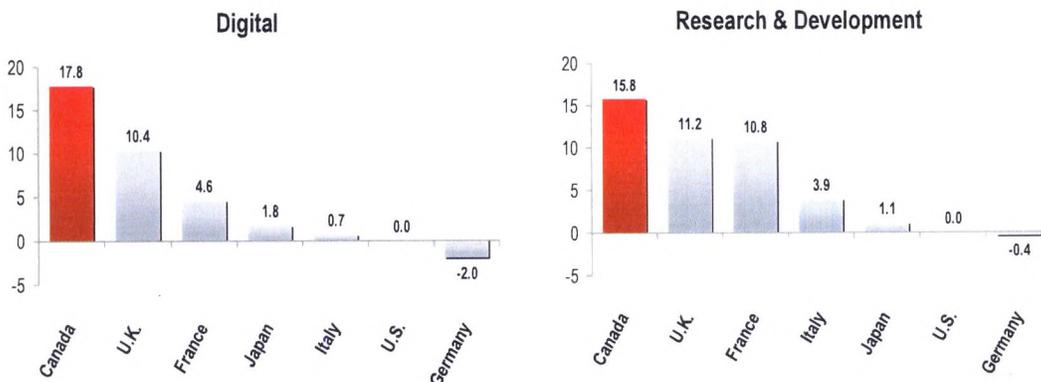




## ...especially in the Digital and Research & Development Sectors

- Canada is the lowest cost G-7 country in the Digital and Research & Development sectors.
- Of the 2 industries in the Digital sector, Canada is the lowest-cost G-7 country in both the Digital Entertainment and Software Design industries.
- Among the 3 industries comprising the Research & Development sector, Canada is the lowest-cost G-7 country in the Biotechnology and Product Testing industries and second lowest in the Clinical Trials industry.

### Percentage Cost Advantage (Disadvantage) Relative to the United States



Source: KPMG Competitive Alternatives 2014

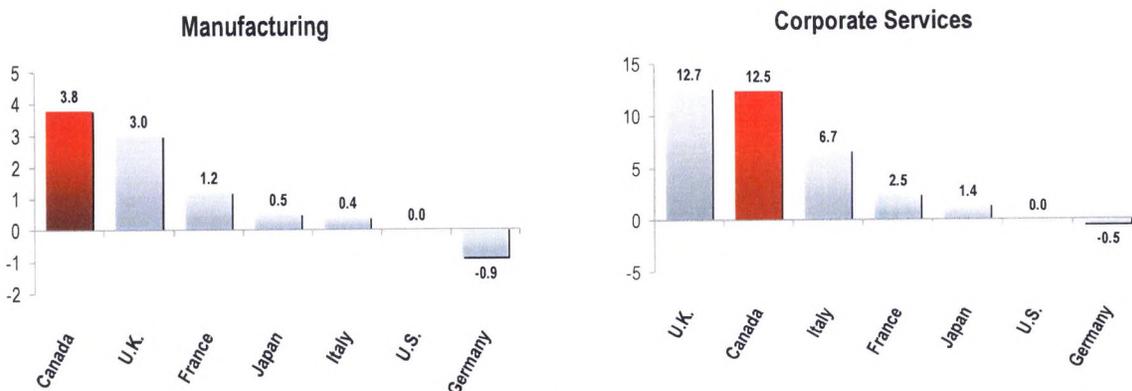
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## Canada is also highly cost-competitive among the G-7 in the Manufacturing and Corporate Services sectors

- Canada is the lowest-cost G-7 country in the Manufacturing sector and second lowest in the Corporate Services sector.
- Of the 12 industries within the Manufacturing sector, Canada is the lowest-cost G-7 country in the Aerospace, Automotive, Electronics, Green Energy, Medical Devices, Metal Components, Pharmaceuticals, Plastics and Telecommunications industries. Canada is the second lowest in the Agri-Food, Chemicals and Precision Manufacturing industries.
- Of the 2 industries in the Corporate Services sector, Canada is the lowest-cost G-7 country in the Professional Services industry.

### Percentage Cost Advantage (Disadvantage) Relative to the United States



Source: KPMG Competitive Alternatives 2014

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