



Amazon iHQ3: Warsaw, Poland

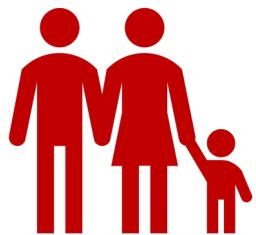
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Introduction

The Polish capital of Warsaw is vying to be the location for Amazon's next international headquarters



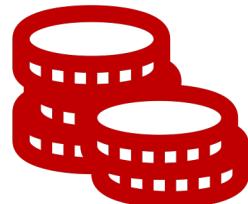
Advantageous Location



Quality of Life



Transportation

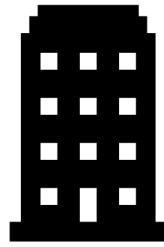


Business Climate



Incentives

Attractive to Large Businesses



>54 million
square feet of office
space



One of the cities with
the highest number of
skyscrapers in Europe



Warsaw Spire

2nd
Tallest
Building

Sustainability
&
Connectivity

- Private building
- Entire development covers 2,152,836 ft²
- Main tower is 220 meters
- Two auxiliary buildings are 55 meters
- Total value US \$500 million

- Green building certification
BREEAM
- Optimal fiber connectivity

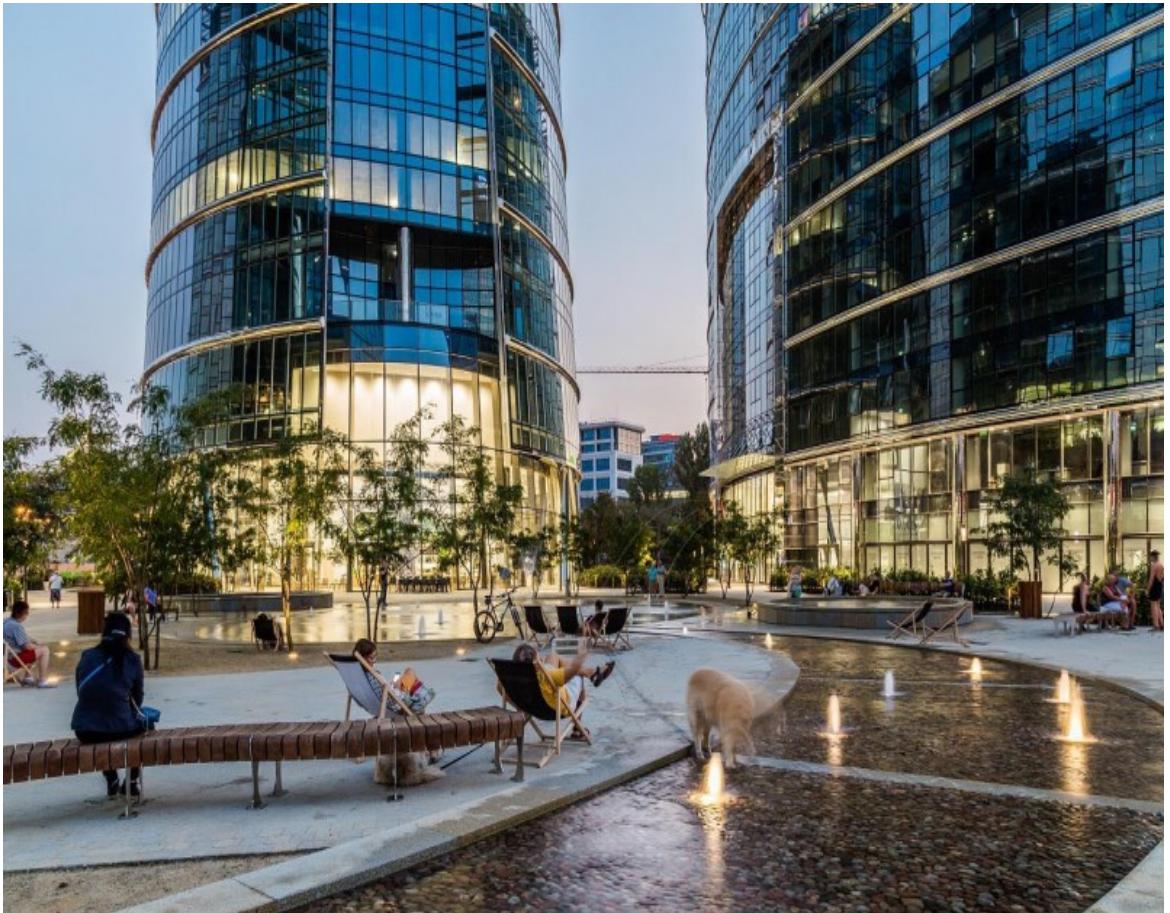


Nearby Amenities and Services

Examples:

- Shopping malls
- Museums
- Fitness centers
- Kindergartens
- Restaurants
- Coffee shops
- Clubs/pubs
- Theaters/cinemas

- Airport is an 11-minute car drive
- Subway station, tram and bus stops



Day-to-Day Life in Warsaw



Health Care

- Free public health care
- Free services for EU citizens



Safety

- Ranked 16th in the world for safest places to work



Employment

- Poland has a 3.6% unemployment rate
- Lower than the U.S, U.K, and Canada



General Education



Educated Adults

-
- 91% of adult population completed secondary school
 - Compared to the OECD average of 75%



Public Education

-
- Free and mandatory public education for ages 7-18
 - 66% of all high school graduates have English proficiency



Mathematical Skills

-
- Ranked 12th in mathematic skills in schools
 - Cognitive skills for teens exceed OECD average



University Presence



Elite Universities

-
- Out of top 300 emerging universities in Europe and Central Asia, Poland has 22
 - University of Warsaw



Affordable Education

- Free public higher education for Polish students
- International students pay \$2,300-4,530 US per month



Low-Cost Housing

- Residence halls range from \$110-160 US per month
- Shared rented flats cost from \$270-430 US per month



Historic Tourist Attractions



Old Town Warsaw

- Rebuilt after WWII
- Redesigned from 17th century art



Palace of Culture & Science

- Gift from Soviet dictator Joseph Stalin
- Tallest building in Poland



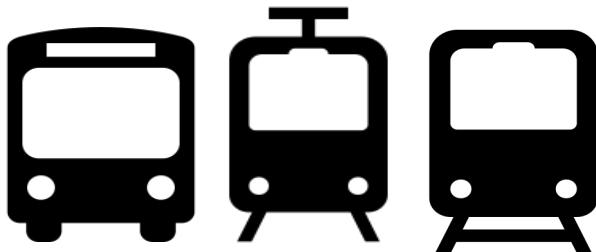
Auschwitz

- Infamous Nazi concentration camp during WWII
- Site of remembrance



Convenient Transportation

City Transit



>70%

customer satisfaction
since 2012

\$1.14

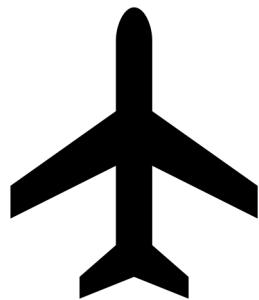
per ride

\$32

monthly pass

- English translations on tickets and many ticket machines

Warsaw Chopin International Airport



17 million+

passengers per year

22 min

from city center

- **Top Destinations:** Chicago, London, Paris, & Frankfurt
- **One-stop flights:** Seattle, San Francisco, & Washington D.C.
- **Direct flights:** New York & Chicago



Access to Employment Pools



110,000+

Local Students

- Local train serves 110,000+ students of business administration, IT, and technology in the city and surrounding provinces



German Cities

- Intercity rail to German cities, e.g. Berlin, Munich
- Elite schools: LMU Munich, Technical University of Munich, Humboldt University



French & English Cities

- Less than 3 hour flight from top French English cities, e.g. Paris & London
- Renowned schools and enormous populations



Progress-Focused Politics



Top Performer in

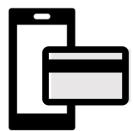
- Vision & Strategy
- Innovation
- Accessibility
- Sustainability



Bike-Share
Program



Emission-free
Trams



Replace paper
tickets with smart
technology



Expand current
transport lines,
pedestrian & bike-
friendly spaces



Warsaw Public Transport Council



Test integration
of self-driving
vehicles



Make 1/3 of bus
fleet electric by
2020



Capital and Operating Cost: Business Climate



Welcomes Foreigners

- Strong foreign investment in recent years
- Push for technology companies
- General affinity for US



Business Friendly Environment

- 19% Corporate tax rate-no double taxation
- Ample funding from EU
- Low government intervention

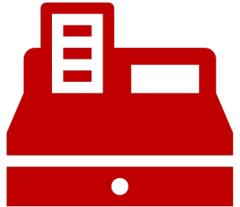


Advantageous Location

- Links Western and Eastern Europe
- Optimal shipping routes



Capital and Operating Cost: Possible Aid

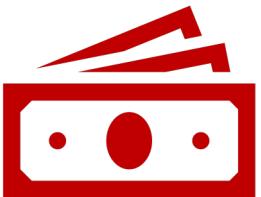


Tax Incentives

- Exemptions for salaries and wages
- Paid amortization for intangible assets



Amazon will enjoy reduced costs in a very lucrative business setting



Capital Outlay

- Subsidized raw materials
- Provided advisory for research and development



Incentives



Hotel Tax Incentives

- Amazon will receive 15% of any increase in hotel taxes



Leisure Pass

- 50% off all admission to entertainment events and historical locations

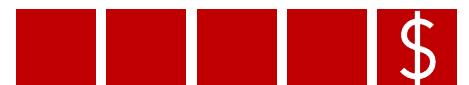
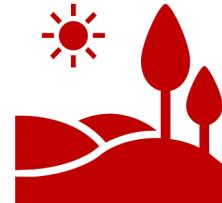
Work Permits

- Government involvement in acquiring work permits



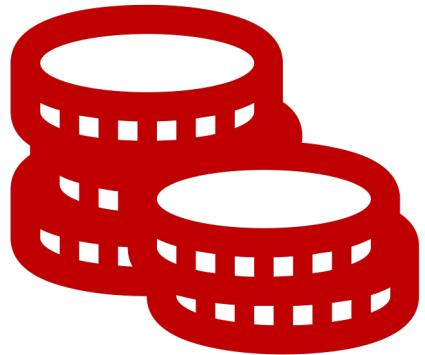
Override Land Regulations

- Expedite Amazon's ability to use Warsaw's land



Conclusion

By coming to Warsaw, Amazon can utilize the advantages offered by the Polish capitol just as Warsaw can benefit from Amazon's extensive influence



Economic Incentives



Social Capital



Mutually Beneficial

Questions? —

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