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DIVISION OF MINERALS

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**DEPARTMENT OF BUSINESS & INDUSTRY**

**DIVISION OF MINERALS**

**FOURTH ANNUAL  
EXPLORATION SURVEY**

**October, 1998**

by  
**Doug Driesner, Director of Mining Services**

Additional copies of this report are available from the Division offices in Carson City for \$3.00

## THE NEVADA DEPARTMENT OF BUSINESS AND INDUSTRY

### DIVISION OF MINERALS

The Nevada Division of Minerals, a part of the Department of Business and Industry, is responsible for administering programs and activities to promote, advance, and protect mining and the development and production of petroleum and geothermal resources in Nevada. The Division's mission is to conduct activities to further the responsible development and production of the State's mineral resources to benefit and promote the welfare of the people of Nevada. The seven member Commission on Mineral Resources is a public body appointed by the Governor and directs mineral-related policy for the Division and advises the Governor and Legislature on matters relating to mineral resources. The Division focuses its efforts on three main areas: industry relations and public affairs; regulation of oil, gas, and geothermal drilling activities and well operations; and abandoned mine lands.

The agency is involved in a wide array of activities relating to mineral development. Staff compiles annual data on all active mines in Nevada and maintains the State's mine registry. Information concerning mining operations and production is made available to the public through this yearly publication. Educational documents and materials concerning many aspects of the minerals industry are also produced. The Division participates in governmental activities affecting policies and laws concerning the minerals industry and resource development. The Division administers the State's reclamation bond pool.

The Division is responsible for permitting, inspecting, and monitoring all oil, gas, and geothermal drilling activities on both public and private lands in Nevada. Staff also monitors production of oil, gas, and geothermal resources to insure proper management and conservation. The Administrator is the Governor's official representative to the Interstate Oil and Gas Compact Commission.

The Division's abandoned mine lands program provides for public safety by identifying and ranking dangerous conditions at mines that are no longer operating, and by securing dangerous orphaned mine openings. The program continually urges the public to recognize and avoid hazardous abandoned mines.

Chas Horsey, Acting Director, Department of Business and Industry  
Fred Gibson, Jr., Chairman, Commission on Mineral Resources

Alan Coyner, Administrator, Division of Minerals  
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## SUMMARY OF NEVADA'S EXPLORATION ACTIVITY FOR 1997

The Division of Minerals has conducted its fourth annual exploration survey in an effort to determine the level of exploration activity in Nevada and to see what factors are influencing this activity level.

Responses were received from 51 companies. Thirty-seven, or 73 percent, focused their efforts mainly on gold, while 10, or 20 percent, sought a variety of metals. Four, or 8 percent, were seeking certain industrial minerals.

The main yardstick of exploration activity is the dollars spent. In 1997, the respondents reported spending \$138.8 million on Nevada projects, an \$18 million increase over 1996 levels. Projections for 1998, however, indicate a significant decline to \$94.1 million. By comparison, spending in the rest of the U.S. (non-Nevada) was \$87.6 million in 1997 and \$1.1 billion for the entire world. Nevada's share of domestic and worldwide exploration spending was 61 percent and 13 percent respectively, in 1997.

Another key measurement of exploration activity is the number of geologists employed. A total of 309 exploration geologists were reported to be on the payroll for Nevada projects in 1997. The previous survey had projected 273 geologists would be employed in 1997 so the actual level was higher than predicted.

The respondents reported holding 89,833 claims in Nevada in 1997. According to the Nevada State Office of the BLM, a total of 173,897 claims were held in Nevada as of October 1, 1997, thus the respondents to this survey held a little over half of all claims in Nevada. The respondents also reported holding 23,780 claims in other states, so over 79 percent of the respondent's claims are located in Nevada.

A composite of all respondent's ranking of factors influencing their activity is listed below in order of decreasing importance.

1. Existence of favorable geology
2. Commodity prices
3. Uncertainty of permitting time frames
4. Actual length of permitting time frames
5. Corporate demands
6. Uncertainty over mining law reform
7. Wilderness study areas
8. Announcements of new discoveries
9. Changes in foreign mining laws
10. Federal claim maintenance fees
11. Land exchanges
12. Mergers

The ranking of the various factors is similar to previous surveys, but not identical. Existence of favorable geology maintained its position as the most important factor while commodity prices moved up from number 5 in 1996 to number 2 in 1997.

Explorationists, particularly in Nevada, face the difficult challenge of replacing reserves lost to production. Only 28 percent of the respondents were able to replace all of their Nevada production with newly found Nevada reserves. The other 72 percent replaced portions of their reserves. More respondents replaced their reserves via expansions of existing operation than through grass-roots efforts.

The attitudes of all respondents toward domestic exploration were slightly more pessimistic than optimistic. Twenty-seven percent reported being optimistic, 42 percent pessimistic and 31 percent were neutral.

Mineral exploration is a small but clearly important part of Nevada's economy. Nevada has favorable geology, a skilled work force, and a good infrastructure, but Nevada does not have a monopoly of exploration targets. Nevada and the rest of the U.S. need to have a favorable political climate combined with reasonable laws and a good degree of certainty of the future to insure that mineral exploration, and the production that follows, will continue to be viable.

## **INTRODUCTION**

In early 1998, the Division of Minerals conducted its fourth annual survey of exploration companies conducting projects or holding claims in Nevada. Similar surveys were conducted by the Division in 1995, 1996 and 1997 with reports produced for each of those years. Like previous years, the purpose of the survey was to determine current and projected levels of exploration activity and to investigate what factors are influencing these levels.

One hundred and one questionnaires were sent out. Responses were received from 51 companies. The Division appreciates the efforts made by those who responded. The responses are considered a portion of the official mine registry allowing for confidentiality of individual company's information. Of the 51 respondents, 37, or 73 percent, are focused almost exclusively on gold. Ten, or 20 percent are seeking a variety of metals, including gold. Only four, or 8 percent, are seeking industrial minerals, particularly those with specialty applications.

In the 1995 survey, responses were received from 46 companies. Forty-nine were received for the 1996 report. Most, but not all, of the companies responding to the '97 survey were the same as those responding to previous surveys. While it is useful to compare trends, comparing figures from the previous surveys to the present one cannot be done on an exact basis.

## **EXPLORATION EXPENDITURES**

Exploration expenditure is regarded as one of two main indicators of exploration activity, the other being the number of geologists employed. Exploration expenditures reported for Nevada projects totaled \$138.8 million in 1997 which is an \$18 million increase over the \$120.9 million reported for 1996, and a \$14 million increase over what the previous survey had projected for 1997. Projections for 1998 spending, however, indicate a significant decline of 32 percent from 1997 to \$94.1 million. Respondents were asked to provide figures for planned 1999 activity, but very few were able to do so. This shows the importance of mineral exploration to Nevada's economy, but also shows that a great deal of volatility and uncertainty exists.

Spending in the rest of the U.S. (non-Nevada) was reported to be \$87.6 million in 1997, up significantly from the \$37.4 million reported for 1996, and from the \$57.9 million which had been projected to be spent in 1997. Respondents to this survey, however, projected a very sharp downturn for 1998 to only \$42.2 million. Nevada's share of domestic exploration spending was 61 percent in 1997, and is projected to increase to 69 percent in 1998. This increased share, however, actually represents a smaller slice of a rapidly shrinking pie.

Respondents reported their worldwide spending in 1997 reached \$1.082 billion. This represents a 18 percent increase over the \$914.1 million reported for 1996. As is the case with domestic exploration spending, respondents project a downturn for 1998, with only \$763.0 million expected to be spent. Very few respondents were able to provide 1999 estimates. Nevada's percentage of worldwide spending was 13 in 1997 and is projected to drop slightly to 12 in 1998. It should be pointed out that this survey is biased toward Nevada, as companies without any Nevada activity are not polled.

In previous surveys, a distinction existed between the companies with Nevada exploration budgets greater than or equal to (GE) \$1 million and those with budgets less than (LT) \$1 million. While there are still companies with large budgets and small budgets the gap between them has all but ceased to exist, being filled by companies with middle sized budgets. Graph 1 on page 8 shows the distribution of respondent's budgets. Of the 51 respondents, 26 were GE companies and 25 were LT. The GE companies accounted for 97 percent of Nevada's exploration spending in 1997. This is projected to drop slightly in 1998 to 95 percent, as the LT companies on average, report they plan to increase their spending. The GE companies account for the lion's share of domestic and global spending as well with 90 percent and 95 percent, respectively. The actual 1997 percentage and projected 1998 percentage are essentially the same. Graph 2 on page 9 shows the breakdown of exploration spending.

The average Nevada spending per respondent was \$2.7 million in 1997, up from \$2.5 million in 1996. The 1997 average for GE respondents was \$5.2 million while the LT respondents averaged \$142,000. Projections for 1998 show that the average spending per GE company will drop to \$3.4 million but the LT average will rise to \$191,000. The average spending for all respondents is projected to drop to \$1.8 million in 1998. Graph 3 on page 10 illustrates the average spending per respondent.

## **GEOLOGISTS**

The second main indicator of exploration activity is the number of geologists employed. Not surprisingly, the number of geologists employed closely follows the amount of expenditures. In this survey, the respondents provided information on geologists employed in Nevada, however not enough respondents provided employment figures for the rest of the U.S. or worldwide to make it possible to report meaningful numbers on Nevada's percentage of domestic or worldwide exploration geologist employment.

Respondents reported 309 exploration geologists on the payroll in Nevada in 1997 but there is a significant drop projected for 1998, when only 228 are anticipated to be employed. The previous survey had projected that 273 geologists would be employed in 1997, so the actual level was higher than predicted. Of the 309 employed

geologists, 271 were employed by the GE companies and 38 were employed by the LT companies. Graph 4 on page 11 illustrates the number of geologists employed and projected to be employed based on responses.

## **EXPENDITURES PER GEOLOGIST**

In Nevada, the GE companies spent considerably more per geologist than the LT companies did. In 1997 the GE companies averaged spending \$499,000 per geologist compared with \$93,000 for the LT companies. 1998 projections show the GE companies dropping to \$461,000 per geologist, but the LT companies project an increase to \$141,000. The statewide expenditures per geologist are heavily weighted by the GE companies, with \$449,000 spent per geologist in 1997 for all respondents. The 1998 average expenditure per geologist is projected to decrease slightly to \$413,000 in 1998.

## **MINING CLAIMS**

Respondents indicated they intend to hold more claims than were reported in the 1996 survey. According to the Nevada State Office of the Bureau of Land Management, as of October 31, 1997 the total number of claims held in Nevada, including those held by companies responding to this survey was 173,897. This number has increased slightly in recent years but is no where close to the approximate 400,000 held prior to the 1993 enactment of the annual federal claim rental fee.

Respondents held 89,833 claims in Nevada in 1997, up sharply from the 64,497 predicted by the 1996 survey. In 1997, respondents reported holding 23,780 claims in the rest of the U.S. Seventy-nine percent of the respondent's 1997 claims were located in Nevada and 21 percent outside of Nevada. Projections for 1998 show a slight drop in Nevada claims held by respondents to 83,753 and a larger drop in claims held in the rest of the U.S. to 13,254. In 1998 respondents are projected to hold 86 percent of their claims in Nevada.

The GE companies hold considerably more claims in Nevada than the LT companies. In 1997, the GE companies controlled 77,683 claims compared to 12,150 for LT companies. For 1998, the GE companies project holding 71,863 claims compared to 11,890 for the LT companies. For claims held in the rest of the U.S. the GE and LT companies are at nearly equal levels. In 1997 the GE companies held 13,839 claims compared to 9,941 for the LT companies. In 1998 the GE companies project holding 8,919 claims in the rest of the U.S. while the LT companies project 9,825. The GE companies, as a group, held 85 percent of their claims in Nevada in 1997 and project holding 89 percent of them in Nevada in 1998, whereas the LT companies currently hold and expect to hold 55 percent of their claims in Nevada.

Thus, the GE companies are focusing their land positions on Nevada more than the LT companies. Graph 5 on page 12 shows the claims held by respondents.

## **FACTORS INFLUENCING ACTIVITY**

As in previous surveys, this survey ranked the factors influencing a company's exploration activity. The composite of all respondent's ranking of factors is listed below in order of decreasing importance.

1. Existence of favorable geology
2. Commodity prices
3. Uncertainty of permitting time frames
4. Actual length of permitting time frames
5. Corporate demands
6. Uncertainty over mining law reform
7. Wilderness study areas
8. Announcements of new discoveries
9. Changes in foreign mining laws
10. Federal claim maintenance fees
11. Land exchanges
12. Mergers

The ranking of the various factors is similar to previous surveys, but not identical. Existence of favorable geology maintained its position as the most important factor. Commodity prices moved up in importance from number 5 in 1996 to number 2 in 1997. Uncertainty and actual length of permitting time frames are also important factors. Corporate demands is a new factor in the 1997 survey and ranked number 5 in importance. Uncertainty over mining law reform, wilderness study areas, announcements of new discoveries, changes in foreign mining laws and federal claim maintenance fees ranked essentially the same as in previous surveys. Land exchanges and mergers are new factors added to this survey. While they are important factors in certain situations, their importance was weighted lowest overall.

The GE respondents and LT respondents were generally similar in their ranking of the importance of factors, but not exactly. Graphs 6, 7, and 8 on pages 13,14, and 15 show the relative importance of factors influencing exploration activity for all respondents, GE respondents, and LT respondents respectively.

## **MINING LAW REFORM**

Uncertainty over mining law reform continues to heavily influence domestic exploration. Many respondents indicated that the longer the uncertainty goes on, the more pessimistic they become. While some bills have been introduced in Congress, no

action has been taken. As a result, the responses to this survey were essentially the same as last year.

This year's survey did not ask for a ranking of concerns over the various provisions being discussed in mining law reform, however respondents were asked to comment on patenting, royalties, determination of suitability and citizen's lawsuits, changes in claim boundaries, and "other."

Patenting was regarded by most respondents as a necessary way to obtain secure title to protect their investments. The ideas of patenting at fair market value and the reversion to public land after completion of mining were acceptable to practically all who supported patenting. Many respondents complained that the patenting process was too long and costly and that arbitrary holds on the process should be illegal. Several respondents thought patenting at fair market value was not an issue at all, but was being made an issue by those with "hidden agendas."

The idea of royalties was generally regarded as undesirable but probably inevitable. Any royalty based on gross production was regarded as a potential "death blow" for domestic exploration, being particularly hard on low grade properties. No respondent supported a royalty, but a few reported they could tolerate a small royalty based on net proceeds. Some respondents thought the federal government should leave royalties with the states. Many thought royalties would be an accounting burden and would require more bureaucracy to administer.

Determination of suitability and opportunities for citizen's lawsuits were described as bad, dangerous, absurd, frivolous, biggest issue of all, critical, discretionary, open season on mining, and other similar comments. It was generally thought that the existing permitting process offers plenty of opportunity for public comment.

The idea of changing mining claim boundaries and staking procedures was generally regarded as tolerable, but many asked "Why do it?" Some respondents thought simplification of mining claim procedures would be good, but cautioned that existing claims would need to be grandfathered and changes would likely cause confusion. In the event mining claim boundaries did change, many respondents favored larger claims based on legal subdivisions.

## **REPLACEMENT OF RESERVES**

Respondents were asked if they are replacing their production with newly found reserves. In this question a "Yes" response indicates total replacement of reserves lost to production for that respondent. The response from the smallest company carries the same weight as the largest company. Thus, the percentages reported refer to the

number of respondents replacing their reserves and not to the amount of reserves being replaced. In addition, a number of respondents are strictly in the exploration business and have no production of their own. Only the responses from companies having production were evaluated for this portion of the survey.

On a worldwide basis, 66 percent of respondents reported that they replaced their production with newly found reserves. The GE and LT companies had about equal success with 65 percent and 67 percent, respectively.

In the U.S., including Nevada, 60 percent of respondents replaced their production. Domestically, the GE companies fared slightly better than the LT companies with 67 percent and 56 percent, respectively.

In Nevada, with its high rate of production, replacement of reserves is a more difficult challenge. Overall only 28 percent of respondents were replacing their reserves. The GE companies reported more success with 42 percent replacing their reserves as opposed to only 15 percent for the LT companies. Graphs 9, 10, and 11 on page 16, 17, and 18 show the reserve replacement of respondents worldwide, domestically, and in Nevada respectively.

Reserve replacement, at least in terms of numbers of respondents being able to replace their worldwide production, has fallen from 81 percent in the 1995 survey to 72 percent in the 1996 survey to 66 percent in this survey. In Nevada the percentage of respondents replacing their reserves has vacillated from 48 percent in 1995 to 60 percent in 1996 to 28 percent in 1997.

More respondents replaced reserves via expansions of existing operations than through grass-roots efforts. Many respondents relied on both methods. 47 percent of respondents replaced reserves as a result of expansions compared with 25 percent grass-roots. 28 percent used both. The GE and LT companies had essentially the same percentage. Graph 12 on page 19 depicts the methods of reserve replacement.

## **ATTITUDES**

The attitudes of all respondents toward domestic exploration were slightly more pessimistic than optimistic. 27 percent reported being optimistic, 42 percent were pessimistic and 31 percent were neutral. The GE companies tended to be more optimistic (43 percent) than pessimistic (26 percent). 31 percent of the GE companies were neutral. The LT companies were much less optimistic (9 percent). 59 percent were pessimistic while 32 percent were neutral. Graph 13 on page 20 illustrates the attitudes of respondents.

## **CONCLUSION**

Nevada, with its favorable geology and history of mineral production, is regarded as a good place to explore. Nevada does not, however, hold a monopoly of exploration targets. Companies are becoming increasingly global in their quest to find new reserves. Nevada and the rest of the U.S. need to have a favorable political and financial climate combined with reasonable laws in order to insure that mineral exploration, and the production that follows, will continue to be viable.

Table 1. Worldwide exploration expenditures for responding companies for the years 1994 through 1997 and 1998 projected.

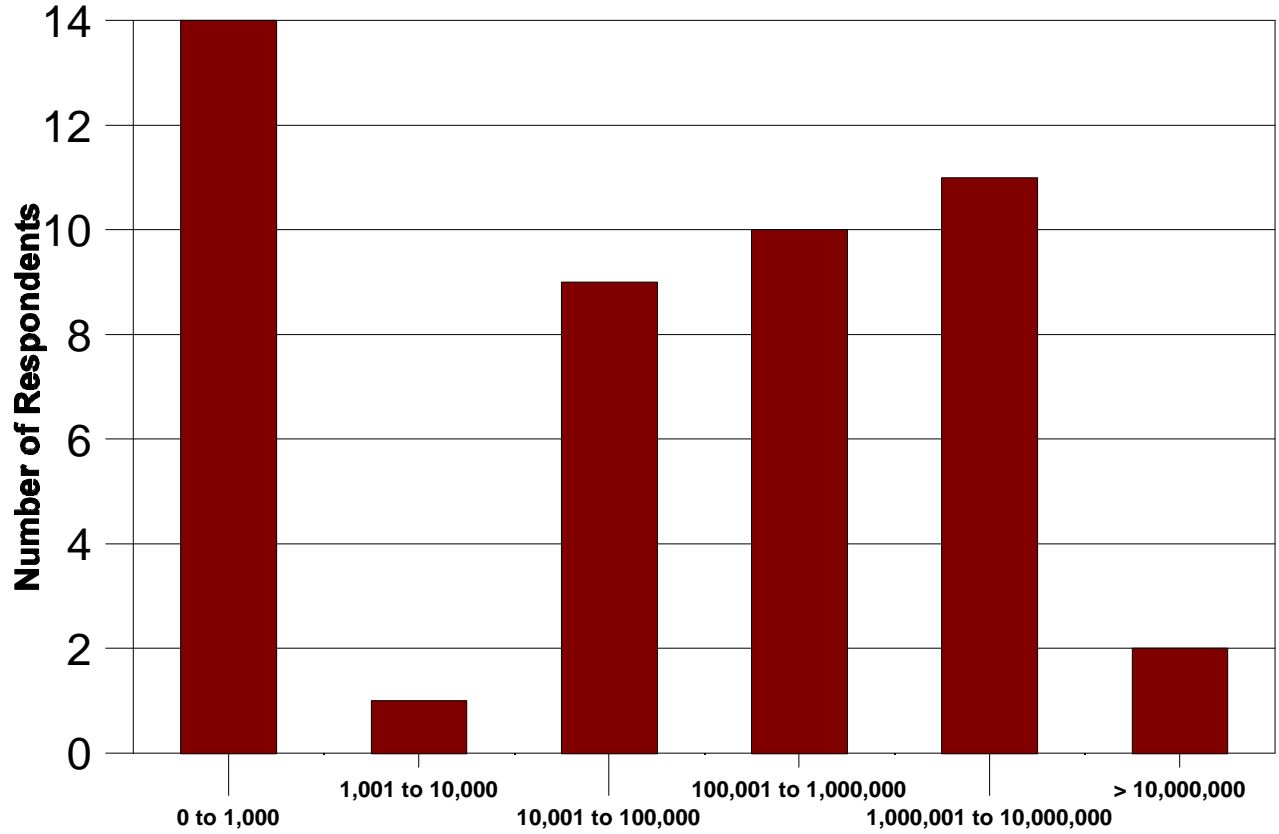
Year	\$ Nevada	\$U.S. (incl. NV)	\$World (incl U.S.& NV)
1994	\$154,000,000	\$206,000,000	\$458,000,000
1995	\$140,808,000	\$193,417,000	\$793,479,000
1996	\$120,904,000	\$158,876,000	\$914,081,000
1997	\$138,894,129	\$226,480,529	\$1,082,000,781
1998 proj	\$94,135,600	\$136,319,000	\$762,998,000

Table 2. Number of responding companies and average exploration expenditures in Nevada by LT companies and GE companies for the years 1994 through 1997 and 1998 projected. LT companies have exploration expenditures less than \$1 million and GE companies have exploration expenditures greater than or equal to \$1 million.

Year	No. of LT Companies	Average NV Expenditure	No. of GE Companies	Average NV Expenditure
1994	19	\$115,683	27	\$4,462,550
1995	23	\$124,260	24	\$5,747,900
1996	13	\$53,385	36	\$3,339,200
1997	25	\$141,924	26	\$5,205,617
1998 proj	25	\$191,000	26	\$3,400,000

GRAPH 1

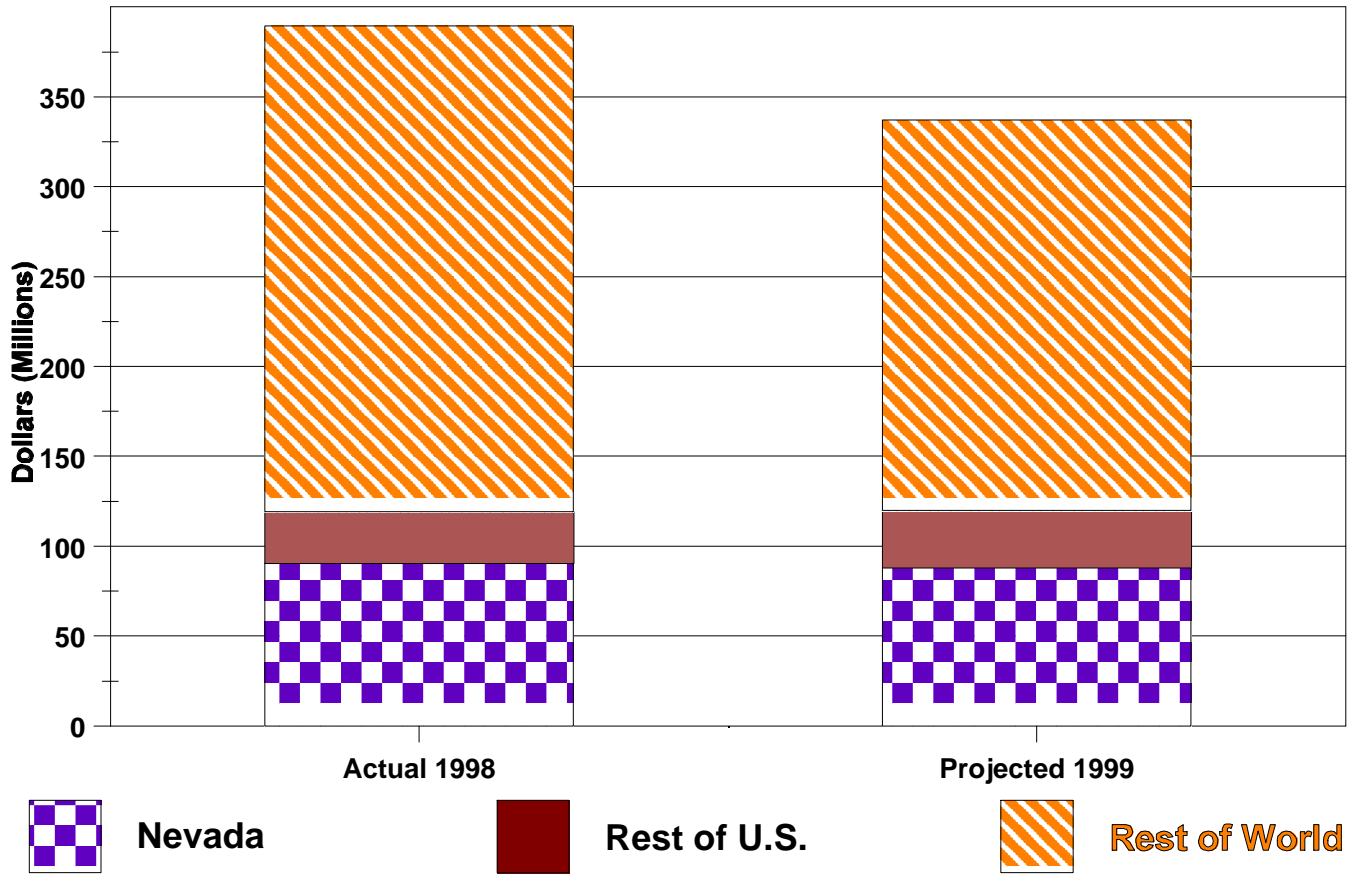
## Exploration Dollars Spent in Nevada in 1998



NDO/MLV98

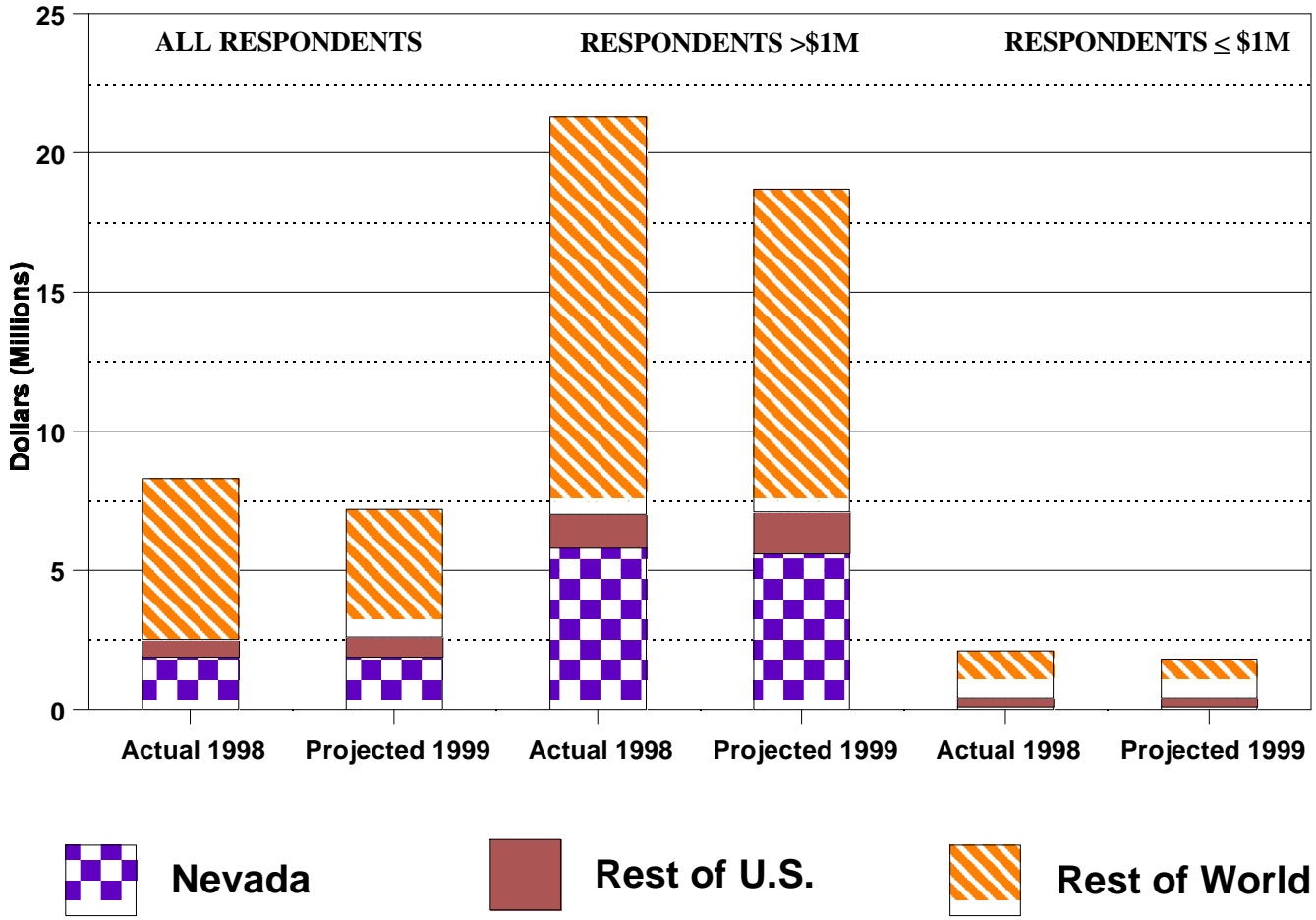
GRAPH 2

# Total Exploration Spending 1998



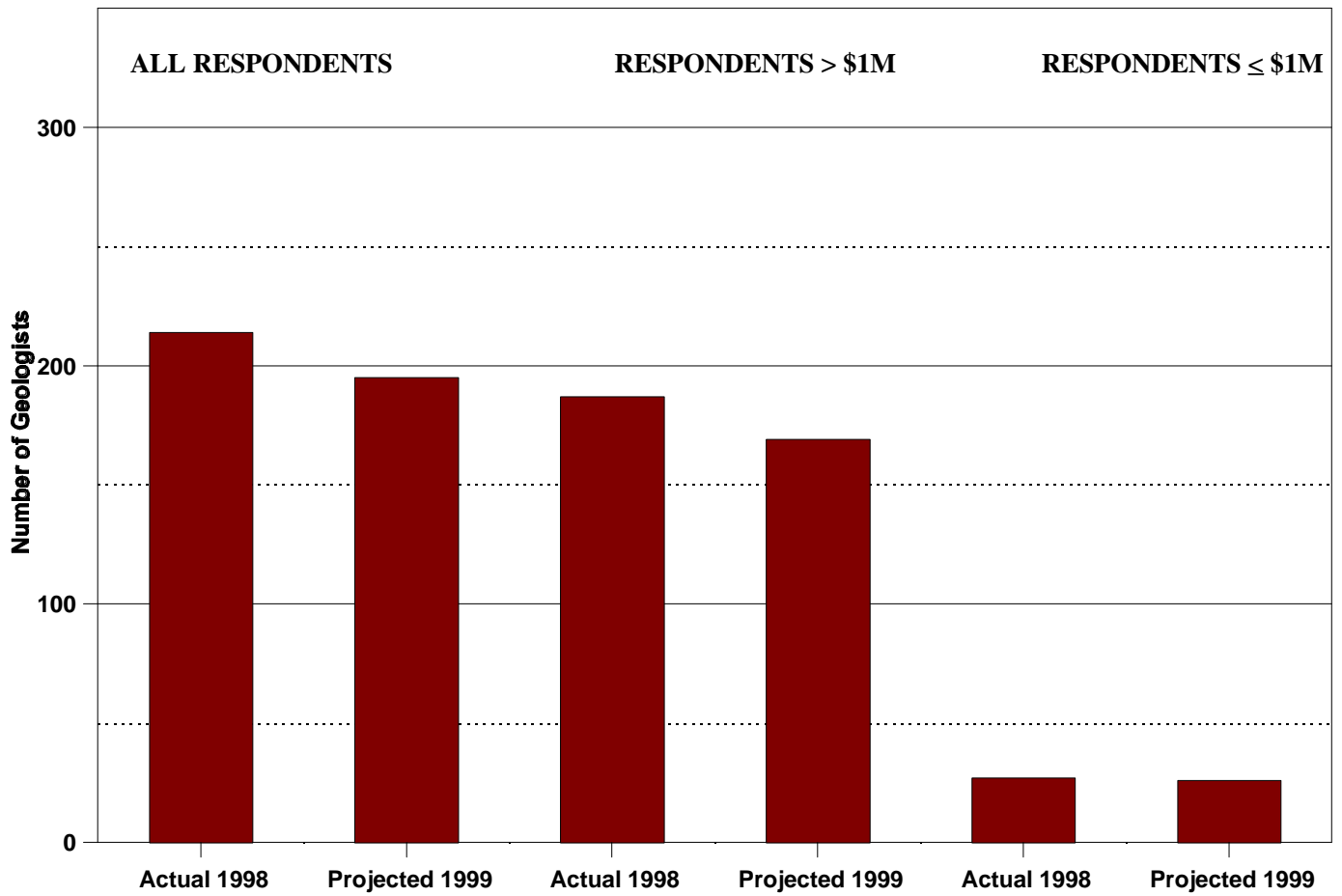
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GRAPH 3  
**AVERAGE SPENDING PER RESPONDENT 1998**



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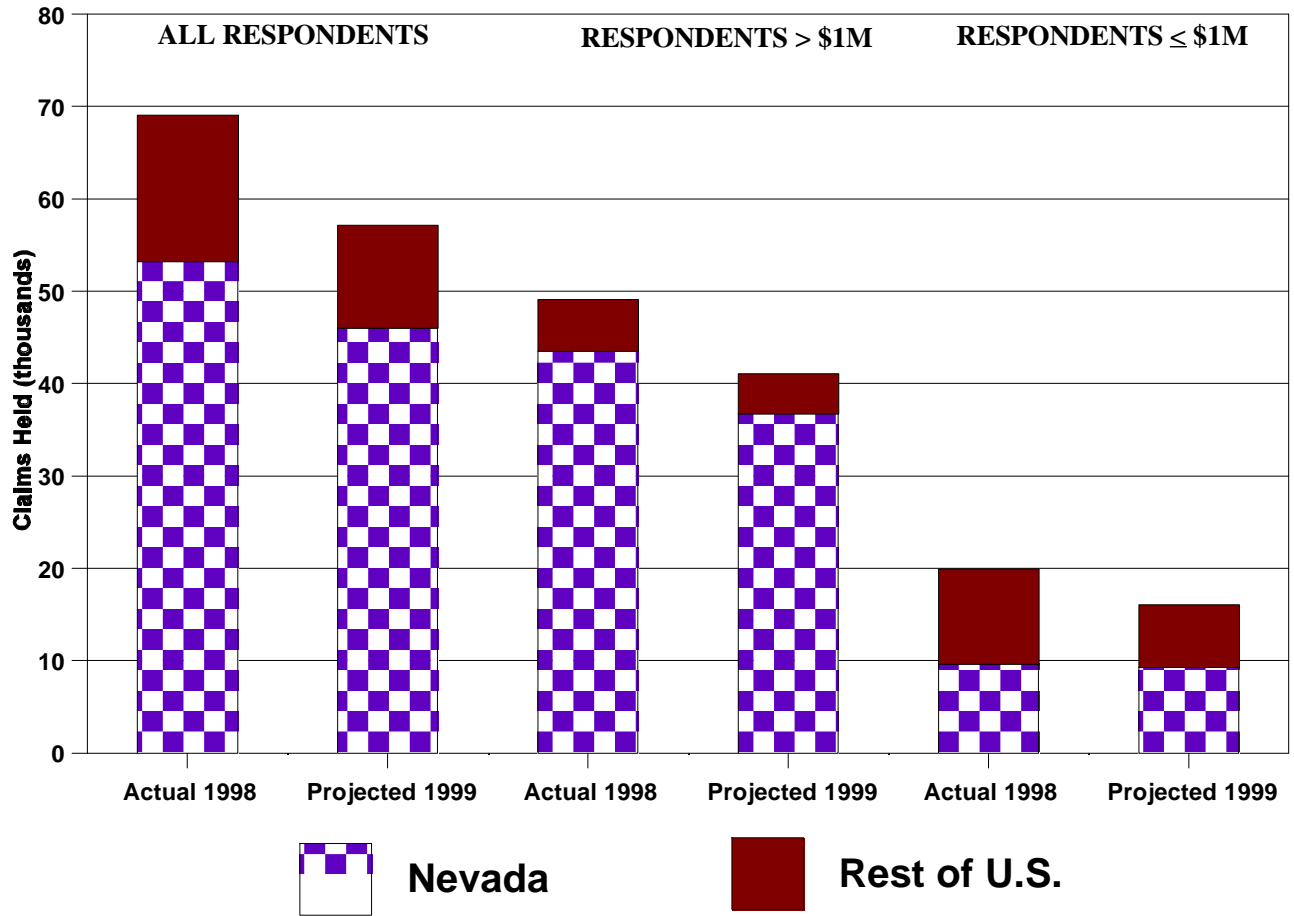
GRAPH 4  
**EXPLORATION GEOLOGISTS EMPLOYED IN NEVADA 1998**



NDOMLV99

GRAPH 5

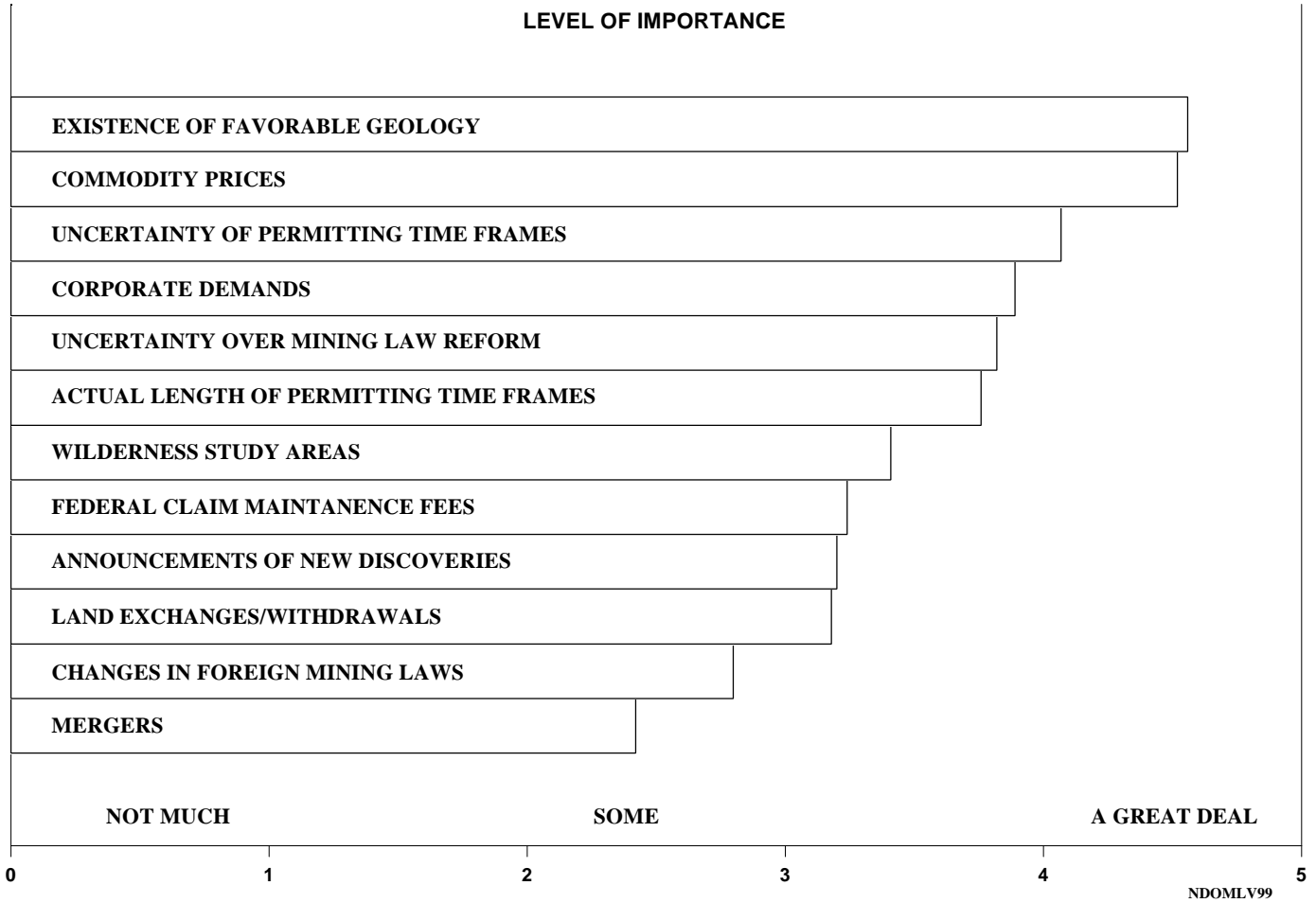
### NUMBER OF CLAIMS HELD 1998



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GRAPH 6  
**FACTORS INFLUENCING ACTIVITY 1998**

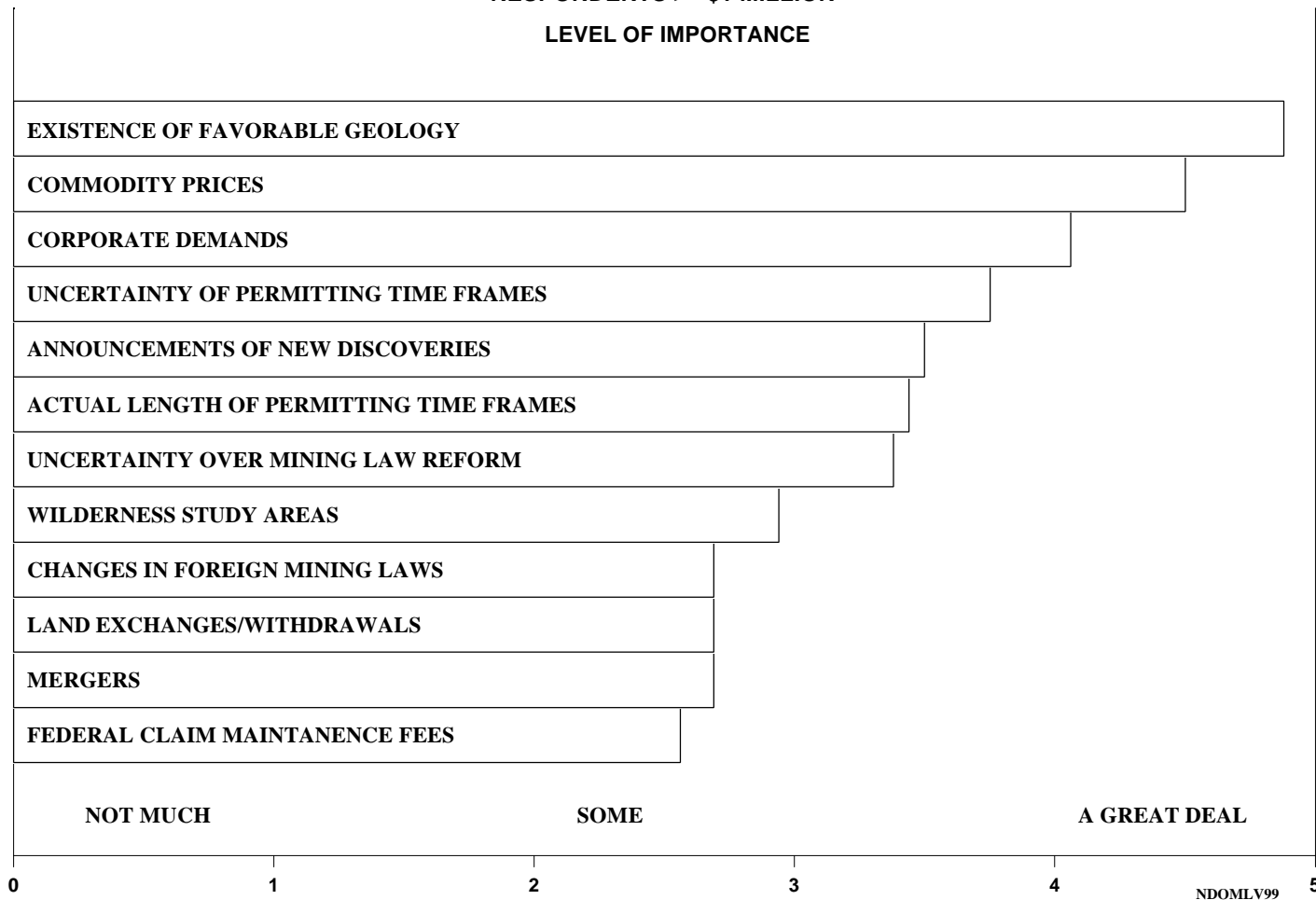
ALL RESPONDENTS  
 LEVEL OF IMPORTANCE



GRAPH 7  
**FACTORS INFLUENCING ACTIVITY 1998**

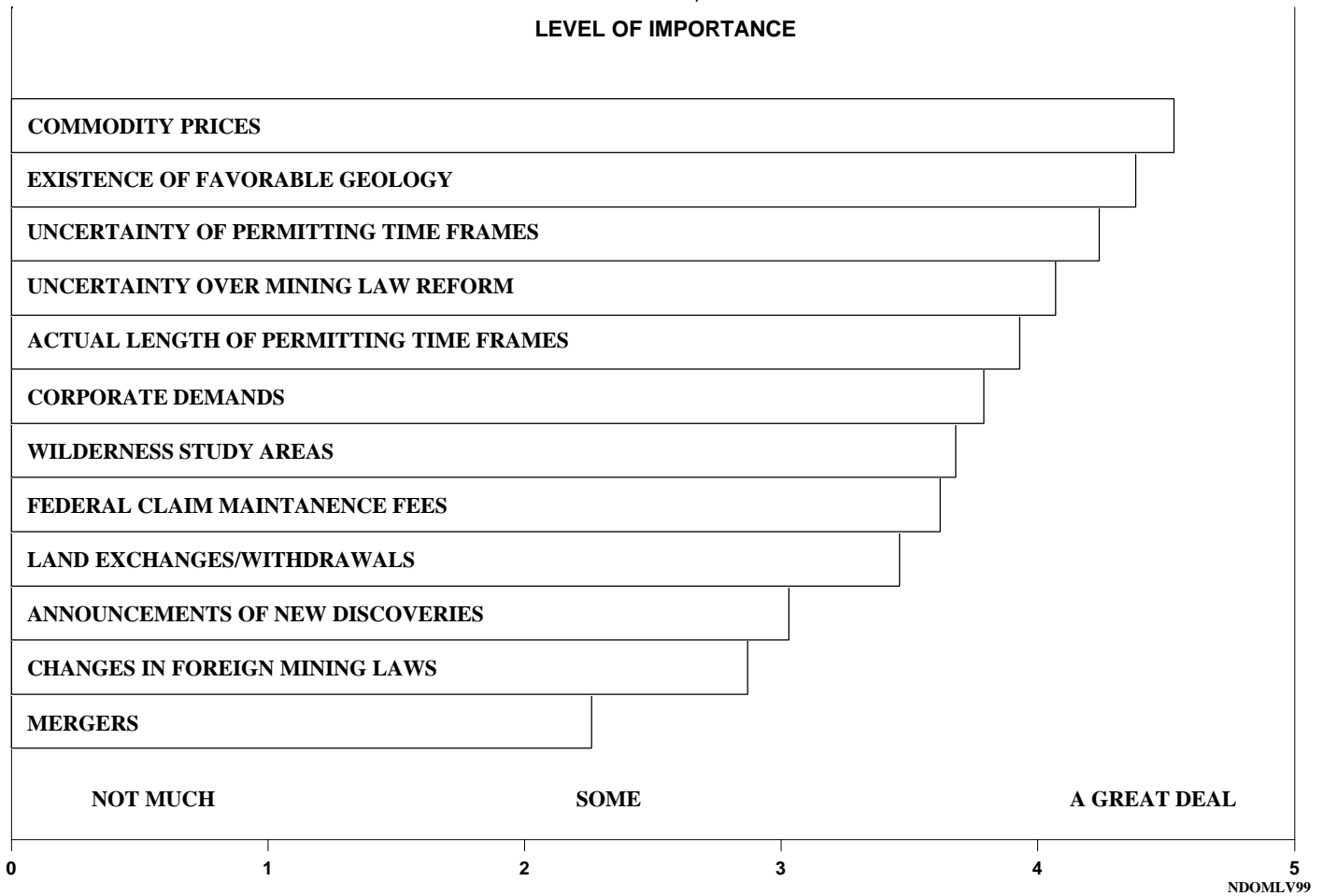
RESPONDENTS >= \$1 MILLION

LEVEL OF IMPORTANCE



GRAPH 8  
**FACTORS INFLUENCING ACTIVITY 1998**

RESPONDENTS < \$1 MILLION  
 LEVEL OF IMPORTANCE

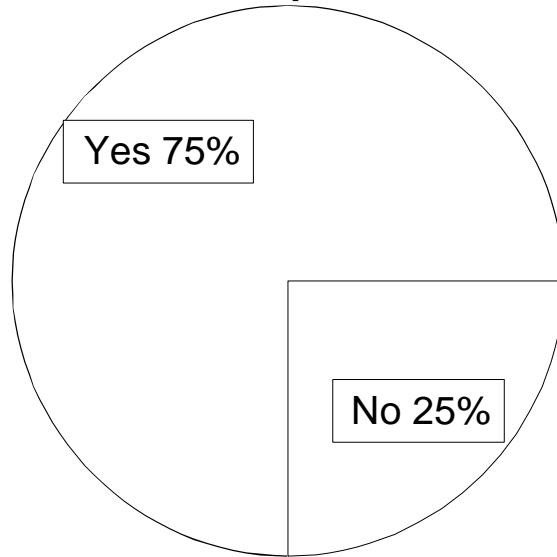


GRAPH 9

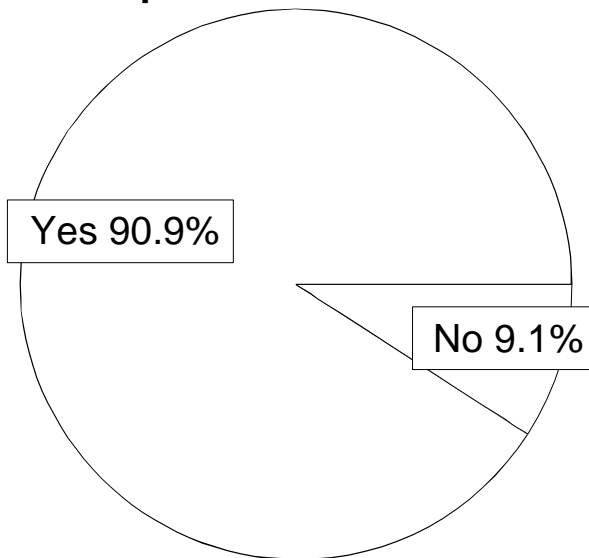
## WORLDWIDE RESERVE REPLACEMENT 1998

Are you replacing your overall production with new reserves?

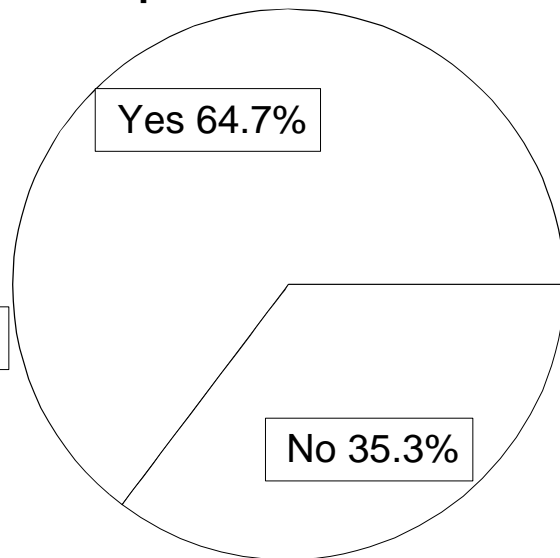
### All Respondents



### Respondents $\geq$ \$1 Million



### Respondents $<$ \$1 Million

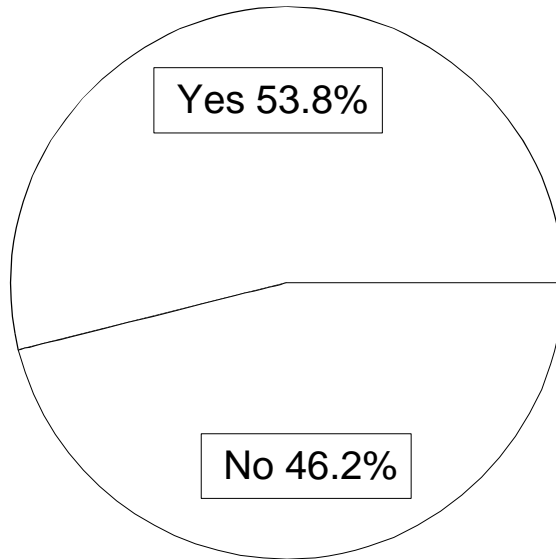


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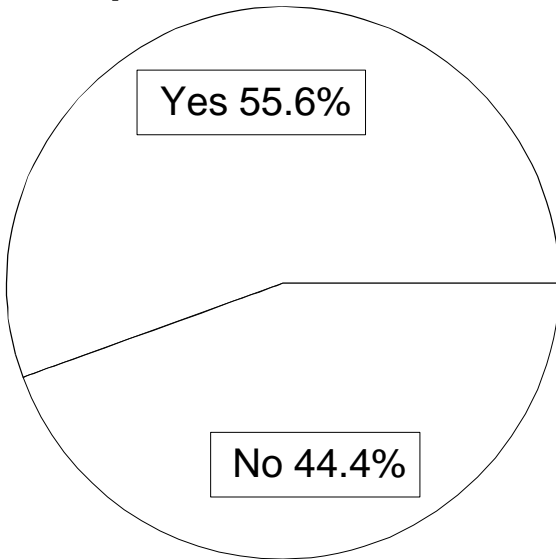
## U.S. RESERVES REPLACEMENT 1998

Are you replacing your U.S. production with new reserves?

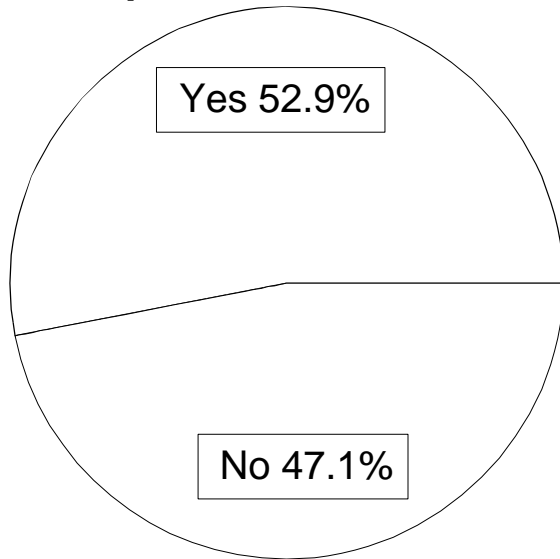
### All Respondents



### Respondents $\geq$ \$1 Million



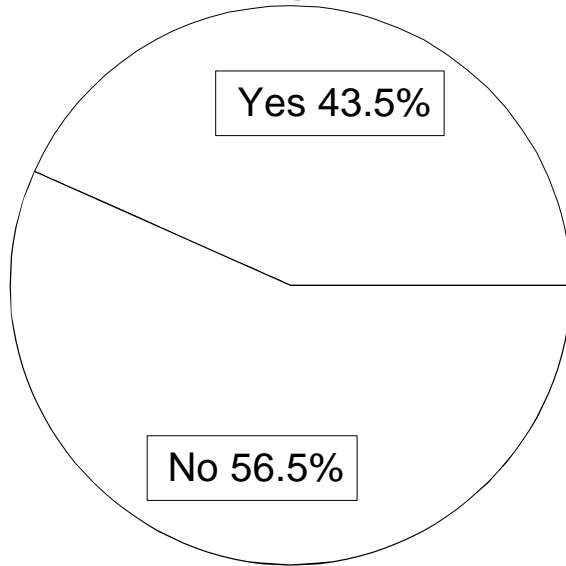
### Respondents $<$ \$1 Million



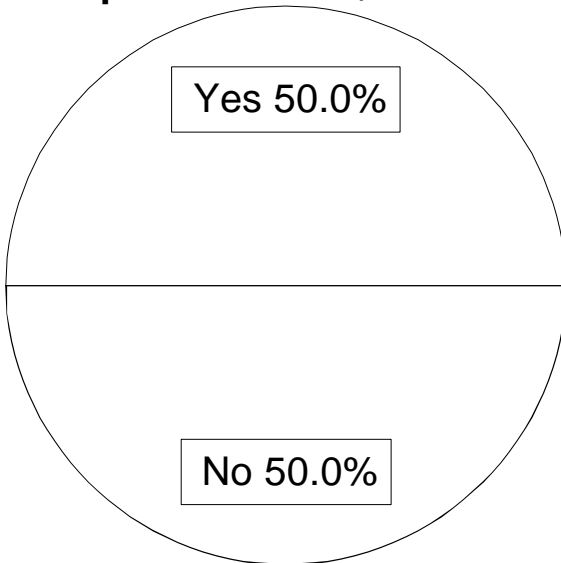
## NEVADA RESERVE REPLACEMENT 1998

Are you replacing your Nevada production with new reserves?

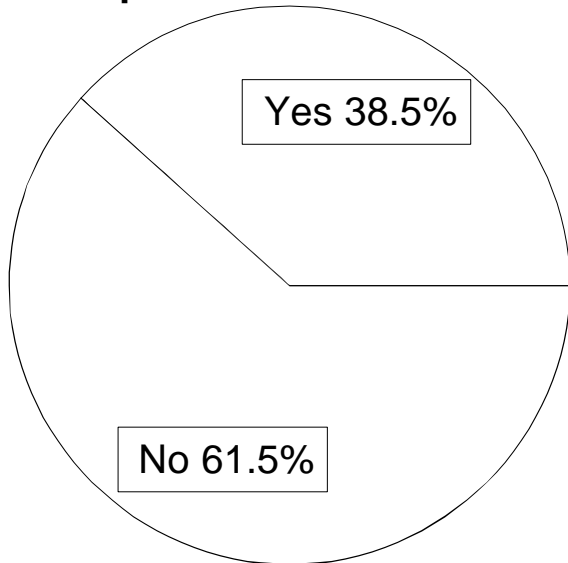
### All Respondents



### Respondents $\geq$ \$1 Million



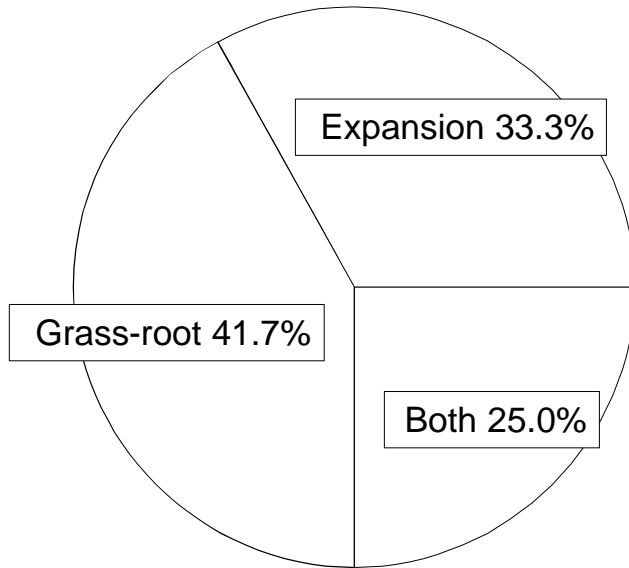
### Respondents $<$ \$1 Million



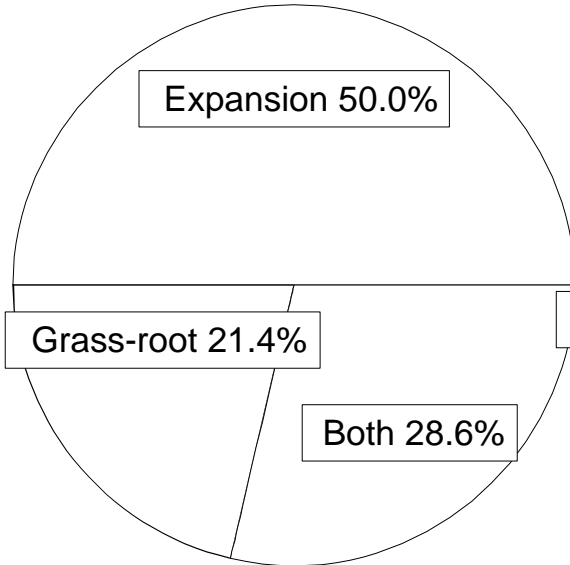
## METHODS OF RESERVE REPLACEMENT 1998

Do your discoveries represent expansions or grass-root discoveries?

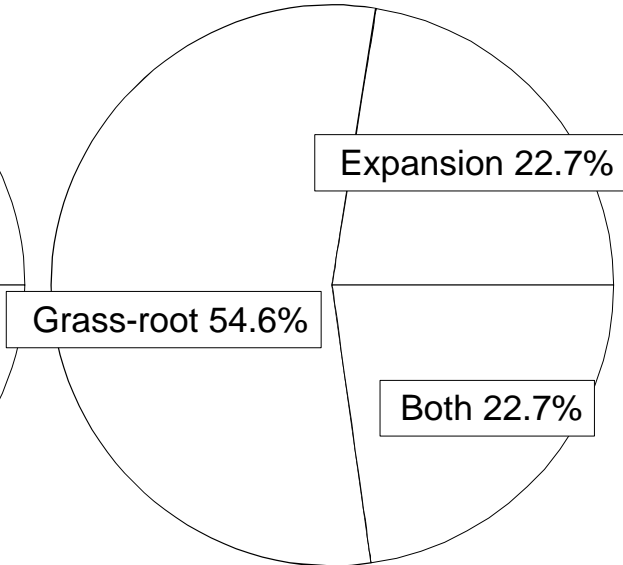
### All Respondents



### Respondents $\geq$ \$1 Million



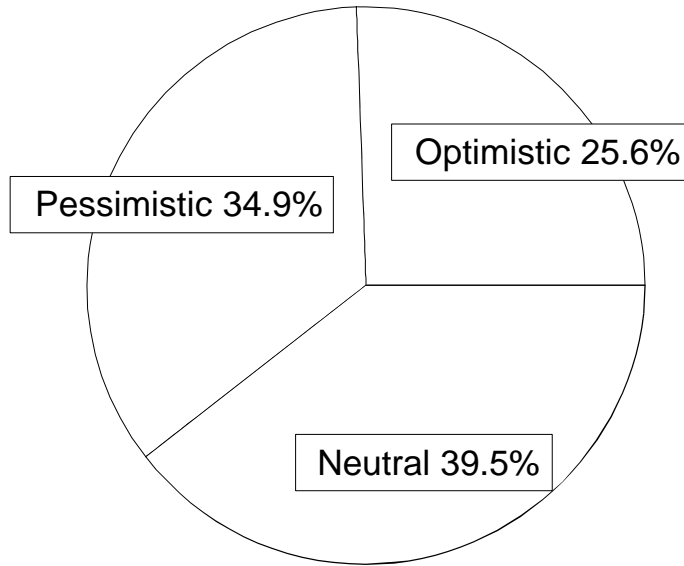
### Respondents $<$ \$1 Million



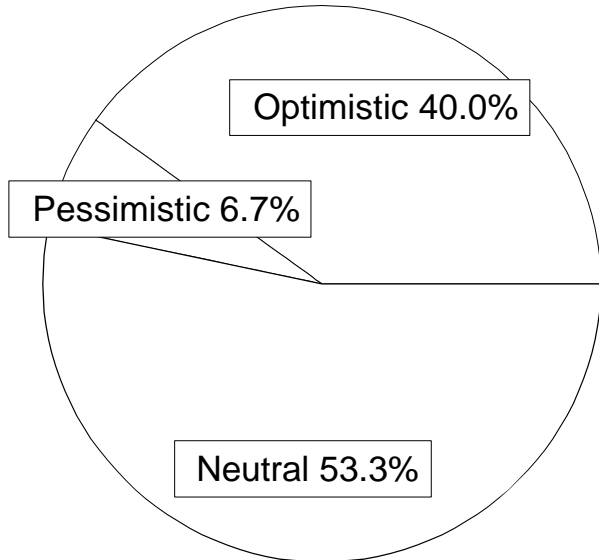
### ATTITUDES 1998

Do you feel generally optimistic, neutral, or pessimistic about domestic exploration?

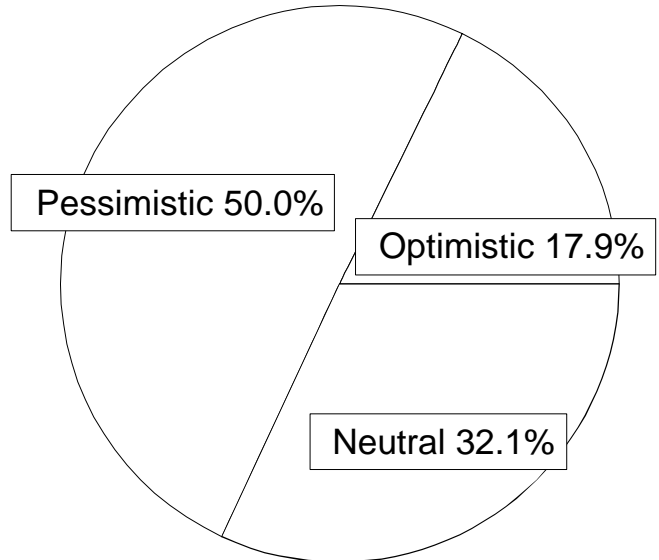
#### All Respondents



#### Respondents $\geq$ \$1 Million



#### Respondents $<$ \$1 Million



**Nevada Division of Minerals  
Annual Exploration Survey**

Company Name: \_\_\_\_\_

Contact Person/Phone: \_\_\_\_\_

**A. Level of Exploration Activity**

	1997 Actual	1998 Planned	1999 Planned
1. Total Worldwide expenditures	_____	_____	_____
2. Total U.S. expenditures	_____	_____	_____
3. Nevada expenditures	_____	_____	_____
4. Number of geologists worldwide	_____	_____	_____
5. Number of geologists in U.S.	_____	_____	_____
6. Number of geologists in Nevada	_____	_____	_____
7. Number of claims held in U.S.	_____	_____	_____
8. Number of claims held in Nevada	_____	_____	_____

**B. General questions (if not applicable, please indicate)**

1. Are you replacing your overall production with new reserves?
2. Are you replacing your U.S. production with new U.S. reserves?
3. Are you replacing your Nevada production with new Nevada reserves?
4. Do your discoveries represent expansions or grass-root discoveries?
5. Do you feel generally optimistic, neutral, or pessimistic about domestic exploration?

**C. Level of exploration activity has been or will be influenced by:  
(please circle the appropriate number)**

	A great deal		Somewhat		Not much
1. Commodity prices	5	4	3	2	1
2. Federal claim maintenance fees	5	4	3	2	1
3. Permitting timeframes					
a) actual length of time	5	4	3	2	1
b) uncertainty over time	5	4	3	2	1

4.	Uncertainty over mining law reform	5	4	3	2	1
5.	Wilderness Study Areas	5	4	3	2	1
6.	Existence of favorable geology	5	4	3	2	1
7.	Changes in foreign mining laws	5	4	3	2	1
8.	Announcements of new discoveries and expansions	5	4	3	2	1
9.	Land exchanges/withdrawals	5	4	3	2	1
10.	Corporate demands	5	4	3	2	1
11.	Mergers	5	4	3	2	1
12.	Other _____	5	4	3	2	1

**D. Please write out your specific concerns about mining law reform provisions.**

If you have already responded to this question in previous surveys, and have no changes, please check the box. No need to respond again.

1. Patenting\_\_\_\_\_
2. Royalties\_\_\_\_\_
3. Determining suitability/citizen lawsuits\_\_\_\_\_
4. Changing claim boundaries\_\_\_\_\_
5. Other\_\_\_\_\_

**Please return this survey to the Nevada Division of Minerals, 400 W. King St., Suite 106, Carson City, NV 89703, or fax it to (775) 687-3957.**

**Thank you.**