# ANNEX B Study to investigate state of knowledge of deep sea mining

# Consultation Paper

## About the Consultation

### Purpose of the consultation

This consultation paper has been prepared in support of a planned communication by the European Commission on seabed mining. The communication intends to ensure that EU Member States and stakeholders are able to capitalise on the potential of seabed mining to generate sustainable growth and jobs.

Marine mining and deep sea mining are part of the EU`s Blue Growth strategy under the thematic area of marine mineral resources. The activity encompasses the mining of a wide range of materials from the see bottom, ranging from aggregates (sand, gravel) to shallow water mining of higher value materials (diamonds, gold, phosphates, tin, but also iron ore) to minerals such as copper, zinc, cobalt and gold that are mined at large depths. According to the Communication, up to 10% of global production of minerals such as cobalt, copper and zinc could come from the ocean floors by 2030, providing global annual turnover of up to €10 billion.

Most of the current mining activities take place in shallow waters. Offshore sand and gravel mining is a well-established industry many countries of the world including the Denmark, Netherlands and the UK. Diamond mining has also been successfully operated off the coast of Namibia and South Africa for a number of years. Experience, technology and knowledge gained through shallow mining as well as land mining is expected to serve future deep-sea mining operations, hence a number of questions relate to these two areas.

Mining in the deep sea is still a novel activity. To investigate the potential of deep sea mining a study to investigate the state of knowledge of deep sea mining is carried out by Ecorys under contract from the European Commission.

The main purpose of this study is to feed information, data and specific examples to identify potential for sustainable growth and job creation and to ascertain the degree to which policy making could support the development of the sector. The study will look at three main types of deep sea mining, these are:

* Polymetallic nodules;
* Polymetallic sulphides;
* Cobalt-rich crusts.

### Scope of the consultation

The consultation focuses on identifying the current state and potential of marine mining in terms of jobs, future development, competitive position of Europe and investment potential. At the same time an assessment is made of the key bottlenecks and main challenges in the sector.

Within the consultation three main types of mining are distinguished:

* Shallow water aggregates mining;
* Shallow water mining of higher value materials (incl. gold, diamonds iron ore);
* Deep sea mining (high value metals and minerals).

We recognise that there are some questions that you might not be familiar with or might not be relevant to you; in this case, simply tick the “not applicable” options and proceed to the next question. For the questions which you are familiar with, please provide your views in the box provided and, where possible, indicate your best estimate with regard to figures.

### Timing: How can I contribute?

We would like to receive your completed questionnaire by **16 May 2014**. However, if you would like to respond to this survey but are unable to do so before this date, please let us know as soon as possible. While the questionnaire is provided in English, we are happy to accept completed responses in other European languages.

### What happens next?

Responses in the public consultation will be used in preparing reports for the Commission which, subsequently, may be published.

If you have specific concerns about how your data will be treated (or on the study more generally), please contact us in the following email and we will be happy to address your concerns.

## The consultation

### Stakeholders involved

The consultation is expected to provide a comprehensive overview of stakeholder opinions therefore, intends to reach out to a variety of stakeholder groups including private enterprises, research centres, national authorities and financial organisations.

It is our expectation that the stakeholder groups will be able to identify how initiatives in the sector are being launched, what are the main thematic areas of focus and where the gap in financing lies.

### Topics of the consultation

The questionnaire is designed in such a way as to address the challenges and issues that might be encountered by the stakeholder groups. Questions include multiple choice as well as open ended types and include space for clarifications and other comments.

The questionnaire is divided into three parts:

* Part A delivers information on the contact details and some basic characteristics of the respondents;
* Part B requests information on the stakeholders level of involvement within the sector and the challenges encountered;
* Part C requests further information specifically on deep sea mining;