

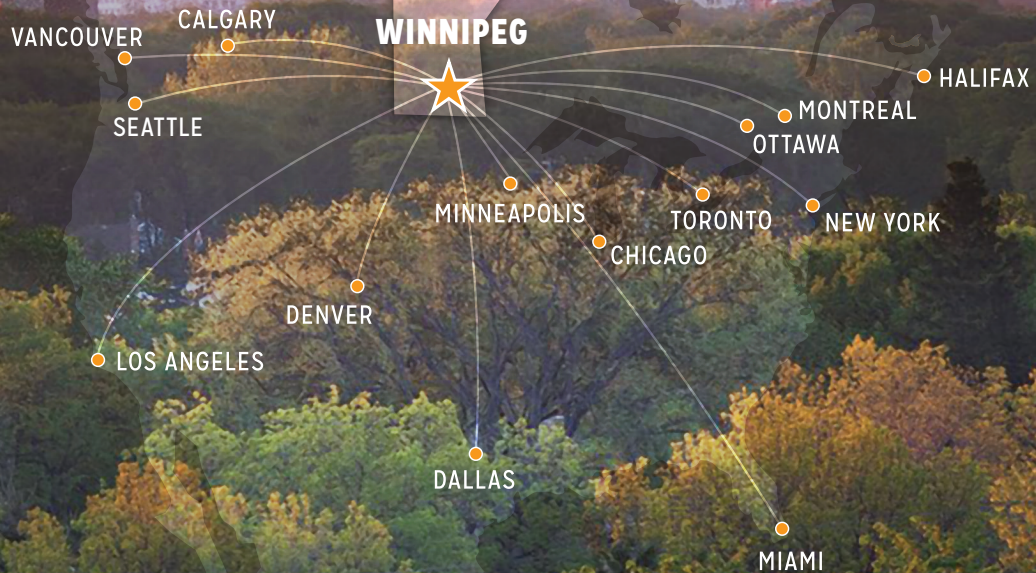


WINNIPEG

HEART OF THE CONTINENT



amazon



WE SOLVED EBOLA HERE.

In 2015, the vaccine was created in Winnipeg.

#1

Lowest cost of doing business compared to any other major Canadian city.

WINNIE THE POOH

The London Zoo's famous bear was named for Winnipeg.

4.18 CENTS/KWH

Among the lowest energy costs anywhere, 99% from sustainable hydro-electric.

**THE CELL
PHONE WAS
INVENTED
BY A
WINNIPEGGER.**

**0
MILES**

to the
geographic
centre of North
America.

**2,372
HOURS OF
SUNLIGHT
PER YEAR;**

among the most
in Canada.

**THE
PACKAGING
FOR
ALL
BACON**

sold in North America
was made here.

**JAMES BOND
IS FROM
WINNIPEG.**

Ian Fleming modeled 007
on Winnipeg-born spymaster
Sir William Stephenson.

1

**MEDIA RELEASE /
BACKGROUND /
FAQ**





FOR IMMEDIATE RELEASE

AMAZON SELECTS WINNIPEG FOR ITS SECOND CORPORATE HEADQUARTERS

Canadian prairie city tipped for location, talent, cost and lifestyle

SEATTLE - JANUARY 1, 2018 - Amazon will be shipping new ice skates to some employees as it warms up to Winnipeg as the home of its second corporate headquarters. The Canadian prairie city famed for its cultural diversity, entertainment scene and technologically innovative business sector won the competition as it outpaced competitors with its excellent combination of location, access to talent, cost of business, incentives and lifestyle.

"It has a great ecosystem for Amazon to plug in to. It's centrally located, gives our company a low cost of business and our people will enjoy an extremely high quality of life. We were also impressed with the entrepreneurial culture of the city, the support of all three levels of government and the existing network of big corporations and start-ups," said Jeff Bezos, Amazon founder and CEO.

Amazon's HQ will take over 22 acres of office space in a mix of heritage buildings and yet-to-be-built high rises in the downtown. The Amazon downtown campus is expected to grow to seven buildings within a 10-minute walk from one another through all-weather connections.

"Our key selection criteria demanded that we have access to a robust talent pool. The city needed to be a cultural fit for our company and it needed to offer our employees a great place to live and raise families. Winnipeg ticks those boxes," said Brian Olsavsky, Senior Vice President and CFO. "Winnipeg already has more than 20,000 workers in the IT space. It is the hub for a region that draws from nearly 20 universities and colleges including half a dozen major provincial and state universities. It is also home to diverse and thriving tech, bioscience, manufacturing and financial sectors."

Located at the geographic center of North America, Winnipeg's bid featured a compact, interconnected downtown campus. The city is rated by KPMG as having the lowest cost of doing business as compared to any other major city in Canada, and 15.1 per cent less than the U.S. average. At the same time, employees will save thousands of dollars a year in housing costs as compared to major urban centers such as Toronto.

"Our people can afford a better quality of life in Winnipeg," said Olsavsky, citing the average home price of \$283,000(CDN). "There wasn't a single other bid that could come close to the combination of vibrant arts and entertainment, housing and still have an average 20 minute commute by bike, bus or car."



FOR IMMEDIATE RELEASE

In Manitoba, Amazon will have access to provincial and federal tax credits and other programs that could amount to as much as \$1.76 billion over time. The City of Winnipeg has agreed to consider a Tax Increment Financing (TIF) program to help offset some of the initial development costs. TIF funding would be contingent on the taxable value of the real estate and could run for up to 25 years. While not quantified at the moment, TIF support could be substantial. A recent \$400 million development resulted in nearly \$20 million in TIF support.

Being Canadian ended up as a big advantage to the Winnipeg bid as it's estimated that Amazon may save more than \$11,800 per employee per year in health care insurance costs alone by locating north of the border. That works out to nearly \$600 million annually when the campus is at full capacity of 50,000 employees. The company said it expects to benefit from the progressive immigration policies of both Manitoba and Canada.

ABOUT AMAZON

Amazon is guided by four principles: customer obsession rather than competitor focus, passion for invention, commitment to operational excellence, and long-term thinking. Customer reviews, 1-Click shopping, personalized recommendations, Prime, Fulfillment by Amazon, AWS, Kindle Direct Publishing, Kindle, Fire tablets, Fire TV, Amazon Echo, and Alexa are some of the products and services pioneered by Amazon. For more information, visit www.amazon.com/about and follow @AmazonNews.

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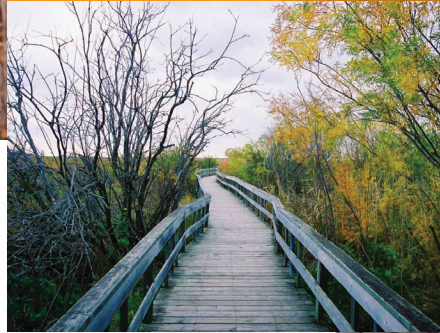


MEDIA BACKGROUNDER

WINNIPEG - AMAZON'S SPARK ON THE PRAIRIES

At the centre of North America - easy access, short commutes, clean air, highly educated workforce.

(continued on next page)



LOW COST

- Least expensive city to operate a tech company and a more affordable place for potential employees to call home
- #1 - Winnipeg was ranked the most Cost-Competitive City in the U.S. and Western Canada by KPMG in 2016
- According to KPMG Competitive Alternatives 2016, the overall effective corporate income tax rate in Winnipeg is 7.0 per cent, the lowest rate among the major metropolitan areas in Canada
- 15.1 per cent lower operating costs than U.S. average
- 4.18 cents/kwh (less than 1/3 the cost of Boston)
- Lowest industrial and commercial land costs among major Canadian markets

HIGH LIFE

- \$330,000 average home cost (two-storey detached)
- \$250,000 average condo cost (2 bdrm)
- 20 minutes - average commute time
- One to two hours - time to the beach and cottage country
- Home to BellMTS Place, a top concert venue
- Home to NHL's Winnipeg Jets and CFL's Winnipeg Blue Bombers

NATIONAL GEOGRAPHIC
TRAVELER NAMED WINNIPEG
ONE OF THE WORLD'S
20 BEST
TRIPS
FOR 2016

GREEN CITY

- 99 per cent renewable energy from one of world's largest hydro-electric generating jurisdictions
- One of the world's largest untouched boreal forests within a two hour drive
- More than 400 km (250 miles) of active transportation paths
- Four miles of skating trails on our rivers
- Over 1,300 urban parks

HOME TO INTERNATIONAL
INSTITUTE FOR
**SUSTAINABLE
DEVELOPMENT**

CONNECTED

- Direct flights to most major North American cities
- Largest air-freight distribution centre in Canada
- Direct rail connections to Pacific, Atlantic, Arctic oceans and Caribbean
- One of North America's largest truck transportation centres

EDUCATED

- 20+ universities and colleges within an easy drive, including 7 major provincial and state schools
- 18,400 IT workers in Winnipeg today

**TOP 7
RANKING**

ON THE INTELLIGENT COMMUNITY FORUM'S
LIST OF THE **MOST INTELLIGENT
COMMUNITIES IN
THE WORLD. TWICE.**

HOME OF CULTURE

- Canadian Museum for Human Rights
- World renowned Canada's Royal Winnipeg Ballet
- One of the world's largest collections of modern Inuit art at the Winnipeg Art Gallery
- Winnipeg Symphony Orchestra
- Assiniboine Park: Journey to Churchill

THE CAMPUS**Option 1 - Downtown Winnipeg**

- 22 acres of land area
- Heritage buildings, new buildings
- Connected campus (all weather)
- 15 minutes to airport
- Campus airport extension

Option 2 - University of Manitoba

- 107 acres of land area
- Greenfield site
- Connected campus
- 25 minutes to airport
- Campus airport extension
- Adjacent to U of M Smartpark

THE INCENTIVES**Province of Manitoba**

- Manitoba Research & Development Tax Credit – \$918.0 M
- Paid Work Experience Tax Credits – \$10.0 M
- Green Energy Equipment Tax Credit – \$16.0 M
- Manitoba Interactive Digital Media Tax Credit – \$5.3 M
- Manitoba Training Support – up to \$30.0 M
- **Total Manitoba – up to \$979.3 M**

Government of Canada

- Scientific Research and Experimental Development Tax Incentive Program (SR&ED) – \$780.3 M
- **Total Canada – \$780.3 M**
- **Combined Total – \$1.76 B**

OTHER SUPPORT**City of Winnipeg**

- Tax Increment Financing grant. Value to be based on real estate valuation. Requires City Council review.
- The City is prepared to assist with land assembly including possible inclusion of surplus City land.
- The City is prepared to consider financial support for infrastructure investments.

Government of Canada

- **Strategic Innovation Fund** – flexible funding options with repayable and non-repayable options
- **BDC Capital** – Invests directly into companies to help commercialize new tech.
- **Canada Infrastructure Bank** – Helps attract investment to revenue-generating infrastructure projects.
- **Export Development Canada** – Financing support for new facilities like the Amazon HQ.

**3RD
LARGEST
AEROSPACE CENTRE
IN CANADA**

OUR CITY

- 812,000 + in metro area
- 1.3 million in province
- 454,900 in workforce
- 7.8 per cent workforce growth (2011-2016)
- 6.6 per cent unemployment
- Strong immigration: +18,000 in 2016
- Low median age of 38.1 years

STRENGTH THROUGH DIVERSITY.
MORE THAN 100
LANGUAGES SPOKEN HERE.

DIVERSE, STABLE ECONOMY

Some of our corporate leaders:

- Great-West Lifeco (global headquarters)
- Wawanesa Mutual Insurance Company
- BellMTS
- TelPay
- Skip the Dishes
- 24-7 In Touch
- James Richardson & Sons, Limited (conglomerate)
- Monsanto Canada
- Cargill Limited
- Farmers Edge
- Boeing
- StandardAero
- GE Aviation
- New Flyer Industries (North America's largest bus manufacturer)
- Winpak (global packaging leader)
- Cangene

FREQUENTLY ASKED QUESTIONS

WHY WINNIPEG?

Many reasons, but four stand out:

1. location
2. access to talent
3. low cost of business
4. high quality of life for less money.

(continued on next page)



WHY WINNIPEG?

1. Winnipeg is at the geographic centre of North America. As one of the world's leading logistics and distribution companies, that means something. The city is a short direct flight to most major North American cities and is connected to three oceans and the Gulf of Mexico by direct rail links. Winnipeg is also home to a large concentration of trucking companies including several of Canada's largest fleets.
2. Amazon already knows Winnipeg. Home to Amazon company Thinkbox, the city has more than 18,400 IT workers now and hosts vibrant aerospace and biotech sectors.
3. Amazon loves frugality and there were few other cities that gave us the kinds of cost savings that Winnipeg did. It has among the lowest hydro electric rates in North America (important for running offices, and vital for heating and cooling AWS operations). When we did the math, the Winnipeg location showed the potential to save hundreds of millions of dollars on an annual basis.
4. While our Seattle employees may love the condo they bought last year for \$395,000, their Winnipeg colleagues will be living in a detached home for more than \$100,000 less. Some may enjoy kicking back on the beach or at the cottage an hour away. All of them will love the 20-minute commute and 2,372 annual hours of sunshine.

WHAT ELSE TIPPED THE BALANCE TOWARDS WINNIPEG?

With Winnipeg we found a civic partner who truly understood our *Day 1* philosophy. The city and province established a joint special office dedicated to providing Amazon with concierge-style services for site selection, planning, permitting and recruiting. That office functioned as a critical part of our decision-making as it became clear the city was going to help us expedite the entire process.

HOW WILL THIS STRATEGICALLY IMPACT AMAZON'S BUSINESS?

Amazon's long-term mission is to be the world's most consumer-centric company. To achieve that goal, we feel strongly that we need to set down roots in other countries. Having some corporate functions located in jurisdictions outside the United States symbolizes our

mission to make Amazon a truly global company. Canada is close to home, making travel and communications seamless. It is also a jurisdiction with friendly relations globally, a top-rated education system and a highly respected immigration system that draws talent from around the world.

Additionally, Winnipeg offers Amazon a gateway to the north. The city is already a main staging area for shipping to Arctic regions. And its northern latitude gives it relatively short air links to northern Europe and Asia.

Locating our second corporate headquarters in Winnipeg helps insulate the company against dangers of natural and other disasters.

WHAT WILL THE CAMPUS LOOK LIKE?

Winnipeg pitched us two campus options: downtown or the University of Manitoba. Both included an airport extension.

The Downtown Campus plan features millions of sq. ft. of office space spread through a mix of seven heritage buildings and new LEED certified high-rises. The buildings are connected by an all-weather walkway except the airport extension which is a 15-minute drive away. The downtown campus is well served by transit and bike paths.

The University of Manitoba Campus is a greenfield option of up to several million square feet of office space in the city's south end. It features 12 buildings in the university's SmartPark, home to research labs and businesses. The campus is nestled in a bend in the Red River, is served by rapid transit and is surrounded by leafy neighbourhoods featuring condos, detached homes, restaurants and shopping. It is a 25-minute drive to the airport extension.

WHAT CAN WE DO IN WINNIPEG?

Winnipeg has long been known as having a vibrant music and arts scene. Major festivals and top touring music acts fill the calendar. Recent concerts included Miranda Lambert, Deadmau5, Red Hot Chili Peppers, Roger Waters, Janet Jackson, Justin Bieber and Kanye West. Canada's Royal Winnipeg Ballet is one of the most famous ballet companies in the world. The city is home to the NHL's Winnipeg Jets, the AHL's Manitoba Moose and the CFL's Winnipeg Blue Bombers. Its minor league baseball team, the Winnipeg Goldeyes, won the American Association's championship this year.

1.3

FREQUENTLY ASKED QUESTIONS

DOESN'T IT GET COLD IN WINNIPEG? LIKE REALLY COLD?

We cannot tell a lie. Winnipeg gets cold in winter with bright blue skies and fine white snow that glistens in the sunshine. The city has made winter cool with miles of skating trails lined with international architecturally-designed warming huts, a lavish Scandinavian-style outdoor spa and vibrant winter festivities. There's plenty to do indoors too from restaurants with nationally-renowned chefs to art museums, clubs and dazzling concerts.

WHAT ABOUT SALARIES?

Our Winnipeg employees will be paid the same as their colleagues at *Day One* and elsewhere. What you do with the savings is up to you. Did we mention there is an international airport in Winnipeg?

WHAT ABOUT BENEFITS?

It's Canada, so, you know, free health care. Did you know that Canada's government health care system is ranked among the top 10 in the world and having it stands to save Amazon nearly \$600 million a year once the campus is at full capacity. Plus Amazon will provide competitive benefits packages.

MORE ABOUT THE INCENTIVES?

The governments of Manitoba and Canada have generous tax credit programs that we anticipate will bring up to \$1.76 billion in cash incentives over time. Additionally, the City of Winnipeg is prepared to consider Tax Increment Financing and other programs to assist Amazon in assembling and developing real estate. TIF funding is not yet quantified, but could be significant. A recent \$400 million development in Winnipeg qualified for nearly \$20 million in TIF funding.

WHAT ARE WE GOING TO CALL THE WINNIPEG HQ?

Jeff liked the idea of calling it Aurora Borealis HQ.



PRIME MINISTER · PREMIER MINISTRE

October 13, 2017

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 neighbours, 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.

Mr. Jeff Bezos
Amazon
410 Terry Avenue
Seattle, Washington
98109
United States of America

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.

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.

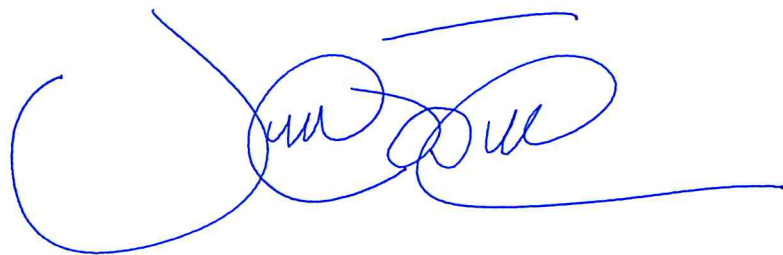
As Amazon decides on the location for its second North American headquarters, I am certain that Canada will stand out. With all our advantages and a government that is willing to invest in the future, the business case is simple.

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,

A handwritten signature in blue ink, appearing to read 'Justin Trudeau', with a long horizontal flourish extending to the right.

2

**CITY
OVERVIEW**



HELLO WORLD, DAY 1 IN WINNIPEG

We solved Ebola here.

More than 10,000 people died during the West Africa Ebola outbreak of 2015. Thanks to scientists half a world away in Winnipeg, that outbreak may be the last time humanity will need to battle that horrific disease.

(continued on next page)

Why should Amazon care about where the Ebola vaccine was created? Because it's symbolic of how Winnipeg solves problems and succeeds. And it's symbolic of how Amazon will thrive when it selects Winnipeg for its second corporate headquarters.

We are smart. We collaborate. We cooperate. We care. We have a global perspective.

Winnipeg has been a centre of commerce for more than 6,000 years, and while we have enjoyed great leaps forward during that time, we are reaching a zenith as a major centre of commerce and innovation. Amazon will prosper here like our virology lab has.

The seeds of the Ebola vaccine were planted here more than 30 years ago. Our city leaders came together to clear the way for the National Virology Lab (the only Level Four Bio Security facility in Canada). Winnipeg is now home to some of the world's leading virology experts. This critical mass was possible because of the talent that existed beforehand, but also because the governments, universities and private enterprise collaborated to make it happen.

WE ARE SMART.
WE COLLABORATE.
WE COOPERATE.
WE CARE.
WE HAVE A **GLOBAL
PERSPECTIVE.**

Winnipeg born Dr. Frank Plummer led the team that created the Ebola vaccine. A world-renowned HIV researcher first, Dr. Plummer is typical of the kind of world-leader you'll find here: humble, amazingly intelligent, truly collaborative and transformative.

BRIDGING THE LAST MILE FOR EVERY RESTAURANT EVERYWHERE

Joshua Simair is a Winnipeg leader of a different kind. As the co-founder of Skip the Dishes, Josh led a team determined to radically improve restaurant delivery service. His vision was to give customers better choice and better service, while also giving a delivery service to every restaurant who wanted one.

The restaurant industry didn't even know it needed Skip the Dishes. Now thousands of restaurants depend on it as a more efficient home delivery option while millions of consumers enjoy the convenience of a good curry or bento box or poutine at home.

Likewise, Chris Bond founded Thinkbox Software (an Amazon company) in Winnipeg, which provides creative tools and software for many different kinds of projects including the world's largest feature films. Backed by a team of talented software developers and visual effects experts, Thinkbox technology has gone on to be used in engineering and medical industries to create, visualize and modify datasets as large as city streets and as small as microscopic cells.

But you know about Thinkbox already.



SHORTENING YOUR FIRST AND LAST MILE

We can help you make your first mile (into the office every morning) amazing and the last mile (to your customers) as effortless as possible.

Imagine the new Amazon Canadian headquarters in a dynamic downtown campus. Thousands of your employees in leafy neighbourhoods that let them get into the office with an average commute time of just 20 minutes. Cycling to work will be popular with miles of dedicated bike lanes leading into the core from around the city. Transit offers clean, low-stress ways into the core every day too, including on the city's expanding rapid transit system.



The power grid is fed by renewable hydro-electric generating stations in the province's north. Manitoba Hydro is a net exporter of this clean energy to nearby jurisdictions including Minnesota and Wisconsin. The grid is so reliable that your engineers forget about it; your power bills are so low, your CFO (almost) forgets about them. AWS loves everything about it.

Diverse restaurants line the streets around the campus while food truck wars and farmers' markets provide a change of pace. The downtown indoor walkway system becomes popular in winter months and offers a different way to explore the downtown. Multiple hotels are linked to the campus, making it easy to host visitors.



The Winnipeg James Armstrong Richardson International Airport is just 15 minutes from your downtown offices. You can stop in to visit the Amazon campus airport extension building while offering you a highly secure facility that is plugged into your distribution network – or go board a flight to Seattle, San Francisco, New York or Washington. All major North American centres are less than three hours away by plane.

SPEED TO MARKET

Speed to market is key. We get that.

Winnipeg is at the geographic centre of North America. We're an hour from the U.S. border and our airport is the largest freight distribution centre in Canada. We are a major North American rail hub with direct access to ports on three oceans (Pacific, Atlantic, Arctic) and the Gulf of Mexico. And we are home to some of the continent's largest trucking operations because we are remarkably well connected by road.

Our location has always made us a trading hub. Today we have CentrePort Canada, North America's largest inland port, growing next to our airport. CentrePort offers 20,000 acres of high-quality, affordable access to tri-modal transportation including three Class 1 railways and our 24/7 global air cargo routes.

DEDICATED AMAZON SUPPORT OFFICE

Amazon will have a dedicated office – jointly sponsored by the City of Winnipeg and the Province of Manitoba – to provide complete support for government relations, recruiting, community outreach and more.

Think of it as the Amazon concierge office. It will be there to help expedite issues such as site selection, planning and permits. It will have tight relationships with local downtown development and business organizations as well as the federal government.

The mission of the office will be to facilitate a fast, smooth move.

THINK OF IT AS THE
**AMAZON
CONCIERGE
OFFICE.**

COLLABORATIVE, CONNECTED BUSINESS AND POLITICAL COMMUNITY

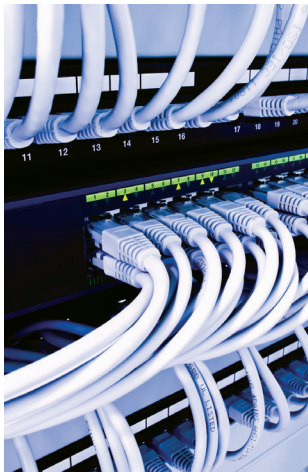
We pull together. And we can do it in a hurry if we need to.

When there's an urgent issue to discuss, it's routine for our business and political leaders to meet to advise one another and act to resolve the issue. The offices of the mayor and premier have a close working relationship,

and they periodically call on CEOs and other community leaders to weigh in with their counsel. Similarly, federal ministers are routinely briefed and invited to participate in local planning.

We get things done when we pull together like this. We'd love to show you what we mean.

REGIONAL TECH HUB FOR CENTRAL CANADA



Amazon is a world leader in artificial intelligence and using big data for new, innovative purposes. You won't be alone.

Winnipeg is already home to several cloud computing operations including those operated by BellMTS, Canadian Tire as well as Hewlett Packard's regional delivery centre.

Those companies selected Winnipeg in part because of its central location, educated labour pool and availability of inexpensive, renewable power. Servers don't need to be cooled when the temperature outside is -10 degrees Fahrenheit, and cooling them in summer is less expensive here than just about anywhere else in North America.

In 2017, *TechCrunch* noted "Winnipeg has managed to reinvent itself into a tech hub for central Canada, a region larger than Iran."

IN 2017,
TECHCRUNCH
NOTED
"WINNIPEG HAS MANAGED
TO REINVENT ITSELF INTO
A TECH HUB FOR CENTRAL
CANADA, A REGION
LARGER THAN IRAN."

The article singled out Winnipeg-based companies such as Farmers Edge, a precision agriculture operation that grew from Wade Barnes' basement into an international company by being nimbler than its much larger competitors.

The city already boasts more than 18,000 IT workers and the region boasts more than 20 post-secondary institutions within an easy drive. That includes five major provincial universities in Manitoba, Saskatchewan and Ontario, and four major state universities in Minnesota and North Dakota.

As a city, Winnipeg has also been growing faster than that national average due to immigration. The city has a diverse population base with large communities of Chinese, Indian and Filipino families. Winnipeg is also proudly known for its large Indigenous population, which constitutes more than 10 per cent of the city.

VIBRANT FOUR-SEASON LIFESTYLE



When you ask a Winnipegger about the benefits of living here, lifestyle will be at the top of the list. There are few places that can compete with the value for money offered here. You'll find affordable housing in a vibrant four-season city with one of the largest urban forests in Canada and plenty of parks spilling over into leafy streetscapes.

OUR WINTERS ARE
MAJESTIC WITH
BRIGHT BLUE
SKIES THAT STRETCH
 IMPOSSIBLY
 FAR.



Our winters are majestic with bright blue skies that stretch impossibly far. Going for a skate on our river system in February is a health tonic like no other. There is nothing like the feeling of your blades digging into the ice, your breath steaming, your friends smiling and laughing. We predict ear to ear smiles on the Amazon employees who commute to work this way.

The world's top architects compete every year for the privilege of designing warming huts along our river's skating trails. We made winter cool again. We have one of the largest winter festivals in North America and we draw visitors from hundreds of miles around to shop, visit our galleries, dine in pop-up restaurants on the ice and take in a hockey game.

You should know that we love hockey. We should get that out of the way. What's not to love? It's fast, exciting and delivers crunching hits in equal parts with amazing feats of athleticism. We would love to take you to a game. Our arena - BellMTS Place - has been named the #1 fan experience in the NHL. The fans make it that way.



We have a passion for the Winnipeg Jets (I'm sure you'll agree that Patrik Laine should have won rookie of the year last year), for living well and making the most of every moment.

And in summer, our historic rivers offer boating and water sports, and are lined with jogging paths leading us to artistic pursuits, top-notch concerts and world-renowned festivals. Cottage country is all around us, with its long sunny days spent floating on pristine lakes or lounging on miles of white sand beaches.

Come for the clean air, stay for the most spectacular sunsets on the planet.

And we're just getting started.

WINNIPEG IS
 AN ANCIENT
 PLACE THAT
 NURTURES
**THE MIND,
 BODY AND
 SOUL.**

CULTURAL DIVERSITY

Winnipeg is the home of the Canadian Museum for Human Rights. This is the only museum in the world dedicated to this vital theme, rights that people have been striving towards for thousands of years.

The spectacular building designed by architect Antoine Predock is now our skyline's most impressive jewel. And it's no accident that Winnipeg was selected as the home of this special museum. We are a place and people of peace and tolerance.

Our people come from around the world. More than 10 per cent of our population is Indigenous. Over the past 300 years, they have been joined by waves of immigrants. Early settlers were French, English and Scottish. Later, they were joined by Ukrainians, Polish, Russians, Dutch

OUR PEOPLE
 COME FROM
**AROUND
 THE
 WORLD.**

and Germans. More recently more immigrants have come from the Philippines, China, India, and Latin America.

It's noteworthy too that Winnipeg is home to the National Centre for Truth and Reconciliation and has the only dedicated Research Chair in Human Rights (residing at the University of Manitoba).

ECONOMIC DIVERSITY

Strategically located at the geographic centre of both Canada and North America, Manitoba boasts one of the most diverse economies to be found. With its rich natural resources, vast hydro-electric capacity, fertile land for farming, mature manufacturing base, and enterprising and highly educated people, Manitoba has something for every business person seeking steady economic growth. It's easy to see why discriminating investors in search of excellent investment opportunities and an exceptional quality of life make Manitoba home.

MANITOBA HAS ONE OF CANADA'S MOST DIVERSE ECONOMIES, AND IS MOST STABLE ECONOMIC PERFORMER IN THE COUNTRY.

Manitoba has one of Canada's most diverse economies, and is the most stable economic performer in the country. Real GDP growth in the Winnipeg CMA in 2016 was 2.4 per cent, exceeding that of Canada (1.3 per cent).

As of 2016, Manitoba's population is 1.3 million, with Winnipeg being the largest city in the province at a population of 812,000 – projected to exceed 1 million by 2035.

MAJOR BUSINESS SECTORS

The Manitoba economy is highly diversified, with a balanced presence in several industries and consequent economic growth that is among the most stable in Canada. As a result, the province remains well positioned in the face of changing global economic conditions.

Transportation and Distribution



With a long history as a transportation hub, Winnipeg is serviced by a global 24/7 cargo and passenger airport (James Armstrong Richardson International Airport), three Class I railways (Canadian National, Canadian Pacific and BNSF Railway); and an international trucking hub that includes two of Canada's largest trucking companies (Bison Transport and TransX).

More than 45,000 people are employed in Winnipeg's transportation and distribution sector, which is comprised of 5,900 business establishments. The border crossing south of Winnipeg at Emerson is the top-ranked border crossing in Western Canada, processing more than \$20 billion in trade traffic annually.

Aerospace



The home of Western Canada's largest aerospace hub, Winnipeg is the most cost-effective city for aerospace manufacturing among Western U.S. and Canadian cities.

Winnipeg's aerospace industry currently employs nearly 4,300 highly skilled workers, which grew by 30 per cent between 2009 and 2014. More than 60 aerospace firms are either headquartered or have major centres of operation in Winnipeg, including Boeing Canada, StandardAero, Magellan Aerospace and Cormer Aerospace. Winnipeg's aerospace companies produce and sell products and services valued at nearly \$2 billion per year.

The world's three largest aircraft engine manufacturers – General Electric, Pratt & Whitney and Rolls-Royce – operate engine test and certification facilities here, in which approximately 85 per cent of the world's new large commercial aircraft developmental engines are tested before they are approved for flight.

Advanced Manufacturing



Advanced manufacturing is Winnipeg's largest industrial sector, representing 13 per cent of the city's GDP and 11 per cent of all employment or more than 65,000 people. In 2014, manufacturing sector wages in Winnipeg were 16 per cent lower than the Canadian average.

Heavy-duty vehicle and equipment manufacturing accounts for about 10 per cent of Manitoba's annual exports. Manitoba is home to North America's largest bus manufacturers (New Flyer Industries and Motor Coach Industries), Canada's largest fire truck manufacturer (Fort Garry Fire Trucks), Canada's largest manufacturer of harvesting equipment (MacDon Industries) and Canada's only manufacturer of tractors (Buhler Versatile), as well as many other manufacturers of truck trailers, recreational vehicles, and mobile equipment for agricultural and resource-based industries.



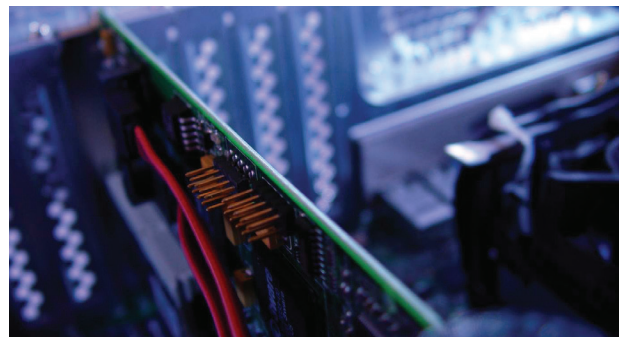
Agribusiness

Agriculture nourished Winnipeg's initial growth and continues to feed its success. James Richardson & Sons, the Canadian Grain Commission and ICE Futures Canada (Canada's leading agricultural exchange) are rooted in the city.

While commodity markets like grain and livestock are substantially mature, extraordinary potential for growth exists with functional foods, biocomposites and biofuels. R&D efforts are fertilizing innovative new products for the agri-food and fibre industries, for value-added food processing firms, for manufacturing and technology companies, and for the life sciences and biotech industries.

Annual sales within the food processing sector are about \$4 billion. Key companies include Archer Daniels Midland, Diageo Canada Inc., McCain Foods, Peak of the Market, J.R. Simplot Company, Nestle Canada Inc., Maple Leaf Foods, Bunge Canada and Pillsbury Canada Ltd.

Information and Communications Technology (ICT)



Winnipeg's large and small ICT firms contribute to a vibrant, entrepreneurial and diverse sector serving growth markets throughout the world. The city's low business costs help ICT companies competing in these global markets achieve better profit margins. Major ICT firms – including IBM and HP Enterprise Services – have operational hubs in Winnipeg. The city is also the headquarters of BellMTS, one of Canada's largest telecommunications providers.

There are more than 1,400 companies operating in the ICT industry in Winnipeg. There are more than 18,000 professionals employed in various technical, non-technical, management and support occupations. ICT professionals are employed across all sectors, impacting productivity and innovation across all of Manitoba's most important industries.

Interactive Digital Media



An emerging industry, Manitoba's interactive digital media (IDM) industry is made up of some 200 local firms and employs roughly 2,300 local professionals. Manitoba's local IDM companies develop websites and web apps, mobile apps, video games, virtual reality (VR) games and products, visual effects and motion graphics, and interactive educational software. A large segment of the industry is also focused on interactive marketing and social media.

Financial Services

Canada's largest mutual fund company and largest insurance company are the cornerstones of our financial services sector. With subsidiaries in Canada, the U.S. and Europe, Great-West Lifeco Inc. and its companies have more than \$1.2 trillion in consolidated assets under administration. Through its Great-West Life Assurance Company – Canada's

largest insurance company – and its subsidiaries, it serves the financial security needs of 12 million Canadians. Winnipeg-based IGM Financial Inc. has approximately \$142 billion in total assets under management.

Life Sciences

Manitoba is home to more than 170 active life science companies, about 70 per cent of which are in Winnipeg, a city that boasts the highest concentration of life science professionals of any city in Western Canada. Winnipeg is a centre of excellence in the areas of infectious disease identification and management, and a significant concentration of the province's activities in these areas resides in the Canadian Science Centre for Human and Animal Health, the Public Health Agency of Canada, and the International Centre for Infectious Diseases.



3

**CAPITAL
OPERATING
COSTS**

A combination of factors gives Winnipeg a highly competitive cost structure:

- a productive, well-educated and multilingual labour force that consistently generates competitive labour costs, among the lowest unemployment rates, the highest overall labour force participation rate, low turnovers and high productivity rate in Canada;
- a favourable business cost environment, including competitive office and land costs, reasonable construction costs and affordable taxes;
- an extensive network of R&D facilities and communication infrastructure supporting innovation and productivity enhancements;

- a convenient mid-continent location with cost-effective transportation links and intermodal facilities, providing shipping by road, rail, air and sea, enhanced by CentrePort Canada, the country's first foreign trade zone and inland port; and
- among the lowest electricity costs in North America.

COMPETITIVE LABOUR COSTS

When compared to other large metropolitan areas specializing in the ICT sector, Winnipeg has very competitive labour costs. The following table summarizes the median wages per hour for a sample of key ICT occupations across Canada.

Annual Salary Comparisons - Selected Occupations, 2016

	QA Programmer / Tester	Software Design Manager	Software Design Supervisor	Software Engineer	Software Programmer	Systems Analyst
Halifax	\$85,605	\$131,531	\$121,451	\$96,405	\$82,098	\$77,669
Regina	\$89,118	\$135,359	\$124,959	\$99,317	\$85,453	\$81,356
Winnipeg	\$88,854	\$136,250	\$125,975	\$99,951	\$85,157	\$80,598
Saskatoon	\$89,583	\$137,292	\$125,589	\$99,859	\$85,872	\$81,714
Quebec City	\$89,878	\$138,273	\$126,674	\$100,678	\$86,203	\$81,870
Edmonton	\$92,921	\$141,369	\$130,057	\$103,605	\$89,138	\$84,819
Vancouver	\$92,811	\$141,594	\$130,244	\$103,771	\$89,067	\$84,621
Toronto	\$94,317	\$144,849	\$132,476	\$105,421	\$90,480	\$85,978
Montreal	\$94,550	\$145,067	\$133,230	\$105,836	\$90,669	\$86,095
Calgary	\$96,751	\$148,423	\$136,014	\$108,316	\$92,773	\$88,028
Oklahoma	\$109,355	\$167,025	\$153,526	\$131,505	\$108,516	\$100,900
Kansas City	\$113,706	\$174,254	\$159,656	\$136,289	\$113,407	\$105,910
Cleveland	\$113,683	\$179,479	\$159,645	\$136,305	\$113,355	\$105,816
Austin	\$114,455	\$179,346	\$163,111	\$138,233	\$114,686	\$107,008
Raleigh	\$115,443	\$180,162	\$163,623	\$139,215	\$115,376	\$107,534
Minneapolis	\$118,588	\$183,010	\$165,966	\$141,611	\$118,482	\$111,024
Richmond	\$118,785	\$183,125	\$166,577	\$142,593	\$118,333	\$110,354
Chicago	\$124,820	\$188,369	\$172,643	\$148,677	\$124,406	\$116,448
Seattle	\$129,215	\$196,631	\$178,992	\$153,785	\$129,014	\$121,007
Boston	\$129,250	\$198,065	\$179,685	\$154,001	\$129,284	\$121,377
San Francisco	\$141,617	\$217,116	\$196,172	\$168,833	\$141,344	\$132,375

All costs are in U.S. Dollars, Exchange rate per U.S. Dollar: CDN\$ 1.2900

Source: KPMG Competitive Alternatives 2016

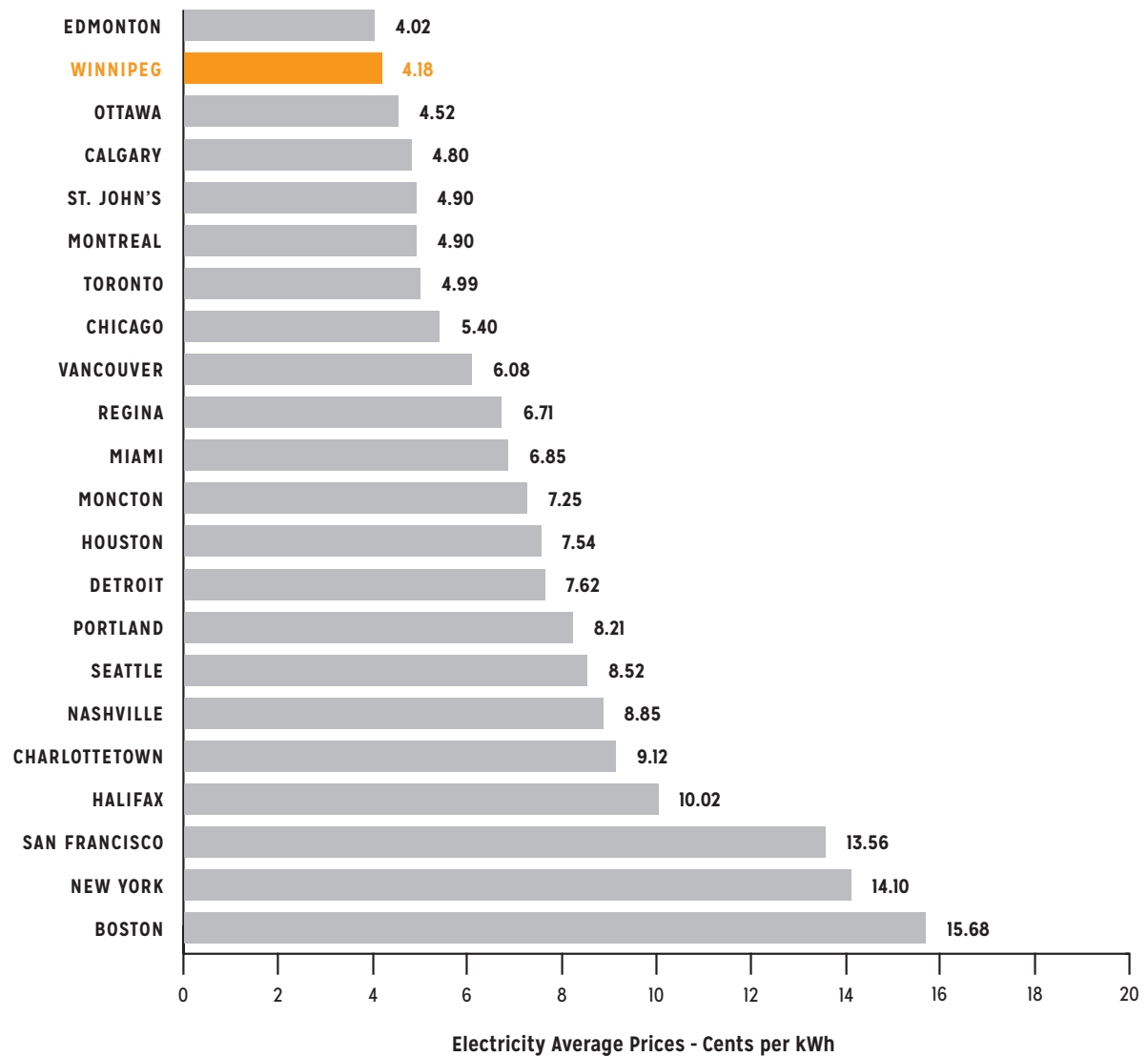
CLEAN, RELIABLE AND AFFORDABLE ENERGY

When it comes to energy, Winnipeg stands apart from other jurisdictions for three main reasons:

- among the lowest electricity rates in North America
- one of the most reliable power delivery systems in Canada
- surplus of existing power generating capacity

Average prices of electricity in North American cities (\$CDN) 2016

Power: 50,000 kW, Consumption: 30,600,000 kWh, Voltage: 120 kV, Load Factor: 85%



Source: Hydro Quebec, April 1, 2016

Natural Gas

For Commercial users of less than 680,000 m³ annually of natural gas, these are the current natural gas rates from Manitoba Hydro's subsidiary Centra Gas. Larger users of natural gas have a more complex rate structure.

Commercial Natural Gas Rates as of August 1, 2017

Rate Class	Units of Measurement	Small General Service (SGS) /1	Large General Service (LGS) /2
Basic monthly charge	\$/month	\$14.00	\$77.00
Primary Gas - quarterly rate service	\$/m ³	\$0.0921	\$0.0921
Supplemental Gas	\$/m ³	\$0.1559	\$0.1559
Transportation to Centra	\$/m ³	\$0.0538	\$0.0516
Distribution to customer/ customer sales service	\$/m ³	\$0.0866	\$0.0357

/1 SGS: is available to customers who use less than 680,000 m³ of natural gas annually. Typically more economical for customers using 13,770 m³ or less vs the LGS class.

/2 LGS: available to customers who use less than 680,000 m³ of natural gas annually. LGS is typically more economical for customers using more than 13,770 m³ annually.

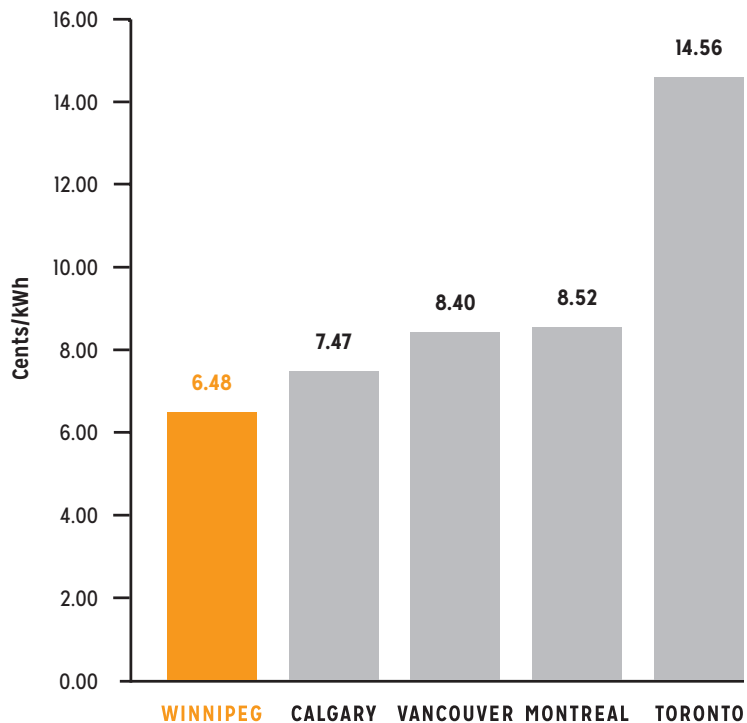
https://www.hydro.mb.ca/regulatory_affairs/energy_rates/natural_gas/current_rates.shtml

Low-cost Renewable Energy

- Manitoba has the lowest published energy costs in North America for business
- 99% of electricity generated in Manitoba is from reliable and renewable sources
- Power SMART program: savings incentives for businesses

Figure 1: Hydro Cost Comparison for General Service (Medium Loads) - 300kW (333kVa) 120,000 kWh

Source: Manitoba Hydro



LEAST EXPENSIVE CITY FOR TECH

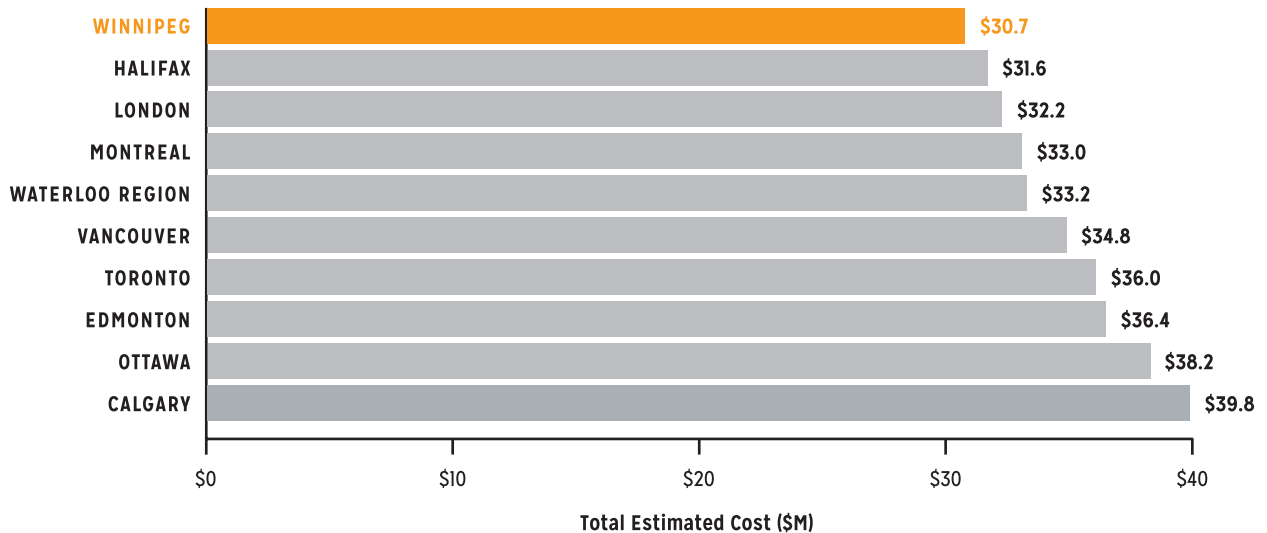
According to the CBRE Research 2016 Scoring Canadian Tech Talent Report, Winnipeg is the least expensive city to operate a tech company and a more affordable place for potential employees to call home. Based on a company with 500 employees and a 75,000-square foot office, the cost is \$30.7 million per year, \$9 million cheaper than Calgary and \$6 million cheaper than Toronto.

Office rent, which is the second highest cost for tech companies besides employee salaries, is one of the lowest in the country. The average asking rent per square foot in Winnipeg is \$23.54, compared to almost \$40.00 in Vancouver. Meanwhile, the average rent there for a purpose built apartment is \$925 per month, and roughly \$1,200 in Vancouver and Toronto.

Estimated 1-year costs by market: wage and rent obligation for typical tech firm in Canadian cities (\$M)

Typical Tech Firms Estimates: 500 Employees, 75,000 Sq. Ft.

“WINNIPEG IS THE LEAST EXPENSIVE CITY TO OPERATE A TECH COMPANY... AND A MORE AFFORDABLE PLACE FOR POTENTIAL EMPLOYEES TO CALL HOME.”
- CBRE

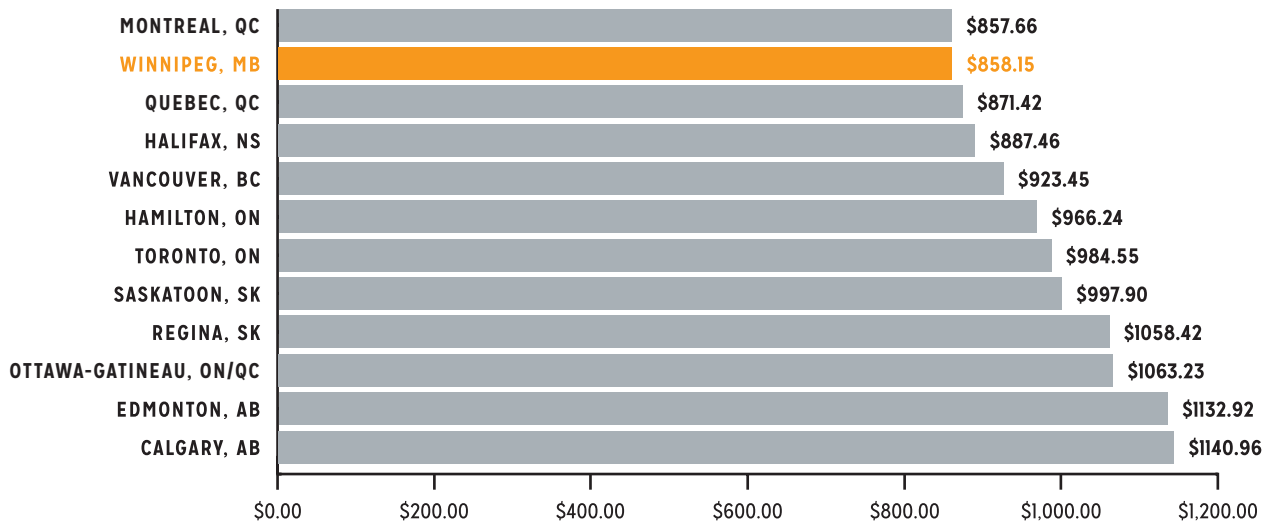


Note: Total estimated cost consists of rent cost, tech talent wages, support non-tech wages, and management wages.

Source: Statistics Canada, CBR Research

LABOUR FORCE

2016 average weekly wages by CMA, all industries



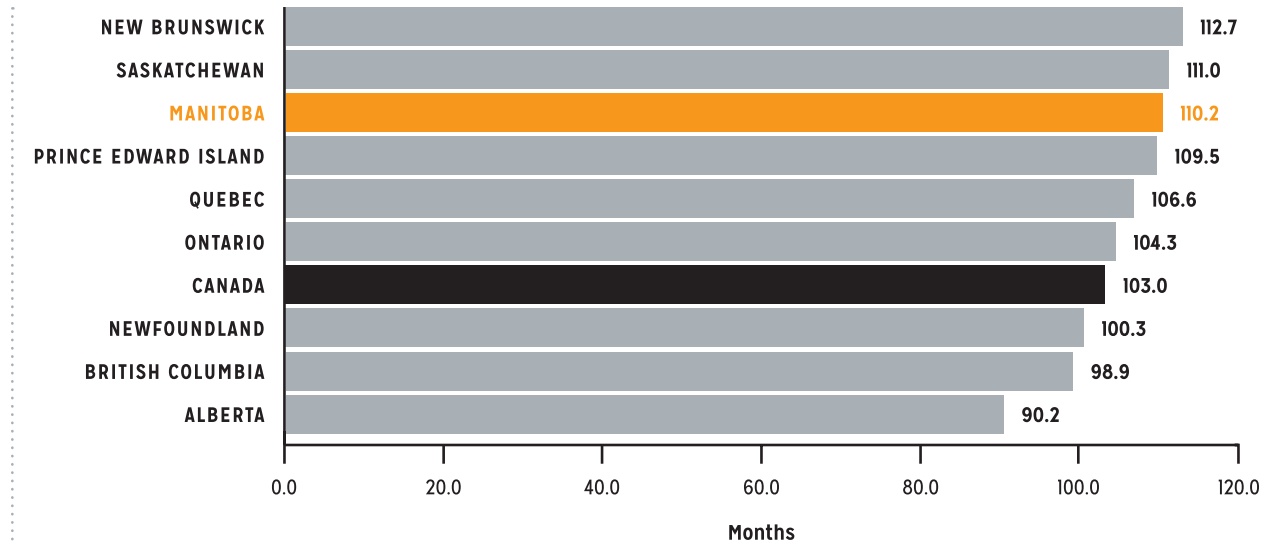
Source: Statistics Canada

Annual Salary Comparisons - Selected Occupations, 2016

Occupation	Winnipeg	Canada
Management occupations [0]	\$34.50	\$40.25
Senior management occupations [00]	\$51.65	\$52.40
Managers in engineering, architecture, science and information systems [021]	\$33.50	\$47.80
Administrative and regulatory occupations [122]	\$26.80	\$28.80
Administrative officers [1221]	\$29.40	\$27.65
Accounting technicians and bookkeepers [1311]	\$22.05	\$24.80
Computer and information systems professionals [217]	\$36.45	\$36.40

Source: Canada Job Bank

2016 Average Job Tenure by Province, All Industries



Source: Statistics Canada

TRANSPORTATION & DISTRIBUTION AVERAGE WEEKLY WAGES

Winnipeg offers access to a labour force comprised of hardworking and stable professionals, technicians and other manufacturing workers. Low attrition rates help Winnipeg's manufacturing firms reduce costs related to workforce turnover and knowledge loss. Due to Winnipeg's lower costs of living, labour rates for local employers are among the most reasonable of any major city in Canada. Compared to the national average, wages in Winnipeg are competitive for all transportation- and distribution-related subsectors.

Transportation and Warehousing Average Weekly Wages 2016

Location	Truck Transportation	Air Transportation	Rail Transportation	Warehousing and Storage
Winnipeg	\$915.99	\$959.06	\$1,362.29	\$780.06
Canada	\$979.78	\$987.78	\$1,395.41	\$805.50

Source: Statistics Canada (Canadian Business Patterns, 2012)

Overall and ICT Sector Average Weekly Wages

ICT Average Weekly Earnings by Province, 2016

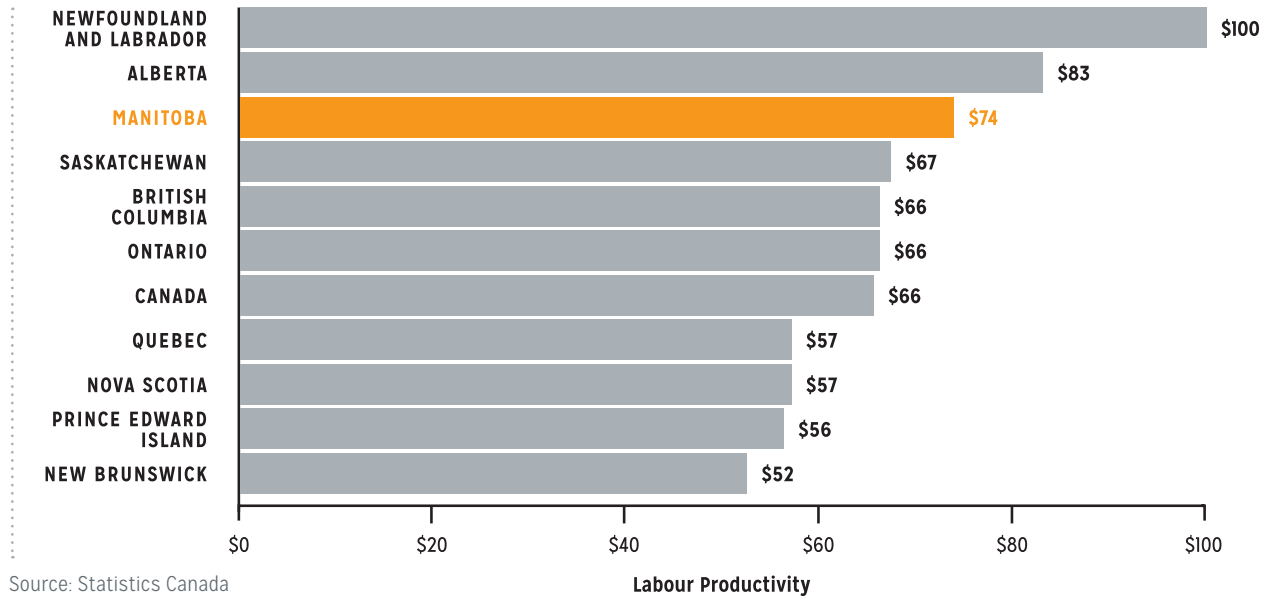
Location	Computer and Electronic Manufacturing	Telecommunications	Computer Systems Design
Canada	\$1,147.41	\$1,222.87	\$1,378.57
Manitoba	\$968.47	\$1,007.10	\$1,235.96

Source: Statistics Canada

ICT Labour Productivity

- Manitoba's labour productivity in ICT increased from \$67 per hour in 2010 to \$74 per hour in 2015 representing a 2.1 per cent increase per year on average.
- Manitoba's ICT labour productivity was the third highest among the other provinces.

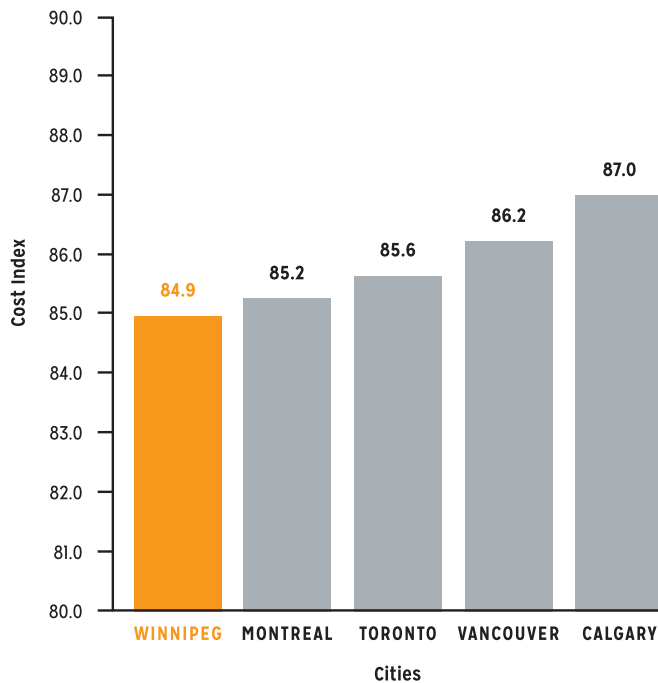
ICT Industry Labour Productivity by Province, 2015



WINNIPEG OVERALL OPERATING COSTS

WINNIPEG WAS RANKED
**THE MOST
 COST-COMPETITIVE
 CITY COMPARED
 TO THE U.S. AND
 WESTERN CANADA**
 BY KPMG IN 2016

**KPMG 10-year Total Cost Index,
 Overall Business Costs**



Source: KPMG Competitive Alternatives

Connectivity and Competitive Telecom Rates

Broadband connectivity

The availability of broadband in Winnipeg is at 100 per cent with an 88.8 per cent adoption rate. A competitive telecommunications environment, with several alternative long-distance carriers, keeps rates low in Winnipeg. With a central time zone location, Winnipeg's business hours are accessible and cost-effective across the continent.

4

MAJOR TAXES IN MANITOBA

FEDERAL & PROVINCIAL

Federal Value Added Tax (Goods and Services Tax)

Individuals, businesses and other entities pay the five per cent federal Goods and Services Tax (GST) on most goods and services. Most businesses, including manufacturers and processors, qualify for full input tax credits on the amount of GST paid on purchases made for business purposes where the firm is not the final consumer.

Manitoba Retail Sales Tax

The Retail Sales Tax is an eight per cent tax applied to the retail sale or rental of most goods and certain services in Manitoba. The tax is calculated on the selling price, before the federal GST (Goods and Services Tax) is applied.

Manitoba Health and Post-Secondary Education Tax Levy

The Health and Post-Secondary Education Tax Levy (HE Levy) is a tax imposed on remuneration that is paid to employees. The HE Levy is paid by employers with a permanent establishment in Manitoba. Employers with total remuneration in a year of \$1.25 million or less are exempted. Associated groups (associated corporations/certain corporate partnerships) must share the \$1.25 million exemption based on the total of their combined yearly payroll.

CORPORATE TAX RATES COMPARISON

Manitoba ranks on average when it comes to corporate income and investment income taxation in Canada.

Federal, Provincial and Territorial Rates

	Income Tax Rate: General, Manufacturing and Processing (M&P)		Income Tax Rate: Canadian Controlled Private Corporations				Capital-Tax Rates Financial Institutions (except Insurance)		Payroll Tax	Provincial Sales Tax
	Active business income earned in Canada to \$500,000	Investment Income Tax	Prov.	Comb.	Prov.	Comb.				
Federal Rate	15%	11%			34.67%		1.25%	-	-	
	Prov.	Comb.	Prov.	Comb.	Prov.	Comb.				
Manitoba	12%	27%	0% or 12%*	10.5% or 22.5%*	12%	50.67%	0% to 6%	0% to 4.3%	8% PST	

Source: Price Waterhouse Coopers, Tax Facts and Figures, Canada 2017

Effective Corporate Income Tax

ACCORDING TO KPMG COMPETITIVE ALTERNATIVES 2016, THE OVERALL EFFECTIVE INCOME TAX RATE IN WINNIPEG IS 7.0 PER CENT, THE LOWEST RATE AMONG THE MAJOR METROPOLITAN AREAS IN CANADA AND 3.0 PER CENT PERCENTAGE POINTS BELOW THAT OF CANADA.

Detailed Results by City - Overall Effective Tax Rates

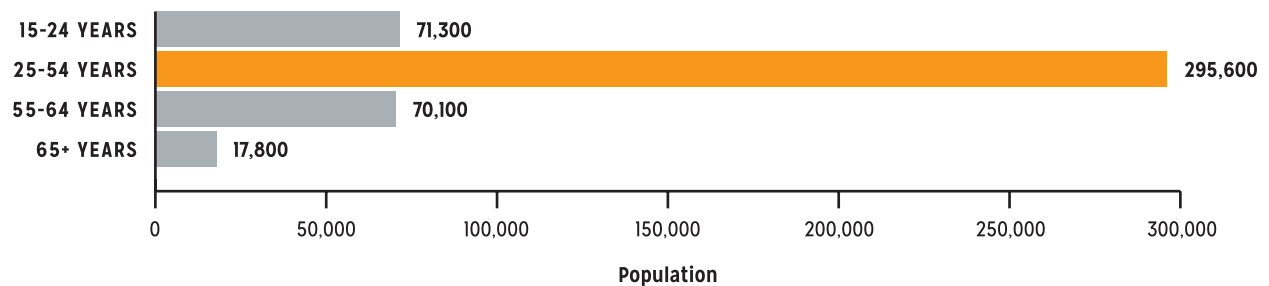
Location	Corporate Income Tax
Canada	10.0%
Winnipeg, MB	7.0%

Source: Competitive Alternatives, Focus on Tax 2016

WORKFORCE

Winnipeg's workforce in 2016 is 454,900 strong and grew by 7.9 per cent over 2011-2016, more than double the national average of 3.5 per cent.

Workforce Breakdown by Age Group



Source: Statistics Canada

5

SUMMARY OF PROPOSED SITES



DOWNTOWN CAMPUS



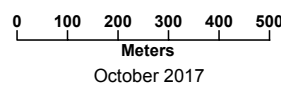
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DOWNTOWN CAMPUS



Source: CentreVenture

- Potential Sites
- Active Transportation
- Transit Network
- Transit Stop
- Weather Protected Walkway System
- Parks & Open Space
- Buildings
- Rails
- CentreVenture Mandated Area



October 2017

DOWNTOWN CAMPUS

Winnipeg's downtown is the entertainment, cultural and economic heart of our city and our window to the world.

Occupying the northwest corner of downtown, the Amazon campus will occupy multiple buildings and will be connected with a redeveloped walkway system and concourse. The campus will include existing structures which will be redeveloped and vacant sites that will have new facilities constructed.

**THE BAY,
A MARQUEE
HERITAGE
BUILDING,
WILL BE ONE OF THE
CAMPUS ANCHORS.**

The Bay, a marquee heritage building, will be one of the campus anchors. This beautiful, historic seven-floor department store will be redeveloped with additional floor plates added to the facility creating a mix of heritage and modern building design.

A redeveloped walkway system to the north of The Bay connects to a large downtown retail shopping centre and office complex which will be redeveloped with the addition of two new towers to be located on each end of the mall.

To the south, a redeveloped walkway system will connect The Bay to Winnipeg's preeminent entertainment venue the BellMTS Place home to the NHL's Winnipeg Jets. The arena and walkway system also connects to the new \$400 million True North Square which includes a new large public gathering space with numerous commercial retail locations and two large office towers.

Winnipeg's downtown is in the process of constructing several high-rise housing developments providing multiple housing options for staff within a short walk to the Amazon downtown campus.

The Downtown Campus is connected to Winnipeg's public transit hub. The transit hub is also connected to the expansion of Winnipeg Transit's Bus Rapid Transit system that will connect to all quadrants of the city.

The campus will also include an airport extension building at the James A. Richardson International Airport. A proposed BRT line will give staff easy access to the airport extension and to arrival and departure lounges. The facility is being proposed as an extension of the Downtown Campus to enable future development of Amazon distribution and fulfillment centres.

Zoning and Permitting

Winnipeg's downtown is pre-zoned to allow most development by right and without the need for public hearings or Council approvals.

These bulk standards may include a floor area ratio maximum number of storeys.

Downtown's Zoning District is defined as "Multiple Use Sector" that is intended to encourage the range of uses, sites, activities, and buildings typical to a diverse and vibrant central business district. This sector demonstrates a diversity of uses, including: office, retail, services, restaurants, entertainment opportunities, public institutions, multiple-family residential, and mixed-use parking facilities.

Level of Transit Service

The downtown campus is well served by Winnipeg Transit. Most city routes converge on downtown within a short walk of one or more of the downtown campus buildings. These corridors have the most frequent transit service in the city (buses every two to five minutes at peak times), and the longest span of service hours in the city (at least 06:00 am to 01:30 am, 7 days per week).

Downtown is connected to the James A. Richardson International Airport by two direct transit routes – the No. 15 Sargent-Mountain on Portage Avenue and the No. 20 Academy-Watt on Graham Avenue.

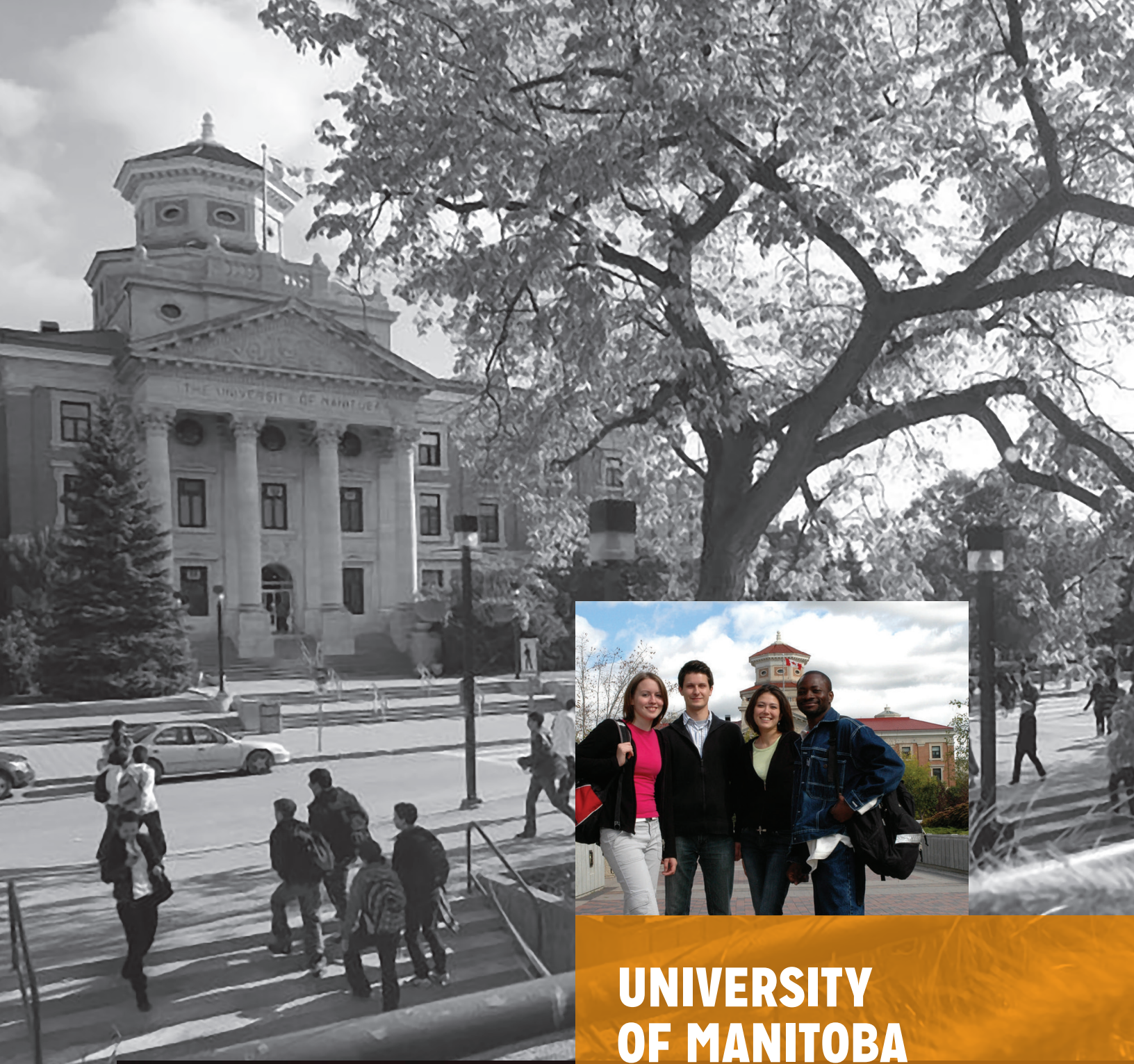
Winnipeg's radial transit network connects every neighbourhood in the city with downtown.

Integration with Future Rapid Transit Plans

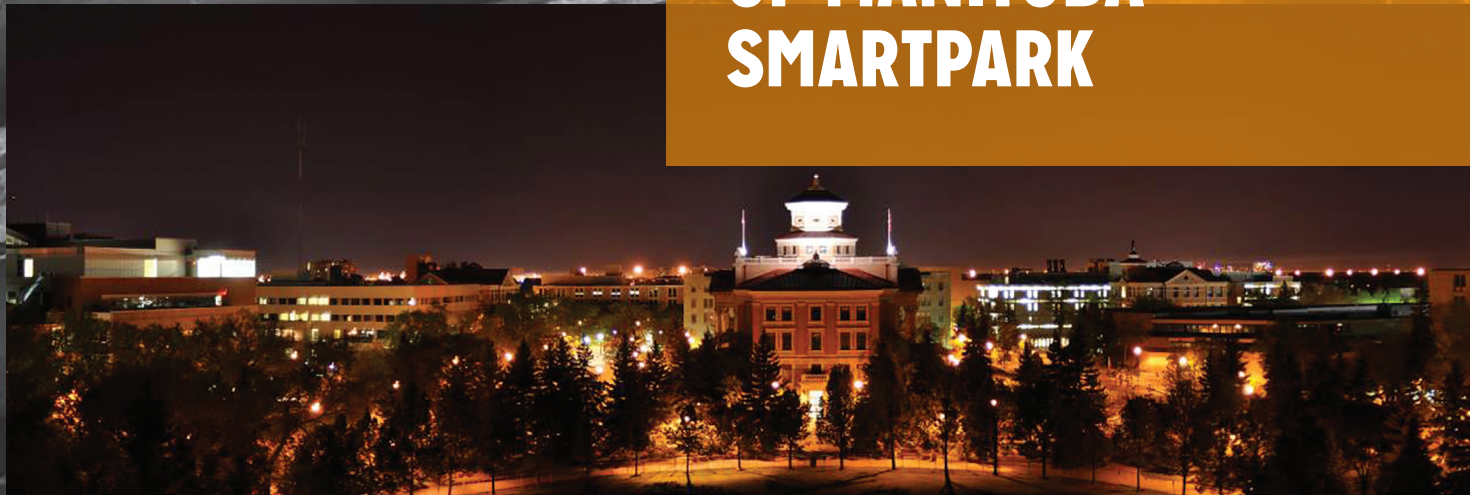
In addition to Stage 1 of the Southwest Transitway that has been in operation since 2012, Winnipeg has 6 Rapid Transit Corridors outlined in its 2011 Transportation Master Plan:

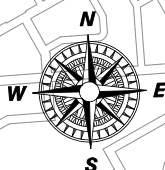
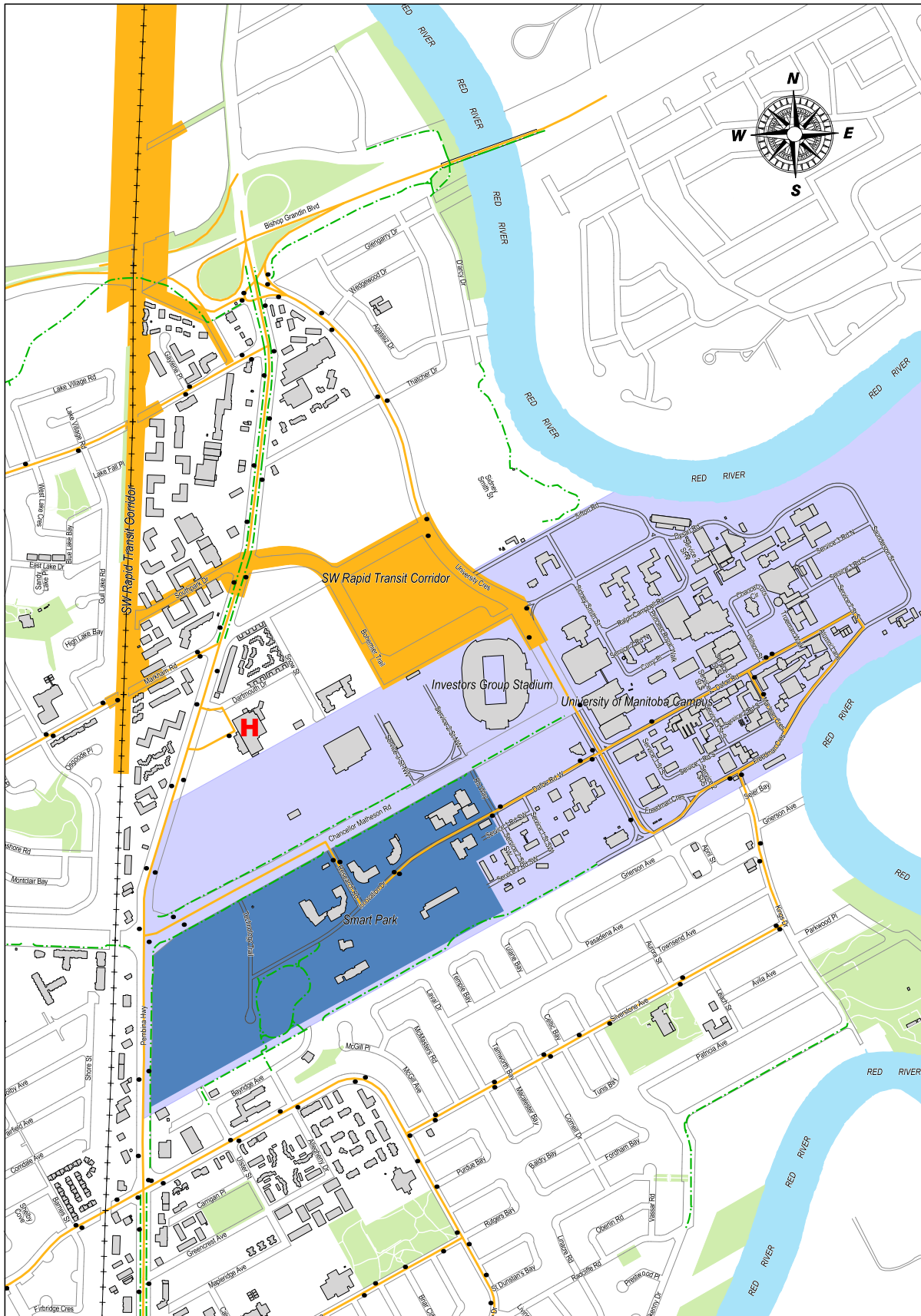
- Southwest Transitway Stage 2 (Pembina & Jubilee to the University of Manitoba – under construction and set to open in 2020)
- Eastern Corridor (downtown to Transcona)
- Main Street (downtown to Inkster)
- Portage Avenue (downtown to Polo Park, with further extensions beyond)
- Northeast Corridor (from the Eastern Corridor to the Perimeter Highway)
- Southeast Corridor (from the Eastern Corridor to Island Lakes/Royalwood)

All routes for current and future Rapid Transit Corridors converge on Downtown Winnipeg, and will serve multiple sites within the downtown campus directly.

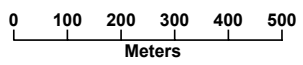


**UNIVERSITY
OF MANITOBA
SMARTPARK**





- Potential Site - 107 Acres
- Active Transportation
- Transit Network
- Transit Stop
- University of Manitoba Campus
- Parks & Open Space
- Buildings
- Rails



October 2017



UNIVERSITY OF MANITOBA SMARTPARK

This site is located at the University of Manitoba, the province's largest post-secondary institution with more than 29,000 students.

The U of M has leading Canadian faculties of science and engineering providing a pipeline of talent for Amazon.

This site creates the opportunity for direct collaboration between Amazon and the key faculties reflective of the skill needs for the company.

Smartpark is home to numerous globally respected research facilities including the Richardson Centre for Functional Foods and Nutraceuticals, RTDS Technologies and Emergent BioSolutions. It has helped launch many successful ventures including IMRIS, the Composites Innovation Centre and BASF Canada.

This site has first-class recreation facilities as part of the campus including Investors Group Field home to the CFL Winnipeg Blue Bombers as well as numerous concerts and other events.

Winnipeg's expanded BRT system connects Smartpark to Winnipeg's downtown core as well as other quadrants of the city providing access to multiple housing options for staff.

Transportation infrastructure for car and public transit provide easy access to the James A. Richardson International Airport.

Time to Operations - Planning Policy Context & Zoning

U of M Smartpark is appropriately zoned to support Amazon's proposed uses.

Level of Transit service

Transit service varies significantly throughout the large Smartpark area. Smartpark has two transit routes that pass directly through it - Route No. 51 and the No. 78 Crosstown West. Route No. 51 operates on weekdays from 06:30 a.m. to 1:15 a.m., and on Saturdays from 07:00 a.m. to 09:00 p.m. The 78 Crosstown West operates on weekdays from 06:00 a.m. to 11:00 p.m. and on Saturdays from 07:00 a.m. to 07:00 p.m. Neither route operates on Sundays.

The periphery of the Smartpark site is served by numerous additional routes.

Along Pembina Highway, it is served by three Rapid Transit routes - the No. 137, No. 162 and No. 170. The No. 137 is

a weekday rush hour express service only. The No. 162/170 operates from 05:30 a.m. to 02:00 a.m. on weekdays, and from 06:00 a.m. to 02:00 a.m. on Saturdays. The No. 170 operates on Sundays from 06:00 a.m. to 12:30 a.m.

The eastern end of Smartpark is served by most transit routes coming into the University of Manitoba. Service on this side of the site operates 7 days per week, from at least 06:00 a.m. to 01:00 a.m. and offers excellent connections to downtown.

Smartpark is connected to the James A. Richardson International Airport by either taking a No. 78 Crosstown West to Polo Park and transferring to a No. 20 Academy-Watt, or else taking a Route No. 160 or No. 161 Rapid Transit bus to downtown, and transferring to either a No. 15 Sargent-Mountain or a No. 20 Academy Watt.

Integration with future Rapid Transit plans

In addition to Stage 1 of the Southwest Transitway that has been in operation since 2012, Winnipeg has 6 Rapid Transit Corridors outlined in its 2011 Transportation Master Plan:

- Southwest Transitway Stage 2 (Pembina & Jubilee to the University of Manitoba - under construction and set to open in 2020)
- Eastern Corridor (downtown to Transcona)
- Main Street (downtown to Inkster)
- Portage Avenue (downtown to Polo Park, with further extensions beyond)
- Northeast Corridor (from the Eastern Corridor to the Perimeter Highway)
- Southeast Corridor (from the Eastern Corridor to Island Lakes/Royalwood)

Only the far eastern end of Smartpark is served by the Southwest Transitway.

TIME TO OPERATIONS - PERMITTING

The dedicated Amazon support office will be established at the City of Winnipeg and will have knowledgeable personnel assigned to guide Amazon through all relevant processes. The support office can also coordinate all applicable civic reviews in working towards achieving agreed milestones and targets.

The City of Winnipeg's permit delivery system is run through a "one stop shop" that coordinates the building and related permit application process and concurrent permit review processes by all mandatory permit review bodies.

The City of Winnipeg also offers staged building permits, (e.g. foundation, structural frame and final building permit), that allows proponents flexibility in design, construction and project completion.

Appropriate permits will be required prior to commencing work.

Project proponents are responsible to retain design professionals to assess the structural capability of any existing buildings they propose to retrofit or add to, to handle the impact of the development proposal in accordance with the most current version of local codes.

The City of Winnipeg targets the following initial complete review times for building permit applications:

- New Construction and Additions Permits - standard complete submission - 20 days
- New Construction and Additions Permit - staged submission - 15 days per stage
- Alterations to an existing building depending on complexity - 5-30 days

*Number of business days required for an initial review of a permit application by all civic departments involved; complete and compliant applications can be issued following the initial review. Applications that are missing information or are non-compliant with Codes and By-laws will be placed on hold until the issue(s) are resolved with the applicant.

Building permit turnaround can be influenced by the need for other development applications such as subdivisions, rezoning, variances and conditional use approvals.

In the Downtown, additional reviews which may be required include Downtown Design Review and Historical Buildings Review.



LOGISTICS AND TRANSPORTATION



LOGISTICS AND TRANSPORTATION

Winnipeg workers report an average commute time of 23.3 minutes.

Transit

- Winnipeg has a bus public transit system owned and operated by the City of Winnipeg with financial support from the Province of Manitoba.
- Daily ridership is more than 130,000
- The City of Winnipeg is currently implementing rapid transit using bus rapid transit. The first leg of the planned service route was completed in 2012. The second phase of this route is under construction and will be in service by 2020. Mayor Brian Bowman has stated his administration's intention to expand rapid transit service to all areas of the city including the airport by 2020.

Time to Airport

- Average commuter time from downtown to Winnipeg's international airport is under 20 minutes.

Access to Major Highways

- Within Manitoba, an expansive network of highways connects Winnipeg to the rest of Canada and the United States
- Winnipeg is located on the Trans-Canada highway, the national highway that runs across Canada
- Winnipeg is mile "0" of the Yellowhead segment of the Trans-Canada highway which is an alternative route for travel across the western provinces
- Winnipeg is directly linked to the United States through Interstate 29 in addition to 11 other highway border crossings in Manitoba to neighbouring U.S. states of Minnesota and North Dakota

Airport Overview

The Winnipeg James A. Richardson International Airport is one of the world's most reliable airports. The airport is conveniently located inside the city, close to downtown.

- ease of access to 60 direct flight destinations
- 3.16 million annual domestic passengers
- 437,162 annual trans-border passengers
- 185,336 annual international passengers
- 24-hour unrestricted international airport
- Domestic: Air Canada, WestJet, New Leaf Travel, Calm Air, Bearskin
- Direct U.S.: United & Delta Airlines
- Direct International: Air Canada, WestJet, Sunwing, Air Transat

Source: Winnipeg Airports Authority.

Commitment to New Direct Flights

When Winnipeg is selected as the home of Amazon's second corporate headquarters, the Winnipeg Airports Authority has committed to provide direct flights to Seattle, San Francisco, Washington DC, and New York City.

6

INCENTIVES

INCENTIVES

The Province of Manitoba and the City of Winnipeg are prepared to consider the following suite of incentives should Amazon select Winnipeg as the location for its HQ2.

Recognizing the limited information that both the Province of Manitoba and the City of Winnipeg have regarding

Amazon's HQ2 development plans, the following presents a framework of financial incentives that the Province and the City may consider in discussion with Amazon, should Winnipeg be short-listed for the HQ2 site selection.

SUMMARY

Program

Notional Total Value

(over 16 years, cumulative, unless otherwise noted)

Province of Manitoba:

Tax Credits:

Manitoba Research & Development Tax Credit	\$918.0 M
Paid Work Experience Tax Credits	10.0 M
Green Energy Equipment Tax Credit	16.0 M
Manitoba Interactive Digital Media Tax Credit (over 5 years, cum.)	5.3 M

Subtotal Manitoba Tax Credits up to \$949.3 M

Manitoba Training Support (over 6 years, cum.) up to 30.0 M

Province of Manitoba up to \$979.3 M

Government of Canada SR&ED Tax Credits \$780.3 M

Subtotal Government of Canada \$780.3 M

TOTAL \$1.76 B

A development timeline of 16 years has been assumed for the full HQ2 buildout. Other general assumptions are cited in the following program descriptions.

Incentive values indicated are notional, with actual values subject to confirmation of details of Amazon's plans and the requisite due diligence, and will be subject to individual program terms as indicated in the following program descriptions.

- **Manitoba Research & Development (R&D) Tax Credit**

This program targets scientific research and experimental development (as defined for federal purposes) carried on in Manitoba. Corporations may earn a 15 per cent tax credit which can be applied against Manitoba corporate income tax payable in the year earned. The credit is 100 per cent refundable for R&D performed under contract with a prescribed Manitoba institution, including post-secondary

institutions, and 50 per cent refundable otherwise. Unused credits can be carried forward 20 years or carried back three-years. This program is administered by Canada Revenue Agency on behalf of Manitoba.

Assuming Amazon HQ2 makes annual expenditures for eligible R&D at a rate equivalent to its current corporate average rate, and that the amount of eligible R&D spending at Amazon HQ2 grows in proportion to the overall project's growth, the notional value of tax credits earned could be over \$6 M in Year 1 and could reach over \$100 M in Year 16, for a notional cumulative value of \$918 M over a 16-year buildout. Actual value will be dependent on actual eligible R&D expenditures.

- **Paid Work Experience Tax Credits**

The Paid Work Experience family of tax credits provides qualified employers with income tax credits for the wages and salaries paid to certain types of trainee employees and recent graduates working in Manitoba. All components of this program are fully refundable

income tax credits, claimed on the corporate income tax return. They are available to those who hire co-op students for work placements as part of a recognized college or university program and recent graduates of registered co-op education programs. The following conditions apply to all components:

- Work must be performed primarily in Manitoba.
- The employer must reside in or have a permanent establishment in Manitoba.
- There is no limit on the number of hires.
- Eligible employer wage costs are net of other government assistance.

Assuming Amazon HQ2 hires 300 co-op students per year and 100 co-op graduates per year, it could realize tax credits notionally valued at up to \$625,000 per year, or up to \$10M over a 16-year buildout. Actual value will be dependent on the actual number of eligible co-op student and co-op graduate hires, and actual wage costs.

- **Green Energy Equipment Tax Credit**

This refundable tax credit promotes the production and purchase of machinery and equipment used to generate renewable energy in Manitoba. Eligible equipment includes geothermal heating equipment, solar thermal heating equipment and gasification and biomass-fuel energy equipment, installed in Manitoba and used in a business. This program is administered by Canada Revenue Agency and claimed on the corporate income tax return.

Assuming that Amazon HQ2 invests \$10 M per year in green energy technologies for the duration of its 16 year buildout, it could realize tax credits notionally valued at \$1M per year, or up to \$16M over the 16-year buildout. Actual value will be dependent on actual investment in eligible equipment and subject to standard program conditions.

- **Manitoba Interactive Digital Media Tax Credit**

This is a refundable income tax credit for companies that develop and produce eligible interactive digital media projects in Manitoba. Eligible projects must be approved by the Manitoba Department of Growth, Enterprise and Trade. The tax credit is administered by Canada Revenue Agency and claimed with the corporate income tax return. The program is currently scheduled to expire at the end of 2022.

Assuming Amazon HQ2 expends \$3M per year on wages for eligible digital media projects, it could realize tax credits notionally valued at \$1.05M per year, or up to \$5.25M over the 5 years to 2022. Actual value is dependent on actual wages spent on eligible digital media development projects and subject to standard program conditions.

- **Training Support**

To help ensure that Amazon HQ2 has access to top talent for its Winnipeg operations, the Province of Manitoba may offer non-repayable financial assistance to support training costs associated with the creation of specified new, full-time equivalent (FTE) positions in the province.

Assuming Amazon HQ2 trains 1,000 eligible FTE's per year for 6 years, Manitoba may consider non-repayable assistance notionally valued at up to \$5M per year, for up to 6 years, for a total notional value of up to \$30 M. This figure is based on a maximum program allocation of \$5,000 per new, eligible FTE position, to support training costs. It assumes a program duration of 6 years, which is estimated to follow the Amazon HQ2 project to the end of Phase 2 of its buildout.

Actual value will be dependent on actual training costs and on the number of eligible new FTE's trained. Funding assistance will be contingent on receipt of a mutually acceptable training plan, cost estimates, and a signed agreement between Amazon and the Manitoba Department of Education and Training. Funding assistance will not exceed actual cost of training, nor can it be used to cover the wage costs of trainees.

OTHER SUPPORT

Tax Increment Financing

Winnipeg has supported several transformational private sector investments primarily in our downtown through the use of Tax Increment Financing (TIF). Under a TIF arrangement the City agrees to reinvest the incremental property taxes generated from the redevelopment of a property into the development itself for a specified time period. We would be pleased to consider the use of TIF to support the HQ2, subject to a review of Amazon's real estate development plan for its HQ2 headquarters in Winnipeg.

TIF funding is not yet quantified, but could be significant. A recent \$400 million development in Winnipeg qualified for nearly \$20 million in TIF funding. Please note that any TIF arrangement for Amazon would ultimately be subject to review and approval of City Council.

Land

Officials from the City of Winnipeg would be pleased to work with Amazon to assist in the assembly of land for the HQ2 initiative, which could potentially include surplus City land for this purpose. As is the case with TIF, any transfer of City land to Amazon for HQ2 must first be reviewed and approved by City Council. City officials

would also be pleased to work with Amazon to expedite any sub-division and re-zoning as well as building permits required to construct HQ2 in Winnipeg.

Infrastructure

The City of Winnipeg has partnered with private industry in the past to invest in public infrastructure required to support the establishment and expansion of industry. The City would be pleased to discuss potential infrastructure assistance with Amazon once your company has selected a suitable site in Winnipeg to establish its second North American Headquarters.

OTHER GOVERNMENT OF CANADA SUPPORT

Strategic Innovation Fund

Amazon will be eligible for flexible funding options through this program that supports new high-quality business investments throughout Canada with repayable and non-repayable funding options.

BDC Capital

As a key player in Canada's venture capital market, BDC Capital invests directly into companies and indirectly to help commercialize new ideas in tech and other sectors.

Canada Infrastructure Bank

The Canada Infrastructure Bank can help attract private sector and institutional investment to new revenue-generating infrastructure projects.

Export Development Canada

Export Development Canada (EDC) is Canada's export credit agency, tasked with supporting and developing Canada's export trade by helping Canadian companies respond to business opportunities. EDC provides financing support to both greenfield and brownfield investments. These include investments in new facilities like the Amazon project.

Scientific Research and Experimental Development Tax Incentive Program (SR&ED)

We expect Amazon will be particularly interested in Canada's Scientific Research and Experimental Development (SR&ED) Tax Incentive program. The SR&ED program provides a tax deduction and an investment tax credit of 35 per cent of qualified expenditures. It is one of the best tax credits of its kind in the developed world.

7

**CULTURAL
COMMUNITY**

DEMOGRAPHICS

Population Growth

- Winnipeg's CMA population as of July 1, 2016: 812,000
- Winnipeg total number of immigrants in 2015-2016 of 14,963. This is a 10 per cent increase over 2010-2011.
- Just over one-half of all immigrants (53 per cent) were between the ages of 25 and 44.
- Canada's prairie economic regions (ERs) posted the strongest population increases in the country during 2015-2016.
- Seven of Canada's 10 fastest-growing economic regions in 2015-2016 were prairie ERs, including Winnipeg. The city achieved a higher rate of population growth than the national average.

Population estimates and annual population growth rates of economic regions, Prairies, July 1, 2011 to June 30, 2016 and July 1, 2015 to June 30, 2016

Location	2011	2015	2016	Annual Population Growth Rate (%) 2011/2016	Annual Population Growth Rate (%) 2015/2016
Canada	34,342,780	35,848,610	36,286,425	11.0	12.1
Winnipeg	681,114	723,230	739,097	16.3	21.7

Source: Statistics Canada, Demography Division.

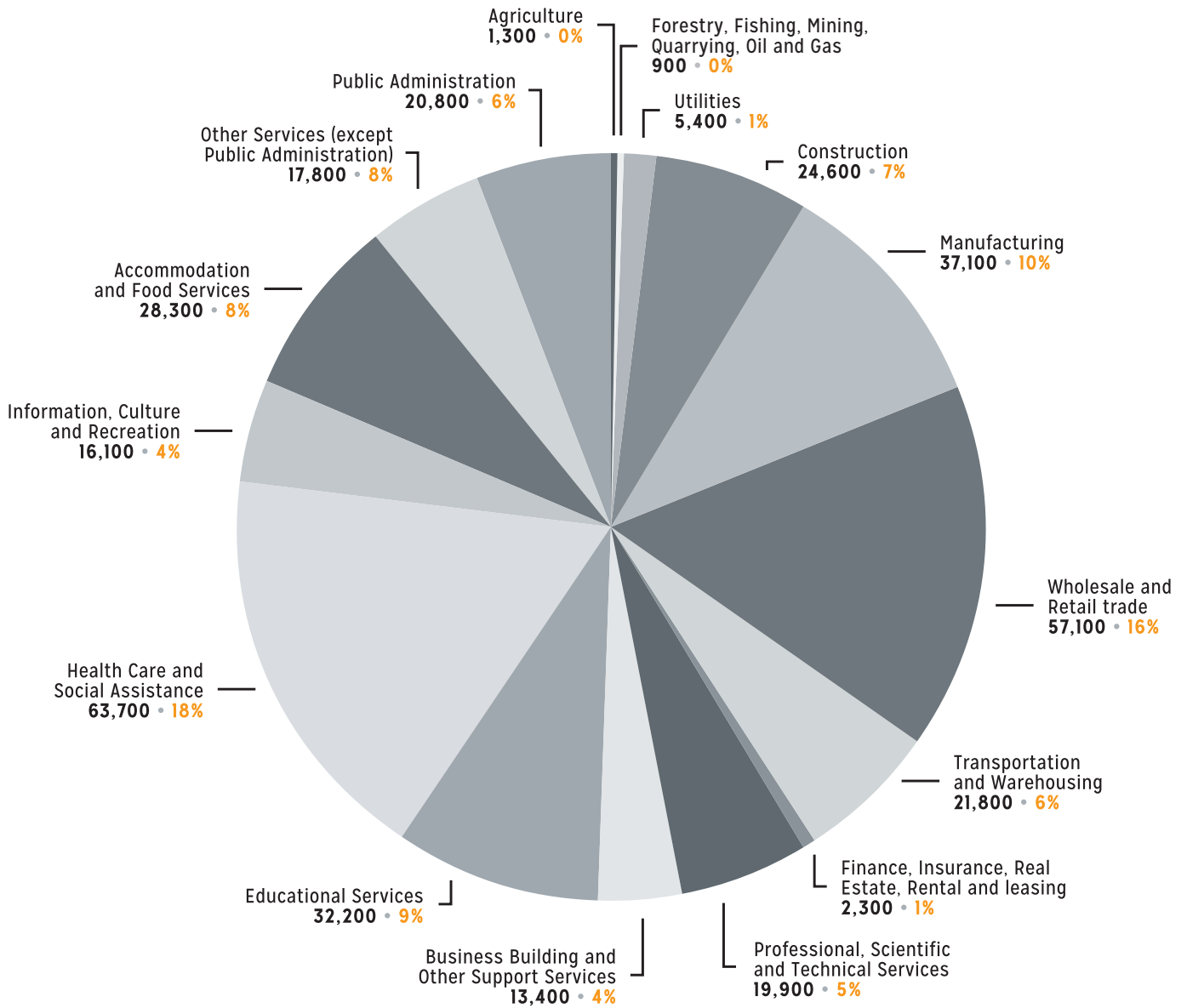
Of all the prairie ERs, international migration had the greatest impact on the growth rate of Winnipeg (+24.5 per thousand). This was the highest rate among the 76 ERs in Canada.

Population in private households, Immigrant population in Manitoba by place of birth, Census 2011:

- Philippines 45,240
- United Kingdom 13,235
- India 12,175
- Germany 10,850
- United States 7,415
- China 7,205
- Mexico 6,605
- Poland 5,520
- Portugal 4,060
- Ukraine 4,015

WINNIPEG HAD THE HIGHEST PER CAPITA GROWTH RATE BY IMMIGRATION OUT OF 76 ECONOMIC REGIONS IN CANADA

Winnipeg Employment by Sector, 2016



Source: Statistics Canada

Talent Pool

- Amazon intends to hire up to 50,000 employees. These will be primarily software development engineers as well as executive and administrative staff. Our city and province (governments, industry, academia), can help recruit workers, locally, nationally and internationally.
- Accessing the Existing ICT Labour Force – We will help create partnerships with local ICT groups, such as the ICT Association of Manitoba (ICTAM), the Canadian Information Processing Society (CIPS), New Media Manitoba and others, including the universities, who can assist with Amazon’s efforts to recruit qualified individuals from Manitoba’s existing workforce. Team Manitoba can also connect Amazon with recruitment firms that specialize in ICT talent.

ICT Sector Employment

ICT Employment by National Occupation Classification, 2016

Location	Total Industry	ICT	% of Total	Average % Change 2011-2016
Canada	18,079,900	1,044,400	5.8	2.9
Manitoba	633,600	23,100	3.6	3.1
Winnipeg	425,100	18,400	4.3	2.3
Winnipeg % Share of Manitoba	67.1	79.7		

Source: Statistics Canada

ICT occupations

- Nearly 33 per cent of Winnipeg’s ICT occupations are computer programmers and interactive media developers and information systems analysts and consultants.
- An estimated 1,000+ individuals work in management occupations within the ICT sector. They include computer and information systems managers and telecommunication carrier managers.

IMMIGRATION

Canada is a country that has been largely built on immigration. Immigration is part of Manitoba’s talent development and attraction strategy. The Provincial Nominee Program is the centrepiece of our provincial immigration strategy.

Manitoba Provincial Nominee Program

- The Manitoba Provincial Nominee Program (MPNP) is responsible for the selection of economic immigrants according to criteria developed by Manitoba that are consistent with the provisions of the Immigration and Refugee Protection Act and the Canada-Manitoba Immigration Agreement.

- The MPNP has two different selection processes, one for skilled workers and one for entrepreneurs.
- All applicants approved by the MPNP become provincial nominees. Nominees must then apply to Citizenship and Immigration Canada (CIC) for a permanent resident visa. CIC has the final authority to issue a permanent resident visa to any applicant if they are found to be true economic immigrants who pass security and medical background checks.
- The MPNP selects skilled workers according to their ability to establish themselves economically, to make a long-term contribution to the Manitoba labour market and to demonstrate their bona fide intention to settle as permanent residents in the province.
- Skilled workers apply via two paths:
 1. Applicants currently working in Manitoba, and
 2. Overseas applicants who can:
 - demonstrate their adaptability to Manitoba through strong connections, a viable settlement plan and sufficient, independent financial resources, and
 - be assessed sufficient points for age, education and training, work experience, and language ability.

- Sourcing Qualified International Educated Professionals – Manitoba Immigration and Employment Opportunities Division (IEO) can assist Amazon in identifying and hiring qualified economic immigrants (newcomers) and/or assist in international recruitment activities.
- IEO can identify streamlined entry options that could help bring in talent more quickly, such as work permits for intracompany transferees that are exempt from the Labour Market Impact Assessment (LMIA) process, streamlined entry for French-speaking or bilingual workers through the new Francophone Mobility Program (which is also LMIA exempt), and the Provincial Nominee Program (MPNP).

EDUCATION OVERVIEW

Winnipeg is home to two major universities, the University of Manitoba (U of M) and the University of Winnipeg (U of W), as well as the province's leading applied sciences college, Red River College (RRC). There are also two smaller universities, Université de Saint-Boniface (USB) and Central Mennonite University (CMU). More than 44,000 full-time students annually enroll in the city's post-secondary learning institutions, giving Winnipeg a diverse supply of highly educated and highly skilled workers.

Academic Partnerships

Manitoba's universities and colleges prioritize partnerships with industry, and actively work with industry advisory groups and/or local companies one-on-one to ensure that their programs are relevant and can meet current and future industry needs.

Universities and colleges are willing and able to partner with Amazon to tailor or enhance existing programming to generate local graduates with the types of skills and experience that Amazon requires.

U of M and RRC are both interested in collaborative research with industry, and have been successful in leveraging support from NSERC for collaborative research.

UNIVERSITY OF MANITOBA

The U of M is the province's largest university and only research-intensive university. The U of M has more than 20 faculties which educate students in the areas of business, science, engineering, applied mathematics, and other ICT-related programs of study. The university

is comprised of a faculty and staff of more than 8,500 and offers educational programs to more than 29,000 students.

The Faculty of Science offers degree programs in areas such as computer science, computer science with an emphasis on mathematics, applied mathematics, and actuarial mathematics. Computer science degrees at the university are accredited by the Canadian Information Processing Society's (CIPS) Computer Science Accreditation Council (CSAC).

The Faculty of Engineering's Department of Electrical and Computer Engineering is responsible for two undergraduate programs in Computer Engineering and Electrical Engineering, with more than 200 students in each program.

Computer Science

Student enrollment in Computer Science honours and major undergraduate programs is showing steady growth since 2010 (2nd-4th year only – 1st year is larger as it is a general multi-disciplinary entry level)

2016 – 545 students

2015 – 491 students

2014 – 476 students

2013 – 385 students

2012 – 369 students

2011 – 340 students

2010 – 310 students

Formal specialization designations include an accredited software engineering specialization, a specialization in artificial intelligence, and a specialization in graphics and human computer interaction.

Collaborations with Industry at the U of M

The U of M regularly undertakes ICT research collaborations with industry, government and other academic institutions. The U of M is at the forefront of R&D in a number of ICT areas.

The Internet Innovation Centre actively partners with Winnipeg companies to develop Internet applications and technologies. The centre is actively working with Winnipeg companies on projects for health informatics, tele-robotics, wireless sensor networks, Internet security, and other topics.

The Industrial Technology Centre (www.itc.mb.ca) includes a Virtual Reality Centre that provides easy access to the most advanced 3D visualization tools and expertise.

The Scanning Probe Microscopy and Nanofabrication Laboratory is a leading facility in Canada with R&D capacity in probe microscopy, micromachining and nanofabrication, semiconductor manufacturing and high frequency microelectronics and microwave circuit testing.

The Applied Electromagnetic Laboratory undertakes design and analysis of antennas and subsystems for wireless and satellite communications, radars and remote sensing applications, passive microwave components and arrays, electromagnetic modelling and simulations.

UNIVERSITY OF WINNIPEG

Consistently recognized as a leader in academic excellence by both Maclean's magazine and The Globe and Mail newspaper, the U of W has more than 9,000 undergraduate and graduate students.

The U of W Faculty of Science offers programs in applied computer science, engineering and other physical and life sciences fields. The applied computer science degree is available with emphasis in two streams: Information Systems and Health Informatics. The Information Systems (IS) stream is aimed at students interested in focusing on the information and business needs of the IT industry, while the Health Informatics (HI) stream provides students with more focused courses in health information needs, infrastructure, standards, and jurisdiction. The university also offers undergraduate business programs through the Faculty of Business and Economics, and additionally offers several master degree programs that lead to a Master of Science in Applied Computer Science and Society and a Master of Science in Technology.

Research at the U of W

The U of W's Applied Computer Science Department has several active research groups including the Quantitative Software Engineering Group and the Distributed Computing Systems organization. The GIS Laboratory of the Department of Geography focuses on analyzing the socio-economic impacts of climate change in central Canada.

RED RIVER COLLEGE

Red River College is Manitoba's largest institute of applied learning with more than 1,000 full-time enrollments across their ICT-related programs. RRC works closely with industry and employers to ensure that graduates have the right skills and knowledge to contribute successfully in the workplace. Successful partnerships have helped graduates to achieve a 95 per cent graduate employment rate.

RRC offers a two-year diploma and a one-year post-graduate diploma in New Media Design. The program offers three majors: Web Design, 3D Animation and Video and Motion Graphics. The program provides up-to-date training in web design and development, digital video, 3D animation, motion graphics and graphic design. It teaches both design fundamentals and technical skills, and encourages creativity, imagination, professionalism and a strong work ethic. Graduates from the program are able to design and build websites, shoot and edit digital video, create professional motion graphics, and construct complex 3D models and animation.

RRC offers several options for students to gain a fundamental understanding of business principles and concepts, and offers many business-related degree programs which include business information technology, computer accounting technician, computer applications for business, business administration, and international business. The business information technology program offers students an opportunity to specialize in one of four fields which include application development, database management, network management, and web development. The program is accredited by the Canadian Information Processing Society's (CIPS) College Program Accreditation Council (CPAC). CPAC works with academic institutions to ensure that educational programs prepare students for the demands of the information system profession.

Applied Research at RRC

RRC's Applied Research and Commercialization (AR&C) department supports applied research, knowledge transfer, prototyping, product development, testing and commercialization. The office helps business and industry access RRC's expertise to arrive at practical, innovative solutions that deliver results. Digital technology is one of the applied research focus areas for the College.

OTHER MAJOR REGIONAL UNIVERSITIES**Lakehead University**

Location: Thunder Bay, ON

Total Enrollment: 8,310

Relevant Programs:

- Computer Science – Honours BSc Co-op / Honours BSc / Minor
- Software Engineering – 4 year Bachelor of Engineering

University of Regina

Location: Regina, SK

Total Enrollment: 14,849

Relevant Programs:

- Software System Development
- Software Systems Engineering – B.A.Sc. / B.A.Sc. (Co-op) / B.A.Sc. (Internship)
- Software Systems Engineering – (M.Eng.) / (M.A.Sc.) / Ph.D. in General Engineering
- Computer Science – B.Sc. / B.Sc. Honours
- Computer Science/Mathematics B.Sc.
- Software Development B.Sc.

University of Saskatchewan

Location: Saskatoon, SK

Total Enrollment: 24,571

Relevant Programs:

- Computer Science – Four-Year B.Sc.
- Computer Science – Honours B.Sc.
- Computer Science – Double Honours B.Sc.
- Computer Science – Three-Year B.Sc.
- Computer Science – Minor
- Software Engineering – B.Sc. Honours
- Bioinformatics
- Interactive Systems Design

University of North Dakota

Location: Grand Forks, ND

Total Enrollment: 14,648

Relevant Programs:

- Computer and Information Sciences – Bachelor's degree
- Computer Systems Analyst Bachelor's degree
- Computer Science – Master's degree
- Computer Science – Doctor's degree – research / scholarship

North Dakota State University

Location: Fargo, ND

Total Enrollment: 14,516

Relevant Programs:

- Computer Engineering
 - Computer Architecture/Digital VLSI
 - Cyber Physical Systems

- Embedded Systems
- Computer Systems
- Computer Science – B.S. / B.A. / M.S. / Ph.D.
- Software Engineering – Graduate Certificate / M.S. / Ph.D.

University of Minnesota

Location: Minneapolis, MN

Total Enrollment: 67,480

Relevant Programs:

- Computer Engineering B. Comp E.
- Computer Science B.A
- Computer Science B.S. Comp. Sc
- Computer Science M C S
- Computer Science M S
- Computer Science Ph D.
- Software Engineering M S S C

Minnesota State University Moorhead

Location: Moorhead, MN

Total Enrollment: 6,624

Relevant Programs:

- Computer Science – B.S (Major)
- Computer Science – Minor
- Computer Information Systems – B.S (Major)
- Computer Information Systems – Minor
- Computer Information Technology – B.S. (Major)
- Computer Information Technology – Minor

PRIMARY AND SECONDARY EDUCATION

School divisions across the province have instituted early education programming for computers and information technology in primary schools. More advanced computer science and digital communications courses are taught at most junior high schools and high schools.

Sisler High School is One of Our Success Stories

Sisler is an award-winning school that has pioneered developing inverted classrooms and distance education collaborations across academic, cultural, social, and digital divides.

- The Sisler Network & Cyber Security Academy is the first program of its kind in Canada specializing in IT education that focuses on training students to think critically to solve real world business solutions as they master the technologies.
- The IDM program trains students for careers in film production, animation, visual effects, gaming, app design, and web programming.

SISLER STUDENTS WON FIRST PLACE IN THE CYBERPATRIOT INTERNATIONAL EXHIBITION, A YOUTH EDUCATION PROGRAM SPEARHEADED BY THE UNITED STATES AIR FORCE.

- In 2015 for example, Sisler students interacted in personal and meaningful ways with scientists and experts from the Math Museum in New York City; Canadian Space Agency shuttle astronauts; and industry leaders from Disney, Facebook, Twitter, Weta, Pixar, Sony, Microsoft.
- Sisler students won first place in the CyberPatriot International Exhibition, a youth education program spearheaded by the United States Air Force.

MAKE UP OF GOVERNMENT

The Progressive Conservative party was elected as the majority government of Manitoba in 2016. The Progressive Conservative government of Manitoba outlined a 10-point plan to create jobs and economic growth in Manitoba.¹ These 10 points are summarized as:

1. **Improving economic competitiveness**
2. **Attracting new investment:** Venture Capital
3. **Fostering a skilled workforce:** education and training.
4. **Investing in infrastructure:** clear Return on Investment (ROI).
5. **Promoting Manitoba trade** internationally and nationally: via target marketing and joining the New West Partnership (NWP).
6. **Encouraging new immigration:** enhance the Provincial Nominee Program (PNP) and increase family immigration
7. **Building on Manitoba industrial strengths** in target sectors: information technology, arts and new media, aerospace, agriculture, and manufacturing.
8. **Showcase Manitoba tourism**
9. **Create clean, green economic opportunities:** Support low-carbon growth opportunities and innovation.
10. **Ensuring a strong financial foundation for growth.**

¹ PC Manitoba (March 30, 2016):

http://www.pcmnitoaba.com/pallister_outlines_plan_to_create_jobs_and_economic_growth

GOVERNMENT WINNIPEG, MANITOBA

City Government

Form (Structure): Elected council / democracy

of Elected Officials: 16

Mayor

Name: Brian Bowman

Years in Office: Elected October 22, 2014

Next Election Date: 2018

City Manager (Yes or No): Yes

Provincial Government

Form (Structure): Legislative Assembly

of Elected Officials: 57

Top Elected Official

Name: Brian Pallister (Progressive Conservative Party)

Title: Premier

Years in Office: Elected April 19, 2016

Next Election Date: 2020

Provincial Manager (Yes or No): No

Federal Government

Form (Structure): Parliamentary Democracy

of Elected Officials: 308

Manitoba representatives: 14

Prime Minister

Name: Justin Trudeau

Years in Office: Elected October 20, 2015

Current Term Expiration Date: 2019

Allowed to Run for Another Term (Yes or No): Yes

Next Election Date: October 21, 2019

Senate

Name: Senate of Canada

Members: 105

Details: Appointed by the Governor General on the advice of the Prime Minister. Major areas get 24 seats each (Manitoba is part of the "Western Provinces" area and currently has 4 filled seats and 2 vacant seats).

8

**QUALITY
OF LIFE**

Winnipeg is a place where opportunities for personal and corporate growth are only limited by imagination. It's a place where you can grow faster, stronger and better in all aspects of your life. A place that is intelligent, creative and culturally diverse. A place where the infrastructure, supplier base and, most importantly the people are ready to help.

Winnipeggers tend to set down roots and stay because they know a good thing when they live it.

REAL ESTATE COSTS

Average residential prices

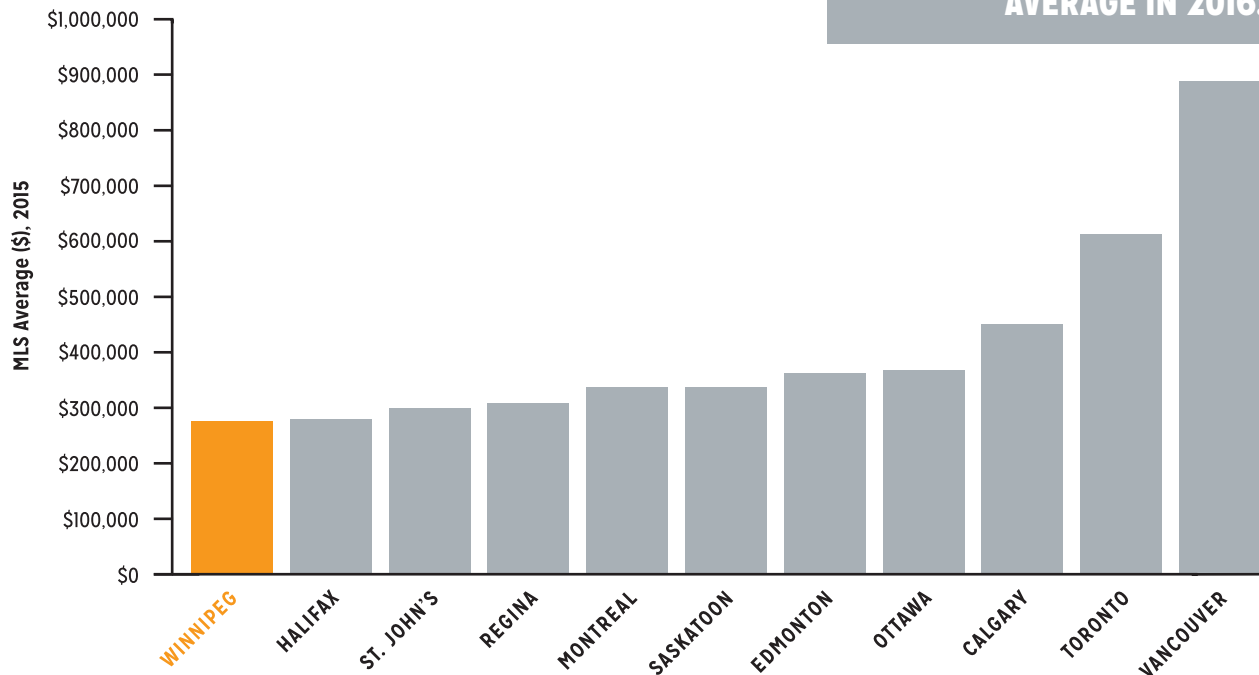
Winnipeg census metropolitan area and Canada, seasonally adjusted

Year	Winnipeg	Annual % Change	Canada	Annual % Change
2014	\$273,363	1.9	\$408,305	6.7
2015	\$278,270	1.8	\$442,877	8.5
2016	\$283,152	1.8	\$489,777	10.6
Average % Change 2012 - 2016		2.7		7.8

Source: The Canadian Real Estate Association

THE AVERAGE HOUSE PRICE IS AMONG THE LOWEST IN CANADA AT \$283,000 ON AVERAGE IN 2016.

Comparison of average house prices across selected CMAs



GIVE UP THE SHOEBOX!

THE AVERAGE PRICE FOR A HOME IN WINNIPEG IS \$283,000. THE AVERAGE CONDO GOES FOR ABOUT \$250,000. AND THE AVERAGE APARTMENT RENT IS \$927/MONTH.

RENTAL MARKET**Average Rent**

Winnipeg	\$927
Calgary	\$1,143
Greater Toronto Area	\$1,233
Vancouver	\$1,233

AFFORDABLE, HIGH QUALITY LIFESTYLE**Accessibility to Nature**

Winnipeg offers easy accessibility to numerous outdoor opportunities throughout the year. If you love the outdoors, come experience wilderness adventure in our 2.5 million acres of parklands, where you will find abundant wildlife and top quality vacation resorts. Cast a line into any of our 100,000 pristine fish-filled lakes. Living in Winnipeg, you are one hour from one of the top 10 fresh water beaches in North America.

Numerous campgrounds to pitch your tent amid towering trees. See moose, deer, beavers and waterfowl in their natural habitat. For the true adventurer, Manitoba's northland is as untamed and exciting as any safari. Discover remote fishing lodges, acres of untouched wilderness and miles of rugged tundra. On the shores of majestic Hudson Bay, visit Churchill – Canada's only sub-Arctic seaport – and see polar bears, beluga whales and the spectacular northern lights.

Manitoba has more than 125 golf courses across the province including more than 20 in the city of Winnipeg.

Arts and Culture

Winnipeg is known as the cultural cradle of Canada offering a variety of experiences. It is home to more than 30 performing arts entities including Canada's Royal Winnipeg Ballet, the Winnipeg Symphony Orchestra, the Royal Manitoba Theatre Centre, Manitoba Opera, Prairie Theatre Exchange and Winnipeg Contemporary Dancers. Winnipeg also offers an annual lineup of festivals including the Winnipeg Folk Festival, which attracts visitors from around the world. Folklorama, the world's largest cultural festival of nations. Festival du Voyageur, a celebration of Manitoba's French-Canadian heritage, the largest winter festival in Western Canada; plus there are a myriad of other music, drama, comedy and community festivals.

In music, we are known for our vibrant indie music scene. We have seen many of our artists go double, and even triple platinum including The Crash Test Dummies, The Watchmen and Chantal Kreviazuk. Other notable acts that got their start in Winnipeg are Neil Young, The Guess Who and Bachman-Turner Overdrive. Our musician-studded city has arguably the most live music per capita per night in Canada.

The Winnipeg region hosts festivals 130 days of the year, including Canada's largest folk music festival. We host the Winnipeg International Jazz Fest, Winnipeg Aboriginal Film Festival, ACTRA Manitoba Awards, Freeze Frame, Winnipeg Underground Film Festival, Winnipeg Jewish Film Festival, Cinémental and many others.

Assiniboine Park is home to Journey to Churchill, the world's most comprehensive northern species exhibit, where events can include an audience of swimming polar bears and seals as they play in overhead pools.



**“VAGUELY EXOTIC,
TOTALLY OBSCURE AND
AN ABSOLUTE
MUST VISIT DESTINATION.”
- VOGUE MAGAZINE**

The Winnipeg Art Gallery hosts international travelling exhibits each year. The city is home to the Canadian Museum for Human Rights; the only museum of its kind in the world to promote the principles of human rights.

Sports and Recreation

Winnipeg's sports teams:

- NHL's Winnipeg Jets
- AHL's Manitoba Moose
- CFL's Winnipeg Blue Bombers
- American Association Baseball's Winnipeg Goldeyes
- University of Manitoba Bisons (various sports)
- University of Winnipeg Wesmen (various sports)

Winnipeg has played host to major athletic events including the PanAm Games, which has left the city with a rich legacy of top-rated recreation facilities for swimming, speed skating, cycling, yachting, canoeing, kayaking, rowing, athletics, soccer and more.

Six per cent of Winnipeg's total area is made up of more than 1,500 parks, playgrounds and athletic fields. We have four community parks and recreation branches that offer between 6,000 to 10,000 programs annually.

SAFETY

Clean air and water are no longer something to be taken for granted, even in Canada. In Winnipeg, smog is virtually non-existent and clean, abundant, clear water is readily available.

Manitoba's clear skies are another benefit of the province's clean source of electricity, almost entirely produced by water-powered non-greenhouse gas producing hydraulic generating stations.

City of Winnipeg Crime Stats

Crimes	2016	2015	2016/2015 % Change
Violent Crimes per capita	0.012	0.011	6%
Property Crimes per capita	0.043	0.040	6%
Population (000's)	812	795	2%

Source: Winnipeg Police Service

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**CONCLUSION /
VISION**

THINK BIG, FRUGALLY, INVENTIVELY

THINK WINNIPEG

Amazon has become a global leader in online retailing, cloud computing, artificial intelligence and more because you are unafraid to commit to a good idea.

Winnipeg is your next big, good idea. We have a central location that will benefit your operations in numerous ways. We have the talent (and access to much more). It will be hard for you to find a lower cost city in which to do business. And your people will have a higher quality of life here than in just about any other major city in North America.

In short, we have an intelligent, low cost, low stress environment where your people can keep dreaming up great products.

We are ready for Amazon. Come find out why they call us Friendly Manitoba. We promise you will like what you find.



Sincerely, Team Manitoba



Prepared by:

