

The Triangle Delivers.

HQ2 in the Research Triangle

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Dear Amazon,

Over the last sixty years, North Carolina's Research Triangle Region has garnered a reputation as a top place for business and living. And while we know you have a lot of options for your second headquarters, the Triangle offers many unique strategic advantages not found anywhere else.

Like Henry Ford once said, "If I had asked people what they wanted, they would've said a faster horse." Innovating on behalf of your customers requires a deep understanding of their needs, and delivering solutions that are leaps ahead of their expectations. That can lead you down some different paths and into uncharted territory.

As the world's most customer-centric company, you need to be in a place that enables you to operate efficiently and affordably, to explore narrow pathways in search of broad avenues, to embrace powerful trends quickly, to adapt. In short: you need to be able to keep doing what you do best.

The Research Triangle Region is that place. Our region has everything you're looking for, and a bit more: a community that's thinking long-term as we navigate our region's transformational growth; a community that's excited to welcome businesses like yours to help shape the future of our region; and a community that has invention and collaboration down to a science. We're excited to share our home with you.





Our Strengths

- **Peculiar talent.** The Research Triangle region is a “brainpower cluster” with one of the highest concentrations of educated talent in the country. Our universities are producing some of the best minds in business, technology and engineering.
- **A passion for invention & collaboration.** Bold ideas flourish here because no challenge goes unmet alone. Our community was built on partnerships between government, businesses, entrepreneurs, service providers, academia, big industry and non-profits.
- **An accessible & flexible business environment.** The Triangle is a stable place to do business, with low costs, a low-tax structure, and pro-business regulatory environment. Our region is also growing—fast. Companies that locate here are excited to play a key role in our community’s transformation, and we’d offer Amazon that opportunity as well.
- **A place your employees will love.** Every day, more and more people are moving to the Triangle seeking quality jobs, and a more balanced and affordable lifestyle—where housing is affordable, you can live close to work and not get stuck in traffic, and there’s always something to do, see, and be a part of.

The Research Triangle at a Glance

The Triangle is known for its caliber of talent, concentration of innovation, stable and affordable business climate, and vibrant communities.

Our region is anchored by three world-renowned research institutions and their accompanying metros: North Carolina State University in Raleigh, Duke University in Durham, and the University of North Carolina in Chapel Hill, along with the world's largest research park, Research Triangle Park.

It's an exciting time to be in the Triangle. According to the latest report from the U.S. Census Bureau, our region was the 14th fastest growing in the country, and the fastest growing region in North Carolina. With 1.86 million residents, and a population that's projected to grow 63.1% over the next 30 years—and 11% this year alone—you can bet that our region is in the midst of major transformation.

With big changes in population also comes a lot of new things that our community couldn't be more excited about: new neighbors, new developments, new businesses, new homes and schools, more activities and transportation options, and more opportunities for companies like Amazon.

Data presented in this proposal represents the combined Raleigh-Cary and Durham-Chapel Hill MSAs.

1,862,481
People

63.1%
Projected population
growth 2014 - 2044

3
Tier-1 Research
Institutions

371,351
Recent graduates with skills
relevant to Amazon jobs

1,005,521
Labor pool

10.2%
Change in population
2011 - 2016

47%
of residents with a
bachelor degree or higher

#2
Increase in millennial tech
talent (2010-2015)



1. Shaw University
2. Saint Augustine's University
3. William Peace University
4. Campbell University
5. North Carolina State University
6. Meredith College
7. UNC Chapel Hill
8. Duke University
9. NC Central University
10. Durham Technical CC
11. Wake Technical CC

- Colleges & Universities
- Community Colleges





Hire & Develop The Best

The Research Triangle is one of the most highly educated regions in the U.S., producing future innovators at our top-tier universities and attracting the best talent from all over the world. It's no wonder MetLife (pictured) chose to join tech giant SAS in Cary, NC for its Global Technology Campus.

The Triangle's Peculiar Talent

The Research Triangle's talent is peculiar in that we are disruptive, innovative and think big.

The Triangle is not afraid to be different or to be the first; we describe our workforce as having a restless attitude for innovation. It's why transformational products like the UPC bar code, IBM's Watson and even the female Viagra, Addyi, were created here.

Founded by three tier-one research universities, innovation is in our blood. But Duke, the University of North Carolina and North Carolina State University are just the beginning of our talent story.

North Carolina is home to 53 four-year colleges and universities and a 58 community college system

with 124 campuses that is the third largest in the country.

And if you need a workforce that knows how to put the customer first, an army of veterans stands ready to serve. In the next two years, the Triangle's workforce will grow by 78,000 young military veterans; 82 percent of them being 30 years old or younger.

47%
of residents over 25 have a bachelors degree or higher, making the Triangle one of the most educated regions in the country.

“

Establishing our 2nd largest operation in North Carolina has been a great decision. Access to a mature & diverse talent pool from entry level to experienced...has exceeded our expectations. This is complemented by an agile, innovative & collaborative business culture. It is truly an exceptional place to operate a global business.

– O'Hara Macken,
EVP & Chief Operating Officer, Ipreo

Topping Talent Charts

North Carolina, and specifically the Research Triangle region, has seen massive growth in technology employment. From 2011-2016, total tech employment grew 16.7%, making North Carolina #1 for tech employment growth against competitive metros.

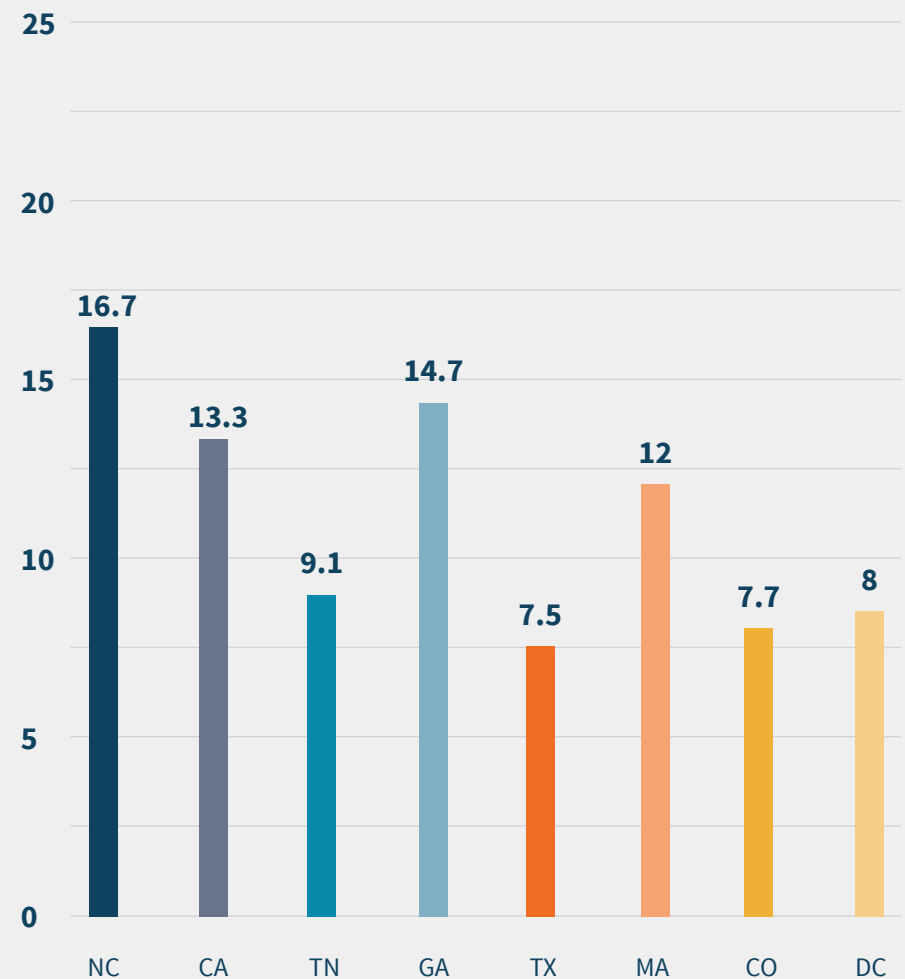
The Research Triangle Region has one of the highest concentrations of tech talent in the nation - spanning analytics, mobile applications, IOT, open source, healthcare, cloud computing, cyber security and fintech.

The Triangle's world-class talent has attracted companies from around the world. Thanks to the prevalence of technology across industry categories, you'll find software and systems engineers, data scientists and other tech workers at nearly every major company in the area.

In 2016, CBRE ranked the Research Triangle Region one of the top tech talent markets in the country, based on a combination of 13 metrics, including size of tech labor pool, educational attainment and millennial population growth.

% Change in Tech Industry Employment 2011 - 2016

Source: BLS



Testimonial

Jim Whitehurst

Jim Whitehurst is president and CEO of Red Hat, the world's leading provider of open source enterprise IT products and services. Whitehurst is an advocate for open software as a catalyst for business innovation.

There's so much that attracted Red Hat to North Carolina's Research Triangle that you can't easily find in other regions: a welcoming environment, beautiful weather, low cost of living, easy commutes, burgeoning culinary scene, top schools and universities, and the combination of established businesses and entrepreneurial energy.

Developing an environment where innovators and entrepreneurs can thrive is a key part of building a robust business ecosystem, because they generate new ideas, challenge the status quo, and create new job opportunities for local residents.

One of the best things about the Triangle is the tremendous support and enthusiasm from the local community -- from universities to businesses to government to nonprofit organizations -- for cultivating that entrepreneurial spirit. In fact, in 2016, Raleigh ranked as the fourth best city in the country for fostering entrepreneurial growth.

We see the Triangle as a strategic advantage because it helps us attract the best and the brightest. The talent pool in the area is second to none. We are lucky to have a robust college and university system - including North Carolina State University, University of North Carolina at Chapel Hill, and Duke University all in the vicinity - which keeps young minds flowing into the talent pool every year.

In addition, with so many larger companies already located here and more global brands relocating to the area every year, we see more experienced professionals flocking to the area as well.

Having our headquarters in downtown Raleigh is an exciting place to be and it's a place that our younger, creative workforce wants to work and live. On the other end, for our associates with families and kids, it's a great place to be because of the strong school systems and easy commute to the office from surrounding communities. When

you put all that together, you can see why it's easy for us to attract people across a spectrum of demographics.

The Triangle is growing at an astonishing rate. Thinking about when we first moved to our downtown Raleigh headquarters from the North Carolina State University campus in 2012, the city landscape has grown up around us. Everywhere you look there's a new building, store, or restaurant. You can feel the momentum walking down the street, and I feel it most when talking to other business leaders who are looking to locate a business here.

Despite all the growth, I see it as a market that hasn't even scratched the surface of its potential. Red Hat was started in this area, we've grown up in the Triangle, and we're looking forward to seeing where the region will go next. Hope you will consider joining all the fun and pick the Triangle.



Extraordinary Institutions

Duke University (Duke) - Durham, NC

Duke is considered one of the best universities in the world by numerous rankings. Duke's Pratt School of Engineering is quickly rising to be one of the top undergraduate and graduate engineering schools in the country and the Fuqua School of Business is the 3rd ranked business school in the United States by Bloomberg BusinessWeek.

Relevant degree programs: Law, Business Administration, Computer Science, Electrical & Computer Engineering, Statistics, Finance, Management

North Carolina State University (NCSU) - Raleigh, NC

NC State has the fourth-largest undergraduate engineering program in the country. NC State is also home to one of the first computer science programs in the United States, one of the top advanced analytics programs, and the nation's first

Master of Science in Analytics. Relevant degree programs: Business Administration, Accounting, Computer Engineering, Computer Science, Economics, Electrical Engineering, Industrial Engineering, Mechatronics Engineering, Mathematics & Applied Mathematics, Statistics, Graphic Design

UNC-Chapel Hill (UNC-CH) - Chapel Hill, NC

The nation's first public university, the University of North Carolina at Chapel Hill was ranked third among U.S. public universities by the Wall Street Journal based on graduate success and student learning. Additionally, UNC's Kenan Flagler Business School is consistently ranked as one of the top undergraduate and MBA programs in the country.

Relevant degree programs: Law, Business Administration, Computer Science, Statistics & Analytics, Operations Research, Information Science, Accounting

North Carolina Central University (NCCU) - Durham, NC

Founded in 1909, NC Central was the first public liberal arts institutions for African Americans in the nation. Today, NC Central is a master's comprehensive institution that offers bachelors and master's degrees, a Juris Doctor and a Ph.D. in Integrated Biosciences to a diverse student population.

Relevant Degree Programs: Law, Accounting, Computer Science, Information Science, Computational & Engineering Mathematics, Physics & Electrical Engineering, Business Administration

Meredith College (Meredith) - Raleigh, NC

Meredith College is a women's liberal arts college and co-educational graduate school. With 2,000 women in its undergraduate program, Meredith is the largest college for undergraduate women in the Southeastern United States.

Relevant Degree Programs: Law, Accounting, Computer Science, Information Science, Computational & Engineering Mathematics, Physics & Electrical Engineering, Business Administration

With over 570,000 students enrolled in higher education across the state, an estimated 53,000 graduates enter North Carolina's workforce each year.

North Carolina Agricultural & Technical State University (NC A&T) – Greensboro, NC

Located just an hour away, North Carolina A&T is the nation's largest historically black university, with over 11,000 undergraduate and graduate students enrolled each year. NC A&T's engineering school, with 1,700 undergraduate and graduate students, produces the highest number of black engineers in the United States.

Relevant degree programs: Business Administration, Accounting, Management, Marketing, Finance, Computer Science, Computer Engineering, Electrical Engineering, Industrial & Systems Engineering, Applied Engineering Technology, Electronics Technology, Graphic Communication Systems, Instructional Technology

William Peace University (Peace) – Raleigh, NC

A small liberal arts college founded in 1857 and located in downtown Raleigh, NC, Peace students enjoy

a 15:1 student to faculty ratio while pursuing any of 26 majors.

Relevant Degree Programs: Business Administration, Business Analytics, Pre-Law, Simulation & Game Design

Shaw University – Raleigh, NC

Founded in 1865 in downtown Raleigh, Shaw University was the South's first historically black university.

Relevant Degree Programs: Business & Public Administration, Computer & Information Science, Accounting

St. Augustine's University – Raleigh, NC

Saint Augustine's University is a liberal arts university and HBCU offering more than 25 undergraduate degree programs.

Relevant Degree Programs: Business, Accounting, Computer Information Systems, Engineering Mathematics

Campbell University – Raleigh / Buies Creek, NC

Campbell offers degree programs in business, law, pharmacy and medicine from its campuses in Buies Creek, NC and downtown Raleigh, NC.

Relevant Degree Programs: Law, Information Technology & Security, Mathematics, Accounting, Business Administration

Durham Technical Community College (Durham Tech) – Durham, NC

Relevant Degree Programs: Computer Integrated Machining, Electrical Systems Technology, Electronics Engineering Technology, Accounting, Business Administration, IT, Software Development, Web Development Network Security, IT & Cloud Systems Administration

Wake Technical Community College (Wake Tech) - Raleigh, NC

Wake Tech is North Carolina's largest community college. With five






campuses and three training centers, Wake Tech offers more than 200 associate's degrees, diplomas, and certificates that prepare students for university transfer or immediate employment. In 2013, Wake Tech partnered with SAS and IBM to offer the first and only Associates Degree in Business Analytics.







Relevant degree programs: Business Analytics, Electronics Engineering Technology, Accounting, Business Administration, Computer Engineering, Computer Programming & Development, Data Science & Programming Support, Mobile Applications Developer, Network Management, Software and Web Development, Technical Support

Central Carolina Community College (CCCC) – Pittsboro, NC

Relevant Degree Programs: Sustainability Technologies, Accounting, Business Administration, Computer Engineering Technology, Electronics Engineering Technology, IT, Network Management

It's easy to find top talent for Amazon's Triangle HQ2

Role	Software Developers	Operations, IT & Support Engineering	Business Intelligence	Project Managers	Systems, Quality, & Security Engineers
					
Graduates from	NCSU, Duke, NC A&T, UNC-CH, Meredith, NCCU, Wake Tech, Durham Tech	NCSU, Duke, UNC-CH, NCCU, Meredith, Campbell, Shaw University, St. Augustine's, Wake Tech, Durham Tech	NCSU, UNC-CH, Duke, Peace, NCCU, Meredith, Wake Tech, NC A&T	NCSU, Duke, UNC-CH, NC A&T, Meredith, NCCU	NCSU, Duke, NC A&T, Campbell, Shaw, St. Augustine's, Wake Tech, Durham Tech
# Degree completions 2014- 2016	3,746	17,473	16,886	15,307	7,902
Top local employers	Oracle, Cisco, IBM, Lenovo, SAS, Red Hat, Quintiles, Duke, Blue Cross Blue Shield, BASF, MetLife, BB&T	IBM, Oracle, Cisco, Quintiles, Red Hat, TEKsystems, SAS, Quintiles, LexisNexis, Siemens, NetApp, EMC, Lenovo, Duke, MetLife, Blue Cross Blue Shield, Fidelity, BB&T, Allscripts	Oracle, SAS, IBM, Cisco, Quintiles, TEKsystems, Inc Research, CGI Group, MetLife, Blue Cross Blue Shield, Accenture	Cisco, Oracle, IBM, NetApp, Lenovo, Red Hat, LexisNexis, Allscripts, Duke, Blue Cross Blue Shield	Oracle, Cisco, SAS, Quintiles, IBM, MetLife, CGI Group, Verizon, Blue Cross Blue Shield, BB&T, Deloitte
Worker population	15,524	52,700	13,435	13,471	35,872
Median salary	\$98,155	\$84,344	\$80,808	\$114,712	\$97,490

UX Design	Marketing Managers	Management & Executives	Legal	Finance & Accounting	Administrative
					
<p>NCSU, UNC-CH, Meredith, Peace, NCCU</p>	<p>Duke, UNC-CH, NCSU, Meredith, NCCU, Peace, Campbell, Shaw, St. Augustine's</p>	<p>Duke, UNC-CH, NCSU, NCCU, Meredith, NC A&T</p>	<p>Duke, UNC-CH, Campbell, NCCU, Peace, Meredith</p>	<p>NCSU, Duke, UNC-CH, Meredith, NC A&T, NC Central, CCCC</p>	<p>Wake Tech, Durham Tech, Piedmont CC</p>
<p>4,971</p>	<p>10,630</p>	<p>11,284</p>	<p>2,947</p>	<p>2,245</p>	<p>491</p>
<p>IBM, Oracle, SAS, Lenovo, TEKsystems, EMC Corporation, Teradata, Epic Games, Cisco, Deutsche Bank</p>	<p>Oracle, Cisco, IBM, Lenovo, SAS, Red Hat, LexisNexis, BASF, Siemens, Bayer, Blue Cross Blue Shield, GlaxoSmithKline, Cree, Allscripts, SciQuest, ChannelAdvisor</p>	<p>Oracle, Cisco, IBM, Lenovo, SAS, Red Hat, Quintiles, Duke, Blue Cross Blue Shield, BASF, MetLife, BB&T</p>	<p>Oracle, IBM, Wells Fargo, Red Hat, SAS, Cisco, LexisNexis, Parker and Lynch</p>	<p>Cisco, IBM, Inc Research, Duke, Vaco Financial, PWC, Credit Suisse, MetLife, Deloitte, Ernst & Young, Grant Thornton, Blue Cross Blue Shield</p>	<p>Xerox, Wells Fargo, PNC Bank, Duke, WakeMed</p>
<p>4,416</p>	<p>7,085</p>	<p>47,766</p>	<p>5,976</p>	<p>25,388</p>	<p>141,035</p>
<p>\$69,888</p>	<p>\$77,605</p>	<p>\$112,528</p>	<p>\$72,467</p>	<p>\$56,826</p>	<p>\$34,819</p>



Passion for Invention

Formerly known for its textiles, furniture and tobacco, the Research Triangle has reinvented itself as a booming hub for tech and life sciences. The American Tobacco Historic District in Durham, NC (pictured) was established on the campus of a 19th century tobacco factory. Today, it's home to the Durham Bulls baseball team, Durham Performing Arts Center (DPAC), Google for Entrepreneurs Tech Hub American Underground, and more than 3,500 workers in tech, advertising and education.

Welcome to the Innovation Capital of the South

When 29-year-old Matthew Sniff made the decision to move his startup from Silicon Valley last year, he made a list of requirements:

“I needed to ultimately pick a place that could work well for living, as well as working,” Sniff wrote in a blog post published earlier this year. “It had to be a large, metro region so that we could effectively hire the best people. It had to be an area with a low cost of living, so that we could extend our runway for our bootstrapped company. It also had to be a place I would enjoy living—a place that would feel like home.”

Ultimately, after considering Portland, Denver, Austin, Nashville, Richmond and others, Sniff found exactly what he was looking for in the Triangle.

“

There is an overwhelming amount of young, professional workers in the region, and with an incredibly low cost of living, businesses are able to make fair offers to employees at +50% less than what they would need to pay the same employee in the Bay Area.

- Map My Customers' Founder & CEO, Matthew Sniff on why he moved his startup from the Bay Area to the Triangle.

Named by Business Insider as one of the fastest-growing startup scenes in the US, the Triangle is home to hundreds of startup companies in a wide range of industry sectors including Software, Life Sciences, Consumer Products, Design-Media, and the Internet of Things.

The success of these companies depends not only on the pipeline for entrepreneurs here in the region, but the support they receive from the community. The Triangle is home to the largest entrepreneurial support organization in the country—the Council for Entrepreneurial Development.

Startup incubators, like the American Underground and HQ Raleigh, infuse entrepreneurial thinking and doing in every sector.

An intentional push to nurture diversity in our ranks produces significantly more female- and minority-led ventures here year after year.

Each of our universities operates entrepreneurship programs that support the startup community: sharing equipment and resources for R&D, providing co-working space, and partnering with entrepreneurs and businesses of all sizes to help develop and promote new technology.

In 2014, two of the Triangle's top universities, Duke and UNC Chapel-Hill, ranked among the top 50 universities in the world for the most U.S. utility patents issued.

Additionally, Crowdfunding

legislation passed last year enables new firms to harness small amounts of capital from community-oriented investors, putting up as little as \$5,000 each. This is already driving a new wave of technology-oriented startup activity in our region.

#1 State for Women in Tech

North Carolina is #1 for employment of women in the technology sector.



Testimonial

Juan Porras

Juan Porras is co-founder and CEO of Factivate, a cloud based data analytics platform. He is currently the CODE2040 entrepreneur-in-residence at American Underground, an entrepreneurial incubation hub in Durham, NC.

It's easy to see why technology entrepreneurs are flocking to the Research Triangle Region. Raleigh, Durham, and Chapel Hill are consistently ranked as top cities in the USA with the highest concentrations of Ph.Ds.

The close proximity of world-class research institutions (Duke University, UNC Chapel Hill, NCCU, NCSU, A&T, etc) gives organizations access to advanced resources and talent.

These clusters have constructed an innovation culture where continuous learning and experimentation are highly valued within all levels of our business ecosystem. Consequently, entrepreneurship, experimentation, sustained innovation, and collaboration are now synonymous with the region itself.

As a technology entrepreneur, I chose to start and grow my company in Durham. In stark contrast to places where “innovation bubbles”

and “herd mentality” prevail, I have experienced how Durham’s unique blend of its innovation culture, coupled with a diverse population and creative arts community, has positioned my company to build truly disruptive solutions.

In short, Durham helped us think differently about innovation. From my travels around the world, there are not many cities that can easily claim to organically do this for entrepreneurs.

Once I experienced this unique advantage, I quickly understood why organizations like the American Underground and Google for Entrepreneurs are investing heavily in the region’s future.

This is the reason why I chose to work as the Code2040 entrepreneur-in-residence for the American Underground. These organizations are leading the way in demonstrating how truly diverse startups experience competitive

advantages by living and working in the Triangle.

The Triangle’s startup company growth, funding numbers, employment numbers, and even American Underground’s 50% minority-owned businesses are all proof that our technology ecosystem thrives at a state, national, and global level.

Take the pay it forward culture from Silicon Valley, the high R&D and Ph.D. concentration from Boston, the focus on building profitable companies you get in New York, and the dedicated tech community and support infrastructure you find in Boulder CO, and you will begin to have an idea for what the Research Triangle region technology ecosystem is like.

The most exciting part of our region’s story, however, is that while it is expanding rapidly, we’re just starting to see glimpses of its potential as a world-class startup hub.

Incubators & Accelerators

American Underground: One of seven U.S. Google Tech Hubs and with four locations across the Triangle, the American Underground offers office and workspace, accelerator and incubator programs, and a tech training academy.

Notable Alumni: ArchiveSocial, iContact, iScribes, Mati Energy Drink, Windsor Circle, Bronto Software (acquired by Oracle), Automated Insights

Technology Incubator at Centennial Campus: Housed at North Carolina State University's Centennial Campus, the Technology Incubator provides access to researchers and students, giving startups a distinct advantage for R&D.

Notable Alumni: BioResource International, ArrayXpress

Launch Chapel Hill: Recognized as one of the top five best performing university business accelerators in

North America, Launch Chapel Hill is the result of a partnership between UNC's Kenan-Flagler Business School and the Chancellor's Innovate Carolina Initiative, the Town of Chapel Hill, Orange County and the Eric Becker family.

Notable Alumni: Impulsonic, Keona Health

First Flight Venture Center: Located in the heart of Research Triangle Park and with more than 25 years of experience,

FFVC is touted as one of the most successful incubator programs in the country. This success lies in First Flight's ability to enable companies to reduce their initial capitalization requirements and their operation costs by providing affordable space with flexible leases, R&D laboratories, shared business services, and management guidance.

Notable Alumni: United Therapeutics, SciQuest, Bloodhound Software, WhiteSpace Health, Koolbridge Solar

2,393
Startups established
in the Triangle Region

\$231
Per capita in
venture funding

#2
Fastest growth in U.S.
patents received

\$1.1B
in IPOs the
last five years

\$300M
in VC investment 2013-2016

18k
Patents awarded since 2000

\$9.2B
in acquisitions since 2012

4th
in IPOs

Diving Deep: The Transformative Impact of the Research Triangle Park

In the 1950s, North Carolina was in crisis. Ranked 49th in the nation in per capita income, our state's economy was dependent on tobacco, textiles, and furniture. University graduates were leaving the state in droves in search of better jobs. The future looked grim indeed.

But then-Governor Luther Hodges fashioned a bold solution: Working with leaders of government and industry, they imagined the creation of a research park to engineer a new economy.

Securing the cooperation of Duke University, NC State University, and the University of North Carolina at Chapel Hill, Hodges tapped Archie Davis, the first president of the Research Triangle Foundation, to raise the capital to make it happen.

Davis famously traveled the state raising money from rich and poor alike to acquire the land for the Park. Through his donors' generosity, Archie Davis created a special legacy:

that the Park be run forever as a private not-for-profit.

When it was founded, Research Triangle Park (RTP) was America's second university research park, and the first shared endeavor in which universities partnered to commercialize technology. Today, it has 264 companies and almost 50,000 talented workers. It remains North America's largest and, arguably, the world's most successful research park.

In its first 25 years, RTP's growth and development was characterized by large firms such as IBM and Burroughs-Wellcome—the U.S. EPA's largest research laboratory—locating R&D facilities within the Park. In the 25 years that followed, the Park's impact extended beyond its geographic boundaries through entrepreneurial spawning. By the 1990s, the entire Raleigh, Durham, and Chapel Hill region had begun to be referred to as “The Research Triangle.”

Collaboration between RTP companies and the surrounding community is standard operating procedure. Members of the UNC faculty have taught IBM management teams; IBM also funded the robotics lab at NC State.

Since 1976, RTP entities have received over 3,700 patents.

The proximity of the Park also enables local university partners to attract research dollars. Today, the three universities bring in \$3 billion in research funding annually. Those dollars support 10,000 jobs at UNC alone, and 20,000 jobs overall.

RTP has also quietly grown its entrepreneurial community. Currently, more than 60 percent of





the companies located in Research Triangle Park have 25 employees or less. The rise of small firms over the past three decades has added energy, vitality and creativity that often leads to partnerships with larger firms in the Park and holds great promise for the Park's future.

Almost 60 years into its history, RTP isn't resting on its laurels. In 2014, the Research Triangle Foundation announced plans to transform RTP from an area dedicated to corporate research campuses to a mix of amenity-rich innovation nodes-- areas where workers can live, work, and play.

When all is said and done, the greatest single contribution RTP has made to national economic, social, and environmental well-being is the model itself: it has proven repeatedly that collaboration and cooperation can succeed, and emphatic proof that enlightened public investments can lead to spectacular returns.

RTP Innovations

UPC Barcode and Scanner & CTRL-ALT-DELETE: These inventions were developed by IBM in RTP.

Taxol Anti-Cancer Drug: Developed by two scientists at RTI International, this drug has saved the lives of thousands of cancer patients.

AZT (Azidothymidine): The first drug to substantially improve quality of life for HIV/AIDS patients was developed in the Park.

On-board Plane Wind Shear Warning: This aviation safety feature was developed by RTI International scientists.

Industrial LED Lighting: Created in the Park by Cree, this product has reduced energy consumption worldwide.

Feeding the World: Syngenta, Bayer Crop Science, AgBiome, and others are creating products in the Park that produce higher yield crops.

Build Powerful Partnerships

NC State's Centennial Campus, (pictured) a 1,000-acre research park, has over 70 corporate, government and non-profit research partners, including the only NSF-funded smart grid research center in the U.S. NC State was also named a National Center of Academic Excellence in Information Assurance/Cyber Defense Research by the National Security Administration.



How University Partnerships Drive Triangle Businesses Further

In an industrial design studio at NC State University, students are brainstorming ideas for adapting kitchen appliances to reclaim the heat that is usually lost during food preparation. It's a complex project involving advanced materials, cutting-edge prototypes, and sophisticated cost-flow modeling.

This isn't your typical design class; these students are as likely to be majoring in engineering or business management as industrial design. And they're hoping for more than just a good grade. They want their names on a patent that could ultimately lead to new products for use in restaurant kitchens.

It's this kind of "think and do" attitude that led Fortune 500 firm Eastman Chemical Company to ink a six-year, \$10 million research agreement with NC State in 2012. Since then, the company has

sponsored more than 30 research projects spanning eight departments across campus, including industrial design, chemistry, forest biomaterials, materials science and engineering, chemical and biomolecular engineering, and textile engineering, and science.

After just four rounds of funding, the partnership has already resulted in six patent applications for new and improved products. That's good news for Eastman, a global company with 14,000 employees and 45 manufacturing sites worldwide that relies on innovation to maintain its leadership in chemicals, fibers and plastics.

But this isn't just happening at NC State. Compared to other major metros, the Triangle region ranks #1 for R&D conducted at universities per \$1,000 of GDP. Across the region, universities, businesses and

government entities are known for relying on the skills of the Triangle's high-performing students and world-leading researchers to support new inventions and solve complex problems.

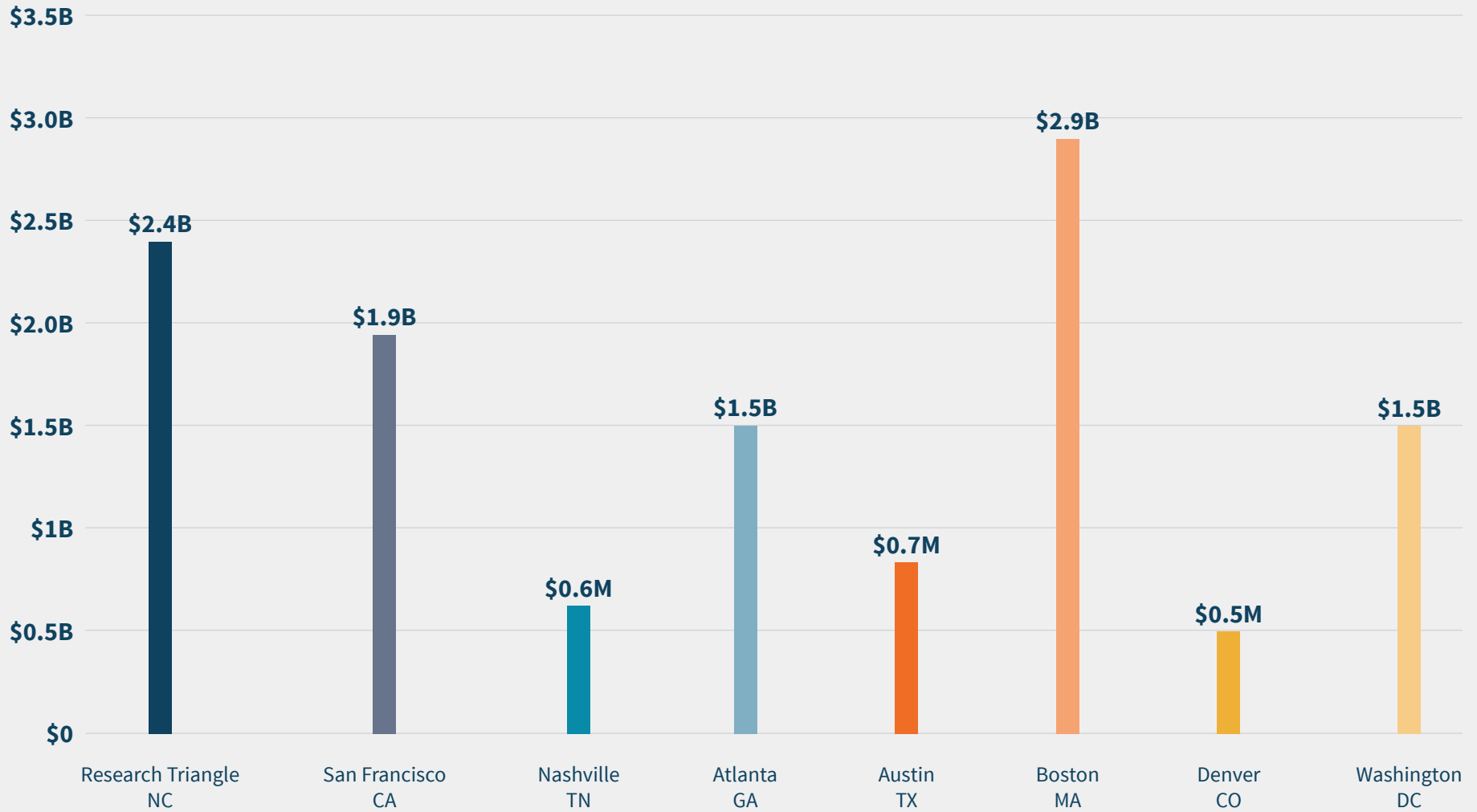
The National Institutes of Health is UNC-Chapel Hill's largest federal funder, awarding more than \$400M in 2016 for nearly 1,000 projects. Duke's Information Initiative, an interdisciplinary program focused on "big data" computational research, has established partnerships with Fidelity, Accenture, as well as major energy industry and policy leaders through a partnership with the university's Energy Data Analytics Lab.

And in just the past several months, NC State has been selected to lead some of the federal government's most important collaborative research projects, including a \$140

million advanced manufacturing institute, a \$60 million big data laboratory, and a \$25 million effort to combat the spread of nuclear weapons. NC State has also been chosen to lead one of the U.S. Department of Agriculture's seven regional climate research hubs.

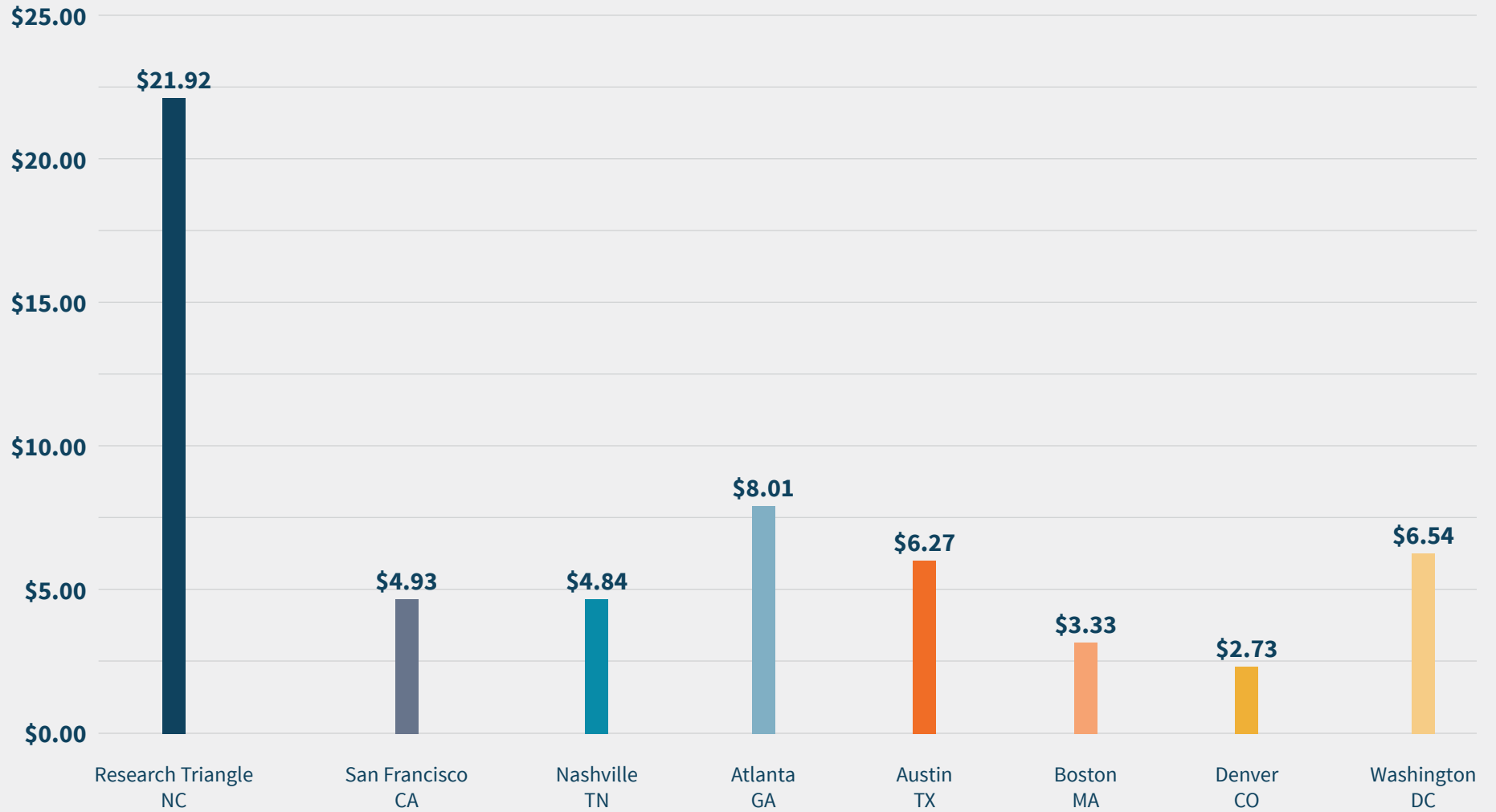
The Triangle region ranks #1 for R&D conducted at universities per \$1,000 of GDP

Total R&D Expenditures at Universities (Billions)



All R&D Conducted at Universities per \$1,000 of GDP (2013)

Source: EMSI





Do Better Business

The Research Triangle enjoys an enviable business climate, fueled by low taxes, low business costs, and an aversion to red tape. It's one of the reasons companies like Red Hat, IBM, Fidelity Investments, Credit Suisse, MetLife, Quintiles, Cisco Systems, and GlaxoSmithKline call the region home – and why so many others are moving here.

Low Cost, Low Risk, & Open for Business

More bang for your buck, minimal regulatory road blocks and an area that will grow around you rather than make room for you—those are the benefits of establishing your second headquarters in the Research Triangle region.

Low Taxes

The Research Triangle Region and North Carolina are consistently ranked among the best business climates in the nation by Site Selection, Forbes, CNNMoney, and Chief Executive.

North Carolina was ranked 11th overall by the Tax Foundation's 2017 State Business Tax Climate Index. Our state imposes the lowest corporate income tax in the country at 3%, and has already passed a

measure to lower it to 2.5% in 2018. Earlier this year, our state also reduced the individual income tax rate from 5.75 to 5.499%.

New and existing businesses alike benefit from financial assistance programs that lower the cost of doing business to operate competitively. State and local governments offer discretionary cash grants to help offset the cost of locating or expanding a facility in the state.

The Triangle is competitive with any major metro when it comes to costs.

Construction costs, electric rates, overall taxes, and our cost of living are all below the national average. In fact, the city of Raleigh's business costs fall 18% below the national average. Additionally, according to KPMG's 2016 Guide to International Business Locations Costs, the Triangle has a significantly lower cost of doing business compared to other major U.S. metros.

Real estate is still a bargain here.

According to JLL's U.S. Technology Office Outlook report, the Triangle provides a high market opportunity

and lower costs for tech companies. Downtown Durham's American Tobacco Campus and Downtown Raleigh's emerging Warehouse District attract technology firms to the submarket particularly for its development of warehouse buildings into creative work spaces with cheaper rents.

Stability

Our local and state government officials are committed to strategic, lasting investments in education, workforce development, infrastructure, and technology. They provide sound, stable fiscal policy through a constitutionally-mandated balanced budget, reasonable tax rates, and rare AAA bond ratings at the state and municipal levels.

Even as most states face revenue shortfalls and budget crunches, our state has generated a \$552 million revenue surplus, making us one of four states with a surplus.

Additionally, in July 2017, Raleigh and Durham were ranked Top Best Run Cities in America by WalletHub, citing good use of public funding.

3% The Lowest Corporate Income Tax Rate in the Country

For the last four years, North Carolina has adopted measures to lower the corporate income tax from 6.9% in 2013 to 3% today, to 2.5% in 2019.

6.75 – 7.5% Sales & Use Tax

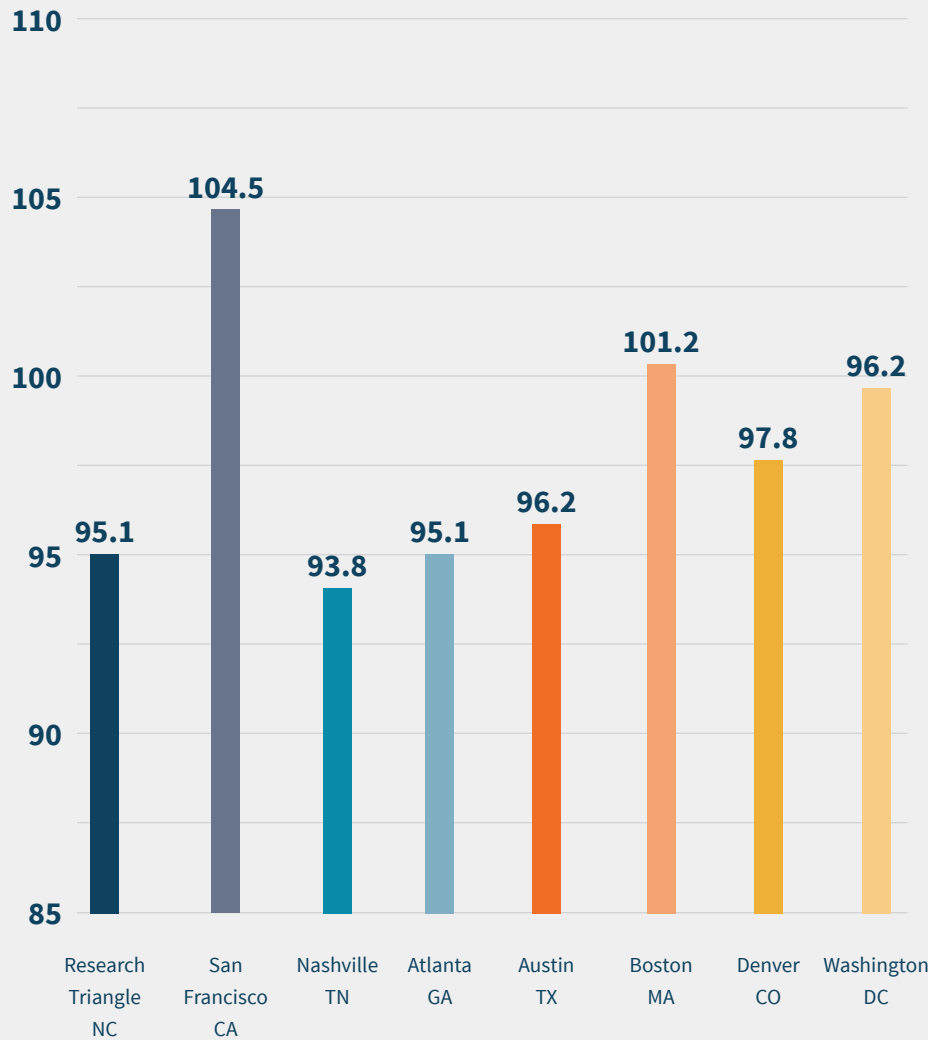
4.75% state tax and 2-2.75% local tax

5.499% Personal Income Tax

In 2017, the state reduced the personal income tax from 5.75% to 5.499%. Lowering to 5.25% in 2019.

Cost of Doing Business Index 2016

Source: KPMG



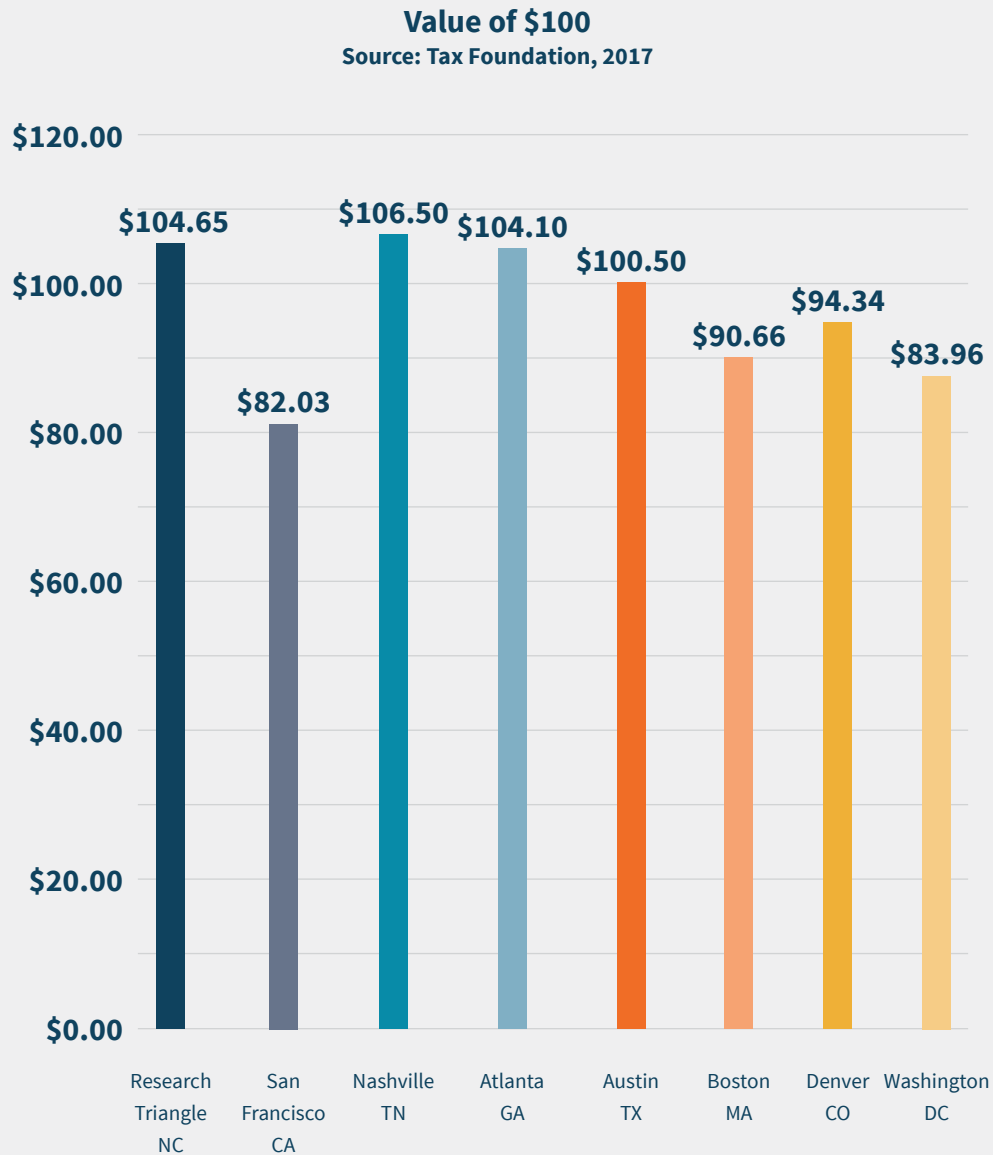
Average Price Per Square Feet/ Vacancy Rate in the Triangle

Class of Space	2017 Vacancy Rate %	2017 Avg. Price/SF
A	7.50%	\$25.48
B	4.60%	\$19.02
C	1.80%	\$16.70

2017 State Business Tax Climate Index

	Overall Rank	Corporate Tax Rank	Individual Income Tax Rank	Sales Tax Rank	Property Tax Rank
NC	11	4	15	19	31
GA	36	10	42	33	21
CA	48	33	50	40	15
MA	27	37	13	18	45
TN	13	22	8	46	29
DC	47	31	43	33	47
CO	16	18	16	39	14
TX	14	49	6	37	37

Source: Tax Foundation



#1
Lowest State & Local Business Tax Burden in the U.S.
(2016) – Ernst & Young

#1
Top Competitive State (Prosperity Cup)
(2016) – Site Selection Magazine

#2
Best Business Climate Ranking
(2016) – Site Selection Magazine

#3
Best State for Business
(2016) – Chief Executive

#5
Lowest Business Costs
(2016) – Forbes

#1
Best State for Workforce Development in the Atlantic Region
(2016) – Site Selection Magazine

#2
Best State for Business
(2016) – Forbes

#2
Lowest Unionization Rate in the U.S.
(2016) – Ernst & Young

#4
Best Labor Climate
(2016) – Area Development

AAA
Bond Rating for 50 consecutive years
(2016) – Standard & Poor's



Available Sites

An Overview of HQ2 Sites in The Triangle

For Amazon's HQ2, we've identified seven unique sites across the region that fit the requirements stated in your RFP. The following pages contain a brief overview of each of those sites, with further information provided in the accompanying documents. Full resolution maps and photos can be viewed using the provided flash drive.



Park Center, Park Point & Triangle Metro Center

Research Triangle Park, NC - Durham County

Description: Three combined properties within the Research Triangle Park: Park Point, Triangle Metro Center (TMC), and Park Center.

Real Estate Type: A mix of existing office space available for upfits and greenfield for build-to-suit.

Acreage: 220 acres (combined)

Zoning: A combination of SRP (Science Research Park) for Park Point and TMC and SRP-C (Science Research Park – Center) for Park Center. SRP was established to provide for business and scientific research, development and production of prototype projects in an open, campus-like setting. It allows for low density development of production facilities, offices and support services. SRP-C was recently developed to allow for moderate to high intensity mixed-use development. The mix of uses is to be supported by access to open space and encourage the use of transit as well as bike and pedestrian amenities.

Services available: Water, wastewater, electricity, broadband fiber, and natural gas.

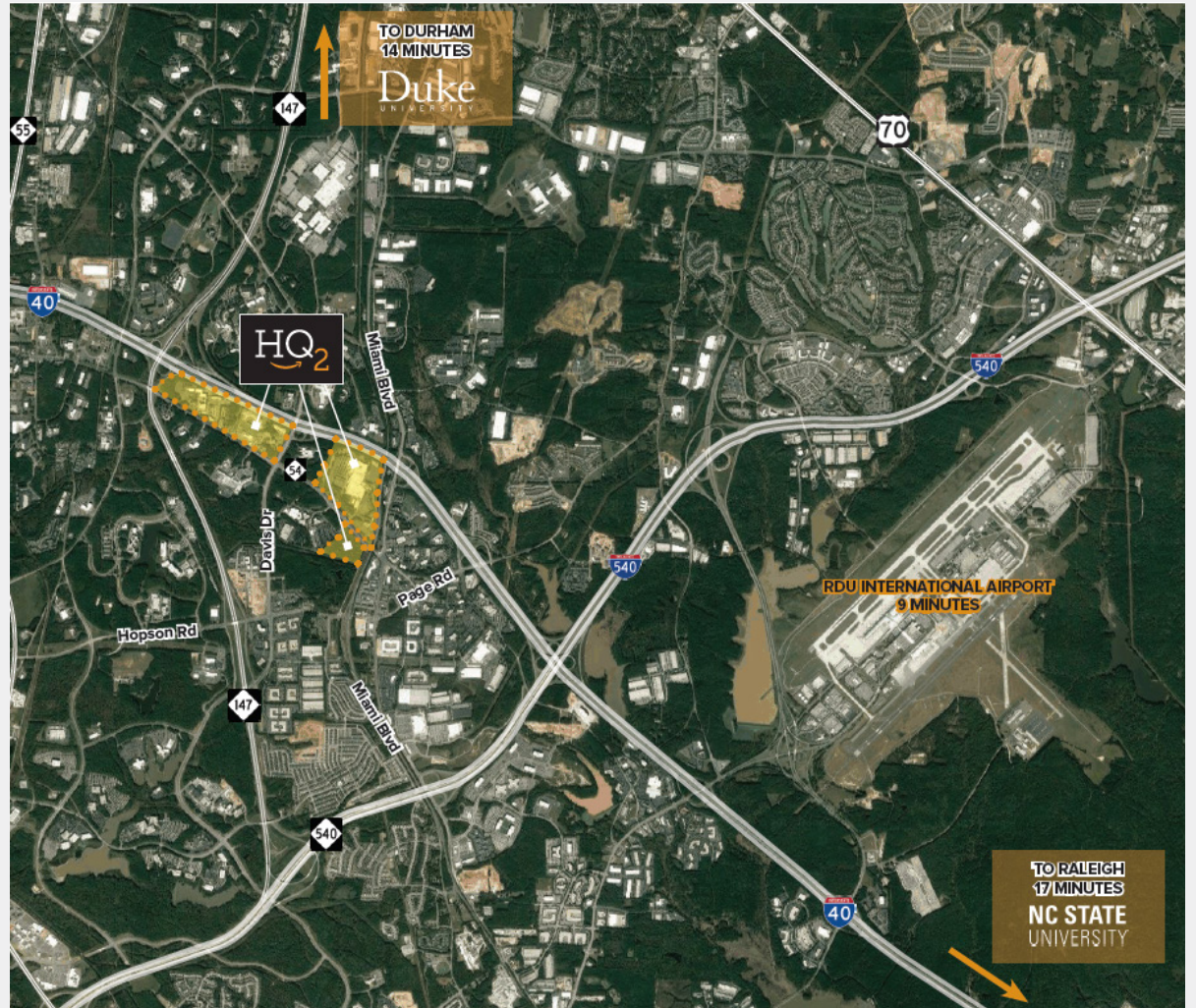
Fiber: There are five providers for this area: AT&T, Frontier, Spectrum, Level3, and CenturyLink. Spectrum, Frontier, and Level3 provide fiber over the current 1gig speeds (and can provide 10gig and 40gig networks).

Transit: GoTriangle provides current bus and shuttle services. Future services for commuter rail are planned, with last mile connections to include shuttles; On Demand services and RDU-RTP connectors to run on fixed routes.

Distance to nearest metro area: Site is 16 miles (20-minute drive time) from downtown Raleigh (Raleigh MSA - pop. 1,273,568); site is located within the Raleigh-Durham-Chapel Hill CSA, pop. 2,117,103.

Distance to international airport: 6 miles (10-minute drive time) to Raleigh Durham International Airport (RDU).

Distance to nearest interstate: Site is adjacent to I-40.



Parks & Partners, Catalytic Growth, Downtown Raleigh & Midtown

Raleigh, NC - Wake County

Description: Raleigh offers a diverse combination of sites on university campus, neighborhood gem, and booming and catalytic growth business districts – all integrating and connecting to Raleigh’s “Central Park.”

Real estate type: A mix of sites planned for build-to-suit and redevelopment.

Acreage: Approximately 308 acres combined

Zoning: Allows for mixed-use development up to various heights.

Services available: Electric power served by Duke Energy. Water and wastewater served by City of Raleigh. Natural gas served by PSNC Energy. AT&T, CenturyLink, Spectrum, and Verizon are the primary providers of advanced telecommunications service to residents and businesses.

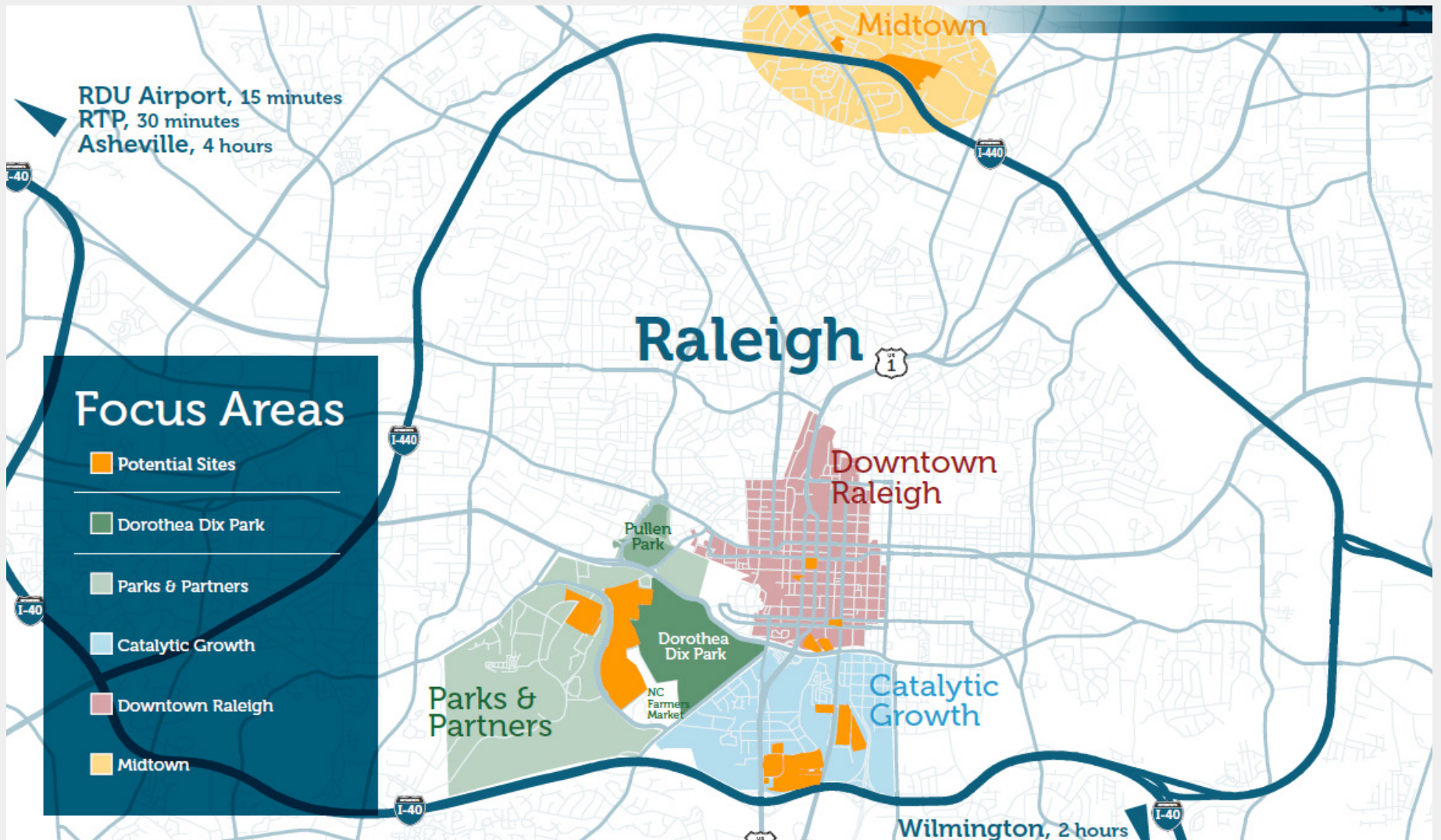
Fiber: In 2015, Google announced its plans to create fiber networks throughout the Triangle. Raleigh is now only one of two communities to land work with both Google Fiber and AT&T GigaPower.

Transit: The Raleigh sites will all be directly served by a robust frequent transit network that runs throughout Raleigh’s core and connects to Cary. The downtown Raleigh and Centennial Campus sites will be located along or near a bus rapid transit corridor between Raleigh and Cary, as well as a 37-mile regional commuter rail line connecting Wake and Durham counties, which will be anchored by the nearby multimodal Raleigh Union Station. This enhanced transit service and infrastructure will be completed within the next 10 years as part of a \$1 billion investment by Wake County in new local funds for enhanced transit, which also includes a tripling of local and regional bus service.

Distance to nearest metro area: Within the Raleigh-Durham-Chapel Hill CSA, population has grown over 2 million people. The sites are within Raleigh (MSA pop. 1,273,568).

Distance to international airport: 20 minutes to Raleigh-Durham International Airport (RDU).

Distance to nearest interstate: The sites are all within a mile or less of Interstate 40 or Interstate 440.



Chatham Park

Pittsboro, NC - Chatham County

Description: A 7,095-acre planned community bordered by Pittsboro's historic downtown, the scenic Haw River and pristine Jordan Lake.

Real estate type: Upfitting existing space and greenfield for build-to-suit.

Acreage: 7,100 total acres

Zoning: Planned Development District - established and intended to promote innovative land planning, design and layout of large development projects that may not otherwise be permitted under general zoning district standards, subdivision regulations, or other development regulations.

Services available: Water, wastewater, electricity, broadband fiber, and natural gas.

Fiber: Century Link has committed to serving each business with 10 GB of broadband service and every residence with 1 GB of broadband service. For this project, Century Link would provide the needed fiber infrastructure.

Transit: Bus transportation available from Pittsboro to Chapel Hill, NC.

Distance to nearest metro area: Raleigh MSA (pop. 1,273,568); Site is located 30 miles from downtown Raleigh.

Distance to international airport: 30 minute drive time to Raleigh Durham International Airport (RDU).

Distance to nearest interstate: Adjacent to highways 64 and 15-501. 30 miles from Interstate 40. 15 miles from Interstate 540.



Parmer RTP & Downtown Durham

Research Triangle Park & Durham, NC - Durham County

Description: The Amazon HQ2 development concept involves submitting a site in the Research Triangle Park (RTP) called Parmer RTP, and buildings in downtown Durham's Innovation Hub. The Parmer RTP site and the downtown are located only six miles apart by NC Highway 147.

Real estate type: A mix of existing office space available for up-fits/redevelopment & greenfield for build-to-suit.

Acreage: 561.5 net acres + various-sized sites in Downtown Durham.

Zoning: SRP (Science Research Park): established to provide for business and scientific research, development and production of prototype projects in an open, campus-like setting. It allows for low density development of production facilities, offices and support services.

Downtown Durham Sites are DD-2 Zoning. Development District 2 is a form-based zoning district allowing dense development and designed for innovation district-type projects.

Services available: Electric power served by Duke Energy. Water and wastewater served by the City of Durham and Durham County. Natural gas served by PSNC Energy. Fiber available through five providers.

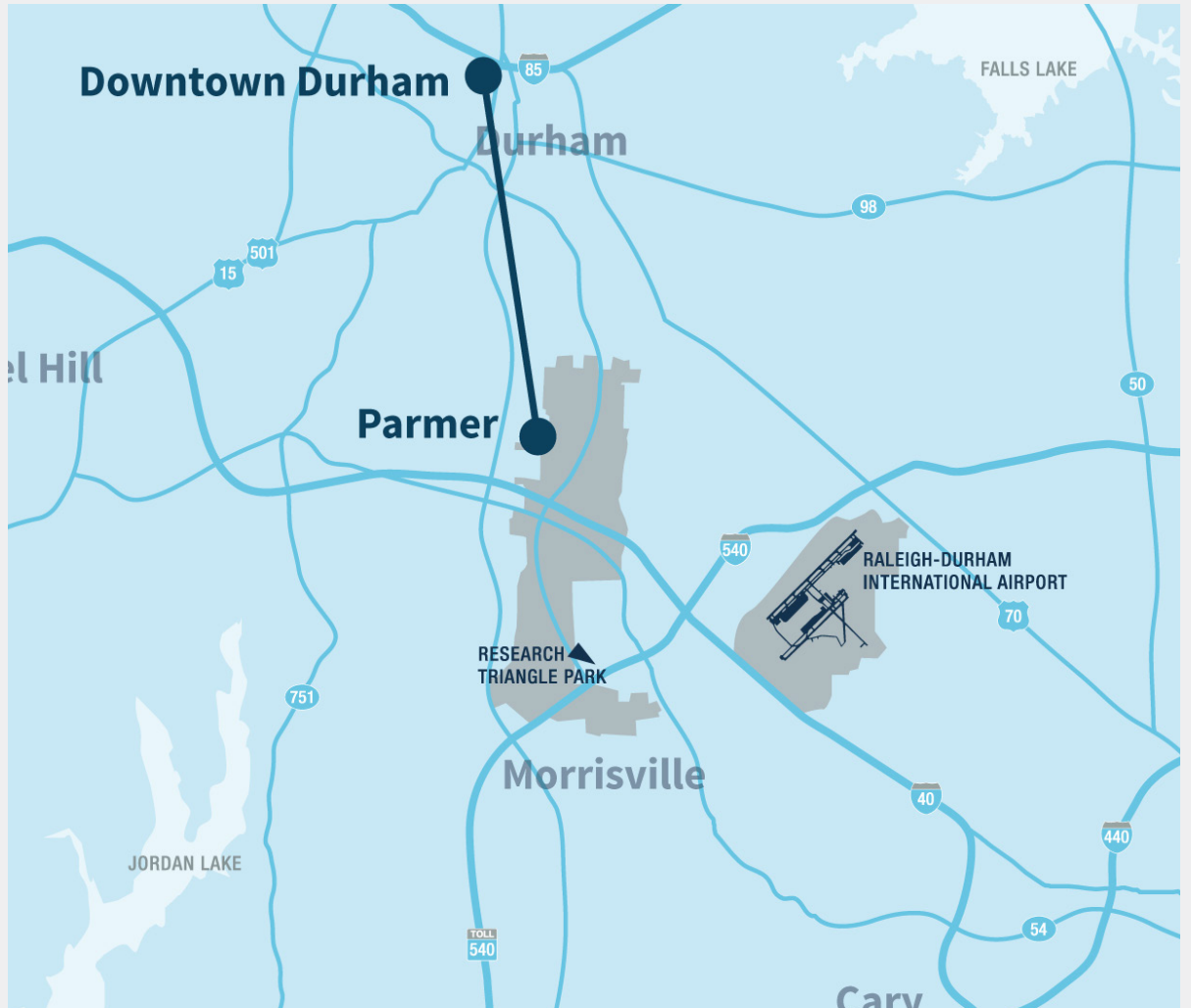
Fiber: There are five providers for this area: AT&T, Frontier, Spectrum, Level3, and CenturyLink. Spectrum, Frontier, and Level3 provide fiber over the current 1gig speeds and can provide 10gig and 40gig networks.

Transit: GoDurham (Regional Bus Service). The Parmer RTP site is along the planned commuter rail service corridor, a future 37-mile transit system serving Durham and Wake County.

Distance to nearest metro area: RTP site is located 30 miles from downtown Raleigh (pop. 1,273,568); 6.6 miles to downtown Durham.

Distance to international airport: RTP site is 9 minutes to Raleigh-Durham International Airport (RDU) via Interstate-40. Downtown Durham Site is 12 miles and 14 minutes driving time from RDU.

Distance to nearest interstate: The RTP site is 2 miles from I-40 and future I-885. Adjacent to NC-147. The Downtown Durham site abuts NC-147 and interstate-quality highways that connect I-85 to I-40.



East Cary

Cary, NC - Wake County

Description: East Cary is a truly infill location in the heart of the Research Triangle. Minutes from NC State University, Downtown Cary, Downtown Raleigh and the RDU International Airport, the site provides direct access to a mass transit corridor as well as Interstate 40. It is an Urban Oasis located in one of the most desirable and tech talent-rich markets in the country.

Real estate type: Greenfield planned for build-to-suit and mixed use.

Acreage: Approximately 175 acres

Zoning: Office/Institutional – Allows for the development of office and supporting office uses.

Services available: Electric power served by Duke Energy. Water and wastewater served by Town of Cary. Natural gas served by PSNC Energy. Fiber available through Google Fiber and AT&T.

Fiber: Up to 1Gbps available through both Google Fiber and AT&T.

Transit: The East Cary site will be located in close proximity to a future bus rapid transit corridor between Cary and Raleigh, part of a robust frequent transit network that includes four bus rapid transit corridors. The site will also be located near a future 37-mile regional commuter rail line connecting Wake and Durham counties. This enhanced transit service and infrastructure will be completed within the next 10 years as part of a \$1 billion investment by Wake County in new local funds for enhanced transit, which also includes a tripling of local and regional bus service.

Distance to nearest metro area: Site is located within the Raleigh MSA (pop. 1,273,568).

Distance to international airport: 9.5 miles, 10-15 minutes driving time to Raleigh-Durham International Airport (RDU).

Distance to nearest interstate: The site is adjacent to I-40, and 2 miles to I-440, ten miles to I-87, twelve miles to I-540.



Wendell Falls

Wendell, NC - Wake County

Description: Wendell Falls is 15 miles and (yes, really) only 15 minutes from downtown Raleigh, the heartbeat of the Raleigh-Durham-Chapel Hill Triangle. One of the top ten fastest growing metro areas in the U.S. and an increasingly popular destination for the creative class.

Real estate type: Greenfield planned for build-to-suit.

Acreage: Approximately 350 acres

Zoning: Planned Unit Development through the Town of Wendell for up to 10 stories and 2,000,000 SF of commercial, and Manufacturing & Industrial in the Town of Knightdale.

Services available: Electric power served by Duke Energy. Water and wastewater served by City of Raleigh. Natural gas served by PSNC Energy. Fiber available through AT&T.

Fiber: Up to 1Gbps available through AT&T.

Transit: Wake County is investing more than \$1 billion in new local funds over the next 10 years for new transit, including a tripling of bus service countywide. Wendell will have enhanced bus service linkages to Raleigh, which will provide connections to a robust frequent transit network including four bus rapid corridors, and a 37-mile regional commuter rail line between Wake and Durham counties.

Distance to nearest metro area: Within the Raleigh-Durham-Chapel Hill CSA, population has grown over 2 million people. 15 miles to downtown Raleigh (MSA pop. 1,273,568).

Distance to international airport: 27 minutes to Raleigh-Durham International Airport (RDU).

Distance to nearest interstate: Wendell is located on Interstate-87, which provides a direct 70 MPH freeway connection to the City of Raleigh. The site is located directly at interchange 427 of Interstate 87, and ten miles from I-40.



Building	Stories	Total SF	Phase
1. Conf. Center/Office	5	250,000	1
2. Office	5	170,000	1
3. Office	10	360,000	1
4. Office	5	165,000	1
Phase 1 Sub Total		945,000	1
5. Office	5	100,000	2
6. Office	5	180,000	2
7. Office	10	450,000	2
8. Office	5	180,000	2
9. Office	10	390,000	2
10. Office	5	180,000	2
11. Office	10	390,000	2
12. Office	5	180,000	2
Phase 2 Sub Total		2,050,000	2
13. Office	10	390,000	3
14. Office	10	390,000	3
15. Welcome Center/Off.	10	760,000	3
16. Office	5	130,000	3
17. Office	10	360,000	3
18. Office	5	180,000	3
19. Office	10	350,000	3
20. Office	8	264,000	3
21. Office	8	288,000	3
22. Office	8	264,000	3
Phase 3 Sub Total		3,138,000	3

Veridea

Apex, NC - Wake County

Description: Veridea is a fully approved, 1,500 acre live-work-play-learn community in Apex - the heart of the fastest growing section of North Carolina's Research Triangle Region - which will offer a unique, engaging and affordable place for Amazon HQ2 and its workforce.

Real estate type: Greenfield planned for build-to-suit and mixed use.

Acreage: 1,500 acres

Zoning: Fully Vested Entitlement to include 12,000,000 SF of commercial office space; 3,500,000 SF of retail space; 8,000 residential units; and unlimited hotels, healthcare and community uses.

Services available: Water and sewer are provided directly by the Town of Apex. Both Duke Energy and the Town of Apex can deliver power to the Property, each having an abundance of redundancy built into the overall state grid system with multiple energy generating facilities. The Town can create a special rate for non-residential customer that will agree to co-generate shifting load during peak hour demand onto their own generators. Another advantage is Amazon would be assured constant power during major outages.

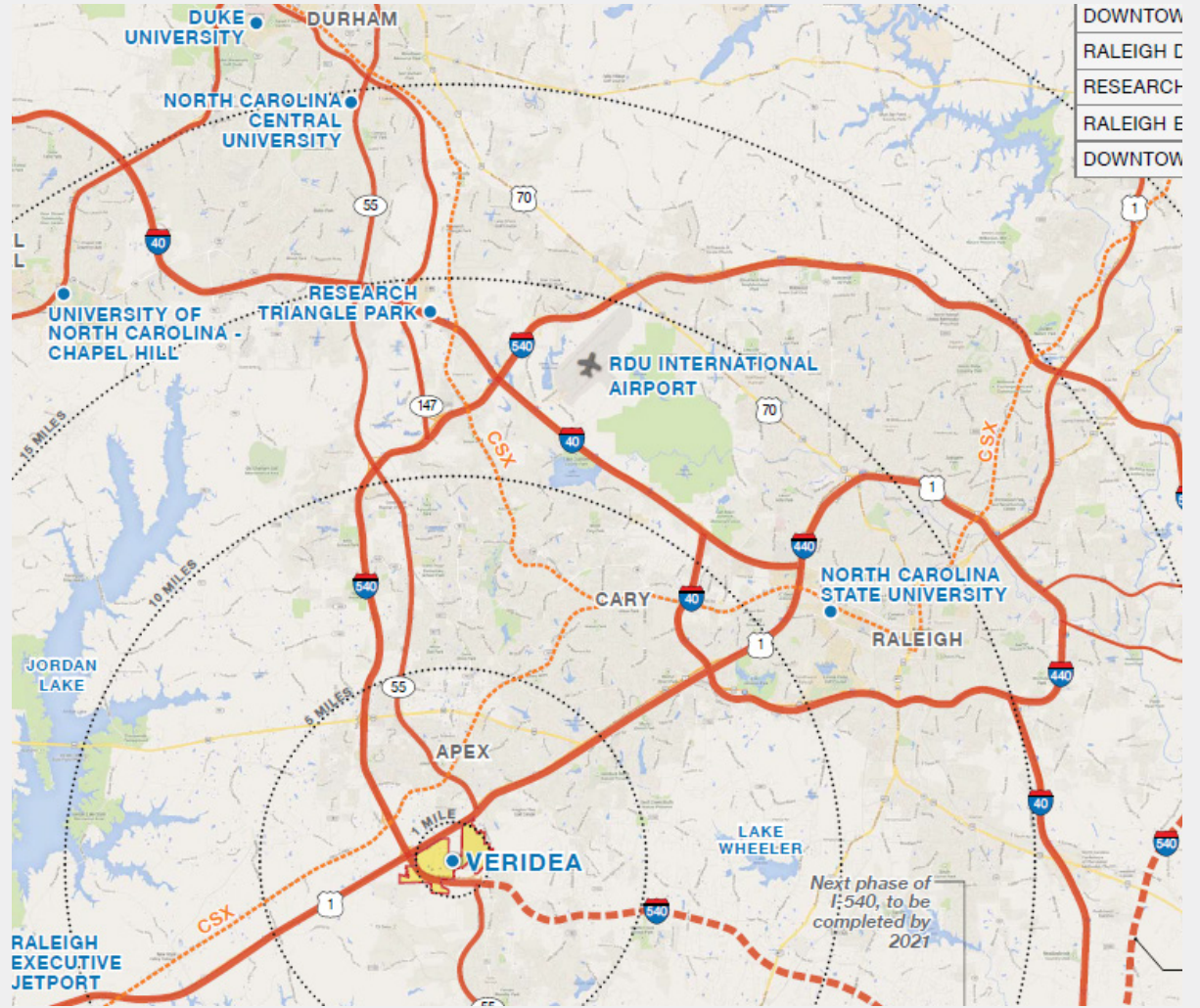
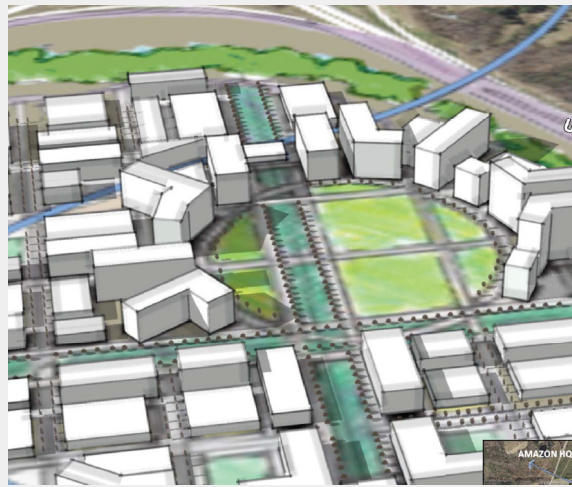
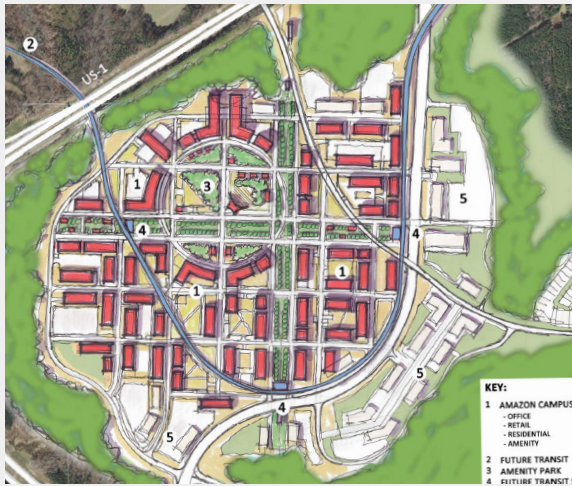
Fiber: 100G ATT fiber currently services Dell EMC at the Property. Level 3, TimeWarner and MCNC are also active in the area

Transit: Wake County is investing more than \$1 billion in new local funds over the next 10 years for new transit, including a tripling of bus service countywide. Apex will have enhanced bus service linkages to Cary and Raleigh, which will provide connections to a robust frequent transit network including four bus rapid corridors, and a 37-mile regional commuter rail line between Wake and Durham counties.

Distance to nearest metro area: 17 miles to downtown Raleigh (MSA pop. 1,273,568).

Distance to international airport: 20 minutes to Raleigh-Durham International Airport (RDU).

Distance to nearest interstate: Veridea is directly served by the 540/Triangle Expressway, the most advanced turnpike in America, providing direct and reliable 70 MPH freeway access to Research Triangle Park via Interstate 40. US Highway 1 and NC Highway 55 borders this site as well.





Move Faster

As our region continues its rapid growth, we're making smart, forward-thinking investments in our infrastructure. Our mobility solutions – like downtown Raleigh's multi-modal transit center at Union Station (pictured) set to open in early 2018 – are business-led. So when it comes time to talk transit needs for HQ2, you're cordially invited to the table.

Get Here & Get Going

Transportation is an increasingly competitive advantage in the Research Triangle region, thanks to ongoing, funded investments in multimodal infrastructure and sustained focus by the community to ensure our market's continued success.

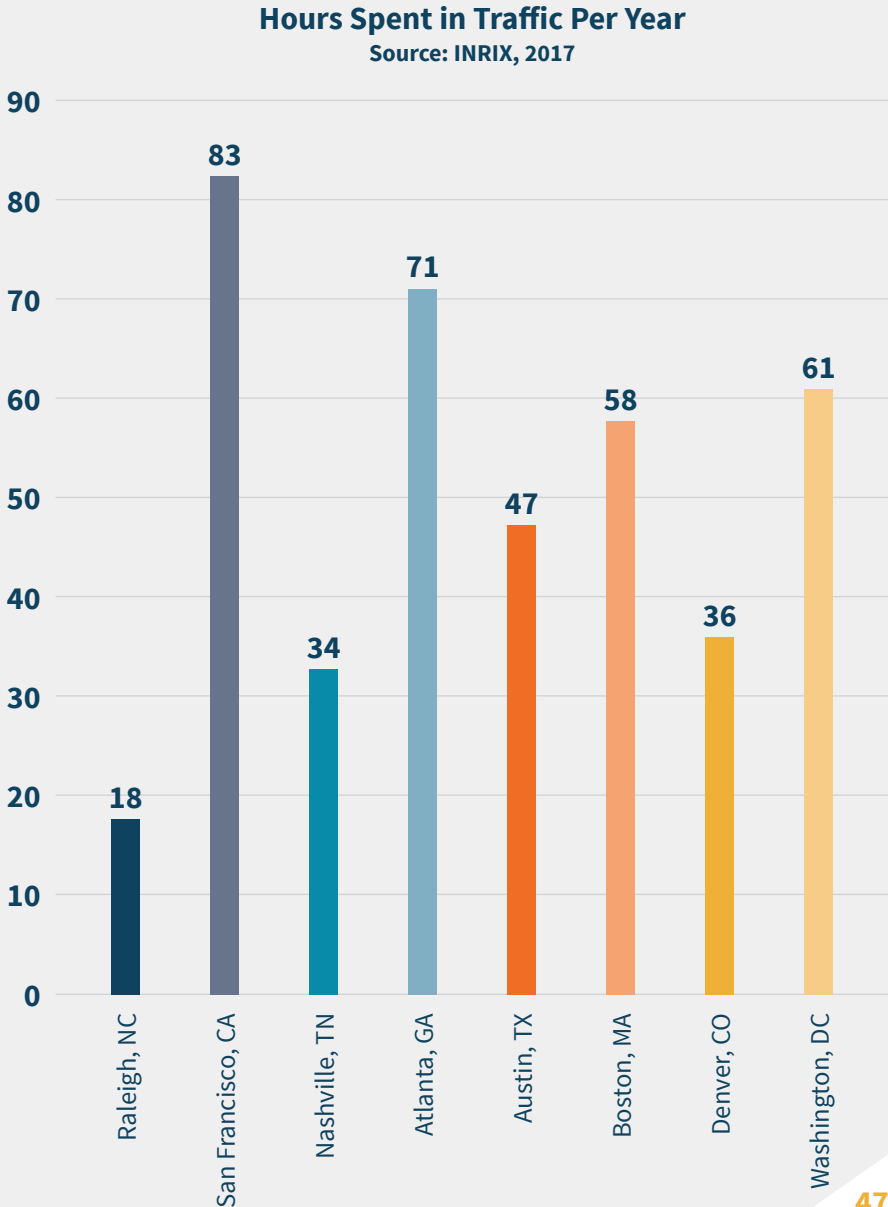
The Triangle region is consistently ranked as having some of the lowest traffic congestion of any major metropolitan area in America. The INRIX Traffic Scorecard released Feb. 2017 measured the level of congestion in cities across the U.S. and the number of peak hours an auto commuter spends in traffic per year. The graph (right) demonstrates the significant amount of time Triangle commuters save in comparison to peer cities.

Business Leadership Transforming Mobility

The regional business community takes an active approach to advancing transit, highway, higher speed rail, and air service priorities through the Regional Transportation Alliance (RTA) business coalition. Created by the chambers of commerce in Cary, Chapel Hill, Durham, and Raleigh, the RTA serves as the respected voice of the regional business community on transportation. RTA combines more than 100 companies and 23-member chambers of commerce in 10 counties to create a powerful, collaborative organization that has advanced strategic transportation priorities for more than 15 years.

Since 2001, the RTA has advanced critical initiatives including:

- The new all-electronic 540/Triangle Expressway turnpike and extension
- Successful \$2 billion transit referendum for Wake County in 2016
- Relief of region's top bottleneck via I-40 widening between Cary and Raleigh
- Launch of a private sector marketing initiative for new nonstop RDU-Paris transatlantic flight
- Innovative traffic relief solutions such as express shoulder lanes



Regional Freeway Network

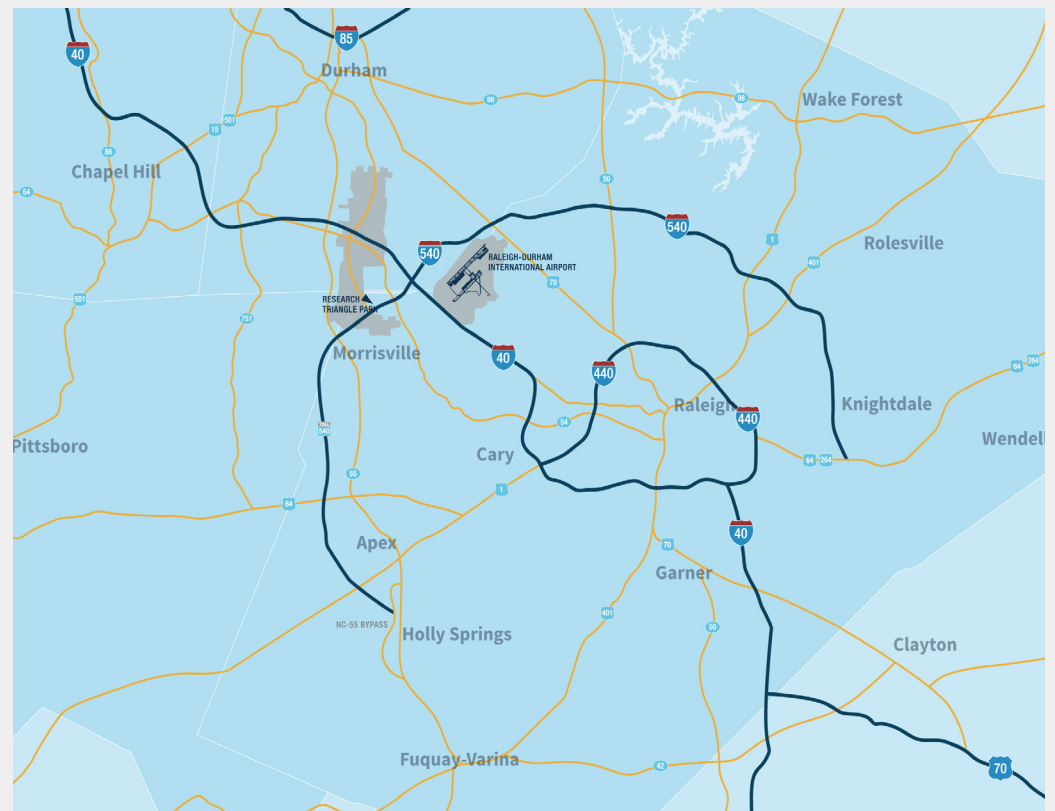
Our region has enjoyed a sustained mobility advantage due to strategic transportation investments based around a data-driven allocation formula, our geographically dispersed population and job centers, as well as the fortuitous location of north-south interstates that redirect through traffic away from our daily commuting routes.

The Triangle's freeway system and road network is anchored by Interstates 40, 85, 87, 95, 440, and 540, and a variety of additional regional freeway connectors. This includes the NC 540/Triangle Expressway turnpike, the most advanced toll road in America which is technologically capable of reading every transponder in the U.S., and **a designated USDOT automated vehicle proving ground**. The region also has approval for a new Interstate designation, I-42 (US 70 east), and the extension of I-87 (I-440 / US 64) to coastal Virginia via US 17.

The region is continuing to make significant improvements in our freeway network as our market grows through local and state funding. Several key projects are currently funded and will be under construction within the next five years including:

- Extension of the 540/Triangle Expressway turnpike to I-40
- New I-885 connection between I-40 and I-85
- Widening of I-40 and I-440
- Conversion to freeway for segments of US 70, US 64, and US 1

Our region will also implement express shoulder lanes on the northern portion of our existing 540 beltway—a lower-cost, scalable solution that will create a mobility option for travelers and transit.



Regional Transit

GoTriangle, the Triangle's regional public transportation provider, offers a variety of transit and vanpool services to the region and outlying counties. Regional bus and shuttle service is available to Apex, Cary, Morrisville, Chapel Hill, Durham, Garner, Hillsborough, Knightdale, RDU International Airport, Research Triangle Park, Raleigh, Wake Forest, Wendell, and Zebulon.

A Major Expansion of Regional Transit Infrastructure:

Thanks to the citizens of all three of our core urban counties—Durham, Orange, and Wake—who passed transit referenda providing locally-controlled, dedicated sales taxes for new transit service, **our region now has more than \$100 million in local funds—annually, in perpetuity—to develop new, enhanced transit service.**

In the western part of the region, Durham and Orange Counties have expanded bus service and are advancing a 17-mile light rail that will connect three major universities, three major medical centers, and numerous residential and commercial areas in Durham and Chapel Hill.

Wake County, the largest county in the region, will dedicate more than \$1 billion in new local funds to triple bus service, expand our frequent transit network (including four bus rapid transit corridors), and initiate a commuter rail line along an existing rail corridor between Raleigh and Durham—all within the next 10 years. Solutions like bus rapid transit and commuter rail are inherently scalable, and will be deployed and expanded quickly as the market changes.

Additionally, unlike many cities, the Triangle has no legacy rail systems to repair, and is leveraging billions of local, state & federal dollars to create new mobility options.

“

We are investing billions in local funds – all approved by voter referenda – to create a flexible, scalable suite of enhanced multimodal transit and transportation options within the next ten years.

– Joe Milazzo II, PE
Executive Director of the Regional Transportation Alliance Business Coalition



Air Service

Earlier this year, Raleigh-Durham International Airport was ranked the most connected medium-sized airport in the U.S., with 50 nonstop destinations and more than 400 daily departures through 10 airlines, including Delta Air Lines which has established RDU as a focus city, as well as newer entrants including Alaska Airlines and Virgin America.

RDU has multiple daily direct flights to key destinations including Seattle, New York, San Francisco and Washington, DC. RDU also has two daily nonstop transatlantic flights to Paris and London—gateways providing travelers with connections to more than 75 destinations in Europe, the Middle East, and Africa.

RDU Airport has been named one of the country's top-10 airports by Condé Nast Traveler. The airport has begun implementing a \$2 billion master plan for its future and that of our region, and has an annual investment by the state of North Carolina for more than \$30 million for infrastructure improvements.

A new international terminal and a renewal project for the terminal serving Southwest Airlines have also elevated the travel experience for patrons of RDU.

The regional business community is committed to growing our international presence in cooperation with RDU Airport, and has allocated hundreds of thousands of dollars in marketing support for expanded service through the Air Service Advancement Project (ASAP) coordinated by the Regional Transportation Alliance business coalition.

Delta and Alaska Airlines operate daily direct flights from RDU to SeaTac.



Advanced Broadband Infrastructure

Our region is committed to developing high-speed broadband across the region, with significant deployment already in place. North Carolina Next Generation Network (NCNGN) is a joint effort to provide gigabit internet service to the region, led by Duke University, North Carolina State University (NCSU), Wake Forest University, the University of North Carolina at Chapel Hill (UNC), and the following six municipalities: Carrboro, Cary, Chapel Hill, Durham, Raleigh and Winston-Salem.

NCNGN is part of an overall statewide investment of over \$140 million in connectivity. A collaborative project is also underway between MCNC, NCSU, UNC, the Wireless Research Center, and the City of Raleigh to build a platform for supporting a variety of wireless technology intended to extend beyond the metro area.

The Triangle has two out of only four metros in the country where Google has chosen to expand their Gigabit Internet service.

Testimonial

Dr. Marc Hoit

Marc Hoit, F.SEI, F.ASCE is the Vice Chancellor for Information Technology & CIO of NCNGN He is also a Professor of Civil, Construction & Environmental Engineering NC State University.

The North Carolina Next Generation Network (NCNGN pronounced “NC Engine”) serves as a great example of how the Research Triangle region came together to solve a critical need – widespread, high speed broadband. NCNGN is focused on stimulating the deployment of next generation broadband networks in the Triangle as a coordinated effort between six municipalities and four leading research universities and supported by local Chambers of Commerce and businesses.

On February 1, 2013, NCNGN, through the Triangle J Council of Governments, issued a Request for Proposals (RFP) inviting one or more private companies to build and operate the desired networks. On April 8th, 2014, the Steering Committee NCNGN unanimously and enthusiastically approved a resolution recommending that its members seek authorization to enter master network development agreements with AT&T. Since then, AT&T has been actively installing fiber optic cable and other equipment in the NCNGN communities, and are now offering their GigaPower services in select areas.

NCNGN is one of only 15 nationally recognized organizations that are part of US Ignite’s Smart Gigabit Communities funded through a grant from the National Science Foundation.

A photograph of the Raleigh Convention Center, a large, modern building with a prominent glass facade and a large mural on its side. The building is surrounded by other city buildings, including a tall, cylindrical tower and a brick building with the 'Sheraton' logo. The scene is set in an urban environment with trees and a highway in the foreground. A dark blue geometric overlay is on the left side of the image.

Go Green

The Raleigh Convention Center (pictured) is one of the most energy efficient convention centers in the nation. With a LEED Silver certification, and the second-largest convention center solar array in the country, the convention center produces 750,000 kWh of electricity each year—roughly equivalent to the annual energy use of 70 homes.

Our Approach to Sustainability

North Carolina has been recognized for its leadership in renewable energy with the first Renewable Energy and Energy Efficiency Portfolio Standard implemented in the Southeast. Our state has the #1 per capita rate of installed solar (#2 in the nation behind California), and is already home to a 104-turbine, Amazon-supported, utility-scale wind farm in Elizabeth City.

The Research Triangle region is home to the largest concentration of smart grid companies in the world, with more than 100 companies working to modernize the grid and deploy renewables. More than 350 cleantech and sustainability companies are here, including HQs for Cree, ABB North America, SAS, Red Hat, Sensus, Veolia Water Technologies, and Trilliant.

Our region's strengths in analytics and Internet-of-Things (IoT) drive

our sustainability efforts. The Town of Cary has been recognized for turning existing infrastructure into a simulated smart city, inviting private-sector companies to test IoT solutions for parking, energy and utilities, public safety, traffic management, citizen engagement, and IT co-creation.

Additionally, the Town of Chapel Hill is collaborating with AT&T to build a smart city framework that will better connect residents to the town.

Local universities also play a role in fostering sustainability in our region. NC State University regularly convenes local governments around smart cities issues and is a member of the MetroLab Network, along with the City of Raleigh. UNC Chapel Hill hosts the annual Clean Tech Summit to connect students, academic, and industry leaders around smart cities and cleantech issues.

Testimonial

Susan Sanford

Susan Sanford is the Executive Director of the Research Triangle Cleantech Cluster, an initiative of business, government, academic and nonprofit leaders focused on accelerating the growth of the Research Triangle Region's cleantech economy.

Thank you for considering the Research Triangle Region as a destination for your HQ2. One element which distinguishes our Region from others is our unique concentration of more 350 cleantech companies focused on developing and deploying sustainable solutions across the globe. These solutions address the world's most critical problems related to climate change and the stewardship of our natural resources. The Region is home to companies who are focused on deploying cutting edge renewable energy solutions, creating components critical to the development of electric vehicles, and producing technologies which drive energy efficiency and create clean water. Given your commitment to renewable energy and sustainability, we believe you will find an excellent group of like-minded stakeholders in this Region.



A Data-Driven Quality of Life: Triangle Smart Cities Initiative

When thousands of UNC-Chapel Hill students flooded Franklin Street after the men's basketball national championship game in April, Chapel Hill town staff were watching.

Using data collected by cameras and sensors that track traffic, they were able to strategically place fire crews and emergency medical personnel to keep the students – celebrating with bonfires in the middle of the street – as safe as possible.

“We had a fabulous celebration that was very safe and celebratory but also had very few incidents,” said Pam Hemming, Mayor of Chapel Hill. “So those sensors help us make real-time decisions.”

A smart city is defined as one that taps technology to infuse understanding of and build a solution for a variety of issues facing modern cities and communities. Smart cities can connect, monitor and analyze incredible amounts of data and use that information to make smarter decisions.

Here in the Triangle, we believe that smart, connected communities, enabled by amazing technology, are critical to maintaining health and happiness for our citizens.

Whether monitoring traffic counts, water and air quality or water lines for leaks, sensors and other evolving technologies are increasingly being used by cities in the Triangle to make more informed, real-time decisions. These types of projects already are underway across our region:

- In Cary, sensors on water meters can detect if there is a leak to let homeowners know long before they would normally receive an elevated bill.
- In Raleigh, solid waste trucks have sensors to track their locations.
- Chapel Hill is experimenting with scanning parking lots to track empty spaces and let drivers know where parking is available in real time.
- Durham is working with the Department of Transportation to put in a new high-speed fiber network to enable more automated traffic management.

N.C. State University, UNC-Chapel Hill and Duke University researchers are imagining new ways to make cities run more effectively using data. NCSU researchers are working on developing technologies to support 3-D city planning and personal rapid transit vehicles.





Quality of Life

If there's sidewalk chalk dust in the air, it must be SPARKcon season in Raleigh. SPARKcon is a free, multi-day festival that takes over 1.9 million square feet of Downtown Raleigh to showcase over 2,000 artists in 200 events. In addition to beautiful sidewalk art, 30,000+ festival attendees can admire and participate in creative programming focused on dance, music, visual art, literature and performance art.

Diverse, Vibrant, Affordable, & Charming

**Living in the Research Triangle—
a place Amazon Employees will love.**

The Triangle has maintained its status as an attractive and affordable to place to live. An effort in the early 2000s to revitalize our downtown areas has resulted in even more growth—particularly among the millennial generation.

The Triangle's two largest cities – Raleigh and Durham—are vibrant communities that feature a mix of new and established living and office spaces surrounded by restaurants, galleries, and parks. Our suburban communities feature quaint town centers and neighborhood communities. Drive 25 minutes into the country, and you'll find yourself among rolling hills and open farmlands. There's something for everyone here.

Housing is a major contributing factor to the Triangle's low cost of living. In 2016, the Cost of Living Index placed Durham and Raleigh's housing costs at 72.1 and 69.3, respectively. Compare that to Boston, MA, where housing costs more than double the national average at 201.2.

In July 2017, the National Council for Home Safety named the Town of Cary (located in Wake and Chatham counties) one of the top-100 safest cities in America. The Research Triangle was also ranked #1 against competitive metros in the FBI's 2015 Crime in the U.S. report.

25.9 mins
Median Commute Time

\$239,550
Median Home Price

49°F / 89° F
Average Jan - July High Temp

85+
Music Venues

\$1,403
Median Rent

217
Average Sunny Days

160+ miles
Recreational Trails

35+
Breweries

All Are Welcome Here

While you're bound to come across a few southern twangs here in the Triangle, that's not all you'll find. Talent brought in by local universities and businesses, as well as an increase in foreign direct investment activity, has made the Triangle one of the most diverse regions in North Carolina.

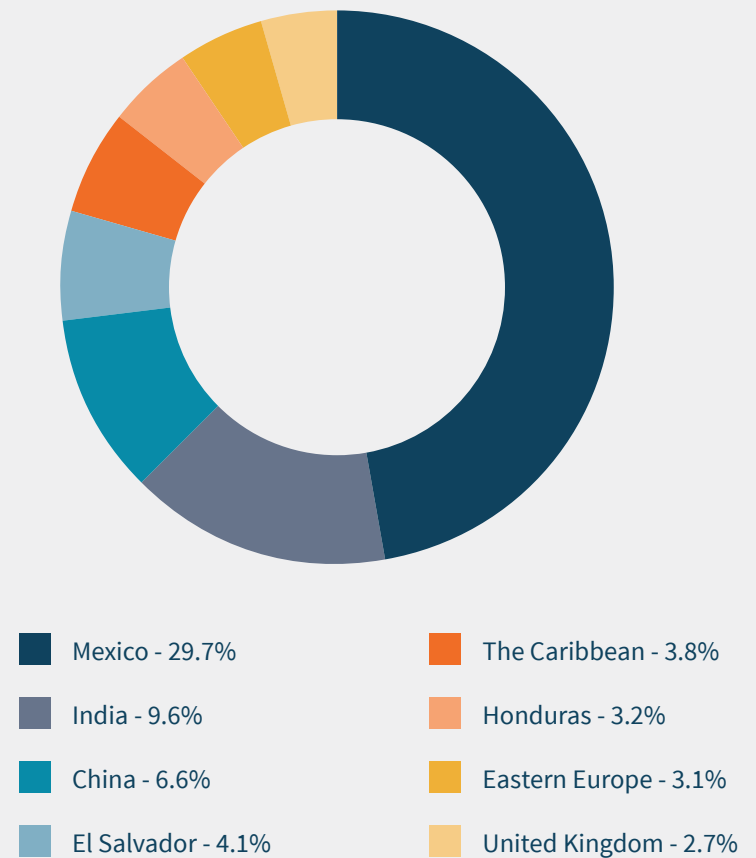
Our diverse population has greatly contributed to the Triangle's cultural, educational, artistic and recreational offerings. Since 1985, the International Festival showcases music, dance, cuisine, art, and cultural education from 55 diverse cultures, and welcomes 30,000 visitors annually.

There is also a very large and active Triangle Cricket League with a dozen teams. And the Triangle Badminton Club recently celebrated the opening of a new, state-of-the-art badminton facility in Morrisville, NC. And North Carolina FC, our professional soccer team, is a source of pride for soccer (or football) fans of every race, creed and country of origin.

38.6%
of the Triangle's population
was born in another state

11.9%
of the Triangle's population
was born in another country

Foreign Born Population



Seattle Freeze, Meet Southern Hospitality

Here in North Carolina, Southern Hospitality is more than just about being polite—it's a way of life. Move into the area and your freezer will soon be stocked with freshly baked goods from your neighbors, and you'll be peppered with invitations to join the neighborhood book club, or the community intramural sports team. North Carolinians are known for their eagerness to welcome newcomers and help them feel at home in our state. For companies that choose to locate here, this culture of altruism is an added assurance that their employees will be comfortable here.

The Research Triangle takes that a step further. Residents here—whether they're transplants or born and raised—have deep sense of civic pride. People who live here love it, and they want everyone to share in their excitement. And with so much to do and see and be a part of, newcomers to the Triangle immediately find opportunities to make connections and get involved in the community.



A Statement on HB2

Testimonial: Greg Winkler

Greg Winkler is the Former Board Chair of The Greater Raleigh Chamber of Commerce & the Regional Business Banking Manager for Wells Fargo.

The Public Facilities Privacy & Security Act (HB2) was passed into law by the North Carolina General Assembly in early 2015, and the Greater Raleigh Chamber of Commerce, along with area partners, responded swiftly and decisively to address the uncertainty this legislation would create regarding our market's ability to attract and retain employers and a talented workforce. Within days of the bill's passage, the Greater Raleigh Chamber called for a full repeal of the legislation and worked proactively with partners across

the state to reach a bipartisan solution that maintained our competitive economic and business environment.

Our community's growth and success depends upon attracting and retaining top talent and companies in our region. These companies value diversity, inclusion, and equality – values that Raleigh, Wake County, and the Triangle-region have embraced for many years. To further demonstrate our commitment to these values, the Chamber launched the "All Are

Welcome Here" media campaign in an effort to restore our area's reputation as an inclusive community, welcoming to all individuals. The Chamber was joined by Triangle-area partners in this campaign to demonstrate our market's long-standing commitment to inclusion and equality which makes our area a top destination to live and do business.

HB2 negatively impacted business growth and economic prosperity in our market as well as publicly damaged North Carolina's

reputation as a high-growth, progressive, affordable state in which to live and do business. We are proud of the collaborative efforts to ensure our market remains best in class. We are fortunate to have the opportunity to be an influential and thoughtful voice throughout this process. These efforts were realized during the 2017 session of the North Carolina General Assembly, when HB2 was repealed – gathering votes from assembly members of both parties and signed by Governor Roy Cooper.



The Triangle Isn't Just For One Type Of Person

Quality of life means different things for different people. And while we've selected some of our favorite activities to share with you, with such a dynamic and fast-growing region, one of the best parts about living in the Triangle is that there's something for everyone.

In June 2016, the City of Raleigh released the BikeRaleigh App. Packed with information about on-road and off-road facilities, app users can tailor their cycling experience based on their skill and comfort level.

For Road Warriors...

When it comes to biking, we can't think of a better place to ride. Riders and runners can access more than 160 miles of urban greenways and trails across Raleigh, Durham and Chapel Hill—which connect to residential areas, community parks, and shopping centers. Raleigh, Durham and Chapel Hill have also installed bike lanes on designated city corridors.

Seeking wide open spaces? Just outside the Triangle's urban areas, you'll find plenty of open farmland and peaceful two-lane roads. And with four supremely mild seasons, dedicated cyclists can hit the road any time of year.

The Neuse River Greenway Trail is a 33-mile long paved greenway. As one Reddit user put it, this trail is

a “beltline for cyclists,” connecting to both the Walnut Creek Trail and the Crabtree Creek Trail, making it easy for cyclists to access Downtown Raleigh and North Raleigh.

The American Tobacco Trail is a 22.6-mile long Rails-to-Trails project crossing through Wake, Durham and Chatham Counties. The flat, partially-paved trail begins in Wake County and runs all the way to Downtown Durham.

The Reedy Creek Trail links William B. Umstead State Park to Meredith College, passing through the North Carolina Museum of Art along the way. The five-mile trail is paved with asphalt and concrete.

...And Trail Blazers

The Mountains to Sea Trail is North Carolina's state hiking trail. It stretches 1,175 miles from the Great Smoky Mountains to the Outer Banks. Triangle residents can hike all or part of a 77.4 mile segment of the trail that crosses through Durham and Wake Counties.

William B. Umstead State Park, Raleigh, NC: Hikers, trail runners, bicyclists and equestrians cherish Umstead State Park. Trailheads on both sides of the 5,999-acre park surround three manmade lakes which offer canoe and rowboat rentals. Fishing is welcome at all the lakes and connecting tributaries. At both access areas, picnic grounds surround shelters with fireplaces that can be reserved, along with primitive campsites, cabins and more.

Eno River State Park, Durham, NC: Eno River State Park—like its namesake—flows near urban areas of Durham and Orange counties with five access areas minutes from town amenities. The Eno River's waters roll past mature forests, historic mill and home sites and river bluffs covered with flowering shrubs and across fords used by early settlers. The park offers nearly 30 miles of trails along a swift, shallow stream that's popular with anglers, photographers and sightseers.

Occonechee Mountain State Natural Area, Hillsborough, NC: Occonechee Mountain, the tallest spot in the Triangle, will require some climbing, but the payoff—an expansive view from the peak, some 350 feet above the Eno River—is worth the effort.

“

[The Triangle] is an area where it's easy to be outdoors. It has many of the amenities of a larger metropolitan area yet offers an escape that is only minutes away from anywhere in the area. All of this, coupled with a diverse array of affordable areas to reside and strong education, make it a great place to live and raise a family.

– Todd Olson,
Chief Executive Officer & Founder, Pendo

Sports Travel Magazine rated the Triangle as one of the hottest sports destinations in the country.



Durham - Foodiest Town in the South

...For Foodies

Given North Carolina's rich agricultural heritage, it's safe to say that our residents are really into their food. Restaurants in the Triangle run the gamut from small plates to authentic regional Asian cuisines to food truck operators opening brick-and-mortar locations. Just this year, four local chefs were nominated for the James Beard Award.

The local craft brewery scene across the Triangle continues to grow. With more than 35 breweries across the region, there's a pint for everyone. The scene has also been recognized on a national scale. At the 2017 U.S Open Beer Championship, Lynnwood Brewing Concern of Raleigh came in at No. 3 in the contest of more than a hundred nation-wide breweries.

...And Sports Fanatics

There are five professional sports teams in the Research Triangle Region: The NHL's Carolina Hurricanes who play at a state-of-the-art arena seating more than 20,000 screaming fans. Baseball lovers have two choices: the Carolina Mudcats and the Durham Bulls. And for soccer enthusiasts, there's North Carolina FC and the NC Courage, who won the NWSL's national championship in 2016.

But when you get to the heart of the matter, the region is best known for its collegiate sports teams including ACC legends: NC State Wolfpack, the UNC Tar Heels and the Duke Blue Devils.



...And Creative Geniuses

It doesn't matter if you're in the mood for Monet, Mozart or Maroon 5 – the Triangle has you covered, with numerous arts venues and festivals to keep you entertained.

Head to Downtown Raleigh to catch a show with the North Carolina Symphony, North Carolina Opera, the Carolina Ballet, or the North Carolina Theatre. The Duke Energy Performing Arts Center and the Durham Performing Arts Centers bring Broadway to the Triangle.

The North Carolina Museum of Art: Located in Raleigh and long regarded as “the Smithsonian of the South,” NCMA is one of many free cultural attractions in the region.

SparkCon: SPARKcon is a free arts festival that takes over 1.9 million square feet of Downtown Raleigh to showcase over 2,000 artists.

Hopscotch Music Festival: With 120 bands over 4 days in September, Hopscotch is known for adventurous lineups, memorable performances, and a fan-friendly atmosphere. From large outdoor main stages in Raleigh City Plaza and Red Hat Amphitheater to intimate club shows, the festival features music in almost every genre imaginable—rock, hip-hop, metal, folk, electronic, experimental, and more.

Full Frame Documentary Film Festival: Each spring, Full Frame welcomes filmmakers and film lovers from around the world to historic downtown Durham, North Carolina, for a four-day, morning-to-midnight array of nearly 100 films, as well as discussions, panels, and Southern hospitality. Set within a few city blocks, the intimate festival landscape fosters community and conversation among filmmakers, film professionals, and the public.

Moogfest: Since 2004, Moogfest has brought together artists, futurist thinkers, inventors, entrepreneurs, designers, engineers, scientists, and musicians. By day, Moogfest is a platform for conversation and experimentation. By night, Moogfest presents cutting-edge music in venues throughout the city.

Wide Open Bluegrass: This is THE urban bluegrass music festival located in downtown Raleigh. This event closes out the International Bluegrass Music Association's World of Bluegrass week. Over two days, attendees will hear eighteen incredible acts from Bluegrass Hall of Famers, emerging stars, and one-of-a-kind jams.



For Picnic Pros...

Dorothea Dix Park - Raleigh, NC:

Dix Park is home to winding trails, open fields, and tree-lined avenues, community events and concerts, and a great view of Downtown Raleigh. Last year, the city of Raleigh announced it had hired world-renowned landscape architect Michael Van Valkenburgh and a team of local and national experts to develop a master plan for the park.

Sarah P. Duke Gardens - Durham, NC: Each year, more than 300,000 people visit Duke Gardens, a 55-acre

gem located on Duke University's campus. Considered one of the premier public gardens in the U.S., it is truly a place of beauty.

The Park at the North Carolina Museum of Art - Raleigh, NC: The Ann and Jim Goodnight Museum Park connects art, nature, and people. It features temporary and permanent public art installations, environmentally sustainable landscapes, colorful gardens, miles of recreational trails, and a terraced pond.



...And the Escape Artist

When you're ready to get away from it all, the Triangle really delivers. Located just two hours from the beach and three hours from the

North Carolina mountains, our residents can exercise a lot of choice when it comes to vacationing.

Living & Learning in the Triangle

One of the major benefits of having so many smart people in the area is that everyone—residents and leaders alike—understands the value of a quality education.

Most of North Carolina's 115 school systems are county-based – meaning individual counties oversee the operation, management, assignment, and performance of the schools within their district.

Across the board, school districts in the Research Triangle region tout some impressive statistics: #1 for Gold Standard Teachers, The Highest Average SAT Score, and the Most National Board-Certified Teachers in a School District in the country. 47 Nationally-Ranked High Schools call the Research Triangle Region home and 27 Triangle schools made The Washington Post's 2016 list of "America's Most Challenging High Schools."

Recognizing that student's interests and abilities differ, Triangle school systems are always seeking out new, specialized programs to better serve students. Oftentimes this is in partnership with businesses, universities, community colleges, and economic development organizations.

The region's 36 public charter schools and 121 private schools also offer competitive alternatives to public schools.

Great Schools:

Brentwood Magnet Elementary School of Engineering – Raleigh, NC: Students at Brentwood explore real-world challenges in the classroom and in their "Makerspace," where they are guided by their classroom teacher and a STEM Coordinator. Through learning the engineering design process, students are taught to design,



The North Carolina School of Science and Mathematics is the nation's first public residential high school focused on science, technology, engineering, and math.

build, test, and improve. Brentwood partners with N.C. State University's College of Engineering, and uses the Engineering is Elementary program developed by the Museum of Science in Boston.

Centennial Campus Magnet Middle School - Raleigh, NC: Coming together with North Carolina State University, as well as its corporate and government partners, Centennial Campus Magnet Middle School (CCMMS) is the premiere University Connections and Leadership magnet middle school in Wake County. Through instruction in Dr. Stephen Covey's 7 Habits of Highly Effective Teens and a focus on science, technology, engineering, and mathematics, CCMMS prepares its students to actively discover, integrate, and apply knowledge in a dynamic global and technological environment.

NC School of Science and Math - Durham, NC: NCSSM's mission is to educate academically talented students to become state, national, and global leaders in science, technology, engineering, and

mathematics; advance public education in North Carolina; and inspire innovation for the betterment of humankind, by offering challenging residential, online, summer, and virtual learning opportunities. NCSSM is the nation's first public residential high school focused on science, technology, engineering, and math. NCSSM models how a statewide approach to collaboration and the use of physical and virtual spaces can create tremendous innovation in public education. NCSSM graduates have gone on to become leading scholars, scientists, doctors, authors, lawyers and more.

Wake Early College of Health & Sciences - Raleigh, NC: Wake Early College of Health and Sciences (WECHS) is an application school focused on health and sciences. WECHS provides students with opportunities to explore careers in the health and sciences through partnerships with Wake Tech and WakeMed Health and Hospitals. This five-year public high school program allows students to earn their high school diploma and an





Associate degree, college transfer credit, prerequisite courses to prepare for health sciences degree, or certificate.

The Exploris School - Raleigh, NC:

The Exploris School is a K-8 charter school committed to providing a global education. Since opening in 1997, their instructional approach has been based on preparing students for life in an interconnected world. Exploris brings together project and community-based learning to inspire a global understanding.

Durham School of the Arts -

Durham, NC: Durham School of the Arts is an active and dynamic center for arts and academic education. Located in downtown Durham, North Carolina, success at DSA is based on implementing shared values of diversity, respect and creativity.

Raleigh Charter High School

- Raleigh, NC: For highly motivated students, RCHS touts an interconnected learning environment that combines a

demanding college-preparatory education with a curriculum that teaches and models citizenship skills. They also involve students in many resources of downtown Raleigh—the government, performing arts, social services and the international community.

Chatham School of Science & Engineering - Siler City, NC:

The Chatham County School of Science and Engineering opened in August 2016 and focuses on Science, Math, Engineering, and advanced course options, offering a high school diploma and an Associate's Degree with no tuition costs.

Research Triangle High School -

RTP, NC: This independent public charter high school focuses on a STEM curriculum. Located in RTP, the school collaborates with many Park companies such as Biogen and the NC Biotech Center.



Incentives & Letters of Support

North Carolina and Research Triangle leaders from all facets of our state and region – government, academia, business and community – have rallied around Amazon HQ2. Here you'll find a group of engaged and willing partners ready to collaborate, co-create, and welcome you to the Research Triangle from Day 1.

Incentives Statement

The State of North Carolina has incentive programs for competitive projects to help offset costs to companies for locating or expanding businesses in the state.

The state's flagship program, the Job Development Investment Grant (JDIG), is a performance-based, discretionary incentive that provides cash grants directly to new and expanding companies. The amount of the grant is based on a percentage of the personal income tax withholdings associated with the new jobs.

The amount of a JDIG award is calculated by weighing a number of factors to determine its potential value, including the location of the project, the county tier designation, the number of net new jobs, the wages of the jobs compared to the county average wage, the level of investment and whether the industry is one of the state's targeted industry sectors.

Recently, changes have been made to enhance the JDIG program with the creation of a high-yield provision for any company that creates at least 1,750 jobs and invests at least \$500 million, as well as the creation of a transformative project provision for any company that creates at least 5,000 jobs and invests at least \$4 billion. These provisions allow for an award to include a higher withholdings tax percentage and a greater number of years that payments may be received.

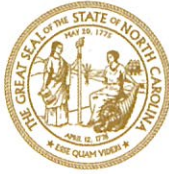
If this project were to be treated as a single project with a 15-year ramp up of 50,000 jobs and a total investment of \$5 billion, an estimated JDIG award would be approximately \$2 billion. Such an award would require changes to the existing program statutes by the North Carolina General Assembly.



See page 76 for a letter of support from the North Carolina General Assembly Leadership.

*Office of the Governor
State of North Carolina*

*Roy Cooper
Governor*



*20301 Mail Service Center
Raleigh, N.C. 27699-0301*

October 5, 2017

Mr. Jeff Bezos, Founder & Chief Executive Officer
Amazon.com, Inc.
Office of Economic Development
c/o Site Manager Golden
2121 7th Avenue
Seattle, WA 98121

Dear Jeff:

For years, North Carolina has been known as the State of Minds, and that's why we offer the ideal location for HQ2.

For the past half-century, we have invested heavily in human capital, from creating an early childhood program that has been a model for most states, to nurturing a community college and university system that has transformed laborers into geeks and tech trailblazers.

North Carolina's commitment to education is in our bloodstream. We opened the nation's first public-university in Chapel Hill, N.C., in 1795. My administration is working to make North Carolina a Top 10-Educated State by 2025. There is nothing more important to me than making meaningful, measurable investments in education from birth through college and throughout a person's career. In North Carolina, education is synonymous with opportunity, and that's why we cherish it so much.

North Carolina has earned a reputation for cool, and that's why we are attracting young people. Only three states have higher in-migration. And our people are diverse. The children in most of our urban public schools live in homes that speak nearly 100 languages or dialects.

North Carolina cities and towns are buzzing with music festivals, street fairs, micro-breweries and sports. The Blue Ridge Parkway and the Outer Banks are within easy reach for a weekend. We must warn you – when people move to North Carolina, they never want to leave.

Mr. Jeff Bezos
October 5, 2017
Page 2

In North Carolina, we are fervent about growing the infrastructure that companies like Amazon demand. We protect our environment – including three mountain ranges, 300 miles of coast and 38,000 miles of rivers and streams.

Yet North Carolina has built a business-friendly economy that growing companies love. We are consistently recognized as one of the leading states in the nation by publications like *Forbes* and *Chief Executive* magazine.

Finally, I want to tell you that North Carolina is a welcoming state. Like every family with an embarrassing uncle or two, we have a few politicians who want it to be 1957 instead 2017. But here in North Carolina, you'll find authentic people who respect others, who love our families, people who work hard and are loyal to the state in which we live.

The State of Minds is open. We are optimistic. We will provide the ingredients to replicate your Day 1 culture. Let the conversation begin.

With kind regards, I am

Very truly yours,

A handwritten signature in black ink, appearing to read "Roy Cooper". The signature is fluid and cursive, with the first name "Roy" being more prominent and the last name "Cooper" following in a similar style.

Roy Cooper

RAC/sm

Congress of the United States
Washington, DC 20515

October 13, 2017

Mr. Jeffrey P. Bezos
Founder and Chief Executive Officer
Amazon.com, Inc.
Office of Economic Development
c/o Site Manager Golden
2121 7th Avenue
Seattle, Washington 98121

Dear Mr. Bezos:

North Carolina is home to several high-growth communities, each of which would be excellent locations for Amazon's new headquarters. As members of North Carolina's Congressional delegation, we wish to offer our support for locating your new headquarters in our state, and extend the offer to provide any information you might need as to why North Carolina is an ideal place for Amazon to call home.

One of the best indicators of North Carolina's reputation as a magnet for businesses and families is our nation-leading growth. Since 2010, our population has grown by 6.4%, with last year's net growth outpacing that of the nation overall. Hundreds of thousands pick up and move to North Carolina for our climate, commitment to education, and wonderful business environment. The evidence is clear as the number of those identifying as "North Carolinians" increases every day.

We also understand Amazon will need to draw from a pool of talented, highly-skilled workers. North Carolina's world-class research universities produce much of the talent that fuels the robust technology sector that already exists in the state, with more than 125,000 North Carolinians working in the industry. In addition, North Carolina is the highest ranked state for women in the tech sector, and second in Southeast U.S. for STEM program completions. For these, and many more, reasons, we believe North Carolina is an ideal home for Amazon. As you work to narrow down the possibilities across the country for this impressive headquarters plan, please do not hesitate to contact any member of the North Carolina delegation if we can provide you or your team with additional details about the state.

We look forward to working with you on this exciting opportunity.

Sincerely,

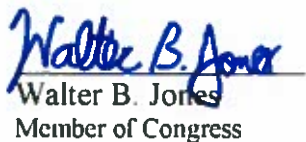


Richard Burr
United States Senator

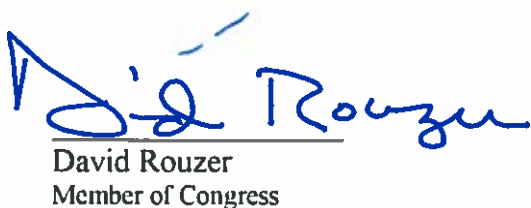


Thom Tillis
United States Senator


G. K. Butterfield
Member of Congress

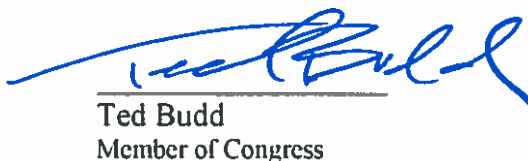

Walter B. Jones
Member of Congress


Virginia Foxx
Member of Congress

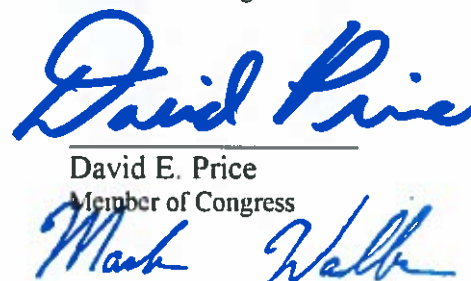

David Rouzer
Member of Congress


Robert Pittenger
Member of Congress


Mark Meadows
Member of Congress


Ted Budd
Member of Congress

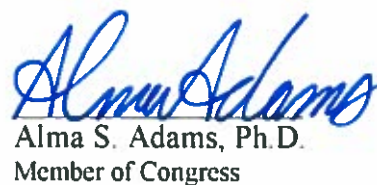

George Holding
Member of Congress


David E. Price
Member of Congress


Mark Walker
Member of Congress


Richard Hudson
Member of Congress


Patrick McHenry
Member of Congress


Alma S. Adams, Ph.D.
Member of Congress



NORTH CAROLINA GENERAL ASSEMBLY
LEGISLATIVE BUILDING
RALEIGH 27601

October 19, 2017

Mr. Jeff Bezos
Founder and Chief Executive Officer
Amazon.com, Inc.
Office of Economic Development
c/o Site Manager Golden
2121 7th Avenue
Seattle, WA 98121

Dear Jeff,

As leaders of the North Carolina General Assembly, we would like to add our support to the proposals from North Carolina communities encouraging you to consider a second Amazon headquarters in our state.

Through our legislative efforts, we are constantly working to make North Carolina the most attractive state in America in which to do business.

Over the last six years, the General Assembly has enacted historic tax reform through multiple reductions and simplifications to our state's corporate and personal income tax rates. Today, businesses in North Carolina enjoy a corporate income tax rate that is already one of the nation's lowest and will be further reduced to 2.5 percent in 2019, along with single sales-factor apportionment that will be fully phased in by 2018. We have also streamlined and lowered the personal income tax rate from a marginal rate of 7.75 percent to 5.25 percent beginning in 2019.

In addition, we recently passed comprehensive legislation to better welcome transformational projects, including an expansion of the state's two major incentive programs for projects planning to create more than 4,000 jobs. We would be open to discussions about further modifications to accommodate a project of your scope and size.

We believe these policies only strengthen North Carolina's reputation as a leader in job growth that counts among its assets its workforce, public education system, infrastructure and unmatched quality of life. Here is where we stand out in just a few of the recent national rankings:

- Most dramatic improvement in the Business Tax Climate Index 's history—from 44th to 15th in one year (Tax Foundation 2015)
- No. 1 Most Competitive State (Site Selection 2015)
- No. 2 Best Business Climate (Site Selection 2015)
- No. 2 Best State for Business (Forbes 2016)
- No. 3 Best State for Business (Chief Executive 2016)
- No. 3 Lowest State & Local Tax Burden on Business (E&Y/COST 2015)
- No. 4 Best Regulatory Environment (Forbes 2015)
- No. 5 Lowest Business Costs (Forbes 2015)
- No. 5 America's Top States for Business (CNBC 2016)
- Winner of Site Selection's 2016 Prosperity Cup (Site Selection 2016)
- 11th Best Tax Climate in the Nation (Tax Foundation 2016)

We trust that you will experience an enviable partnership among the General Assembly, the Governor, the N.C. Department of Commerce and economic development organizations on this effort. We look forward to working with you and your team on further exploring North Carolina as the best location for Amazon's HQ2.

Sincerely,



Phil Berger
President Pro Tempore
North Carolina Senate



Tim Moore
Speaker
North Carolina House of Representatives

October 10, 2017

Ryan Combs, Executive Director
Research Triangle Regional Partnership
8000 Weston Parkway, Suite 340
Cary, NC 27513

Dear Ryan,

This letter is to express support for the region's application as a potential site for Amazon HQ2.

The Regional Transportation Alliance (RTA) is the regional business community's voice for transportation in our growing market. We believe that our current and future mobility is a strong competitive advantage, for both Amazon and other expanding companies.

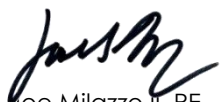
The Research Triangle region enjoys comparatively low roadway congestion for a growing region. Thanks to the bipartisan strategic transportation investments legislation, we have a number of funded, accelerated investments in freeway infrastructure coming online during the next few years to help keep it that way. In addition, each of our three core counties—Wake, Durham, and Orange Counties—have passed voter referenda this decade to secure dedicated, locally-controlled funds to create a robust suite of flexible, scalable enhanced transit options over the next ten years. Having the most-connected medium sized airport in the United States rounds out a strong portfolio of transportation advantages.

Of course, the existence of a strong, engaged regional business community with a track record of success in working in concert with our public sector to advance more than \$2 billion in new and enhanced transportation infrastructure over the past 15 years is also a unique competitive advantage for our market.

We have compiled more information about the mobility case for investment here via the following website: letsgetmoving.org/RTAcaseforHQ2 as well as in this 2-page overview: letsgetmoving.org/RTAMarketOverview.

Thank you for your leadership on advancing transformational economic development opportunities for our region. If you have any questions, please contact us at 919.664.7065 or joe@letsgetmoving.org.

Best regards,



Joe Milazzo II, PE
Executive Director
Regional Transportation Alliance

Constituent Universities

Appalachian
State University

East Carolina
University

Elizabeth City
State University

Fayetteville State
University

North Carolina
Agricultural and
Technical State
University

North Carolina
Central University

North Carolina
State University
at Raleigh

University of
North Carolina
at Asheville

University of
North Carolina
at Chapel Hill

University of
North Carolina
at Charlotte

University of
North Carolina
at Greensboro

University of
North Carolina
at Pembroke

University of
North Carolina
at Wilmington

University of
North Carolina
School of the Arts

Western Carolina
University

Winston-Salem
State University

Constituent High School

North Carolina
School of Science
and Mathematics

An Equal Opportunity/
Affirmative Action Employer

October 16, 2017

Mr. Christopher Chung
Chief Executive Officer
Economic Development Partnership of North Carolina
15000 Weston Parkway
Cary, North Carolina 27513-2118

Dear Mr. Chung:

On behalf of The University of North Carolina System, I am pleased to provide this letter of support for North Carolina's proposal to Amazon for the establishment of its planned HQ 2 facility. I'm also pleased to include brief summaries of our 17 constituent institutions demonstrating the scope of instructional capabilities, research strengths, and quality of graduates that would benefit Amazon should it select our state for its HQ 2 site.

My staff and I are fully committed to supporting your effort to present the case for location of the Amazon project in North Carolina. Set forth below are a number of factors that highlight and confirm the role the University has played both in the education of our citizens and in support of economic and community development.

In 1789, North Carolina became the first state to open a public university to students. The legal authority and mandate for the University was set forth in the state's first Constitution which provided, "That a school or schools shall be established for the convenient instruction of youth --- and all useful learning shall be duly encouraged and promoted."

This mandate has guided the development of what is today a System comprised of 16 universities and one of the nation's best public residential high schools of science and math. Our constituent institutions are diverse and vary in size and focus, including several large-scale research intensive campuses, five historically black institutions and a growing number of regional institutions.

Collectively, our institutions enroll more than 225,000 students annually; and, given the continuing, strong in-migration of working age adults, projections for enrollment growth are significant. Research activities at our 16 campuses currently exceed \$1.3 billion annually. Much of this research activity has been undertaken at our two major research campuses – UNC-Chapel Hill and NC State; but, the level of research activity at NC A&T, UNC Charlotte, ECU and other growing regional campuses is quickly increasing.

All of our institutions are actively engaged with the communities they serve and within the state's economic development infrastructure. Our land-grant institutions (NC State and NC A&T) host highly effective statewide extension services for agriculture, engineering, and small/mid-sized businesses. Our North Carolina Area Health Education network with nine offices statewide is a primary resource for training of health professionals. UNC-TV serves the entire state through 12 public broadcast stations, and it has additional channel capabilities available for expansion. All of our institutions are strongly engaged in our communities – indeed, one of the five goals of the University's Strategic Plan, entitled "Higher Expectations," focuses on the *Economic Impact and Community Engagement* role of our institutions.

To support the University's role, we host an Economic Transformation Council through our System office. This Council includes a senior representative from each of our 17 institutions. It meets quarterly (or more frequently as needed) to exchange information and ideas related to campus- and System-level initiatives related to community engagement and to economic development projects. Members of this Council, for instance, regularly collaborate with state and local economic development entities to support the recruitment of business projects to North Carolina. They have also collaborated to design new initiatives to address challenges such as job losses as a result of a recession.

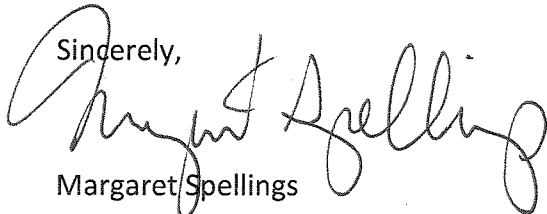
With respect to the Amazon HQ 2 project I believe that the University can be helpful and supportive in a number of specific ways, including:

- 1) My office, through our External Affairs Division, can serve as a focal point through which to access System- and campus-based leadership, expertise, and resources that may be most appropriate to support your efforts to recruit Amazon. Our Senior Vice President for External Affairs, Kevin Howell and our Interim Vice President for International, Community and Economic Engagement, Scott Daugherty, are available to you to support your efforts.
- 2) We can provide further detail with respect to current data on total annual graduates by discipline and institution and similar data on sponsored research activities. (see attached 2016 Degrees conferred in Business, Engineering, Information Science and Related Categories).

- 3) We can support your proposal by committing resource support for new curriculum development in support of the Amazon project.
- 4) Through the Economic Transformation Council, we can help you engage with specific campuses within the University to help you better understand the educational programs and research capabilities at those campuses that may be most relevant to your recruitment effort.
- 5) We can co-develop Internship and Apprenticeship opportunities with Amazon.
- 6) We can co-host job fairs with Amazon.
- 7) We can help you leverage community and business resource partners who may be helpful to you in support of the Amazon project.

Chris, we are available to assist you in anyway as you seek to attract Amazon to North Carolina. Please let me know how we can be most helpful to you and your team.

Sincerely,

A handwritten signature in black ink, appearing to read "Margaret Spellings". The signature is fluid and cursive, with the first name "Margaret" written in a larger, more prominent script than the last name "Spellings".

Margaret Spellings
President

cc: Tony Copeland, Secretary, North Carolina Department of Commerce
Roy Cooper, Governor of North Carolina
Kevin Howell, Senior Vice President External Affairs
Scott Daugherty, Interim Vice President for International, Community & Economic Engagement



NORTH CAROLINA COMMUNITY COLLEGE SYSTEM

*Ms. Jennifer Haygood
Acting President*

October 9, 2017

Ms. Ellen Tai
Economic Development Partnership of North Carolina
15000 Weston Parkway
Cary, NC 27513

Dear Ellen,

I am excited to learn that Project HQ2 is considering locations within North Carolina to establish the company's second Corporate Headquarters operation. As I understand this project, the company plans to create 50,000 full-time positions within a four-phase process over a fifteen-year timeline. The average annual salary of all positions is estimated to be \$100,000, and the capital investment is estimated to exceed \$5 billion and will be executed over the four phases.

The North Carolina Community College System is comprised of 58 community colleges, serving in excess of 720,000 students annually. The System is the third largest in the Nation and has consistently been funded by North Carolina's General Assembly to support education and training since the late 1950's.

Our most recent annual data reflects 36,041 students registering in two-year programs that will support the positions Project HQ2 will need. This includes Accounting; Business Administration; Business Analytics; Computer Engineering, Programming and Technology; Financial Services; Human Resources Management; Information Systems and Security; Legal; Networking; Office Administration; Office Systems Technology; Paralegal; and Project Management.

In addition, our NC Community College System has a strong partnership with the NC University System. For our most recent annual data, we enrolled 36,041 students who plan to obtain a two-year associate degree and transfer to the University System to obtain a bachelor's degree.

I am confident that given our extensive experience partnering with thousands of companies, both domestic and international, along with our resources and flexibility, that no other state offers accessibility to high quality workforce development as does North Carolina. The North Carolina Community College System is known worldwide for the quality and specific focus of our Customized Training Program and other programs that support business development in North Carolina.

Training may include pre-employment training, where candidates experience a short-term realistic job preview, as well as extensive post-employment training that will be customized for Project HQ2. A training plan is developed as a joint effort between representatives from the company, the local community college and the North Carolina Community College System. We are prepared to discuss technical training and soft skills training with your client. We look forward to partnering with Project HQ2 to design and develop a customized plan to meet their specific workforce development requirements for a well-trained and productive workforce that is the equal of any in the world.

Although it is difficult to determine a dollar value of the training without knowing specific job skills and competencies, I estimate the value of our training support for Project HQ2 to range from \$1,800 to \$2,000 per full-time position created. This does not include fixed costs of existing personnel resources, previous investments in curriculum development, facilities, etc. I also need to mention that this commitment is contingent upon availability of funding, which is based on annual legislative appropriations. However, no other state has as long a period of consistent funding for customized training as has North Carolina.

During the past year, we have worked with over 330 new, expanding, and existing industry clients across North Carolina to design and deliver focused and effective training programs that met their respective needs. Each year well over 96 percent of our clients ranked us as very good or excellent for meeting their training expectations, providing effective service, and for the impact of our training programs on their companies' productivity and performance. This year promises to be even busier and we hope to be able to start planning and implementing some of these activities for Project HQ2.

We are confident our Customized Training Program and the North Carolina Community College System have the fiscal resources and the expertise to provide assistance in developing a comprehensive and genuinely effective customized training program tailored to company needs.

Please know we are committed to a continued partnership with the company and the possibility of future expansion. If you have questions or need clarification on any of this information please feel free to contact me at 919-218-7133, or email me at littlem@nccommunitycolleges.edu at your convenience.

Sincerely,

A handwritten signature in black ink that reads "Maureen Little". The signature is written in a cursive, flowing style.

Maureen Little
Vice President, Economic Development

MTL/jmf



NORTH CAROLINA DEPARTMENT OF MILITARY AND VETERANS AFFAIRS

Roy Cooper
GOVERNOR

Larry D. Hall
SECRETARY

October 2, 2017

North Carolina is the proud home of the 3rd largest military community in the United States. With over 100,000 active duty members, over 22,000 guardsmen, and over 775,000 veterans, we have a strong group of military families, many putting their skills and training to work in the private sector, with an anticipated 20,000 members transitioning out of the service each year.

I have been consistently impressed with Amazon's commitment to veterans and military spouses. From the great strides toward your 25,000 military hires pledge to your deep work with AWS apprentices, you have shown us how much you value the talent in our community. My office, our partners at NC4ME (North Carolina for Military Employment, our state's public-private partnership to support this work), and our bases are all ready and eager to partner with you in this important work.

That partnership could take many forms and we can explore the options together in greater detail. By way of example, here are some of our past experiences and ideas:

- 1. Transition Training:** We work with several technology companies to offer pre-transition training on our bases. At Fort Bragg, we have a pre-transition training center where we would welcome your participation and could offer you space. It would be a phenomenal contribution to our state to set up Amazon-specific or industry-collective training programs together in cybersecurity, IT, and customer support.
- 2. Recruitment:** The North Carolina Division of Workforce Solutions partners with companies hiring our transitioning service members, spouses and veterans, and the division will be thrilled to work with Amazon to do the same. These services range from advertising and events to sourcing and screening candidates. The division has helped our partner companies fill thousands of roles with highly trained veteran talent.
- 3. Remote Work Support:** We are impressed with your dedication to military spouses and your understanding of their need for portable jobs. To alleviate the barriers of access to reliable internet, dedicated work space, and isolation, we are interested in offering free co-working spaces in the cities and towns near bases so that spouses working in remote roles can build relationships with one another and focus on their jobs within a tech-enabled work space.

In partnership with Amazon, North Carolina is prepared to create new and innovative programs both to help Amazon recruit great talent and to help our military community leverage their skills in your company. My team in the Department of Military and Veterans Affairs will serve as the central military liaison for Amazon, coordinating support from all of our bases and partner organizations serving transitioning services members, spouses and veterans.

We look forward to working together to support military hiring at Amazon.



Secretary Larry Hall

Duke University
Durham
North Carolina 27708-0001

OFFICE OF THE PRESIDENT
BOX 90001

TELEPHONE (919) 684-2424
FACSIMILE (919) 684-3050

October 10, 2017

Mr. Jeffrey P. Bezos
Chief Executive Officer
Amazon.com, Inc.
410 Terry Ave., North
Seattle, WA 98109

Dear Mr. Bezos,

I write to strongly urge you to locate Amazon's second headquarters in the Research Triangle region of North Carolina. No other place can offer such an educated and diverse workforce, vibrant quality of life and innovative, collaborative business environment than here.

Almost 60 years ago, Duke University joined with other visionary educational, business and government leaders to help create The Research Triangle Park (RTP). Today, RTP has realized the bold and audacious vision that its founders laid out: to bring together world-class universities, inventive corporations, and forward-thinking government agencies to solve the world's most pressing problems. This vision of collaboration and action has become a model for public-private, cross-institutional innovation in the United States and around the world. Indeed, just ask Alexa to search for the phrase "we want to be the next RTP" and you will see how powerful this approach has become.

Today, Duke University ranks as one of the top research institutions in the country with over \$1 billion of R&D expenditures each year. No region has a greater concentration of externally funded research in the biomedical sciences and technology. Much of this R&D work is performed in collaboration with RTP businesses such as Bayer, Cisco Systems, IBM, and GlaxoSmithKline, as well as the global reach of the Research Triangle Institute and public agencies like the Environmental Protection Agency and the National Institute of Environmental Health Sciences.

Duke and our neighboring universities will actively work together with Amazon. From data analytics and autonomous vehicles, to materials sciences and e-health, to supply chain management and information security, there is no part of the future we are *not* studying in this region. We are an innovative, collaborative, ambitious community, and our higher education system is ready to help you recruit and train talent, conduct research, provide satellite prototyping innovation lab spaces on our campuses and, perhaps most important, sustain the highest quality of life that can only be found in a region dedicated to learning and discovery, with students, faculty and professionals from around the world and activities and programs on every continent.

This is just the beginning of the ways in which we are ready to partner with Amazon. We look forward to any additional ideas you might have, and hope to see you soon here in the Triangle.

Best regards,



Vincent E. Price

October 11, 2017

Amazon
Office of Economic Development
% Site Manager Golden
2121 7th Ave
Seattle, WA 98121

Dear Mr. Golden:

On behalf of North Carolina State University, I strongly support North Carolina as the location for Amazon's second corporate headquarters. NC State is the largest university in North Carolina, with more than 34,000 students in 10 colleges, representing all major academic fields and a national leader in STEM education.

As a land-grant university, NC State's impact is felt in all 100 counties through both our Cooperative Extension Service and Industry Expansion Solutions, which helps the state's small manufacturers boost efficiencies, creating an average economic benefit of \$149 million per year. NC State also educates more North Carolinians than any other university. Infusing our students with a Think and Do mindset, NC State produces workforce-ready graduates who have experience grappling with real-world problems and developing solutions. Times Higher Education ranked NC State as 16th in Top Universities in the U.S. for Graduate Employability.

As a tier-one research enterprise, NC State received \$407 million in extramural research awards. Research expenditures were \$489.9 million for fiscal year 2016. The Association of University Technology Managers ranked NC State in the top five for technology licensing among U.S. universities without medical schools.

NC State has generated more than 125 start-ups - 27 in the last two years - and these add more than \$1.2 billion to North Carolina's economy every year. In the past five years alone, there have been more than 1,000 invention disclosures, 600 commercialization agreements, 400 patents issued, and nearly 900 new patents filed. NC State has a tremendous economic impact, with \$6.5 billion in added state income, 1.5% of Gross State Product, and more than 90,000 new jobs.

NC State's interdisciplinary focus has resulted in the Supply Chain Resource Cooperative, Entrepreneurship Initiative and Nonwovens Institute, which combine academic scholarship with real-world experience to teach students, benefit partners and create innovation. The university actively fosters interdisciplinary partnerships through the Chancellor's Faculty Excellence Program. The program has hired 67 world-leading educators and researchers in 20 interdisciplinary clusters, including bioinformatics, geospatial analytics and personalized medicine.

NC State's Centennial Campus has become a national model of public/private partnerships creating an environment that fosters the collision of ideas and diverse experiences. The university continues to expand upon its strong investment in applied sciences and over two decades of public/private partnership experience to develop Centennial Campus into a 21st century university innovation district. In addition to more than 600 residents, 75 partners are housed on Centennial Campus, and these include industry leaders such as Eastman Chemical, LexisNexis, and ABB, among others. Collaborative research, innovation and technological development are made possible via 4.8 million square feet of institutional, office, lab, residential and mixed-use space.

Site Manager Golden
Amazon
Page 2

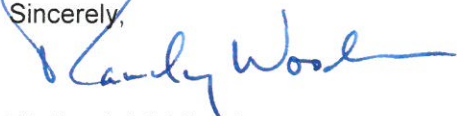
NC State is only one of two universities to host two NSF Engineering Research Centers, the FREEDM Systems Center, specializing in smart-grid technology, and the ASSIST Center, developing self-powered health monitors. The university is also an active partner in seven of the 14 Manufacturing USA institutes, which are networks of industry, government and academic partners to advance US manufacturing expertise, increase competitiveness, and promote robust and sustainable research and development infrastructure. In addition, NC State is leading a Smart Cities initiative, which includes Unmanned Aerial Systems.

Centennial campus is also home to the College of Engineering, the College of Textiles, the College of Veterinary Medicine and the Institute for Advanced Analytics, offering the nation's first Master of Science in Analytics that is uniquely designed to equip individuals for deriving and effectively communicating actionable insights from a vast quantity and variety of data. In addition, the Office of Technology Commercialization and New Ventures helps transfer discoveries from the lab to the marketplace, and the Technology Incubator facilitates unparalleled access to groundbreaking research.

Amazon would benefit greatly by locating its second headquarters in North Carolina. NC State offers a talent pipeline with highly competitive and career-ready graduates, world-leading researchers, and innumerable ways to partner and help Amazon achieve its strategic objectives.

Although NC State is already one of Amazon's strongest recruiting universities with nearly 500 alumni currently employed, we look forward to partnering with Amazon even more closely.

Sincerely,



W. Randolph Woodson
Chancellor

cc: Michael Haley, Executive Director, Wake County Economic Development, and
Senior Vice President, Greater Raleigh Chamber of Commerce
Adrienne Cole, President, Greater Raleigh Chamber of Commerce



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

CAROL L. FOLT
Chancellor

103 SOUTH BUILDING
200 EAST CAMERON AVENUE
CAMPUS BOX 9100
CHAPEL HILL, NC 27599-9100

T 919.962.1365
F 919.962.1647

October 11, 2017

Amazon Office of Economic Development
c/o Site Manager Golden
2121 7th Avenue
Seattle, Washington 98121

Dear Amazon:

As the leader of the University of North Carolina at Chapel Hill, America's first public university, I urge you to select North Carolina for a close look in the next phase of your site selection process. I believe there could be no better location for Amazon's second US headquarters.

UNC-Chapel Hill plays a major role shaping North Carolina's talented workforce, its vibrant quality of life, and, most importantly, the collaborative, creative and innovative business environment Amazon is seeking. North Carolina is the face of America's future workforce, and we welcome the opportunity to collaborate with you to identify, educate and train the diverse, bright talent you will need in your new location.

The University of North Carolina at Chapel Hill consistently ranks among the nation's top public universities, with over 18,000 undergraduates and 10,000 graduate and professional students taught and mentored by faculty dedicated to the advancement of humankind in all fields of endeavor. We compete for the most talented students and have developed programs that sustain student achievement and success in an increasingly diverse and fast paced world. The Chancellor's Science Scholars program, for example, is one of the nation's leading programs at targeting diversity in STEM and creating opportunities for our students, regardless of background, to pursue opportunities in these high-demand fields.

UNC-Chapel Hill is one of the most highly ranked research institutions in the country in racial, ethnic and socio-economic diversity and is the last public university in America to be both need-blind in its admissions and able to meet the

full financial needs of all students. We are home to the nationally recognized Carolina Covenant program, which ensures we have a student body from every economic and social strata and demonstrates our historic commitment to accessibility, affordability and student success. The New York Times ranked Carolina third nationally on their College Access Index of America's most economically diverse top colleges.

UNC's Kenan Flagler Business School, with its undergraduate and professional degrees and programs, is highly acclaimed nationally, as are our Schools of Law, Media & Journalism, and Information & Library Science. We also are home to strong programs in Computer Science, Entrepreneurship, Applied Math, Bioinformatics and the Humanities. UNC-Chapel Hill prides itself on producing well-rounded graduates with the creativity and problem-solving skills needed in today's rapidly evolving economy.

Carolina manages a robust, campus-wide program to develop entrepreneurial talent in all of our graduates. Our InnovateCarolina program teaches and develops these skills not just in business majors, but in the students and faculty in our arts, sciences and humanities programs. To date, UNC has spun out more than 475 businesses that together generate more than \$10 billion in revenue annually.

As an institution, Carolina has particular depth of experience and talent in the fields of computer and data science and information technology. We have deep strength in the curation, management, storage and analysis of big data, which we leverage heavily to support our global leadership in biomedical and social sciences. We are currently working with Amazon on strategies to extract knowledge from diverse sets of data through our NSF-funded South Big Data Innovation Hub. UNC is home to the nation's second oldest Department of Computer Science, and software developed by our faculty and students as far back as the 1960's drives the world's modern computer graphics, 3-D imaging and virtual reality technology.

UNC-Chapel is the 11th largest research university in the country. We conduct nearly a billion dollars of sponsored research each year. Much of this is in areas of value to the core of Amazon's business, particularly in data science, computer science, statistics and operations. UNC works closely with industry partners in the Research Triangle Park region, including Cisco Systems, RTI International, IBM, GlaxoSmithKline, Bayer and others.

As Amazon evaluates future strategic directions for the company, it will find Carolina's global leadership in the health, medical, pharmaceutical and

bioinformatics sciences to be a valuable resource. UNC ranks as the nation's 8th top NIH-funded university, and UNC Health Care's hospitals and provider network serve a large and broad population of patients.

UNC-Chapel Hill's vibrant culture of learning, discovery and collaboration is special and unique to this region – and one we share with our partners Duke and N.C. State University, who anchor the Research Triangle Park with us. When you consider North Carolina, you should view our entire educational system as a single resource – a team committed to working together with you to fashion solutions to everything from technological challenges to critical workforce needs.

The leaders of the Research Triangle universities would welcome an opportunity to meet with you and your team personally to show you how UNC-Chapel Hill and North Carolina's higher education community can work together to serve you.

Sincerely,

A handwritten signature in black ink that reads "Carol L. Folt". The signature is written in a cursive style with a large initial "C" and "F".

Carol L. Folt

MEREDITH COLLEGE

October 9, 2017

Dear Members of the Amazon HQ2 Planning Team:

On behalf of Meredith College, one of the nation's largest and best-ranked colleges for women, I am pleased you are considering Raleigh/Research Triangle Park for the new Amazon HQ2. Our network of outstanding colleges and universities who graduate work-ready students is well-documented and a powerful attraction for businesses and industries around the world.

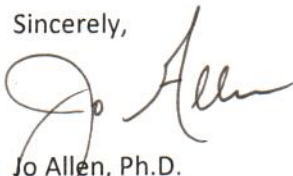
Meredith College itself is known for providing an exceptional education for women studying business, science, math, arts, humanities, and technology/engineering. Indeed, Meredith offers over 80 majors, minors, and certificate programs at the undergraduate, graduate, and post-baccalaureate levels. Upon degree completion, 95% are employed or in top-tier graduate programs within a few short months of graduation. Our alumnae become award-winning journalists, educators, entertainers, lawyers, doctors, and more. They lead non-profits, corporations, schools and colleges. They volunteer to make their communities stronger, and they are inspirational leaders on all fronts.

In addition to Meredith, a key feature of our region is the 50-year collaboration between top institutions through the Cooperating Raleigh Colleges, a consortium of the six historical institutions in Raleigh: Meredith, NC State, William Peace, Shaw, St. Augustine, and Wake Technical Community College. Our students benefit from taking courses at member institutions, and our faculty benefit from collaborative research and other forms of intellectual and social engagement. Together, we contribute to the economic, artistic, scientific, sociological, political, historical, and entrepreneurial vibrancy of our region. We spiritedly pursue cutting edge research, teaching, and engagement that promote superior learning and application of knowledge.

You will find here far more than a strong pool of work-ready, college-educated thinkers. You will find professionals who demonstrate a solid work ethic, a drive for success, and a commitment to the health and well-being of our communities. Part of that strength is that our students and graduates understand the power of cooperation, even amid competition. The ability to set priorities that will enhance our region is evidenced by numerous recent national "best" rankings, coupled with the large percentage of students who graduate and remain in the area. Their opportunities to go elsewhere are numerous, but they see the quality of life in Raleigh/RTP as a significant feature of why they pursued an exceptional college experience here—an experience that inspires them to live their best lives and give back to others.

I would love to host you at Meredith to show off our beautiful campus and have you meet our extraordinary faculty and staff and students. I can say without a doubt, having lived several other places, that this area offers the finest accumulation of quality people, work, and promise. I hope you will join us.

Sincerely,



Jo Allen, Ph.D.
President of Meredith College

PRESIDENT OF THE COLLEGE

3800 Hillsborough Street, Raleigh, North Carolina 27607-5298 | TEL (919) 760-8511 | FAX (919) 760-2838
jallen@meredith.edu



SHAW
UNIVERSITY
—1865—

Office of the President
Dr. Paulette Dillard
Interim President

October 9, 2017

Mr. Michael Haley
Executive Director, Wake County Economic Development
Senior Vice President, Greater Raleigh Chamber of Commerce
800 S Salisbury Street
Raleigh, NC 27601

Dear Michael,

On behalf of Shaw University, I would like to express our institutional commitment to Wake County Economic Development and the Greater Raleigh Chamber of Commerce in partnership and support of your proposal to bring Amazon HQ2 to the Research Triangle. Shaw University is a private, coeducational, four-year, Historically Black College/University (HBCU). Founded in 1865, it is the oldest historically black university in the South. Shaw University has been educating scholars for 152 years, and has a robust legacy of preparing scholars to be global leaders. We have always been committed to the transformative educational process and providing opportunities for academic success, while continuing to grow as an institutional leader in the Raleigh community and globally. This proposal is in direct alignment with our mutual goal of ensuring thriving economic development in the Research Triangle Region.

Shaw's location bridges Raleigh's downtown commercial district (home to global tech giants like Red Hat, Cisco, and Citrix) and Raleigh's southeast section, a central location for Raleigh's African-American community. With that, one of our key focus areas has been working to become more intentional in our strategic partnerships and collective impact approach, particularly in the areas of innovation and entrepreneurial advancement. Our location in downtown Raleigh provides for the extension of the boundaries of our campus to include access to a wide range of goods and services at the same time providing a skilled and diverse workforce to help fuel the economic growth of the Research Triangle.

The Research Triangle region is an incubator for collaboration and cultivation of business and community partnerships. Being in this region has allowed for technology optimization opportunities such as the relocation of our Durham CAPE (Center for Alternative Programs in Education) degree program at the Google for Entrepreneurs Tech Hub, American Underground campus in the American Tobacco Historic District. Having access to these types of partnerships supports our strategic vision of being a model for how business, technology, and education can marry to create innovative solutions to the world's most pressing issues, and is distinctive to this area.

The Research Triangle's entrepreneurship ecosystem and community is flourishing, and Shaw is proud to be a leader on that front. In that, we are enthusiastically excited to support Wake County Economic Development and the Greater Raleigh Chamber of Commerce in your efforts to bring Amazon HQ2 to our area to strengthen the heart of North Carolina at large, and the Research Triangle region.

Sincerely,

Paulette R. Dillard, Ph.D.
President (Interim)



Dear Amazon HQ2 Site Location Executives,

For more than 30 years I presided as a federal judge in Raleigh, and for nearly five years now I have had the good fortune to serve as the dean of Campbell Law School. Now more than ever, the people that weave the fabric of the Triangle are working diligently to improve our community as we take care of each other.

At Campbell Law we strive to lead with purpose, and our location in the heart of downtown Raleigh provides us the opportunity to do just that. We offer four clinics by which our students and licensed practicing attorneys assist area residents with legal issues which they have no means to tackle on their own. Our students organize and carry out countless pro bono projects throughout the year, intent on making a difference and using the practice of law as a calling to serve others. Our faculty members are routinely sought out to comment on and provide clarity to the most pressing and challenging legal issues of the day.

The opportunity for our students to gain practical experience while championing others in our own backyard has proven extremely beneficial for all involved. Bloomberg Business named Campbell Law the most underrated law school in America, and we regularly rank at or near the top of numerous lists annually with regard to bar passage success, advocacy, practical training, and best value.

I speak for the entire Campbell Law community --- students, faculty, staff, and alums --- when I say that we are beyond excited at the possibility of having Amazon's HQ2 located in the Triangle. We have many brilliant legal minds that are ready, willing, and able to work alongside you. Because we are a part of a private institution, we are extremely nimble and entrepreneurial in responding to and creating new opportunities. In recent years we have partnered with Citrix, ShareFile, and Sony Digital Paper to serve as a laboratory for their legal software products.

Campbell Law School, much like the Triangle, has enjoyed substantial growth in recent years. By bringing HQ2 to the Triangle, Amazon presents the entire region with another truly transformational opportunity. It is our sincere hope that you will consider all the area has to offer and join us as we continue to lead with purpose.

Respectfully,

J. Rich Leonard
Dean



WILLIAM PEACE
UNIVERSITY
Your Success. Our Mission.

William Peace University
Office of the President
15 East Peace Street, Raleigh, NC 27604
P: 919.508.2220 • F: 919.508.2327 • www.peace.edu

October 11, 2017

To the Amazon HQ2 Site Selection Leadership,

It is with passion and pride that I write to you to express our genuine excitement about the prospect of Amazon joining the Triangle community. As a relative newcomer to the area, I thought it would be helpful to offer my perspective on why I chose the opportunity to lead William Peace University in downtown Raleigh— because I believe it runs completely parallel to why I believe you should consider the Triangle Region for HQ2 – it is found in one concept – great potential.

The region is filled with potential – and is realizing its potential with each day. I have been struck by the level of talent, creativity, innovation and diversity here – in my mind – the four key pillars of a successful community. William Peace University is working hard to realize its potential more and more everyday through partnerships and collaboration and would embrace the chance to do so with Amazon.

William Peace University is an independent institution founded in 1857 and now serves a student body of approximately 1,000 students (both traditional undergraduates as well as adult undergraduates). We were recently named a top 50 Best Place to Work in the Triangle and have just launched our new strategic plan focused on Immersive Learning, Innovative Partnerships, Strategic Growth and Distinctive Identity. We have a liberal education core that is wrapped by more than 27 majors.

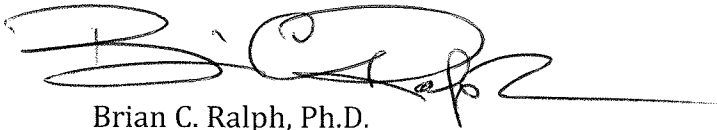
One item that may be of particular interest to you is that we require every traditional undergraduate student to complete at least one internship in order to graduate. That translates to us partnering with hundreds of organizations to create learning experiences for our students and value to our partners. We take seriously our partnership with organizations from around the region and they have benefitted tremendously from our commitment to excellence. An incredible 93% of our host organizations would hire our students if an opportunity was available, and many of our interns actually receive an offer for an available opportunity at their host organization.

We are an agile institution and would welcome the chance to enrich the lives of your employees as well as send you talented graduates who could contribute to your organizational success. We have created bachelor degree programs that serve the region and will continue to look for ways to do so going forward. A few great examples are our *Simulation and Game Design* and *Biology* Majors – two very different programs that fit well with the region's focus on technology and health sciences. We also have a wonderful Theatre and Musical Theatre program that provides entertainment and culture to the Raleigh community and beyond.

Lastly, I think it is critically important for you to know that there is a deep sense of collaboration here in the higher education community. Currently, I serve as Chair of the Cooperating Raleigh Colleges (CRC). This organization is comprised of the six major institutions in Raleigh and is a vehicle to facilitate collaboration and enhancement of student and employee experiences. Students are able to register for classes at member institutions as no additional cost, they have access to libraries at all institutions, and we are currently exploring shared international travel for students. We also facilitate professional development for staff across institutional lines. The CRC is a microcosm of what you will find here in Raleigh and the Triangle – a focus on collaboration to bring about the highest level of success.

If I can be of any assistance during your process, please do not hesitate to contact me. As I am sure you can appreciate, I believe the Triangle is a #primelocation for Amazon.

Warm regards,

A handwritten signature in black ink, appearing to read 'B. C. Ralph', with a long horizontal flourish extending to the right.

Brian C. Ralph, Ph.D.
President



October 11, 2017

Mr. Michael Haley
Executive Director, Wake County Economic Development
Senior Vice President, Greater Raleigh Chamber of Commerce
800 South Salisbury Street
Raleigh, NC 27602-2978

Dear Mr. Haley:

Wake Technical Community College enthusiastically supports regional efforts to bring Amazon to Wake County. I speak for our Board of Trustees, executive leadership, and 2200+ employees in saying that we are truly excited about this possibility and the opportunities it would create, both locally and throughout the state. Wake Tech has a proven record of successfully partnering with business and industry to create and sustain a qualified workforce, and we can provide the education, training, and credentialing a global corporation requires.

Wake Tech is the largest of the 58 institutions in North Carolina's Community College System, serving more than 72,000 students each year. The college includes five campuses (with a sixth opening next year), three training centers, and extensive online programs. Wake Tech is fully accredited and offers more than 200 degree, diploma, and certificate programs that prepare students for career employment or transfer to four-year institutions.

Our acclaimed Corporate and Business Solutions division includes our highly-sought-after customized corporate training program, which plays a key role in regional economic development. We provide training for businesses of all sizes, designing modules and hands-on experiences to meet each company's unique requirements. Company-specific training programs have included leadership and team skills, project management, software testing, Java development, server administration, ITIL® practices, CompTIA, SQL, Microsoft SharePoint, Agile leadership, and SCRUM mastery. Our services can include assessment, instructional design, and customized instructional materials. We can react quickly to the needs of businesses and respect the confidential nature of proprietary processes and information.

Wake Tech has always worked closely with local business and industry as well as with local and regional economic development organizations. Company representatives serve on our program advisory boards and our Board of Trustees. We invite industry to assist in the design of our curricula, to keep training programs relevant and ensure that our graduates have the skills companies need.

The examples that follow demonstrate the range of customized services Wake Tech has provided for major corporations. Please let me know if I can provide additional information.

Cordially,

A handwritten signature in black ink that reads "D. Gayle Greene". The signature is written in a cursive, flowing style.

D. Gayle Greene, EdD
Executive Vice President

Examples of Corporations Served by Wake Tech Customized Training

1. Multinational Virtualization/Remote Access Software Solutions Provider

This company's software delivers applications as on-demand services to any user, in any location, on any device. To capitalize on the growing demand for cloud-based services, their product enables secure transfer of documents through a software-as-a-service format. The State of NC awarded this company more than \$387K of incentive customized training dollars for job growth commitment in Wake County. Wake Tech provided training that included:

- Crucial Accountability
- Crucial Conversations
- DiSC Assessment
- Finance for Everyone
- Influencer
- Influencing Skills Workshop
- Insights Workshop
- Presentation Advantage
- Self-Care and Work-Life Alignment
- Strategic Decision Making
- The 5 Choices Achieving Extraordinary Results
- The Essentials of Project Management
- Microsoft Excel Advanced
- Microsoft PowerPivot
- Microsoft PowerPoint Advanced

2. Global Data, Technology, and Market Intelligence Solutions Provider

This company serves capital markets and corporate professionals around the world. It is a leader in offering platforms that facilitate the issuance of equity and debt securities and investment tools to the world's leading investment banks, financial firms, and publicly traded companies. The State of NC awarded this company more than \$400K of incentive customized training dollars for job growth commitment in Wake County. Wake Tech provided training that included:

Company-specific Training

- GMI Analyst Training
- DBD Data Collection
- RST Account Management
- Manager Series

Technology and Leadership

- Capital Market Financial Training
- Project Management & Communication
- SCRUM Mastery
- SCRUM Product Ownership
- Agile Leadership
- Writing Policies and Procedures
- Training Techniques (Train-the-Trainer)
- Negotiation Skills
- The 5 Choices to Extraordinary Productivity
- Disc Assessment
- Facilitation Skills

- High Impact Feedback
- Emotional Intelligence
- Investment Banking 101
- Securities 101
- Time, Budget, Risk
- Communicating With Impact
- Leading Virtually
- Presentation Skills
- Coaching for Development
- Taking Charge of Change
- Business Writing

Microsoft Training

- Excel
- PowerPoint
- Project

3. Global Consulting/IT Services Provider

This company has leveraged decades of global consulting and IT services expertise to create lasting relationships with a diverse group of Fortune 1000 customers across the aerospace and automotive, energy and utilities, financial services, government, hi-tech and manufacturing, life sciences and healthcare, media and entertainment, retail and cpg, and telecommunication industries. Based on

customer insights, the company established Services+ portfolios that span several vertical industries, including IT transformation, operations transformation, and technology transformation. The State of NC awarded this company more than \$200K of incentive customized training dollars for job growth commitment in Wake County. Wake Tech provided training that included:

Technology Training

- Introduction to Information Technology
- CompTIA IT Fundamentals
- MTA: Windows OS Fundamentals
- ITIL® Awareness
- Working with Windows
- MTA: Networking Fundamentals
- MTA: Server Administration Fundamental

Microsoft Training

- Excel
- Outlook
- SharePoint

Customer Service Training

4. Mutual Fund /Financial Services Provider

This company is the largest mutual fund company in the United States and one of the world’s largest providers of financial services. They provide investment management, retirement planning, discount brokerage, and human resources and benefits outsourcing services to more than 22 million customers worldwide. The State of NC awarded this company three customized training projects totaling more than \$4.7M over six years for their job growth commitment in Wake County. Wake Tech provided training that included:

Technology and Leadership

- WebSphere V6
- Project Management
- Developing J2EE
- Web Using RaD V7
- Series 6,23,7,24,26 Prep Course
- Fesco Computer
- Applied Test Technology
- Software Testing
- Comprehensive Spring3
- Flex 3: Rich Client
- SQL
- Facilitating for Results
- Negotiation Skills
- Building Better Relationships
- Customer Service

- Collaborating for Success)
- Communicating With Impact
- Influencer
- Presentation Skills
- Change Management
- Building Trust
- Decision Making

Company-Specific Training

- New Hire Orientation
- Time Management
- Business Writing
- Lean Six Sigma

Microsoft Office Suite Training

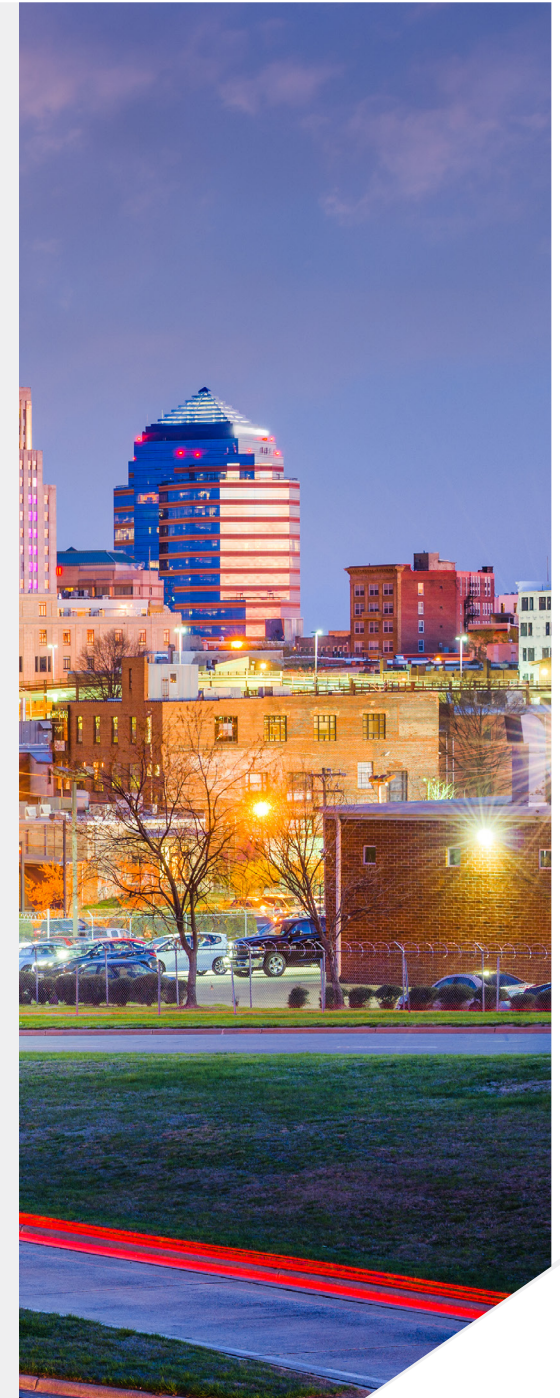


Looking to the Future

In a speech to Princeton University's graduating class in 2010, Jeff Bezos spoke of his work to solve a problem with new products or services that did not exist at that point in time, saying he took "a less safe path to follow my passion, and I'm proud of that choice."

While Amazon's HQ2 represents a transformational opportunity for our community, the growth of the Research Triangle means that change is already happening. Hopefully, by now you have an understanding of our region's strengths today, and our vision for the future.

We're excited for the possibility of Amazon being a part of that future.





Research Triangle Regional Partnership

8000 Weston Parkway, Suite 340 | Cary, NC 27513

www.triangledelivershq2.com