

### **READY FOR YOU!**







Calgary is ranked 5th most liveable city in the world with perfect scores in Stability, Health Care, Education and Infrastructure

#### WHAT WE'RE DOING:

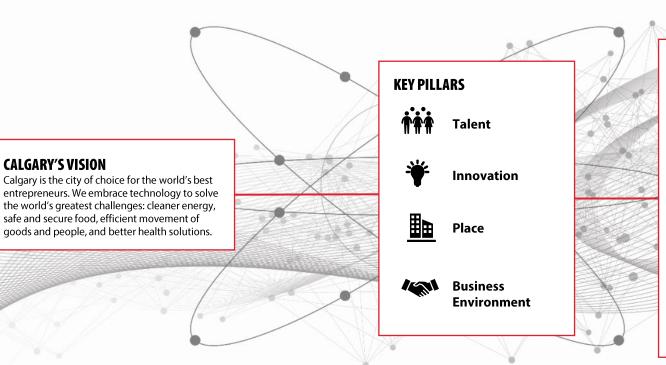
# DESTROYING CURRENT PERCEPTION



#### **CALGARY IN THE NEW ECONOMY**

**CALGARY'S VISION** 

### **ALIGNING OUR VISION**



#### **\$20B DIGITAL** TRANSFORMATION

By end of 2024, digital spend in Alberta is expected to reach \$20B across industries

**Transportation & Logistics** 

**Agribusiness** 

**Energy** 

**Tourism** 

**Creative Industries** 

Life Sciences/Health

**Financial Services** 



### **CALGARY'S KEY SECTORS**

#### **AGRIBUSINESS**

World-class industry leaders in crop science

#### **ENERGY**

Energy epicenter of Canada

#### **LIFE SCIENCES**

1st province to institute a province-wide electronic health record system

#### **TRANSPORTATION & LOGISTICS**

Western Canada's inland port

#### **AEROSPACE & DEFENSE**

Emerging centre for R&D and unmanned systems

#### **FINANCIAL SERVICES**

Strength in cybersecurity, wealth mgmt. & core banking

#### **INTERACTIVE DIGITAL MEDIA**

Entrepreneurial creative technology solutions

#### **CREATIVE INDUSTRIES**

Award-winning talent, crews, world-renowned locations and a purpose-built film studio



### **AGRIBUSINESS**

With direct access to a strong agricultural base, Calgary and Southern Alberta is a well-connected region with clear collaboration across geographic areas, industries, and research and training institutions. We have experts in all things ag – including primary production, protein development, agtech innovation, and food safety and traceability, making this a hotspot for Canadian and global food suppliers.

#### **CALGARY & SOUTHERN ALBERTA**

### A HUB FOR AGRIBUSINESS

#### **FOCUS AREAS**

- ✓ Value added food processing & production
- ✓ Protein development
- ✓ Agtech innovation
- ✓ Food safety and traceability

#### **SAMPLE COMPANIES**









PROVISION ANALYTICS





#### **VALUE PROPOSITION**

- Major city with multi-modal direct access to large-scale agricultural operations
- Critical mass of anchor companies call Calgary home
- Access to top talent in Canada for ag with more than 22 facilities in Alberta playing an important role in ag research and innovation
- Calgary-Olds Smart Agrifood Corridor 2,000 acre SmartFarm to improve ag productivity and efficiently use resources





### **ENERGY**

Calgary has long been known as an energy city and today is being recognized as a leader in the global energy transition. Alberta is Canada's largest oil and natural gas producer. The province also boasts some of Canada's best wind, solar, bioenergy and geothermal resources.



#### **CALGARY IS THE**

## ENERGY EPICENTER OF CANADA

#### **FOCUS AREAS**

- ✓ Digital Transformation
- ✓ Emissions Reduction
- ✓ Clean Technology
- ✓ Renewable Energy

#### **SAMPLE COMPANIES**













#### **VALUE PROPOSITION**

- Exceptional natural resources oil and gas, solar, wind, geothermal
- Calgary was ranked one of the world's top 15 cleantech ecosystems
- High concentration of experienced engineers with deep industry knowledge

#### **LED BY THE CITY OF CALGARY**

### **KEY SUSTAINABILITY INITIATIVES**

Project	Project Description	Project Completion
Distributed Solar Portfolio	The 6,228 kW of solar PV generation capacity deployed to date is spread across a portfolio of 20+ sites, with a majority of generation capacity located at our 5 largest projects, implemented over the last 5 years. The target is to develop 2,000 kW of additional capacity by 2023.	Ongoing
Distributed Cogeneration Portfolio	Cogeneration works by capturing that otherwise wasted heat and repurposing it to produce more electricity, heat utility fluids, or heat the air inside buildings. As a result, power plants that make use of cogeneration can operate with as much as 50-70 percent higher energy efficiency. The City has over 3 MW of cogeneration systems installed at transit maintenance facilities and recreation centres.	Ongoing
eTRANSIT Electric Bus Pilot	Calgary Transit is preparing to deploy over 10 electric shuttle buses on Calgary's roads by 2022	Ongoing
District Energy (DE) Connections	DE connections have now been completed to the Municipal Building, the New Central Library, Alberta Trade Centre, and the National Music Centre.	Ongoing
Cycle Tracks	Cycle tracks create a safer space for everyone and make sharing the road a more comfortable. It provides a predictable space and minimizes potential conflicts between people who walk, cycle, and drive.	Ongoing
Electric Vehicles	The Electric Vehicle (EV) Strategy aims to support faster adoption of EVs in Calgary. Currently, Calgary has almost 200 EV charging stations with more planned.	Ongoing

Sources: City of Calgary, 2020



### LIFE SCIENCES

Calgary is home to a vibrant life sciences sector that has been gaining increasing momentum for the past 5 years, spear headed by University of Calgary's efforts in becoming one of Canada's top research universities. Calgary has research and clinical expertise and a critical mass of companies leading the development of innovations that are solving critical health challenges.



#### **CALGARY HAS**

### **DEVELOPING LIFE-SAVING SOLUTIONS**

#### **FOCUS AREAS**

- ✓ Diagnostics
- ✓ Microbiome
- ✓ Oncology

- ✓ Digital Health
- ✓ Brain & Mental Health

#### **SAMPLE COMPANIES**















#### **VALUE PROPOSITION**

- **Alberta Advantage** Home to Canada's only province-wide, fully integrated, healthcare system resulting in a unique, single window for data and patient access
- World Class Assets International Microbiome Centre, Ward of the 21st Century, Alberta Precision Exchange, and Canadas largest cancer centre (2023) to name a few
- **Vibrant Ecosystem** Life Sciences Innovation Hub supports commercially-viable products and services get to market, by providing access to infrastructure, expertise, and startup services
- Momentum Over \$1 Billion raised by Alberta-based life science companies in 2019

The bioeconomy also supports innovation in other sectors like energy, agriculture, and manufacturing



### TRANSPORTATION & LOGISTICS

With air, rail and ground access connecting the city to millions of customers, Calgary is Western Canada's inland port. Calgary sits at the epicenter of major east/west/north/south highway routes, connecting eastern and western via the TransCanada Highway while northern Canada connects to the United States and Mexico via the CANAMEX corridor.

#### **CALGARY IS**

# WESTERN CANADA'S DISTRIBUTION HUB

#### **FOCUS AREAS**

- ✓ Consumer packaged goods
- ✓ E-commerce
- ✓ Carsharing services
- ✓ Ultra low-cost carriers

#### **SAMPLE COMPANIES**















#### **VALUE PROPOSITION**

- Multimodal Market Access Reach 11 million customers in a typical truck scheduled day, and via air YYC connects to 140 destinations with 85+ direct passenger and cargo routes to Asia, Europe and the Americas
- Calgary offers the quickest and has the lowest overall cost of operations relative to other regional logistics hubs due to low inbound transportation costs
- Calgary is home to an all-in-one, 3D robotics-based fulfillment system that transforms aisles and rows into a single storage and retrieval structure





### **AEROSPACE & DEFENSE**

As home to one of the country's busiest airports and one of Canada's major airlines, Calgary has solidified its place as an aviation hub. But the city is also emerging as a centre for excellence and innovation in the global aerospace industry. With a skilled workforce and a network of research institutes, Calgary companies are commercializing the latest in aerospace technology.



#### **CALGARY IS AN**

### **EMERGING CENTRE FOR R&D IN AEROSPACE**

#### **FOCUS AREAS**

- ✓ Remotely piloted aircraft and systems (RPAS)
- ✓ Maintenance, repair & overhaul (MRO)
- ✓ Aerospace & defense equipment, components & parts manufacturing

#### **SAMPLE COMPANIES**















#### **VALUE PROPOSITION**

- Robust engineering capabilities that can serve avionics and advanced manufacturing
- Test sites in Alberta Foremost (for Beyond Visual Line of Site Testing), Suffield (for Defense Research & Development)
- Calgary as a Living Lab Using city-owned assets and infrastructure for companies to develop, test and validate their technology in real-world conditions
- Strong pool of talent with expertise in remote sensing, geospatial technologies, data analysis, data visualization and systems integration
- Multinational defense contractors call Calgary home



### FINANCIAL SERVICES

Calgary is an attractive market for firms in the financial services sector due to the concentration of capital-intensive companies, high-deal velocity, large deal size, foreign investments and individual wealth. The strength of the sector has been a catalyst for the growth of fintech firms in the city with expertise in blockchain, cryptocurrency, insurtech, paytech, capital markets and investments, personal finance, and tech and software.



#### **CALGARY IS A**

### **GLOBAL FINANCIAL CENTRE**

#### **FOCUS AREAS**

- ✓ Fintech
- ✓ Cyber security
- ✓ Wealth management
- ✓ Blockchain

#### **SAMPLE COMPANIES**



















#### **VALUE PROPOSITION**

- Large pool of talent in the areas of financial services, cyber security, wealth management, and customer service
- With the highest concentration of head offices per capita in Canada, core banking originates at a firm's head office
- Calgarians have the highest personal income and Calgary has the highest number of millionaires per capita in Canada
- Fintech companies are first movers in Canada—biometric banking, sending real-time payment using blockchain, home to 1 of 6 horizontal payment facilitators in the world



### INTERACTIVE DIGITAL MEDIA

Low operating costs and accessible space, mixed with the right talent and an unmatched quality of life is why Calgary is home to a significant number of entrepreneurs focused on developing creative technology solutions across all industries. Watch our video, *Calgary. Hardwired for Creativity*.



**CALGARY IS** 

### **GROWING IN VIDEO GAMES &** IMMERSIVE TECHNOLOGY

#### **FOCUS AREAS**

- ✓ AR/VR and immersive tech services
- ✓ Game development
- ✓ Advanced technology hardware and services

#### **SAMPLE COMPANIES**



















- 60+ companies work on video games and/or immersive media products and services
- 70% of interactive digital media companies reported growth in the next 6 months
- Unity developers –delivering a significant supply of talent
- Thin Air Games will provide support, funding and expertise needed for 50 new gaming ventures to successfully build and launch their projects over the next 5 years
- Calgary Game Developers Association will help you build your workforce (programmers, artists, sound designers, writers) and acquire the expertise you need
- Active streamers Calgary's Twitch community of members and streamers is one of the most active networks in Canada



### **CREATIVE INDUSTRIES**

Calgary is home to award-winning talent and crews, world-renowned locations and a purpose-built film studio. The Calgary Film Centre is a world-class facility suitably equipped and serviced so you can tell your story with ease. Conveniently located 25 minutes from the Calgary airport and 20 minutes from downtown, and has 50,000 square feet of purpose-built studios and 25,000 square feet of multipurpose warehouse and workshop spaces



#### **CALGARY HAS A**

### **WORLD-CLASS PURPOSE-BUILT FILM STUDIO**

#### **FOCUS AREAS**

- ✓ Hollywood feature film
- ✓ OTT streaming networks
- ✓ Canadian & international production companies
- ✓ Commercial production agencies

#### **VALUE PROPOSITION**

- Infrastructure Calgary Film Centre
- Award-winning crews and talent
- Globally competitive incentives
- Globally competitive low cost of doing business
- High quality of life
- Accessible and affordable office space, utility costs, low rental rates

#### **SAMPLE FILM & TV**















**KUDOS** 











#### **ALBERTA, RESEARCH EXPERTISE IN**

### ARTIFICIAL INTELLIGENCE & MACHINE LEARNING



#### **UNIVERSITY OF ALBERTA**

In the Faculty of Science, the studies of AI and machine learning can be most efficiently explored in the Computing Science department. Students can take a Bachelor of Science (BSc) and major or minor in computing science, and for those students who want a more hyper-focused experience, UofA also offers specialization and honors computing science programs.



### ALBERTA MACHINE INTELLIGENCE INSTITUTE (Amii)

Amii is one of the world's Top 5 Al and ML research institute. With 20 researchers and fellows, they collaborate with businesses to push the boundaries of Al & ML applications.

- ✓ 100+ MSc, PhD & Post-Docs
- √ 30+ industry members
- ✓ 200+ publications



### IL ALTAML AI/ML CENTRE OF EXCELLENCE

Creation of applied data science internships over 3-years in Calgary to accelerate Machine Learning and Artificial Intelligence (AI/ML) skills development through hands-on, paid, mentored work experience for up to 240 individuals with STEM qualifications.

University of Alberta's artificial intelligence research is ranked 2<sup>nd</sup> in the US and Canada

#### Al Research Labs in Alberta

















#### **ALBERTA, A LEADER IN**

### **QUANTUM COMPUTING**



### INSTITUTE FOR QUANTUM SCIENCE & TECHNOLOGY

A multidisciplinary group of researchers in the areas of Computer Science, Mathematics, Chemistry, and Physics. Research groups include:

- Quantum optics from spectroscopy to manipulating quantum information encoded in atoms
- Molecular modeling developing methods to calculate the properties of complex molecules
- Nanotechnology new functional materials and devices based on nanostructures spurs
- Quantum information & computing revolutionizing how we handle, transmit, and store quantum information

In 2018, the Quantum technology dream team receive \$5.8M in research funding.



#### **ALBERTA INNOVATES**

The Alberta Government is also supporting quantum technologies research and development through strategic research project grants, which support priority-driven research and innovation at Campus Alberta post-secondary institutions.

Alberta Innovates currently has four quantum projects underway (approx. value of \$3.6 million):

- 1. Connecting diamond photonics to highquality qubits and fibre-optics networks
- Accelerate deployment of quantum technologies
- A wavelength interrogation instrument for fibre-sensor-based pipeline-leak detection
- 4. Microwave quantum memories



#### **QUANTUM ALBERTA**

A consortium from the

Universities of Alberta, Calgary and Lethbridge and in industry of 33 faculty members, 28 postdoctoral researchers and 135 graduate students undertaking quantum research and development.

#### Research themes include:

- Quantum chemistry and multi-scale modelling
- 2. Quantum foundations and quantum gravity
- 3. Quantum materials
- Quantum nanoscience and technology
- 5. Quantum optics and quantum information

The world's fastest and most efficient supercomputers integrate technology were developed by <u>University of Alberta</u> computing scientists. The two supercomputers are made up of 4,000 nodes each.

#### FORECASTED DIGITAL TRANSFORMATION SPEND - 1 of 2

### \$7.5B IN CALGARY AND \$20B IN ALBERTA BY 2024

### ENERGY AND ENVIRONMENT

CALGARY: \$2.3 B

ALBERTA: \$5.8 B

**12% CAGR** 

Alberta's National Share: 22%

#### **OIL AND GAS**

CALGARY: \$1.3 B

ALBERTA: \$2.5 B

**15% CAGR** 

Alberta's National Share: 43%

### TRANSPORTATION AND LOGISTICS

CALGARY: \$790 M

ALBERTA: \$1.6 B

**12% CAGR** 

Alberta's National Share: 11%

#### AEROSPACE AND DEFENSE

CALGARY: \$38 M

ALBERTA: \$54M

**12% CAGR** 

Alberta's National Share: 6%

### CREATIVE INDUSTRIES

CALGARY: \$566 M

ALBERTA: \$1.3B

**13% CAGR** 

Alberta's National Share:

#### LIFE SCIENCES/ HEALTH

CALGARY: \$428 M

ALBERTA: \$1.3 B

**12% CAGR** 

Alberta's National Share: 10%

#### MANUFACTURING

CALGARY: \$259 M

ALBERTA: \$737 M

13% CAGR

Alberta's National
Share:
6%

#### FORECASTED DIGITAL TRANSFORMATION SPEND - 2 of 2

### \$7.5B IN CALGARY AND \$20B IN ALBERTA BY 2024

**AGRIBUSINESS** 

CALGARY: \$246 M

ALBERTA: \$684M

13% CAGR

Alberta's National Share: 10% FINANCIAL SERVICES

CALGARY: \$609 M

ALBERTA: \$1.5 B

**11% CAGR** 

Alberta's National Share: 8% **RETAIL** 

CALGARY: \$533 M

ALBERTA: \$1.5 B

**13% CAGR** 

Alberta's National Share: 14% TOURISM AND RECREATION

CALGARY: \$27 M

ALBERTA: \$105 M

**13% CAGR** 

Alberta's National Share: 13%

#### THE WORLD IS

### **INVESTING IN CALGARY**



UK-based Hg purchased control of Benevity, a Calgary-based corporate social responsibility platform, bringing the Calgary company's valuation to more than \$1 billion USD.



Canada's oldest retailer is teaming up with one of the country's newest financial technology companies to offer a new credit card. Neo Financial replaces Capital One as lead credit card for Hudson's Bay.



Symend, a customer engagement platform for financially at-risk customers, to accelerate global expansion by brining total funding to date to over US\$100M following US\$43M Series B extension.



#### **CALGARY IS**

# FOR DECISION MAKERS

#### 118

Head offices in Calgary

#### **HIGHEST**

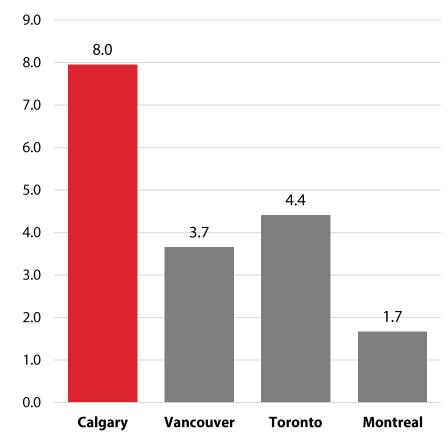
Concentration of head offices in Canada per capita

#### **DIVERSE SECTORS**

Energy, Creative Industries, Technology, Transportation & Logistics, Agribusiness, Film & TV, Financial Services, Aerospace & Defense, and Life Sciences

Sources: Financial Post 500 Database (2019), Statistics Canada (2018)

#### **Head Office per Capita Across Canada**



Sources: FP500 2019 Database; Statistics Canada, 2019



#### TALENT RETENTION — LOCAL

### **ACROSS THE TALENT ECOSYSTEM**



**University of Calgary** 

Mount Royal University

SAIT

**Bow Valley College** 

St. Mary's University

**Ambrose University** 

### UPSKILLING ORGANIZATIONS

EDGE UP

Lighthouse Labs

NPower

ThinAirLabs/ EvolveU

ComIT

InnoTech College

Launchpad

### MMIGDATI

### IMMIGRATION SERVICES

Immigration, Refugees, & Citizenship Canada (IRCC)

Employment & Social Development Canada (ESDC)

Global Talent Stream Trilateral Referrals

> Global Talent Accelerator

### TTI EMEI

### SETTLEMENT SERVICES

Calgary Region Immigrant Employment Council

Immigration Services Calgary

**Newcomers Centre** 



### RECRUITMENT FIRMS

BOWEN Group

Boyden

Randstad

**Robert Half** 

TeamIT

**WCG Services** 

VanHack



#### **FUNDERS**

Alberta Innovates

BioTalent Canada

EcoCanada

ITAC Talent

Industrial Research Assistants Program (IRAP)



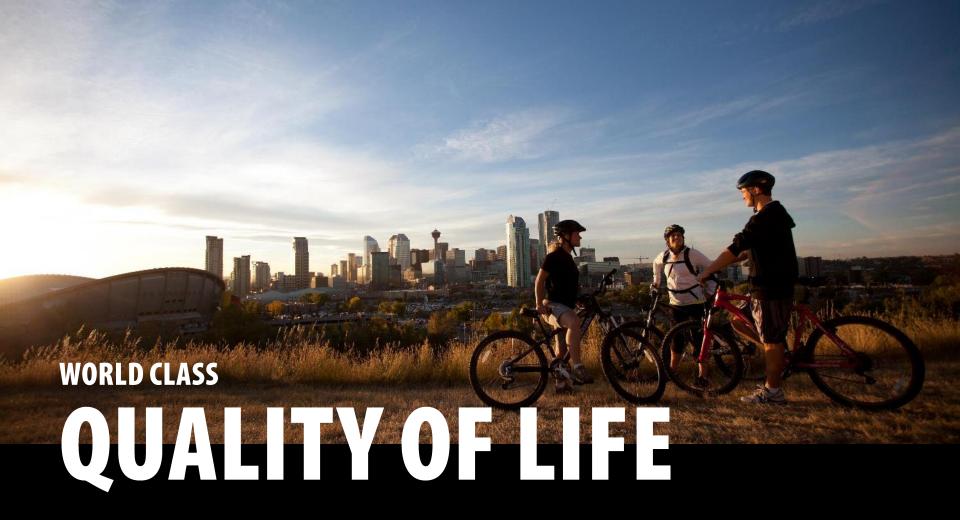
#### **OTHER SERVICES**

Information & Communications Technology Council (ICTC)

**HR Tech Group** 

PEO Canada

	Virtual Career Fairs	Tech Talent Roundtables	
Post-Secondary Institutions		Talent Branding Opportunities	
Townhalls	TALENT	Webinars	
Ecosystem Connections			Global Talent Stream
	Talent Data	Pathways to Talent	



#### YOUR EMPLOYEES CAN HAVE THE

### HIGHEST QUALITY OF LIFE

	Calgary	Vancouver	Toronto	San Francisco	New York
Purchasing Power Index	Very High	Moderate	Moderate	Very High	High
Safety Index	High	High	High	Moderate	Moderate
Health Care Index	High	High	High	High	High
Climate Index	Moderate	Very High	High	Very High	High
Cost of Living Index	Moderate	Moderate	Moderate	High	High
Property Price to Income Ratio	Very Low	High	High	Low	Moderate
Traffic Commute Time Index	Low	Moderate	Moderate	High	Moderate
Pollution Index	Low	Low	Low	Moderate	Moderate
Total Quality of Life Index	175.9	172.0	146.7	161.1	139.4

#### **YOU CAN**

### AFFORD TO LIVE

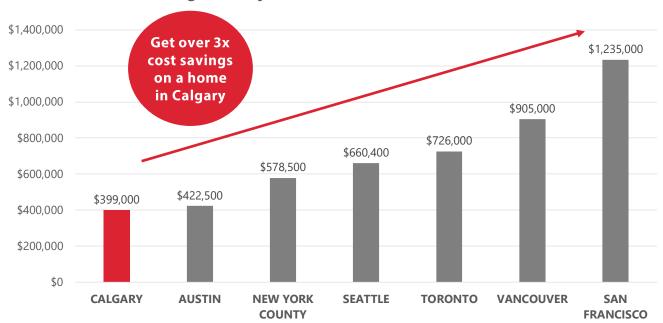
Vancouver **Toronto** 4.2% **1** than Calgary 10.9% **Consumer Prices** 24.8% **†** than Calgary 28.6% **Consumer Prices (incl. Rent)** 79.8% 1 than Calgary 76.1% **Rent Prices** 0.8% **1** than Calgary 8.7% **Restaurant Prices** 14.7% **1** than Calgary 15.3% **Groceries Prices** 29.7% I than Calgary 38.9% **Local Purchasing Power** 

Local Purchasing
Power shows the
relative cost to live
based on average
wages. Calgary
has the better
purchasing
power.

#### **YOUR EMPLOYEES CAN**

### **AFFORD TO BUY A HOME**

#### **Single Family Detached Median Home Price**





#### **WE HAVE**

### LOW TAXES

Alberta's
corporate tax
rate will be
reduced to 8%
by 2022, making
it the lowest in
Canada

#### **4TH LOWEST GLOBALLY**

Calgary's total effective tax rate is the 4<sup>th</sup> lowest among 111 global cities, lower than:

- Toronto
- Vancouver
- San Francisco and
- Seattle

#### **NO PROVINCIAL SALES TAX**

Unlike BC (7%) and Ontario (8%), Alberta does not have a provincial sales tax

#### NO PAYROLL TAX OR HEALTH CARE PREMIUMS

Sources: KPMG Competitive Alternatives: Focus on Tax Report (2016)

# CELEBRATING DIVERSITY

#### 120+ LANGUAGES SPOKEN

Top 5 non-English languages spoken in Calgary include Tagalog, Punjabi, Cantonese, Mandarin, Spanish

#### 3RD MOST DIVERSE CITY IN CANADA

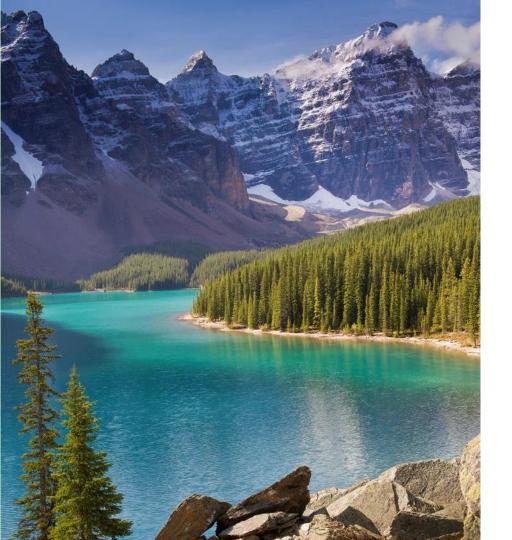
Calgary is Canada's 4<sup>th</sup> largest city with 1.47 million people, and 33.7% of its population are visible minorities

#### 240+ ETHNIC ORIGINS

Calgary is home to more than 240 different ethnic origins, and over the last 5 years, 54% of people moving to Calgary where of international origin

Sources: Calgary CMA, Census 2016, Statistics Canada; Calgary CMA, Statistics Canada, July 2019





#### **CALGARY OFFERS**

### **QUALITY OF LIFE**

#### **BANFF AND ROCKY MOUNTAINS**

- 1 hour drive to hike or camp in the Rockies
- Proposed passenger train from YYC Airport Downtown Calgary – Banff

#### **10 SKI RESORTS**

Within 3 hours of Calgary plus thousands of hectares of back-country terrain to ski and toboggan

#### LARGEST BIKE PATH IN NORTH AMERICA

Ride a bike or scooter along Calgary's urban bike path, the largest in North America (680 miles/1,096 km)

#### **SUNNIEST CITY IN CANADA**

With an average 333 days of sunshine in a year, enjoy rafting or kayaking along the Bow river

#### **WE'RE ACTIVE & CREATIVE**

### LIFE IN CALGARY

**SPORTS** – Enjoy recreational activities at one Calgary's family-friendly 13 athletic parks, 12 arenas, 19 indoor and 35+ outdoor rinks, 14 leisure centres, 7 municipal golf courses

ARTS & CULTURE – Watch live performances of theatre, opera, ballet, other performing arts at Southern Alberta Jubilee Auditorium, Bell Studio, Theatre Calgary, Alberta Ballet, and more

#### **WORLD-CLASS ATTRACTIONS**

- Calgary Stampede Annual 10-day exhibition, rodeo & festival held every July
- Canada Olympic Park Ski, snowboard and skate during the winter season and zipline, karting and mountain biking during the summer
- Calgary Zoo Canada's most visited zoo & recognized for conservation research
- Spruce Meadows International premier equestrian centre





#### **CALGARY OFFERS**

### **URBAN MOBILITY**

#### **TRAIN**

Public train in downtown Calgary is free, and 44% of workers downtown take the train to work

#### **BUS**

Over 160 bus routes including express bus routes

#### **BIKE**

40,000 Calgarians ride their bike to work, and Lime bike is offered downtown and surrounding areas

#### **E-SCOOTERS – 750,000 TRIPS+ IN 2019**

Since mid-July, Calgary's 1,500 e-scooters have ferried 165,000 unique users on nearly 750,000 trips, covering almost 1.4 million kilometres



THE CITY OF CHOICE FOR SMART PEOPLE TO EMBRACE ADVANCED TECHNOLOGY AND CREATE SOLUTIONS FOR SOME OF THE WORLD'S GREATEST CHALLENGES:

Cleaner energy, safer and secure food, safer movement of goods and people, and better health solutions.



#### THANK YOU.

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