

The Edmonton Metro's proximity to Alberta's oil reserves — the 3rd largest oil reserve in the world — has led to global investment and world-renowned innovation in the energy sector.



- Large pool of skilled technical talent
- Access to low cost reserves
- Robust, supporting infrastructure
- Access to global markets

## EDMONTON REGION: POWERING THE GLOBAL ECONOMY

Edmonton Region is Alberta's logistical and service hub for the energy sector, supported by a large skilled workforce, and extensive federal and provincial support

### ENERGY HIGHLIGHTS

- \$84b**  
Annual exports from Alberta
- 32,905**  
Workers in Edmonton Region
- 5,183**  
Establishments in Alberta



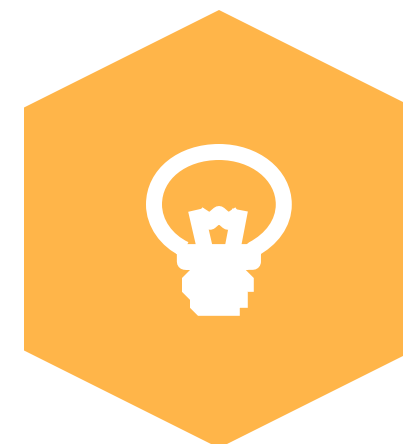
### MINERAL EXTRACTION

- In 2018, Alberta contributed 82% of all oil sand production in Canada
- Alberta accounts for greater than 50% of Canada's GDP in the mineral extraction sector



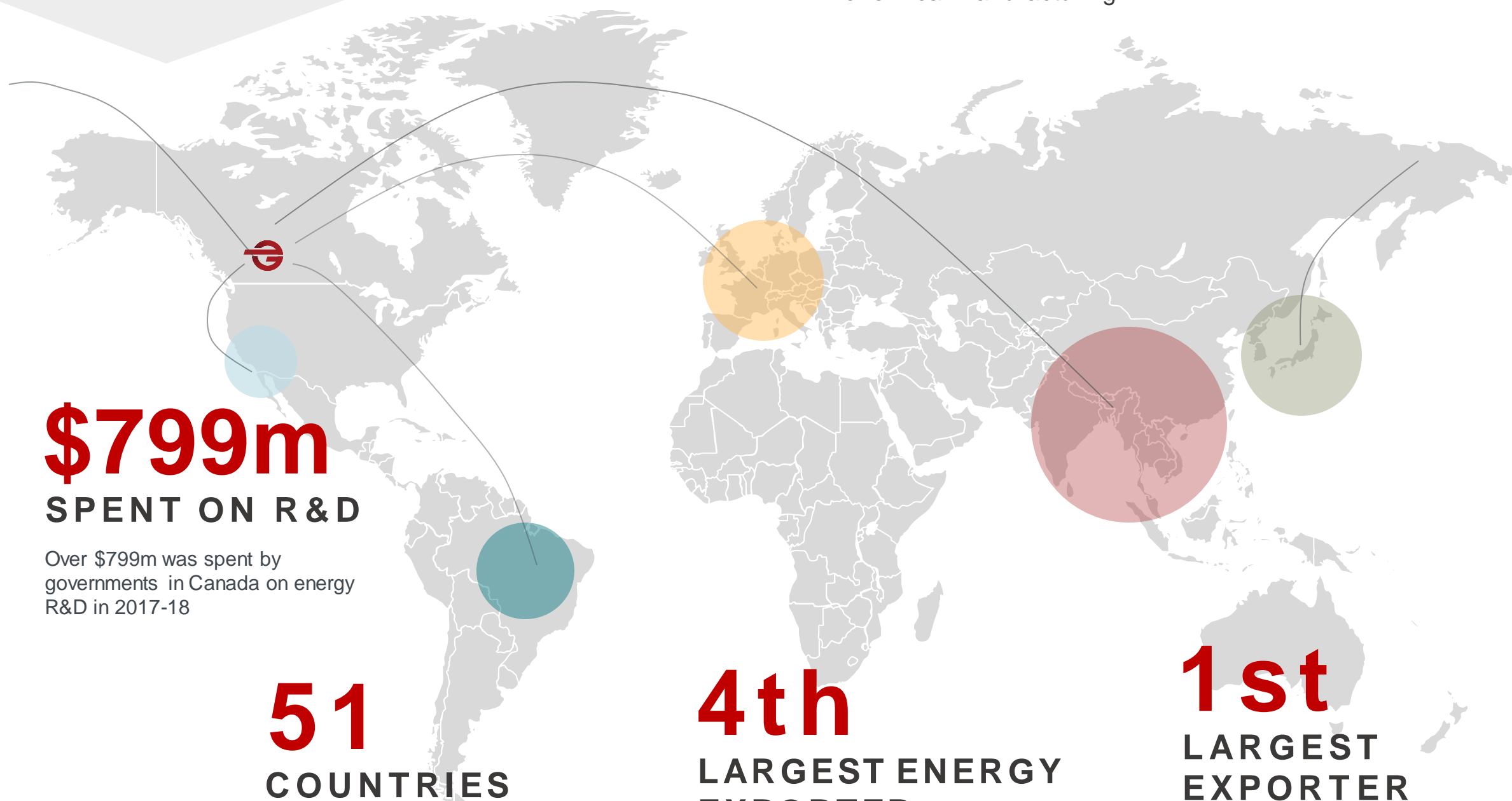
### MANUFACTURING

- Alberta's Industrial Heartland, in the Edmonton Region, is Canada's largest hydrocarbon processing cluster, with over 40 national and multinational companies, \$40 billion in operating investment and 43% of Canada's basic chemical manufacturing



### DISTRIBUTION

- Key pipeline infrastructure allows for connection and access to a 373,000km regional network. Other key assets include North West Refining and the concentration of oil refineries in Refinery Row



**\$799m**  
SPENT ON R&D

Over \$799m was spent by governments in Canada on energy R&D in 2017-18

**51**  
COUNTRIES

Preferred market access to 51 countries, representing approximately 1.5 billion consumers and over 67 per cent of global GDP

**4th**  
LARGEST ENERGY EXPORTER

In 2018, Canada was the fourth largest exporter of energy

**1st**  
LARGEST EXPORTER

Canada is the largest foreign supplier of crude oil to the US, making up 48% of total US crude imports

**UNIVERSITY OF ALBERTA**  
FUTURE ENERGY SYSTEMS

**\$75m INVESTMENT**  
**1400+ PUBLICATIONS AND AWARDS**

## TALENT & EDUCATION

### UNIVERSITY OF ALBERTA

- Ranked 8th globally for energy research, UAlberta offers extensive programming related to the energy sector including in Engineering (Mining, Petroleum, Chemical, etc.), Environmental and Conservation Sciences, Geology, etc.
- Hosts the Institute of Oil Sands Innovation which **supports discovery and innovation** across a broad range of areas in oil sand mining and upgrading

### FUTURE ENERGY SYSTEMS

- Develops energy technologies of the future, integrates them into today's infrastructure, and explores economic, environmental, and social impacts

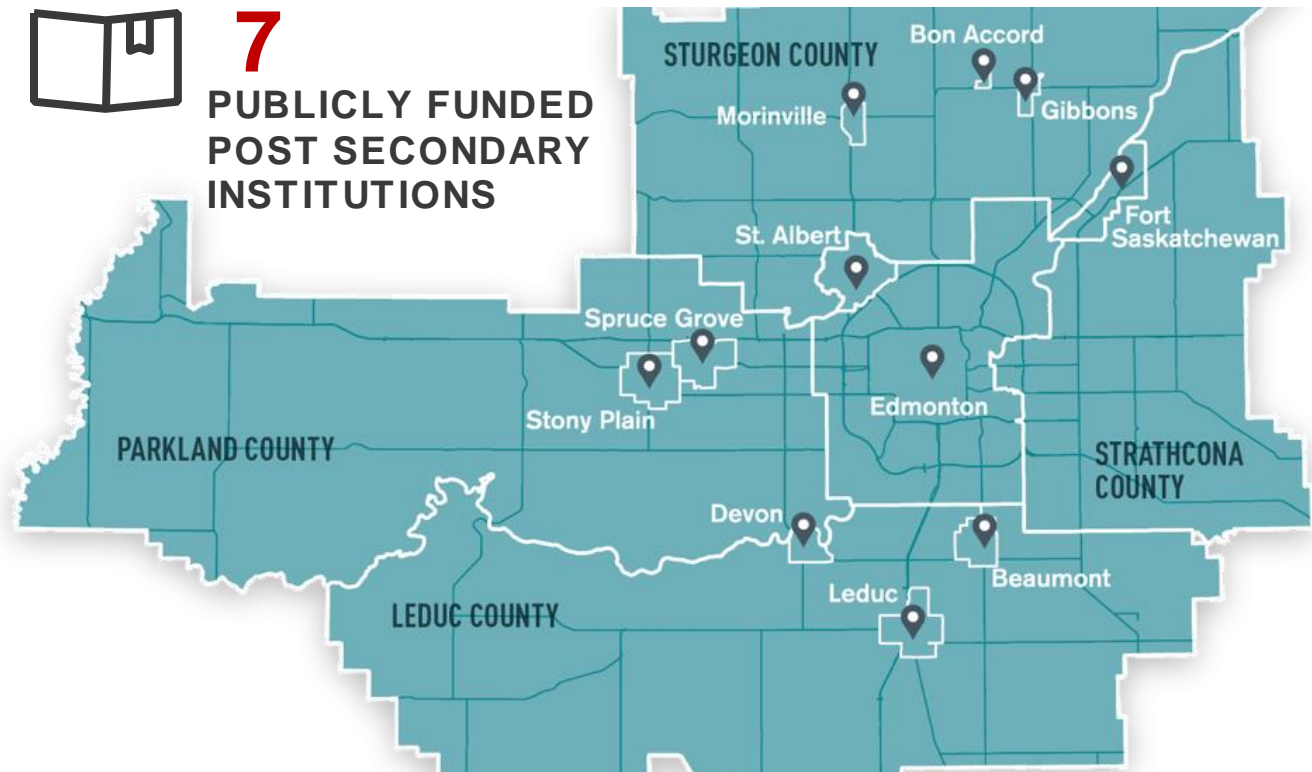
**Alberta's Industrial Heartland**  
Celebrating 20 Years **\$40b** IN CAPITAL INVESTMENT

Alberta's Industrial Heartland, located in the Edmonton Metro Region, is a concentration of world-class refining and processing operations. It is the largest hydrocarbon processing cluster in Canada and the center of petrochemical activity in Western Canada.

More than **40 national and multinational companies** operate in Alberta's Industrial Heartland, representing over **\$40 billion** in current capital investment. These operations are dynamic, innovative, and leading the way to a greener future.



**7**  
**PUBLICLY FUNDED POST SECONDARY INSTITUTIONS**



## INNOVATION ECOSYSTEM

### RESEARCH & DEVELOPMENT

- In 2017-18, **federal spending on R&D increased by 14% (\$67m)** boosted by increased energy efficiency and hydrocarbon spending including increases in carbon capture, utilization and storage

### SHELL CANADA ENERGY QUEST PROJECT

- World's first** commercial-scale carbon capture & storage (CCS) project to tackle carbon emissions related to oil sands operations
- Safely stores more than 1 million tonnes of CO<sup>2</sup> emissions annually



**\$11.2b**

**LESS TAXES PAID BY BUSINESSES THAN IN OTHER CANADIAN JURISDICTIONS**

## BUSINESS ENVIRONMENT

### COMPETITIVE TAX REGIME

- At 8%, Alberta currently has the **lowest corporate tax rate in Canada.**
- The value added tax (VAT) in Alberta is 5%, among the lowest rates across all of Canada

**Capital Power**

**Husky Energy**

**Imperial**

**Canadian Natural**

**ENBRIDGE**

**SUNCOR**  
ENERGY



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