

# Africa and the Middle East

## City is partially inclusive and competitive

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

## City is not inclusive or competitive

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

Note: Cities in red received a lower rating than in 2018. Cities in green received a higher rating.

### South African cities remain strong, but have become less *inclusive and competitive*

Cape Town, Johannesburg and Durban follow Tel Aviv as the top performers in the region. This is not surprising, as South Africa's constitution was the first in the world to outlaw discrimination on the grounds of sexual orientation and has introduced many laws to protect LGBT+ people. However, violence and discrimination against LGBT+ people persist at worryingly high levels. A survey of lesbian women in South Africa found that 31% experienced sexual violence<sup>11</sup>, which costs the economy between \$10.5 million and \$64.8 million per year.<sup>12</sup> In addition, data points toward worsening economic conditions. For example, all three South African cities included in the index, Cape Town, Durban and Johannesburg, saw decreases in their Business Environment and Economic Performance scores.

### Tel Aviv is the clear leader, but questions about "pinkwashing" persist

The region is led by cities in countries that have strong LGBT+ rights protections. The clear leader is Tel Aviv. Its world-class start-up scene is supported by its reputation as a beacon of openness for LGBT+ people in the region. This is further supported by the growing momentum for banning conversion therapy in Israel. In 2019, the Israel Medical Association, which represents 90% of doctors, banned its members from conducting conversion therapy on patients.<sup>13</sup> However, many LGBT+ activists contend that progressive policies toward LGBT+ 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".

### Istanbul's rating improved – and could signal a regional bright spot

Istanbul moved from a DDD to a C rating, pulling the city into the partially *inclusive and competitive* category. On the economic side, the city's potential for innovation has increased, as has Turkey's ease of doing business score. Turkey is far from being an LGBT+ friendly country, and many are concerned about the current government's respect for human rights. However, the new mayor of Istanbul publicly supported the 2019 Pride Parade, which was broken up by state police forces<sup>14</sup>. As is the case with many cities in this report, words need to be supported by actions to advance LGBT+ inclusion before Istanbul can truly become inclusive and competitive.

### Dakar became less *inclusive and competitive*, driven by social attitudes

In contrast to Istanbul, Dakar has fallen in the ratings and become less *inclusive and competitive*, mainly driven by worsening social attitudes toward LGBT+ people. Weak Innovation, Human Capital and Business Environment scores are paired with the lowest social acceptance score out of all cities included and the most rapidly decreasing social attitudes toward LGBT+ people. Senegal's score on the Williams Institute's Global Acceptance Index decreased by 55%, falling from 3.8 (out of 5) in 2000 to 1.7 in 2017.<sup>15</sup>

# Asia Pacific

## City is inclusive and competitive

<b>AAA</b>	<b>Sydney</b>				
<b>AA</b>	<b>Auckland</b>	Melbourne			
<b>A</b>	<b>Brisbane</b>	<b>Hong Kong</b>	<b>Perth</b>	Taipei	Wellington

## City is partially inclusive and competitive

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

## City is not inclusive or competitive

<b>DDD</b>	Guangzhou	Hanoi			
<b>DD</b>	<b>Nur-Sultan</b>	Chongqing	<b>Colombo</b>	<b>Jakarta</b>	Phnom Penh
<b>D</b>	Dhaka	Yangon			

Note: Cities in red received a lower rating than in 2018. Cities in green received a higher rating.

### Hong Kong and Taipei break into the upper echelon

Against a backdrop of political turbulence, Hong Kong has seen key wins for LGBT+ inclusion, with courts ruling that same-sex couples married abroad should be recognized in Hong Kong and the government amending its rules to allow same-sex couples to file joint tax returns.<sup>16</sup> This progress has set the stage for the Hong Kong Marriage Equality coalition to launch and begin a campaign focused on the right to marry. However, ongoing protests in the city cast doubt on if the strong economic environment and LGBT+ inclusion gains can persist in the future.

Nearby, Taiwan, China became the first region in Asia Pacific to allow the freedom to marry in 2019. Companies, both multinational and local, have supported and applauded equal marriage and other LGBT+ rights issues in the region. Coupled with a strong environment for business and innovation, this propelled Taipei to one of the most inclusive and competitive cities in Asia.

### Singapore remains partially inclusive and competitive

Despite high ratings on competitiveness measures such as the World Economic Forum Global Competitiveness Index, Singapore is in the partially *inclusive and competitive* category, clearly behind its main regional competitor, Hong Kong. While Singapore continues to have strong economic performance, the city state's lack of civil liberties and legal protections for LGBT+ people, highlighted by its continued criminalisation of same-sex acts, are worrying signs for sustained growth. Unfortunately, these discriminatory laws show no signs of disappearing any time soon. In March 2020, three cases that were challenging Section 377A of the Penal Code, which criminalises same-sex acts, were dismissed by the High Court.<sup>17</sup> Although some government officials suggest Singapore is welcoming to people regardless of sexual orientation<sup>18</sup>, there is little evidence these statements mirror reality. In addition to the continued criminalisation of same-sex acts, there have been many other cases of discrimination against LGBT+ people, such as transgender people losing their access to public housing.

### Kuala Lumpur – enduring changes or a false dawn?

Malaysia has gained international criticism for its poor treatment of LGBT+ people – from the public caning of lesbians to the arrest of five men for suspicion of homosexuality.<sup>19</sup> Given this backdrop, Kuala Lumpur's improvement in the ratings comes as a surprise. The city's increase from CC to CCC was driven by improvements on corruption, press freedom, rule of law and civil liberties, all of which were part of the new government's platform, and which often precede improvements in conditions for LGBT+ people. However, many in the LGBT+ community are increasingly worried that the government is backing away from its liberal reform agenda and that recent changes will not translate into improvements for LGBT+ inclusion.<sup>20</sup> Time will tell if Kuala Lumpur continues to become more *inclusive and competitive*, or whether recent progress is a false dawn.

# Central and Eastern Europe

## City is partially inclusive and competitive

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

## City is not inclusive or competitive

<b>DDD</b>	Kiev	Moscow	Skopje	<b>Tirana</b>
<b>DD</b>	Minsk	Sarajevo	St Petersburg	
<b>D</b>	Baku			

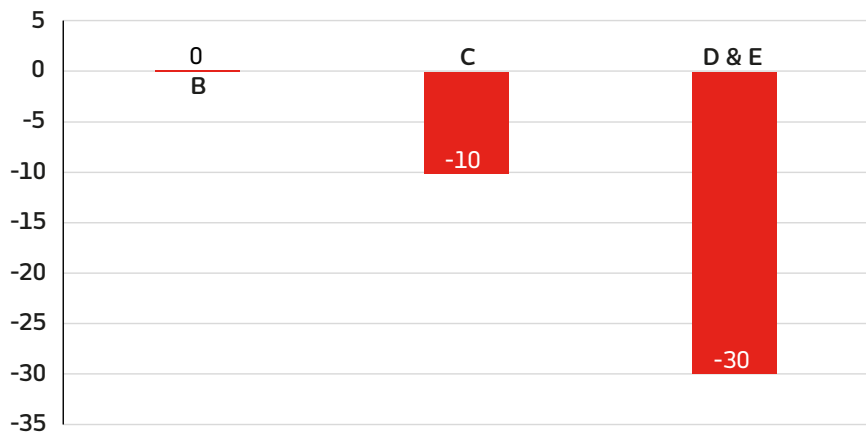
Note: Cities in red received a lower rating than in 2018. Cities in green received a higher rating.

### Warsaw is a beacon of LGBT+ inclusion in Poland

Recently, Poland has become synonymous with LGBT+ discrimination. Its “LGBT+ free zones”, which make up a third of the country, have received scrutiny and condemnation from human rights organizations around the world.<sup>21</sup> Against this dark and worsening backdrop, Warsaw stands as a relative beacon of liberalism and LGBT+ inclusion. This is reflected by its BB rating, one of the highest in the region. Through clear actions such as joining the Pride parade for the first time<sup>22</sup> to signing an LGBT+ Declaration<sup>23</sup>, Warsaw’s mayor, Rafal Trzaskowski, has clearly shown that Warsaw is open and inclusive of LGBT+ people. On the economic competitiveness side, the city is buoyed by strong economic performance and a reasonably supportive business environment, strengthened by strong marks for innovation. In a country that is becoming a symbol for LGBT+ discrimination in Europe, Warsaw shows that openness and inclusion are essential for a city’s long-term growth prospects.

### Polarisation is intensifying

Trends in the underlying data on social acceptance show that in Eastern Europe the best are getting better whilst the worst are getting worse. This potentially has implications for the long-term competitiveness of cities in the region. Evidence shows that LGBT+ inclusive cities are more innovative, better able to attract skilled workers and have a higher quality of life. The chart below shows the stark difference between cities in the region based on its rating. The cities which are the least inclusive and competitive are getting less and less LGBT+ friendly.



**Chart 6: The change in popular attitudes toward LGBT+ people over time, across cities of different ratings. Cities with B ratings have seen social attitudes hold steady over the past 30 years, whereas those that are rated D and E have an average decrease of 30%. Based on the Williams Institute Global Acceptance Index.**

# USA and Canada

## City is inclusive and competitive

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

Note: Cities in red received a lower rating than in 2018. Cities in green received a higher rating.

## Cities leading the way

American and Canadian cities have the highest collective ratings of any region, with every city included reaching the fully inclusive and competitive status. Many of these cities have maintained or improved upon this high rating despite national trends, especially in the USA, that are moving toward isolationism and increasing discrimination against LGBT+ people, especially against trans people. Cities have stood in stark contrast to rising LGBT+ discrimination, by enacting local laws that protect LGBT+ people, continuing to have vocally inclusive politicians and creating an economic environment where innovation thrives, and skilled and talented individuals want to work.

## Conversion therapy bans as differentiators

While all of the cities included in this region score highly, those that outperform the rest tend to have one thing in common: bans on conversion therapy. A wave of bans over the past two years has elevated Boston (whose home state, Massachusetts, banned the practice in March 2019<sup>24</sup>) and Vancouver (whose city council did the same in mid-2018<sup>25</sup>) to the AAA status. In Atlanta, a ceremonial ban in the form of a city council admonition helped move it to the AA category.<sup>26</sup> Minneapolis strengthened its AA rating by enacting its own ban, even though state-wide legislation failed in 2019.<sup>27</sup> In a region where many cities are seen to be LGBT+ inclusive, continuing to create an inclusive environment that actively supports LGBT+ people can set certain cities apart.

# Latin America and the Caribbean

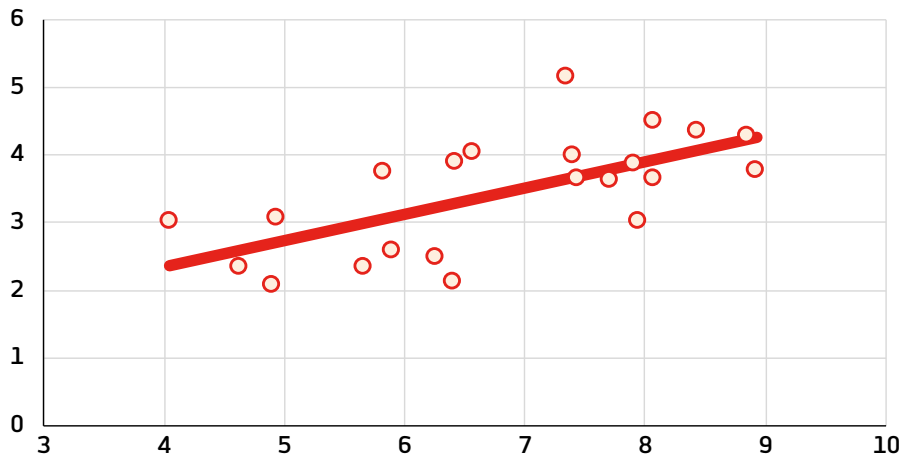
City is partially inclusive and competitive					
<b>BB</b>	Buenos Aires	Montevideo	Santiago		
<b>B</b>	Medellín	San Jose	<b>São Paulo</b>		
<b>CCC</b>	Bogotá	<b>Guadalajara</b>	<b>Mexico City</b>	<b>Rio de Janeiro</b>	
<b>CC</b>	Brasília	Monterrey	Panama City		
<b>C</b>	<b>Lima</b>	<b>Quito</b>			
City is not inclusive or competitive					
<b>DDD</b>	Asunción	Kingston	La Paz	San Salvador	<b>Santo Domingo</b>
<b>DD</b>	Guatemala City				
<b>D</b>	Tegucigalpa				

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**Inclusive cities are the highest performers, but many challenges exist**

As a region, Latin America and the Caribbean does not have a strong performance in the City Ratings. The highest rated cities in the region are considered partially *inclusive and competitive*. At the same time, South America is one of the most LGBT+ inclusive regions in the world, at least from a legal sense. Many countries have marriage equality, protect LGBT+ people from hate crimes and have protected the rights of trans people. At first glance, it may seem like the region’s economies run counter to the evidence which shows that more inclusive cities are more economically competitive.

However, the data do not support this. Upon further inspection, this region shows the strength of the relationship between LGBT+ inclusion and competitiveness more than others. The correlation between a city’s social attitudes score and its economic competitiveness score is very high – 0.65. This suggests that LGBT+ inclusion is closely related to economic competitiveness in the region.



**Chart 7: An increase in a city’s social attitude score toward LGBT+ people (x axis) is correlated to an increase in a city’s economic competitiveness (y axis). Chart includes cities in Latin America & the Caribbean that are included in the City Ratings.**

So why do cities in this region seem to underperform? First, it is no secret that some countries in the region have been riled by corruption and populist policies that have led to, among other things, massive bailouts from the IMF.<sup>28</sup> These national policies have hurt the competitiveness of cities. Second, while the region is legally inclusive of LGBT+ people, there is still much discrimination and violence against the LGBT+ community. This detracts from the region’s openness and hurts cities’ ability to foster innovation ecosystems and attract skilled workers.

# Western Europe

## City is inclusive and competitive

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

## City is partially inclusive and competitive

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

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### Amsterdam is the most *inclusive and competitive* city in the world

Amsterdam is one of the most innovative, globally connected and socially inclusive cities in the world. It comes as no surprise that it topped our City Ratings this year.

Amsterdam has many of the ingredients that make for healthy and sustainable economies: Established multinational companies, a burgeoning start-up ecosystem, world-class universities, a high quality of life and strong innovation. The city is home to the regional headquarters of global companies, such as Nike, Cisco and Netflix. It is also the base for many Dutch multinational corporations, including Philips, ABN AMRO, ING, Unilever and Royal Dutch Shell.<sup>29</sup> Additionally, Amsterdam has a strong start-up ecosystem, supported by incubators like B.Amsterdam, which aims to turn Amsterdam into the largest start-up ecosystem in Europe.<sup>30</sup>

Amsterdam not only excels at economic competitiveness; it also has a strong culture of LGBT+ inclusion that signals to the world that the city is open to all. With an LGBT+ social scene dating back to 1927 and located in the first country to legalize same-sex marriage in 2000, Amsterdam is an inclusive city with a mayor who is vocally supportive of LGBT+ inclusion.<sup>31</sup> The city is also home to Workplace Pride, one of the world's leading LGBT+ organizations focused on advancing workplace inclusion for LGBT+ people around the world. It is not surprising that Amsterdam receives the highest Social Attitude score in Europe.

### Madrid's rating falls amid questionable support for inclusion

Madrid is a highly-rated, inclusive and competitive city. However, since 2018, the city's rating declined slightly. Madrid has a mixed economic story, with increases in areas like competitiveness, but worse performance in innovation and entrepreneurship. Additionally, the city remains an inclusive and welcoming place for LGBT+ people. However, this has shown signs of changing. Madrid's new mayor, José Luis Martínez-Almeida, has received criticism from the LGBT+ community for watering down the city's Pride messaging. His party is also allied with a far-right party that is openly anti-LGBT+.