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The Global Talent Competitiveness Index 2020

*Global Talent in the Age
of Artificial Intelligence*

HIGHLIGHTS



Bruno Lanvin and Felipe Monteiro, Editors



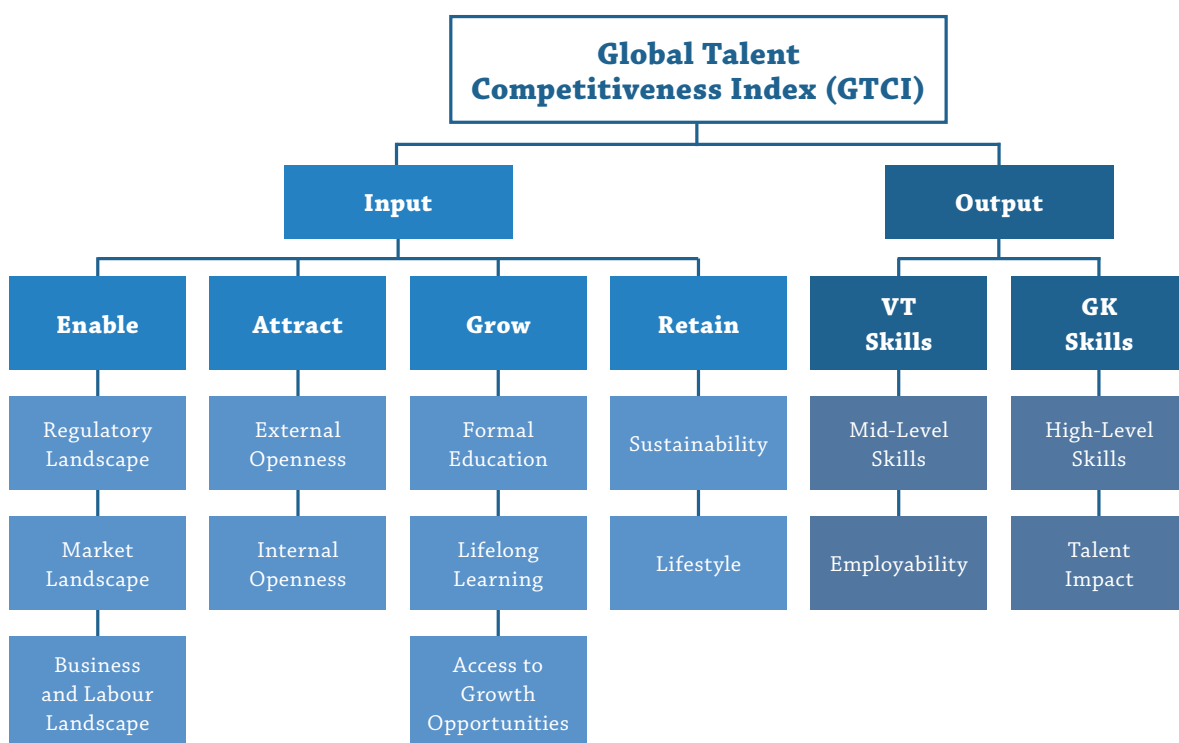
Introducing the *Global Talent Competitiveness Index*

The first edition of the **Global Talent Competitiveness Index (GTCI)** was published in November 2013, capitalizing on INSEAD's successful experience in developing two other major Global Indices on Innovation (GII) and Global Information Technology (GITR). Given the vital importance of talent for prosperity, the ambition of GTCI is to be an action tool for continuous improvement in linking talent to economic development, and an instrument to stimulate dialogue between governments, businesses, academia, professionals and their associations, and citizens.

Addressing the theme of *Global Talent in the Age of Artificial Intelligence*, this seventh edition of GTCI explores how the development of Artificial Intelligence (AI) is not only changing the nature of work but also forcing a re-evaluation of workplace practices, corporate structures and innovation ecosystems. As machines and algorithms continue to affect a multiplicity of tasks and responsibilities and almost every job gets reinvented, the right talent is required not only to carry out new responsibilities and ways to work, but also to capture value from this transformative technology. This topic stands at the heart of the debate in this era of the Fourth Industrial Revolution as AI has become a game-changer in every industry and sector. Current education and skills acquisition will be transformed as well, implying that formal and informal learning structures must evolve to meet the needs created by this very same AI-driven world. Which companies, cities or countries are best positioned to benefit from the AI revolution? How can we guarantee that a joint effort be made to ensure that AI-driven increased productivity benefits society as a whole?

The GTCI model keeps evolving

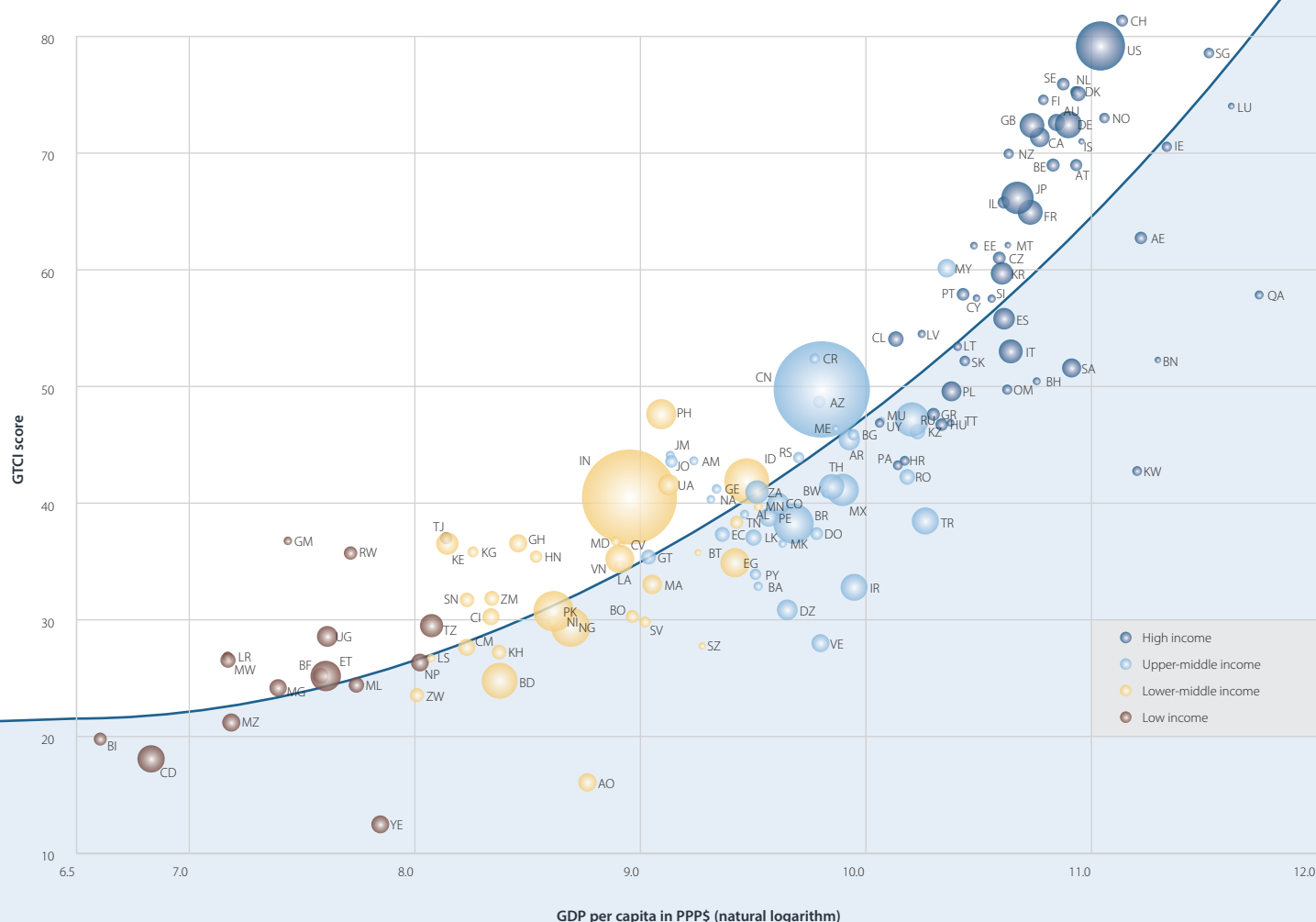
GTCI covers national and organisational parameters and generates insights to inspire action. Based on feedback and further analyses following the release of previous editions of the report, this year's index includes 70 variables. It covers 132 national economies, across all groups of income and levels of development. The GTCI is a composite index, relying on a simple but robust Input-Output model, composed of six pillars (four on the Input side and two on the Output side), and has (1) four pillars on the input side — Enable, Attract, Grow and Retain — focusing on actions for policymakers and business leaders, and (2) two output pillars, benchmarking national performances in Technical/Vocational and Global Knowledge skills, respectively.



Competitiveness through talent

– in organisations and nations

As in previous editions of GTCI, the positive correlation remains high between economic performance on the one hand and national talent competitiveness on the other. This is also true for cities (155 of them have been ranked in the report's special section on cities and regions). Yet since countries and cities have different contexts, their creative strategies and local innovations illuminate best practices that may inspire others. Moreover, this year's edition provides an opportunity to detect how, if at all, talent competitiveness is evolving in countries around the world, comparing performances in the GTCI over two three-year periods: 2015–2017 against 2018–2020.



Note: GDP per capita in PPP\$ and population data (represented by the size of the bubbles) are for 2018 or the latest year available. The data are drawn from the World Bank's World Development Indicators database. The trend line is a polynomial of degree two ($R^2 = 0.78$).

ISO-2 country codes are listed on page 16 of *The Global Talent Competitiveness Index 2020*.

Highlights from the GTCI 2020 edition

- ❑ The gap between talent champions (almost all of them high-income countries) and the rest of the world is widening.
- ❑ Turning AI into a force for good requires a proactive, cooperative approach.
- ❑ When introducing AI to organisations, communities, or societies as a whole, acceptability is a condition for sustainability.
- ❑ AI may provide significant opportunities for emerging countries to leapfrog.
- ❑ The emergence of AI in the workplace requires a massive re-skilling of the workforce.
- ❑ Cities are striving to become AI hubs and attract relevant talents.

GTCI 2020 – Top 20

The top of the GTCI rankings is still dominated by Europe, with only 7 non-European countries in the top 20: the United States (2nd), Singapore (3rd), Australia (10th), Canada (13th), New Zealand (16th), Japan (19th), and Israel (20th).

As was the case in previous editions, GTCI 2020 champions include a significant number of small high-income economies, many of them being either landlocked, island or quasi-island economies, including Switzerland (1st), Singapore (3rd), Luxembourg (8th), Iceland (14th), Austria (17th). Such economies have developed relatively open socio-economic policies in which talent growth and management are central priorities. All Nordic countries can also be found in this high performance group.

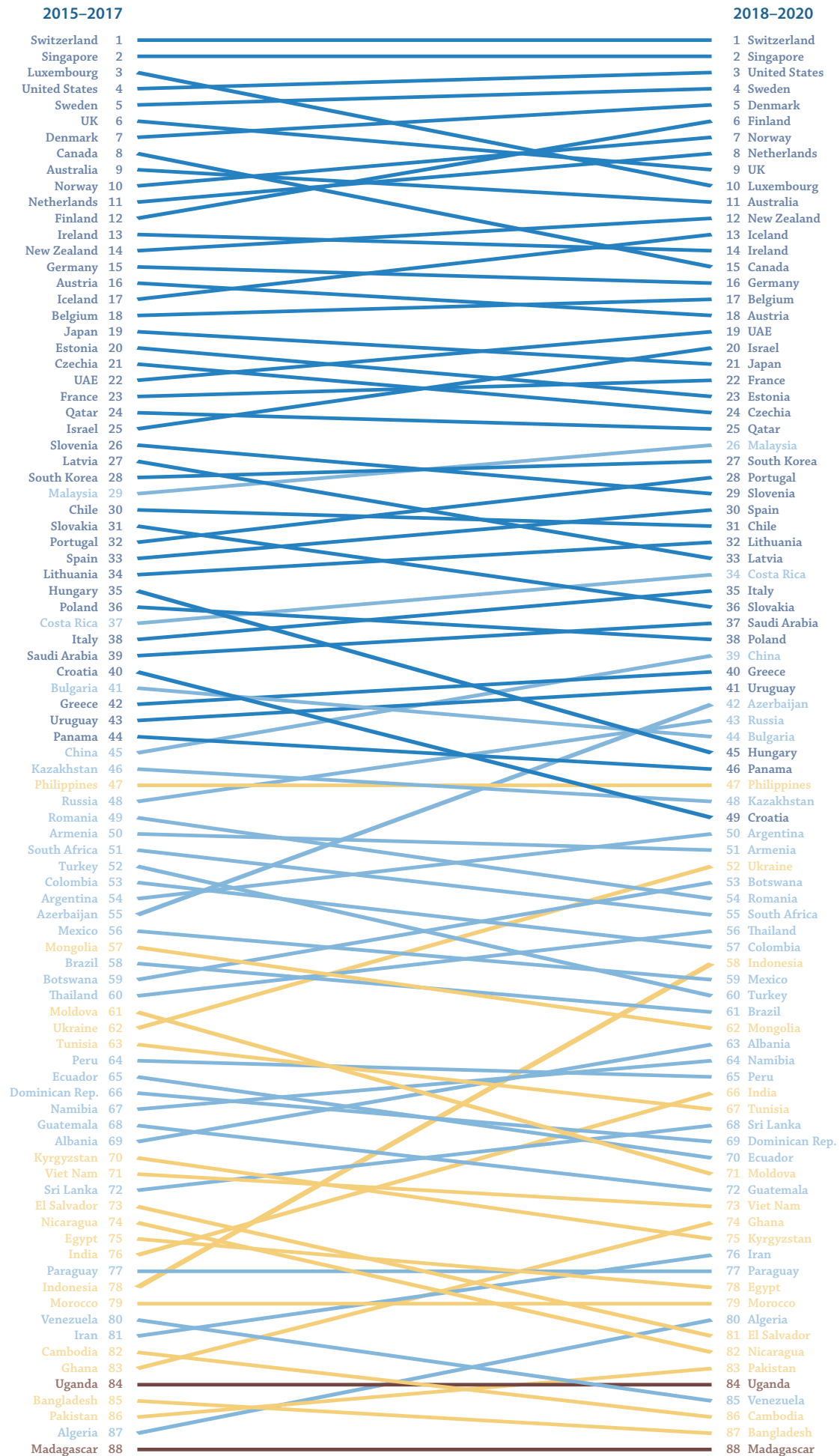
Since the creation of GTCI, one of its central findings has been that openness is key to talent competitiveness. Openness will remain a key factor to grow, attract and retain talent in the age of AI.

Compared to previous editions, GTCI 2020 shows a continued strong performance by larger cities, in particular in the United States (7 among the top 20). Cities (especially smart cities) remain ideal testbeds for new AI-based services and strategies.

COUNTRY	SCORE	OVERALL RANK
Switzerland	81.26	1
United States	79.09	2
Singapore	78.48	3
Sweden	75.82	4
Denmark	75.18	5
Netherlands	74.99	6
Finland	74.47	7
Luxembourg	73.94	8
Norway	72.91	9
Australia	72.53	10
Germany	72.34	11
United Kingdom	72.27	12
Canada	71.26	13
Iceland	70.90	14
Ireland	70.45	15
New Zealand	69.84	16
Austria	68.87	17
Belgium	68.87	18
Japan	66.06	19
Israel	65.66	20

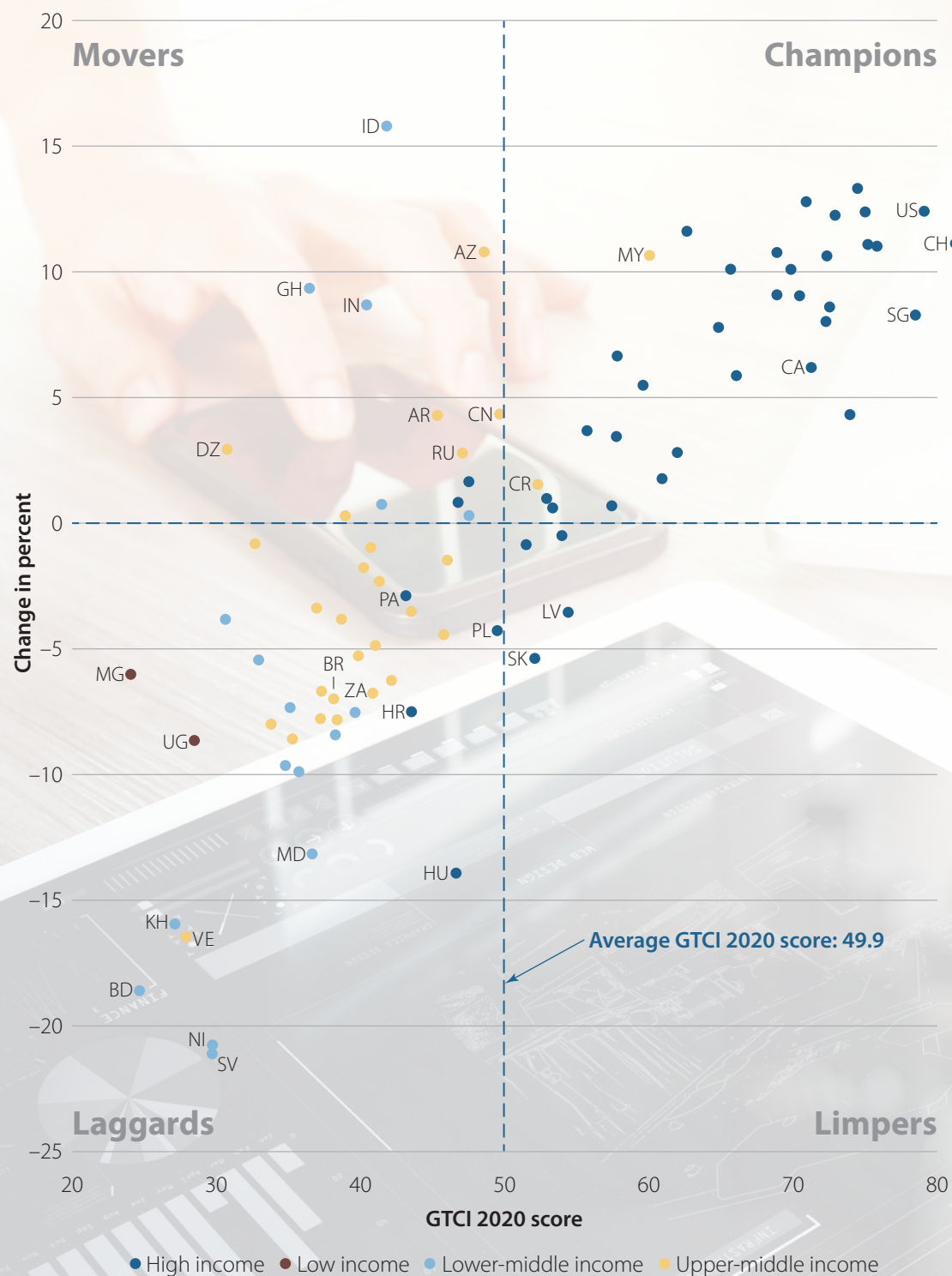
CITY	SCORE	OVERALL RANK
New York	73.7	1
London	71.7	2
Singapore	71.4	3
San Francisco	68.1	4
Boston	66.8	5
Hong Kong	66.4	6
Paris	65.7	7
Tokyo	65.7	8
Los Angeles	62.8	9
Munich	61.9	10

GTCI rankings in 2015–2017 and 2018–2020



Note: Colours refer to income groups, which range from dark blue (high income) to light blue (upper-middle income), light brown (lower-middle income), and dark brown (low income).

Change in scores for 2015–2017 vs 2018–2020 and GTCI 2020 score



ISO-2 country codes are listed on page 16 of *The Global Talent Competitiveness Index 2020*.


Beyond the Rankings

While the index rankings are at the core of the GTCI report, the analytic chapters contribute important context and insights by exploring critical aspects of talent competitiveness. The introductory chapter, written by the GTCI team at INSEAD (consisting of the directors Dr Bruno Lanvin and Professor Felipe Monteiro, with Michael Bratt), provides the background to this year's report, also outlining its key messages. It also includes an annex on the talent competitiveness performance of each of the income groups and regions of the 132 national economies covered by GTCI 2020.

Four additional chapters, authored respectively by Stefanini, OECD, ITU, and MIT & INSEAD, and two special interviews of Nicolas Schmit and Anja Hendel consider various aspects of global talent in the age of AI. This GTCI edition also includes — as in previous years — **a special section on the talent competitiveness of cities and regions**, with a significantly larger coverage, as it now includes 155 cities.

Last but not least, a separate chapter has been authored by the Joint Research Centre of the European Union. As the recognised world authority on composite models, JRC has performed an in-depth audit of the GTCI model and methodology. As in previous years, the JRC chapter summarises the results of that audit (which confirms the robustness of the GTCI approach), and offers insights for possible further research in the area of talent competitiveness.

Detailed country tables and data tables are also offered as part of the report, providing additional possibilities for researchers, policy makers and decision makers to deepen their own reading and analysis of GTCI data. The full report and its tables can be freely downloaded from the GTCI website at **<https://www.insead.edu/global-indices>**



About GTCI's Partners



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Contributors and Advisory Board

This edition of the GTCI Report is the result of a partnership between academia and business: between INSEAD, the Adecco Group, and Google. Beyond these faithful partners, our gratitude goes to the individuals and institutions who contributed chapters to this seventh edition, as well as to our Advisory Board, composed of prominent personalities representing academia, government and business. Their continuous support remains a key component of GTCI's global success.

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Opportunities for future partnerships

INSEAD and its existing partners welcome future partners. The GTCI's partners believe in the role of talent in increasing the competitiveness of countries.

All partners would be invited to contribute analytical chapters or case studies to the GTCI Report, and to participate in the discussion and dissemination of results. They are acknowledged by the inclusion of their logo on the cover and all relevant documents produced.

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