

AMAZON HQ2 PROPOSAL

VANCOUVER WE ARE HOME










We are cascadia
We are metro vancouver

We are home

From Downtown Vancouver to Seattle
Multiple options. Same-day access. Take your pick.

-  180 minutes by car
-  45 minutes by plane
-  45 minutes by nerdbird
-  40 minutes by drone
-  20 minutes by hyperloop

<< Compose

To Amazon

Cc

Subject: Amazon HQ2

Hello Amazon, it's nice to meet you (again).

We understand you are facing some growing pains in Seattle and are seeking a new home to support your quickly expanding family.

So let us (re)introduce ourselves: **we are Vancouver**, Amazon's home away from home.

In this document we reference "Vancouver" many times. Let us clarify what that represents. We are a metropolitan region of 22 municipalities and 11 First Nations with a total population of 2.5 million. We are situated in one of the world's most beautiful locations, rich in diversity, highly resourceful and a leader in sustainability. We offer an unsurpassed quality of life across an efficiently-connected collection of communities, and neighborhoods that are as unique as they are compelling.

The jurisdictions that comprise the region, and submit this proposal, have worked together to drive growth and economic prosperity. Going forward, this collaboration will lead to continued success and our region warmly welcomes Amazon to participate in this shared growth opportunity.

There hasn't been a lot of talk about us in the past few weeks and some have attempted to undermine us:

"Vancouver's too close, too young and they don't give out blank checks."

But that's exactly what makes us attractive...

Send



 See Appendix for a mapping of your proposal requirements back to the content included in this document

Here’s why Vancouver is HQ2:

1
Cultural Community Fit | Quality of Life

We are home

You’re here. You know us. You trust us. And you are already playing a pivotal role in shaping the region. With over 1,000 employees (and plans to double in size), you already have a vested interest in Vancouver and understand the unparalleled benefits it provides.

Whether it be our proximity to your Seattle headquarters, our key role in the booming technology cluster of the Cascadia Corridor or our unmatched status as the best place to live and work in the world, Vancouver is already the perfect home away from home for Amazon. So why not continue to expand in the best city in North America¹?

Establishing Amazon’s second home in Vancouver could result in a **cumulative savings of up to USD \$34 billion for office space, labor and health costs** over a 10-year horizon, relative to East Coast US competitors

¹ Economist Intelligence Unit 2017

2
Labor Force

We are the best positioned to support your growth

We are not only Vancouver; we are Canada. We attract, welcome and retain top talent from around the world and provide that talent with a strong, stable and supportive environment to thrive. Leading players such as Microsoft, Electronic Arts and Sony Pictures Imageworks have all set up in Vancouver for this very reason.

We also understand you are growing; so are we. We want to collaborate with you to cultivate a vision for the future of the region. While we may be home, Vancouver can provide Amazon with fresh air in the form of new ideas, unparalleled talent, and a community of leaders that have internalized a Day 1 mindset.

3
Sites | Time to Operations | Logistics

We are move-in ready

In typical Vancouver fashion, we’ve come together as a community to source what we think are the prime sites for Amazon’s HQ2. With sites ranging in size, location, unique features and nearby amenities, our options each offer a distinct advantage that could serve your business well in both the near and long-term.

Whether it’s being in the heart of the urban jungle, in the vicinity of creative companies or having room to breathe with an expansive campus development, we’ve been sure to keep your ambitions of today, tomorrow and the future top of mind as we propose sites.

So join us, and together we can accelerate Vancouver’s economic transformation and help you advance your global mission to be the world's most customer-obsessed organization

² CBRE Scoring Tech Talent 2017 Scaled for HQ2; savings estimate is relative to East Coast US competitors; foreign exchange may further amplify projected savings

4
Capital & Operating Costs | Incentives

We are the best value option

Our talent competes with the best, yet we have the lowest wages of all North American tech hubs. Combine that with some of the lowest office space costs and the benefits of Amazon diversifying its foreign exchange profile, and you have a compelling proposition that positions Vancouver as the most sustainable, low-cost operating environment for HQ2. Establishing Amazon’s second home in Vancouver could result in a cumulative savings of up to USD \$34 billion for office space, labor, and health costs over a 10-year horizon.²

Not only that, but proximity to your Seattle headquarters would bring added benefits in cost and time savings, as well as minimizing Amazon’s carbon footprint. Billions of dollars in savings means billions of dollars more to be poured into ideation, innovation and disruption that continue to shape and evolve how we live, work and play.

1 | We are home

Cultural Community Fit | Quality of Life



We are Vancouver

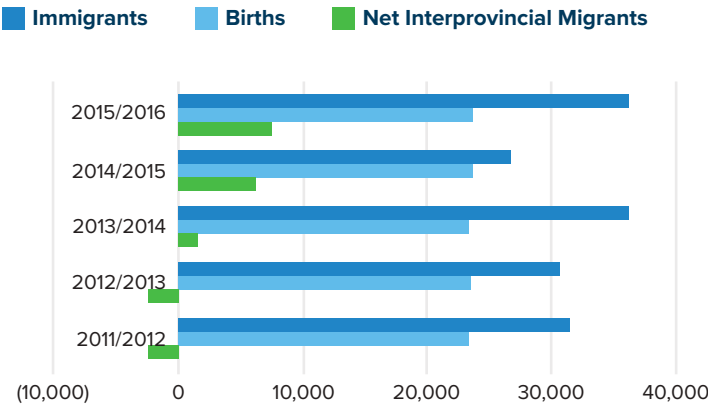
We are young, bold and maturing quickly –
Your presence would help shape our growth and vice versa

A young, smart and highly diverse region

With a population of 2.5 million, Vancouver is projected to grow by 40% by 2040, bringing our total population to 3.5 million. The region's population growth is largely driven by immigration. In fact, Vancouver has the fourth highest percentage of foreign-born residents in the world. With 35,000 global citizens coming to the region every year, immigrants now make up more than 40% of British Columbia's (BC) total population.

And, we are as much young as we are diverse. More and more millennials are choosing call Vancouver home, making them the largest age group in the region today. This provides Vancouver-based companies with a young, talented, diverse labor pool, with strong connections to the global marketplace. Cool eh?

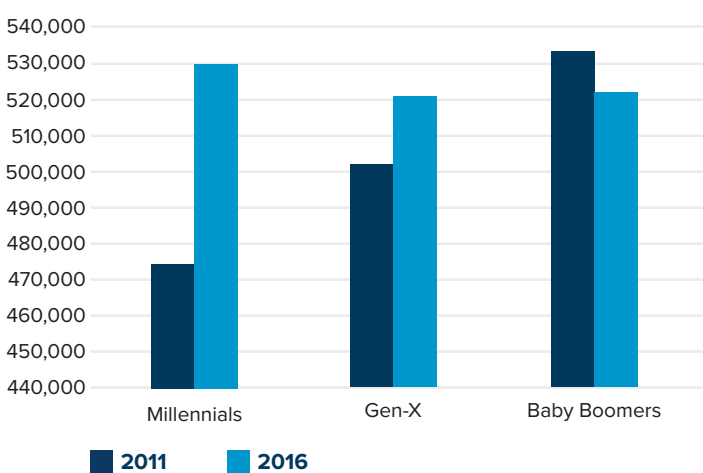
Components of Vancouver's Population Growth
2011 - 2016



Source: Statistics Canada 2017

Approximately 35,000 global citizens immigrate to the region every year; today, immigrants make up more than 40% of BC's total population

Vancouver Age Group Comparison
2011 and 2016



Source: Census 2016

Millennials now account for 21.5% of the total population, making them the largest age group in Metro Vancouver

Canada's fastest growing and most diverse metropolitan economy

Vancouver's economic strategy has been simple: Take the steps needed to build a resilient economy, one that can withstand the boom-and-bust cycles that are amplified when economies hang their success on a small handful of industries.

That has meant diversifying and focusing on knowledge-based sectors, such as technology, digital entertainment and interactive and the green economy. These efforts have paid off, as our economy is now the fastest growing and most diverse in Canada.¹

Significant opportunities for further growth and development

With nearly a million more people expected to call Vancouver home in the next two decades, the region has developed a growth strategy focused on maintaining a compact urban area. This reflects the recognition that sprawling urban development necessitates costly and inefficient urban infrastructure, consumes the natural landscape and adds to the global problems of greenhouse gases, limited resources and climate change.

Amazon's role in not only defining the urban center but collaborating with Vancouver to develop a blueprint for the future across areas such as modern infrastructure, sustainable transportation, technology education and affordable housing will be pivotal.

¹ Conference Board of Canada 2017

#1

Forecasted Future Economic Growth in Canada

Conference Board of Canada 2017

#1

Head Office Growth in Canada

Financial Post FP500 2004 - 2014

#2

Most Tax Competitive City in the World

KPMG 2016



We are ambitious, creative and technology-savvy – We are a lot like you and have great skills to share



A long history of pioneering technological innovation

Companies in the region have introduced the world’s first cellular radio, developed the technology that powered the first broadband internet network, and commercialized the world’s first quantum computer and the fastest growing business app of all time. We understand the balance of taking calculated risks while being bold to create, disrupt and reshape the world in which we live, work and play.



World-class creative and digital entertainment sector

VFX for the world’s top-grossing films (such as Star Wars) are created in Vancouver, and the world’s #1-selling video games (including FIFA soccer) are developed and produced in Vancouver. We are a hub for diverse, innovative and vibrant talent that makes us the world’s #1 VFX & Animation center and the third largest film and television production center in North America.



The fastest-growing technology sector in Canada

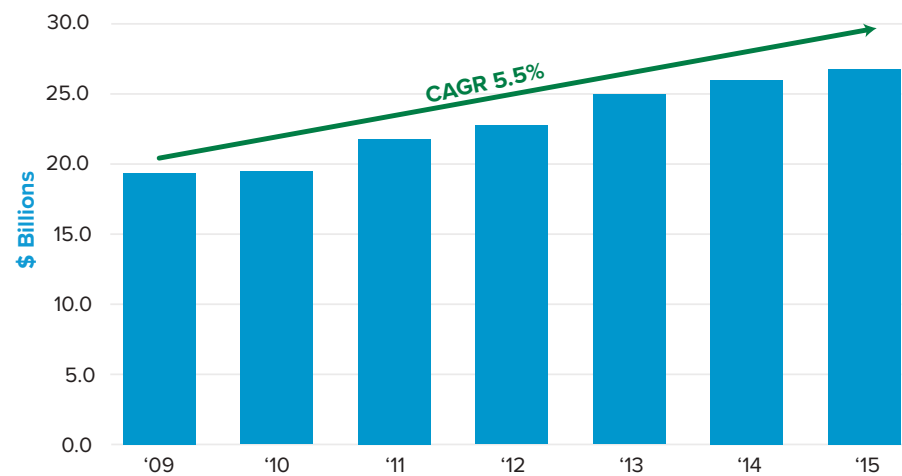
BC leads Canada in technology-sector GDP growth and job creation and boasts Canada’s #1 startup ecosystem, three of five Canadian billion-dollar startups, and two of Canada’s top three universities in software development.

A digital technology supercluster is growing in BC... join us!

The BC tech community is building a digital technology supercluster that will leverage cutting-edge data collection, analytics and visualization platform technologies to transform traditional industries into new business models in the emerging economy. These technologies include AI, machine learning, cloud and IoT.

By leveraging our assets and expanding the digital technology supercluster, BC will continue to be a leader by driving the global transition to a digital future.

Growth in BC Technology Sector Revenues
2009 - 2015



Source: BC Stats 2016



Some consider us (quite) attractive – and it’s not just our physical beauty

The most desired destination to live in North America

Majestic mountains, sparkling ocean, unlimited outdoor activities and infrastructure enabling residents to both live and work in an urban center are just a few reasons Vancouver is consistently ranked as the most livable city in North America.¹

Global companies are increasingly attracted to Vancouver

Unparalleled technology talent, geographic advantages and among the lowest operating costs and taxes of major North American cities. These reasons among many others have driven a strong roster of the world’s leading tech companies — including Microsoft, Boeing (analytics lab), Cisco, Electronic Arts, GE, Intel, and SAP — as well as homegrown successes like Slack, Hootsuite, Avigilon, Bardel, D-Wave, Lululemon Athletica and Vision Critical to call Vancouver home.

“Vancouver has a thriving ecosystem of startups as well as larger companies with smaller presence. More tech companies committed to this thriving region is good for the entire ecosystem, as there is an abundance of talent, infrastructure and resources in the Vancouver area.”

Jesse Calderon, Senior Director of Engineering

¹ Economist Intelligence Unit 2017

You might think of us as a home away from home

You need smart space, strong talent and support to grow sustainably and we've got just that

Proximity to your Seattle headquarters provides strategic advantages

Seattle and Vancouver are in the same time zone and located only 140 flight miles apart; that's 2,300 flight miles closer than New York. Not only does proximity provide strategic advantages in terms of collaboration and information flow, but there are also financial and environmental benefits that come with operating 45 minutes apart – a clear benefit for any organization aiming for a triple bottom-line.

90,000

Hours Less Travel
Compared with
Flying to New York

5,400

Tons Reduction in
CO2e Compared with
Flying to New York

PST

Time Zone Allows for
Business as Usual with
Amazon's Seattle HQ

A strong and stable business climate that is open for business, investment and trade

Canada benefits from a sound, efficient financial system supported by low taxes and business costs and a government investing in the innovative, clean, inclusive economy of tomorrow.

- ▶ **#1 in the G7 and G20 for doing business** over the 2017-2021 period, Economic Intelligence Unit
- ▶ **13 Free Trade Agreements** covering 44 countries and counting (including India and exploratory discussions with China)
- ▶ With the addition of Canada-EU Comprehensive Economic Trade Agreement, guaranteed preferential access to **1.2 billion consumers** and USD \$41 trillion combined GDP

#1

Business
Environment of the
G7 Countries

Economic Intelligence
Unit 2017

#1

Legatum
Prosperity Index

Legatum Institute 2016

#1

Large North
American City of
the Future

FDI Intelligence 2017



Intrigued?

Let's share some details on your next home.



We don't just offer jobs, we offer a life

Vancouver's DNA is comprised of similar cultures and values as Seattle, providing the perfect foundation for your future growth and expansion



Culturally connected

Seattle and Vancouver are like fraternal twins separated at birth. Both are bustling Pacific Northwest coastal cities with ethnically-diverse, eco-conscious populations that have accepted the bargain of wet winters in exchange for nearby ski slopes, kayaking and glorious summers. With the largest population of US citizens living outside of the US, Vancouver is also the most American of the Canadian cities.

A catalyst of innovation

Beyond their West Coast commonalities, Vancouver and Seattle are both dynamic and culturally vibrant cities that are hubs of innovation. In recent years, they have become a magnet to some of the best and brightest in leading economic sectors.

World-class companies including the likes of Slack, Microsoft, Boeing, Tableau and Electronic Arts power regional innovation that has ignited growth in sectors such as software development, cloud computing, space exploration, VFX and video games.

Vancouver has the largest population of US citizens living outside of America, making it the most American non-US city in the world

US Federal Voting Assistance Program 2016



A global hub of Indigenous activity

Metro Vancouver is situated in the territory of 11 First Nations: Hwlitsum, Katzie, Kwantlen, Kwikwetlem, Matsqui, Musqueam, Qayqayt, Semiahoo, Squamish, Tsawwassen and Tsleil-Waututh. The City of Vancouver has declared itself a “City of Reconciliation” – demonstrating a deep understanding that our vision for the future is grounded in appreciation of our past. The region connects closely with these Nations and to newcomers to Canada, leveraging traditional and contemporary knowledge to overcome challenges and build shared prosperity.

“Through the advancement of digital and connected infrastructure in Nations, an increasing number of Indigenous people will be accessing the technology sector and building local digital economies throughout the province. In an era of reconciliation, the First Nations Technology Council is increasingly pleased with the positive relationships we have built with government and industry in BC and look forward to the expansion of tech and innovation on these traditional territories.”

Denise Williams,
BC First Nations Tech Council

Ski, surf and savasana all in one day –
We are the most livable city in North America
attracting the world's top talent



The #1 destination to live and work in North America

Economic and political stability, universal healthcare, diversity in culture and environment, as well as world-class education and infrastructure are just a few of the reasons Vancouver has consistently been ranked as #1 for livability and quality of life across all North American cities.



A spectacular and safe city setting

Majestic mountains, sparkling ocean, rainforests and beautiful foliage throughout all four seasons make Vancouver one of the most beautiful cities in the world. Canadians are known for our friendly nature, and Vancouver’s citizens take great pride in our welcoming, clean, safe streets – day or night, all year round.

Safety of our residents and tourists is a top priority. Vancouver has taken active measures to ensure safety on our streets. As a result, our crime rates are lower than most US cities. For example, homicide and violent crime rates are less than 10% most US cities.¹



From sea to sky

Outdoor enthusiasts love having nature’s playground at their doorstep. Three local mountains, Cypress, Grouse and Seymour, offer access to trails for hiking and biking in summer and first-rate skiing and snowboarding in winter. Whistler – North America’s #1 ski resort – is also located 90 minutes from the downtown core. Within the city, residents and tourists flock to Stanley Park which offers a 13 mile seawall for walking, cycling, running and rollerblading. And if you’re seeking sun and sand, Kitsilano Beach is a popular local destination, boasting the longest swimming pool in North America.

#1
Most Liveable
City in North America
Economist Intelligence Unit 2017

#1
Healthiest
City in North America
Time Magazine 2014

#1
City for Millennials
in North America
Nestpick 2017

“For us, cultural diversity, urban and outdoor life, safety and high quality education are key – and Vancouver offers it all”

Vincent Wauters, General Manager of Arc’teryx

¹ FBI Uniform Crime Report 2015

The best talent is now attracted to the greenest cities

49% increase in
Green Jobs since 2010



World-renowned for green thinking and living

It's no coincidence that globally prominent environmental groups, including the David Suzuki Foundation and Greenpeace, were founded in Vancouver, or that the region introduced North America's first revenue-neutral carbon tax.

Not only is green thinking top of mind for Vancouver's businesses and residents, but green industries (and green jobs) are rapidly expanding. And we don't stop there. Vancouver is aspiring to be the world's greenest city by 2020 and, like Amazon Web Services, going 100% renewable by 2050.

25%
of Canada's cleantech
companies are in the
Vancouver region

KPMG

#3
Greenest City In the World

The Economist



A top-rated food destination

Vancouver has a globally-renowned food and drink scene, with established and on-the-rise chefs, restaurants, food trucks and bars for all tastes. Foodies flock to Vancouver's many local farmers' markets and Granville Island Public Market for its fresh ingredients — local and exotic. Our 75 microbreweries and distilleries, as well as the real ethnic flavor of Vancouver's diverse neighborhoods, ensure we can cater to every unique taste in our vibrant community.



A vibrant scene of arts and culture

Vancouver's festivals and events showcase the region's cultural diversity, arts, community and outdoor activities. Discover Vancouver's diverse neighborhoods at events such as the Dragon Boat Festival, Diwali Fest, TED and TEDx Conferences, and Vancouver Pride Parade. You can also attend the International Jazz Fest to hear world-class musicians. The Celebration of Light fireworks festival draws hundreds of thousands of spectators to Vancouver's beaches and shores, while the Playland and Science World each have lots to keep the whole family busy.

In 2013, the TED Foundation relocated its head office to Vancouver from LA and today the annual TED Talks Conference is held in downtown Vancouver

“One of the world's great cities. Spectacular architecture, vibrant cultural mix, and a glorious natural backdrop of water, parks and mountains”





Vancouver currently has **three times the number of homes for sale under USD \$500,000**, compared to Seattle

Measures are in place to tackle housing affordability concerns

Proactively leading the charge to tackle housing affordability

While the region has many affordable neighborhoods, downtown Vancouver is a highly attractive area and as such, faces high prices and affordability issues. We feel the impacts of global attention and a growing tech sector. But we know we're not alone. The region is committed to learning from others (e.g., Seattle and San Francisco), and is proactively working to ensure housing availability and affordability. Combining this with targeted action from all levels of government has resulted in significant progress in cooling an overheated downtown housing market.

Federal Government

- ▶ Implementing uniform rules for all insured mortgages
- ▶ Closing a tax loophole for non-residents
- ▶ Consulting with mortgage market participants on sharing housing market risks
- ▶ Imposing new restrictions on low-ratio mortgage insurance
- ▶ Issuing new reporting rules for primary residence capital gains exemptions

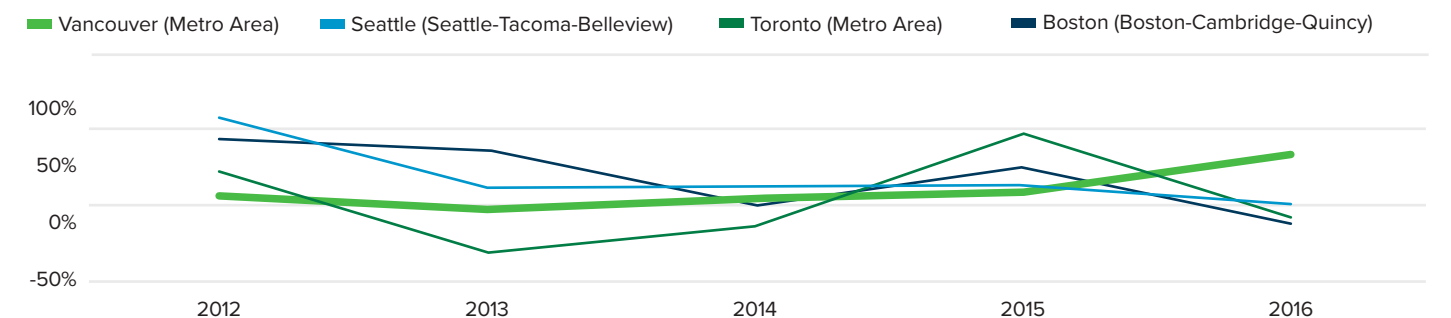
Provincial Government

- ▶ Introduced a 15% Foreign Buyers Tax in 2016
- ▶ Introduced an exemption to the Foreign Buyers Tax for specific foreign workers
- ▶ Included \$500 million for affordable housing in latest budget
- ▶ Increased property transfer tax
- ▶ Increased homeowner grant thresholds for first-time homebuyers

Local Government

- ▶ Developed a housing strategy which applies global learnings to help the region develop as a world-class, livable city
- ▶ Approved the 'affordable housing choices interim rezoning policy'
- ▶ Implemented an empty homes tax on properties not occupied by residents
- ▶ Hired a new Director of Planning with experience from the San Francisco Bay Area

Annual Growth of Housing Starts 2012 - 2016



Source: Conference Board of Canada 2017; US Census Bureau 2017

Note: Due to limitations in the availability of data, Washington DC, New York NY and Atlanta GA were not included

Vancouver's housing supply is increasing

Tackling housing affordability in large part is being addressed through the abundance of new housing starts in the market. The City's annual housing starts have risen by an average of 9% each year between 2012 and 2016, with 2016 seeing a record growth of 34%.

Bringing more affordable homes within reach

The combination of major rapid transit investments (valued at \$7.5 billion), federal, provincial and municipal policies, as well as the influx of supply in the market, has resulted in a greater diversity of affordable housing options across the region. In fact, Vancouver currently has three times the number of homes for sale under USD \$500,000, compared to Seattle.¹

Despite the high prices in the downtown core, we are fortunate to have a wide variety of affordable housing options all within a 25-minute radius of our top sites for Amazon HQ2

2 | We are the best positioned to support your growth

Labor Force





#1

Canada has the
Most Educated
Workforce in the
OECD

Our access to talent is unparalleled

We are a hub for leading global talent in technology and business

Home to world-renowned education institutions

Fundamental to the success of any great business and community is its talent. BC’s world-renowned post-secondary institutions are developing high-quality, industry-ready talent that’s helping our key sectors rapidly expand. The Province’s leading university, the University of British Columbia, is the second highest ranked university in the country and 30th in the world. BC universities have played a pivotal role in launching the academic careers of nine Nobel Prize winners, 69 Rhodes scholars and 65 Olympic medalists. Three Canadian prime ministers have also been educated at UBC, including current Prime Minister Justin Trudeau.

Getting Amazon-ready

Relevant BC Post-Secondary Institutions

- ▶ University of British Columbia (UBC)
- ▶ Simon Fraser University (SFU)
- ▶ University of Victoria (UVic)
- ▶ British Columbia Institute of Technology (BCIT)
- ▶ Brainstation
- ▶ Camosun College
- ▶ Capilano University
- ▶ Centre for Digital Media
- ▶ College of New Caledonia
- ▶ College of the Rockies
- ▶ Douglas College
- ▶ Emily Carr University of Art and Design
- ▶ Justice Institute of British Columbia
- ▶ Kwantlen Polytechnic University
- ▶ Langara College
- ▶ Lighthouse Labs
- ▶ Lost Boys Studios
- ▶ Nicola Valley Institute of Technology
- ▶ North Island College
- ▶ Northern Lights College
- ▶ Northwest Community College
- ▶ Okanagan College
- ▶ Red Academy
- ▶ Royal Roads University
- ▶ Selkirk College
- ▶ Thompson Rivers University
- ▶ University of Northern British Columbia (UNBC)
- ▶ University of the Fraser Valley
- ▶ Vancouver Community College (VCC)
- ▶ Vancouver Film School
- ▶ Vancouver Island University

Credentials Awarded in STEM 2014-2016

Field of Study	Credentials
Science	11,865
Technology, except engineering technology	1,340
Engineering and engineering technology	10,635
Mathematics and computer sciences	6,155
Total	29,995

Source: BC HEADset; BCIT; UBC 2017

Credentials Awarded in Business, Management, Marketing and Related Support Services 2014-2016

BC Public Post-Secondary Institutions	Credentials
University of British Columbia	3,672
Simon Fraser University	3,291
Royal Roads University	2,509
Thompson Rivers University	2,271
University of Victoria	917
British Columbia Institute of Technology	533
University of Northern British Columbia	476
Total	13,669

Source: Ministry of Advanced Education 2017¹

BC post-secondary institutions are rapidly expanding programs that make graduates “Amazon ready”. Between 2014 and 2016, **30,000 students** graduated from STEM programs and **13,000 students** graduated from Business, Management, Marketing and Related Support Services

¹ Due to unavailability of data for credentials awarded in Business for all 25 BC public post-secondary institutions, graduation figures were only reported for the identified public post-secondary institutions



BC institutions are a hub for world-leading research

Nine Nobel Prize winners are current or former BC university faculty and alumni and more than 25% of all US patents derived from post-secondary research in Canada have come from BC. This research excellence enables BC universities to attract more federal research funding increases than any other province.

Home to two of Canada’s top three universities (UBC and SFU) in software development

UBC, SFU, UVic, and UNBC all rank in the top three of their respective categories. To continue to be national leaders, BC universities have evolved their program mix to meet the needs of the technology sector. Between 2006 and 2015, there was a 57% increase in engineering and computer science program spaces. Across the province, co-op placements have increased 40% over four years to 14,000 in 2015/16. In fact, UVic has the largest graduate co-op placement program in Canada.

Mitacs – a federal wage matching program for post-graduates – helped support **2,800 technology-oriented research internships**, trained **7,000 student and post-doc career skills participants**, and supported **470 international research collaborations** in BC

Our institutions demonstrate unprecedented collaboration

- ▶ The Centre for Digital Media, a joint venture of UBC, SFU, BCIT, and Emily Carr University of Art + Design, trains graduate students to build agile and effective digital production pipelines and execute projects with industry partners, including Microsoft and EA.
- ▶ The Vancouver Institute for Visual Analytics (VIVA), a joint initiative of BCIT, SFU, and UBC, provides expertise and solutions for visualization applications and connects students with industry partners, such as Boeing, SAP, and Tableau Software. TRIUMF, Canada's national laboratory for particle and nuclear physics, was founded by UVic, SFU and UBC, in collaboration with CERN, and is one of the world’s leading subatomic physics laboratories.
- ▶ UBC and the University of Washington have created the Cascadia Urban Analytics Cooperative, drawing on a \$1 million gift from Microsoft, to use data to help diverse groups within cities solve pressing environmental, social, and economic challenges.

3 of 5

Canadian unicorn founders graduated from BC post-secondary institutions

57%

increase in computer science spaces between 2006 - 2015

25%

of US patents derived from Canadian post-secondary research come from BC

BC universities catalyze new ventures

- ▶ 200 companies have been started through commercialization of research from UBC
- ▶ 75 companies have been spun out of SFU to date
- ▶ The world’s first commercially available quantum computer was developed by D-Wave Systems, an offshoot of UBC
- ▶ Two of Canada’s five unicorns, Hootsuite and Slack, were started by UVic graduates; the other, Avigilon, came from VCC

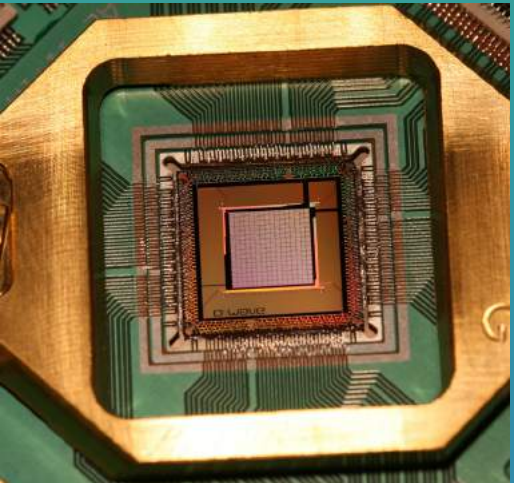
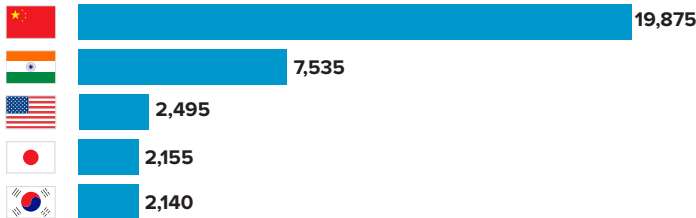


Photo: D-Wave Two, a 512 qubit quantum computer



Top 5 Countries of Origin for International Students

In 2015/16, BC universities recruited the majority of its international students from China and India



Source: Ministry of Advanced Education 2017

Strong ties to Asia support Amazon’s strategic objectives

The largest source market of international students in BC is China, followed by India. The Chinese student population in BC increased by 17% annually between 2010 and 2015. The Asian student population also views Vancouver as a long-term home. 43% of Vancouver residents have Asian heritage, making it the most Asian city outside of Asia. Vancouver’s strong Asian ties are critical as Amazon continues to deepen its business throughout this region and works to ensure its talent can support growth in these key markets.

Vancouver’s student population brings diverse global perspectives and skills

With over 141,000 international students currently studying in the province, BC is a leader in the country with respect to attracting students from all over the world. In 2014, BC had the highest share (14%) of international students as a proportion of total college and university students when compared to Ontario (11%), Alberta (8%), and Quebec (8%). UBC was also ranked as North America’s most international university with over 14,000 international students from 162 countries in 2016.

UBC International Student Enrollment Percentage

2016/17 Academic Year

Source: Office of the VP Research & Innovation, UBC

53%

Master of Science
in Computer Science

47%

Doctor of Philosophy
in Computer Science

27%

Bachelor of Science
in Computer Science

Education that’s shaping the leaders of tomorrow

Technology is shaping modern life more than ever before and Vancouver aims to be at the forefront of cities embracing this change. To prepare ourselves for this reality, the Province is taking proactive measures to ensure our future movers and shakers of economic activity are equipped with the necessary skills. For example, coding is included as part of the curriculum in BC for all students in kindergarten through grade 12.

“Vancouver is a first class creative city... It’s an immigrant city, people who want to migrate, risk-taking, open-minded, self-expressive. Large creative class, highly educated human capital”

Richard Florida, Author of ‘The Creative Class’ series of books



#1

VFX & Animation
Cluster in the World

Variety Magazine

#3

Largest Film
Production Center in
North America

Vancouver Film & Media Centre

6/10

Largest Global Tech
Companies Operate
in BC

Based on Market Cap

A leader in attracting and growing high-caliber tech talent

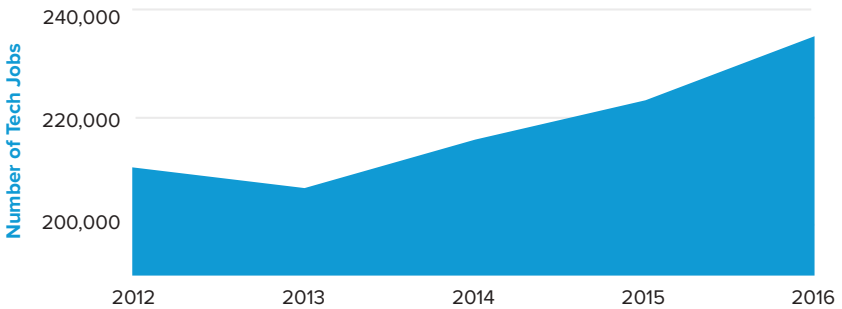
With more than 150,000 tech workers across all industry sectors, BC has the fastest growing tech workforce in Canada. BC’s tech employment growth rate was more than one-and-a-half times the Canadian average. This rapid growth has resulted in BC’s tech-sector employment representing a 30% higher share of the provincial economy compared to other provinces.

Vancouver’s talent has attracted leading digital and creative companies

The technology sector in BC has grown over 90% in the past 15 years, and its over 9,500 companies support 240,000 jobs across the region.¹ BC has become a preferred destination for major tech companies from around the world.

Today, six of the top 10 global tech companies by market cap (i.e., Microsoft, Amazon, Facebook, IBM, Oracle Microsystems and SAP) have a physical presence in BC. Vancouver is also home to digital entertainment giants Sony Picture Imageworks, Industrial Light and Magic, Netflix Productions, Bandai Namco, Nintendo, and Double Negative. BC is also home to large multinational companies such as GE, Cisco, McKesson, Intel, and Samsung.

**Tech Sector Employment in British Columbia
2012 - 2016**



Note: BC’s total employment consists of 150,000 tech workers across all industry sectors based on National Occupational Classification 2016 definitions. BC’s tech sector, based on North American Industry Classification System 2017 definitions, supports 240,000 workers.

Source: Statistics Canada 2017

We have a clear path to 50,000 employees

Local post-secondary institutions are dramatically increasing graduates

BC is undertaking province-wide efforts to actively increase the number of post-secondary graduates across multiple, high-demand disciplines. Over 10,000 credentials were awarded in Science, Technology, Engineering and Mathematics disciplines (STEM) at BC public post-secondary institutions in 2015/16 alone.

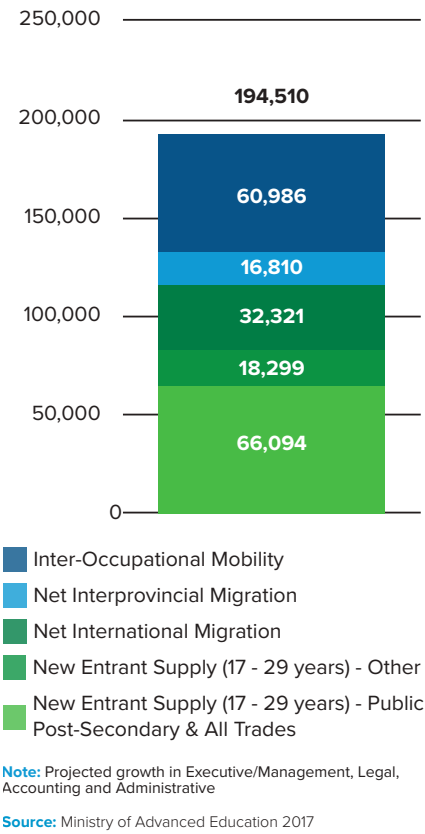
The Province is also focused on offering wider and earlier availability of learning and development programs, including coding curriculum in elementary schools and increasing the number of post-secondary grads by 1,000 every year, for the next five years. In the shorter term, BC is working with federal immigration officials to increase the number of foreign skilled workers by identifying high-growth BC tech companies and providing support to help expedite the process.

BC is dramatically expanding beyond the technology sector

Within ten years, 195,000 jobs will be available in Executive/Management, Legal, Accounting and Administrative roles across the region.

Between 2014 and 2016, BC post-secondary institutions graduated **30,000 students** from STEM programs and **13,000 students** graduated from Business, Management, Marketing and Related Support Services

Non-Tech Employment Growth in BC 2017 - 2027

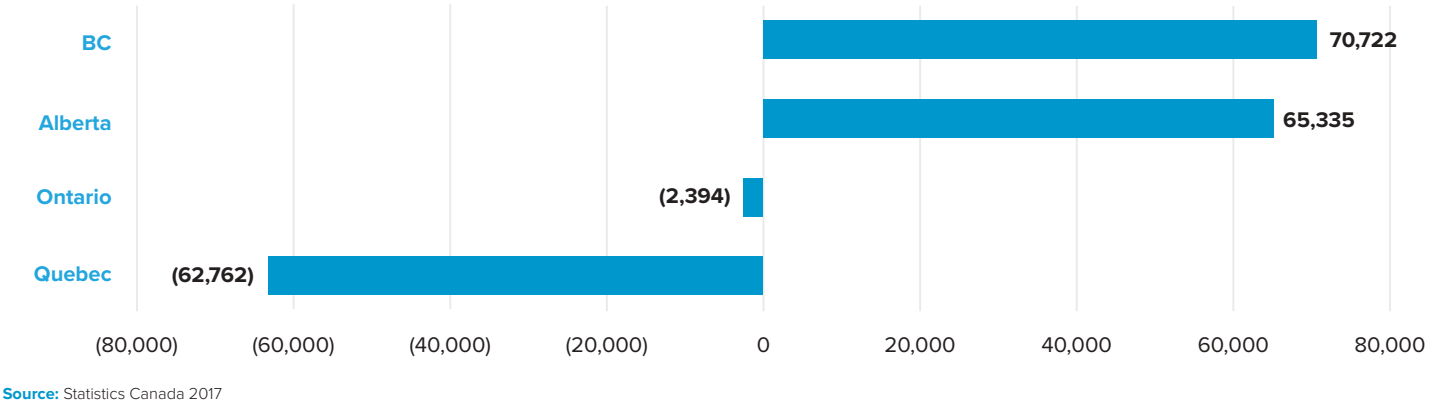


A net attractor of talent from other provinces

BC has the highest number of net interprovincial migrants in Canada. BC's number of interprovincial migrants between 2012 and 2017 totaled 70,722, outpacing Alberta (65,335), Ontario (-2,394), and Quebec (-62,762). Most notably among BC's interprovincial migrants, is the proportion of millennials; approximately 40% of this group is within the 18 to 44 age range. Young talent brings new, in-demand skills and diverse perspectives which are critical to the development of Amazon's growing footprint.

Net Interprovincial Migration

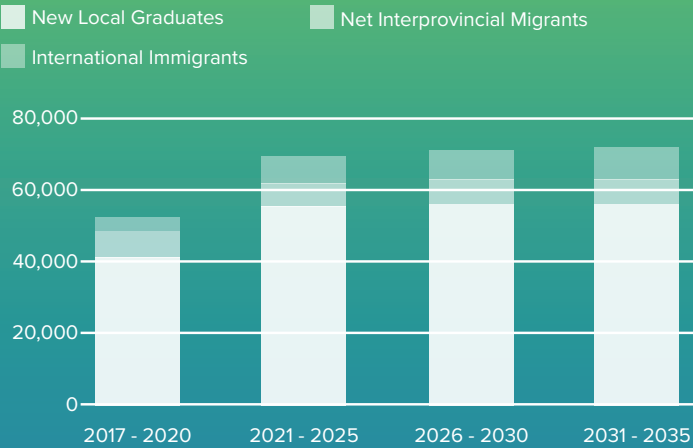
2012 - 2016



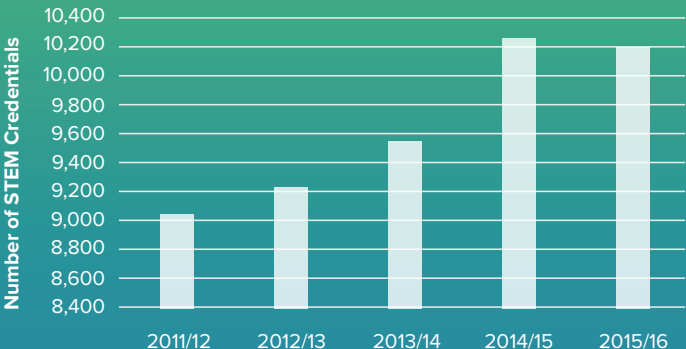
“The talent that you’ll find in 3D development across video games, special effects and animation in British Columbia is ideal for the growing VR/MR industry...there’s an opportunity for Vancouver to establish itself as a global leader in this sector”

Edoardo De Martin, Director of Microsoft Vancouver

Amazon's Tech Talent Pipeline
New Entrants to BC Tech Labor Force



STEM Credentials Awarded in BC Public Post-Secondary Institutions





A magnet for global professionals

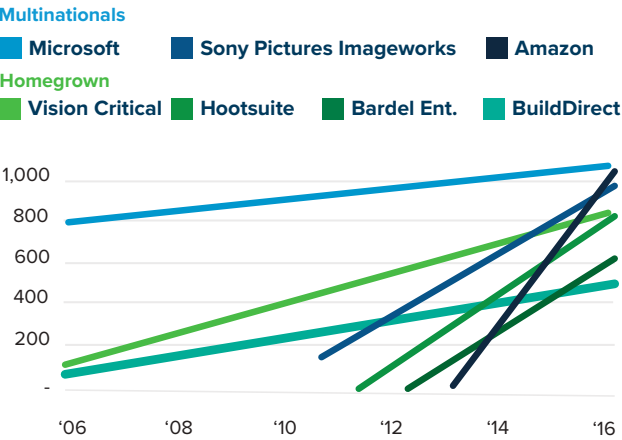
Vancouver’s bustling and vibrant tech ecosystem – home to thousands of homegrown startups and global technology companies – has captured the attention of tech talent from all over the world. Couple that with Vancouver’s widespread reputation and recognition as one of the world’s most livable and diverse cities, it’s no wonder that talent consistently views Vancouver as an unparalleled place to transform their career.

Fast-track immigration policies make Vancouver a top choice for professionals and international entrepreneurs

Each year, over 35,000 global citizens are drawn to the province of BC to apply their skills and help grow the economy. Several government programs are in place to expedite this substantial inflow of immigrants:

- **Global Skills Strategy:** High-skilled workers coming to Canada can benefit from two-week processing of applications for work permits and, when necessary, temporary resident visas. Open work permits for spouses and study permits for dependents are also processed in two weeks.
- **BC Government’s Provincial Nominee Program:** BC can fast-track nominations for permanent residence and also offer work permit support letters while awaiting permanent residency application processing. BC can also facilitate access to the Canadian Government’s Visa and Work Permits process when recruiting temporary or permanent foreign workers.
- **The Startup Visa Program:** The Startup Visa program provides fast-track Canadian residency for tech investors and entrepreneurs, in as little as two-and-a-half months.
- **Permanent Residency:** Qualified, high-skilled workers from around the globe can apply for permanent residency through the federal government’s Express Entry system, as well as BC’s Provincial Nominee Program (PNP). These two programs alone admitted over 16,000 permanent residents to the province in 2016.

Tech Company Growth in Vancouver
Employee Numbers Over Time 2006 - 2016



Source: Vancouver Economic Commission 2017

Amazon would benefit from the talent in Vancouver’s growing tech cluster

As home to six of the top 10 global tech companies by market cap and numerous digital media giants, there is no shortage of talent in BC. Coupled with Amazon’s competitive salaries and global reputation, this results in an unparalleled value proposition – one which the existing 150,000 tech employees in BC would find hard to turn down.

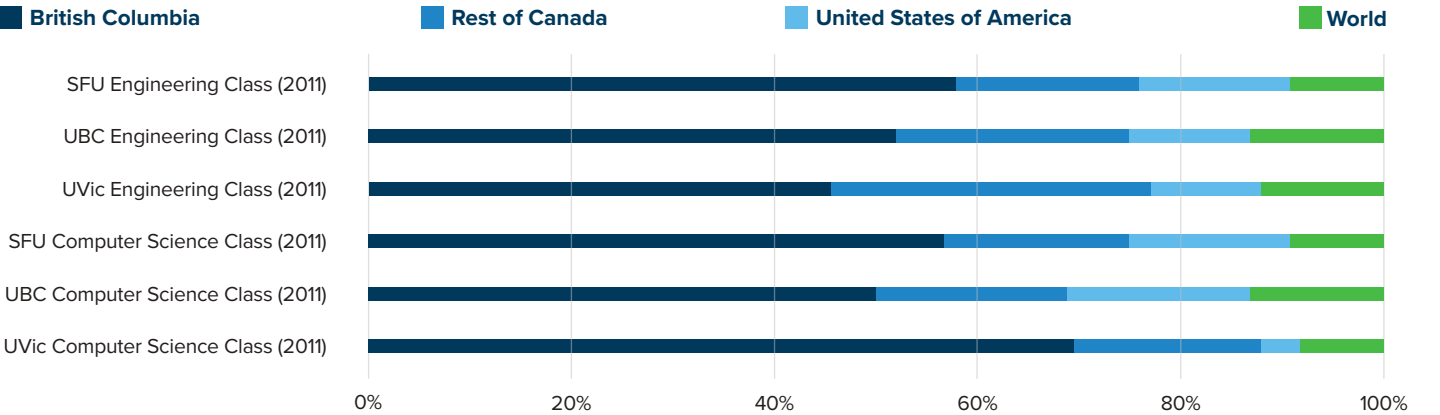
Our talent is here to stay

Favorable immigration policies make BC the best place to call home

Canada’s tech sector has long drawn interest from US technology giants that need foreign talent. Amazon, Facebook, Boeing, and Microsoft all have offices in Vancouver, enabling them to hire foreign workers who can collaborate with colleagues south of the border. BC has made a concerted effort to make it easy for US tech companies to open offices in Canada, providing financial incentives and working with the federal government to expedite visas for skilled foreign workers.

Our talent doesn’t view BC as a short-term experience, but rather a home where they can grow their careers and build a future

Where BC Grads End Up Working
BC Grads Choose to Build a Future Here



Source: ICTC LinkedIn Query 2016

3 | We are move in ready

Sites | Time to Operations | Logistics



We are equipped to grow with you

Vancouver has a host of unique spaces ready to call home

Our two major metropolitan cores (Sites 1 and 2) are open for business on day one, with ample move-in space for Amazon for Phase 1 and expandable space for Phases 2 and 3. Additional land is also available for Phases 2 and 3 in Sites 3 and 4.

Site 1 "Downtown Digs"

An urban center surrounded by mountains and water, this location takes advantage of the very best Vancouver has to offer in terms of sites, scenery, luxurious living, sports, shopping and entertainment.

Phase 1 | Phase 2 | Phase 3

Site 3 "Cultural Core"

A hip and cultural location, with the form and function of an accessible downtown development, yet opportunities to shape it as you like. Strategically located close to downtown, yet with the benefits of a local neighborhood feel.

Phase 2 | Phase 3

Site 2 "Expansive Experience"

Situated in one of the fastest growing cities in the region, this site offers a wide availability of innovative and functional space, amenities mimicking a modern business district, and affordable residential options in the nearby vicinity.

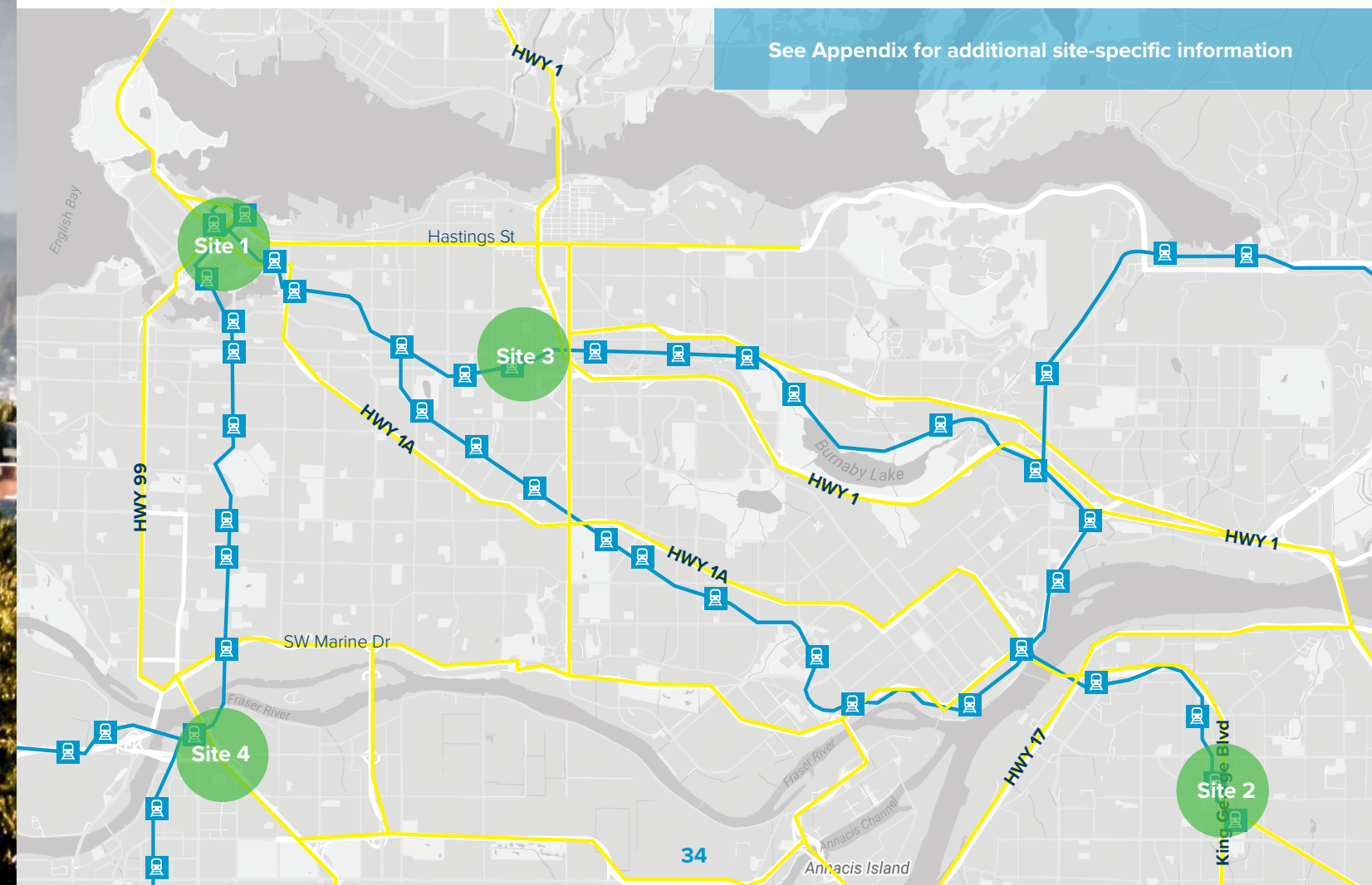
Phase 1 | Phase 2 | Phase 3

Site 4 "Riverside Rendezvous"

A riverfront site with a city center feel and quick, easy, five-minute access, to North America's #1 airport. A community booming with high performance sports and recreational facilities and a vibrant cultural scene.

Phase 2 | Phase 3

See Appendix for additional site-specific information



SITE 01 Downtown Digs

Location: City of Vancouver Neighborhood: Downtown
Status: Existing, Under Construction and Proposed



Site Overview

Situated in the heart of the downtown core, choose this site if you want the energy, excitement and experience of Vancouver's main urban centre. Comprised of existing and proposed office towers, this site is Phase 1 move-in ready and located in the vicinity of the most thriving businesses and tech companies in the region. Furthermore, the site offers a wide array of luxurious living options and is accessible by the many modes of transportation offered through our city's commitment to green living.

Surrounded by mountains and water, this location takes advantage of the very best Vancouver has to offer in terms of sites, scenery, sports, shopping and entertainment.

WALK SCORE 96 BIKE SCORE 92 TRANSIT SCORE 98



Site Info

2,260,000 Phase 1 Square Footage	Core Site Type
4,220,000 Phase 2+ Square Footage	\$40-44 psf Gross Occupancy Costs on average for A+ Space (USD)

Ease of Access

	Walk	Bike	Bus	Skytrain	Drive
Urban Center	✓	✓	✓	✓	✓
Airport (YVR)	--	58 min	50 min	28 min	30 min

Note: Highway #1 is accessible by car in 15 min

Unique Selling Points / Sustainability Features

- Greenest building code in N. America, many LEED Platinum buildings and district energy connectivity
- Area is accessible by all modes of transit, including train, seaplane and helicopter
- Epicenter of business in Vancouver and home to numerous head offices and high tech companies

SITE 02 Expansive Experience

Location: City of Surrey Neighborhood: City Center
Status: Existing and Approved for Construction



WALK SCORE 83 BIKE SCORE 82 TRANSIT SCORE 82

Site Overview

If you want fresh air, expansive space and tons of breathing room without giving up the amenities of the city, choose this location. This site is an award-winning, multi-phased development that integrates several office towers, high-density residential, retail and institutional properties.

Over \$2.3 billion has been invested in this neighborhood since 2000. Surrey is an integrated community with continuously expanding rapid transit, a thriving University District and home to a fast-growing number of young professionals attracted by the large number of affordable residential options in the nearby vicinity.

Site Info

860,000 Phase 1 Square Footage	Campus Site Type
8,000,000 Phase 2+ Square Footage	\$26-34 psf Gross Occupancy Costs on average for A+ Space (USD)

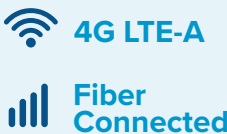
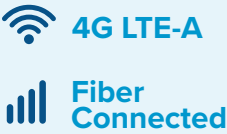
Ease of Access

	Walk	Bike	Bus	Skytrain	Drive
Urban Center	--	--	80 min	44 min	30 min
Airport (YVR)	--	--	--	75 min	40 min

Note: Highway #1 is accessible by car in 10 min

Unique Selling Points / Sustainability Features

- The area benefits from its central location in the Lower Mainland, ease of accessibility by car, bus and Skytrain, as well as being well-positioned to benefit from future infrastructure investments in the area
- With sizable land available, Surrey City Centre has the potential to facilitate a campus-like development



SITE 03 Cultural Core

Location: City of Vancouver Neighborhood: Broadway Tech Status: Assembly and Redevelopment Required



Site Overview

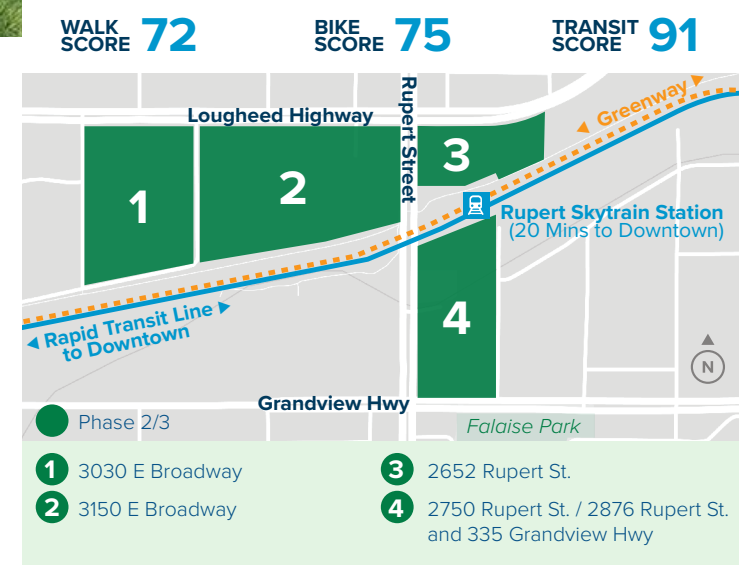
If you want a hip and new-wave-trendy neighborhood at your doorstep, choose this site. “East Vancouver” is where the young and ambitious come to live, work and play. This site is located at the second-largest transit hub in the region and within an amenity-dense neighborhood.

This location provides the form and function of a downtown development, with opportunities for further growth and expansion. With its ease of accessibility and desirable location, companies opt for this area if seeking a neighborhood feel rich with culture.

Site Info

n/a <i>Phase 1 Square Footage</i>	Campus <i>Site Type</i>
7,900,000 <i>Phase 2+ Square Footage</i>	\$32-38 psf <i>Gross Occupancy Costs on average for A+ Space (USD)</i>

- Unique Selling Points / Sustainability Features
- » Broadway Tech Centre is a Sustainability Award-winning Gold and Platinum LEED development
 - » The development is well served by mass transit, bus service, major roadways and the Greenway biking route that follows the Skytrain path



Ease of Access

	Walk	Bike	Bus	Skytrain	Drive
Urban Center	--	45 min	30 min	15 min	15 min
Airport (YVR)	--	--	--	45 min	30 min

Note: Highway #1 is accessible by car in a little over 5 min



SITE 04 Riverside Rendezvous

Location: City of Richmond Neighborhood: Bridgeport Status: In Planning



Site Overview

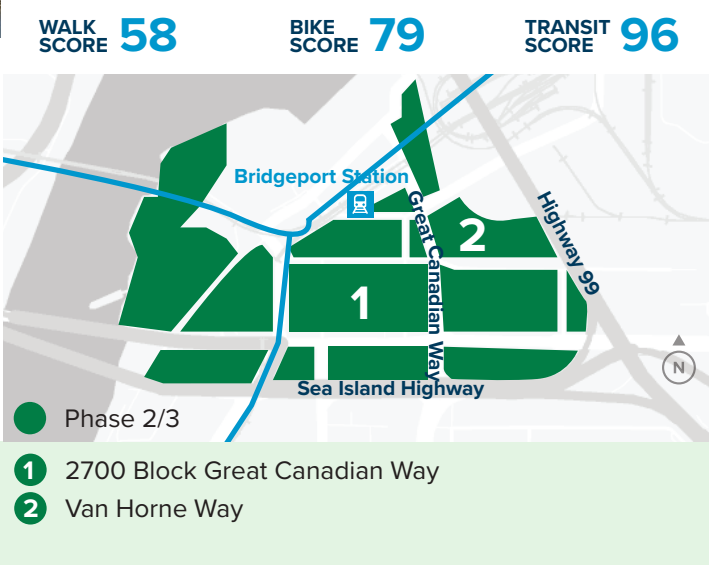
Choose this riverfront site if you want a city center feel, while having quick, easy, five-minute access to North America’s #1 airport. This site is also served by a range of community amenities, including an extensive public riverfront area along the Fraser River, and the Richmond Olympic Oval – a popular venue from the 2010 Winter Olympic Games and now a high performance sports and community facility. These elements have all culminated into a proposition for Richmond City Center as a place to live, work and play.

This site is located on the Canada Line corridor at Bridgeport Station with Park and Ride facilities nearby and close proximity to the River Rock Casino complex.

Site Info

n/a <i>Phase 1 Square Footage</i>	Campus <i>Site Type</i>
7,500,000 <i>Phase 2+ Square Footage</i>	\$128-160 psf <i>Average Commercial Land Values in North Richmond (USD)</i>

- Unique Selling Points / Sustainability Features
- » Within an urban center undergoing major mixed-use redevelopment and densification
 - » Accessible to YVR (5 minutes) and Vancouver City Centre (15 minutes)



Ease of Access

	Walk	Bike	Bus	Skytrain	Drive
Urban Center	30 min	12 min	10 min	5 min	5 min
Airport (YVR)	--	--	15 min	5 min	10 min

Note: Highway #1 is accessible by car in 25 min





Point A to B and traffic free

Whether getting around by train, ferry, seaplane, helicopter, or 860 miles of bike lanes, Vancouver boasts a wide array of unique, traffic-free transit options. All of the sites proposed for HQ2 are accessible by rapid transit.

Moreover, as the #1 bike city in North America and the highest number of cyclists daily—106,000 to be exact—Amazon’s HQ2 employees are as likely to get to work on two wheels as they are on four.¹

Our investments in rapid transit have yielded benefits for drivers as well. Today, Vancouver is among the least-congested of our peer cities in North America,² and continuous improvements in infrastructure and transportation are still being made to ensure traffic congestion is limited.

Communities are digitally connected

Metro Vancouver is on the cutting edge of digital infrastructure, from fiber-optic communications to 5G connectivity.

- ▶ **The world’s next gigabit region.** Most of the region is already able to access gigabit-per-second internet. A \$1 billion investment by Telus will see the downtown core connected by 2019, while an additional \$400 million has been invested to expand fiber-optic connectivity in the cities of Surrey and Burnaby.
- ▶ **There is currently 22,000 miles of fiber-optic capacity in Vancouver,** which also boasts strong links to the Cascadia Innovation Corridor: 800 gigabits of capacity connects Vancouver with Seattle.
- ▶ **At the forefront of 5G innovation.** Vancouver recently witnessed a successful pilot 5G wireless connection distributed over multiple points using the global 3GPP technology standards platform. This ground-breaking event took place in Telus and Huawei’s 5G Living Lab in downtown Vancouver—a one-of-a-kind, real-time laboratory at the forefront of digital innovation.

This pilot represents one of the most advanced connections ever made using technologies that will form the standard for global 5G. It also demonstrates the potential for 5G technology to deliver Wireless-to-the-Premise (WTTx) connectivity at unprecedented speeds—right here in Vancouver.

See Appendix for cellular phone coverage maps.

¹ City of Vancouver 2016
² Vancouver ranks as the 38th most congested city in North America (out of 310 cities), Inrix’s 2016 Traffic Scorecard Report

We will work collaboratively to shape a joint vision for the future

Supporting, enabling and accelerating your growth can be expressed in words, but our actions speak louder. We have a strong history of collaborating with major developers and corporations to help shape the region in ways that benefit all stakeholders – businesses, government and communities – today and in the future.



Centre for Digital Media

A joint venture between four BC universities, the Center for Digital Media offers a world-renowned Masters of Digital Media program, training students to build digital production pipelines and execute projects with industry partners, launching 10 startups in five years.



Hootsuite

To accelerate Hootsuite’s emergence as a digital giant, Vancouver worked in collaboration with the company and other tech organizations to create new bylaw definitions and policy regimes for the Mount Pleasant tech area.



Telus Garden

Vancouver leaders worked with Canadian telecoms giant, Telus, to create an innovative, one million square foot development that comprises a 24-floor office tower, a 53-floor residential tower and a research and development facility in the heart of downtown. Telus Garden is one of the handful of buildings in downtown Vancouver that Amazon already calls home.



Concord Pacific

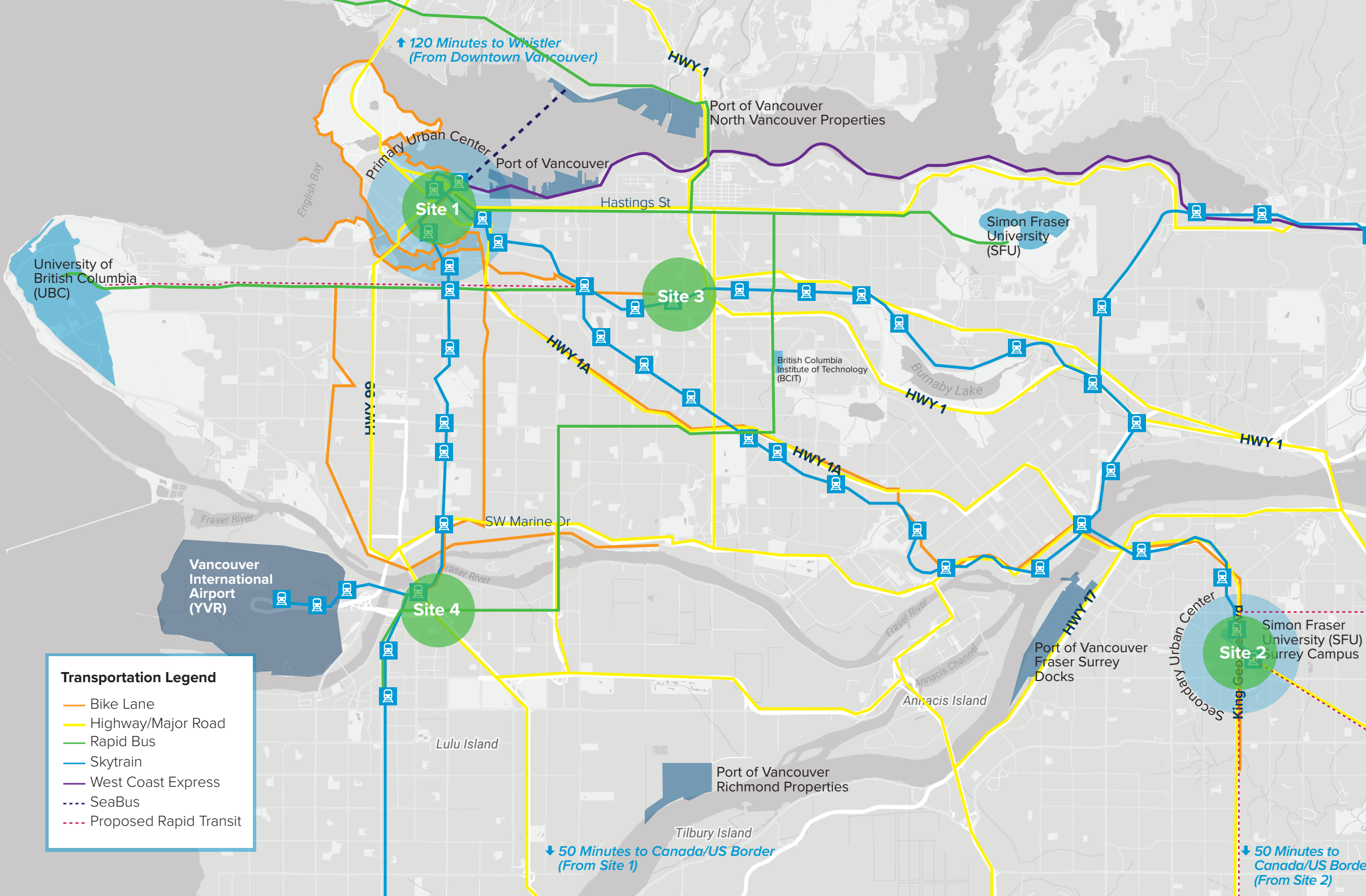
Vancouver and the Government of BC signed a major deal with Concord to redevelop a 204-acre parcel, including 12.2 million square feet of residential and office space, and \$2 billion in capital spending, including schools, parks and other amenities.



Coast Capital Savings and VanCity

VanCity Credit Union partnered with local transit agency TransLink on the creation of an innovative head-office that allowed the regional SkyTrain to run an elevated track within their office tower. Coast Capital Savings developed their headquarters as part of a new transit complex in Surrey, helping to transform the city's downtown.

Vancouver has and will continue to lead with a Day 1 mindset in the future development of the region. Amazon’s presence, innovative thinking and bold ideas will amplify and accelerate how we continue to **operate as a smart, savvy, and sustainable region**



Located in the 'tech timezone'

Vancouver is ideally located in the heart of the new digital economy – the North American West Coast. The region is a key player in the Cascadia Corridor, a 45-minute flight from Amazon's Seattle headquarters, and close to the major hubs of San Francisco and Los Angeles.

Vancouver's time zone allows same-day access to London, New York and Hong Kong, and our airport offers the shortest distances to Asia of any other North American airport. It's also the closest west coast airport to Europe. Proximity streamlines collaboration and improves the flow of information and people between organizations down the west coast and internationally.



Highly-accessible digital districts

The majority of Vancouver's innovation and tech-based businesses are clustered in key districts: the Downtown Core, Gastown, Yaletown, False Creek Flats, Mount Pleasant and Kitsilano/Broadway. The region's compact size and multitude of transportation options, broadly defined by a 25-minute radius, makes getting around easy – a major reason entrepreneurs and career-makers are choosing to call Vancouver home.

Investing in tomorrow's infrastructure

In an effort to enable more connected communities, as well as address housing affordability, numerous transportation projects are underway across the region. As the region continues to expand its reach and pave the way for tomorrow's communities, a strong focus is put on developing infrastructure that enables efficient and effective point-to-point connectivity.

Rapid Transit

A total of \$7.5 billion has been committed to near term rapid transit to increase capacity and support 17 miles of service extension, adding 27 new stops; all providing greater connectivity and accessibility across the region.

Roads and Bridges

Government and major transportation corporations are investing \$1.6 billion in immediate investments for road, bridge, and bikeway construction with the aim of increasing safety, increasing capacity, reducing congestion, and increasing accessibility and connectivity to fast-growing, suburban areas.

Airports

The Vancouver Airport Authority has a \$6 billion upgrade planned for Vancouver International Airport (YVR), which includes a five arm extension of the main terminal.

Ports

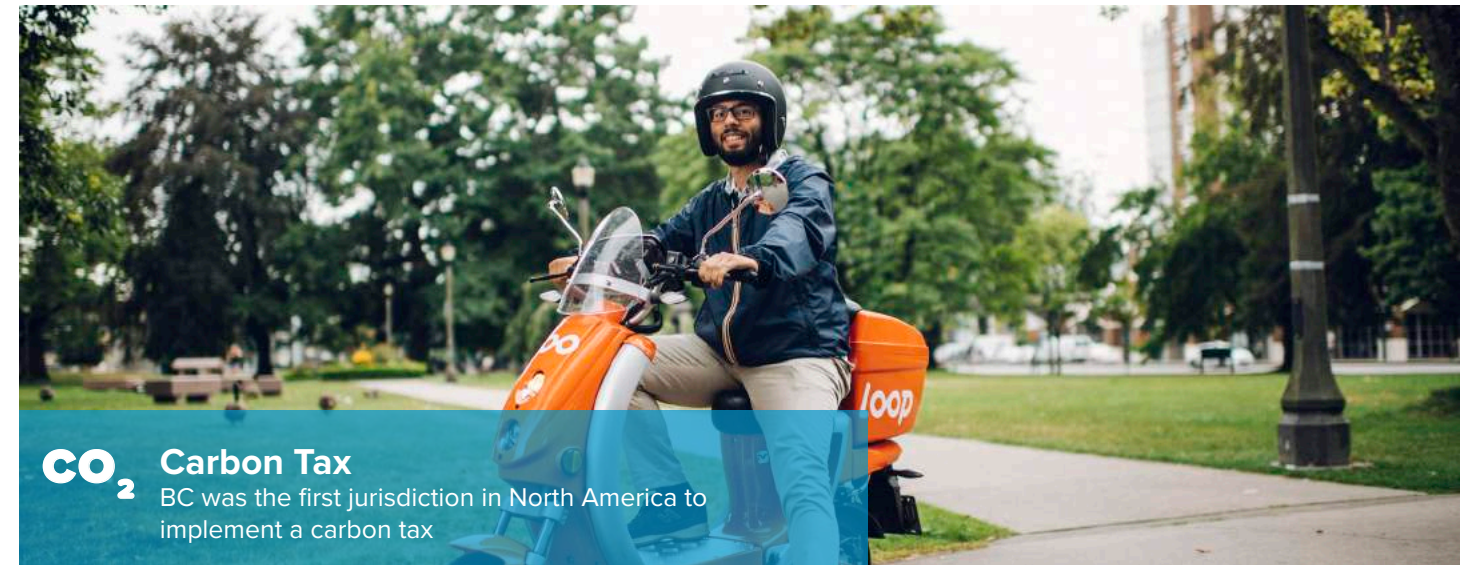
Port capacity expansion projects are underway with the largest being a \$2 billion investment focused on additional container capacity of 2.4 million TEUs, draught of 18 meters, land creation of 115 hectares, terminal length of 1,550 meters, and berth length of 1,300 meters.



“It’s no coincidence that YVR—North America’s best and fastest-growing airport—is located in one of the world’s most livable cities. Vancouver’s incredible lifestyle and diverse economy attracts millions of people to our region every year. This has created a talented local workforce that has shaped Vancouver into one of North America’s emerging tech hubs. We strongly support Metro Vancouver and believe that it would make an outstanding home for Amazon HQ2.”

Craig Richmond, President & CEO, Vancouver Airport Authority

Actively reducing our carbon footprint



CO₂

Carbon Tax

BC was the first jurisdiction in North America to implement a carbon tax

90%

of people & jobs in the city are within walking distance of transit

City of Vancouver

50%

of trips in the city are made by walking, cycling, and transit

City of Vancouver

#1 Biking City

#1 Most Walkable City

#1 Lowest Per Capita GHGs in N. America

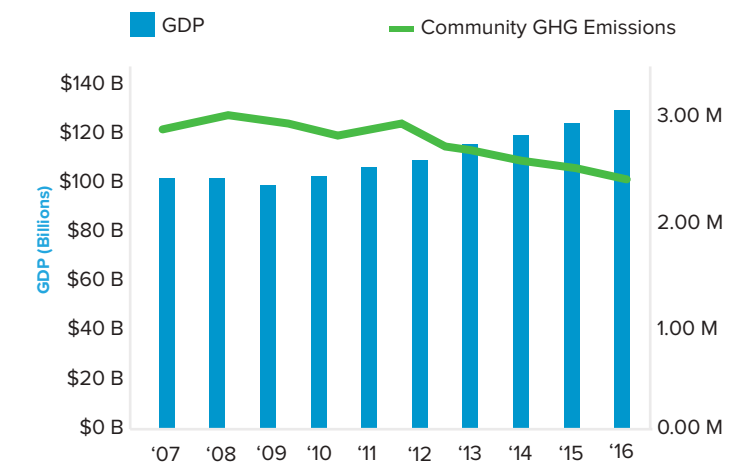
Vancouver has grown its economy by 26% while reducing its GHGs by 15% since 2007

The region’s dedication to green living cannot be ignored; Vancouver boasts 860 miles of bikeways, the largest combined fleet of car and bike shares in North America and first-class rapid transit.

Our multitude of eco-friendly transportation options reflect our commitment to the environment and building a sustainable community. And we don’t stop there. Additional transit investments, valued at \$7.5 billion, have been put in place to ensure we continue to reduce our impact on the environment.

GDP vs Community GHGs

Vancouver is Growing GDP While Reducing Our GHGs



Source: City of Vancouver 2017; Conference Board of Canada 2017

4 | We are the best value option

Capital & Operating Costs | Incentives





We will foster your growth and ensure you stay true to your value proposition

Canada: A clear advantage

The true north strong and free

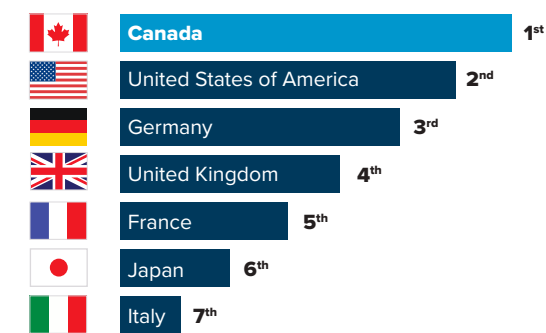
When choosing your next home, you are not only concerned about the existing environment but the long-term strength and stability of where you will choose to grow. And you have a strategic choice to make for the location of HQ2.

Why Canada

Canada has a history of strong GDP growth, employment growth, and overall fiscal performance. A low-inflation environment, high environmental prosperity, a longstanding, stable government and strong social progress has placed Canada at the top of all countries to do business with.

- ▶ **The effective corporate tax rate**, which includes all corporate and labor taxes, is 21% of commercial profit in Canada, **less than half the 44% rate in the US¹**
- ▶ Canadian employers pay on average 25% of payroll in health care costs and benefits, compared to 37% in the US – meaning **savings of up to USD \$600 million a year** for 50,000 employees paid USD \$100,000 each²
- ▶ All Canadian cities over one million population have a cost of living **13% to 15% below** the US baseline, with a **higher quality of life** than nearly all US cities³
- ▶ Canada provides a dedicated service channel for companies looking to make large, job-creating investments in Canada, with a **two-week processing time for 80% of work permit applications**, whereas the US uses a random selection process, or lottery, to select applications yielding a 36% success rate⁴

Business Environment of the G7 Countries Rank for Forecast Period 2017 - 2021



Source: Economist Intelligence Unit 2017


2 Week

processing time for
80% of work permit
applications

53%

lower effective
corporate tax rate
compared to the US

¹ PwC *Paying Taxes* 2017
² KPMG *Competitive Alternatives* 2016
³ Mercer *Quality of Life Survey* 2017
⁴ USCIS; IRCC 2017



To

Jeff Bezos

Cc

Amazon

Subject: Amazon HQ2

Dear Jeff:

There is no better place to do business than Canada. In an increasingly complex and uncertain world, Canadians have embraced change while staying true to their values. Canadians are bold innovators and good neighbors, bound together by a spirit of openness and hard work. Every day we demonstrate that these values are sources of strength, and that better is always possible. I can imagine no better place for Amazon to call its second home.

As the first country in the world to adopt a policy of multiculturalism, we have shown time and time again that a country can be stronger not in spite of its differences, but because of them. Diversity is a fact, but inclusion is a choice. Canada has made its decision and our cities have become windows to the world.

We believe in building a clean-growth economy that is as inclusive as it is innovative. We have embraced technological change, while also helping our citizens adapt to the changing nature of work. That is why we have boosted investment in skills and training and introduced an ambitious Innovation and Skills Plan to make Canada a world-leading centre for innovation.

This plan includes actions that will benefit everyone, from students looking to get work experience to adult workers hoping to improve their skills. It delivers simpler and more efficient support to entrepreneurs, while making it easier for both domestic and global companies to invest in Canada and Canadians. We have simplified our business support programs and designed strategic funds to spur innovation and support high-quality business investments. Our government is a ready and willing partner, with the tools already in place, to make bold and strategic investments to create high-quality jobs.

Canada is also committed to reinforcing our strengths in education. Our world-class colleges and universities have graduated the most highly educated workforce within the OECD. In the new economy, however, we recognize that we must also have access to the best talent in the world, wherever it is. We have therefore introduced dedicated immigration services, allowing companies to attract highly-skilled global talent through an expedited review process to quickly recruit for the skills they need.

Canadian cities are progressive, confident, and natural homes for forward-thinking, global leaders. They are consistently ranked as the best places to live, work, and play in the world. They are welcoming, walkable communities with vibrant arts and culture scenes, connected by ever-improving public transportation networks. Canadians enjoy a universal health care system and a robust public pension plan which help support our excellent quality of life and also mean lower costs for employers. Our cities offer welcoming and predictable business environments, with the lowest overall business costs in the G7, underpinned by the soundest banking and legal systems in the world. They are great places to work, invest, and live — all with unmatched global market access and within a short flight of major American cities.



PRIME MINISTER • PREMIER MINISTRE

Throughout our history, it is in one another that Canada and the United States have found their closest friend and ally. We enjoy the longest, most peaceful, and mutually beneficial relationship of any two countries in the world. Canada is the largest foreign customer for goods and services made in the United States. We are the number one customer of the majority of American states, and among the top three customers of 48 states. Our economic integration and partnership are unparalleled.

As Amazon decides on the location for its second North American headquarters, I am certain that Canada will stand out. With all our advantages and a government that is willing to invest in the future, the business case is simple.

Amazon has already established roots in Canada, creating thousands of good jobs, and taking advantage of leading technologies in areas such as artificial intelligence and drones. We are grateful for the confidence Amazon has placed in our cities and people. We look forward to growing this partnership.

The Government of Canada is committed to working closely with Canadian cities in providing Amazon a second home. The full support of our government stands behind them.

Please accept my warmest regards.

Sincerely,





Reply, Reply to All, or Forward

49

50

Archive

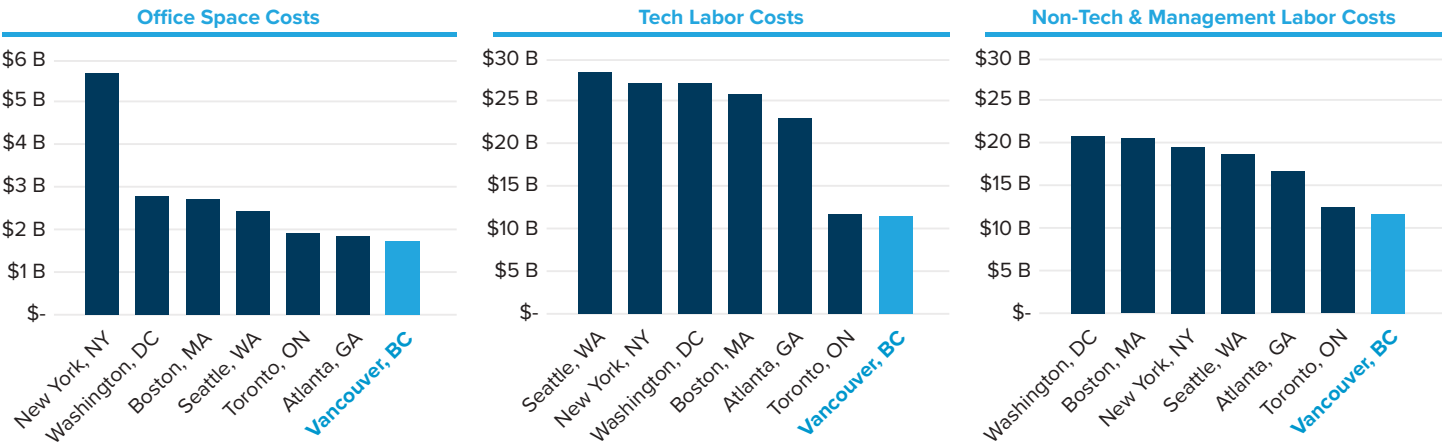
The most sustainable, low-cost advantage for HQ2

A long-term competitive cost advantage

We gathered the data, crunched the numbers, analyzed the results, and crunched the numbers again. There is no denying that Vancouver provides Amazon with the most sustainable, low-cost advantage for HQ2 operating costs now and in the future. Competitive office space, affordable wages for quality talent, and health care savings culminate into an estimated cost savings of up to USD \$34 billion over a 10-year horizon.

Office Space, Labor and Management Costs

In Billions USD; imputed cumulative, undiscounted 10-year costs per 50,000 employees and 7.5 million square feet of office space



Source: CBRE Scoring Tech Talent 2017 Scaled for HQ2

Total Office Space, Labor, and Management Costs

In Billions USD; imputed cumulative, undiscounted 10-year costs per 50,000 employees and 7.5 million square feet of office space

City	Total Cost
New York	\$52,232,486
Washington	\$50,355,097
Boston	\$48,988,387
Seattle	\$49,988,387
Atlanta	\$41,384,891
Toronto	\$25,927,603
Vancouver	\$24,321,348

Compared to a city such as New York, **Vancouver provides a cost savings of USD \$28 billion**

Source: CBRE Scoring Tech Talent 2017 Scaled for HQ2

In addition, health care costs savings over 10 years for 50,000 employees would exceed USD \$6 billion, bringing total savings to USD \$34 billion

Note: Health care cost savings based on 50,000 employees earning USD \$100,000 per year

Source: KPMG Competitive Alternatives 2016

Quality talent at affordable rates

- **Salaries:** Tech salaries are 25% lower in Canada relative to the US, creating a labor cost advantage. Vancouver specifically offers more affordable wages for tech sector workers compared to other major cities (see table below). Industry executives indicate that lower-cost labor does not mean lower-quality labor, which reinforces the value of our local talent.
- **Benefits:** Canadian employers pay on average 25% of payroll in health care costs and benefits, compared to 37% in the US – meaning savings of up to USD \$600 million a year for 50,000 employees paid USD \$100,000 each.¹

See Appendix for additional labor and wage information.

Enabling more impactful investment

Vancouver ranks second of 51 global cities on total tax burden, with a combined federal and provincial corporate income tax rate of 27%. Corporations in Vancouver pay less than half (49%) of the total tax—defined as corporate income taxes, property taxes, capital taxes, sales taxes, miscellaneous local business taxes and statutory labor costs—of US-based firms. A stable, low tax environment means Amazon can focus its investments in areas that will act as catalysts for its future growth.

Top 3 (of 51 cities globally) for lowest tax burden in:

- » Digital Services
- » R&D Services
- » Corporate Services

Source: KPMG 2016

Market	Average Annual Tech Wage Software Engineer (USD)
Vancouver, BC	\$60,107
Toronto, ON	\$62,365
Atlanta, GA	\$92,380
Boston, MA	\$103,979
Washington, DC	\$108,330
New York, NY	\$108,878
Seattle, WA	\$113,906

Source: US Bureau of Labor Statistics 2016; Statistics Canada 2017; CBRE Econometric Advisors, Axiometrics 2017

Exchange Rates

Foreign exchange works in Amazon’s favor.

Having a significant share of Amazon’s operating costs priced in another currency would provide a natural hedge against a rising USD.

Imagine the extent to which Amazon could have benefited from a softening CAD/USD relationship in recent years.

Holding all else equal, had Amazon’s ‘technology and content’ and ‘general and administrative’ expenses been priced in CAD in 2014, 2015 and 2016, the organization would have realized higher pre-tax earnings of USD \$727 million, \$1.9 billion and \$659 million per year, as the Canadian dollar weakened against the USD.



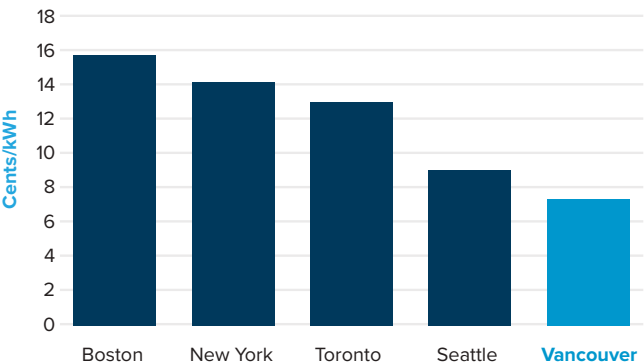
¹ KPMG Competitive Alternatives 2016



A foundation of clean, reliable, affordable energy

- **Clean:** We're proud that 93% of the electricity we generate in BC comes from clean or renewable energy. It's a privilege we don't take lightly.
- **Reliable:** You can count on our standard electricity supply to be extremely reliable, before you consider back up power options.
- **Affordable:** BC Hydro's standard commercial rate is the fifth-lowest in North America, helping you keep operating costs low.¹

Average Electricity Prices for Large-Power Customers
Average Prices Per kWh



Notes:
1. Average prices are for a monthly consumption of 3,060,000 kWh and a power demand of 5,000 kW; rates in effect April 1, 2016
2. Due to limitations in the availability of data, Washington DC, and Atlanta GA, were not included

Source: Hydro Quebec 2016

100%
renewable energy
commitment for 2050

City of Vancouver

¹ Hydro Quebec 2016

Enhancing Vancouver’s potential for HQ2

Government, corporate partners and the community have developed a package of incentives to support the launch of HQ2 in Vancouver

Corporate and political leaders across all levels have come together to develop a package of incentives which presents a significant opportunity for Amazon’s HQ2. While a number of existing federal and provincial incentives are in place to support the launch of Amazon’s new headquarters in Vancouver, the local community has further enhanced these benefits with HQ2-specific offerings (see Appendix for details). **New federal incentives to be discussed after Vancouver is shortlisted.**

New Provincial Incentives - Amazon HQ2

Incentive	Description
s.17(1)	s.17(1)
Amazon-Global Immigration Solution	A dedicated BC Provincial Nominee Program Solution for Amazon, s.17(1)
Cascadia Innovation Corridor	A cross-border initiative aimed at bringing the Vancouver and Seattle regions closer together to increase economic growth and innovation; new initiatives include seaplane routes linking Seattle and Vancouver harbors s.17(1)
s.17(1)	s.17(1)
s.17(1)	s.17(1)
s.17(1)	s.17(1)
Affordable Housing	To address affordability concerns, the Government of BC has committed to building 114,000 affordable units over the next 10 years and forming a housing working group reporting directly to Cabinet
s.17(1)	s.17(1)
s.17(1)	s.17(1)
Sustainable Tall Wood Buildings	The Government of BC will financially support the costs of promoting and leveraging the learnings and best practices from innovative projects to help Amazon HQ2 embrace carbon friendly wood construction

Talent.
Value. Potential.





90%

of Vancouverites are supportive
of HQ2 landing in Vancouver

The feeling is mutual

We want to support your growth and ensure you thrive

Vancouverites want Amazon

Vancouver is ready for its next anchor tenant, and young people need well-paying, competitive career opportunities to thrive in this market. Upon Amazon's announcement to open a second North American headquarters, the community response was astounding, with 90% expressing positive sentiment for HQ2 to be located in Vancouver.¹

Government support is unparalleled

BC's fast-growing tech sector is already home to many American companies and offers unlimited possibilities for technology firms like Amazon. Federal, provincial and municipal governments have all expressed their strong desire and support to bring Amazon to the region and will work as one to ensure a strong, symbiotic relationship. Amazon's presence will play a key role in shaping the economy, the community and the region as a whole.



"We are in this [Amazon HQ2 race] to win it!"

Canadian Prime Minister Justin Trudeau



"I want to ensure that Amazon HQ2 comes to BC."

BC Premier John Horgan



"Amazon's HQ2 would be [a] fantastic addition to Vancouver's world-class innovation ecosystem."

Vancouver Mayor Gregor Robertson



"We are all-in to bring Amazon HQ2 to the region!"

Surrey Mayor Linda Hepner

¹ Based on Daily Hive Vancouver online survey of 1,000+ participants



We provide limitless opportunity

We view this as a relationship

Vancouver has never provided one-off tax incentives for corporations – and that’s a good thing. Instead, our approach focuses on building strong relationships and providing long-term incentives that benefit the whole community and our corporate residents.

There are endless possibilities

Like Amazon, Vancouver is at an exciting point in its growth journey. While we have ideas for what the future may hold for the region, Amazon’s HQ2 will undoubtedly inspire a vision that reinvigorates how we think, work, live and play.

- ▶ **\$7.5 billion in transportation capital spending by 2026.** Amazon has the unique opportunity to leverage these investments, and many others, into serving and amplifying its existing growth patterns.
- ▶ **Projected growth of 1 million residents by 2040.** With advantageous immigration programs, Amazon stands to gain from the growing local talent pool and the positive global brand of Canada, which attracts the best and brightest.
- ▶ **Dovetailing policy arrangements.** Whether it be accelerating the path to 100% renewable energy, or integrating cognitive intelligence and drone technology into our day-to-day lives to drive efficiencies, the region wants the bold ideas of tomorrow, to determine the priorities of today. This is where Amazon is perfectly positioned to inspire and influence.

Catalyzing integration

Vancouver is a vibrant ecosystem in the most diverse economy in Canada. Amazon's ability to efficiently integrate and interact with each aspect of this ecosystem will be a top priority for all policy-makers in the region, and players such as the Vancouver Economic Commission are uniquely positioned to connect Amazon wherever and whenever needed.

We’re proud of what we have to offer as a region
and excited about how Amazon could inspire, influence and grow with Vancouver today, tomorrow and in the years to come

To **Amazon**
Cc **Prime Minister Trudeau**
Subject: RE: Amazon HQ2 Shortlist

It doesn’t end here

Consider this a first draft

What we have outlined is just the beginning. Businesses, the government and communities have all expressed their unwavering desire to support the launch of Amazon’s HQ2 in Vancouver (see Appendix for letters of support from major aviation, transportation and telecommunications players).

There is more that can and will be offered. However, we want to ensure you are involved in every step of that journey. We have a team ready and able to do just that. The foundation of every great relationship starts with communication – so reach out, be curious, keep the dialog going, and let’s make this relationship a great one.

Your Vancouver champions,

- [Ian McKay](#) | CEO at Vancouver Economic Commission
- [John Horgan](#) | Premier of British Columbia
- [Gregor Robertson](#) | Mayor of City of Vancouver
- [Linda Hepner](#) | Mayor of City of Surrey
- [Fazil Mihlar](#) | Deputy Minister at BC Ministry of Jobs, Trade & Technology
- [Sadhu Johnston](#) | City Manager at City of Vancouver
- [Vincent Lalonde](#) | City Manager at City of Surrey

This proposal contains confidential and proprietary information which is submitted in confidence and in reliance on Amazon’s prior agreement to treat HQ2 proposals as confidential and proprietary. It is acknowledged that Amazon will wish to share this proposal with some of its external advisors and consent is granted provided they also acknowledge and agree to treat this proposal as confidential and proprietary.

Appendix





Vancouver: We are home

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Appendix A | Proposal Criteria Mapping

Proposal Criteria Mapping		
Criterion	Proposal Requirements	Reference Page and/or Appendix
Site/Building	» Information regarding potential buildings/sites	34-39
	» Current ownership structure of the property	Appendix B
	» Current zoning of the site	Appendix B
	» Utility infrastructure present at the site	Appendix B
	» Demonstrate multiple cellular phone coverage maps to ensure optimal service	Appendix D
Capital and Operating Costs	» A stable and business-friendly environment and tax structure	Business Environment: 14, 44, 49-50 Tax Structure: 48, 51-52, 54
Incentives	» Incentives offered by the province and local communities to offset initial capital outlay and ongoing operational costs	54 Appendix F
	» A summary of total incentives offered by the state/province and local community, including a brief description of the incentive item, the timing of incentive payment/realization, and a calculation of the incentive amount. Please describe any specific or unique eligibility requirements mandated by each incentive item. With respect to tax credits, please indicate whether credits are refundable, transferable, or may be carried forward for a specific period of time. If the incentive includes free or reduced land costs, include the mechanism and approvals that will be required. Please also include all timelines associated with the approvals of each incentive. We acknowledge a Project of this magnitude may require special incentive legislation in order for the state/province to achieve a competitive incentive proposal. As such, please indicate if any incentives or programs will require legislation or other approval methods. Ideally, your submittal includes a total value of incentives, including the specified benefit time period.	54 Appendix F
	» If any of the programs or incentives described in the summary of total incentives are uncertain or not guaranteed, please explain the factors that contribute to such uncertainty and estimate the approximate level of certainty. Please also describe any applicable claw backs or recapture provisions required for each incentive item.	Appendix F
	» A timetable for incentive approvals at the state/province and local levels, including any legislative approvals that may be required	Appendix F

Proposal Criteria Mapping		
Criterion	Proposal Requirements	Reference Page and/or Appendix
Labor Force	» The Project must be sufficiently close to a significant population center, such that it can fill the 50,000 estimated jobs that will be required over multiple years	5, 41-42, 59
	» A highly educated labor pool is critical and a strong university system is required	22-25
	» Labor and wage rate information in the general job categories described	51-52 Appendix E
	» Relevant labor pool information and Metro Vancouver’s ability to attract talent regionally	26-27
	» Specific opportunities to hire software development engineers and recurring sourcing opportunities for this type of employment	26-30, 54
	» All levels of talent available in the MSA, including executive talent and the ability to recruit talent to the area	22, 27
	» Programs/partnerships currently available and potential creative programs with higher education institutions in the region	23, 54
	» Please also include a list of universities and community colleges with relevant degrees and the number of students graduating with those degrees over the last three years	22
	» Additionally, include information on your local/regional K-12 education programs related to computer science	25
Logistics	» Travel time to a major highway corridor that provides direct access to significant population centers with eligible employment pools and arterial roadway capacity potential	35-38
	» Travel time to an international airport with daily direct flights to Seattle, New York, San Francisco/Bay Area, and Washington, DC	35-38
	» Highway, airport, and related travel and logistics information for all proposed sites	41-42
	» Transit and transportation options for commuting employees living in the region	41-42
	» For each proposed site in Metro Vancouver, identify all transit options, including bike lanes and pedestrian access to the site(s)	35-38
	» The ranking of traffic congestion for your community and/or region during peak commuting times	39
Time to Operations	» An expeditious timetable for the commencement of construction, including requisite access for utilities, infrastructure, and zoning	Appendix B
	» An outline of the permitting process and estimated timetable to initiate Phase I of Amazon’s operations	Appendix C

Proposal Criteria Mapping		
Criterion	Proposal Requirements	Reference Page and/or Appendix
Community Cultural Fit	» The Project requires a compatible cultural and community environment for its long-term success. Please demonstrate characteristics of this in your response.	11-16
	» The presence and support of a diverse population, excellent institutions of higher education, local government structure and elected officials eager and willing to work with the company	5-7, 11, 12, 14, 16, 22-25, 40
	» A stable and consistent business climate	48
	» Testimonials from other large companies	8, 14, 16, 28, 43 Appendix G
Community/ Quality of Life	» The Project requires a significant number of employees. We want to invest in a community where our employees will enjoy living, recreational opportunities, educational opportunities, and an overall high quality of life. Tell us what is unique about your community.	5-7, 11, 12, 14, 16, 22-25, 40
	» Please include information on your community with respect to daily living, recreational opportunities, diversity of housing options, availability of housing near potential sites for HQ2, and pricing, among other information	17-18
	» Please also include relevant crime data and cost of living data	18, 48
	» Please use your response as an opportunity to present any additional items and intangible considerations with respect to your state/province and community that Amazon should include in its analysis	49-50, 58-60



Appendix B | Site Details

Site 01: Downtown Digs	
Timing	Phase 1 (2019)
Timing Details	» No new build expected to be delivered to the market until 2021 » Phase 1 requirements would be met through back fill of existing vacant space and/or sublease opportunities » New space could be completed by Phase 2/3 timing
Ownership Structure	» Ownership to all proposed site properties are on a private ownership structure
Current Zoning	» All site properties in the catchment are either zoned DD Downtown District or in the process of a rezoning application to permit an increased density as permitted under the DD zoning by-law » Under the DD by-law, office uses are an outright approval use
Utility Infrastructure	» All site properties are located within built up urban areas with all normal urban utilities available to or in close proximity to the properties » This includes infrastructure for hydro, central steam, communications, sewer and water
Sustainability Features	» All new development in the local markets are driven by market demand for LEED Gold or Platinum standards, and the City of Vancouver requires all rezoned non-residential buildings to meet LEED Gold standards. As medium-term policy goal, the City of Vancouver is moving to ensure buildings to have no operational GHGs by 2030.

Timetable for Phase 1 Permitting and Zoning	» Development permit and zoning (if required): 12 months » Building permit: 3-4 weeks (will be processed by a Certified Professional in parallel with Development permit application)
---	--

Site 02: Expansive Experience	
Timing	Phase 1, 2 and 3 (2019 - 2027)
Timing Details	» Current projects by late 2019 plus existing buildings
Ownership Structure	» Ownership is based on private entities or a private/ public partnership with the City of Surrey.
Current Zoning	» The sites identified for the Phase 1 development are either zoned for the intended use or within the Comprehensive Development Plan, capable of being rezoned to a non residential use, consistent with the City of Surrey OCP designation for the City Center District.
Utility Infrastructure	» All site properties are located within built up urban areas with all normal urban utilities available to or in close proximity to the properties » This includes infrastructure for hydro, communications, sewer and water, and district heat

Sustainability Features	» All new development in the local markets are driven by market demand for LEED Gold or Platinum standards. City Centre in Surrey includes a District Energy system. The City of Surrey has a robust, sustainability focused energy code, based on the provincial Energy Code, which aims to ensure all buildings reach Passive House standards on variable timelines.
Timetable for Phase 1 Permitting and Zoning	» Zoning: all zoning already in place » Development permit: 6-9 months » Building permit: 3-6 months (could be done concurrently with Development permit)

Site 03: Cultural Core	
Timing	Phase 2 (2020)
Timing Details	» Delivery of Phase 2+ within Broadway Tech Centre in 2020/21 » Any assembly of surrounding lands could take an estimated 2 to 3 years to complete purchases, rezone and obtain Development Permit.
Ownership Structure	» Ownership to all properties are on a private ownership structure

Current Zoning	» A rezoning application would be required for the assembled sites in accordance with the OCP designations to permit any proposed office related uses similar to that contemplated by Amazon.
Utility Infrastructure	» All site properties are located within built up urban areas with all normal urban utilities available to or in close proximity to the properties » This includes infrastructure for hydro, communications, sewer and water
Sustainability Features	» All new development in the local markets are driven by market demand for LEED Gold or Platinum standards. City Centre in Surrey includes a District Energy system. All new comprehensive planned new community oriented development encourages the inclusion of energy and waste systems.
Timetable for Phase 1 Permitting and Zoning	» Not applicable (proposed for Phase 2)

Site 04: Riverside Rendezvous	
Timing	Phase 3 (2027)
Timing Details	» Dependent on Amazon’s demand » Requires assembly of surrounding lands which may take 2 to 3 years
Ownership Structure	» Ownership to all proposed site properties are on a private ownership structure
Current Zoning	» Light Industrial (IL) and Auto-Oriented Commercial (CA)
Utility Infrastructure	» All site properties are located within built up urban areas with all normal urban utilities available to or in close proximity to the properties » This includes infrastructure for hydro, communications, sewer and water
Sustainability Features	» All new development in the local markets are driven by market demand for LEED Gold or Platinum standards. The City of Richmond has a robust, sustainability focused energy code, based on the provincial Energy Code, which aims to ensure all buildings reach Passive House standards on variable timelines.
Timetable for Phase 1 Permitting and Zoning	» Not applicable (proposed for Phase 3)

Appendix C | Permitting Process Outline

Development Permit Process

- 1. **Pre-application**
 - » Check the zoning of the site and any relevant bylaws that may apply
 - » Meet with City Staff to discuss application process
 - » Pay the application fee
- 2. **Review**
 - » The zoning and proposed use of the site is taken into consideration or whether a rezoning application is required.
 - » The planning committee will also consider if the development requires any discretionary increases in regulations or relaxations
 - » Advisory panels and groups meet to discuss the impact of the development
 - » A neighborhood notification process is commenced to solicit feedback from the community
- 3. **Decision**
 - » After all reviews have been completed and all notification responses have been summarized and evaluated, a decision on the application is made.
 - » The decision is usually made by a senior member of the City's planning department with Council involvement only on major applications.
 - » Applications are generally approved, approved with conditions, or refused

Rezoning Process

- 1. **Planning**
 - » The planning department will identify and explain the policies, guidelines, and plans that affect the property's use and development.
 - » The developer will also be advised as to any issues that may need to be considered or addressed during the application process.
- 2. **Written Enquiry**
 - » If the rezoning is deemed to have community or citywide benefit, the developer will be asked to apply for rezoning advice before formal rezoning application occurs
 - » The developer will receive a rezoning application form at this point
- 3. **Pre-application Meeting**
 - » Based on the response to the application for rezoning advice, the developer should then book a pre-application meeting with the rezoning planner to discuss the application requirements for the proposal or any consultation with the community that may be required.
- 4. **Application**
 - » Once all the rezoning material has been compiled, a rezoning application may be filed.
- 5. **Review and Decision**
 - » The public will be informed about the rezoning application with a community meeting being a possibility if required
 - » After letting the public respond, the Planning department will then write a report, which provides a complete analysis of the application, and a recommendation that it either be referred to a public hearing and approved, or refused.

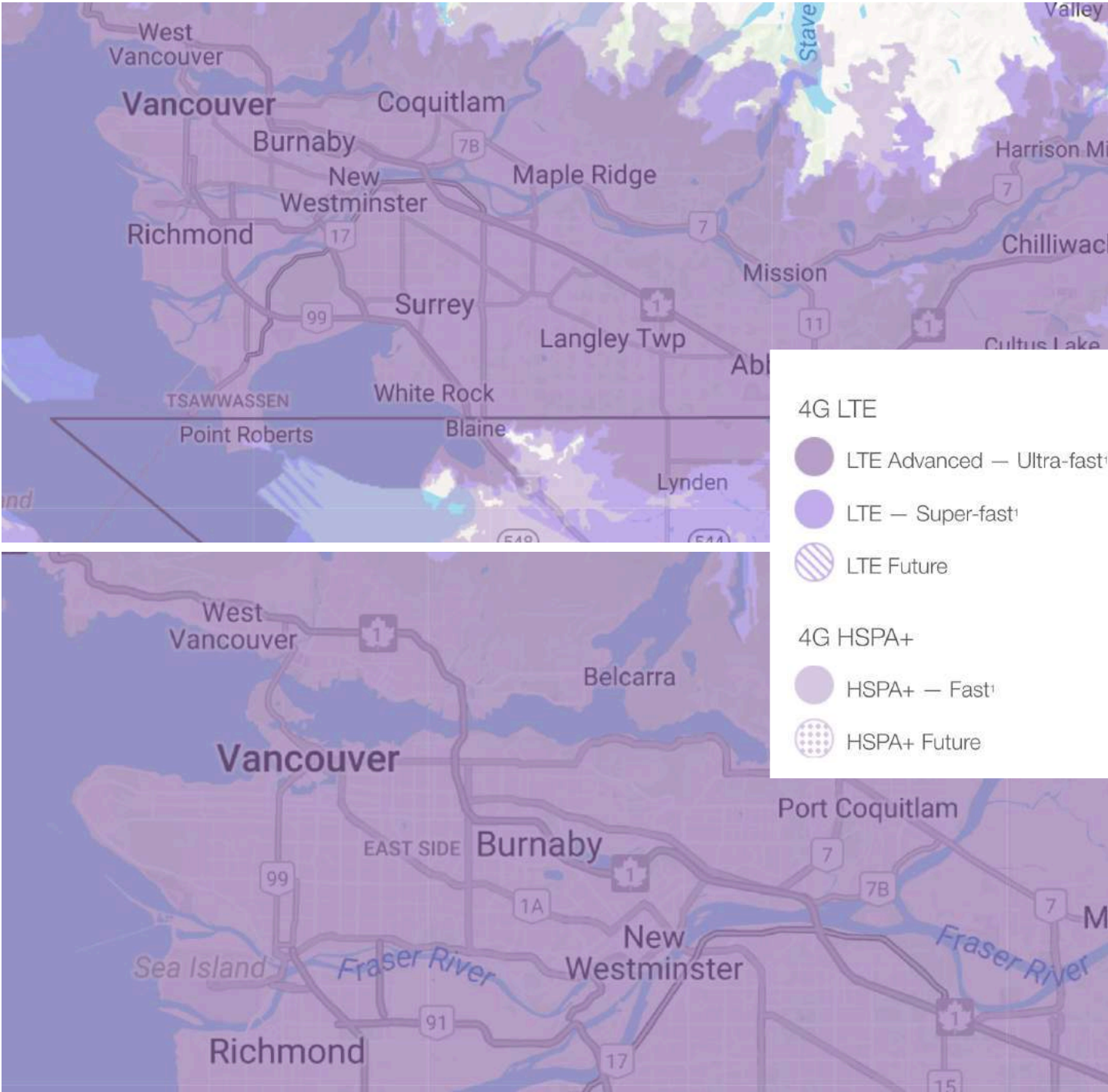
Building Permit Process

- 1. **Documentation Collection**
 - » This step requires the developer to ensure that they have all documentation which may include the building permit application form or an authorization form
 - » A building information sheet or development data sheet is likely to be requested at this step.
- 2. **Drawings Preparation**
 - » These drawings may include architectural, structure and civil drawings
- 3. **Application**
 - » Submit application and associated fees
- 4. **Review and Decision**
 - » The City will review the application to ensure that all legal documents are present
 - » The City will also ensure that all building details will conform with BC Building Code requirements and City zoning requirements
 - » The City will ensure that Building conforms with all City and Provincial health and accessibility requirements



Appendix D | Cellular Phone Coverage Maps

The following maps demonstrate cellular phone coverage across the region which includes LTE Advanced – Ultra Fast



Appendix E | Labor and Wage Information

Labor and wage rate information in the general job categories described

Labor Force Characteristics by Occupational Group 2016				
Occupation	BC Labor Force	Mainland/Southwest Labor Force	Avg. Annual BC Wage Rate (CAD)	Avg. Annual BC Wage Rate (USD)
Executive/Management				
Administrative services managers	14,200	9,300	\$78,220	\$62,580
Managers in financial and business services	11,600	8,300	\$81,760	\$65,410
Managers in engineering, architecture, science and information systems	11,600	8,800	\$95,260	\$76,210
Corporate sales managers	1,500	1,100	-	-
Managers in construction and facility operation and maintenance	42,200	31,000	\$74,280	\$59,420
Engineering with a preference for software development engineers (SDE)				
Computer and information systems professionals	54,600	43,000	\$76,260	\$61,010
Technical occupations in computer and information systems	18,700	14,300	\$66,060	\$52,850
Legal				
Judges, lawyers and Quebec notaries	15,100	11,300	\$90,880	\$72,700
Paraprofessional occupations in legal, social, community and education services	54,700	34,600	\$41,600	\$33,280
Accounting				
Auditors, accountants and investment professionals	61,000	45,900	\$64,760	\$51,810
Finance, insurance and related business administrative occupations	31,500	17,800	\$45,260	\$36,210
Financial, insurance and related administrative support workers	29,100	20,100	\$44,980	\$35,980
Administrative				
Human resources and business service professionals	40,000	28,400	\$68,100	\$54,480
Administrative services supervisors	21,800	16,000	\$53,040	\$42,430
Administrative and regulatory occupations	54,600	34,400	\$49,820	\$39,860
Office administrative assistants - general, legal and medical	38,900	27,300	\$46,180	\$36,940
General office workers	55,500	35,200	\$40,300	\$32,240
Office equipment operators	5,800	4,200	\$36,740	\$29,390
Library, correspondence and other clerks	9,700	6,600	\$44,140	\$35,310
Total	572,100	397,600		

Notes:

- » The Mainland/Southwest economic region consists of the Fraser Valley, Greater Vancouver, the Sunshine Coast and Squamish-Lillooet
- » The average annual wage estimates are for a 40 hour-work week, 50 weeks per year, based on estimated hourly wages
- » The CAD/USD exchange rate used was \$0.80/USD

All levels of talent available in the MSA, including executive talent and the ability to recruit talent to the area

Labor Force Characteristics by Occupational Group 2016		
Occupation	BC Labor Force	Mainland/Southwest Labor Force
Executive/Management	81,100	58,500
Engineering with a preference for software development engineers (SDE)	73,300	57,300
Legal	69,800	45,900
Accounting	121,600	83,800
Administrative	226,300	152,100
Total	572,100	397,600

Source: Labour Force Survey custom tabulation data (2016) that is provided by the Labour Market Information Office, Government of BC

- » There are 572,100 people employed across BC and 397,600 employed in the Mainland/Southwest region across the different job categories identified as key Amazon HQ2 occupations
- » The Mainland/Southwest economic region is comprised of the Fraser Valley, Greater Vancouver, the Sunshine Coast and Squamish-Lillooet

Appendix F | Incentive Details

New Provincial Incentives - Amazon HQ2		
Incentive	Description	Approval Timing
Investments in Post-secondary Programming and Infrastructure	<div>s.17(1)</div>	<div>» The \$36 million over three years for programming space</div> <div>s.17(1)</div>
	<div>The provincial budget announced in 2017 budget already provides:</div> <div>»</div> <div>s.17(1)</div> <div>» \$36 million to fund hundreds of new spaces in technology-related programs over the next 3 years</div> <div>» \$5 million in new funding for graduate and post-doctoral internships</div>	<div>»</div> <div>s.17(1)</div>
Amazon-Global Immigration Solution	<div>The Province of BC will establish a dedicated Provincial Nominee Program Solution to provide permanent pathways for Amazon workers to live and work in BC</div> <div>»</div> <div>s.17(1)</div> <div>» In addition, the province will work with Amazon to understand their temporary work force needs and ensure Amazon has access to the appropriate streamlined federal channels, such as the newly launched Global Skills Strategy, which provides expedited access (4 weeks total) to international talent</div>	<div>» There are no legislative approvals required for the offer made.</div>
Cascadia Innovation Corridor	<div>The Cascadia Innovation Corridor is a cross-border initiative that aims to bring the Vancouver and Seattle regions closer together to increase economic growth and innovation. Recent successes include:</div> <div>» Opening of a new BC Trade and Investment Office in Seattle to help support BC tech exporters and Washington tech companies considering a presence in BC</div> <div>» Collaboration between BC Institute of Technology, Lake Washington Institute of Technology and Oregon Institute of Technology to jointly leverage applied education offerings in high-demand STEM fields</div> <div>» Establishment of the Cascadia Innovation Network, which focuses on introducing start-ups to cross-border funding and support opportunities. Members include University of Washington, Oregon Health and Science University, Portland State University Business Accelerator, BC's Innovation Boulevard, Accelerate Okanagan, and others</div> <div>New initiatives include:</div> <div>» New seaplane route linking Seattle and Vancouver harbours (final announcement expected by end of 2017)</div> <div>»</div> <div>s.17(1)</div>	<div>» Negotiations for the seaplane route are currently ongoing.</div> <div>»</div> <div>s.17(1)</div>

New Provincial Incentives - Amazon HQ2		
Incentive	Description	Approval Timing
s.17(1)	s.17(1)	<div>s.17(1)</div>
Tax Credits	<div>s.17(1)</div> <div>» Digital Animation, Visual Effects and Post-Production Tax Credit (DAVE) – a 16% tax credit rate designed to provide an incentive to production companies employing BC based talent to create digital animation and visual effects in BC</div> <div>» Production Services Tax Credit (PSTC) - a 28% labor based tax incentive that provides tax credits to Canadian or international film and television production corporations that have incurred eligible labor costs in BC</div> <div>» Interactive Digital Media Tax Credit (IDMTC) - a 17.5% tax credit rate designed for registered corporations that develop interactive digital media products in BC</div> <div>These tax credits are fully refundable (so long as they exceed any taxes payable by the corporation), non-transferable and cannot be carried forward.</div>	<div>» The existing tax credits are already in place.</div> <div>s.17(1)</div>

New Provincial Incentives - Amazon HQ2		
Incentive	Description	Approval Timing
Identity Management	<div>» BC Government is a recognized leader in growing its digital economy and delivering digital services to its citizens</div> <div>» BC is the only jurisdiction in North America with legislated authority to offer its citizens privacy enhancing digital identity capabilities. The program is delivered through the chip-enabled BC Services Card to 4 million residents and is the foundation upon which BC is moving forward into future digital identity capabilities.</div>	s.17(1)
	s.17(1)	
Affordable Housing	<div>Improving housing affordability is a priority for the BC government. BC has committed to:</div> <div>» Building 114,000 affordable units over the next 10 years</div> <div>» Formation of a housing working group reporting directly to Cabinet</div> <div>» Provincial Partnerships conference in December 2017 to identify further concrete actions government can take to improve affordability</div>	<div>» The 114,000 units to be built in partnership are a platform commitment and something that the Ministry of Municipal Affairs and Housing will be working to fulfill over the next ten years. BC Government has funding and program decision on implementation of the 114,000 but no legislation will be required.</div>
s.17(1)	s.17(1)	s.17(1)

New Provincial Incentives - Amazon HQ2		
Incentive	Description	Approval Timing
s.17(1)	s.17(1)	s.17(1)
Sustainable Tall Wood Buildings	<div>» The Government of BC is eager to advance new commercial partnerships to further the use of wood in leading construction projects, including creating links to technical expertise, overcoming code and regulatory barriers, and helping offset “innovation risks” and/or additional costs incurred to commercialize new building technologies and construction practices.</div> <div>» The BC Government will financially support the costs of promoting and leveraging the learnings and best practices from innovative wood construction projects</div> <div>» Amazon's own Minneapolis operations are located in the T3 building— an innovative wood structure designed and built by BC firms, using BC engineered wood products</div>	<div>» No legislative approval is required. The type of support referenced would be considered part of a normal program of activities</div>
Existing Provincial Incentives		
Incentive	Description	
Production Services Tax Credit (“PSTC”) Tax Incentive	<div>» A 28% labor based tax incentive that provides tax credits to Canadian or international film and television production corporations that have incurred eligible labor costs in BC</div> <div>» One of BC’s most significant investment towards specific industries, allowing taxpayers to think big and take impactful risks in their film production projects; in 2016, the BC government extended \$400 million in funding towards these industries</div> <div>» The incentive takes the form of a cash refundable credit; the total incentive that a claimant operating in this industry may be entitled to can exceed 60% of each eligible production dollar spent in BC</div> <div>» With Vancouver standing in for a number of global locations, and with the rest of the province providing lush, coastal scenery, BC can accommodate even the most customer obsessed location selectors</div>	
Digital Animation and Visual Effects (“DAVE”) Film Tax Incentive	<div>» A 16% tax credit rate designed to provide an incentive to production companies employing BC based talent to create digital animation and visual effects in BC</div> <div>» BC’s focus on targeting DAVE specific investments, one where significant overlap with the Gaming industry has emerged, has exemplified BC’s desire help its taxpayers insist on the highest standards within this priority sector</div>	
Interactive Digital Media Tax Credit (“IDMTC”)	<div>» This incentive takes the form of a 17.5% cash refundable tax credit; in other words, for every eligible salary dollar spent in the development of IDM products, claimants can receive a 17.5% tax credit, which if in total exceeds its BC taxes payable, becomes fully refundable</div> <div>» The program is an excellent tool allowing companies to hire and develop the best in R&D talent, as it helps drives operating cost efficiencies that allow claimants to competitively compensate their desired talent; in 2016, the BC government invested over \$65 million through this program</div>	
Canada - BC Job Grant	<div>» A federally funded, provincially administered program intended to help companies hire and develop the best talent available to them</div> <div>» The form of funding is a reimbursement of training costs incurred, capped at the lesser of 2/3 of eligible costs or \$10,000 per employee per year</div>	

Existing Federal Incentives	
Incentive	Description
Air Connectivity	<ul style="list-style-type: none">» The Blue Sky Policy provides Canada with air transport relationships with 120 countries world-wide» 70% of Canada’s international passenger traffic is covered by open air transport agreements, which support the launch of new air services between Canada and international markets
Business Development Bank of Canada (“BDC”) Venture Capital and Financing	<ul style="list-style-type: none">» BDC can support companies establishing in Canada through loans for R&D, technology acquisition, production expansion and real estate» BDC can also provide financing support for practically any project, including flexible repayment terms, longer amortization period and capital payment holidays, depending on needs
Financing Support for Inbound Foreign Investment	<ul style="list-style-type: none">» Export Development Canada (EDC) provides financing support to both greenfield and brownfield investments; these include investments in new facilities and projects in Canada, and investments in existing Canadian businesses with plans to expand or modernize production» Subject to the particulars of the investment, EDC financing may be available in an amount up to the purchase price or the investment amount
Scientific Research & Experimental Development (“SRED”)	<ul style="list-style-type: none">» Canada’s SRED program is one of the most generous incentive programs within the developed world; it delivers results with benefits exceeding 35% of every eligible salary dollar spent within BC» The program is intended to allow claimants to Learn and Be Curious, by shouldering some of the financial risks associated with being innovative, entrepreneurial, and driving technological change» The program is incredibly flexible in that it permits claimants to Think Big and allows them to structure their global intellectual property (“IP”) affairs as needed, with no requirement for IP to be maintained within country
Canada Infrastructure Bank (“CIB”)	<ul style="list-style-type: none">» CIB will use federal support to attract private sector and institutional investment to new revenue-generating infrastructure projects that are in the public interest
Dedicated Service Channel (“DSC”) for Global Skills Strategy	<ul style="list-style-type: none">» The DSC provides employers making significant investments in Canada with personalized support in navigating the immigration system» Companies using the DSC are linked to a dedicated account manager at Immigration, Refugees and Citizenship Canada who can provide information about available immigration program options and explanation of processes
Strategic Innovation Fund (“SIF”)	<ul style="list-style-type: none">» The \$1.26 billion SIF is a truly comprehensive, one-stop-shop for investment incentives within the Canadian market» The program will allow stakeholders to take ownership of their projects and their success, while driving strategic, creative, and meaningful investments to Canada» Funding is immensely flexible in form, dependent on the characteristics of each investment, all with the goal of helping applicants maintain their frugality principles while driving results with the investments they make





Appendix G | Letters of Support



October 17, 2017

Mr. Jeff Bezos
President, CEO and Chairman of the Board of Directors
Amazon
12th Avenue South, Suite 1200
Seattle, WA 98144
USA

Dear Mr. Bezos,

It is my great pleasure to invite you to make British Columbia the home of Amazon's second headquarters. We are impressed with the rapid growth you've already undertaken recently in the province. You're certainly valued as a key member of our tech community and we hope you'll make the decision to continue growing with us.

We recognize that Amazon HQ2 is an opportunity to take British Columbia's tech sector to the next level, building on the 150,000 highly skilled tech workers in our province and contributing the continued talent development and creative growth of this exceptional community.

In fact, highly skilled talent is the primary driver behind our booming, fast-growing tech sector. We're focused on attracting the best and brightest from around the world through our renowned post-secondary institutions and welcoming stance on immigration. This has resulted in a culturally diverse talent pool and business community that is entrepreneurial and heavily geared toward technology.

Our government is committed to supporting a vibrant and stable business environment. We take pride in strong fiscal management and a business-friendly economy.

Couple these factors with our proximity to Amazon HQ1, our well-developed ties to the Asia Pacific region, and our outstanding quality of life, and it's hard not to see British Columbia as the ideal second home for Amazon.

I'll end with expressing that my government is very serious and committed to working with you going forward. I encourage you to take the time to review the enclosed proposal and engage with us to explore why British Columbia would be an excellent place to further grow Amazon's footprint in North America.

Sincerely,

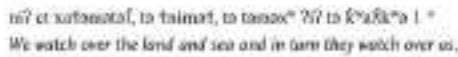
John Horgan
Premier

Office of the
Premier

Web Site:
www.gov.bc.ca

Mailing Address:
PO Box 9041 Stn Prov Govt
Victoria BC V8W 9E1

Location:
Parliament Buildings
Victoria



October 16, 2017

Dear Jeff,

Sincerely,

Gregor Robertson
MAYOR

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WWW.SURREY.CA



TELUS Corporation
23rd Floor
510 West Georgia Street
Vancouver, B.C. V6B 0M3

Tony Geheran
Member of the TELUS team

October 6, 2017

Ian McKay
CEO
Vancouver Economic Commission
401 W Georgia St #1500
Vancouver, BC V6B 5A1

Re: Support for Metro Vancouver's Amazon HQ2 bid

Dear Mr. McKay,

I am writing on behalf of TELUS to extend my enthusiastic support of Metro Vancouver's proposal to be the location of Amazon's second corporate headquarters, HQ2. At TELUS, we are committed to leveraging our technology and the collective skills of our team members to build stronger, healthier and more connected communities. In October of 2015, we announced a \$1 billion investment to connect the majority of homes and business in the City of Vancouver directly to TELUS PureFibre, some of the world's most advanced broadband technology. Our shared vision to transform Vancouver into the world's next gigabit-enabled city has come to life, with most areas of the city already connected and the downtown core expected to be connected by the end of 2019.

This investment provides one of Canada's largest urban centres with ubiquitous access to the fastest and most reliable Internet service available – adding more than 400,000 homes, businesses, hospitals, community centres and municipal offices to our fibre-lit landscape. TELUS PureFibre will help to build a greener, more inclusive and globally-competitive city and will undoubtedly improve citizens' lives through significant new social, educational and economic opportunities. This connectivity is further bolstered by our \$250 million investment to bring fibre to Surrey and \$150 million investment in Burnaby – creating one of the most connected metropolitan regions in North America.

In addition to our local deployment of fibre, TELUS recently achieved a significant breakthrough with the successful completion of a 5G wireless connection using the global 3GPP technology standards platform. This ground-breaking connection took place in TELUS and Huawei's 5G Living Lab in downtown Vancouver – a one-of-a-kind real-time laboratory made possible thanks to the backbone of the TELUS PureFibre network. As operators and vendors race toward the global deployment of 5G, this successful pilot represents one of the most advanced connections ever made using technologies that will form the standard for global 5G. It demonstrates the potential for 5G technology to deliver Wireless-to-the-Premise (WTTx) connectivity with the speeds and reliability necessary to power the smart homes and businesses of tomorrow.

Today's smart, tech-savvy workforce – the demographic Amazon will be looking to attract to fill 50,000 new jobs – is very much awake to the possibilities of a fibre-connected city. Innovations such as connected homes, driverless cars and smart-city services are going to be powered off a wireline backbone of fibre. Millennials, in particular, already value high-speed internet more than any other home feature. A network that connects Amazon employees to fibre at work, at home and throughout their

communities will help support a mobile workforce, reduce productivity-killing commutes and offer a substantially higher quality of life -- perks that will be game-changers when it comes to attracting, and keeping, top talent.

Amazon will also need a new home that is supported by an excellent tech-focused educational ecosystem. Our wealth of educational institutions offer a pipeline of emerging talent, but they also offer quality opportunities for children. Fibre is revolutionizing classrooms from kindergarten to grad school with innovative tools like interactive whiteboards, videoconferencing, automatically-updated digital textbooks, virtual field trips, and remote learning with the world's leading universities and teachers. A next-generation school system will fuel Amazon's success for years to come.

Vancouver should be at the top of the list when selecting a city that offers a high quality of life. TELUS Health and TELUS PureFibre are working together to provide communities with advanced services that lead to superior health outcomes. Our fibre networks are enabling telehealth services that reduce hospital admissions and the associated burdens to the healthcare system. Inventive applications being developed for gigabit-enabled communities include a 3-D video platform for physical therapy, in-home sensors for detecting early signs of illness, and a distance-treatment platform for psychological counselling. Importantly, fibre will further enable many of the breakthrough services we are developing, such as: electronic prescribing, online benefit check, and pharmacogenomics.

TELUS Garden is our corporate headquarters and our team's home in the heart of downtown Vancouver. It's also the first office tower in Canada to receive LEED Platinum certification for sustainable development. In fact, Amazon occupies a handful of floors at TELUS Garden where they enjoy green office space with gigabit-enabled fibre connectivity. Our Vancouver headquarters are also the home to our state-of-the-art Innovation Centre – a hub for research and development where we test and trial emerging technologies and services and help local entrepreneurs and businesses bring their ideas to life.

I think it goes without saying, but Vancouver is an extraordinary place to live. The beauty of our city is truly breathtaking and while I've yet to ski in the morning and windsurf in the afternoon, I know it's a possibility. Vancouver is a diverse and vibrant city that embraces all lifestyles and offers countless opportunities for entertainment, cultural and outdoor pursuits. At TELUS we believe that our people are our greatest strength and we understand that Amazon is looking for the perfect place to call home. We look forward to welcoming Amazon's HQ2 to Vancouver, where they can enjoy our beautiful city, state-of-the-art infrastructure, cutting-edge technology and Canadian hospitality.

Sincerely,

Tony Geheran
EVP & President, Broadband Networks
Member of the TELUS team

cc: Hon. John Horgan, Premier of British Columbia
Hon. Bruce Ralston, Minister of Jobs, Trade and Technology
Hon. Jinny Sims, Minister of Citizens' Services



TransLink
400 - 287 Nelson's Court
New Westminster, B.C.
V3L 0E7 Canada
Tel 778.375.7500
translink.ca

South Coast British Columbia
Transportation Authority

October 11, 2017

Mr. Ian McKay
President and CEO
Vancouver Economic Commission
Suite 1500, 401 West Georgia St
Vancouver, BC V6B 5A1

Dear Mr. McKay:

I am very pleased to support British Columbia and Metro Vancouver's bid to host Amazon's second headquarters in North America.

As someone who has worked for the public transit systems in New York and Seattle, I can say Metro Vancouver is home to a world-class, integrated and sustainable transportation network that is setting the standard for urban transportation systems in North America and contributing to making the Metro Vancouver region one of the most livable regions in the world.

Metro Vancouver represents a unique urban environment that is integrating sustainable transportation options at a scale unlike anywhere else in North America. More than 90 per cent of the region's population and two-thirds of workplaces are within walking distance of transit. Our automated rapid transit line – one of the longest driverless mass transit systems in the world – connects seven of the region's major cities over 79 kilometres of rapid transit and 53 stations. In fact, our Canada Line rapid transit moves people between downtown Vancouver and Vancouver International Airport in under 30 minutes.

We offer a fleet of more than 1,500 transit vehicles serving more than 210 routes and we operate three passenger ferries linking downtown Vancouver with the North Shore as well as a commuter rail service to the growing suburbs of Maple Ridge and Mission.

The numbers tell the story: every day, more than 400,000 people move around the region using public transit. More than 50% of the residents of the region reported using public transit over the last month and that number is growing. In the last year, ridership has grown by 7 per cent. In other transit agencies across North America, ridership is in

October 11, 2017
Mr. Ian McKay

decline. The Metro Vancouver region – 24th largest in North America by population – now has the 8th largest public transit ridership for a metropolitan region.

It's not just about transit. The Metro Vancouver region, with its temperate climate, has deliberately crafted a transportation vision that targets making it possible to make half of all trips in the region by walking, cycling, and transit.

And we're not standing still. Vancouver's economy and population is growing, and TransLink is making smart investments now: we are investing almost \$8 billion over the next 10 years in expanding and improving public transportation options. We are planning a major expansion of the SkyTrain rapid transit line along the Broadway corridor in Vancouver, a new street-level light rail system in Surrey, and expansions in the capacity of our existing system throughout the region.

We will continue to lead the way in providing convenient and sustainable public transit options for our thriving region and the many world-class industry leaders, innovators, and students who call Metro Vancouver their home.

Sincerely,

Kevin Desmond
Chief Executive Officer



October 6, 2017

Mr. Ian McKay
President and CEO
Vancouver Economic Commission
Suite 1500, 401 West Georgia St
Vancouver, BC
V6B 5A1

via email: imckay@vancouvereconomic.com

Dear Mr. McKay,

I am writing to you regarding your city's candidacy to attract Amazon's second corporate headquarters (HQ2). We have been made aware that different Canadian cities intend to apply and that as part of the Request for Proposal (RFP) process, Amazon has signaled that daily direct flights to Seattle, New York, San Francisco/Bay Area, New York and Washington, D.C. will be an important consideration in its final decision.

As such, I wanted to provide you with Air Canada's position that could support your city's bid for Amazon HQ2. Air Canada is particularly proud of its critical role in connecting the whole of Canada, but particularly its major metropolitan areas to markets in the United States and the world. This is strongly evidenced by these facts:

- 1- Air Canada is Canada's largest airline and the largest provider of scheduled passenger services in the Canadian market, the Canada-U.S. transborder market and in the international market to and from Canada. We fly to 64 airports in Canada, 57 in the United States and 91 in Europe, Africa, the Middle East, Asia, Australia, the Caribbean, Mexico, Central America and South America.
- 2- We do so by flying to more than 200 destinations on six continents from Canada. A customer of Air Canada from the major metropolitan centres can fly directly, or in many instances through only one connection to most of our destinations. Air Canada, Air Canada Rouge and its Air Canada Express regional partners operate on average 1,580 scheduled flights each day.

Air Canada knows air connectivity is a prime consideration for any company choosing a headquarters location. As Canada's largest carrier and the airline with the most transborder services between Canada and the U.S., we are uniquely positioned to connect Seattle or any other U.S. city with any successful Canadian city on a commercially viable basis. As such, steps would be taken to further facilitate travel to/from any successful Canadian city.

Sincerely,

Kevin Howlett

Senior Vice President, Regional Markets and Government Relations
Premier vice-président – Marchés régionaux et Relations gouvernementales

Kevin Howlett

Senior Vice President, Regional Markets and
Government Relations
Premier vice-président – Marchés régionaux
et Relations gouvernementales





Ian McKay
CEO
Vancouver Economic Commission
401 W Georgia St #1500
Vancouver, BC V6B 5A1

October 3, 2017

Re: Support for Amazon Headquarters bid for Vancouver, British Colombia, Canada

Dear Mr. McKay,

Harbour Air, North America's largest seaplane airline, is fully supportive of Vancouver's bid to host Amazon's next headquarters.

In fact, our company and Seattle's Kenmore Air are planning to begin scheduled service from downtown Vancouver to Seattle's Lake Union in the spring of 2018. This route would make it possible for executives to travel between the two cities' downtown centers in just under one hour — in fact, one could leave home in the morning and return in the same day.

We believe this scheduled airline service will add to the already robust transportation infrastructure that Vancouver offers. Already, we have thousands of seats being requested for this route, which proves the utility of this unique international service.

If Vancouver is successful in its bid for Amazon to relocate their new headquarters here, we believe that the seaplane transportation link will be an efficient way for Amazon to move individuals back and forth from these two corporate centers. To that end, we would be also pleased to provide Amazon with volume discounting on our fares for your employees.

We have operated in the Pacific Northwest for thirty-five years. We know there is no place like it. Vancouver offers a unique mix of urban sophistication, the laid-back atmosphere of a Canadian coastal city but also the entrepreneurial drive that builds companies and drives innovation.

We are proud to call this place home, and we hope Amazon will, too.

Sincerely,

Randy Wright
President, Harbour Air Seaplanes

HARBOURAIRGROUP.COM 1.800.665.0212 4769 Inglis Drive Richmond, BC V7B 1W4



AMAZON HQ2 PROPOSAL

**Talent.
Value.
Potential.**

