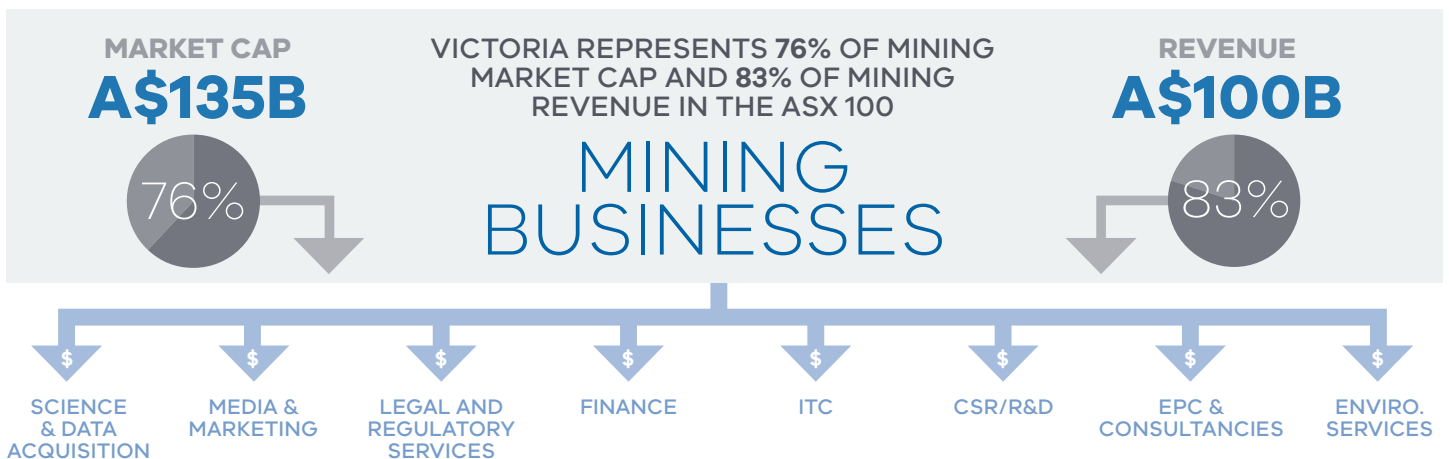


VICTORIA: A GLOBAL LEADER IN MINING AND MINING SERVICES

Victoria's capital, Melbourne is an internationally recognised hub for Australia's mining and resources industry. Victoria is home to an innovative and dynamic cluster of Mining Equipment, Technology and Services (METS) companies, making the state a world leader in the delivery of product and service solutions for the Australian and overseas resources sector.



VICTORIA'S LEADERSHIP IN THE MINING SECTOR

Melbourne serves as the headquarters for six of the largest 20 listed mining, metals, material, energy and utilities companies led by BHP Billiton, Rio Tinto and Newcrest Mining. These companies have annual revenue of over A\$67 billion (2016).

Victoria's mining and METS sector produces a variety of commodities, including brown coal (lignite), gold, mineral sands and base metals. Victoria is also a national hub for METS exports, with strong manufacturing and engineering capabilities operating in both metropolitan Melbourne and in regional hubs such as Geelong, Ballarat and Bendigo.

Melbourne is also a key financial and business centre and capital resources market in the Asia Pacific region that complements its competitive advantage in mining.

MINING EQUIPMENT, TECHNOLOGY AND SERVICES (METS)

Victoria is a global leader in the delivery of product and service solutions for the Australian and overseas resources sectors. Victoria's strengths in the METS sector are built on more than 150 years of mining heritage, a highly skilled workforce and Victoria's proven capabilities in:

- Mineral exploration;
- Mining products;
- Engineering consulting;
- Construction;
- Information and communication technology;
- Financial services; and
- Professional services including legal services and recruitment.

It is this comprehensive suite of capabilities that defines Melbourne as a global hub for the mining and mining services industry. Deloitte Access Economics estimates that in Victoria, the mining and METS sector directly contributed A\$8.2 billion in value added to the state economy in 2015-16 and supported approximately 88,000 full-time equivalent (FTE) jobs. The indirect economic contribution to Victoria is estimated to be A\$5.4 billion, supporting approximately 33,700 jobs in FTE terms.

The total direct and indirect contribution of A\$13.6 billion in value added represented 4 per cent of economic activity in Victoria in 2015-16. Victoria's METS companies are highly internationalised and export their products and services all over the world, including emerging economies in South America, Central Asia and the Middle East.

R&D INFRASTRUCTURE

Victoria's innovation ecosystem encompasses world class research and development infrastructure, including:

- The Commonwealth Scientific and Industrial Research Organisation (CSIRO) – Australia's national science agency;
- The Australian Synchrotron – the largest stand-alone piece of scientific infrastructure in the Southern Hemisphere, which has greatly contributed to the improvement of the alumina production process;

- A strong academic community including leading universities, the University of Melbourne and Monash University, which offers a dedicated Bachelor of Mining Engineering in partnership with Newcrest Mining and MMG to meet skills demands in the industry.

IMARC

Australia's mining and METS credentials, coupled with Melbourne's reputation for holding large scale events provides the perfect setting for the International Mining and Resources Conference (IMARC). IMARC is now a focal point for businesses in the Asia Pacific region and will present what this important sector has to offer.

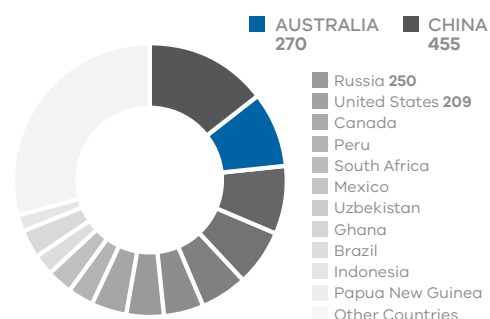
EST. ECONOMIC CONTRIBUTION OF MINING AND METS SECTOR IN VICTORIA, 2015-16

	Direct contribution	Indirect contribution	Total contribution
VALUE ADDED (\$M)	8,160	5,402	13,562
EMPLOYMENT (FTE)	88,027	33,675	121,702

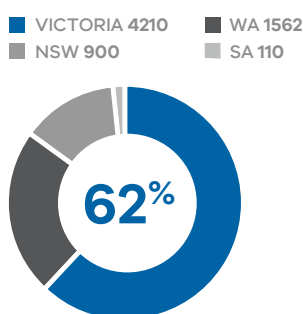
Source: Deloitte Access Economics (2017)

MELBOURNE BASED COMPANIES LEAD AUSTRALIA IN GOLD PRODUCTION

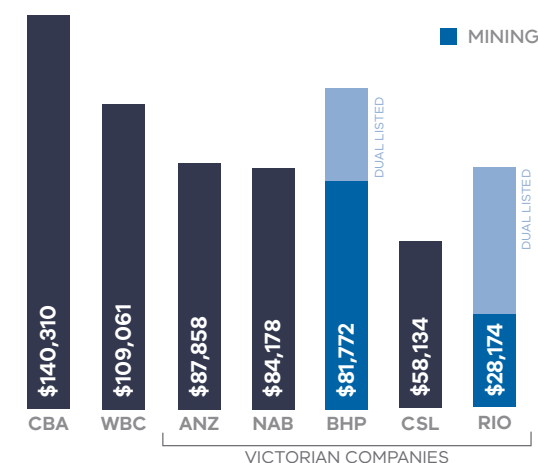
GOLD PRODUCTION (TONNES) 2016



('000 OZ) 2016



AUSTRALIAN ASX 100 COMPANIES BY MARKET CAPITALISATION (\$M)



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