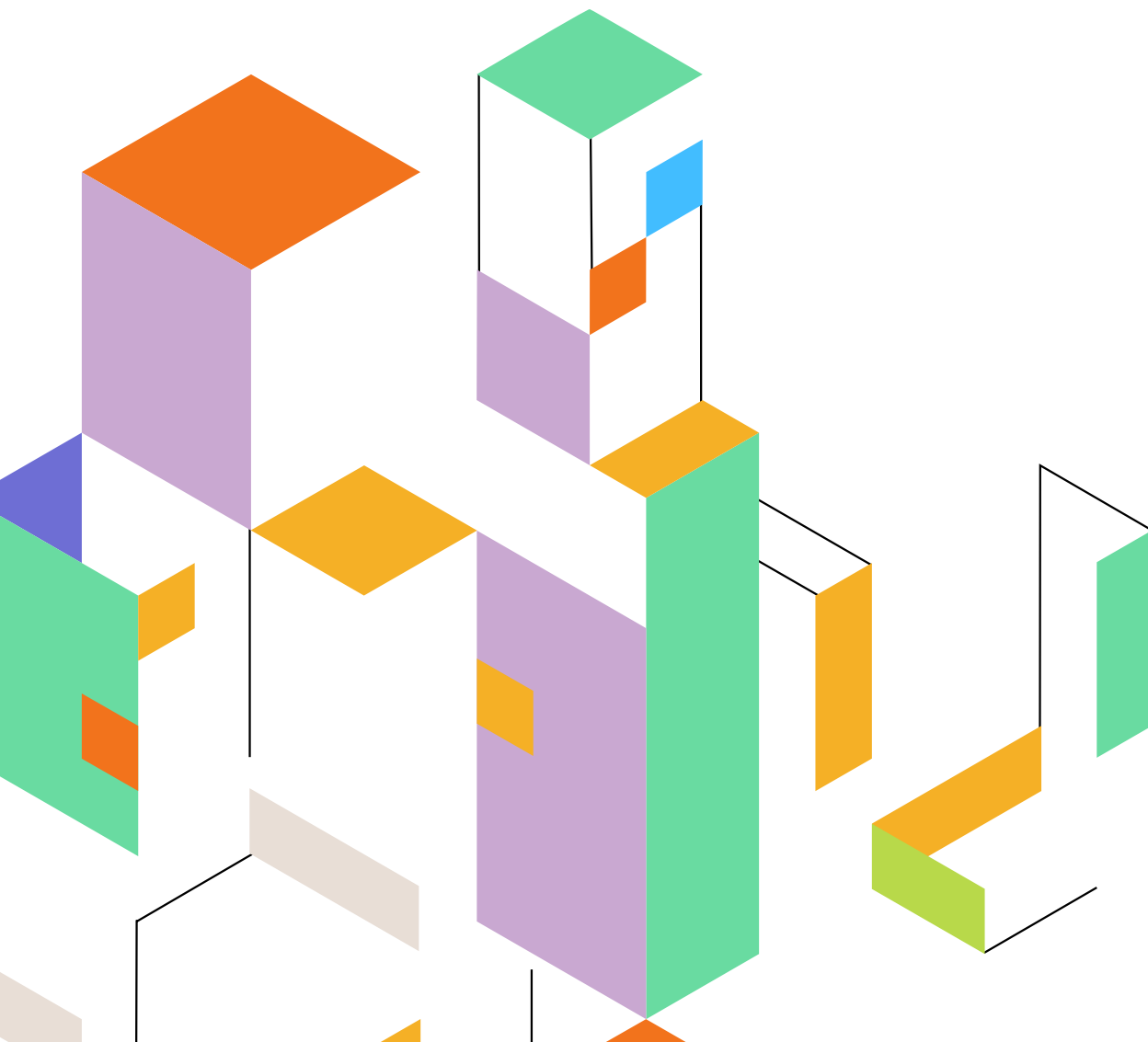
Figure 3: The LGBTQ+ Inclusion score (x axis) vs. log GDP per capita (y axis) for 145 cities in the City Ratings.

The chart above also shows an interesting pattern that mirrors the “City Wealth Creation Curve” created by the World Bank.<sup>xxi</sup> This curve suggests that cities with higher GDP per capita also tend to derive more economic value from high value-added industries, such as finance. It identifies three categories of cities: **Market towns** which have high levels of retail and tourism business, **production centers** which tend to be manufacturing hubs, and **creative and financial hubs** which have high levels of financial services and creative industries.

<sup>2</sup> Considered 10% of GDP of the country the city is located in based on World Bank data; excluded cities include Abu Dhabi, Almaty, Baku, Doha, Dubai, Kuwait City, Moscow, St. Petersburg, and Tehran.

Comparing city GDP per capita with LGBTQ+ inclusion identifies three categories of cities which closely mirror these.

- a. Cities in this category are identified by their low levels of LGBTQ+ inclusion and high reliance on one particular industry. Interestingly, this group includes both wealthy and poor cities. The wealthy cities in this group primarily rely on extractives. Examples include Abu Dhabi, Doha, and Almaty. Poor cities in this group tend to have economies reliant on tourism, low-value manufacturing, and micro retail. Examples include Dhaka, Hanoi, and Nairobi.
- b. Cities in this category have average levels of LGBTQ+ inclusion and GDP per capita. They tend to be cities with high-value manufacturing or shared service centers and the beginnings of startup hubs. Examples include Warsaw, Tallinn, Manila, and Bangalore. This category also includes Hong Kong and Singapore, which have highly developed financial sectors. However, the lack of inclusion and civil liberties in these cities may threaten their future competitiveness.
- c. Cities in this category have high levels of LGBTQ+ inclusion and highly developed financial and creative industries. Examples include London, New York, San Francisco, Berlin, Sydney, and Toronto. These cities have successfully created the virtuous cycle in which inclusion and competitiveness are mutually reinforcing.



# About the Open For Business City Ratings

## What does it mean for a city to be open for business?

It means a number of things: to start with, it means a city is easy to operate in, with low barriers to setting up and running a business; and it has a transparent system of governance with a low risk of corruption. It also has a strong digital infrastructure; it's a hub for skills and talent and has a healthy "innovation ecosystem". It has a good quality of life and a dynamic cultural environment. Finally, an inclusive and competitive city is globally connected and a welcoming place for lesbian, gay, bisexual, transgender, and queer (LGBTQ+) people, who are often among the most marginalized communities around the world.

There are dozens of reports, data, indices and rankings that compare these various attributes of cities around the world. Open For Business has analyzed many of these in its previous City Ratings report in 2018 and 2020 to show that LGBTQ+ inclusive cities are more competitive, more productive, and ultimately more prosperous. So why does the world need another ranking?

Although there is a wealth of data on the many different perspectives on city performance, this is the only one to provide a consolidated view of how inclusive and competitive a city is. To do this, we synthesize this data into the Open For Business City Ratings:

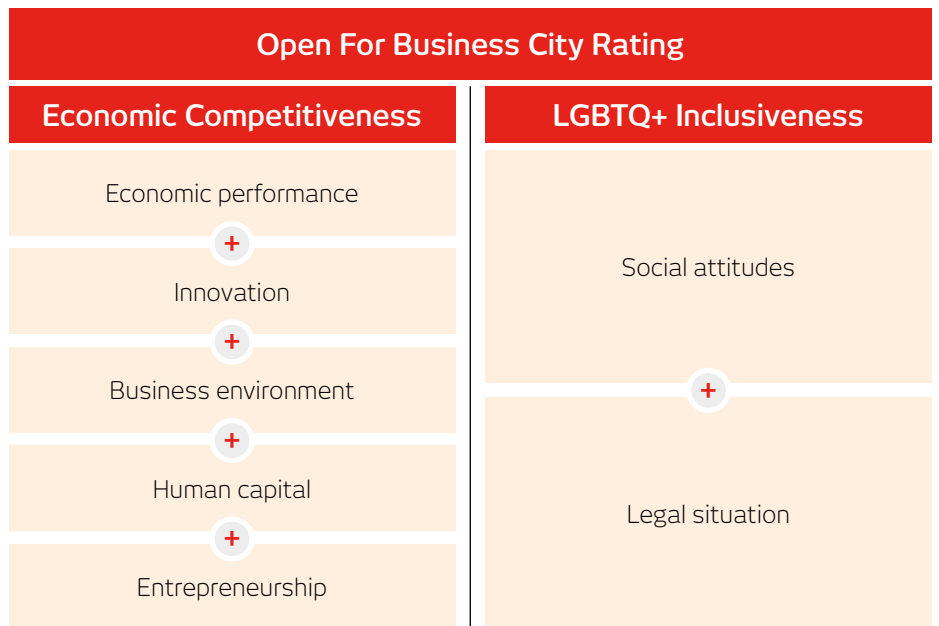


Figure 4: The Open For Business City Ratings are comprised of two categories, Economic Competitiveness and LGBTQ+ Inclusiveness. These categories are in turn comprised of various sub-categories.

# Open For Business City Ratings 2022

## City is fully open for business

<b>AAA</b>	Amsterdam Helsinki Zurich	Berlin London	Boston <b>Oslo</b>	Copenhagen Stockholm	Dublin Toronto
<b>AA</b>	Atlanta <b>Chicago</b> <b>Luxembourg</b> <b>New York City</b> <b>Sydney</b>	Auckland Edinburgh Melbourne Ottawa <b>Vancouver</b>	Basel Geneva Minneapolis Paris Vienna	Bern Glasgow Montreal <b>Perth</b> <b>Washington DC</b>	Calgary Los Angeles Munich <b>San Francisco</b> <b>Wellington</b>
<b>A</b>	Adelaide <b>Brussels</b> Madrid	Barcelona <b>Dallas</b> Stuttgart	Belfast Frankfurt Taipei	<b>Birmingham</b> Hamburg	Brisbane <b>Houston</b>

## City is partially open for business

<b>BBB</b>	<b>Hong Kong</b> Tel Aviv	Lisbon Tokyo	<b>Lyon</b>	Singapore	Tallinn
<b>BB</b>	Ljubljana Rome	Milan Santiago	Montevideo <b>Seoul</b>	Osaka Vilnius	<b>Prague</b>
<b>B</b>	Athens San Jose	Budapest Sao Paulo	<b>Buenos Aires</b> <b>Warsaw</b>	Nagoya Yokohama	Riga
<b>CCC</b>	<b>Brasilia</b> Mexico City	Bratislava Rio de Janeiro	<b>Busan</b>	Cape Town	<b>Medellin</b>
<b>CC</b>	<b>Abu Dhabi</b> <b>Bucharest</b> Kuala Lumpur	<b>Bangalore</b> <b>Dubai</b> <b>Sofia</b>	Bangkok Durban <b>Wroclaw</b>	Belgrade <b>Guadalajara</b> <b>Zagreb</b>	<b>Bogota</b> Johannesburg
<b>C</b>	Beijing <b>Manila</b>	Chennai <b>Monterrey</b>	<b>Delhi</b> <b>Mumbai</b>	<b>Ho Chi Minh City</b> <b>Panama City</b>	Lima Shanghai

## City is not open for business

<b>DDD</b>	<b>Chongqing</b> Istanbul <b>Quito</b> Tunis	Doha Kiev Santo Domingo	Guangzhou Kingston Skopje	Hanoi La Paz <b>Tbilisi</b>	<b>Hyderabad</b> Port of Spain <b>Tirana</b>
<b>DD</b>	Almaty Jakarta <b>San Salvador</b>	<b>Amman</b> Kuwait City Sarajevo	<b>Asuncion</b> <b>Moscow</b> St Petersburg	Colombo <b>Nairobi</b> <b>Tegucigalpa</b>	Guatemala City Phnom Penh
<b>D</b>	Cairo	<b>Casablanca</b>	Dhaka	Rabat	
<b>E</b>	Addis Ababa Tehran	<b>Baku</b>	Dakar	Dar es Salaam	Lagos



# Analysis

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# Africa and the Middle East

## City is partially open for business

<b>BBB</b>	Tel Aviv				
<b>CCC</b>	Cape Town				
<b>CC</b>	<b>Abu Dhabi</b>	<b>Dubai</b>	Durban	Johannesburg	

## City is not open for business

<b>DDD</b>	Doha	<b>Istanbul</b>	Tunis		
<b>DD</b>	<b>Amman</b>	Kuwait City	<b>Nairobi</b>		
<b>D</b>	Cairo	<b>Casablanca</b>	Rabat		
<b>E</b>	Addis Ababa	Dakar	Dar es Salaam	Lagos	Tehran

\*Cities listed in green have improved their rating since 2020. Those in red have declined since 2020.



## Nairobi – slow and steady progress

Nairobi has moved up in the rankings for the first time since we started rating cities. This was driven by an increased entrepreneurship score and some small improvements in LGBTQ+ inclusion. Nairobi has focused on creating a strong innovation ecosystem for years, which has led to a number of start-up hubs in the city. Most recently, Visa announced its plans to launch its first African innovation studio in Nairobi, citing “a fast-growing region with a tech-savvy population.”<sup>xxii</sup> In fact one prominent community for entrepreneurs, Startup Grind, hosts networking mixers for LGBTQ+ founders in Nairobi, showcasing the connection between innovation and inclusion.<sup>xxiii</sup> Additionally, Kenya became the first country in Africa to include intersex individuals in the national census.<sup>xxiv</sup> On top of improving social attitudes toward the LGBTQ+ community, these could be signals for Nairobi’s continued climb in the ratings. However, continued criminalization of same-sex acts and low social acceptance of the community continues to keep it in the *not open for business* category.



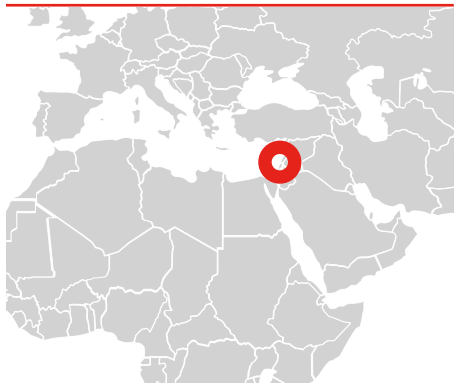
Nairobi (DD rating) moved up in the ratings this year for the first time. There were small gains in LGBTQ+ inclusion, driven by a strong local LGBTQ+ movement, and a focus on building a “Silicon Savannah”



### Abu Dhabi and Dubai – pushing the limits of performance without inclusion

For many people, Abu Dhabi and Dubai, the political and economic capitals of the United Arab Emirates, may evoke images of glimmering, modern cities with thriving economies. And there is no doubt that they have largely become economic success stories. Dubai scores especially well on economic resilience, innovation, FDI inflows, global trade, and ease of starting a business. These are certainly necessary for a city to be considered open for business.

However, both cities have one of the lowest LGBTQ+ inclusion scores of all cities included in the ratings. They have national laws that punish same-sex intimacy with the death penalty and regional laws that punish such acts with 14 years in prison. Transgender people are not able to change their legal gender on official documents. This criminalization could have long-term implications for Abu Dhabi's and Dubai's competitiveness and ability to attract talent. For instance, in a survey of LGBTQ+ professionals conducted by Open For Business and Deloitte, fewer than 1% of respondents said they would choose the UAE as their first choice for an international assignment.<sup>xxv</sup> This could also have implications for businesses hoping to create a diverse and inclusive workplace.



### Tel Aviv leads the region with recent progress on LGBTQ+ rights, but there are early signs of trouble

Tel Aviv is the clear leader in the region, with a rating that is a full three levels above Cape Town, the next closest contender. The city has a combination of strong economic competitiveness and high levels of LGBTQ+ inclusion. Economically, Tel Aviv has the region's highest scores in entrepreneurship, innovation, and human capital, all of which are conditions for long-term economic growth. This is paired with strong legal protections for the LGBTQ+ community. And in February 2022, Israel's Health Ministry effectively banned conversion therapy, by forbidding medical professionals to engage in the practice.<sup>xxvi</sup> Tel Aviv also provides same-sex couples with the same benefits as married couples, even though the rest of Israel does not.<sup>xxvii</sup>

However, there are still open questions about Israel's future performance in the City Ratings. For instance, social attitudes toward the LGBTQ+ community across Israel have fallen since 2000, and the transgender community is not included in the conversion therapy ban. Corruption and civil liberties have also declined since 2018. These indicators are sometimes early signals that a city is becoming less open and inclusive. Additionally, many LGBTQ+ activists contend that progressive policies toward LGBTQ+ people in Israel are not matched by a respect for human rights in Palestine, and some have even asserted that this is a form of "pinkwashing."<sup>xxviii</sup>

# Asia Pacific

## City is fully open for business

<b>AA</b>	Auckland	Melbourne	<b>Perth</b>	Sydney	<b>Wellington</b>
<b>A</b>	Adelaide	Brisbane	Taipei		

## City is partially open for business

<b>BBB</b>	<b>Hong Kong</b>	Singapore	Tokyo		
<b>BB</b>	Osaka	<b>Seoul</b>			
<b>B</b>	Nagoya	Yokohama			
<b>CCC</b>	<b>Busan</b>				
<b>CC</b>	<b>Bangalore</b>	Bangkok	Kuala Lumpur		
<b>C</b>	Beijing	Chennai	<b>Delhi</b>	<b>Ho Chi Minh City</b>	<b>Manila</b>
	<b>Mumbai</b>	Shanghai			

## City is not open for business

<b>DDD</b>	<b>Chongqing</b>	Guangzhou	Hanoi	<b>Hyderabad</b>	
<b>DD</b>	Almaty	Colombo	Jakarta	Phnom Penh	
<b>D</b>	Dhaka				

\*Cities listed in green have improved their rating since 2020. Those in red have declined since 2020.



## A canary in the coal mine? Worsening corruption and eroding civil liberties

In contrast to some bright spots on LGBTQ+ inclusion in the region (see below), the worrying trend of worsening corruption and eroding civil liberties threatens progress among some of the region's top performers. Australia has been one of the "most significant decliners" over the past decade in Transparency International's Corruption Perceptions Index. This is driven by a failure to enact a national commission to restrict corruption and poor enforcement of bribery laws, creating risks for businesses operating in Australia and the region.<sup>xxxix</sup> The Philippines also received its lowest ever score on corruption perceptions, mainly due to the difficulty citizens face when "speak[ing] up against corrupt activities."<sup>xxxx</sup> India and Hong Kong were singled out for eroding civil liberties by Freedom House's Freedom in the World Index. In 2021, India fell from being classified as "free" to only "partly free" due to "rising violence and discriminatory policies affecting the Muslim population."<sup>xxxxi</sup> Hong Kong also saw a precipitous drop in civil liberties in the past year, after activists were arrested and electoral laws were altered by Beijing.<sup>xxxxii</sup>

These trends will likely have negative repercussions for both economic performance and LGBTQ+ inclusion. Studies have found strong connections over time between economic development and both strong civil liberties<sup>xxxxiii</sup> and low corruption.<sup>xxxxiv</sup> And previous Open For Business reports have shown strong correlations between a country's performance on the Corruptions Perceptions Index and Freedom in the World Index and its level of LGBTQ+ inclusion.<sup>xxxxv</sup> Put together, these twin trends of eroding civil liberties and worsening corruption may be an early warning sign of reduced competitiveness and inclusion in the region.



### Chennai – on the leading edge of inclusion and innovation

The past two years have seen a lot of “firsts” for Chennai. In June 2021, Tamil Nadu, the state where Chennai is located, became the first in India to ban conversion therapy after a ruling from the Madras High Court.<sup>xxxvi</sup> The court also ruled that police in Tamil Nadu should be punished if they harass members of the LGBTQ+ community, making it the first state in India to issue such guidance.<sup>xxxvii</sup> Chennai has also established strong LGBTQ+ cultural institutions, including one of the first cultural festivals for the queer community in India, the Queer LitFest.<sup>xxxviii</sup> Also in 2021, Chennai created a position for India’s first Innovation Officer of a city<sup>xxxix</sup> and built the Chennai Innovation Hub to foster and promote innovation across different verticals.<sup>xl</sup> The combination of Chennai’s leadership on LGBTQ+ inclusion and innovation points to a potentially bright future for the city.

While these aspects suggest Chennai should have improved its score, it maintained its C rating from 2020. This is primarily driven by COVID’s impact on India’s national economic performance. GDP growth and the trade to GDP ratio fell sharply due to shutdowns and global supply chain disruptions. These trends will likely be temporary. For instance, the IMF is expecting India’s GDP to grow 8% in 2022, which, while lower than the 9% initially forecast, is much higher than the 1% average growth since 2018.<sup>xli</sup> Improving growth numbers will likely see Chennai’s rating improve in future City Ratings.



Strong LGBTQ+ cultural institutions, and a new Innovation Hub, suggest Chennai (C rating) should have improved its score, but it maintained its rating from 2020. This is primarily driven by COVID’s impact on India’s national economic performance.



### Perth – Improving through inclusion

Perth is the only Australian city to move up in this year’s ratings, achieving a high AA rating. While the city saw improvements across most economic indicators, the most notable change was the introduction of Perth’s first LGBTQIA+ Plan, which was adopted in late 2021. The Plan “outlines actions in seven key areas,” including safety, education, homelessness, and healthcare.<sup>xlii</sup> It was developed through an extensive stakeholder engagement process and will be monitored on a quarterly basis until its completion in 2024. Although business is not the main audience of the Plan, it establishes goals to help businesses with training and capacity building on LGBTQ+ inclusion.



Since the 2020 City Ratings were published, several cities, including Melbourne, Australia (AA rating) have banned conversion therapy, even though the practice is still legal nationally in their countries.

# Central and Eastern Europe

## City is partially open for business

<b>BBB</b>	Tallinn				
<b>BB</b>	Ljubljana	<b>Prague</b>	Vilnius		
<b>B</b>	Athens	Budapest	Riga	<b>Warsaw</b>	
<b>CCC</b>	Bratislava				
<b>CC</b>	Belgrade	<b>Bucharest</b>	<b>Sofia</b>	<b>Wroclaw</b>	<b>Zagreb</b>

## City is not open for business

<b>DDD</b>	Kiev	Skopje	<b>Tbilisi</b>	<b>Tirana</b>
<b>DD</b>	<b>Moscow</b>	Sarajevo	St Petersburg	
<b>E</b>	<b>Baku</b>			

\*Cities listed in red have declined since 2020.



## Tallinn – only open and inclusive city

Tallinn is the highest ranked city in this region and the only city in Central and Eastern Europe to achieve a BBB rating, driven by strong performance in innovation, business environment, human capital, and relatively high LGBTQ+ inclusion scores. The city is the clear regional leader in innovation and startup activity. According to Atomico, Estonia has the highest number of startups per capita of any country in Europe, with 1,107 per million residents. Its startups are also Europe's second-best capitalized, attracting \$1,252 per capita.<sup>xliii</sup> This activity is supported by strong human capital and a supportive business environment. Tallinn has one of the best qualities of life in the region and has the highest number of top-rated universities per capita. Additionally, it scores the highest in the region on networked readiness and strength of accounting standards, suggesting a strong foundation for business to perform well.

At the same time, attitudes toward LGBTQ+ people are showing signs of progress. Since 2000, social attitudes, measured by the Williams Institute's Global Acceptance Index, have improved by 12% (compared to a decrease of 14% regionally). According to a 2021 survey, a majority of Estonians believe that same-sex attraction is acceptable for the first time.<sup>xliv</sup> Estonia is also one of the only regional members of the Equal Rights Coalition, an intergovernmental group dedicated to protecting LGBTQ+ rights.<sup>xlv</sup>

However, it should be noted that there is still much progress to be made for Tallinn to be considered fully open for business. Marriage equality is still not legal and conversion therapy is not banned. Additionally, according to local LGBTQ+ organizations, the city government is not openly LGBTQ+ friendly and needs to do more to clearly signal political support for the LGBTQ+ community. Correcting these elements would clearly cement Tallinn's status as a regional beacon for LGBTQ+ inclusion.



Tallinn (BBB rating) is the highest ranked city in the Central and Eastern Europe region, driven by strong performance in innovation, business environment, human capital, and relatively high LGBTQ+ inclusion scores.

### Polarization accelerates

In 2020, we found that there was a growing divide in social attitudes toward LGBTQ+ people in Central and Eastern Europe. The highest rated cities were growing more inclusive while the lowest rated were growing more hostile toward the LGBTQ+ community.

Unfortunately, this trend has only accelerated in the past two years. In 2020, cities that scored in the B range registered no change in social attitudes since 2000, while cities that scored in the D and E range saw a 30% decline in social attitudes. This year, the highest rated cities saw a 4% increase in social attitudes, while those at the bottom saw a 36% decline. This widening gulf has implications for the region's competitiveness. Evidence shows that LGBTQ+ inclusive cities are more competitive, more innovative, and are better able to attract and retain talent. As these cities, which include Tallinn, Prague, Budapest, and Athens, continue to grow and develop thriving innovation ecosystems, cities which are closed may see increased brain drain and dampened competitiveness to their neighbors.

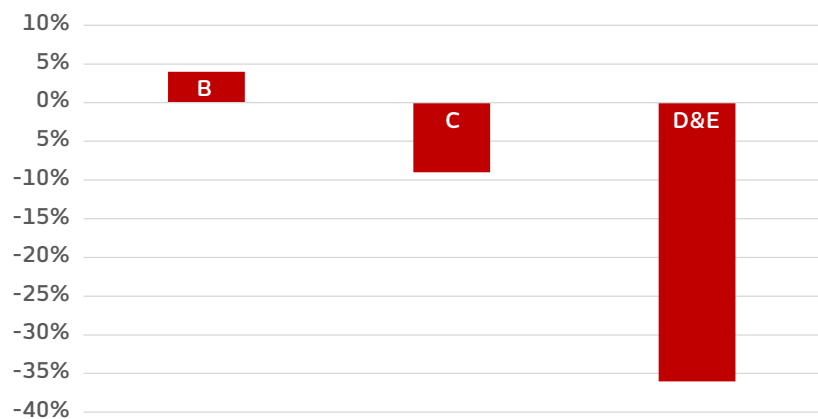


Figure 5: The change in score on the Global Acceptance Index from 2000 to 2020 for Central and Eastern European cities in each rating category. The index calculates a composite score of social attitudes toward the LGBTQ+ community that is comparable between countries and over time. It is compiled by the Williams Institute.

# USA and Canada

**City is fully open for business**

<b>AAA</b>	Boston	Toronto			
<b>AA</b>	Atlanta	Calgary	<b>Chicago</b>	Los Angeles	Minneapolis
	Montreal	<b>New York City</b>	Ottawa	<b>San Francisco</b>	<b>Vancouver</b>
	<b>Washington DC</b>				
<b>A</b>	<b>Dallas</b>	<b>Houston</b>			

\*Cities listed in green have improved their rating since 2020. Those in red have declined since 2020.

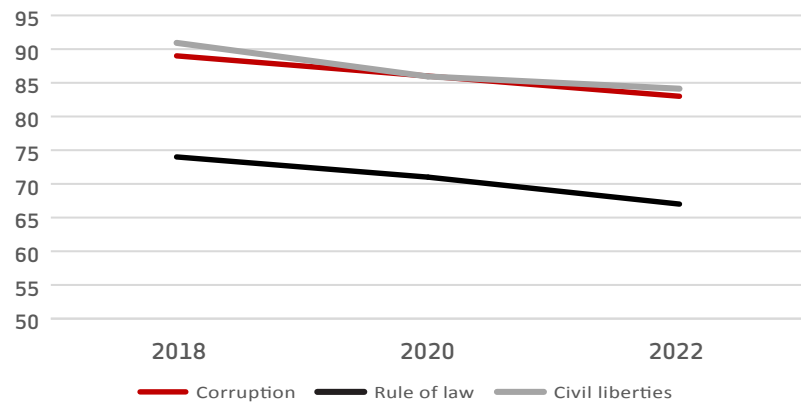


## Declining competitiveness in the US – a small blip or a long-term trend?

US cities have a strong track record of LGBTQ+ inclusion and economic competitiveness. All of the US cities included in the ratings have strong political support for LGBTQ+ rights and have thriving LGBTQ+ communities. Also, all cities, except for Dallas, Houston, and Atlanta, ban conversion therapy. They also have strong innovation networks, high levels of human capital, and strong economies. Because of this, every US city included in the ratings is considered *fully open for business*.

However, many cities fell in the ratings since 2020. This is a surprising result for a country that frequently shows up at the very top on competitiveness rankings. Unfortunately, it shows the limits of how open for business a city can be in a country that has seen worsening civil liberties, rule of law, and corruption, all of which are measured at the national level. In fact, this was the first year that the US fell out of the top 25 most transparent countries in the Corruption Perceptions Index. These measures are essential for the long-term protection of LGBTQ+ rights and sustainable economic competitiveness.

The organizations that compile these indices cited the 2020 Presidential election, attack on the US Capitol, police brutality against Black Americans, and state laws targeting reproductive rights and transgender individuals as key contributors to the United States' decline.<sup>xvi, xvii</sup> However, the US has been declining in these rankings for years, suggesting this is a longer-term trend that will require dedicated effort to reverse.

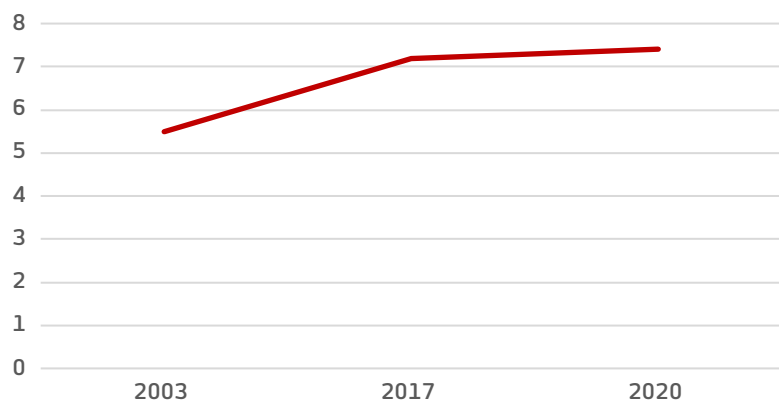


**Figure 6:** Scores for corruption (Corruption Perceptions Index), rule of law (World Bank Rule of Law rating), and civil liberties (Freedom House Freedom in the World rating) for the US over time. The rule of law score is normalized to a 0 to 100 scale to show comparability with the other scores.



Declining performance in these foundational indicators have begun to threaten increased levels of LGBTQ+ inclusion seen in the US over the past decade. State legislators are increasingly empowered to introduce laws that discriminate against LGBTQ+ individuals, especially transgender people. According to the HRC, 2021 was the “worst year for anti-LGBTQ legislation in recent history.”<sup>xlviii</sup> And as of May 2022, already 300 anti-LGBTQ+ bills had been introduced at the state level.<sup>xlix</sup>

While these bills are concentrated to a handful of states, they may have an effect on LGBTQ+ inclusion nationwide. For example, the Trevor Project found that anxiety and suicidal thoughts have been increasing in LGBTQ+ youth since 2020. In the organization’s 2022 survey, it found that 73% of LGBTQ+ youth have symptoms of anxiety, up from 68% in 2020. Additionally, 45% of LGBTQ+ youth have considered suicide, up from 40% in 2020.<sup>xlix</sup> These trends are also beginning to show up in overall social acceptance of LGBTQ+ people. While high relative to the world, public opinion may be approaching a ceiling. From 2000 to 2020,<sup>l</sup> social attitudes increased by 2% per year, but from 2014 to 2020 they increased by 0.5% per year. This is concerning because there are 22 countries that have more welcoming social attitudes than the US, suggesting that there is still room to improve.



**Figure 7: The Global Acceptance Index score for the US over time. The index calculates a composite score of social attitudes toward the LGBTQ+ community that is comparable between countries and over time. It is compiled by the Williams Institute.**

However, there are also a number of reasons why most cities in the US are positioned to return to AAA status in the coming years. First, they dominate innovation rankings. Five cities are in the top ten most innovative cities globally, according to the 2ThinkNow Innovation Index. These cities round this out with world-class universities that create a strong human capital stock. This is particularly true in Boston, which ranked second globally on innovation and has the highest number of elite universities per capita of any city in our ratings. Finally, while social attitudes toward LGBTQ+ people are slowing nationally, city-level data may show increasing support for LGBTQ+ inclusion at the local level.



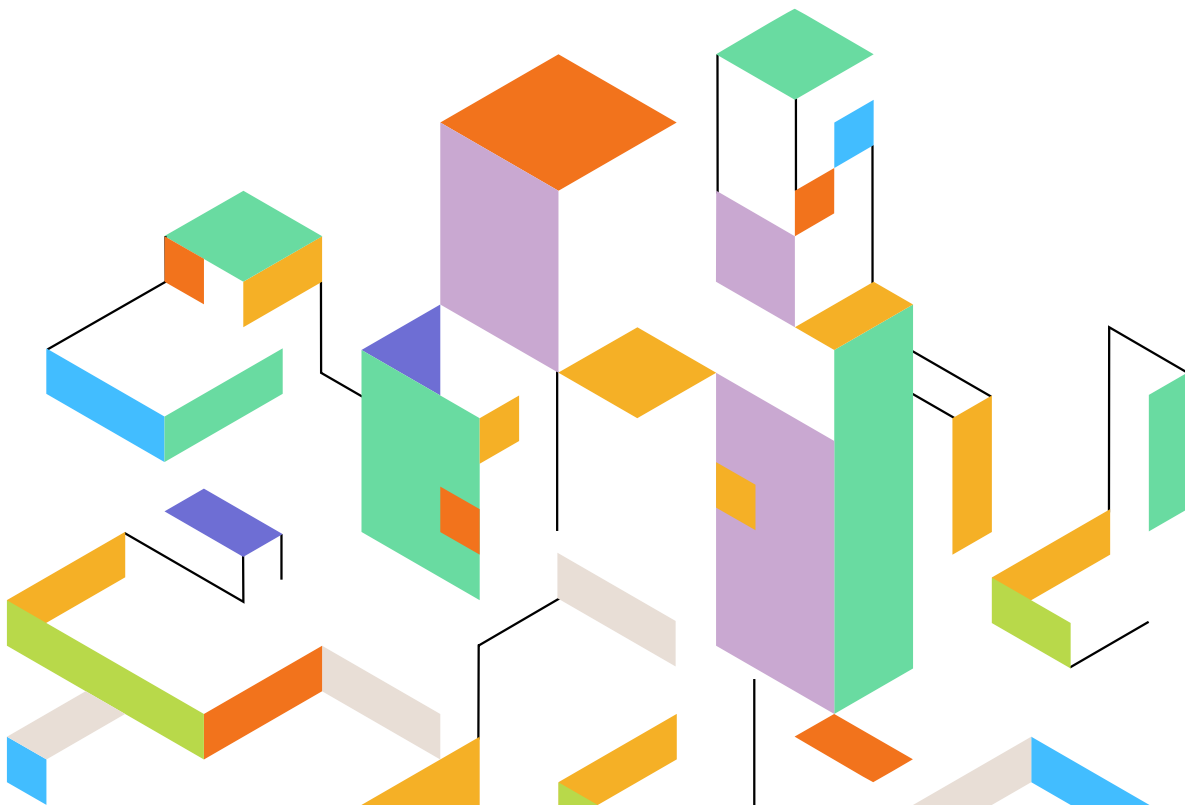
Texas has quickly become one of the most unfriendly states in the US toward transgender people, particularly transgender youth and their parents. However, cities in Texas, including Dallas (pictured above) and Houston (A ratings) have been pushing back.



### Cities in Texas are pushing back against anti-transgender discrimination

In Texas the environment for transgender people, particularly transgender youth and their parents, has quickly deteriorated. In the 2021 legislative session, over 30 anti-LGBTQ+ bills were introduced, according to Equality Texas.<sup>i</sup> While most of these bills did not become law, state officials have begun to use other means to implement anti-LGBTQ+ policies in the state. In February 2022, Texas’s governor, Greg Abbott, and attorney general, Ken Paxton, issued a directive and supporting legal opinion claiming that medical treatments for transgender youth are officially child abuse.<sup>ii</sup> Shortly after, the Texas Department of Family and Protective Services opened its first investigation into the family of a transgender teenager. This crackdown has led to early reports of brain drain from the state as families of transgender children flee to seek medical care in other states.<sup>iii</sup> It is also taking a toll on transgender peoples’ mental health. The Trevor Project, a suicide prevention hotline for LGBTQ+ youth, reported a 150% spike in youth accessing their services in Texas in 2021, corresponding to the introduction of many of these bills.<sup>iv</sup>

Cities in Texas, including Dallas and Houston which received “A” ratings, have been pushing back. In response to the directive to treat gender-affirming care as child abuse, the district attorneys representing Dallas, Houston, and San Antonio said they would not prosecute any of those cases.<sup>v</sup> Houston’s district attorney stated that parents “deserve to know they will not be dragged into court for consulting with medical professionals and doing what’s best for their kids.”<sup>vi</sup> Additionally, both Houston and Dallas have nondiscrimination ordinances that protect against discrimination based on sexual orientation and gender identity. However, cities can only do so much to fight against state laws, and many families with transgender children are still opting to leave Texas for friendlier states.



# Latin America and the Caribbean

## City is partially inclusive and competitive

<b>BB</b>	Montevideo	Santiago		
<b>B</b>	<b>Buenos Aires</b>	Sao Paulo	San Jose	
<b>CCC</b>	<b>Brasilia</b>	<b>Medellin</b>	Mexico City	Rio de Janeiro
<b>CC</b>	<b>Bogota</b>	<b>Guadalajara</b>		
<b>C</b>	Lima	<b>Monterrey</b>	<b>Panama City</b>	

## City is not inclusive or competitive

<b>DDD</b>	Kingston	La Paz	Port of Spain	<b>Quito</b>	Santo Domingo
<b>DD</b>	<b>Asuncion</b>	Guatemala City	<b>San Salvador</b>	<b>Tegucigalpa</b>	

\*Cities listed in green have improved their rating since 2020. Those in red have declined since 2020.

## LGBTQ+ inclusion saved some cities from falling in the ratings

Cities in Latin America and the Caribbean were hit hard by the COVID-19 pandemic, both economically and in terms of lives lost. As expected, this economic impact caused several cities to fall in the ratings as their economic competitiveness scores fell. However, a handful of cities stopped this decline by focusing on LGBTQ+ inclusion, a key ingredient for resilience (see pg 9).

Santiago, Mexico City, and San Jose have all faced economic troubles due to the pandemic. Given their reliance on tourism and exports, the home countries of all three cities saw their economies sharply contract in 2020. Although their economic competitiveness scores fell, none of these cities fell in the ratings, primarily due to actions taken to enforce LGBTQ+ inclusion. In Santiago, marriage equality was passed in late 2021 and same-sex couples were allowed to get married and jointly adopt children in March 2022.<sup>lvii</sup> Similarly, same-sex couples earned the right to marry in San Jose and Costa Rica in May 2020.<sup>lviii</sup> Previous Open For Business research has found that enacting the right to marry could help Costa Rica move up the value chain, boost its national reputation, and attract talent to the country, all aspects that will help it build economic resilience.<sup>lix</sup> Already having legalized marriage equality in 2009, Mexico City leaned into creating an inclusive city by being the first place in Mexico to ban conversion therapy.<sup>lx</sup>

While LGBTQ+ inclusion is not an economic panacea, it will help these cities signal that they are open for business and have the foundations to create thriving, prosperous economies in the long run.



### The economic impact of LGBTQ+ discrimination in the Caribbean

The three Caribbean cities included in the City Ratings are all considered not open for business. These ratings are not surprising given the low levels of LGBTQ+ inclusion in each city. While same-sex intimacy is legal in Santo Domingo and Port of Spain, none of the three cities allow same-sex couples to wed, provide protection against discrimination when accessing goods, services, or employment, or allow transgender individuals to change their legal gender. Social attitudes are also largely unaccepting of LGBTQ+ people in each city.

Unfortunately, this discrimination has economic consequences. Previous Open For Business research has found that LGBTQ+ exclusion costs up to 5.7% of GDP in the English-speaking Caribbean. This is driven by diminished human capital, health disparities, reduced labor productivity, experiences of violence, and restrictions on LGBTQ+ tourism. The research found that LGBTQ+ skilled workers in the Caribbean tend to migrate and stay in more open societies, causing brain drain. The research also found that 18% of potential visitors refused to visit the region due to anti-LGBTQ+ laws and attitudes.<sup>ix</sup>



Santiago, Mexico City (pictured above), and San Jose have all faced economic troubles due to the pandemic. Due to their reliance on tourism and exports, the home countries of all three cities saw their economies sharply contract in 2020. Although their economic competitiveness scores fell, none of these cities fell in the ratings, primarily due to actions taken to enforce LGBTQ+ inclusion.

# Western Europe

## City is fully open for business

<b>AAA</b>	Amsterdam London	Berlin <b>Oslo</b>	Copenhagen Stockholm	Dublin Zurich	Helsinki
<b>AA</b>	Basel <b>Luxembourg</b>	Bern Munich	Edinburgh Paris	Geneva Vienna	Glasgow
<b>A</b>	Barcelona Hamburg	Belfast Madrid	<b>Birmingham</b> Stuttgart	<b>Brussels</b>	Frankfurt

## City is partially open for business

<b>BBB</b>	Lisbon	<b>Lyon</b>
<b>BB</b>	Milan	Rome

\*Cities listed in green have improved their rating since 2020. Those in red have declined since 2020.



## Amsterdam is the world's most open for business city for the second time

Amsterdam is the highest scoring city in this year's City Ratings, further cementing the position that it first attained in 2020. This position shows Amsterdam's economic dynamism, global connectivity, social inclusion, and commitment to sustainability.

Economically, the city has top scores across each category in our ratings. But it performs exceptionally well in entrepreneurship, business environment, and innovation. It is no surprise then that Amsterdam's start-up scene is booming. According to dealroom.co, venture capital investment in the Netherlands, most of which is concentrated in Amsterdam, has grown by 3.1 times since 2020.<sup>lxii</sup> Additionally, Amsterdam may be becoming the new financial hub of Europe. It was the largest share-trading center on the continent in 2021.<sup>lxiii</sup> Its status as a financial hub is helped in part by its high quality of life, educated population, and the low barriers to starting a new firm. Another distinctive feature of Amsterdam's inclusive economy is its new commitment to the concept of "doughnut economics".<sup>lxiv</sup> After the COVID-19 pandemic hit, the city formally adopted the theory, which focuses on human development within the planet's ecological constraints.

Amsterdam is also a strong global beacon for LGBTQ+ inclusion. It has the most welcoming social attitudes toward the LGBTQ+ community of any city included in our ratings. Amsterdam's government also continues to take steps to commemorate LGBTQ+ history, most recently laying "stumbling stones" to remember LGBTQ+ victims of the Nazis.<sup>lxv</sup> LGBTQ+ people face very few legal barriers in Amsterdam, where LGBTQ+ discrimination in employment and in access to goods and services is illegal. However, the Netherlands has yet to ban conversion therapy, although a bill was introduced in Parliament last year.<sup>lxvi</sup>



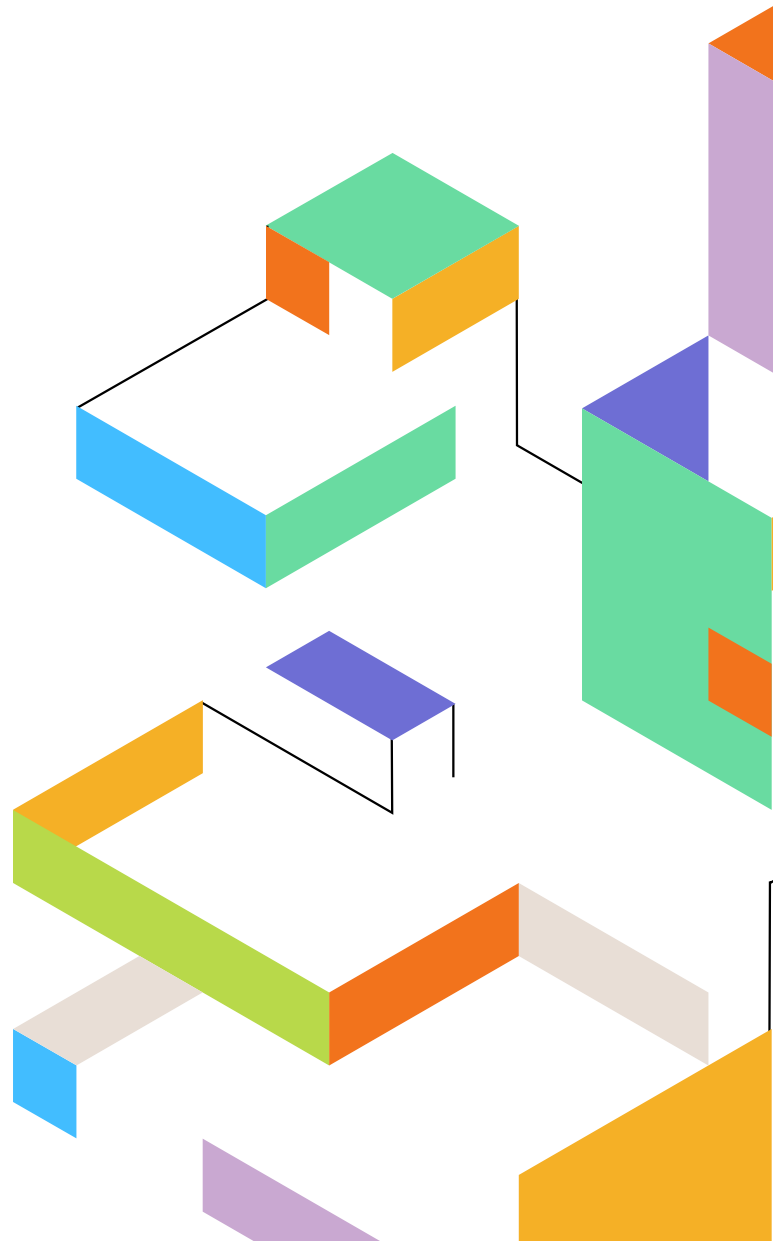
Amsterdam (AAA rating) is the highest scoring city in this year's City Ratings, further cementing this position that it first attained in 2020. The city performs exceptionally well in entrepreneurship, business environment, and innovation.



### Signs of trouble for inclusion in London

London is again a top-rated AAA city as it has been in every version of the City Ratings. This is due both to its strong economy and culture of inclusion. Economically, London has some of the highest levels of innovation and human capital out of the 145 cities included in the Ratings. It is also known as a stalwart supporter of LGBTQ+ inclusion and equality. For example, the Mayor of London, Sadiq Khan, is an outspoken supporter of LGBTQ+ rights and has a robust equality, diversity and inclusion strategy aimed at making London a welcoming city for everyone. This support exists in part due to the advocacy of a thriving civil society and strong support for LGBTQ+ rights across the United Kingdom.

However, London's reputation as a beacon of inclusion, especially regarding transgender people and their rights is being challenged at the national level. For example, in April 2022, the UK government announced that it would not include transgender people in its long-awaited ban on conversion therapy.<sup>lxvii</sup> This led to an outcry from civil society organizations that led the government to cancel its international LGBTQ+ conference, Safe to Be Me.<sup>lxviii</sup> Because LGBTQ+ inclusion is closely related to innovation, human capital, and quality of life, these actions could have negative repercussions for London's AAA rating in the future.



# Appendix

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# Taking Action

The City Ratings provide businesses with a holistic view into which cities are open for business, both inclusive and competitive. They can help business leaders craft a more effective strategy for advancing LGBTQ+ inclusion, both within their workforce and in the societies in which they operate. More specifically, the City Ratings can help business leaders take action on LGBTQ+ inclusion across three areas:

## **Business leaders can use the City Ratings to help inform where they open new or expand existing operations.**

Businesses consider a number of factors when deciding where to open new or expand existing operations. Most factors focus on a location's geographic and economic characteristics, such as its access to major markets, infrastructure, tax rate, and regulatory environment. An increasingly important, and often overlooked, set of factors is LGBTQ+ inclusion and the foundational governance practices that support it.

The City Ratings provide two main benefits to businesses considering these factors. First, they can help businesses understand where they can most likely see the full benefits of an inclusive workplace. As previous Open For Business reports have established, there are strong business benefits that companies can derive from being LGBTQ+ inclusive. And companies that operate in more LGBTQ+ inclusive locations are more likely to take actions to create inclusive workplaces. For example, in Open For Business's New Global Champions report, we found that 60% of high-growth emerging market companies headquartered in cities with high City Ratings openly supported LGBTQ+ inclusion. The same was true for only 30% of companies headquartered in cities with low ratings.

Another benefit of the City Ratings is that they can help businesses understand their exposure to locations or governments that could lead to reputational and regulatory risks, which other ratings can miss. A low rating can signify that a city lacks a strong rule of law, has high corruption, or cracks down on civil liberties. Additionally, actions against the LGBTQ+ community tend to be "canaries in the coal mine" that mark the beginning of a more illiberal or authoritarian government.

Understanding how these locations and their governments can expose a company to regulatory and reputational risks, which other ratings might not adequately capture, is important. For example, when Russia invaded Ukraine in 2022, foreign companies that had significant investments in Russia suddenly found themselves under immense regulatory and public pressure to divest. Many of these companies were taken by surprise, not because Russia's corruption and human rights abuses were unknown, but because many prominent ESG ratings, which companies rely on to gauge these risks, did not adequately capture these risks. For example, one study found that companies with substantial investment in Russia had higher ESG scores on average than those that were not invested in Russia.<sup>lxix</sup>

Given their focus on LGBTQ+ inclusion and supporting governance indicators, the City Ratings can be a useful tool for businesses assessing their exposure to similar situations. Moscow and St. Petersburg both received a DD rating, a clear indication that both cities are and have been closed for business.



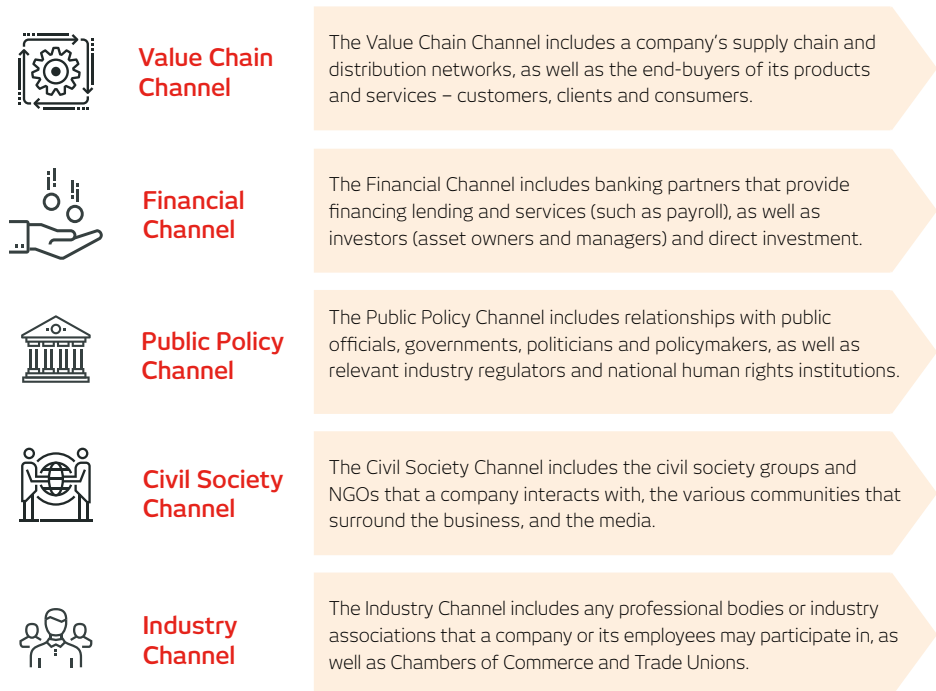
**Business leaders can use the City Ratings to more effectively support LGBTQ+ workers.**

The City Ratings can help business leaders more effectively support workers in locations they already operate in. There are three categories of workers for whom business leaders can use the City Ratings to consider the best way to create an inclusive environment:

<p><b>1. LGBTQ+ workers based in their home offices:</b> The City Ratings can help business leaders allocate resources to create an inclusive environment for LGBTQ+ workers in their home offices. For instance, cities with low ratings may require more time and attention from diversity, equity, and inclusion professionals to create a safe environment due to a lack of an LGBTQ+ inclusive environment outside of the office.</p>	<p><b>2. LGBTQ+ workers traveling on international assignments:</b> The City Ratings can help business leaders understand how to best support LGBTQ+ workers who are on international assignments. For example, if an LGBTQ+ worker is relocating or traveling to a city with a rating considered closed for business, the business can provide them with important legal and cultural information to help them navigate the new environment. Open For Business's report Working Globally provides a framework for how companies can support these workers.</p>	<p><b>3. LGBTQ+ workers in the company's supply chains:</b> The City Ratings can also help business leaders understand where LGBTQ+ workers in their supply chains may be more likely to face discrimination at work. For example, if an apparel company works with large factories in a city that is not open for business, such as Addis Ababa or Dhaka, it could ensure LGBTQ+ policies are included in its factory audits or work with factory leadership to implement LGBTQ+ inclusive policies.</p>
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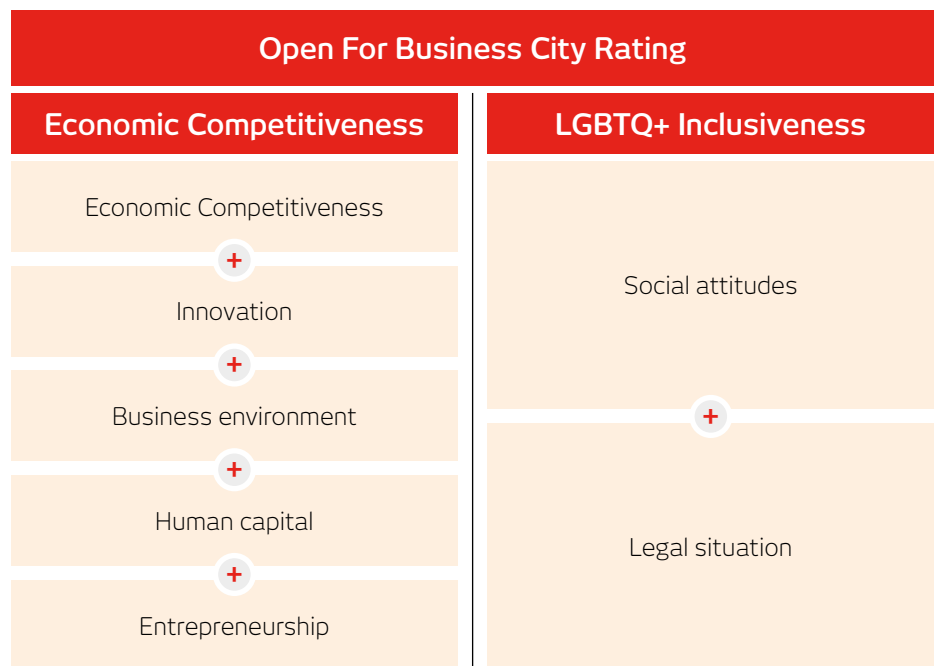
**Business leaders can use the City Ratings to inform their advocacy for LGBTQ+ rights in the public sphere.**

Finally, the City Ratings can help business leaders effectively advocate for LGBTQ+ rights in the public sphere. There are several channels and stakeholders that business leaders can engage on LGBTQ+ rights, summarized in the graphic below from Open For Business' Channel of Influence Report. Some strategies are more effective and appropriate in cities which are open for business, including featuring positive images of LGBTQ+ people in public advertisements, publicly advocating for inclusion with policymakers, and working with chambers of commerce and trade unions on LGBTQ+ inclusion. Other strategies are more effective in cities that are not open for business, including working with suppliers, privately engaging policymakers, providing safe space for civil society organizations, and incorporating LGBTQ+ inclusion in investment decisions.



# How are cities rated?

The Open For Business City Ratings are determined by a combination of 27 metrics from a number of well-respected sources. Each city receives a final score, which corresponds to a rating (AAA through E). In this report, we only include a city's rating rather than its score in an effort to focus on which cities are broadly doing well and which have room for improvement. The final score is comprised of two categories: Economic Competitiveness and LGBTQ+ Inclusiveness. Both categories are comprised of a variety of sub-categories, which are in turn comprised of individual data points, listed below. Please see the following pages for a full explanation of data sources, weights and methodology.



**Figure 7: The Open For Business City Ratings are comprised of two categories, Economic Competitiveness and LGBTQ+ Inclusiveness. These categories are in turn comprised of various sub-categories.**

# City Rating Methodology

Open, inclusive, diverse cities are more competitive: they encourage innovation, they attract high-skilled workers, and they are better at growing high-value businesses. LGBTQ+ inclusion sends a clear signal that a city is an open, progressive and dynamic place to do business.

This report presents a broad base of data that supports these assertions. It covers a wide range of questions about cities: how easy is to do business? How “network ready” is the city? Is it corruption-free? Is there a healthy “innovation ecosystem”? What is the quality of living like? Are LGBTQ+ people welcome, and what is their legal status?

We have synthesized this data into the Open For Business City Ratings. It combines 27 individual indicators from a number of well-respected data sources to produce a picture of which cities are open, progressive and competitive – and which are not. It is intended as a useful tool for the following groups of people:

For policymakers seeking to boost the economic performance of their city, the index can help them to benchmark their performance against competing cities.

For businesses considering possible new locations for offices or operations, the index can help evaluate differences between cities.

For high-skilled individuals thinking about relocating to another city, the index can help them to think about what they are looking for and how they might fit in.

## Methodology in Detail

### 1. Select Data Sources

The first step was to determine which data sources to use for the ratings. The purpose of the ratings is to combine economic factors with elements that measure inclusion of the LGBTQ+ community in a city. The 2020 City Ratings were used as the starting point to preserve as much consistency as possible, to enable comparisons over time. A handful of data sources used in the 2020 City Ratings were not updated due to various reasons. In this case, we identified an acceptable substitute that would create as much comparability as possible.

The ratings model is split into two main categories: Economic Competitiveness and LGBTQ+ Inclusiveness.

Within Economic Competitiveness, five sub-categories exist:

- a. **Economic performance:** This is comprised of four indicators that approximate a city’s wealth, its home nation’s wealth and competitiveness.
- b. **Innovation:** This is comprised of two indicators that approximate a city’s and its home nation’s potential for innovation.
- c. **Business environment:** This is comprised of five indicators that approximate how supportive a city is for businesses to flourish.
- d. **Human capital:** This is comprised of four indicators that approximate a city’s level of education and proclivity to attract skilled individuals.
- e. **Entrepreneurship:** This is comprised of three indicators that approximate a city’s level of entrepreneurial activity and how supportive its home nation is of new businesses.

Within LGBTQ+ Inclusiveness, two sub-categories exist:

- a. **Social attitudes:** This is comprised of four indicators that approximate a city’s and its home nation’s attitudes toward LGBTQ+ people. The Williams Institute’s Global Acceptance Index is used as a national indicator of attitudes and their trend over time.
- b. **Legal situation:** This is comprised of five indicators that approximate the legal situation for LGBTQ+ people and the indicators that create a strong foundation for LGBTQ+ inclusion, such as lack of corruption, strong civil liberties, and press freedom.

All sources used are reputable and cover a global set of cities. This ensures credible scoring and a globally representative set of cities.

## 2. Finalize cities to include

Once data was collected, the team created the list of cities that would be included in the ratings. Cities were chosen based on which were included in all selected datasets. To avoid skewing the index in favor of any one geography, we only include a maximum of 5 cities per country. The exception is the United States, which includes 10 cities. This is due to the size of the US economy and population. The final list includes 145 cities.

## 3. Standardize data sources

The next step is to standardize the data to a scale of 1 to 10 to create a comprehensive output to compare each city. The following equation normalizes each individual indicator in which it was better to have a high score:

$$\text{Observed Outcome Rescaled} = \left( \frac{\text{Observed outcome} - \text{lowest outcome}}{\text{Highest outcome} - \text{lowest outcome}} \right) \times 10$$

And for each individual indicator in which it was better to have a low score, the following equation is used:

$$\text{Observed Outcome Rescaled} = \left\{ 1 - \left( \frac{\text{Observed Outcome Rescaled}}{\text{Highest outcome} - \text{lowest outcome}} \right) \right\} \times 10$$

This normalization methodology was adopted from Opportunity Nation's 2016 Opportunity Index.<sup>3</sup>

Once the data was normalized to a 10-point scale, the arithmetic mean of the scores across all included cities was calculated. If the mean was below 3.0, the "Highest Outcome" variable above was substituted with the 90th percentile value. All cities with values higher than the 90th percentile received a "10" for that metric. If the mean was above 7.0, the "Lowest Outcome" variable above was substituted with the 10th percentile value. All cities with values lower than the 10th percentile received a "0" for that metric. This was to ensure sufficient variation in values to differentiate cities on each individual indicator.

## 4. Weight the individual indicators

Each of the two categories are equally weighted as 50% of the overall score. Each individual indicator weight is available in the table on the following page.

## 5. Rate the cities

Once each city had a composite 10-point score (10 being the highest, 0 the lowest), it was awarded a rating, similar to a credit rating. The purpose of rating cities instead of ranking them is to not dictate a definitive ranking on each city. We understand that there is no one-size-fits-all approach to city competitiveness. Additionally, we want the ratings to start a conversation on the various components that make a city a good place to do inclusive business – something that will be easier to do without focusing on the minutiae of weightings and scores.

<sup>3</sup>Opportunity Nation (2016), Opportunity Index 2016, available at: <http://opportunityindex.org/wp-content/uploads/2016/12/Methodology-Report-2016-FINAL-12.13.pdf>

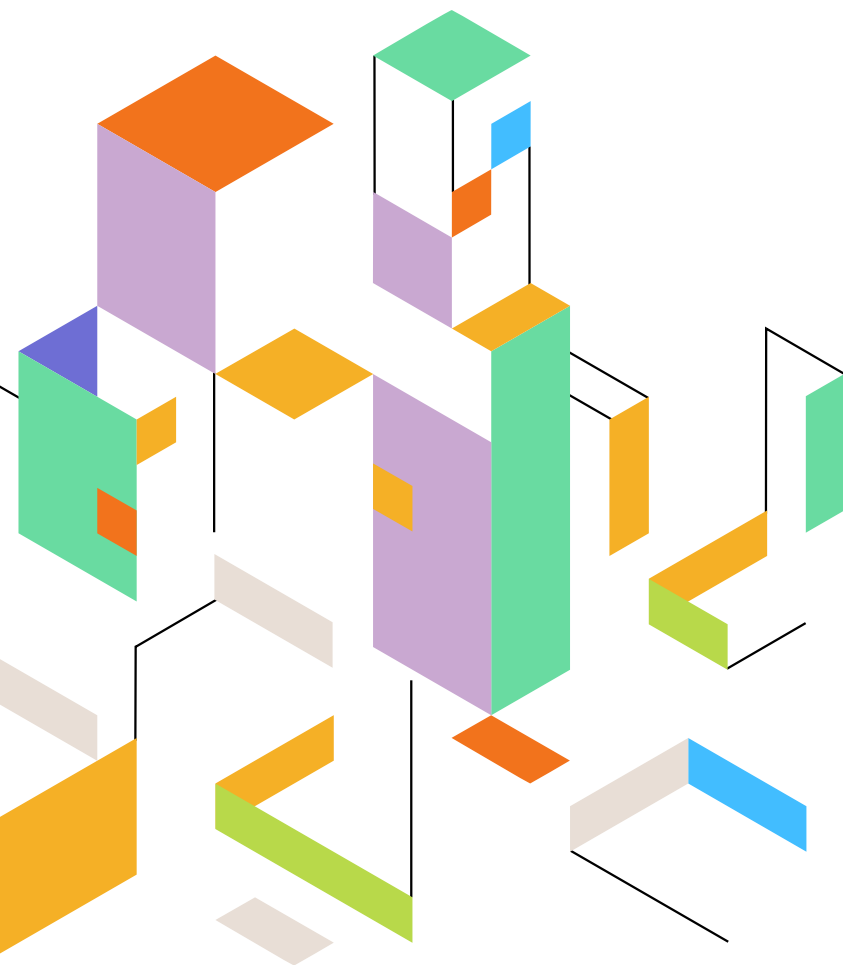
# Individual Indicators and Weightings

## Economic Competitiveness

	Metric	Level of Data	Source	Year	Description	Weight
<b>Economic Performance</b>	City GDP Per Capita	City	Statista Global Business Cities Report	2021	Data comes from Statista, a company specializing in market and consumer data. Statista compiled GDP per capita data from various sources for its Global Business Cities Report, released in January 2022. More information can be found here: <a href="https://www.statista.com/study/62120/statista-global-business-cities/">https://www.statista.com/study/62120/statista-global-business-cities/</a>	5.0%
			McKinsey Global Institute	2015	For cities which were not included in the Statista Global Business Cities Report, GDP per capita data was drawn from the McKinsey Urban World app, an extrapolation of the data presented in McKinsey Urban World. To report current data, we grew the 2015 GDP per capita values reported by McKinsey by their projected growth rate for each city until we arrived at 2022 values. Cities for which this data source was used include: Abu Dhabi, Addis Ababa, Adelaide, Amman, Asuncion, Baku, Basel, Belfast, Bern, Bratislava, Brisbane, Colombo, Dakar, Dar es Salaam, Durban, Edinburgh, Kingston, Ljubljana, Luxembourg, Medellin, Ottawa, Rabat, Riga, San Salvador, Sarajevo, Skopje, Tallinn, Tbilisi, Tegucigalpa, Tehran, Tirana, Tunis, Wellington, Wroclaw, Zagreb, and Port of Spain.	5.0%
	Urban Population Growth	National	World Bank	2020	World Bank staff estimates of the growth in population living in cities based on the United Nations Population Division's World Urbanization Prospects.	5.0%
	Economic Resilience	National	FM Global Resilience Index	2021	The 2021 FM Global Resilience Index is the only tool that compiles economic, supply chain and risk quality data on nearly 130 countries to evaluate resilience around the world.	5.0%
	National GDP growth	National	World Bank	2018 to 2020	The 2020 annual GDP growth rate, based on data from the World Bank's database.	5.0%
<b>Innovation</b>	City innovation potential	City	2thinknow	2021	This metric is a measure of a city's potential for innovation, as determined by 2thinknow's Innovation Cities Index. There are 500 cities analyzed and ranked. The index uses 162 quantitative and qualitative indicators.	10.0%
	National innovation potential	National	World Intellectual Property Organization	2021	The Global Innovation Index combines 81 indicators exploring a broad vision of innovation, including political environment, education, infrastructure and business sophistication. It measures the innovation potential of 81 indicators.	10.0%

<b>Business Environment</b>	Presence of a stock exchange	City	Various	2022	This denotes the presence of a stock exchange in each city, which is a signal of mature or maturing capital markets. If a city is in a country with strong capital markets but does not have its own stock exchange, it receives half credit.	1.0%
	FDI inflows per capita	National	Economist Intelligence Unit	2021	This metric measures how much foreign direct investment flowed into a country in 2021. It is a measure of how attractive the country is to foreign investment and capital. The value is divided by the national population to normalize the values.	4.75%
	Networked readiness	National	Portulans Institute	2021	The Networked Readiness Index is a composite index constructed with three levels. The primary level consists of four pillars that make up the fundamental dimensions of network readiness. Each of the fundamental pillars divides into additional sub-pillars that constitute the second level. The third level consists of individual indicators distributed across the different sub-pillars and pillars of the primary and secondary levels. All indicators used within the NRI belong to a pillar and a sub-pillar.	4.75%
	Trade to GDP ratio	National	World Bank	2020	The total amount of inbound and outbound trade a country does, compared to its GDP in 2020. Serves as a measure of how connected a country is to the global economy.	4.75%
	Strength of auditing and reporting standards	National	World Economic Forum	2020	Response to the survey question "In your country, how strong are financial auditing and reporting standards?" This is meant to measure the robustness of internal standards, which improve ease of doing business.	4.75%
<b>Human Capital</b>	Quality of living	City	Mercer	2019	The Mercer Quality of Living Survey evaluates quality of living based on data from 231 cities on 39 factors including political, economic, environmental, personal safety, health, education, transportation and other public services.	5.0%
	Net inflow of university students	National	UNESCO	2016	The total net inflow of students attending university in a certain country. This measures the openness of a country to foreigners and the quality of a country's higher education institutions.	5.0%
	Years of schooling	National	Pulled from WEF Competitiveness Index; UNESCO; Wittgenstein Centre for Demography and Global Human Capital	2019	Average number of completed years of education of a country's population aged 25 years and older, excluding years spent repeating individual grades.	5.0%
	Number of top 500 universities per capita	National	Times Higher Education	2022	The number of universities ranked in the top 500 universities in the world by Times Higher Education, divided by a country's population which comes from the World Bank.	5.0%

<b>Entrepreneurship</b>	Ease of starting a business	National	World Bank	2020	Countries are ranked on their ease of starting a business, from 1–190. A high ease of starting a business ranking means the regulatory environment is more conducive to starting a local firm.	6.7%
	Global entrepreneurship index	National	World Economic Forum	2020	Response to the survey question “In your country, to what extent do people have an appetite for entrepreneurial risk?” This is meant to measure the popular attitudes toward entrepreneurship.	6.7%
	Number of companies headquartered	City	Crunchbase	2022	Crunchbase is a knowledge platform for investors, companies, researchers, and journalists. It compiles a database of companies that are based in each city around the world, drawn from input from 3400 global investment firms and a large community of executives, entrepreneurs, and investors.	6.7%



## LGBTQ+ Inclusion

<b>Social Attitudes</b>	Global Acceptance Index (GAI)	National	Williams Institute	2020	A combined metric blending a range of surveys taken from 1980 to 2020 to produce a standardized score for a society's attitudes toward LGBTQ+ people.	12.5%
	Change in GAI	National	Williams Institute	2000 to 2020	The percent change in the GAI from 2000 to 2020.	12.5%
	Openness to LGBTQ+ visitors	City	Lonely Planet/ Open For Business analysis	Various	Lonely Planet Travel Guides publish a description of how welcoming a city is to LGBTQ+ tourists. This provides a proxy to determine how open a city is for LGBTQ+ people. For further methodology, please see the main body of the report.	12.5%
	Political supportiveness	City	Municipality websites, media outlets	Various (data pulled March 2022)	A measure of how supportive the city government is of the LGBTQ+ community. The score looks at if LGBTQ+ resources are available on a city's website, if there is an LGBTQ+ advisory committee, if a city official has made a positive statement in public, and if the city has a pride parade that takes place without government restriction.	12.5%
<b>Legal Situation</b>	LGBTQ+ legal status	City	Equaldex, ILGA, municipality websites	2020	The legal rights that LGBTQ+ people have in a city. This measure incorporates the following aspects of the law: • Same-sex acts • Same-sex marriage • Right to change legal gender • Same-sex adoption • LGBTQ+ discrimination protections in goods and services • LGBTQ+ discrimination protections in employment • Conversion therapy	10.0%
	Rule of law	National	World Bank	2021	According to the World Bank, "Rule of Law captures perceptions of the extent to which agents have confidence in and abide by the rules of society, and in particular the quality of contract enforcement, property rights, the police, and the courts, as well as the likelihood of crime and violence. Estimate gives the country's score on the aggregate indicator, in units of a standard normal distribution, i.e. ranging from approximately -2.5 to 2.5."	10.0%
	Corruption perception	National	Transparency International	2021	The Corruption Perceptions Index "scores and ranks countries/territories based on how corrupt a country's public sector is perceived to be. It is a composite index, a combination of surveys and assessments of corruption, collected by a variety of reputable institutions."	10.0%
	Civil liberty	National	Freedom House	2021	The Freedom in the World report scores each country on a scale from 0 to 4 for each of 10 political rights indicators and 15 civil liberties indicators. This provides an overall view of the strength of a country's political rights and civil liberties.	10.0%
	Press freedom	National	Reporters without Borders (RSF)	2021	The World Press Freedom Index is determined by analyzing responses of experts to a questionnaire devised by RSF. This is combined with reports of abuse against the press to create a holistic score.	10.0%



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