

Marlow Communications

INTELLIGENCE

. . . A NEWS AND INFORMATION BULLETIN

December 2007 - compliments of the season to all our clients, suppliers and supporters

While our job is to tell stories for other people, from time to time we have some stories of our own to tell and these will appear on an ad hoc basis in INTELLIGENCE.

- Our most important message in this edition of INTELLIGENCE, is to thank all our clients and associates for their tremendous support during 2007. It's been an extraordinary year and 2008 is already shaping up to be even busier and more exciting. To each of you – thank you, our very best wishes to you for the festive season, and we will repay your support as we work together in 2008.
- The ABS exploration stats are hot off the press for the September quarter, with SA's total for the quarter standing at \$87.2 million – another record. According to our sums exploration in the 12 months to the end of September totaled \$296.9 million. Remember that the original PACE target for 2007 was \$100 million . . .
- Although it's another record, the rate of increase of exploration is starting to plateau, and that's understandable and quite natural. As we've seen from Paul Heithersay's tenement maps, there's not a lot of 'new' land left for exploration, and drilling is now entering a more mature phase of the cycle.
- The most exciting aspect of 2008 will be the number of new mines going into production – our reckoning is 4-5. Again, pre-PACE there were only 4-5 mines in the State, so the move from an exploration boom to a mining boom is really gathering pace.
- If any other indicators were needed, there are widespread reports of residential property investors from WA buying local housing, undoubtedly mindful of Perth's housing boom of recent years.
- In our own business, we've been increasingly active in government relations since the last edition of InTelligence.
- We have arranged Ministerial briefings for two clients and are in the process or organising a third.

- We've prepared a client's submission to the Water Allocation Plan process being undertaken in the Western Mount Lofty Ranges; and prepared two submissions to PIRSA's Mining Act Review.
- Marlow Communications also made its own submission to the Mining Act Review and this will be posted on our new website, which is currently under construction and due to go live on January 1.
- We are increasingly involved in establishing and managing Community Consultative Committees on behalf of clients, with another one in the pipeline for early next year.
- And last but certainly not least, Marlow Communications has formed a strategic alliance with **Hughes Public Relations**. This complements our longstanding alliance with **Whitham Media Australia** and will provide Marlow Communications clients with an extended national coverage in areas including media, marketing, design, event management, publishing and publications as well as strengthening our existing capability in issues and crisis management. Marlow Communications will always retain its focus solely on the resources sector and we believe the alliances with Hughes and Whitham provide our clients in this rapidly growing industry with a total range of communication services.

All our intelligence from industry and government leads us to be bullish about the sector in 2008. Community engagement will be more important than in the past and we believe the regulator will increasingly be looking for evidence of community engagement plans in exploration and mining proposals.

Chris and I are keenly awaiting the arrival of our first grandchild in just a few days and will be off to Japan on New Year's Day to see him. (I'm allowed to take the laptop).

If you are taking a break, enjoy your time off and I look forward to working with you in the New Year.

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Serving Australia's Resources Industry

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