

From: mahmoud.thiam@gmail.com
Sent: Monday, July 27, 2009 8:45 AM
To: A A <asher@bsgresources.com>
Subject: Fw: Visit to Beijing

Sent from my BlackBerry® wireless device

From: "Alexander Rocos"
Date: Mon, 27 Jul 2009 12:37:01 +0000
To: Mahmoud Thiam<mahmoud.thiam@gmail.com>
Subject: Fw: Visit to Beijing

Dear Mahmoud,

Do we read between the lines that our friends are somehow unwilling to engage with us at this point - whether in Beijing, Shanghai or Hong Kong?

If they have commitments for China access perhaps we should know. Your guidance would be apprcd so we can stand down some of the initiatives that are underway which are themselves very serious.

Thanks Mahmoud.

Best wishes,

With Kind Regards,

Alexander Rocos

Sent via BlackBerry®

From: shalom tougeman
Date: Mon, 27 Jul 2009 14:59:28 +0300
To: <rocos@isthmusholdings.com>; <barry.cheung@hkmerc.com>
Subject: RE: Visit to Beijing

Dear Alex and Barry,

thank you very much in trying to help arranging the meetings of Mr. Beny Steinmetz in Hong Kong. unfortunately, we will not be able to visit Hong Kong this time as we will be focusing Beijin and Shanghai and time will not allow us to visit HK.

we will be planning a separate visit to HG in the near future which i am sure will be successful.

allow me to be in touch with you once we have ne dates to a visit to HK.

in the meanwhile i thank you for your help and cooperation.

best regards,

sh

> From: rocos@sh163.net
 > To: barry.cheung@hkmerc.com
 > CC: shaltour@hotmail.com; beny@bsg-investments.com; mahmoud.thiam@gmail.com
 > Subject: RE: Visit to Beijing
 > Date: Fri, 24 Jul 2009 16:29:42 +0800
 >

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>
> Dear Barry,
>
> Further to our telcons, please note the following exchanges. I would be very
> grateful if you could kindly arrange liaison with Mr. Turgeman to arrange a
> convenient time to meet with Mr. Steinmetz. I will also do my best to attend
> in HK if at all possible.

>
> With kind regards,

>
> Alex

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> -----Original Message-----

> From: Beny Steinmetz [mailto:beny@bsg-investments.com]
> Sent: 24 July 2009 16:07
> To: rocos@isthmusholdings.com; mahmoud.thiam@gmail.com
> Cc: Shalom Turgeman
> Subject: Re: Visit to Beijing

>
> Dear Mr Rocos .
> We will be glad to meet your friend Mr Cheung , during our visit to HK .
> Which will be from the 6th till the 8th incl . By saying semi official I
> meant that PM Ehud Olmert will be with us for the visit . I am CC this e
> mail to Shalom Turgeman , who is working with him/ us and is our senior
> adviser , and is putting the trip together . Shalom , pls coordinate all
> meeting .
> Looking forward
> Beny Steinmetz
> Sent from my Blackberry

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> -----Original Message-----

> From: "Alexander Rocos \ (Personal Mail\)" <rocos@sh163.net>
>
> Date: Fri, 24 Jul 2009 15:21:53
> To: 'Beny Steinmetz'<beny@bsg-investments.com>; <mahmoud.thiam@gmail.com>
> Subject: RE: Visit to Beijing

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> Dear Mr. Steinmetz,

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> Further to my last message below, I would like to check whether your
> schedule in Hong Kong would allow time for a meeting with the Chairman of
> the Hong Kong Mercantile Exchange (! HKMEX), Mr. Barry Cheung. I feel a
> meeting with Barry would be very interesting for you since he is intimately
> familiar with various aspects of our own activities over the course of a
> number of years. We have worked as consultants and advisers to Barry and his
> team over a number of years on a number of very significant sized projects
> in China and elsewhere and he is well versed with our abilities.

>
> Barry is also former CEO of publicly listed 'Titan Petrochemicals Group' in
> Hong Kong and prior to that CEO of 'Fortune Oil PLC' (which was also listed
> on the London Stock Exchange) and is very knowledgeable in the methodologies
> required for mineral resources co-operation in mainland China. Barry is also
> Chairman of the HK Govt's Urban Renewal Authority. Interestingly, his deputy

> at the HKMEX has recently joined CIC in Beijing as head of the 'Alternative
> Assets Division' (one of three central divisions of CIC - and the division
> that will follow mineral resource investments such as these) and is the
> immediate superior of Mr. Zhang whom Mahmoud met in Beijing with us last
> week.
>
> If you could spare the time in your schedule, I do feel that a private
> meeting with Barry Cheung would be informative and productive for you whilst
> you are in Hong Kong.
>
> Please do let us know.

>
> With kind regards,
>
> Alexander Rocos

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> -----Original Message-----

> From: Alexander Rocos (Personal Mail) [mailto:rocos@sh163.net]
> Sent: 24 July 2009 12:01
> To: 'Beny Steinmetz'; mahmoud.thiam@gmail.com
> Subject: Visit to Beijing

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> Dear Mr. Steinmetz,

>
> Many thanks indeed for your kind message below. I agree that it is perhaps
> more appropriate and efficient that we should be in contact directly.

>
> I have noted ! your travel plans with interest and I am very happy to hear
> that they include a trip to China in the very near future. Since I too will
> be Beijing from the 2nd of August it seems much more sensible for us to
> arrange to meet during your trip. I note that your trip is a 'semi official'
> visit: does this imply that you are travelling within the constraints of a
> broader delegation in some way? Perhaps we can pencil in a suitable day to
> meet (in Beijing?) once you know your schedule.

>
> Please do bear in mind that in China, on matters such as those at Simandou,
> it is vital that channels of dialogue to the decision-making apparatus at
> the highest level be established and maintained in parallel with any purely
> 'commercial' discussions. This is a very delicate time for discussion on a
> project such as Simandou and any such discussion on it, in particular, needs
> to be handled in a sophisticated manner at this point. We can guide you in
> further detail when we meet and can also arrange for an informal meeting
> with senior friends within CIC and/ or other interested parties when you are
> here if desired. Meeting first as trusted friends helps a lot here.

>
> The iron ore sector is an area where we are particularly familiar over many
> years, having arranged as far back as in the mid 1990's a large part of the
> seaborne transportation requirements for the 'Shougang' ('Capital Steel')
> steel mill in Beijing. As you may know, Shougang were among the first
> mainland Chinese Steel Groups to venture internationally upstream and bought
> a major iron ore mine in Peru in 1994 as a precursor to a successful listing
> (back door) on the HKSE. Their logistical and transportation constraints
> were significant and it was they who approached us to successfully resolve
> them by arranging the purchase of a series of large capesize bulk carrier

- > vessels that were ultimately employed exclusively in the transportation of
- > iron ore from Peru to China for a number of years in the service of
- > Shougang. Seaborne transportation is, in fact, our main core fields - with a
- > speciality on the larger size dry cargo (capesize) and tanker (Suezmax and
- > VLCC) vessels - and we have maintained very close contact over 15 years with
- > many of the largest players in the resources sector here as a result.
- >
- > We also understand that a large part of the Simandou projects challenges
- > revolves around the resolution of transport and logistical hurdles for the
- > export programme to get under way. We would very much like to learn more of
- > this aspect given our own long area of activity in this field. Perhaps we
- > may better understand this in due course through our dialogue with you also
- > since this is of real interest to us and will, inevitably, be a key point
- > for any investor to grasp.
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