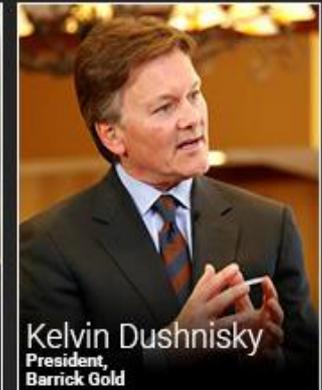
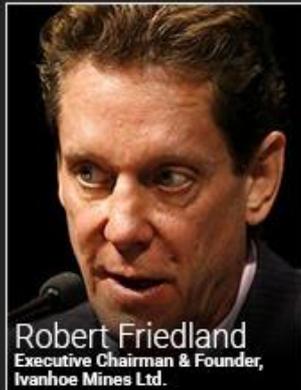


Why the World Admires Canadian Mining and Miners...and why that's good for suppliers!

Join the Giants of Mining in London
Canadian Mining Symposium

Organized by
Northern Miner & PDAC



Here's a question...

- What do the Botswana Chamber of Mines (BCM), the Finnish Mining Association (FinnMin) and the Argentinean Chamber of Mining Entrepreneurs (CAEM) have in common?
- A passion for Canadian ethos...and Canadian competency....

Here's the answer...

- They have all adopted Towards Sustainable Mining[®] (TSM) initiative, a corporate social responsibility program developed by the Mining Association of Canada (MAC) to improve environmental and social practices in the mining industry.
- This is first time that TSM has been adopted by a mining association in Africa and is the third to do so outside of Canada. FinnMin did in 2015 and CAEM in 2016.

To set some context...

- Mining industry globally slowly beginning to emerge from the doldrums.
- Saskatchewan is recognized as one of the world's top investment jurisdictions.
- *Suppliers have a key role in defining next-generation sector success on a variety of fronts – and in a variety of ways – for their customers and stakeholders.*
- *How you thinking about your business plans?*

By the global numbers...

- Canada ranks among Top Five countries globally...
 - First in potash
 - Second in uranium, nickel and niobium
 - Third in cobalt, aluminum and platinum
 - Fourth in salt, sulphur and tungsten
 - Fifth in diamonds, graphite and gold

Some Saskatchewan accolades

- Fraser Institute ranked jurisdictions around the globe using Investment Attractiveness Index
- Weighting: 60 per cent “geology”; 40 per cent “operating context”
 - Policy Perception Index
 - Up to 15 ‘non-mineral’ factors ranging from regulatory and policy contexts to “red tape” and labour markets.

So says the Fraser Institute...

Most attractive Canadian jurisdictions for mining investment

1. SASKATCHEWAN

2. MANITOBA

3. Quebec

4. Yukon

5. Newfoundland
& Labrador

6. Ontario



7. Northwest Territories

8. British Columbia

9. Nunavut

10. New Brunswick

11. Alberta

12. Nova Scotia

So says the Fraser Institute...

Top 10 most attractive jurisdictions for mining investment

1. SASKATCHEWAN

2. MANITOBA

3. Western Australia

4. Nevada

5. Finland

6. Quebec



7. Arizona

8. Sweden

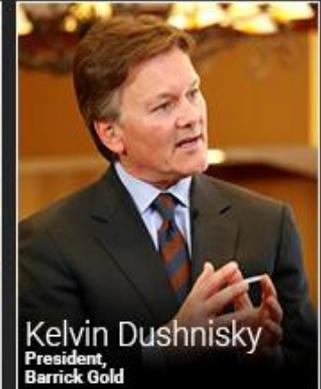
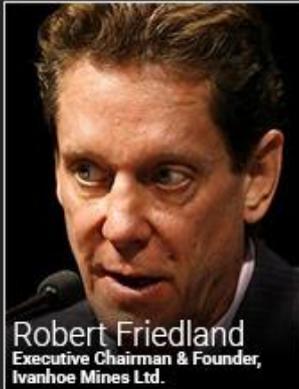
9. Republic of Ireland

10. Queensland
(Australia)

Some shameless promotion, but...

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By the SGI (Smart Guys Index)

- The things that make us world leaders in the mining universe...
 - As suppliers, are you thinking strategically about your customers and their challenges?
 - Are you incorporating the key attributes of the sector's needs into your bids and business development strategies?
 - Are you “scenario planning” for mining activity five and 10 years out?

An Innovation Machine...

- IBM's Watson goes to work “exploring” at Red Lake for Goldcorp.
 - Watson will ingest and analyze everything from drilling reports to geo-survey information to economically (and speedily) determine prime targets.
 - Decisions that are data-driven help drive value and mitigate environmental impacts by change in business practices, such as reduced drilling.

Creative juices that flow...

- Integra's Gold Rush Challenge for its Val-D'Or site:
 - Integra Gold purchased Lamaque in 2014 after its production life ended in 1985.
 - Acquired tonnes of data in the process and had a belief there was still gold to be found.
 - Launched a \$1-Million challenge for best solutions to be found by "mining" six terabytes of data.
 - Open to anyone in a global outreach...

Analysis/Policy perceptions

- World leader in transparent mineral/exploration policy.
 - [MAC/PDAC/Conference Board/Fraser Institute](#)
- Acts: Canadian Environmental Protection Act, Canadian Environmental Assessment Act, Fisheries Act, Navigable Waters Protection Act, Species at Risk Act/Migratory Birds Convention Act
- NRCAN's conference for energy/mines ministers

Organization & Community

- Canada is a gathering place for the global mining for information and best-practice exchange.
- PDAC
- MAC
- SIMSA
- CIMM
- AMEBC
- CAMESE

Education & Training

- Three of the world's top ten mining schools are in Canada...
 - McGill
 - Queen's
 - University of British Columbia
- EduMine & CareerMine
 - Canadian training with a global context
 - Partnerships with ASME and CIMM
 - Partnerships with global mining schools

Leading Research & Voices

- World-class research with industry partners:
 - Laurentian University
 - Mineral Deposit Research Unit (UBC)
- Leading trade and business voices with global audiences:
 - Northern Miner
 - Mining.com
 - Canadian Mining Journal
 - IntelligenceMine

Markets, Finance and Investment

- A fair, transparent and open investment environment for mineral exploration.
- Home to the TSX, world's leading exchange for mining companies.
 - 57 per cent of global mining companies listed on TSX and TSX-V.
 - In 2015, two exchanges accounted for 53 per cent of equity raised globally.
- Banks and brokerages highly skilled in the “high-risk, high-reward” aspects of mineral exploration.
- Global Canadian banks helps access to capital.

Regulation & Safety

- Canada regularly “exports” key tenets of its mining safety culture.
- Labor unions and industry associations are key shapers of best-practice policies.
 - Third-party verification processes key
- CIM’s John T. Ryan Award(s) for lowest reportable injury record.
- Atlas Copco: underground electric vehicle test effort in Canadian gold mines.

Recognizing Indigenous Peoples

- Canadian mining companies are globally recognized leaders for establishing productive relationships with First Nations and aboriginal communities.
- “Paix des Braves” in Quebec a good example of successful resolutions for all parties
- Mining sector is largest private-sector employer of aboriginals in Canada

An Ethos of Sustainability

- Mining Association of Canada's "Towards Sustainable Mining" is a world-leading initiative.
 - First globally to develop and externally verifiable system for sustainable mining practices.
- PDAC's sustainability toolkit, e3Plus, being expanded to account for human rights
- Corruption of Foreign Public Officials Act helps deter Canadian companies from bad international behaviours.