

What makes a nation a Digital Hub?

Defining Digital Hubs: insights and metrics

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1.

Abstract

Nations striving to lead in the global digital economy often use the term 'Digital Hub' to describe themselves.

But this term is not always defined, nor does it offer measurable benchmarks. This can result in claims of leadership that cannot be substantiated.

This paper addresses this issue. It uses a comprehensive system that we call the Axon Digital Hub Index (ADHI) to offer a clear framework with which to define, evaluate, and benchmark Digital Hubs.

The ADHI evaluates nations across four critical pillars: Infrastructure, Digital Economy, Key Players presence in the local market, and People and Talent. It reveals the top performers, like Singapore, the Netherlands, and the United States. It also showcases the essential characteristics of a successful Digital Hub, highlighting the importance of robust infrastructure, a thriving digital economy, the presence of key players, and skilled talent pools.

The ADHI is especially useful for nations that see themselves as aspiring Digital Hubs. Both this paper and the ADHI focus on emphasising the necessity of an integrated approach. One that combines open regulatory environments with incentives to attract key players and foster infrastructure development.

But that is not all. The ADHI also provides actionable insights that can help nations to pinpoint lagging metrics and address gaps.

In short, this paper not only shows what makes a nation a leading Digital Hub, but is also a guide for nations aiming to become Digital Hubs. It can help these nations accelerate their journey toward digital leadership, fostering innovation, connectivity, and global competitiveness.

2. Introduction

The digital economy is redefining global competitiveness, driving transformative growth, and reshaping industries across the world. Becoming a Digital Hub is a pivotal ambition for nations that want to be at the forefront of the digital economy.

However, the term 'Digital Hub' is loosely defined. Nations that assert their status as Digital Hubs rarely back this assertion with robust frameworks or measurable criteria.

This white paper is designed to address this issue. It offers our view – a measurable, definable view – on what it truly means to be a Digital Hub. It provides a structured, evidence-based approach, one that aims to demystify the concept, evaluate the positioning of nations and highlight the key attributes that distinguish ambitious claims from real, measurable success.

Our four objectives are to:

- **Define**

We aim to establish a clear definition of a Digital Hub. One that assesses infrastructure, digital economy, the presence of key players in the local market, and the people and talent ecosystem in the country.

- **Measure**

We use quantifiable criteria to assess a carefully curated list of countries against this definition.

- **Identify**

Which nations are Digital Hubs? And which are in transition? We aim to answer these questions.

- **Learn**

We offer insights from leading Digital Hubs that aspiring countries can use.

Put simply, this white paper aims to serve as a guide for governments and regulators in identifying and addressing gaps on their path to achieving Digital Hub status.

Nations that assert their status as Digital Hubs rarely back this assertion with robust frameworks or measurable criteria.

3.

What is a Digital Hub?

Becoming a digital or communications hub is a common goal for many cities and regions worldwide. Nations regularly unveil ambitious digital strategies for the coming decades, with terms like 'digital transformation' and 'Digital Hub' frequently dominating the conversation. But what is a Digital Hub?

In the Forbes article *Building Economic Value with Digital Hubs*¹, the IT and telecom sectors are shown as a wheel with a hub and spokes. The Digital Hub is the central point – the axle – connecting to the spokes, which represent smaller centers or markets in the surrounding region. This central role enables the city or region to provide essential services to its broader network and underscores its strategic importance in the sector.

But why do hubs emerge? According to Alfred Marshall's book *Principles of Economics*, concentrating industries within specific regions helps create an environment that supports economic growth. The resulting reduced transportation needs and easier access to skilled labor and shared resources enhance overall efficiency and productivity.

As the Forbes article shows, Digital Hubs are similar to financial and logistics hubs. Just as financial hubs like London and New York help to concentrate institutions and infrastructure critical to global financial operations, so Digital Hubs bring together data centers, internet exchanges, and connectivity networks to support the digital economy. Both types of hub also rely on robust regulatory frameworks, seamless market access, and world-class infrastructure to attract global players.

This concentration creates self-sustaining ecosystems, driving economic activity, fostering innovation and solidifying the roles of such hubs as essential nodes in the global economy.

Just as financial hubs like London and New York help to concentrate institutions and infrastructure critical to global financial operations, so digital hubs bring together data centers, internet exchanges and connectivity networks to support the digital economy.

1 Building Economic Value With digital hubs. <https://www.forbes.com/councils/forbestechcouncil/2022/08/31/building-economic-value-with-digital-hubs/>

What makes a nation a Digital Hub?

With this in mind, this paper offers the following definition:

*A **Digital Hub** is an ecosystem that supports the digital economy by enabling efficient data exchange, storage, and processing within a specific region, while also acting as a critical node in the global digital network. It combines advanced infrastructure, skilled talent, innovation, and a supportive regulatory environment to attract global players, foster entrepreneurship, and drive economic growth. A Digital Hub is designed to enhance regional connectivity, ensure sustainability and resilience, and serve as a platform for digital transformation and technological advancement.*

This definition of a Digital Hub underscores the pivotal role of the four pillars mentioned earlier:

- Infrastructure
- The Digital Economy
- Key Players presence
- People and Talent

These four factors are interconnected. The arrival of key players, along with investments and operations that fuel growth, drives the development of advanced infrastructure ecosystems. This strengthens the digital economy, encouraging further innovation and expansion. The presence of robust infrastructure and a mature digital economy attracts more players, establishing a virtuous cycle of growth and development. Finally, a skilled local talent pool enhances the ecosystem's ability to sustain and evolve, reinforcing its overall appeal.

What makes a nation a Digital Hub?

As well as the pillars, there needs to be a Supportive Regulatory Environment. This lays the groundwork for a nation to become a hub, fostering growth and connectivity.

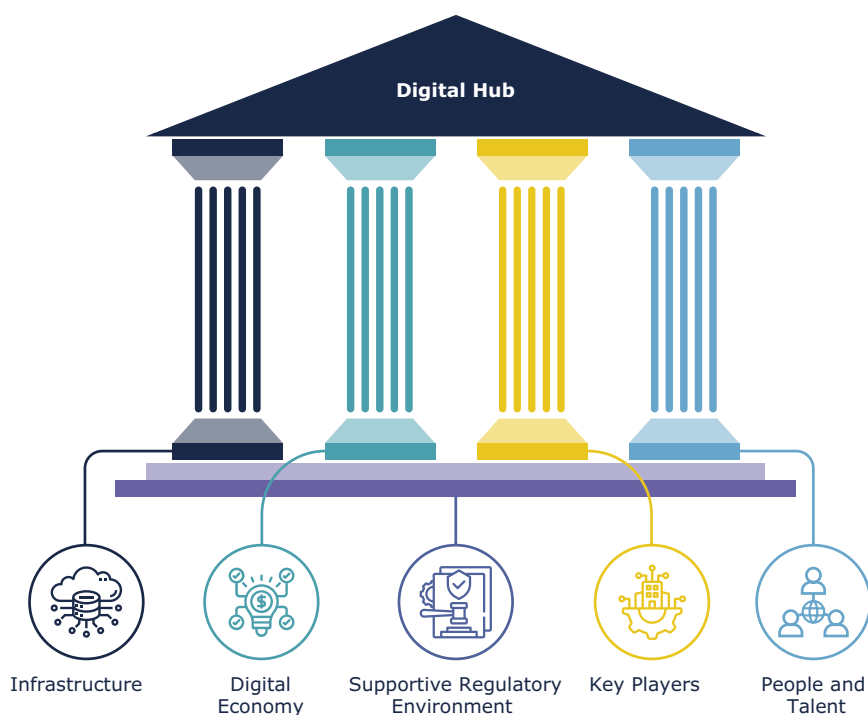


Figure 1: Main characteristics of a Digital Hub [Source: Axon Consulting]

The next sections of this chapter provide a detailed exploration of both the pillars and the supportive regulatory environment, illustrating how they contribute to the development and success of a Digital Hub.

3.1. Infrastructure

The Infrastructure pillar comprises the physical and technological components that enable efficient data exchange, storage, and processing. Each component plays a critical role in ensuring seamless connectivity, high-speed data transmission, and reliable operations, both regionally and globally, attracting leading companies from a variety of industries.

Key components of this pillar are:

- **Data centers**

Data centers are essential for supporting digital services, hosting cloud applications, and enabling real-time data processing, all of which are fundamental to a digital economy. Their reliability, scalability, and proximity to end users directly influence performance and attract businesses.

- **Cable landing stations**

Cable landing stations act as gateways for international data traffic, enabling robust global connectivity. A well-distributed network of landing stations ensures redundancy, resilience, and reduced latency, making the hub attractive to investors and service providers.

- **Subsea cables**

The number and diversity of subsea cables determine the hub's ability to handle large volumes of international traffic. Multiple cables reduce the risk of disruptions, enhance bandwidth availability, and position the hub as a critical node in the global network.

- **Terrestrial cables**

High-speed connectivity – both national and across borders – is essential for any digital operation. International terrestrial connectivity can work with subsea cables (for redundancy, say) or instead of them, especially in landlocked countries. National connectivity is crucial to connect any operation in a country (such as data centers) with other parties and to reach international gateways.

- **Internet exchange points (IXP)**

The number and distribution of IXPs reflect the efficiency of a country's local data interconnectivity. A well-developed IXP network also enhances a country's role as a data connectivity hub, enabling seamless regional and global data exchanges.

3.2. The Digital Economy

While it can act as a catalyst for a nation becoming a Digital Hub, the Digital Economy pillar mainly showcases what has been achieved once the country has established itself as one. It serves as an indicator of a country's ability to leverage digital technologies for economic growth, investment attraction, and revenue generation. For example:

- **ICT as part of GDP**

The size of the economy coming from the ICT (or digital) sector shows how effectively the nation leverages technology for innovation, productivity, and competitive advantage in global markets.

- **Foreign direct investment (FDI)**

High FDI shows investor confidence in the country's digital readiness, bringing in capital to fund digital projects, infrastructure, and innovation while fostering job creation and economic activity.

3.3. Key Players presence

The presence of several stakeholders within the digital ecosystem underlines a country's status as a Digital Hub.

Key players in this context are:

- **Hyperscalers**

Hyperscalers deliver scalable cloud computing and storage solutions, supporting innovation and extensive digital service capabilities.

- **Internet protocol transit (IPT) providers**

IPT providers ensure efficient data routing and interconnection between networks, providing high-speed, low-latency links, essential for smooth operations.

- **International carriers**

International carriers facilitate robust cross-regional data exchange, enhancing a hub's global connectivity and strategic importance.

- **Carrier-neutral data centers**

Carrier-neutral data centers offer transparent and non-discriminating access to their infrastructure for managing and processing data effectively.

3.4. **People and Talent**

Technological advancement depends not only on infrastructure but also on the knowledge and creativity of human capital. The People and Talent pillar shows the country's ability to attract, develop, and retain a skilled workforce, equipped with the expertise needed to support digital transformation.

3.5. **Supportive Regulatory Environment**

A supportive regulatory environment is essential for any aspiring Digital Hub, as it ensures a predictable, transparent, and well-documented framework that guarantees legal and operational clarity, predictability in business practices, and fair competition. This includes defining the legal and regulatory implications of doing business in a country, particularly for large organisations seeking stable conditions for operations.

It also facilitates the adoption of digital technologies and encourages innovation, positioning a country or region as a reliable and attractive ecosystem for long-term growth and collaboration.

4. Which countries are Digital Hubs?

We have defined a Digital Hub. But which countries qualify as Digital Hubs?

This analysis² prioritises result-oriented pillars – those that reflect tangible outcomes – over enabling factors, such as the regulatory environment. It includes all the components highlighted in the previous section for Infrastructure, Digital Economy, Key Players, and People and Talent, as these pillars represent measurable indicators of a nation's established status as a Digital Hub. On the next page, Figure 2 shows how leading countries perform against these key pillars³.

² Refer to the Annex for more detail on the methodology and the data utilised for calculating the metrics of each pillar

³ Please note that the index only shows those countries for which we have information to measure all the pillars

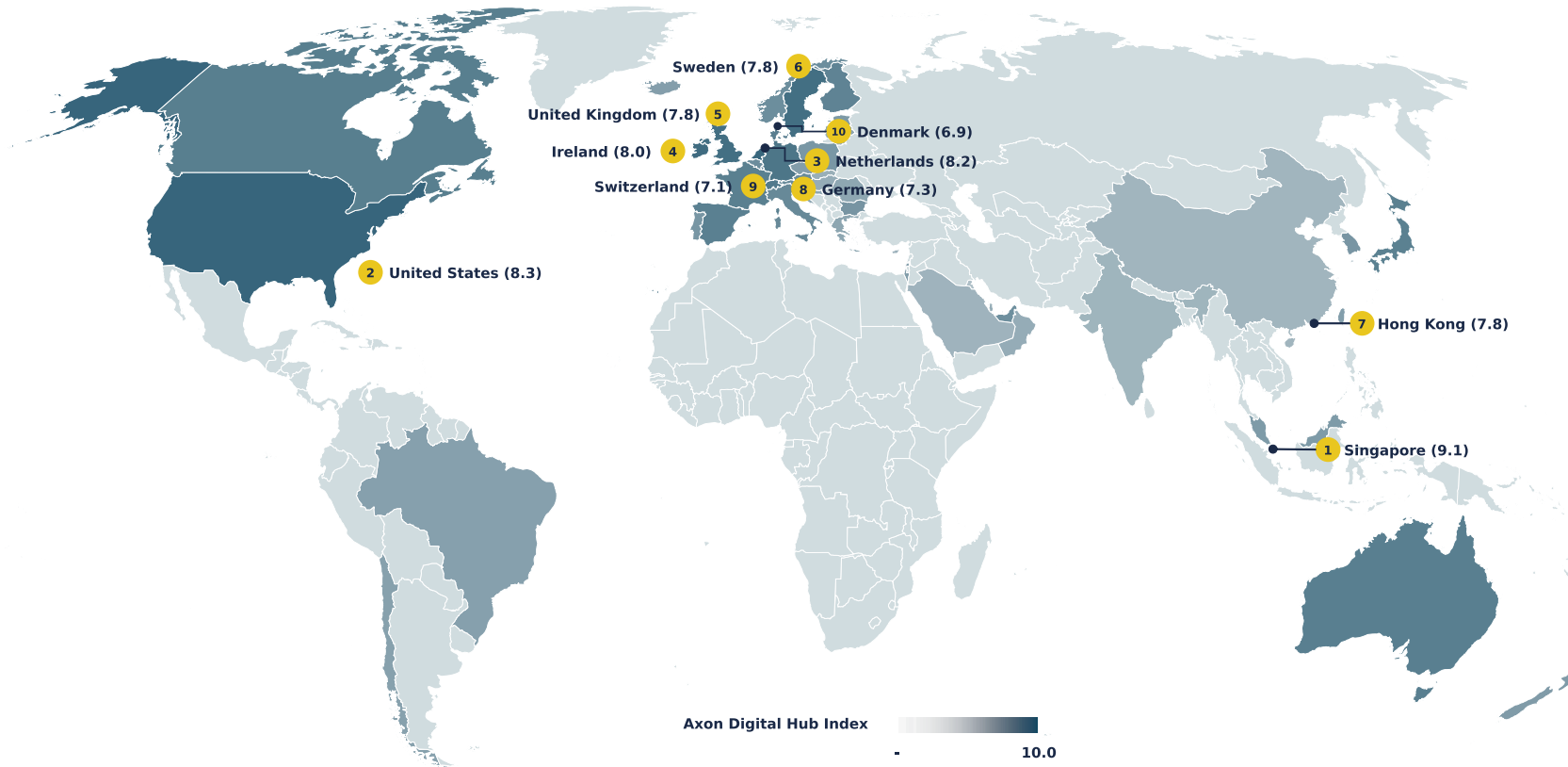


Figure 2. Axon Digital Hub Index Results [Source: Axon Consulting]

What makes a nation a Digital Hub?

The ADHI reveals that Singapore, the US, the Netherlands and Ireland lead the rankings, with a balanced performance in each pillar.

The remainder of the top 10 includes European countries, along with Hong Kong, primarily driven by high scores in the **Key Player presence** pillar and a relatively strong performance in the **Digital Economy** pillar.

Some countries traditionally regarded as Digital Hubs fall below expectations. France, Japan, and South Korea, despite their strategic advantages as interconnection points, score less well in some pillars:

■ France

Marseille serves as a vital node connecting Europe with Africa and Asia through numerous submarine cables. However, France ranks 13th in the ADHI. The country performs well in the Key Players and People and Talent pillars. However, it lags in Infrastructure and Digital Economy. Specifically, France shows lower cable landing station concentration and IXP traffic compared to other countries in infrastructure, and lower foreign direct investment in the digital economy, impacting its overall ranking.

■ Japan

Tokyo and Osaka are two of the largest technology hubs globally and yet Japan ranks 15th in the ADHI. Why? Simply put, Japan excels in the Key Players pillar but underperforms in others, let down by the availability of data centers and cable landing stations in the infrastructure pillar, and foreign direct investment in the Digital Economy pillar.

■ South Korea

Renowned for its ultra-fast internet, extensive 5G network, and digitised public services, South Korea, which ranks 24th, excels in the People and Talent pillar. However, its overall performance is undermined by significant challenges in attracting key digital players. This lack of major players is a key limitation, which, along with the more modest infrastructure metrics and a low score in foreign digital investment, contributes to South Korea's moderate ranking in the ADHI.

These results also show that key Digital Hubs are concentrated in North America, Europe and South-East Asia. Other regions such as South America, Africa and the Middle East are lacking clear Digital Hubs.

The ADHI reveals that Singapore, the US, the Netherlands and Ireland lead the rankings, with a balanced performance in each pillar.

While most Middle East countries rank lower, many of these countries aspire to become regional Digital Hubs, as their national strategies indicate. For instance:

- **UAE (22nd)**
Initiatives like the Smart Dubai project, Dubai Future Foundation, Vision 2021, and Centennial 2071 highlight the UAE's ambitions.
- **Bahrain (40th)**
Efforts here focus on leveraging a progressive regulatory environment⁴ and substantial infrastructure investments⁵.
- **Oman (41st)**
Notable here are plans for free zones supporting data centers including electricity subsidies and corporate tax exemptions.⁶
- **Qatar (44th)**
Strategic initiatives in Qatar target enhancements in digital infrastructure, regulatory frameworks, and talent development.⁷
- **Saudi Arabia (47th)**
Vision 2030, which aims to diversify the country's economy, society, and culture, underscores the Saudi commitment to digital transformation.

There has been progress in fostering supportive regulatory environments. However, Middle East countries have yet to attract enough key players required to establish themselves as global Digital Hubs. The United Arab Emirates (UAE) ranks highest among its regional peers in this pillar but still lags significantly behind the top-performing countries. That said, the UAE stands out at 22nd, outperforming nations like South Korea and Portugal.

However, Middle East countries have yet to attract enough key players required to establish themselves as global Digital Hubs.

4 The "Cloud First" policy aims at encouraging both public and private sector organizations to prioritize cloud computing solutions (2017).
5 AWS (Amazon Web Services) has established a regional data centre in Bahrain, providing advanced cloud services to businesses in the region.
6 Consultation launched in 2021 including recommendations such as developing free zones to support data centres business, subsidizing electricity and exempting corporate tax (<https://tra.gov.om/En/ViewPublicConsultations.jsp?code=31>)
7 For example, the Qatar National Vision 2030, the Digital Agenda 2030 and the National Broadband Plan.

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Portugal (25th) is another country striving to become a Digital Hub. Despite its progress, Portugal faces challenges in attracting key digital players; this remains its weakest pillar. To address this, Portugal has introduced several initiatives, including the Cable Protection Zone⁸. This initiative focuses on enhancing submarine cable protection and streamlining the pre-licensing process for cable routes. It also aims to establish robust and diverse fronthaul infrastructures linking the Sines data center, the EllaLink Cable Landing Station, and other landing points. These regulatory advancements aims to position Sines, a town on the western coast, as a secure, low-risk, and highly attractive destination for international cable operators.

⁸ The initiative is part of the Atlantic Hub

5. Lessons learnt

The Axon Digital Hub Index highlights why nations such as Singapore, the United States, the Netherlands, and Ireland lead the rankings.

Regulatory openness is the cornerstone of this achievement. For instance, the World Bank ranks Singapore as the most business-friendly economy globally⁹, citing its streamlined processes for company registration, tax compliance, and other business-related activities.

These nations demonstrate how a strategic regulatory vision, a supportive business environment, infrastructure investment, and human capital development converge to create thriving Digital Hubs.

They also show countries aspiring to achieve Digital Hub status that they must adopt an integrated approach. As we have said, prioritising an open regulatory environment to attract key players and incentivize infrastructure development is crucial. By leveraging the Digital Hub Index, countries can pinpoint specific areas of improvement, enable targeted initiatives to bridge gaps and accelerate progress toward becoming leading Digital Hubs.

⁹ <https://www.worldbank.org/en/news/press-release/2013/10/28/singapore-business-friendly-economy-world-philippines-top-ten-improving-business-regulation>

Annex A.

Metrics and data

A.1.

Country selection

The countries selected are the top 60 countries in the UN Telecommunications Infrastructure Index (TII). Ranking these countries involved a comprehensive evaluation process based on several quantitative metrics.

Out of the initial list of 60 countries, two new countries (Bahrain and Brazil) have been included due to their relevance in the digital world in recent years. The following 14 countries have been eliminated due to insufficient data for evaluation: Andorra, Bahamas, Belarus, Brunei, Monaco, Montenegro, Russia, San Marino, Serbia, Seychelles, and Uruguay.

A.2.

Index calculation methodology

The Axon Digital Hub Index evaluates and ranks countries based on performance in four key pillars: Infrastructure, Digital Economy, Key Players, and People and Talent. Each pillar contributes a specific weight to the overall Digital Hub Index score, reflecting its importance in defining a successful Digital Hub:

Pillar weights

Infrastructure 35%	Digital Economy 20%	Key Players presence 35%	Talent 10%
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Figure 3: Axon Digital Hub Index, Pillar weights [Source: Axon Consulting]

What makes a nation a Digital Hub?

Within each pillar, several factors are used to compute the pillar score. Each factor has a specific weight, and all factors weigh up to 100% within the respective pillar. The following subsections offer further information on this process.

A.2.1. Pillar calculation methodology

For each pillar of the Axon Digital Hub Index, the following standardised approach has been used to calculate its score:

- **Data collection and metric calculation**

Data for each factor within the pillar was gathered from publicly available and reputable online repositories. Specific sources are outlined in each pillar subsection. To establish a standardised framework for evaluating the components of a Digital Hub, two foundational metrics – population, extracted from the UN database¹⁰, and gross domestic product (GDP), extracted from the WorldBank database¹¹ – serve as the baseline for several calculations.

- **Data normalization**

To ensure comparability across regions and avoid bias due to different scales or units of measurement, all raw data points for each factor were normalised. This process transforms the values into a standardized 0 to 10 scale, where:

- 0 represents the lowest observed value across all regions.
- 10 represents the highest observed value across all regions

Given the distinct nature of the data within each pillar, the normalisation method applied varies. The specific approach used for each pillar is detailed in the respective subsection.

- **Weighted calculation of pillar scores**

After normalising the values for each factor, the pillar score was computed as a weighted sum, with each factor's weight reflecting its relative significance within the pillar.

¹⁰ <https://population.un.org/wpp/>

¹¹ <https://data.worldbank.org/indicator/NY.GDP.MKTP.CD>

A.2.2. Infrastructure pillar

This index evaluates the physical and technological infrastructure of a country. Following the standardised approach mentioned above, the Infrastructure pillar has been calculated as follows:

Data collection and metric calculation

Metric	Sources of information
Data centers per million capita	Data center map ¹²
Cable landing stations per million capita	TeleGeography Submarine cable map ¹³
Number of subsea cables	TeleGeography Submarine cable map ¹³
IXP Traffic per million capita (TeraBytes)	PeeringDB ¹⁴

Table 1: Sources of information for each metric – Infrastructure pillar

Planned projects that are not yet operational have been excluded from this information.

Additionally, landlocked nations may rank lower in the index as key infrastructure components like submarine cables and CLS are not present. We could not include transborder terrestrial connections as relevant and structured information is not available.

Data normalisation

To address the highly skewed distributions in the datasets, a two-step process was used: log transformation followed by min-max normalisation. Log transformation reduces the impact of extreme values, while min-max normalisation scales all components to a comparable range. This approach ensures a balanced representation of the data, highlighting smaller values without allowing large values to dominate the results.

¹² <https://www.datacentermap.com/datacenters>

¹³ <https://www.submarinecablemap.com>

¹⁴ https://www.peeringdb.com/advanced_search

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Weighted calculation of pillar scores

The final score for the Infrastructure pillar is the weighted sum of the normalized scores of each metric. The weights used are displayed below:

Metric weights

DC/mn capita 30%	CLS/mn capita 15%	# Subsea cables 15%	IXP Traffic (TB)/mn capita 40%
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Figure 4: Infrastructure pillar, metric weights [Source: Axon Consulting]

A.2.3. Digital Economy pillar

This index evaluates the economic factors that support and drive the digital economy within a Digital Hub. Following the standardised approach mentioned above, the Digital Economy pillar has been calculated as follows:

Data collection and metric calculation

Metric	Sources of information
Ratio FDI inflow vs GDP	UNCTAD ¹⁵
ICT GDP (USD/capita)	World Bank ¹⁶

Table 2: Sources of information for each metric – Digital Economy pillar

FDI is a general metric which may overestimate ranks for countries with relevant foreign investment focused in other sectors than the digital ecosystem. However, it appears to be the best available indicator of foreign investment in the digital ecosystem.

Data normalisation

As before, to address the highly skewed distributions in the datasets, a two-step process was used: log transformation followed by min-max normalisation. Log transformation reduces the impact of extreme values,

¹⁵ <https://unctadstat.unctad.org/datacentre/dataviewer/US.FdiFlowsStock>

¹⁶ openknowledge.worldbank.org/server/api/core/bitstreams/95fe55e9-f110-4ba8-933f-e65572e05395/content

while min-max normalisation scales all components to a comparable range. This approach ensures a balanced representation of the data, highlighting smaller values without allowing large values to dominate the results.

Weighted calculation of pillar scores

The final score for the Digital Economy pillar is the weighted sum of the normalized scores of each metric. The weights used are displayed below:

Metric weights	
FDI inflow (USD mn) / GDP (USD mn) 30%	ICT GDP (USD/Capita) 70%

Figure 5: Digital Economy pillar, metric weights [Source: Axon Consulting]

A.2.4. Key Players presence pillar

This index evaluates the presence and influence of key players in the digital ecosystem, including hyperscalers, carriers, and internet service providers, which are critical for the operation and growth of a Digital Hub. Following the standardised approach mentioned above, the Key Players pillar has been calculated as follows:

Data collection and metric calculation

Each metric looks at a different number of relevant players. The players selected for measuring each metric are based on their importance worldwide, volume of traffic handled and size. The companies selected are:

Hyperscalers		
Amazon	Google	Microsoft
Meta	IBM	Alibaba

Table 3: Relevant hyperscalers

IPT		
Arelion	Hurricane Electric	GTT Communications

Table 4: Relevant IPT providers

International carriers		
China mobile	Orange	Vodafone
Deutsche Telekom	AT&T	

Table 5: Relevant international carriers

DC carrier neutral		
Equinix	Digital Realty	NTT Data

Table 6: Relevant international carriers

Based on the above selections, the metrics used, and their sources of information are displayed in the table below:

Metric	Sources of information
Hyperscalers presence	PeeringDB ¹⁴ and each entity's website
IPT presence	Each entity's website
International carriers PoP	PeeringDB ¹⁴ PeeringDB database and each entity's website
Data center carrier – neutral presence	Each entity's website

Table 7: Sources of information for each metric – Key Players pillar

Data normalisation

Since the raw data for this pillar did not skew significantly, a min max normalisation method was applied. This method scales the values proportionally between a defined range without the need for transformations such as logarithms.

Weighted calculation of pillar scores

The final score for the Key Players presence pillar is the weighted sum of the normalised scores of each metric. The weights used are displayed below:

Metric weights			
Hyperscaler presence 35%	IPT Presence 20%	International Carriers PoP 20%	DC Carrier Neutral Presence 25%

Figure 6: Key Players pillar, metric weights [Source: Axon Consulting]

A.2.5. People and Talent pillar

This index evaluates the availability of skilled human capital and the knowledge resources needed to support and drive digital transformation within a Digital Hub. Following the standardised approach mentioned above, the People and Talent pillar has been calculated as follows:

Data collection and metric calculation

Metric	Sources of information
ICT Knowledge Index	IMD World Digital Competitiveness Ranking 2024 ¹⁷

Table 8: Sources of information for each metric – People and Talent pillar

Data normalisation

No normalisation method has been used for this pillar, since it comes from an index already normalised.

Weighted calculation of pillar scores

As the sole component of this pillar, the knowledge index directly determines the People and Talent pillar’s contribution to the overall Digital Hub index.

17 <https://imd.widen.net/s/xvhldkrrkw/20241111-wcc-digital-report-2024-wip>

Annex B.

Axon Digital Hub Index results

Rank	Country	Infra. pillar	Digital Economy pillar	Key Players pillar	People and Talent pillar	Axon Digital Hub Index
1	Singapore	9.0	7.7	10.0	9.5	9.1
2	United States	7.2	6.8	10.0	8.9	8.3
3	Netherlands	8.6	6.5	8.7	8.5	8.2
4	Ireland	8.0	9.1	7.3	7.9	8.0
5	United Kingdom	7.4	5.9	9.2	8.3	7.8
6	Sweden	8.0	6.6	7.9	9.1	7.8
7	Hong Kong	8.3	6.3	7.8	8.8	7.8
8	Germany	6.6	5.3	9.2	7.7	7.3
9	Switzerland	5.1	7.3	8.1	9.6	7.1
10	Denmark	7.8	5.5	6.2	8.6	6.9
11	Canada	6.9	5.5	7.0	8.6	6.8
12	Australia	7.6	4.7	7.0	8.1	6.8
13	France	6.3	5.2	8.0	7.5	6.8
14	Spain	6.1	4.4	8.7	6.9	6.8
15	Japan	6.0	4.5	8.7	6.6	6.7
16	Finland	7.5	6.1	5.3	8.1	6.5
17	Italy	6.1	4.1	7.6	5.7	6.2
18	Austria	4.8	5.3	7.2	7.7	6.0
19	Belgium	5.6	5.6	6.0	7.8	6.0
20	Norway	7.3	5.7	4.1	7.8	5.9
21	Luxembourg	6.3	8.4	3.6	6.9	5.8
22	United Arab Emirates	5.9	5.1	5.5	8.0	5.8
23	Bulgaria	6.6	4.1	5.3	4.5	5.5
24	South Korea	4.1	5.4	5.8	8.5	5.4
25	Portugal	6.2	4.3	4.7	6.7	5.4
26	Poland	5.5	3.8	5.8	6.0	5.3
27	Estonia	7.7	5.7	2.1	6.9	5.2
28	Malaysia	5.3	4.4	4.9	6.4	5.1
29	New Zealand	7.6	4.1	3.0	5.9	5.1
30	Israel	5.6	6.4	2.6	8.2	5.0

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Rank	Country	Infra. pillar	Digital Economy pillar	Key Players pillar	People and Talent pillar	Axon Digital Hub Index
31	Czech Republic	5.0	5.3	4.3	6.5	5.0
32	Taiwan	4.8	6.1	3.6	7.8	4.9
33	Iceland	8.8	5.6	0.2	6.6	4.9
34	Brazil	5.6	2.1	5.6	4.6	4.8
35	Chile	6.0	3.6	4.1	5.1	4.8
36	Latvia	7.3	4.5	1.6	5.9	4.6
37	Greece	6.1	3.2	3.5	4.9	4.5
38	Croatia	5.3	4.1	3.6	5.5	4.5
39	Romania	4.8	4.0	4.2	4.9	4.4
40	Bahrain	6.3	4.8	1.5	6.1	4.3
41	Oman	5.2	4.1	2.8	5.4	4.1
42	Hungary	3.5	4.4	4.2	5.2	4.1
43	Lithuania	6.4	4.0	1.0	7.1	4.1
44	Qatar	4.6	4.4	2.7	6.1	4.0
45	Slovakia	4.2	4.2	3.1	5.3	3.9
46	Cyprus	5.9	5.8	0.2	5.3	3.8
47	Saudi Arabia	4.8	4.4	1.3	6.8	3.7
48	India	2.2	0.5	6.6	5.2	3.7
49	China	1.2	3.3	4.8	8.0	3.6
50	Slovenia	4.5	4.4	1.0	6.8	3.5
51	Kuwait	4.0	4.4	0.7	5.1	3.0

Table 9: Axon Digital Hub Index, broken down by pillar [Source: Axon Consulting]

About Axon Consulting

Axon is an international firm founded in 2006 that provides investment and advisory services to a broad client base in the ICT and digital space in more than 70 countries across the world.

Axon's emerging technologies practice is at the core of our work and a growing priority for clients. We focus on strategy, policy, and market intelligence around a broad spectrum of next-generation technologies, engaging both private and governmental stakeholders. By partnering closely with decision-makers, Axon helps them anticipate trends, address critical challenges, and develop actionable roadmaps to harness the full potential of emerging technologies.

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